

# Evaluation of the Royal National Mòd Glasgow 2019

Final Report prepared by STR & The Glamis Consultancy for  
An Comunn Gàidhealach



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# Introduction



- STR & The Glamis Consultancy were commissioned by An Comunn Gàidhealach (The Gaelic Association) to undertake a social and economic evaluation of The Royal National Mòd (hereafter referred to as the Mòd) which was held in Glasgow between Friday 11<sup>th</sup> and Saturday 19<sup>th</sup> October 2019. 2019 saw the Mòd return to Glasgow after a period of absence of nearly 30 years.
- Run by An Comunn Gàidhealach, the Mòd is the biggest Gaelic cultural festival staged in Scotland with an esteemed 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 art forms.
- The main aims of the association 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 an important component of their ongoing efforts.
- This report sets out the findings of an evaluation of the Royal National Mòd in 2019. A consistent methodology was also used evaluate the Mòd in Dunoon in 2018. Therefore, findings of the 2019 research are presented alongside findings of 2018 to enable comparisons by year.

The key objective of this research was to undertake a social and economic assessment of the Mòd. More specifically, this required:

- Calculating overall levels of attendance
- Evaluating the profile and behaviour of attendees at the event
- Evaluating the economic impact of the Mòd to the local and national level and quantifying the impact of the event in terms of job creation
- Calculating the Return on Investment (ROI) of the event for funding partners
- Evaluating social trends in Gaelic culture and assessing the role of the Mòd in facilitating the use of and promoting Gaelic culture
- Measuring satisfaction of the Mòd and gaining insights to inform the future development and growth of the event

# Methodology



We interviewed, on a random basis, **224** attendees during the Mòd using a Computer Assisted Personal Interviewing (CAPI) approach.



## Face-to-Face Survey

A consistent questionnaire was used in 2019 based on the questionnaire template from 2018. Additional questions were added to meet research requirements requested by **Glasgow Life**.

**224 visitors** were surveyed as part of the approach with views captured across **8 separate days of the event**.

+



## Desk Research & Economic & Social Impact Analysis

Survey findings were combined with desk research and **economic multiplier analysis** to derive overall event attendance and economic impact of the event.

Our analysis calculated **Return on Investment (ROI)** for funding partners.



Both components have informed this report which provides an overview of key findings from the research in relation to the 2019 Mòd with comparisons to the 2018 Mòd.

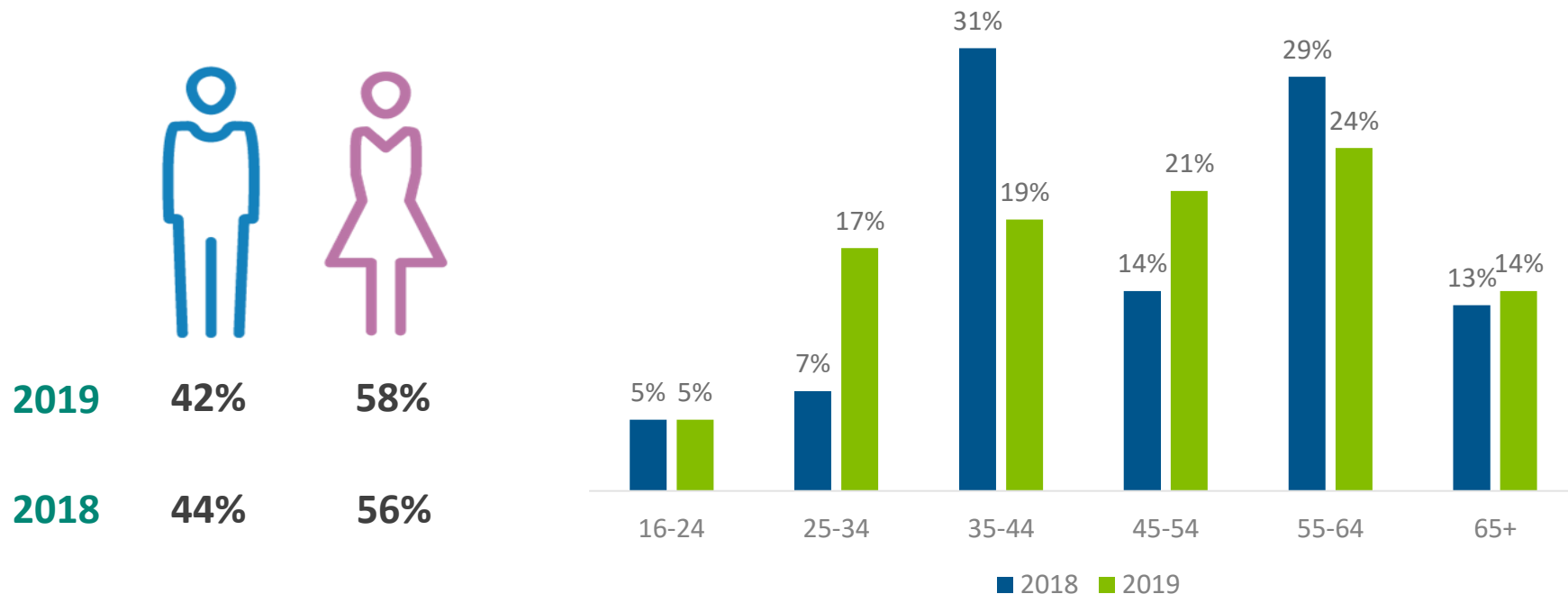


# Survey Findings



# Profile of Mòd attendees & competitors

The event continues to attract more females than males. 2019 saw a slightly younger crowd in comparison to 2018.

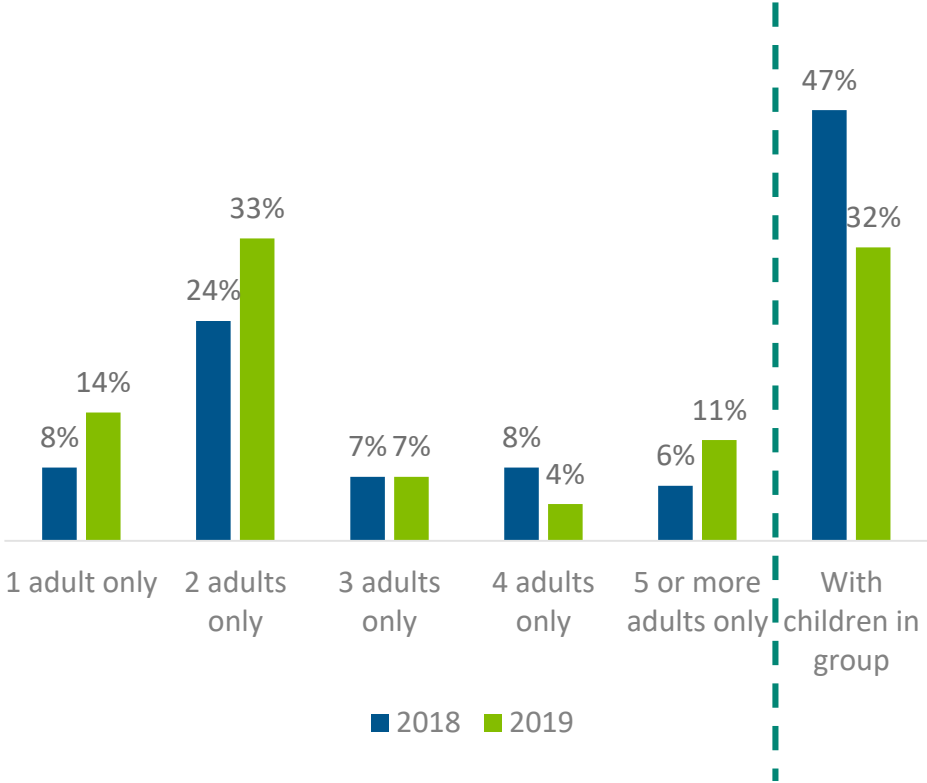




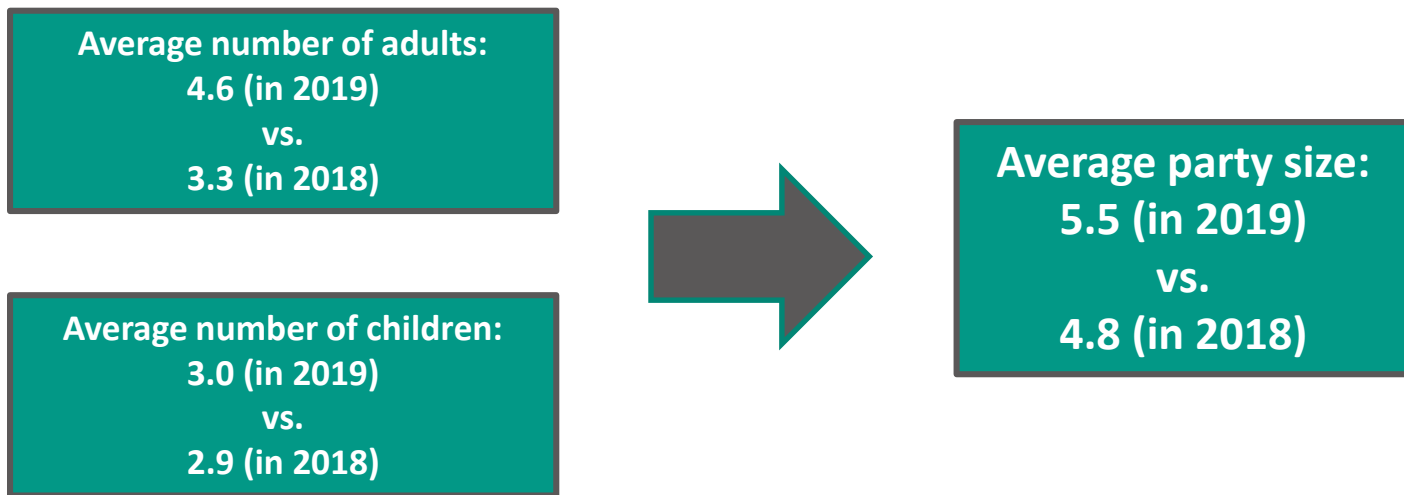
A reflection of a younger profile, fewer attendees came with children. As a result, the most common group in 2019 was 2 adults only.



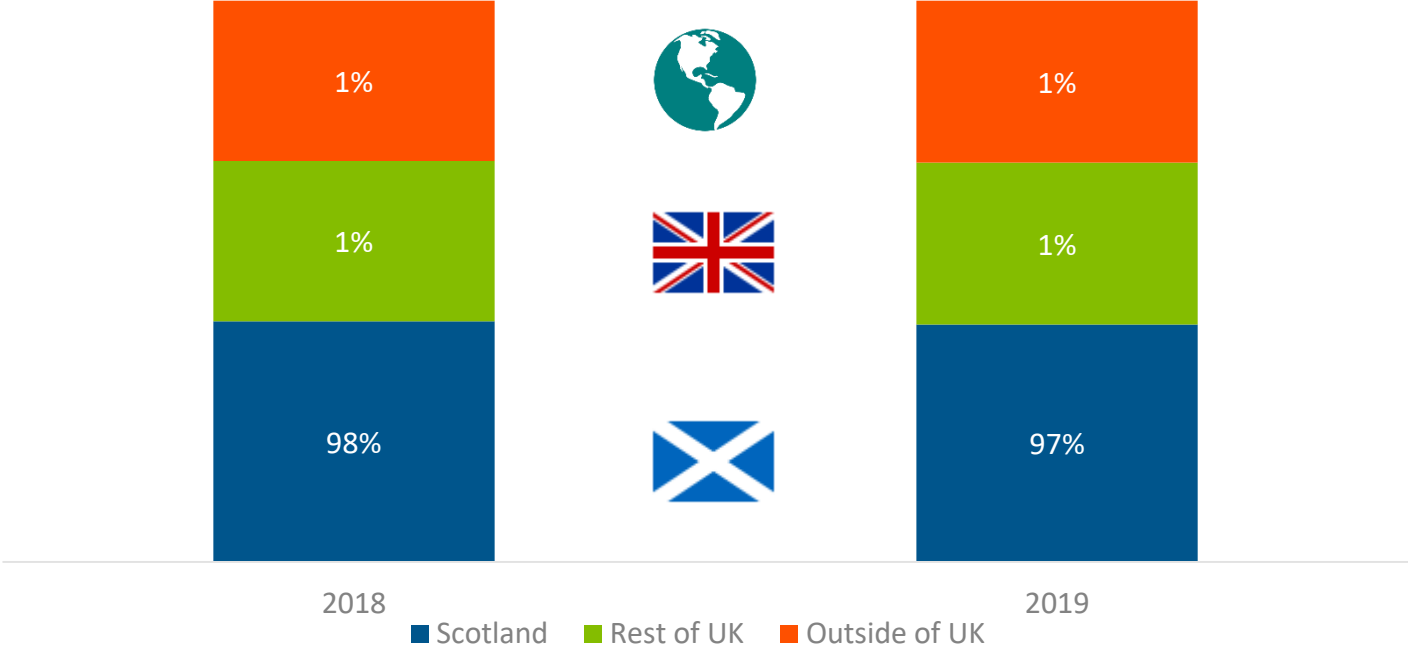
With children  
**2019**    **32%**  
**2018**    **47%**



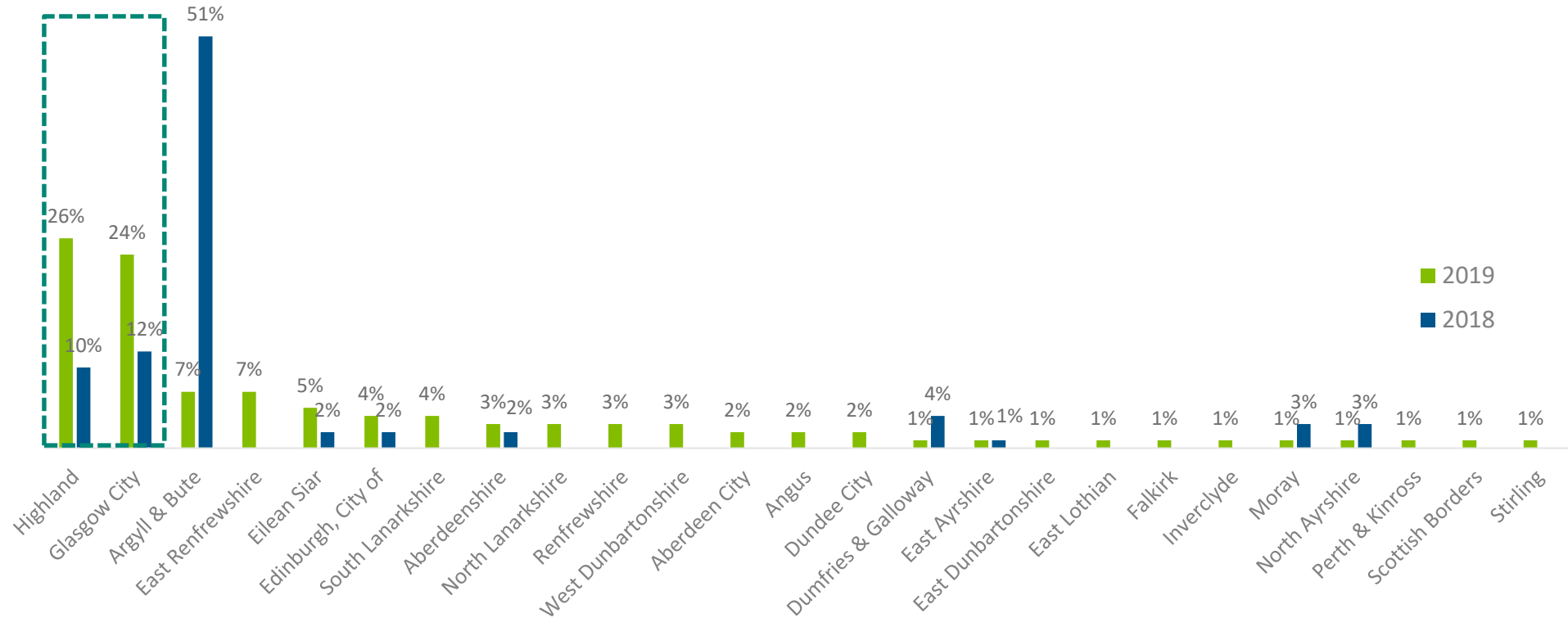
The average party size of 5.5 in 2019 was higher compared to 2018 due to more larger adult groups.



