

Agenda Item	5
Report No	G/2/26

The Highland Council

Committee: Gaelic

Date: 25 February 2026

Report Title: Economic, Linguistic and Cultural Benefits of the Lochaber Royal National Mòd 2025

Report By: Assistant Chief Executive - People

1. Purpose/Executive Summary

- 1.1 The purpose of the report is to give an overview to Elected Members of the economic benefits of the Royal National Mod 2025 in the Lochaber Area which took place between 10-18 October 2025.
- 1.2 The Director Mr James Adam, Tourism Resources Company was commissioned on behalf of ACG to draft Economic Impact Report on the Royal National Mòd. The report was launched on 19 January 2026. Mr Adam will give a detailed presentation which will highlight key aspects and points in relation to the findings and outcomes of the report. (**Appendix 1**)
- 1.3 The President of ACG Mrs Maggie Cunningham, Interim Chief Executive Mrs Peigi MacIennan, and the Chair of the Lochaber Mòd Local Organising Committee Mr Iain Robertson (voluntary position) will be present.

2. Recommendations

- 2.1 Members are asked to:
 - i. discuss and note the details included in the presentation and within the report;
 - ii. note that the 2029 Mòd will take place in the Highland area; and
 - iii. agree that Officers liaise with ACG Officials to prepare a refreshed Service Delivery Agreement.

3. Implications

- 3.1 Resource
The Highland Council are currently planning for the 2029 Mòd which will take place within the Highland area.
- 3.2 Legal
Currently there are no legal implications

- 3.3 Risk
Resources may present a risk due to the impact of inflation on event costs. Despite this, the Mòd remains a strong economic and linguistic driver with a positive track record of attracting investment and stakeholder backing.
- 3.4 Health and Safety (risks arising from changes to plant, equipment, process, or people)
There are currently no risks relation to the above
- 3.5 Gaelic
The Mòd had a hugely positive implication for Gaelic and culture in the Lochaber area as it delivered a strong economic boost, advanced Gaelic usage, youth engagement, cultural collaboration, intergenerational language transmission, new innovative projects, community engagement and gave the Lochaber area a world-wide profile through the media, creative industries and social media platforms.
- 3.5.1 The Mòd also aligns with the priorities in the Gaelic Language Plan as per the following:
- Strategic Priority 1.1 - Increase support for all Gaelic users and learners, in their communities, and in the networks in which they operate.
 - Strategic Priority 2.1 - Gaelic Media and Arts output – create opportunities for expression, skills, access, participation and creativity.
 - Strategic Priority 3.1 - Use Gaelic in businesses and social enterprises, and as an economic asset in Scotland.

4. Impacts

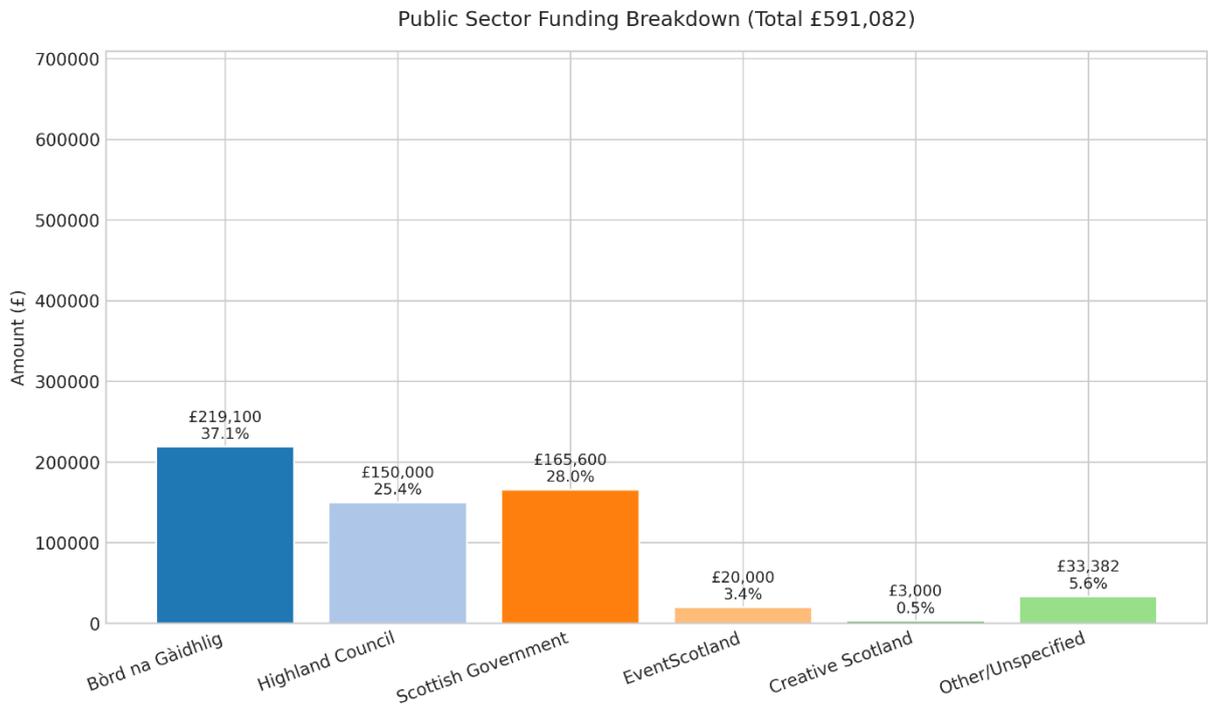
- 4.1 In Highland, all policies, strategies or service changes are subject to an integrated screening for impact for Equalities, Poverty and Human Rights, Children’s Rights and Wellbeing, Climate Change, Islands and Mainland Rural Communities, and Data Protection. Where identified as required, a full impact assessment will be undertaken.
- 4.3 This is a monitoring update report and therefore an impact assessment is not required.

5. Economic Benefits

- 5.1 The Lochaber Royal National Mòd 2025 delivered a significant economic uplift to the area, generating an estimated £3.9 million in economic benefit which has been evidenced as a significance performance. This impact came through increased visitor spending, additional employment, and sustained activity across Gaelic, cultural, hospitality, retail, and the transport sectors.
- 5.2 The Mòd and associated Fringe Programme attracted over 9,400 attendees, marking a 4% increase from 2024, and sustained Lochaber's reputation as an excellent host destination for the Mòd and indeed other Gaelic cultural events. According to the research findings, 69 full-time equivalent jobs estimated to have been created from the event’s staging in the area.

6. Funding

6.1 The Lochaber Mòd was supported by Highland Council, EventScotland (VisitScotland) Bòrd na Gàidhlig, The Scottish Government, Caledonian MacBrayne, BBC ALBA, CreativeScotland and SQA.



Highland Council funding noted as £37,500 per year over 4 years (total £150,000).
Difference between listed sources (£557,700) and total (£591,082) shown as 'Other/Unspecified' (£33,382).

- 6.2 The Gaelic Team liaised with ACG Chief Executive regarding submission of an application to the Community Regeneration Fund for the Lochaber Area. The application was successful with support of £9,867.55 which supported the cost of the hiring of a Mòd Marquee (An Tenta Mhòr).
- 6.3 A request from a local Community Council and an Elected Lochaber Area Member was submitted to the Gaelic Team. The Gaelic Officer liaised with the Chair of both the Community Council, and the Chair of the Local Committee in-order to submit a funding application to the Area Committee for to acquire funding to support additional ferry services from Ardgour Loch Alainn to Fortwilliam.
- 6.4 The funding applications had no implication on the current Gaelic funding; this had a positive impact as this mainstreamed Gaelic and culture and the current outcomes across the area.
- 6.5 The applications incorporated, took cognisance of the Gaelic Language Plan, the Lochaber Local Area Plan, and social inclusion in relation to rurality, travel and connectivity challenges for to ensure social and cultural engagement. The funding applications' criteria recognised the Mòd as an economic, cultural and linguistic event driver.

7. Strategic and Operational Level Support.

- 7.1 ACG strategically manage the Mòd, with operational support from the Local Mod Committee which is a committee of volunteers.
The Gaelic Team established a Mòd Liaison Group (MLG) for management and coordination across all relevant Council services.
MLG included Elected Members, Officers from Service Teams including Legal (licencing), Roads, Planning, Corporate (Comms), Education, Traffic, Transport HLH, PoliceScotland, TransportScotland, and the Chamber of Commerce.
MLG chaired by Local Mod Committee Chair and supported by the Gaelic Team.
- 7.1 The Gaelic Team are revisiting the current SDA between the Highland Council and ACG. A timetable for the operational and strategic review is being developed with the aim of the SDA to be agreed by the Council at end of November 2026.
The timeline allows for;
- a) Members' input and expectations
 - b) Vision for the 2029 Mòd
 - c) Taking account of the need, in accordance with the funding being allocated as part of governance, audit and best value requirements.

Designation: Assistant Chief Executive - People

Date: 28 January 2026

Author: Morag Anna MacLeod Mitchell, Gaelic Development Officer

Background Papers:

Appendices: **Appendix 1** – The full report which was commissioned by ACG



TOURISM
RESOURCES
COMPANY

Tourism Resources Company
Management Consultancy & Research Services

Royal National Mòd 2025

Evaluation

November 2025

TOURISM RESOURCES COMPANY

Management Consultancy and Research Services

20 FINTRY CRESCENT, BISHOPBRIGGS, GLASGOW G4 1SH

Tel: 0141-353 1143

Email: info@tourism-resources.co.uk

www.tourism-resources.co.uk

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1 INTRODUCTION

This report provides an evaluation of the Royal National Mòd 2025.

1.1 Background

The Royal National Mòd is organised by An Comunn Gàidhealach (The Highland Association) which was founded in Oban in 1891. Famous for celebrating Gaelic linguistic and cultural heritage, Scotland's premier Gaelic festival provides opportunities for people of all ages to perform across a range of competitive disciplines including Gaelic music and song, highland dancing, instrumental, drama, sport and literature. This year's Festival took place from the 10th to 18th October 2025 in Fort William.

1.2 Objectives

The objectives of the evaluation are to allow the Client to report back to funders, assess the economic impact of the Festival and to gather feedback to inform future delivery.

1.3 Funding

Total public sector funding was £591,082 comprising:

- Bòrd na Gàidhlig (£219,100);
- Highland Council (£150,000);
- Scottish Government (£165,600);
- EventScotland (£20,000); and
- Creative Scotland (£3,000).

1.4 Report Structure

The remainder of this report is structured as follows:

- Chapter 2: Survey Results;
- Chapter 3: Economic Impact Assessment; and
- Chapter 4: Conclusions.

2 SURVEY RESULTS

2.1 Introduction

This Chapter provides analysis of the visitor survey, which was conducted online after the event. A total of 463 surveys were completed, giving a standard error of +/-4.4% (robust for economic impact purposes).

2.2 Visitor Profile

A total of 73% of adult visitors were female, 27% male and 1% identify in another way. The table below outlines the age range of adult visitors with the most common age groups being 55-64 (26%) and 65-74 (22%).