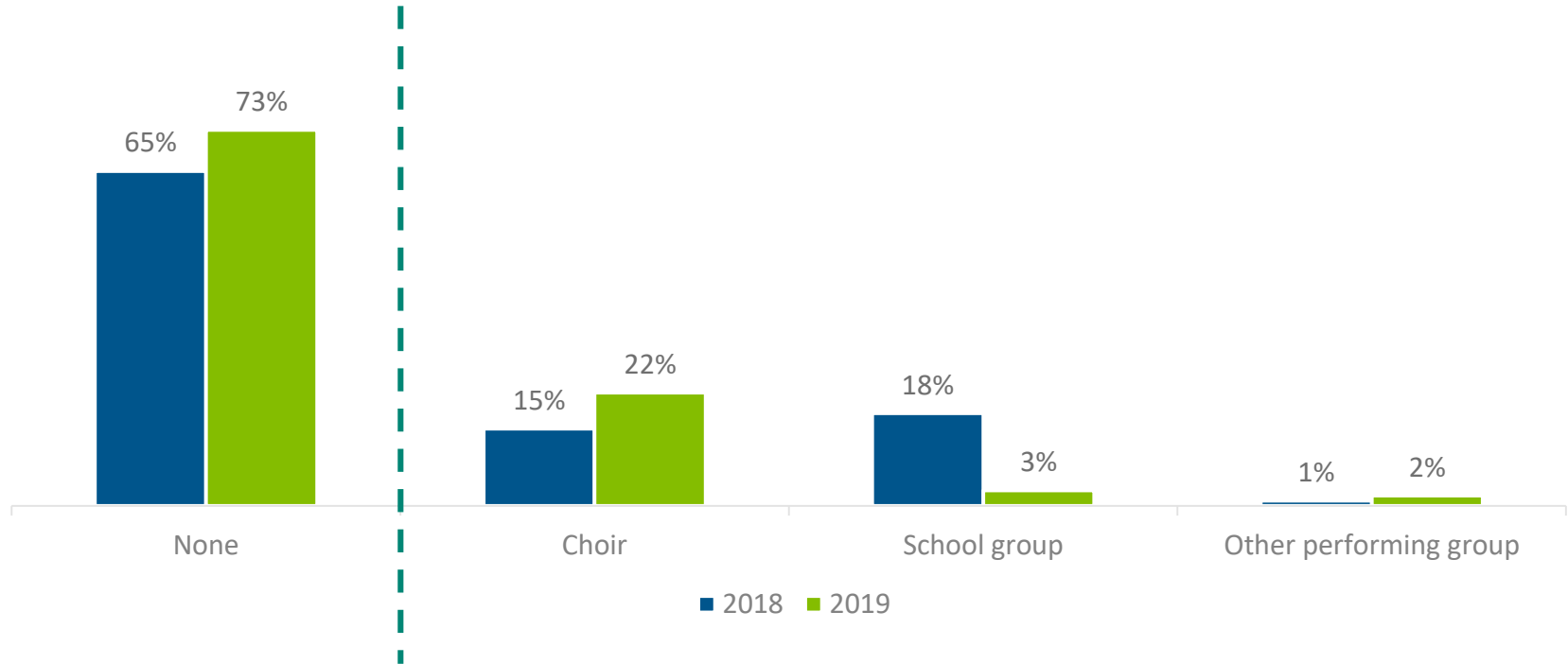
As in 2018, the vast majority of attendees were from Scotland.



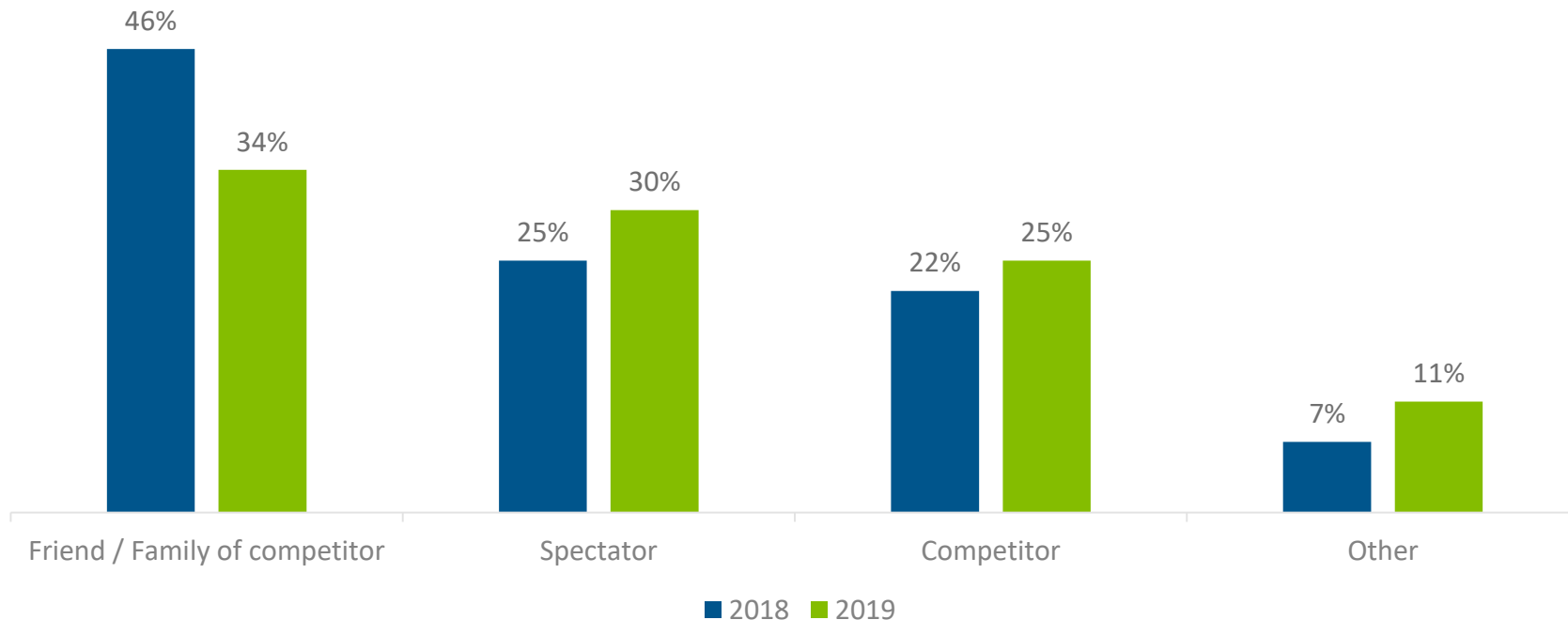
The Highlands and Glasgow City were by far the most common local authority areas in 2019. There were significantly more attendees from the Highlands compared to 2018.



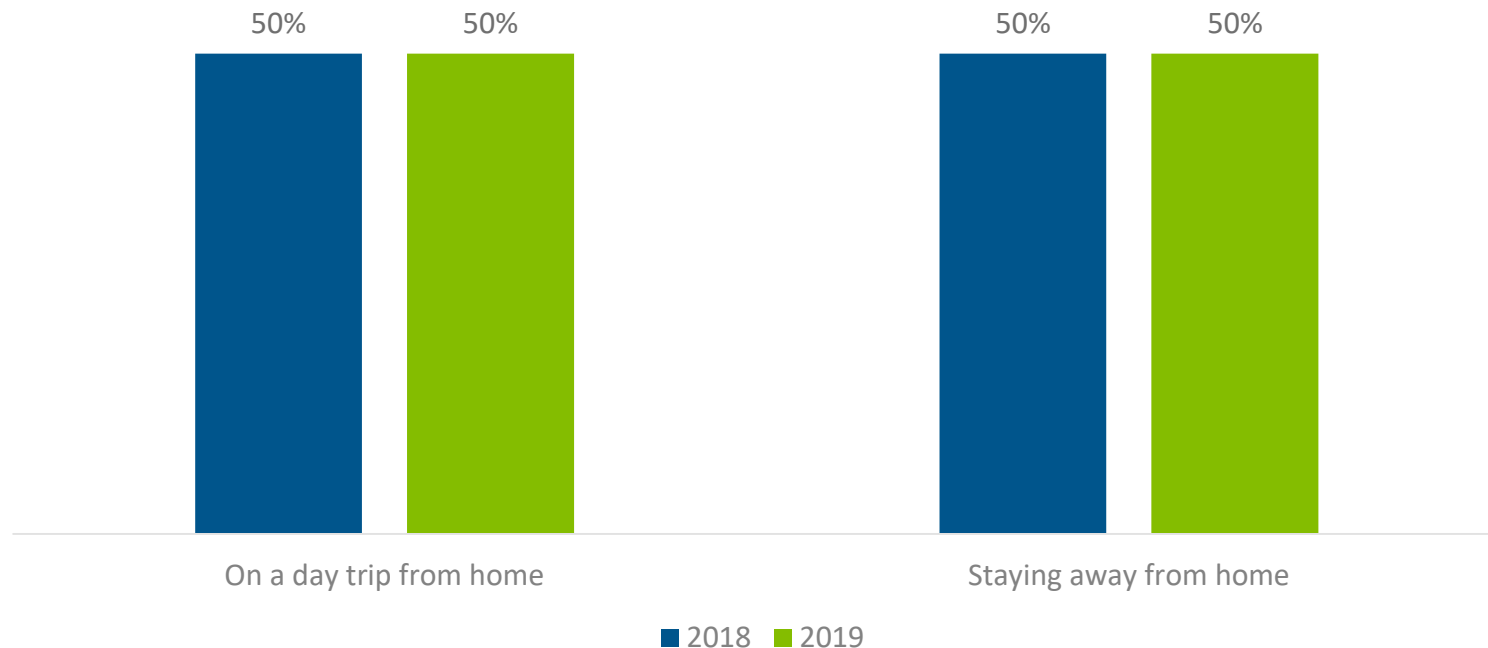
Fewer attendees were part of performing groups in 2019. There was evidence of fewer school groups.



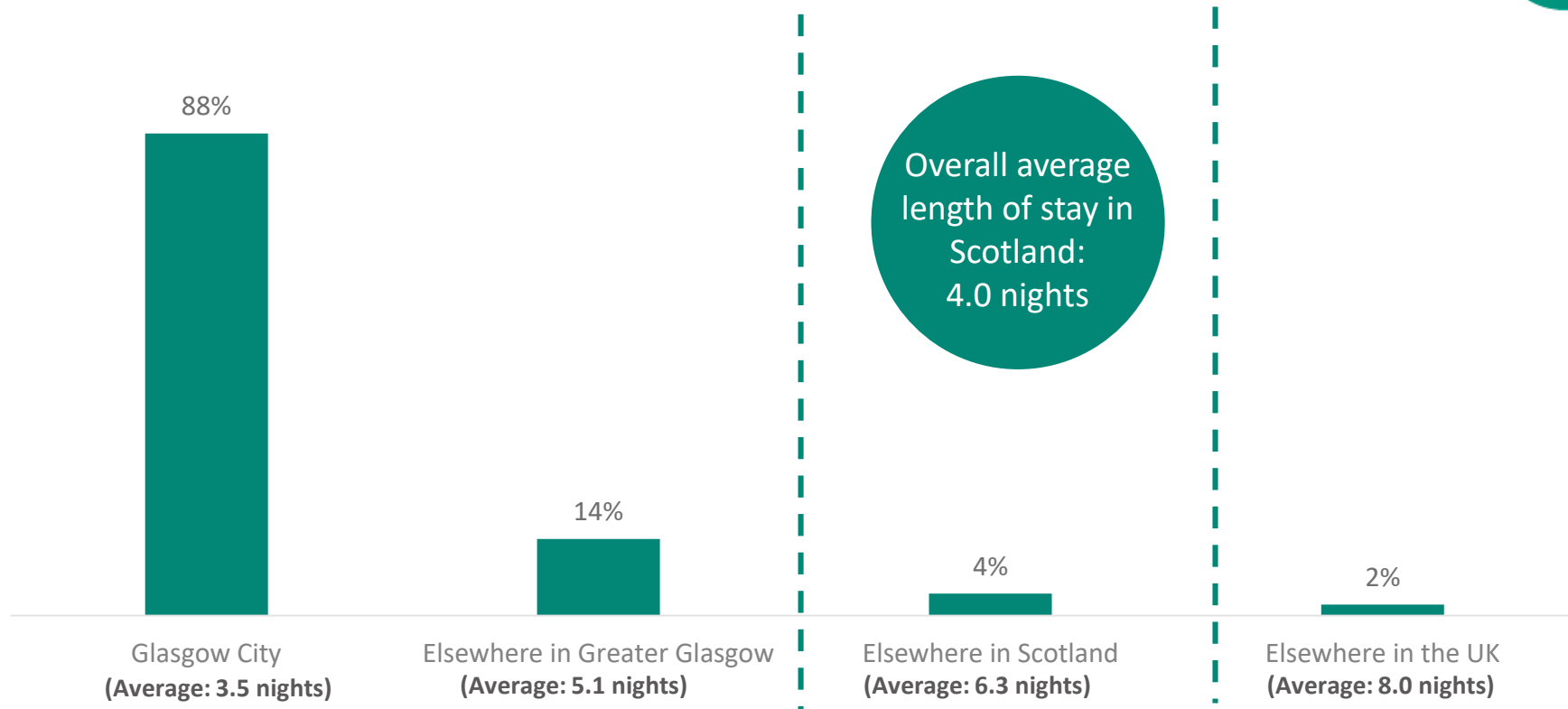
Being a friend or family member of a competitor was the most common reason for attending, although less important compared to 2018.



As in 2018, there was even mix of attendees on a day trip from home and staying away from home.