Age Range of Adult Visitors	
Age Bands	%
16-25	4%
26-34	5%
35-44	14%
45-54	19%
55-64	26%
65-74	22%
75+	9%
Total	100%

2.3 Awareness of Event

How people found out about the Mòd 2025 is given in the table below.

How They Found Out About The Mòd 2024	
Sources	%
Have always known about the Mòd	63%
Have attended the Mòd previously	61%
Word of mouth	32%
An Comunn Website	25%
Social media	21%
Mòd competition online programme	16%
Mòd competition printed programme	12%
Mòd fringe online programme	11%
Radio/television	10%
Mòd fringe printed programme	8%
Newspaper/magazine	4%
Other website	2%
Other	2%
I was passing by	<1%

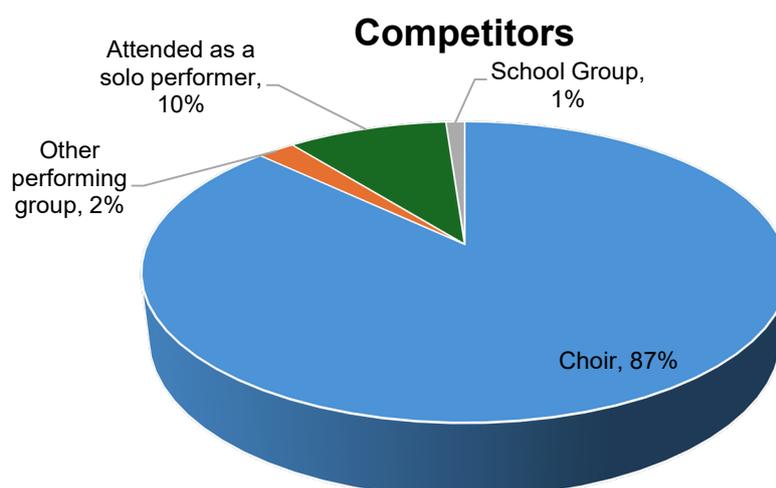
The most common ways of finding out were having always known about the Mòd (63%), attended previously (61%), word of mouth (32%), An Comunn website (25%) and social media (21%).

The most common ways to buy tickets were online (52%) and at venues during the event (42%). Those stating 'other' were where someone else had bought the tickets.

Main Method for Buying Tickets	
Method	%
Online	52%
At venue(s) during the event	42%
At venue(s) in advance of event	6%
Other	1%
Total	100%

2.4 Competitors

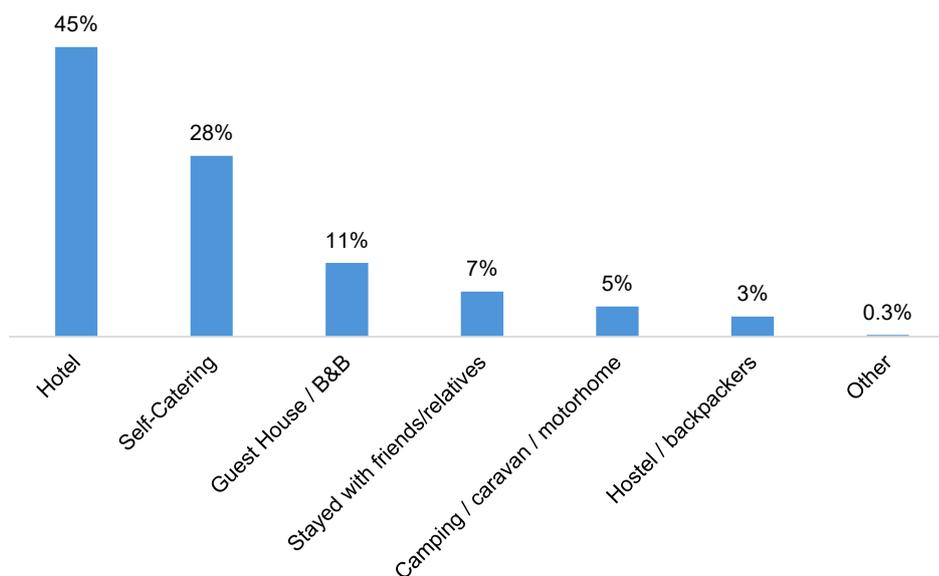
A total of 39% of respondents competed at the Mòd 2025. A total of 87% were part of a choir and 10% were a solo performer.



2.5 Accommodation

Of those who required an overnight stay, the most common types of accommodation were hotel (45%), self-catering (28%) and guest house/B&B (11%).

Type of Accommodation



2.6 Rating of Event

Ratings for different aspects of the event are given in the table below.

Rating of the Event					
	Very Good	Good	Average	Poor	Very Poor
Organisation	58%	31%	8%	3%	<1%
Competition venues	50%	40%	9%	2%	<1%
Information	43%	40%	14%	3%	<1%
Mòd Fringe events	57%	36%	5%	1%	-
Buzz / overall atmosphere	68%	25%	4%	2%	1%

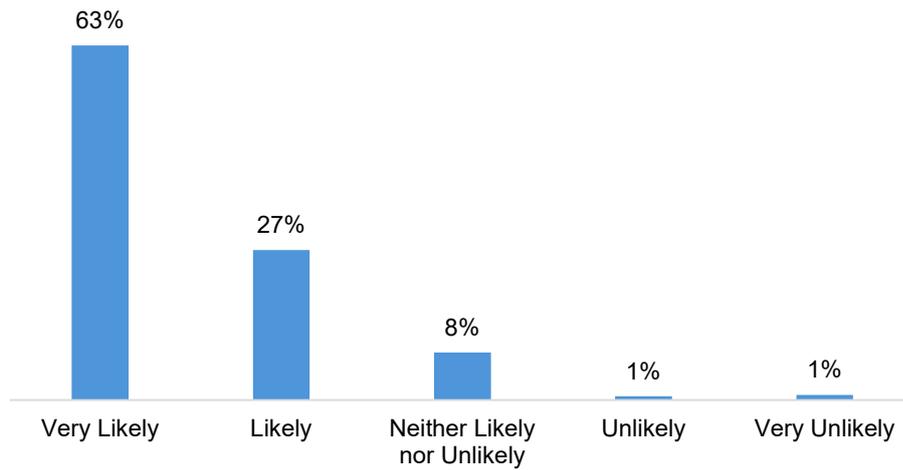
The event is highly thought of with ratings of very good/good for fringe events (94%), atmosphere (93%), competition (90%), organisation (89%), and information (83%).

The most commonly suggested improvements to the event in the future were:

- To do something about the overrun in some events (8%), the comment was most often around children’s events;
- More aspects in English (2%); and
- Late night opening of pubs (2%).

A total of 90% stated that they were very likely/likely to recommend the Mòd to friends/family.

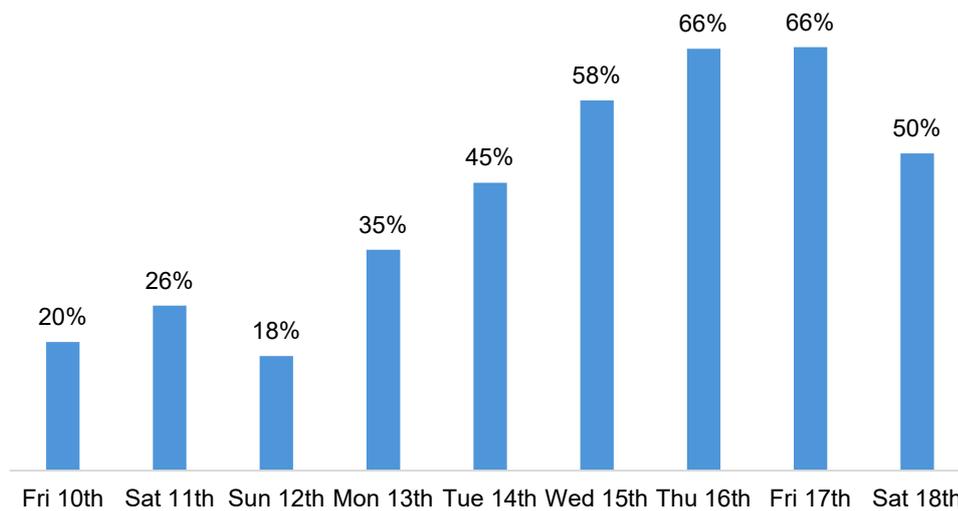
Recommend the Mòd to Freinds/Relatives



2.7 Visitor Attendance at the Event

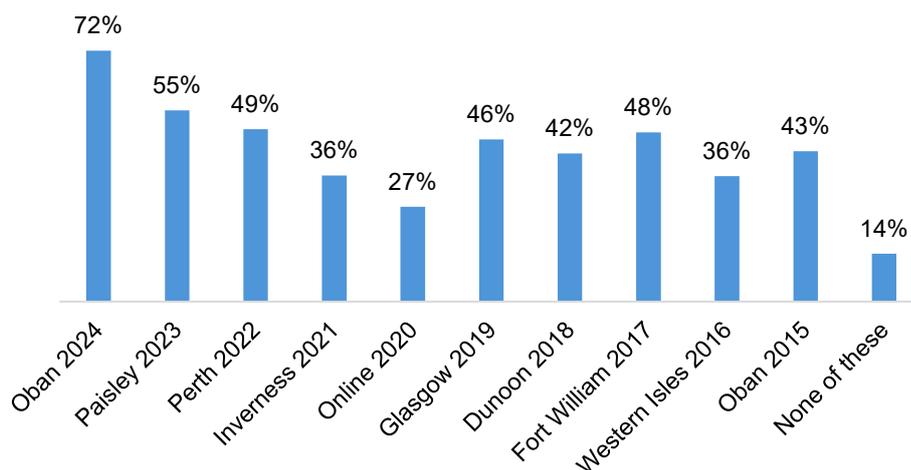
Larger proportions attended later in the week.

Days Attended



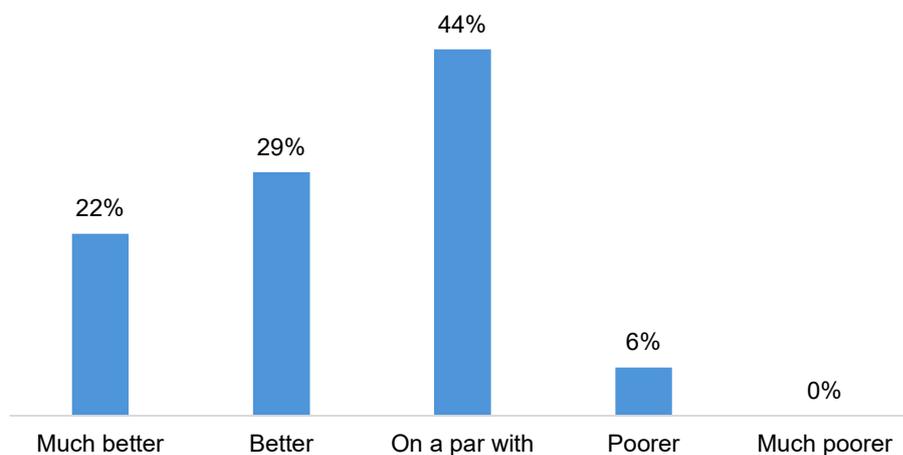
A total of 86% had attended at least one previous Mòd in the last 10 years.