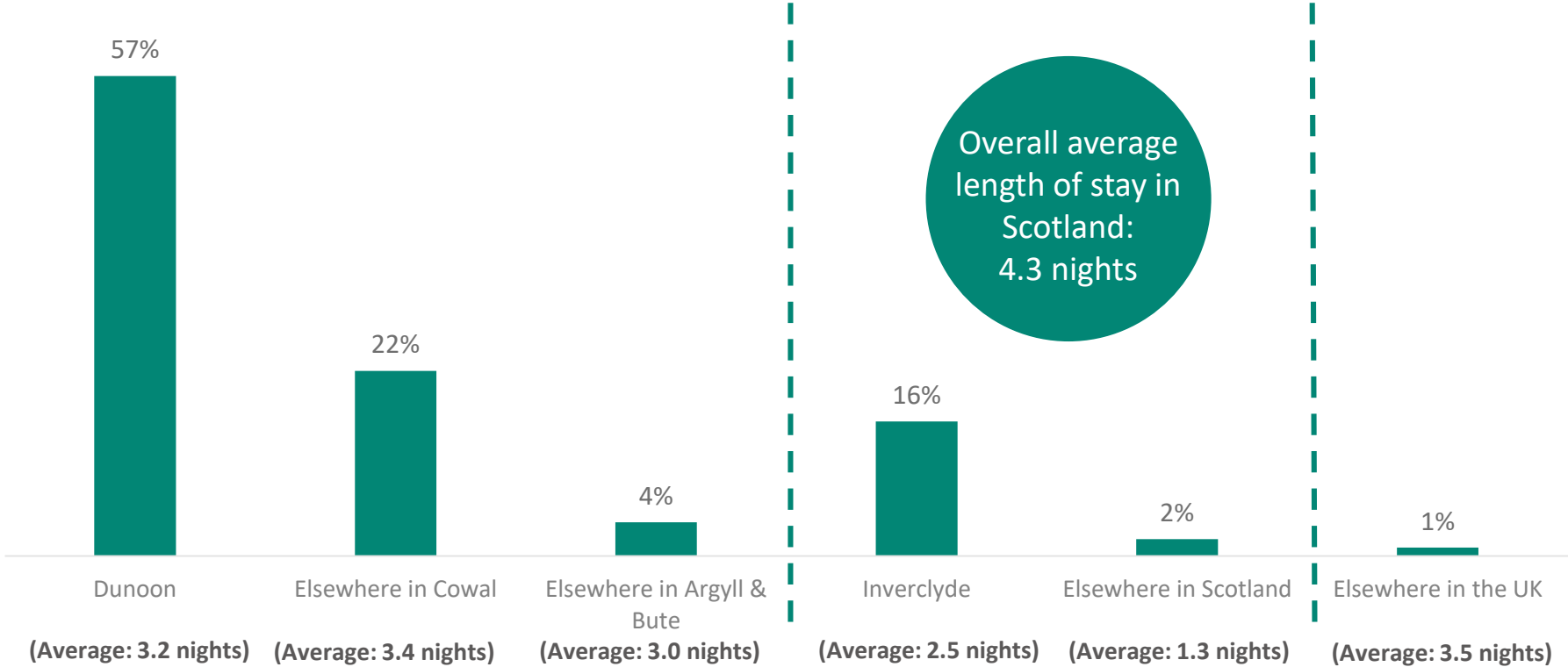


The vast majority stayed in central Glasgow and typically for three or four nights.



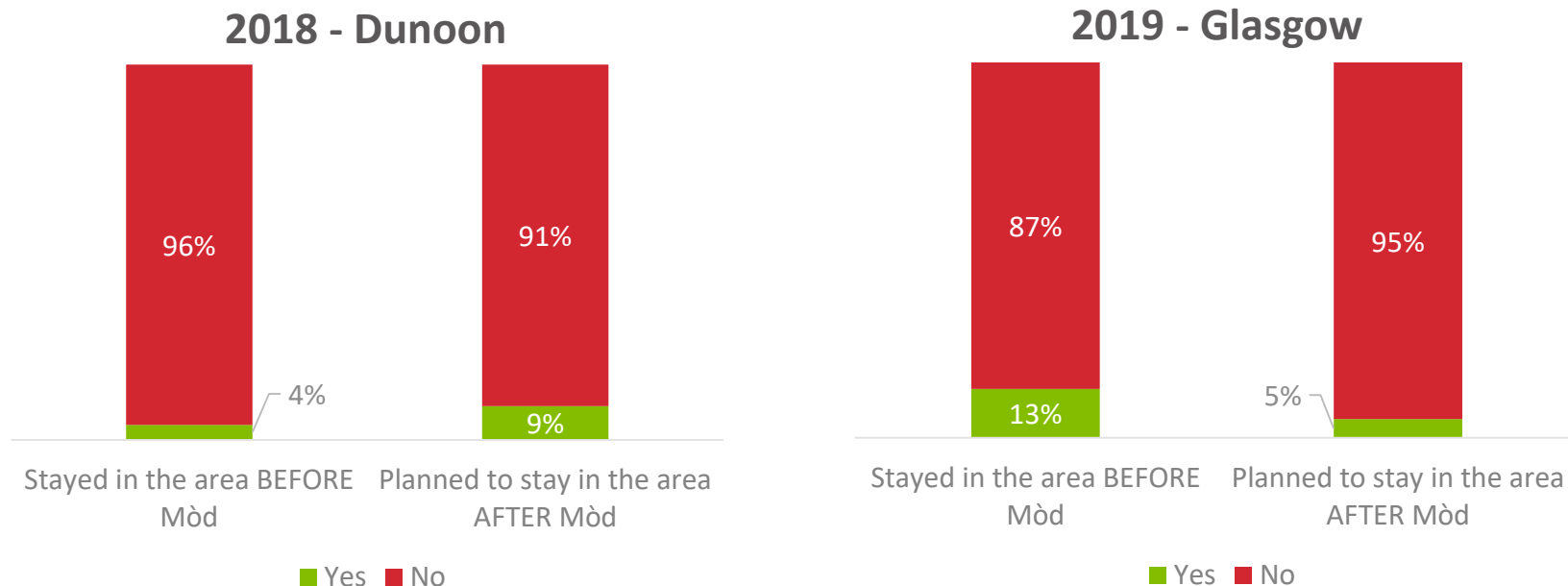


Compared to 2018, more stayed in the host destination and they tended to stay longer in 2019.



Q: How many nights are you staying away from home on this trip in Dunoon / Elsewhere in Cowal / Elsewhere in Argyll & Bute / Inverclyde / Elsewhere in Scotland / Elsewhere in the UK | Base: 101 in 2018 | Note: Multiple response question so percentages may exceed 100%

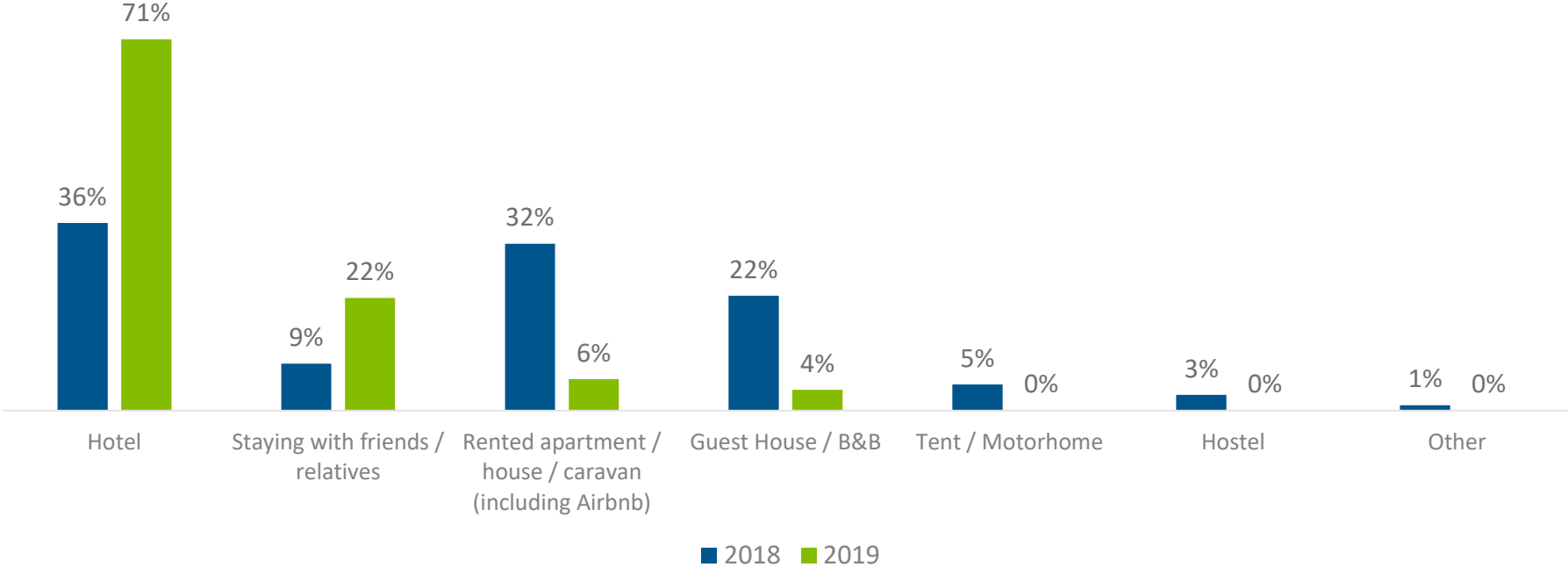
Most staying visitors went to the host destination during the period of the event. More attendees extended their visit for the Mòd in Glasgow.



Q: Did you stay in Glasgow City or the Greater Glasgow area / Dunoon or the broader Cowal area before the Royal National Mòd started? | Base: 111 in 2019, Base: 101 in 2018

Q: Do you intend to stay in Glasgow or the Greater Glasgow area / Dunoon or the broader Cowal area after the Royal National Mòd finishes? | Base: 111 in 2019, Base: 101 in 2018

Hotels were by far the most common form of accommodation and were notably more popular than in 2018. The incidence of VFR also increased whilst short term rental usage decreased.



Q: During your trip, what type(s) of accommodation have you used / will you be using? | Base in 2019: 111, Base in 2018: 101



A half of attendees came from Glasgow and the Highlands in 2019. This marked a shift in profile compared to 2018 as a half came from Argyll & Bute. These findings show that the Mòd attracted a more diverse audience from across Scotland in 2019.

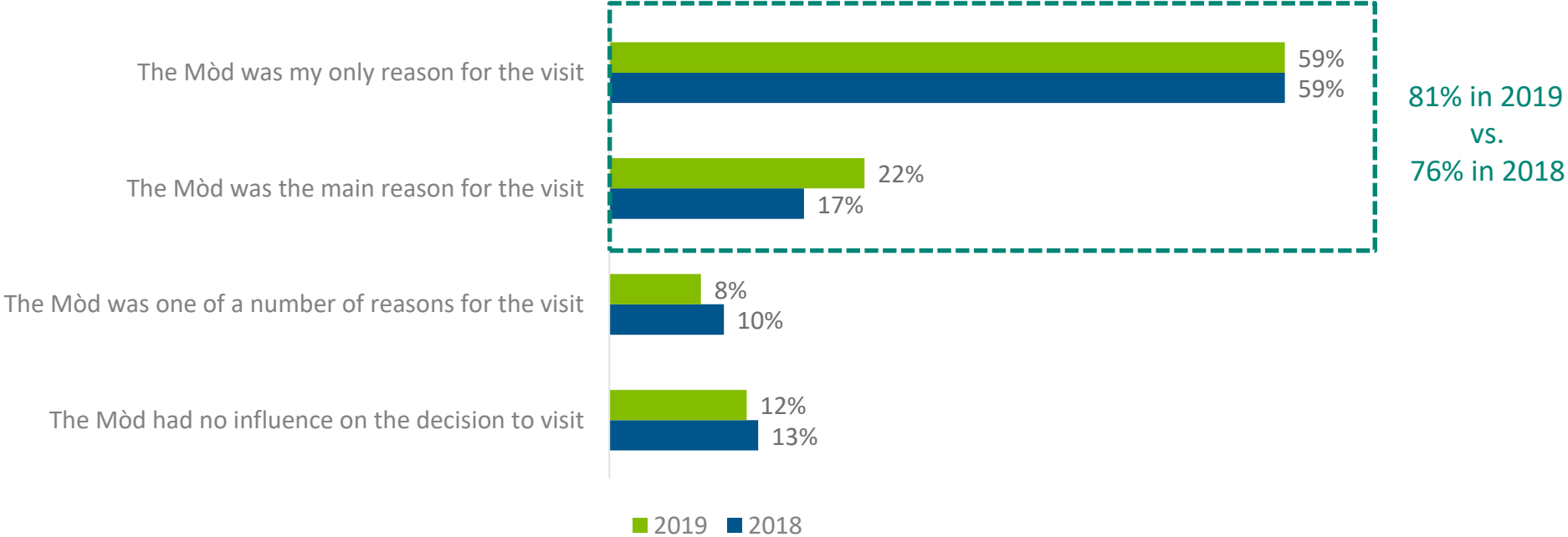
The mix of families was notably lower in 2019 (32% versus 47% in 2018) which was a reflection of a younger audience. The event also appeared to welcome a broader audience in 2019 as there were fewer performing groups and friends and family of competitors than in 2018.

The composition of day and staying visitors was consistent with 2018. Presumably due to increased availability of accommodation, most staying visitors chose to stay in hotels in central Glasgow (whereas in 2018 staying visitors were more dispersed across the local area).

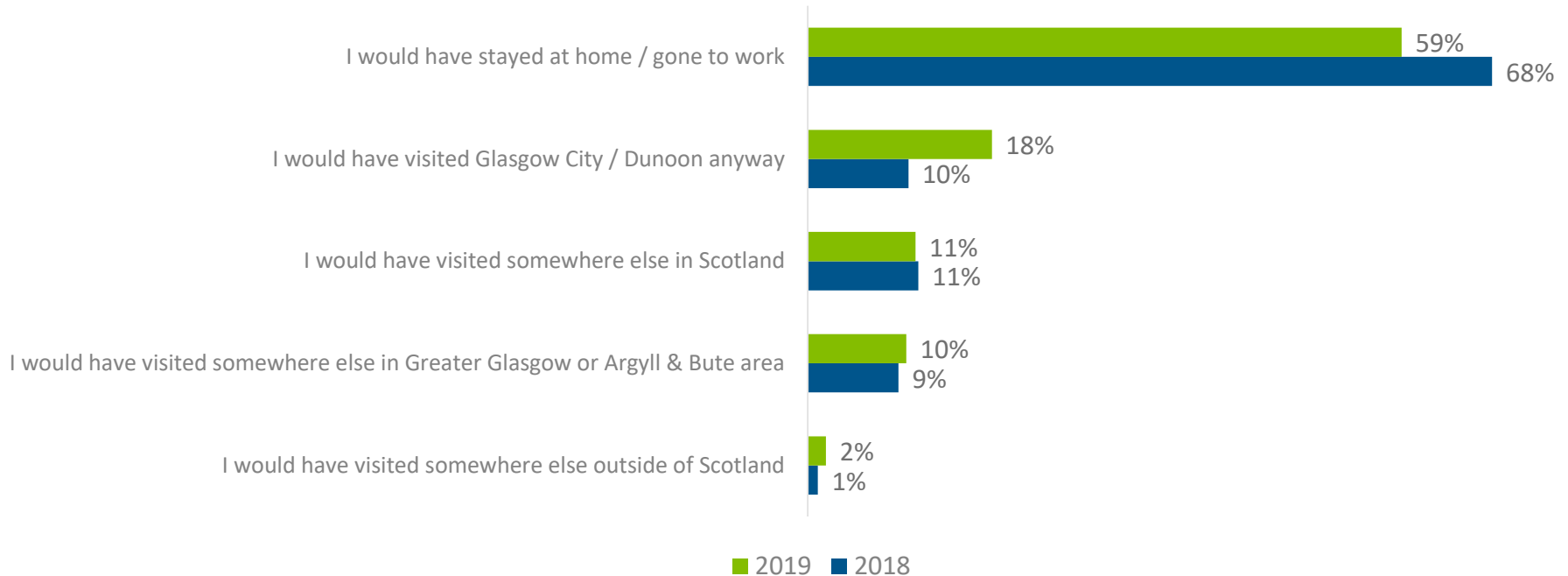


# Importance of the Mòd on the decision to visit Glasgow

Nearly all cited the Mòd as a reason for being in the area. The Mòd was slightly more important as a driver for visiting Glasgow compared to Dunoon.