Attendance at previous Mòds



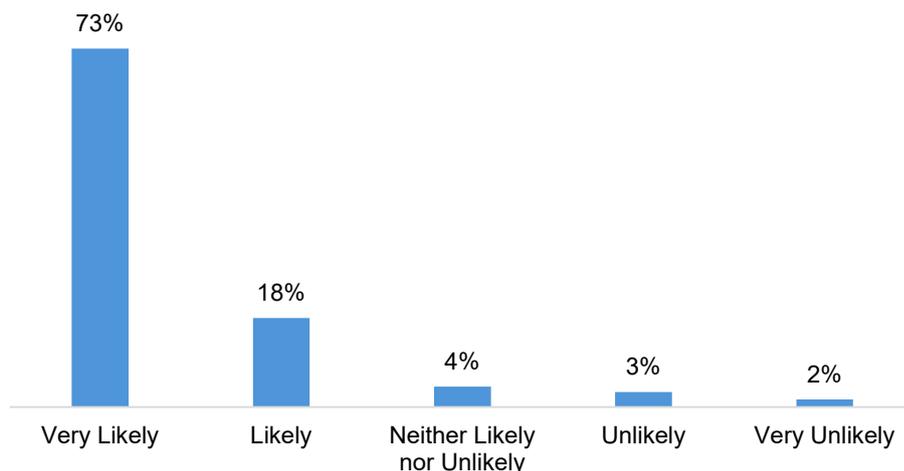
Of returning visitors, just over half (51%) considered this year’s event as much better/better, with 44% reporting it was of the same quality as in previous years.

Mòd 2025 compared to previous years



A total of 91% stated that they are very likely/likely to attend the Mòd 2026 in Glasgow.

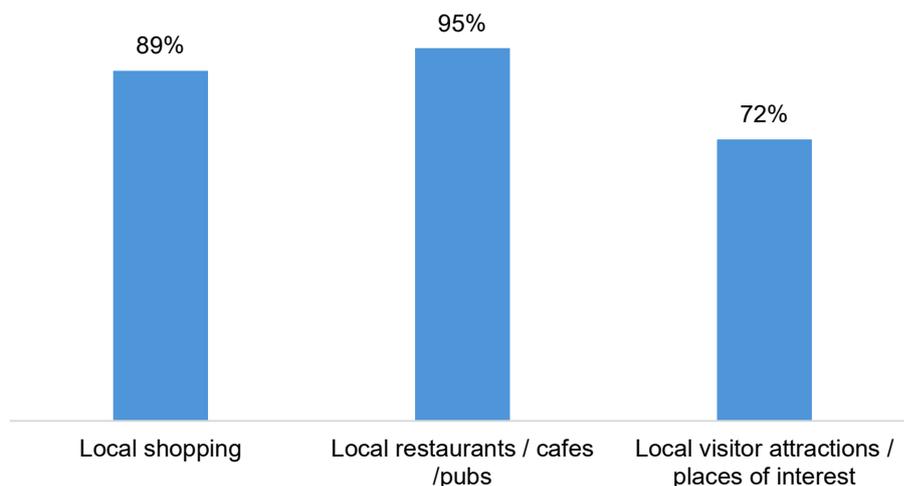
Attend next year's Mòd in Glasgow



2.8 Fort William Aspects Engaged With

A total of 95% visited local restaurants/cafes/pubs, 89% local shops and 72% local visitor attractions/places of interest.

Fort William Aspects Engaged With



2.9 Rating of Fort William

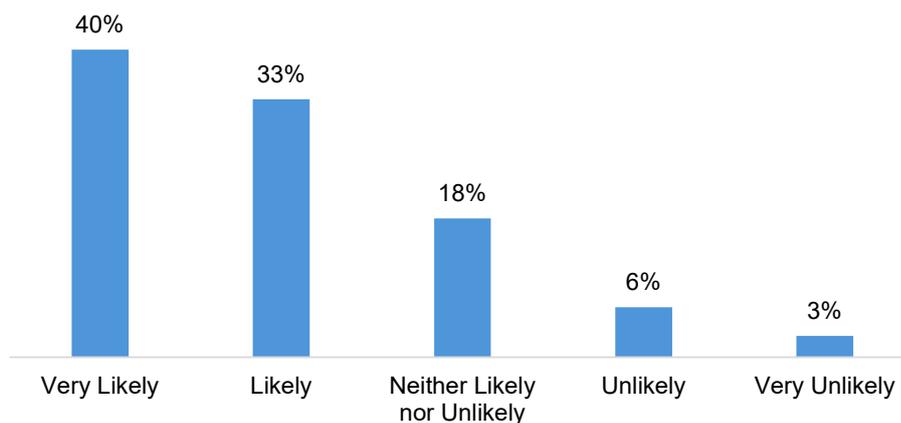
Ratings for different aspects of Fort William are given in the table, over.

Rating of Fort William					
	Very Good	Good	Average	Poor	Very Poor
Fort William as host destination	61%	30%	7%	2%	-
Local shopping	23%	44%	26%	6%	1%
Local restaurants/cafes/pubs	36%	46%	15%	3%	<1%
Accommodation	40%	38%	18%	2%	1%
Local visitor attractions/ places of interest	42%	43%	13%	1%	<1%

Fort William is highly thought of with 91% rating it very good/good as a host destination. Different aspects are also highly rated as very good/good including local visitor attractions/places of interest (85%), local restaurants/cafes/pubs (82%), and accommodation (78%). The rating of local shopping is a little more mixed (67%).

A total of 73% said they were very likely/likely to return to Fort William for a future leisure visit.

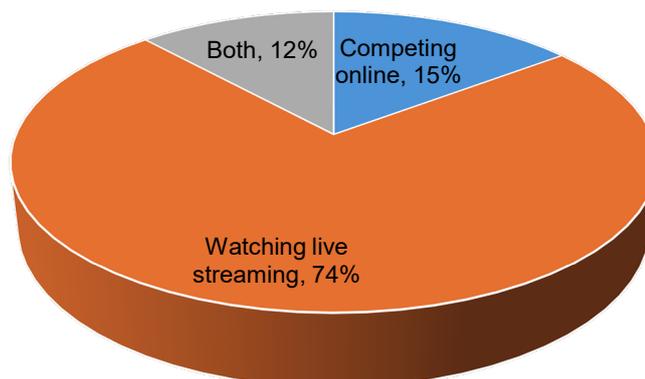
Return to Fort William for a Future Leisure Visit



2.10 Online Participation

For those engaging online, 15% competed online, 74% watched live streaming and 12% did both.

Online Participation



A total of 61% would have taken part in the Mòd anyway, even if it hadn't been available online.

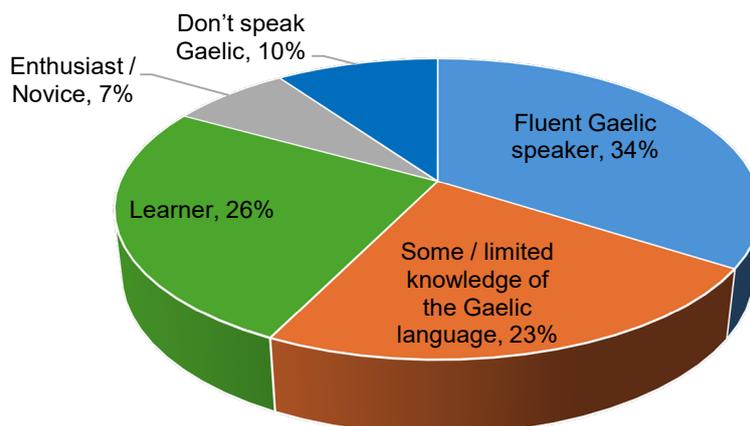
Engaging Online	
	%
Made me want to go to the Mòd in 2026	83%
Allowed me to participate even though I could not travel to Fort William	25%
Allowed our local group / choir to take part even though we could not travel to Fort William	4%

Engaging online made 83% want to go to the Mòd in 2026. For a quarter it allowed them to participate and for 4% their local choir to participate.

2.11 Gaelic Skills and Social Impacts

All respondents were asked about their Gaelic language skills. A total of 34% of respondents considered themselves to be a fluent Gaelic speaker, with 23% stating that they had some/limited knowledge.

Gaelic Language Skills



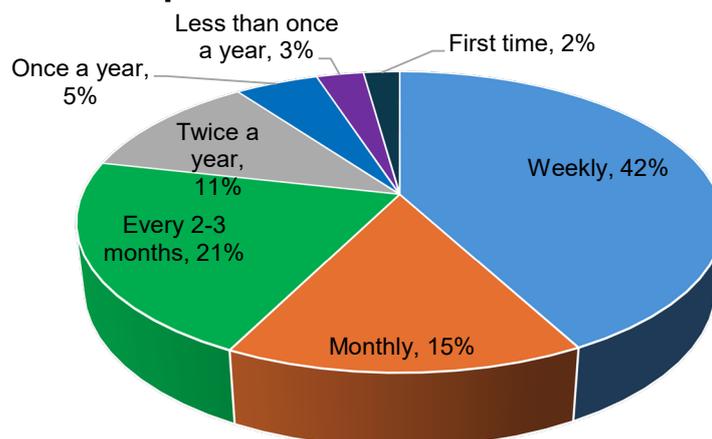
A further 26% described themselves as a learner and 7% as an enthusiast/novice. Only 10% said that they did not speak any Gaelic.

Mòd Impacts on Gaelic					
	Strongly agree	Agree	Neither Agree/ Disagree	Disagree	Strongly disagree
Encouraged me to improve my Gaelic language skills	33%	39%	23%	3%	2%
Increased my awareness of Gaelic arts	27%	37%	32%	3%	1%
Increased my understanding of Gaelic arts	25%	36%	35%	3%	2%
Encouraged me to use Gaelic more often	36%	35%	23%	5%	2%
Enhanced my Gaelic skills	26%	35%	31%	6%	3%
Led me to believe more strongly that Gaelic is important in Scotland	53%	30%	15%	1%	1%

The Mòd has led 83% to believe more strongly in the importance of Gaelic. It has encouraged 71% to improve their Gaelic language skills and 70% to use Gaelic more often. For 64% it has increased their awareness and 60% their understanding of Gaelic arts. For 60% it has enhanced their Gaelic skills.