Highlighting the importance of the event among attendees, most (59% in 2019) would not have substituted the event with other activities.





The Mòd continues to be a key driver in the decision among attendees to be in the area. Over 80% stated that the Mòd was either their only or main reason for visiting Glasgow (compared to the equivalent figure of 76% in Dunoon in 2018).

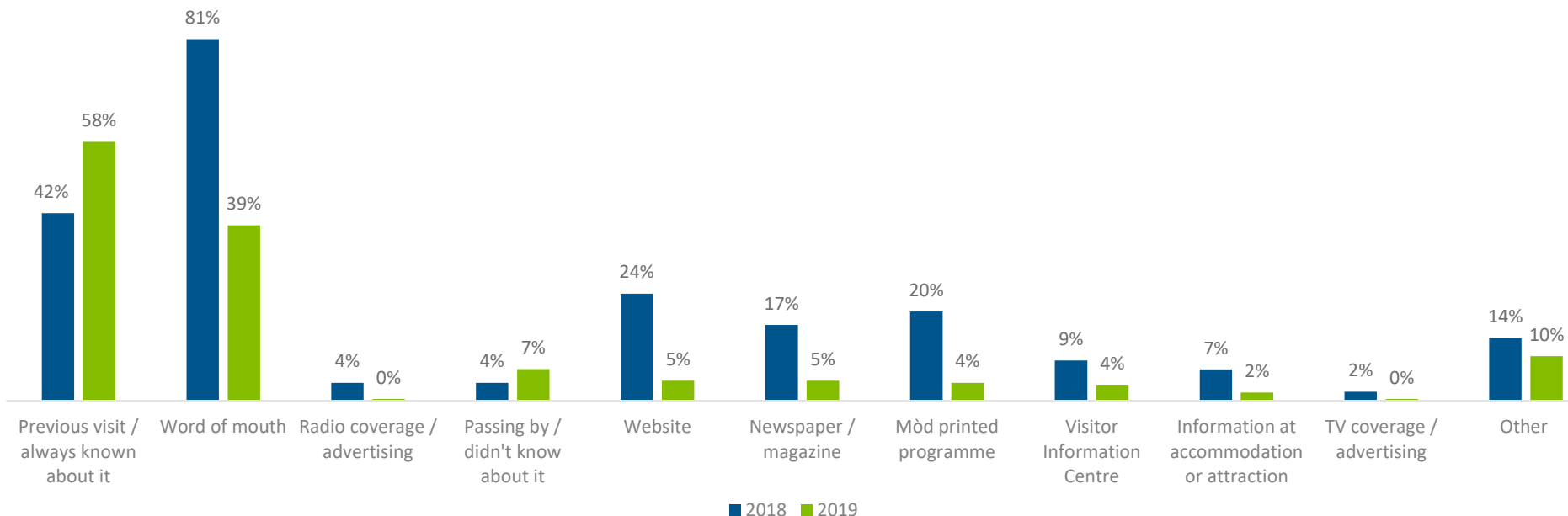
Highlighting the importance of the event as part of their reason for visiting the area, many would have opted to stay home or go to work if they did not visit the Mòd. However, Glasgow appears to have more of a pull factor than Dunoon did with 18% stating they would have visited the city regardless.





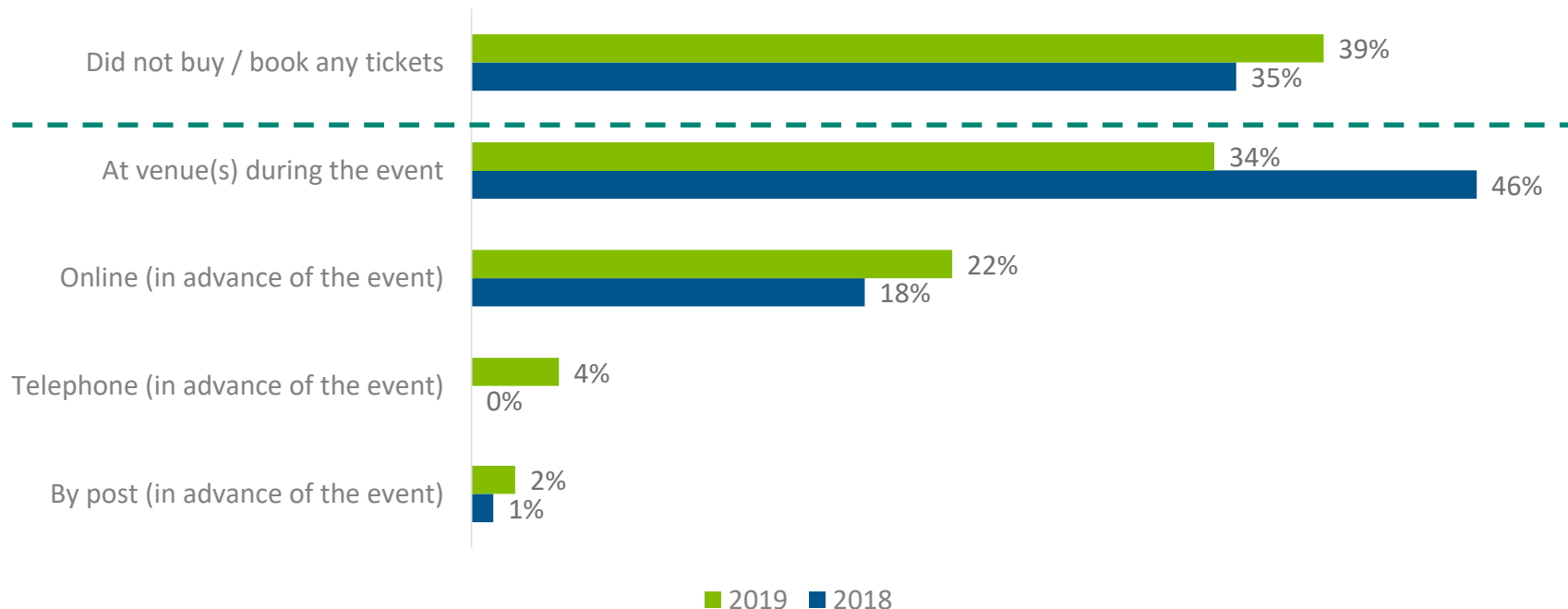
# Planning & booking the Mòd

General awareness appears to be higher in 2019 as 58% found out about the event from existing knowledge compared to 42% in 2018. As a result other forms of marketing and information were less significant in 2019.



■ 2018 ■ 2019

## Fewer attendees purchased tickets at venues during the Mòd and more purchased in advance.





Those who attended the Mòd in 2019 had higher awareness of the event compared to those who went to Dunoon Mòd in 2018. Existing knowledge and word of mouth are key sources of information for attendees. Ensuring high levels of satisfaction for the event will help to positively reinforce these influencing factors for future Mòds.

Likely a reflection of the audience being more aware of and engaged with the event, there was a higher incidence of advance ticket booking in 2019.

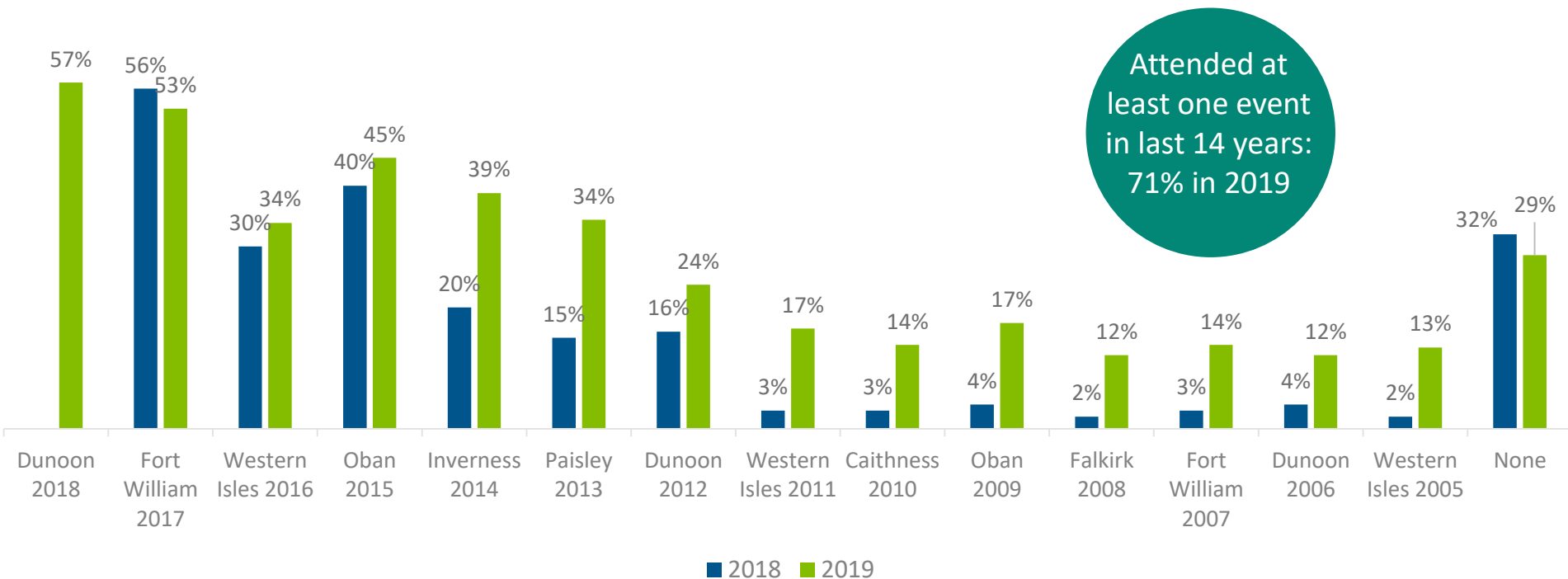


# Engagement with the Mòd

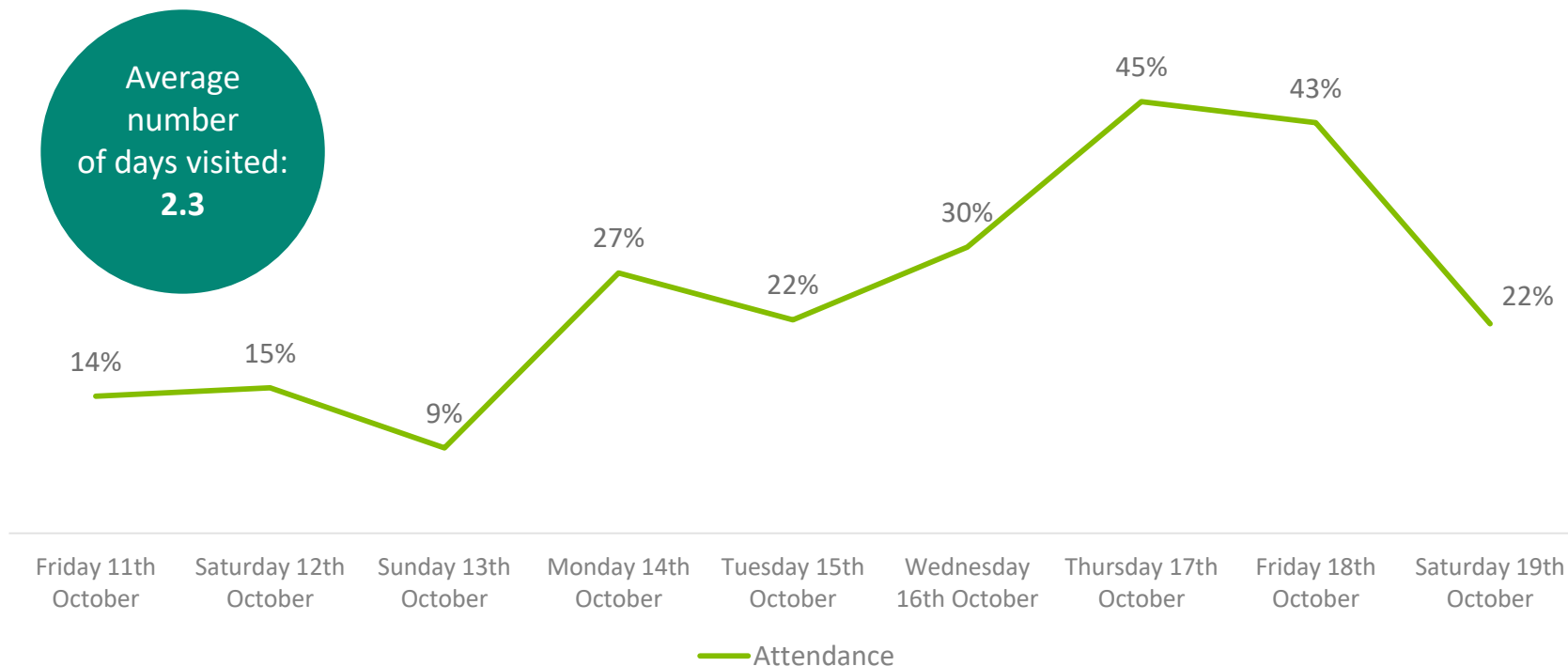
There was higher engagement with previous Mòds compared to 2018. Attendees were most likely to have visited last year's Mòd in Dunoon. Overall, over 70% had attended at least once in the last 14 years.



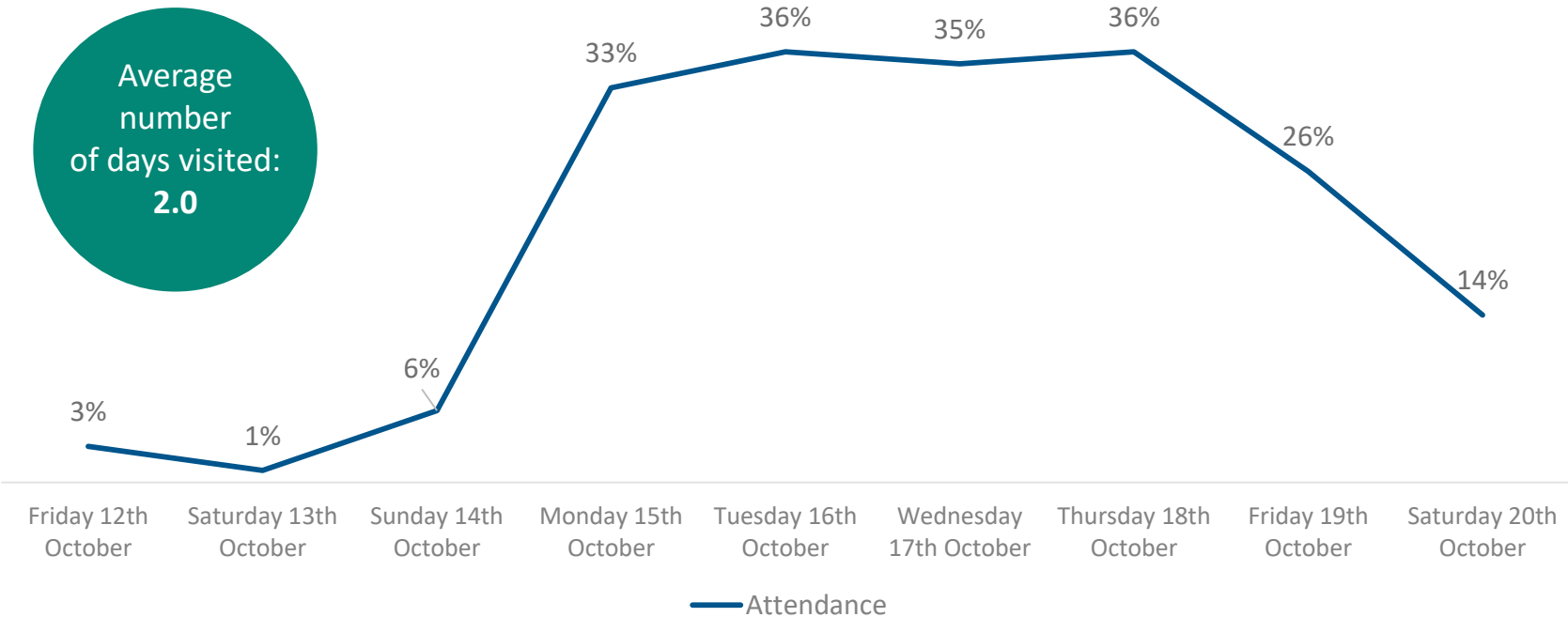
Attended at least one event in last 14 years: 71% in 2019



Attendance peaked on Thursday 17<sup>th</sup> and Friday 18<sup>th</sup>. Attendees visited the event typically two or three days.

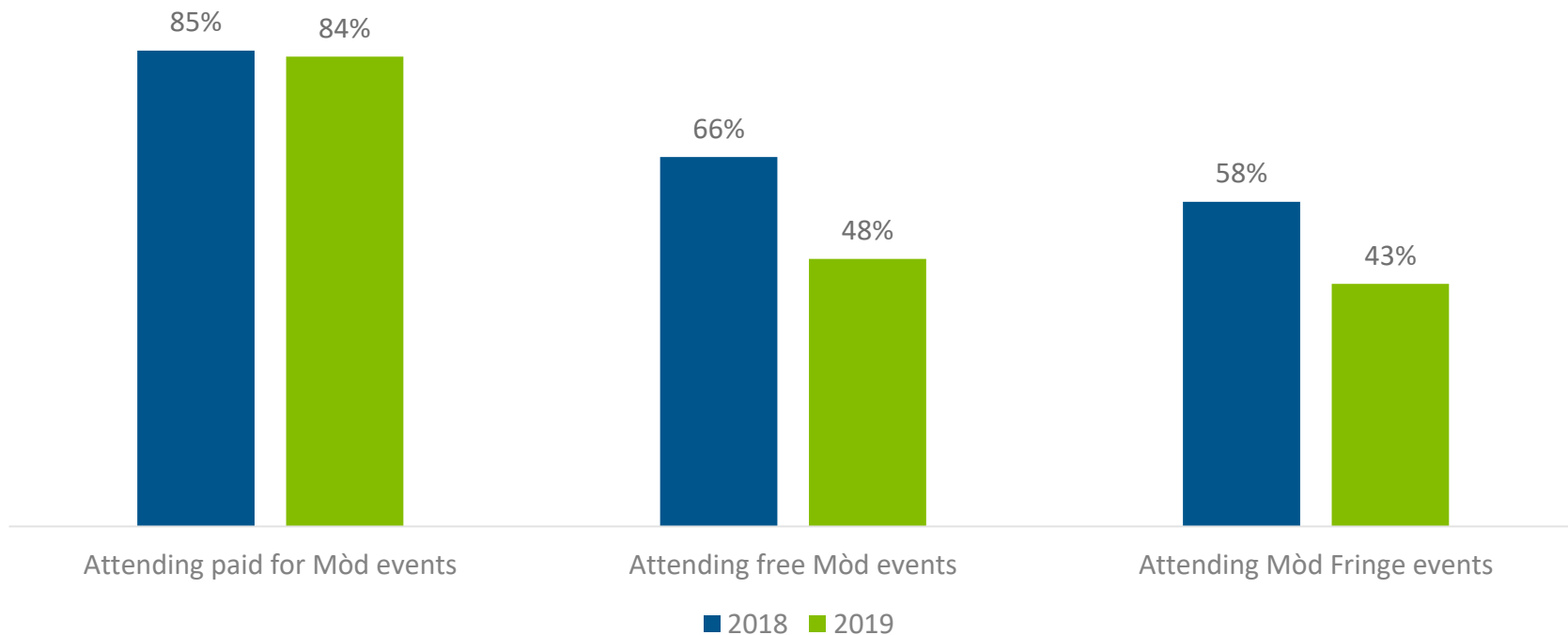


Compared to 2018, there was evidence of more participation at the start and the end of the event, although the Monday and Tuesday of the event were less popular in 2019.

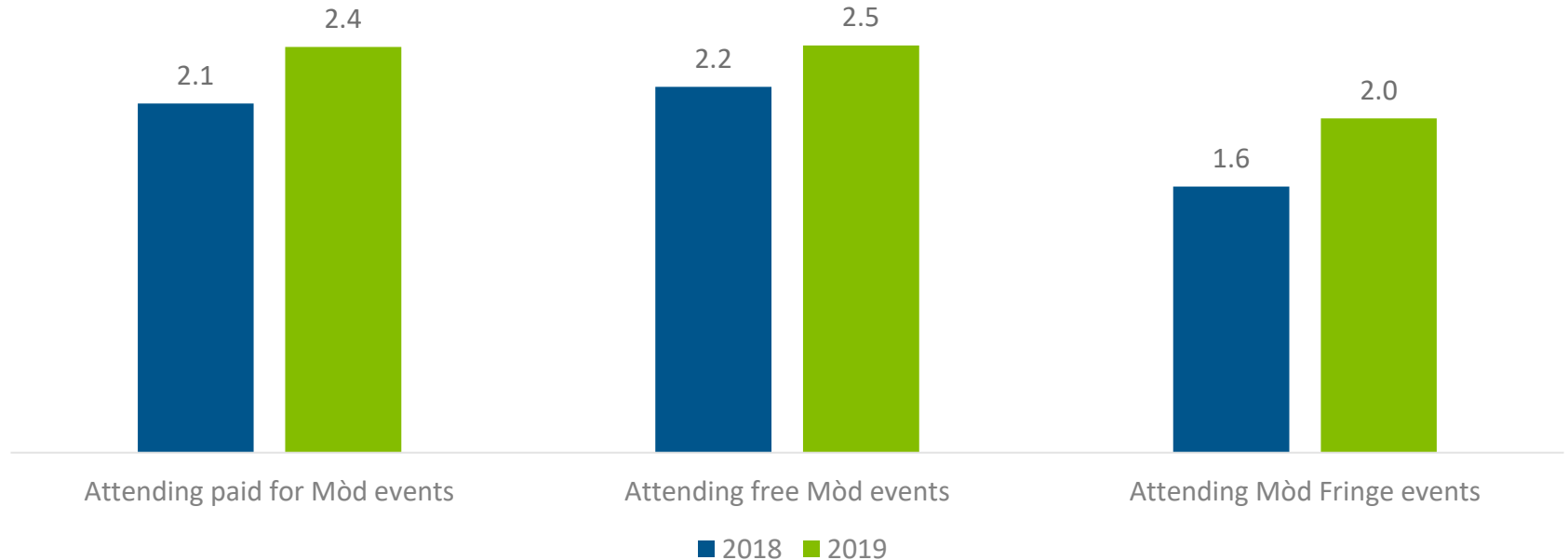




# Attendees were less likely to go to Mòd events and Mòd Fringe events in 2019.



Among those who attended paid, free and Fringe events, they tended to go to more events compared to 2018.



Attendees demonstrated higher engagement with the event and host destination in 2019. Eating and drinking out and attending paid Mòd events were the most common activities.



	2019 Most days %	2018 Most days %	2019 Some days %	2018 Some days %	2019 Once only %	2018 Once only %	2019 None %	2018 None %
Eating out in the Glasgow / Dunoon area	30%	24%	28%	29%	31%	36%	8%	8%
Attending paid for Mòd performances	22%	6%	30%	37%	33%	44%	10%	10%
Visiting pubs and bars in the Glasgow / Dunoon area	18%	8%	30%	31%	22%	22%	24%	35%
Attending Mòd Fringe events	9%	1%	26%	36%	21%	27%	31%	27%
Shopping in the Glasgow / Dunoon area	9%	3%	33%	44%	32%	31%	24%	20%
Attending free Mòd performances	8%	6%	30%	42%	22%	24%	28%	24%
Visiting attractions and / or places of interest in Glasgow city / Dunoon	2%	2%	22%	30%	11%	12%	53%	49%
Visiting other areas / attractions / places of interest elsewhere in the Greater Glasgow / Argyll & Bute area	2%	1%	19%	23%	5%	7%	61%	60%



A reflection of attendees being more engaged with the Mòd than last year, attendees were more likely to have visited the event in the past. The large majority (71%) were repeat attenders which highlights strong underlying appeal among a core audience.

Thursday 17<sup>th</sup> and Friday 18<sup>th</sup> October were the most popular days to attend. The average number of days attended was 2.3. Compared to last year, there was more visitation overall across the event period.

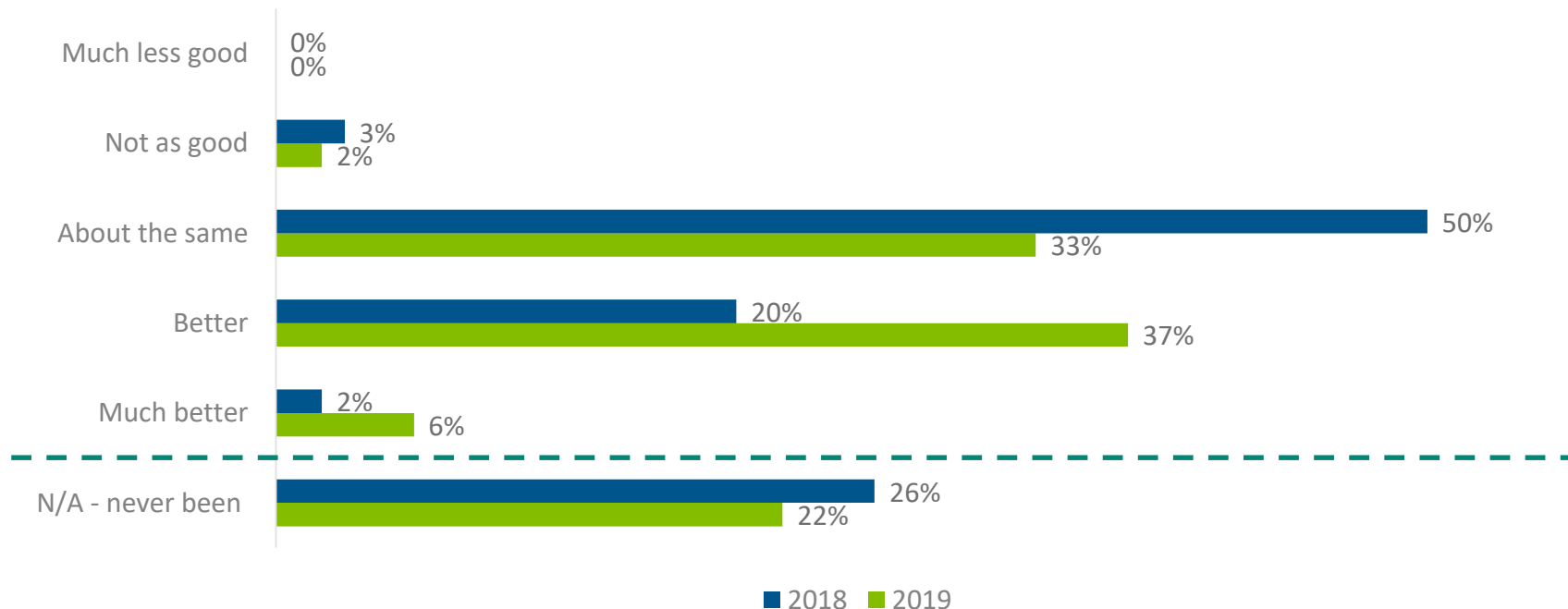
The above being said, free Mòd and Fringe Mòd event visitation overall was below last year. This finding was perhaps due to fewer attendees having links with competitors than last year.

Attendees undertook more leisure activities in the host destination compared to 2018 which supports the positive economic impact findings.