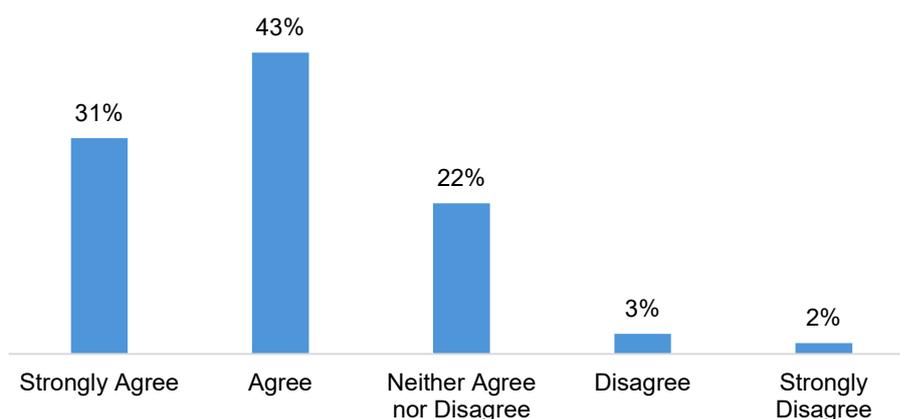
How often respondents participate in Gaelic cultural events/activities is given in the figure, over.

Participation in Gaelic Events/Activities



Just under four-fifths (79%) participate at least once every three months. The Mòd has inspired just under three-quarters (74%) of respondents to attend Gaelic events/activities more frequently.

Inspired me to attend Gaelic events / activities more frequently



The Mòd is beneficial to the mental health of 73%, encourages 80% to engage socially and for 83% is a great way to meet friends.

Health and Social Impacts					
	Strongly agree	Agree	Neither Agree/ Disagree	Disagree	Strongly disagree
Been beneficial to my mental health	36%	37%	23%	2%	1%
Encouraged me to engage socially	40%	40%	18%	1%	1%
Been a great way to meet friends	52%	31%	14%	2%	1%

2.12 Other Comments

Respondents were asked if there were any other comments they would like to make about the event. The most common were:

- Fantastic/excellent/great event (17%);
- Well organised (12%);
- Marque/tent was great (8%);
- A number of events ran over/were late (8%); and
- Great buzz/atmosphere (6%).

3 ECONOMIC IMPACT ASSESSMENT

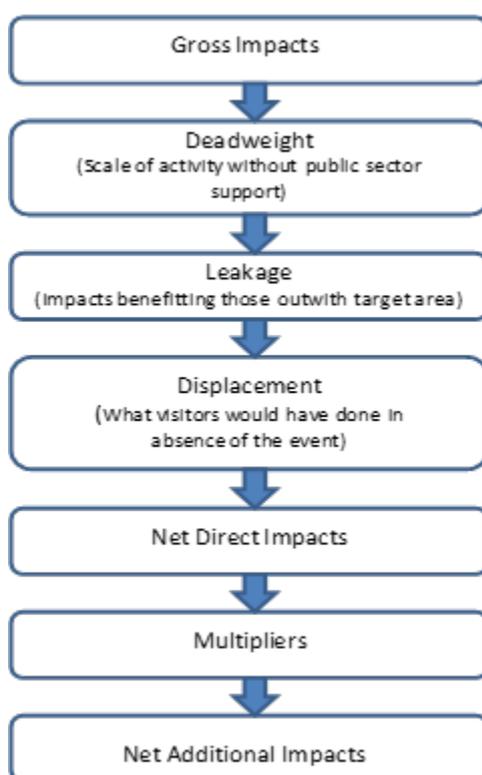
3.1 Introduction

This Chapter provides an assessment of the economic impact of The Mòd.

3.2 Economic Impact Assessment Method

The approach to the economic impact assessment is given in the figure below.

Economic Impact Assessment Method



3.3 Visitors

3.3.1 Visitor Numbers

The event organisers have provided us with the total number of competitors at the event which was 2,917. From the survey we can then calculate a ratio of competitors to spectators. This was 2.22, which equates to 6,487 spectators. This gives a total of 9,404 visitors.

Number of Visitors		
	Number	%
Day	1,766	19%
Overnight	7,638	81%
Total	9,404	100%

The pattern of spectator behaviour varies by day and overnight visitor, and by origin, therefore these have been analysed separately in order to derive the economic impact.

Visitors by Type and Origin		
	Day	Overnight
Highland	15.4%	19.5%
Elsewhere in Scotland	3.4%	54.6%
Elsewhere in UK	-	3.7%
Overseas	-	3.4%
Total	18.8%	81.2%

The most common origin for visitors was from Elsewhere in Scotland (58%). The most common local authority areas were Highland (35%), Argyll & Bute (9%), Comhairle nan Eilean Siar (9%), Glasgow (7%) and Edinburgh (5%).

3.4 **Expenditure**

The average daily expenditure for visitors is shown in the table below.

Average Daily Expenditure		
	Day	Overnight
Highland	£18.60	£106.17
Elsewhere in Scotland	£26.00	£115.32
Elsewhere in UK	-	£117.46
Overseas	-	£116.73

The average length of stay for overnight visitors is given in the table below.

Average Length of Stay	
	Highland
Highland	3.9
Elsewhere in Scotland	3.6
Elsewhere in UK	3.8
Overseas	3.4

Gross expenditure is calculated as follows:

$$Ge = ndv.edv + nov.eov.al$$

Where	Ge	gross expenditure
	ndv	number of day visitors
	edv	average daily expenditure of day visitors
	nov	number of overnight visitors
	eov	average daily expenditure of overnight visitors
	al	average length of stay

Applying the formula gives gross expenditure of £3,263,914.

3.5 **Gross to Net**

Calculating the net impact of the event, which is the true measure of the economic benefit to the local area, requires taking account of:

- Deadweight;
- Leakage;
- Displacement; and
- Multiplier effects.

Deadweight

The event required public sector funding for it to take place so the level of deadweight is zero.