# Rating the Mòd

## Fringe attendees suggested that this year's Fringe was better than previous years.

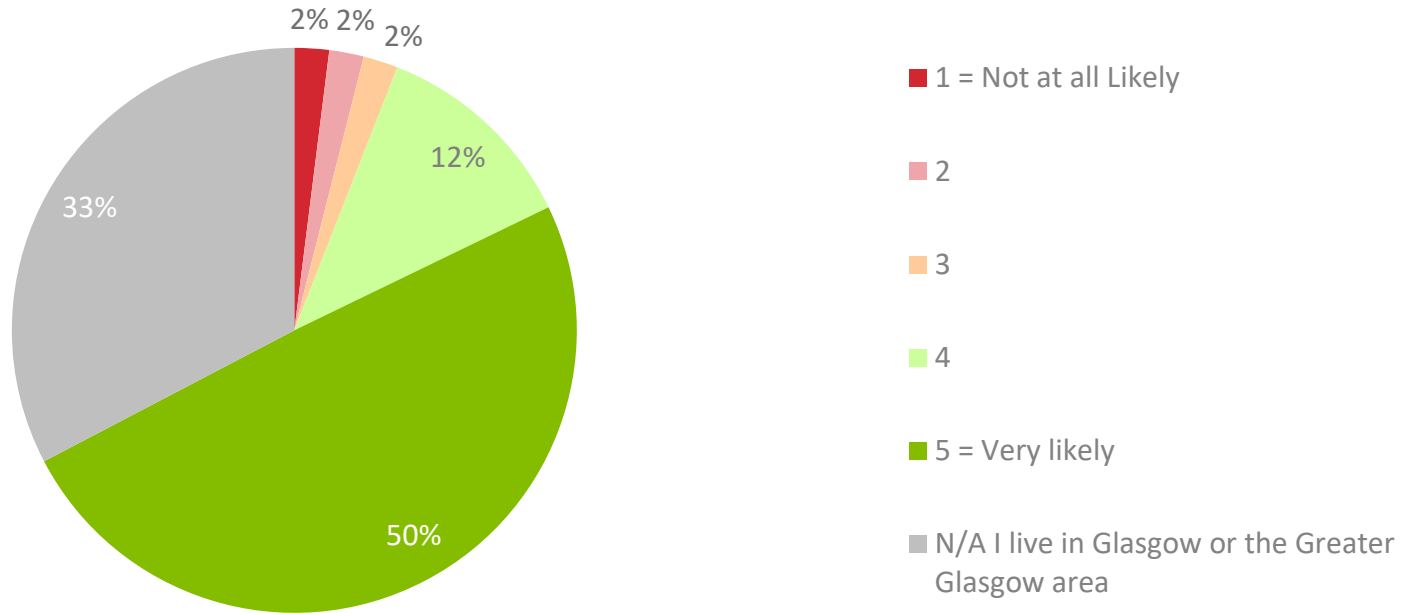


Satisfaction regarding the event organisation and delivery was higher in 2019. Expectations regarding the host destination and range of local facilities along with Mòd competition venues were exceeded the most.



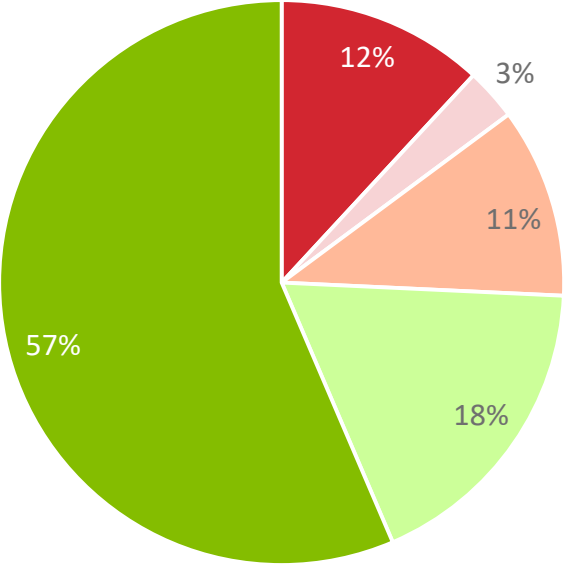
	2019 Well above %	2018 Well above %	2019 Above %	2018 Above %	2019 Matched %	2018 Matched %	2019 Below %	2018 Below %	2019 Well below %	2018 Well below %
Glasgow / Dunoon as the host destination for the Mòd	18%	1%	42%	23%	25%	62%	2%	0%	1%	0%
Local restaurants / cafes	18%	1%	25%	12%	45%	71%	1%	4%	1%	0%
Local shopping	17%	1%	23%	7%	41%	64%	0%	5%	1%	0%
Local pubs / bars	17%	2%	21%	6%	42%	55%	0%	5%	1%	0%
Mòd competition venues	16%	0%	36%	19%	30%	66%	0%	0%	1%	0%
The wider "City centre," experience in Glasgow / Dunoon	14%	1%	23%	12%	38%	61%	1%	6%	1%	0%
Your overnight accommodation	10%	3%	16%	18%	24%	35%	2%	0%	0%	0%
The buzz / overall atmosphere of the Mòd	10%	2%	54%	23%	23%	62%	4%	0%	1%	0%
Visitor attractions	9%	2%	18%	13%	34%	44%	0%	0%	1%	0%
Organisation of the Mòd	8%	0%	26%	14%	45%	65%	1%	3%	1%	0%
Information on the Mòd	8%	1%	23%	14%	46%	67%	6%	1%	1%	0%
Mòd fringe events	8%	1%	38%	16%	21%	47%	1%	0%	1%	0%
The food offer	7%	1%	15%	7%	35%	66%	4%	1%	1%	0%

As to be expected given both the popularity of Glasgow as a destination and its proximity, respondents stated that they were likely to visit the area again for a future leisure visit.





Three quarters of this year's attendees are likely to attend Inverness 2020.  
Compared to last year, there is perhaps slightly lower appeal.



**Average rating: 4.1 (2019)**  
VS.  
**Average rating: 4.2 (2018)**

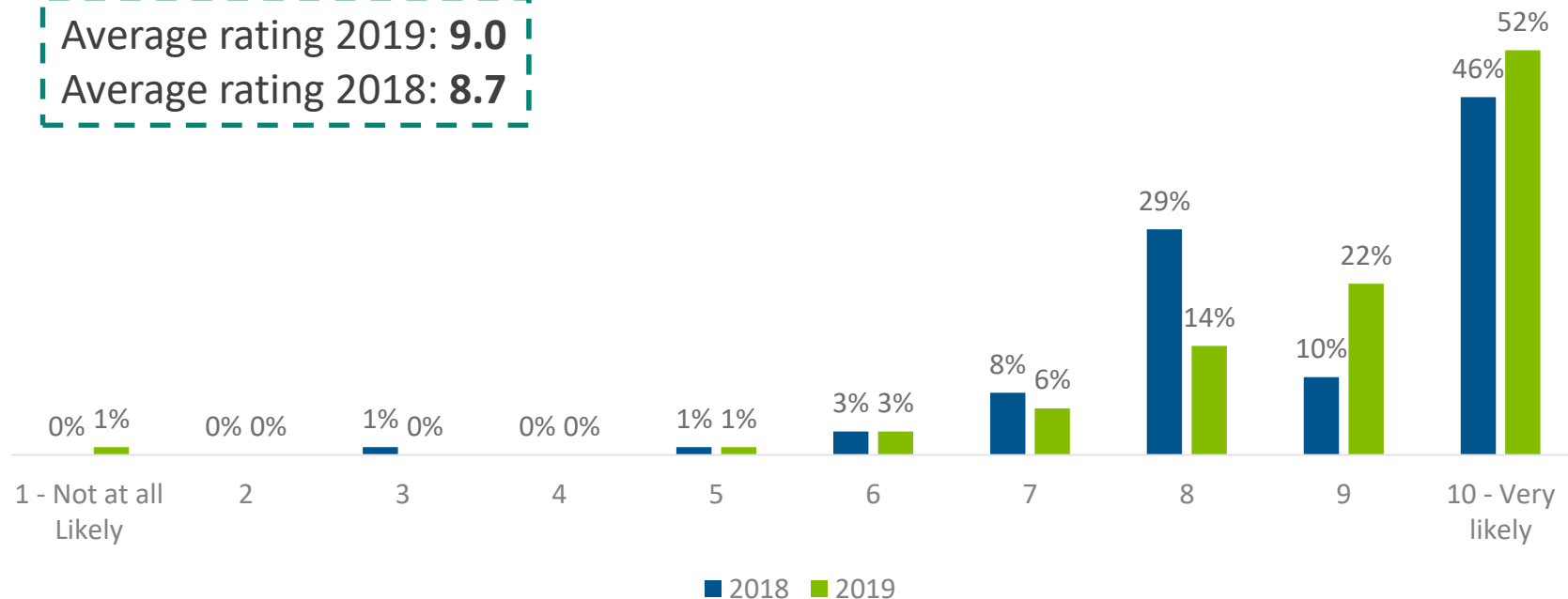
- 1 - Not at all likely
- 2
- 3
- 4
- 5 - Very likely

## Attendees in 2019 were more likely to recommend the Royal National Mod to friends / relatives.

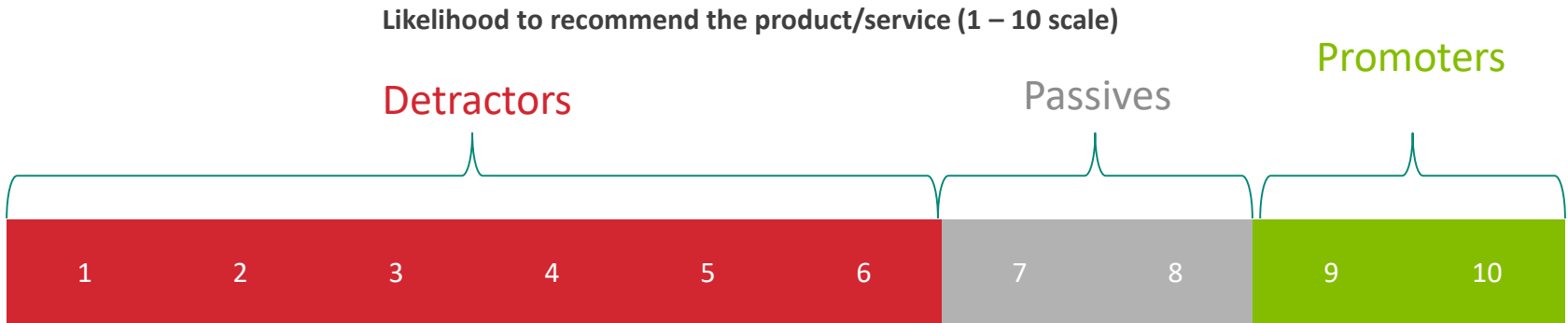


Average rating 2019: **9.0**

Average rating 2018: **8.7**



# Net Promoter Score is a common metric used in businesses to gauge customer loyalty and advocacy...



$$\text{NPS} = \% \text{ Promoters} - \% \text{ Detractors}$$
 (giving a score between -100 and 100)

This metric was devised based on evidence that few people use the lower end of the scale and thus accounts for this positive bias. Studies suggest that it is a better predictor of customer loyalty/repeat customers than a straightforward satisfaction score.

...and the Royal National Mòd has a very healthy score of 69.



Royal National Mòd, Glasgow 2019 NPS = **69**

Royal National Mòd, Dunoon 2018 NPS = **51**

We included this metric in the study as it may resonate with businesses and organisations that the Royal National Mòd / An Comunn Gàidhealach may approach.



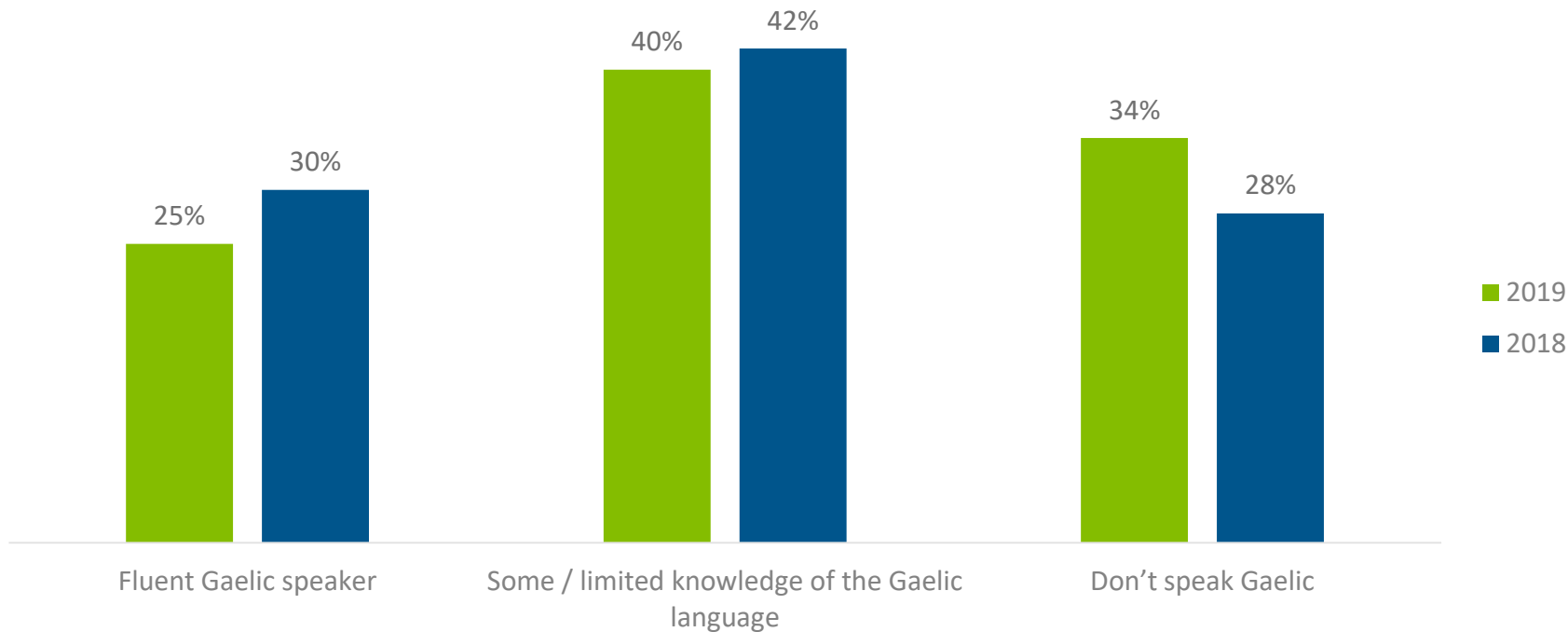
There were higher levels of satisfaction for the event in 2019. All aspects evaluated in the questionnaire tracked higher in 2019 compared to 2018. These findings bode well for 2020 as the event prepares to move north to Inverness.

It's likely the positive impact and impression of Glasgow has influenced high likelihood to attend next year's event – 75% indicated that they were either likely or very likely to attend. Similarly, the positive experience of 2019 is likely to have influenced an impressive NPS of 69. An NPS above 50 indicates very loyal and engaged customers, therefore, this finding highlights extremely strong customer support for the event.

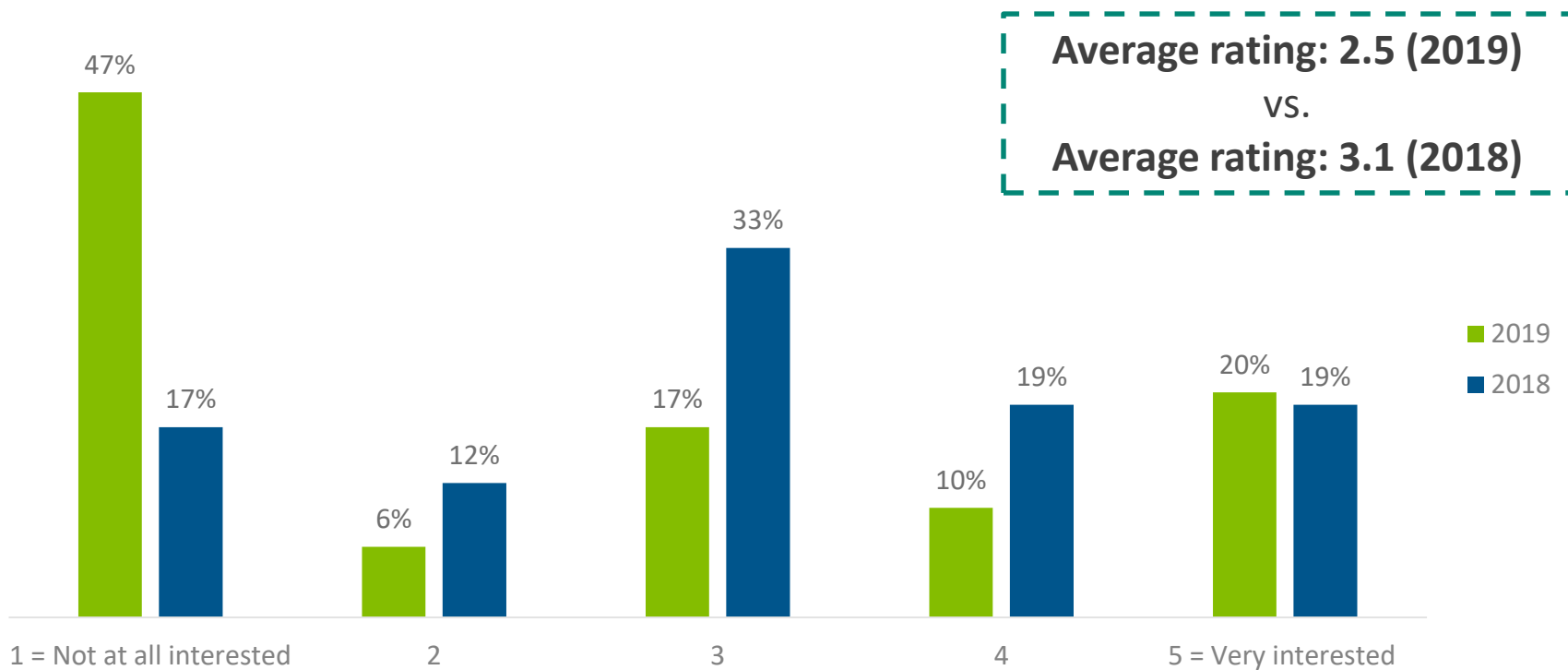


# Gaelic language & cultural assessment

As in 2018, there was a good spread of attendees by Gaelic language skills. In 2019, there were more non-Gaelic speakers.



# The audience in 2019 demonstrated notably lower interest in learning Gaelic.

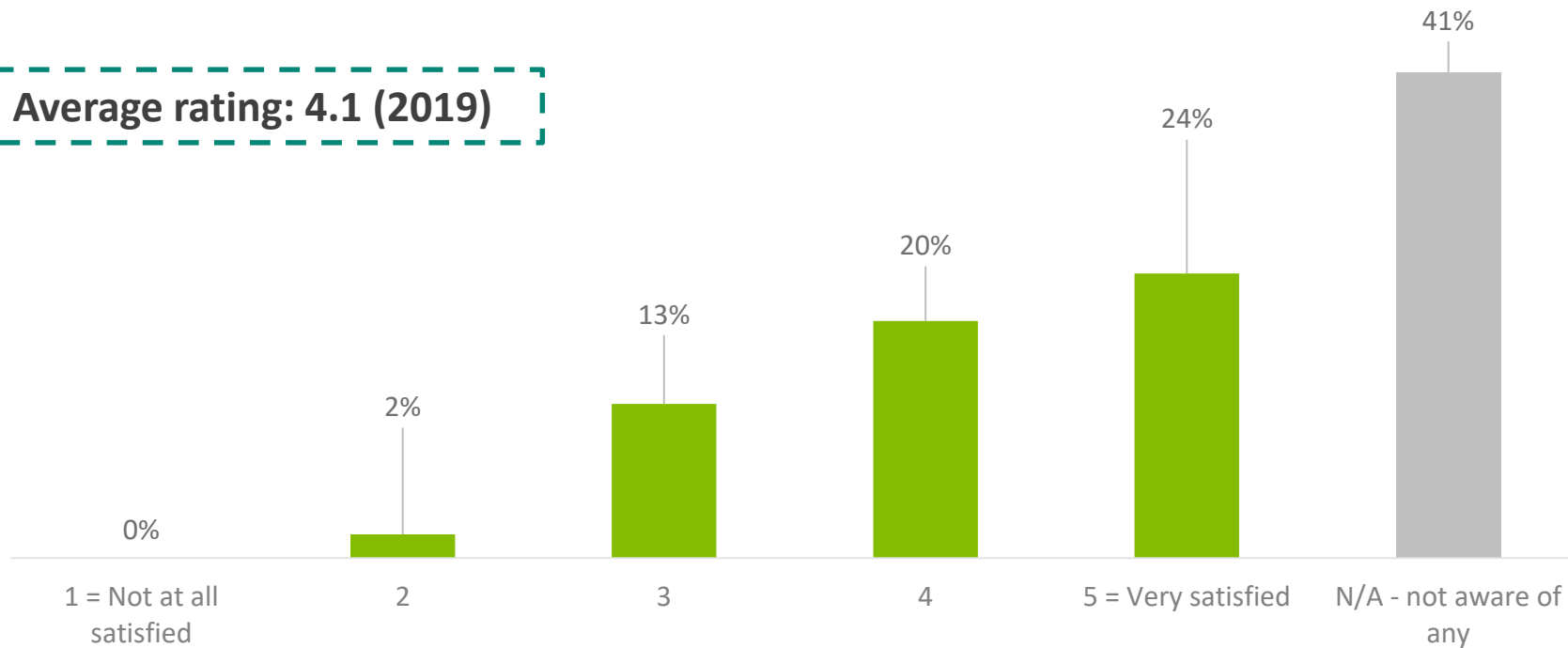




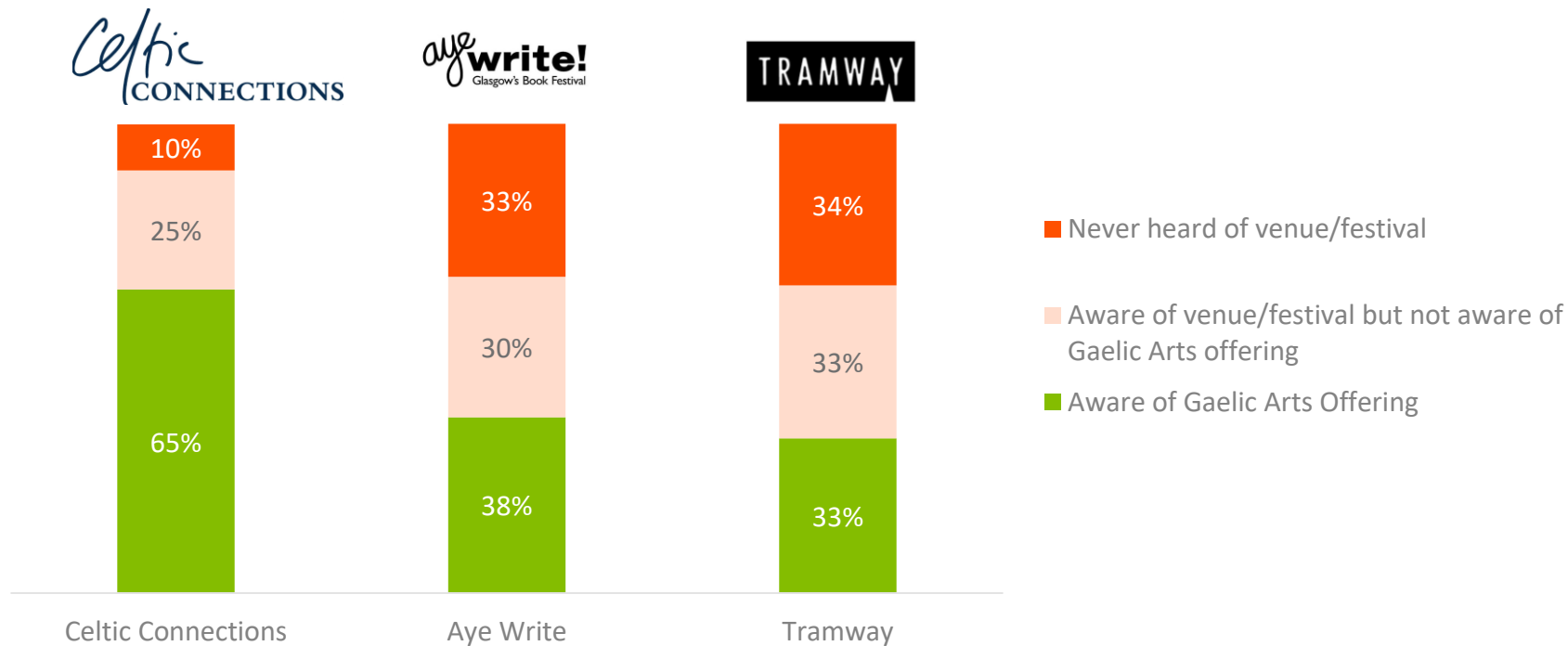
Those who were aware of the Gaelic Arts activities were satisfied with its offering, however almost half were not aware of any.



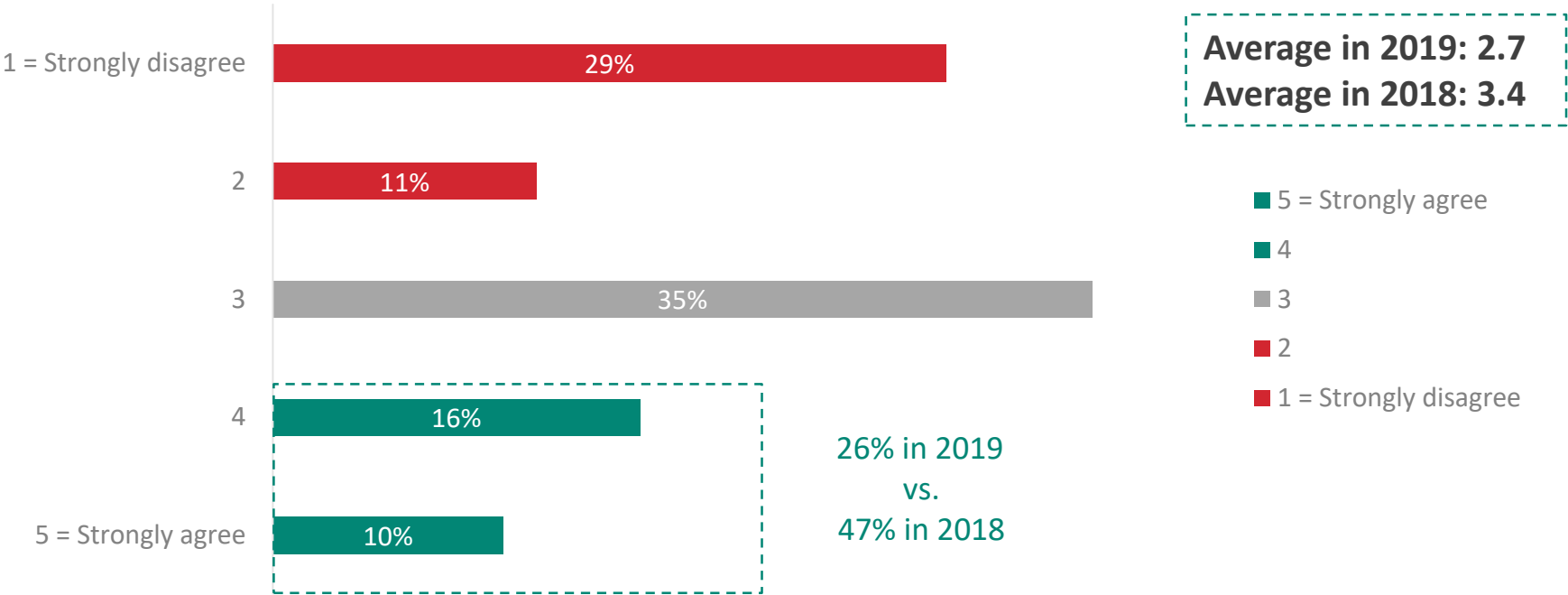
**Average rating: 4.1 (2019)**



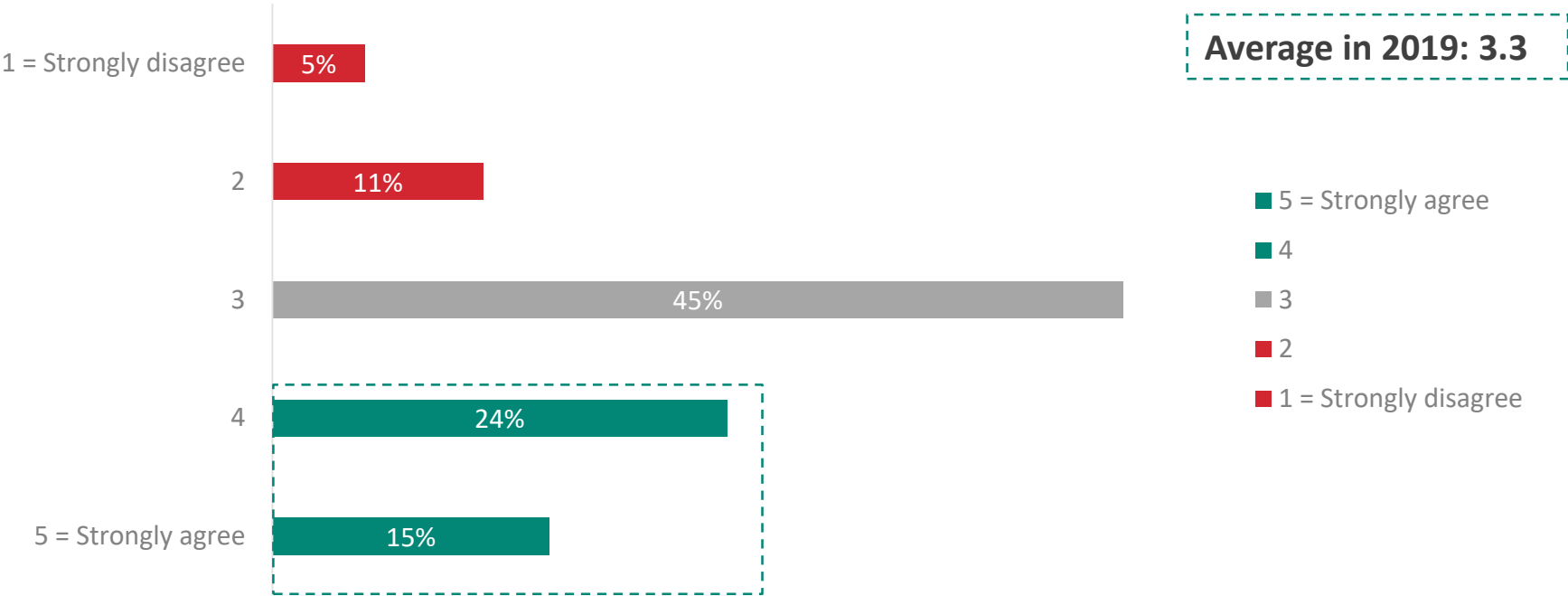
# Gaelic Arts awareness was highest for Celtic Connections and lowest at Tramway.



Demonstrating positive impact of the event, a quarter stated increased aspirations to improve their Gaelic, although this was much less than in 2018.

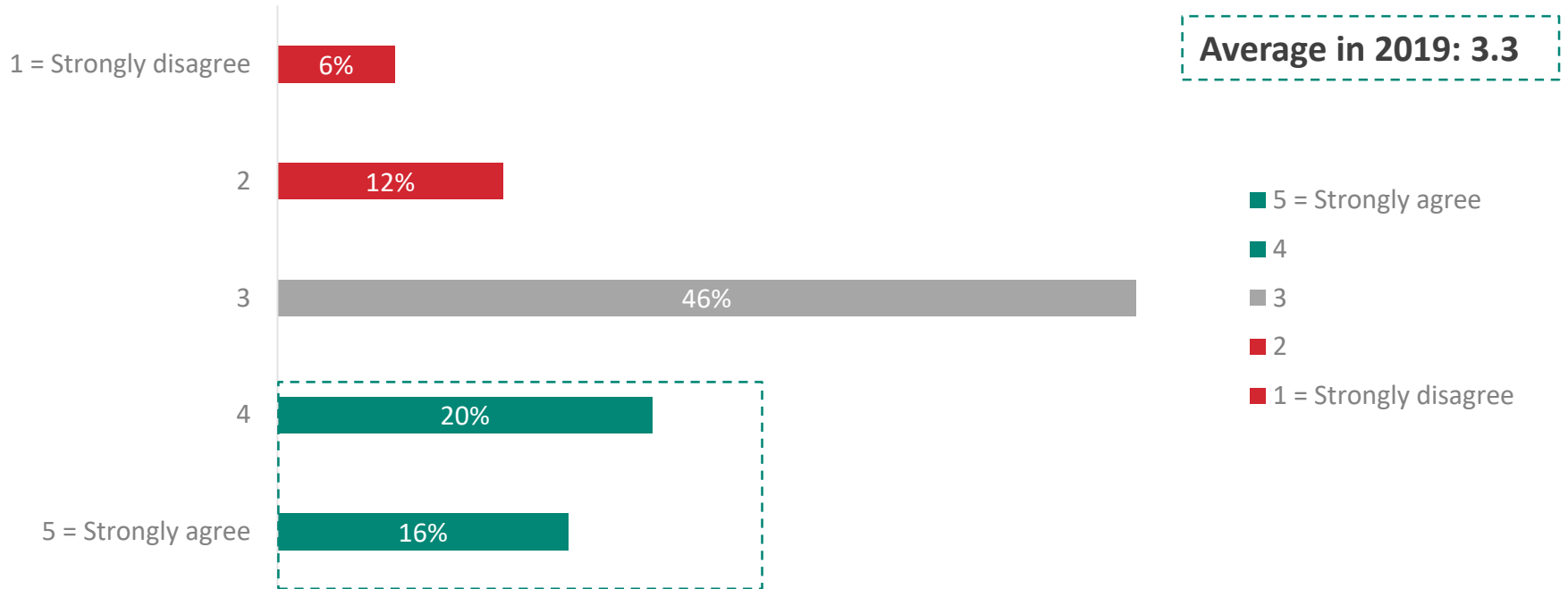


# Nearly two fifths said that the Mòd has inspired them to attend cultural events more frequently.

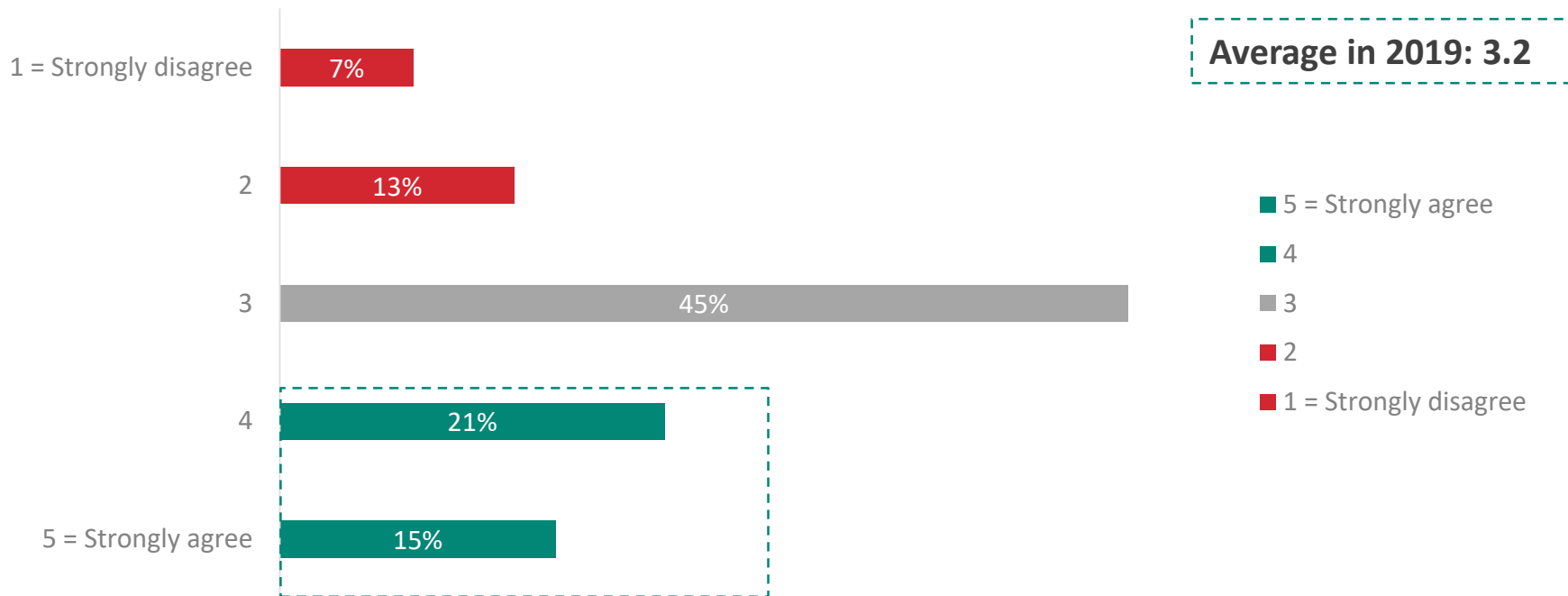


Q: To what extent do you agree or disagree with the following statements: Attending the Royal National Mòd inspired me to attend cultural events or activities more frequently than I normally do | Base: 224 in 2019

# Over a third said that the Mòd has increased their awareness of Gaelic Arts.



Similarly, over a third said that their understanding of Gaelic Arts had increased.





Supporting earlier findings and highlighting a broader base of attendees in 2019, the audience overall had lower Gaelic language skills compared to 2018.

Most likely a reflection of attendees being generally less experienced using the Gaelic language, there was evidence that the event had a lower impact in terms of raising interest to improve or inspire Gaelic learning.

That said, there was clearly evidence of impact of the event on Gaelic arts as c. 35% stated that the Mod had increased their awareness and understanding of Gaelic arts.



# Conclusions





The 2019 evaluation has highlighted again that the Mòd attracts a loyal and engaged customer base almost exclusively from within Scotland.

With the event being hosted in Glasgow there a broader base of attendees who came to the event compared to 2018. Attendees were less likely to have advanced Gaelic language skills and also were less likely to be part of the ‘entourage’ of competitors. This bodes well for the event in helping to diversify audiences and generate increased awareness of Gaelic arts.

Likely a reflection of the location of the event and its key venue (Glasgow Royal Concert Hall) – plus also the poor weather which afflicted Dunoon 2018 Mòd – attendees engaged with more events this year compared to 2018.

Satisfaction levels were higher too which again bodes well for the future development of the event. This finding was underlined by a very impressive NPS of 69 highlighting excellent engagement and loyalty among attendees. There are opportunities for Comunn Gàidhealach and its partners to leverage this positive sentiment in planning and executing next year’s event in Inverness.



# Economic Impact Assessment

# Summary

Total attendance	12,306
Eligible attendance (unique visitors excluding juniors and duplications)	10,025 (8,633)
Total Direct Expenditure from visitors to the event	£2,983,277
Additional Direct Expenditure after displacement and deadweight	£2,861,691
Pre and post event and organiser direct expenditure	£606,472
Direct accommodation expenditure outside the City of Glasgow	£180,055
Grand total of all direct expenditure including pre, post and organiser spend	£3,288,108
FTE supported as a result of direct expenditure	42
Type I multiplier impact on direct and indirect expenditure	£3,985,658
Employment supported after Type I multiplier impact and taxation impact	57

# Attendance Figures



- The total number of attendees, derived from organiser figures, was agreed to be **12,306** which includes an estimated **2,281** young people (also derived from organiser attendance figures) who participated in the junior events.



- Discounting duplicates and analysis of the reconciled attendance figures leaves **10,025** as the eligible audience and **8,633** as the unique visitor number

# Direct Expenditure



- Overall, the Mòd generated around **£2.98m** of visitor direct expenditure in the City of Glasgow during the event.



- The Mòd generated around **372k** of *additional* direct expenditure in the City of Glasgow from staying visitors prior to and following the event



- Including estimated organiser spend of around **£235k** in the City of Glasgow, pre and post stays, the Mòd generated around **£3.6m** of total direct expenditure



- This represents *additional* expenditure of around **£3.3m** in the City of Glasgow after displacement, deadweight and organiser expenditure is considered

# Additional Direct Expenditure



Additional Visitor spend  
at the event itself  
generated by the Mòd



Organiser expenditure in  
the Glasgow area



Estimated Pre and post  
visitor expenditure by  
visitors to the Mòd

## Additional Expenditure - direct visitor spend

	% Additionality	Added Value
% additional to Glasgow	81.6%	£2,464,217
% additional to Scotland	61.1%	£1,845,143
% Deadweight in Glasgow City	18.3%	£552,637

# Accommodation Expenditure

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<b>Total Estimated Accommodation Spend</b>	<b>£1,000,305</b>
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% Spend Outside City of Glasgow	18%
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Wider area impact	£180,055
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<b>Net Accommodation Spend in City of Glasgow</b>	<b>£820,250</b>
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# Pre and Post Mod Expenditure

<b>% staying pre Mòd</b>	<b>12.6%</b>
Number staying pre-Mòd	1,088
Average expenditure per visitor (average from Mòd staying visitors only)	£177
Nights pre-Mòd	1.33
Total Expenditure pre-Mòd	£256,042
<b>% staying post Mòd</b>	<b>5.4%</b>
Number staying post Mòd	466
Average expenditure per visitor (average from Mòd staying visitors only)	£177
Nights post Mòd	1.40
Total Expenditure post Mòd	£115,508
<b>Total pre and post stay expenditure</b>	<b>£371,550</b>

# Additional Direct Expenditure – Glasgow City

<b>Direct Expenditure after displacement and deadweight</b>	<b>£2,464,217</b>
Less accommodation spend elsewhere	(£180,055)
<b>Net Direct Expenditure</b>	<b>£2,284,162</b>
Pre and Post Mòd Direct Expenditure	£371,550
<b>Organiser Spend</b>	<b>£234,922</b>
<b>Grand Total</b>	<b>£2,890,634</b>

# Summary of Direct Expenditure

• Total Direct Expenditure	£2.98m
• Net Direct Expenditure after displacement, leakage and deadweight	£2.46m
• Net Additional expenditure including pre and post visits and organiser expenditure	£2.89m

# Multiplier Analysis



- After application of Type I multiplier, it is estimated that the Mòd created around **£4.0m** of direct and indirect expenditure throughout the wider economy.

# Employment Impact

Direct Expenditure After Tax	£2,386,621
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Employment multiplier (2016 ScotGov value)	£70,240
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FTE	42
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Type I Multiplier (2016 ScotGov value)	1.67
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D+I after Type I impact	£3,985,658
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Total FTE	57
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# Employment Impact

The Mòd supported around **42 FTE** jobs through *total* direct expenditure during the event.

And supports up to a further **57 FTE** jobs elsewhere in the economy as a result of the Type I multiplier effect.

# Return on Investment



- The main funders of the event – Glasgow Life and Bòrd na Gàidhlig – achieved Returns on Investment (RoI) of 19:1 and 30:1 respectively.

# Return on Investment

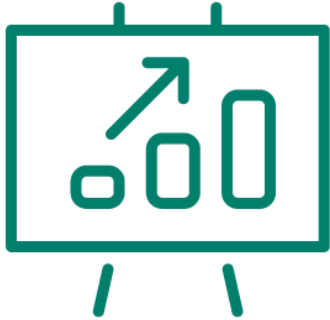
Organisation	Funding	Return on Investment
Glasgow Life	£150,000	19
Bòrd na Gàidhlig	£95,000	30
Commercial Income	£53,150	54
Scottish Government	£50,000	58
Sponsorship	£35,000	83
Local Committee	£31,250	93
Event Scotland	£20,000	145
BBC Alba or Scotland	£14,206	203



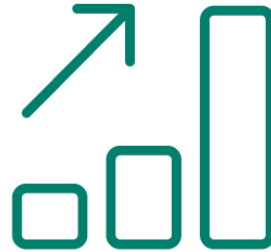
# Likelihood to Return

Percentage likely or very likely to return to Glasgow	61%
Number of Likely returners	5,283
Average spend per staying visitor per night (based on survey)	£177
Overnight stay (average stay post Mod)	1.40
Potential Direct Expenditure from returners	£1,185,655

# Comparison with Dunoon 2018



The scale and impact of the Glasgow Mòd was **significantly** greater.



With better RoI for its main funders!



...And a higher likelihood to generate future business

# Comparison with Dunoon 2018

	2018	2019
Eligible Audience	6,063	10,025
Total Direct Visitor Expenditure	£1,537,668	£2,983,277
Staying Direct Visitor Expenditure	£1,297,543	£2,388,580
Non staying Direct Visitor Expenditure	£240,125	£594,697
Type I Multiplier Impact	£2,054,324	£3,985,658
Accommodation spend	£508,315	£1,000,305
Employment supported from Direct Expenditure	22	42
Type I FTE Multiplier Impact	29	57
RoI – Local authority	13	19
RoI – Event Scotland	75	145
RoI - Scottish Government	75	58

# Comparison with Dunoon 2018

	2018	2019
Expenditure per visitor	£254	£346
Expenditure per visitor – staying visitors	£214	£277
Expenditure per visitor – non staying visitors	£40	£69
Accommodation spend per staying visitor	£168	£234
% of 1 FTE supported per visitor	0.36%	0.42%
Likelihood to return to destination	37%	61%

# Conclusions



- The Mòd was, a highly popular event in Glasgow
- It creates a significant economic impact for the host community



- With a high level of expenditure
- Return on Investment is high
- Overall impact is significantly higher than in Dunoon in 2018



- There is benefit for areas beyond the immediate City of Glasgow
- There is a high level of likelihood to return to Glasgow

# Thank You!



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