Leakage

Expenditure that takes place outside the geographic area at which the economic impact is being assessed is leakage. The level of leakage has been considered throughout the calculation process, based on where the expenditure of visitors and the event organisers has taken place.

Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the economy to another (i.e. removal of casual visitors). The following information has been used from the survey to calculate the displacement levels:

- Visitor origin;
- Importance of the event in the decision to visit the area; and
- Counterfactual i.e. what visitors would have done in the absence of the event.

Displacement (%)	
Day	
Highland	84
Elsewhere in Scotland	7
Overnight	
Highland	80
Elsewhere in Scotland	3
Elsewhere in UK	13
Overseas	50

Taking account of leakage and displacement gives net direct additional expenditure of £2,400,322.

3.6 Before/After The Mòd

Some visitors stayed in the Highland area before and/or after the Mòd. Following the processes above gives net direct additional expenditure of £233,057.

3.7 Guests, Officials, Volunteers, Media and Traders

There is also expenditure from guests, officials, volunteers, media and traders¹ visiting the local area. Following the same processes as set out above gives net additional expenditure of £61,087.

3.8 Organiser's Expenditure

The event organiser's expenditure has been assessed on the basis of:

- The total income generated by the event and where it came from;
- Where the money was spent geographically; and
- The net effect of that expenditure on the economy.

¹ Temporary onsite traders.

The income for the event sourced from Highland was £183,296, whilst the expenditure in Highland was £245,808. The net organiser's spend in Highland was £62,512.

3.9 Total Net Additional Direct Expenditure

The total net direct additional expenditure is £2,756,978.

Net Additional Direct Expenditure	
Visitors	£2,400,322
Stay Before/After	£233,057
Guests, Officials, Volunteers, Media & Traders	£61,087
Event Organisers	£62,512
Total	£2,756,978

3.10 Output, GVA and Employment

The following factors were used to translate this expenditure into output, GVA and employment.

Conversion Factors	
	Factors
Output	1.42
GVA:Output	0.53
Employment	£57,000

This gives net additional impacts as set out in the table below.

Net Additional Impacts	
	Impacts
Output	£3,914,909
Gross Value Added	£2,067,579
FTEs	69

3.11 Return on Investment

The return on investment for the funders is given in the table below.

Return on Investment	
Bòrd na Gàidhlig	£1:£18
Scottish Government	£1:£24
Highland Council	£1:£26
EventScotland	£1:£196
Creative Scotland	£1:£1,305

4 CONCLUSIONS

4.1 Introduction

This Chapter provides the conclusions for the study.

4.2 Visitor Profile

A total of 73% of visitors were female, 27% male and 1% identify in another way. The most common age groups for adult visitors were 55-64 (26%) and 65-74 (22%). The most common local authority areas were Highland (35%), Argyll & Bute (9%), Comhairle nan Eilean Siar (9%), Glasgow (7%) and Edinburgh (5%).

The most common ways in which visitors found out about the event were always having known about the Mòd (63%), attended previously (61%), word of mouth (32%), An Comunn website (25%) and social media (21%). The most common ways to buy tickets were online (52%) and at venues during the event (42%).

The most common forms of accommodation were hotel (45%), self-catering (28%) and guest house/B&B (11%).

4.3 Views on the Event

The event is highly thought of with ratings of very good/good for fringe events (94%), atmosphere (93%), competition (90%), organisation (89%), and information (83%).

The most commonly suggested improvements were to do something about the overrun in some events (8%), the comment was most often around children's events, more aspects in English (2%), and late night opening of pubs (2%).

A total of 86% had attended at least one Mòd in the last 10 years. Of returning visitors, just over half (51%) considered this year's event as much better/better, with 44% reporting it was of the same quality as in previous years. A total of 91% stated that they are very likely/likely to attend The Mòd 2026 in Glasgow.

4.4 Views on Fort William

A total of 95% visited local restaurants/cafes/pubs, 89% local shops and 72% local visitor attractions/places of interest. Fort William is highly thought of with 91% rating it very good/good as a host destination.

Different aspects are also highly rated as very good/good including local visitor attractions/places of interest (85%), local restaurants/cafes/pubs (82%), and accommodation (78%). The rating of local shopping is a little more mixed (67%). A total of 73% said they are very likely/likely to return to Fort William for a future leisure visit.

4.5 Online Participation

A total of 74% watched live streaming and 15% competed online, with the remaining 12% doing both. A total of 61% would have taken part in the Mòd anyway, even if it hadn't been available online.

Engaging online made 83% want to go to the Mòd in 2026. For a quarter it allowed them to participate and for 4% their local choir to participate.

4.6 Gaelic Skills and Social Impacts

A total of 34% of respondents considered themselves to be a fluent Gaelic speaker, with 23% stating that they had some/limited knowledge. A further 26% described themselves as a learner and 7% as an enthusiast/novice. Only 10% said that they did not speak any Gaelic.

The Mòd has led 83% to believe more strongly in the importance of Gaelic. It has encouraged 71% to improve their Gaelic language skills and 70% to use Gaelic more often. For 64% it has increased their awareness and 60% their understanding of Gaelic arts. For 60% it has enhanced their Gaelic skills.

Just under four-fifths (79%) participate at least once every three months in Gaelic cultural events/activities. The Mòd has inspired 74% to attend Gaelic events/activities more frequently.

The Mòd is beneficial to the mental health of 73%, encourages 80% to engage socially and for 83% is a great way to meet friends.

4.7 Other Comments

Respondents were asked if there were any other comments they would like to make about the event. The most common were fantastic/excellent/great event (17%), well organised (12%), marquee/tent was great (8%), a number of events ran over/were late (8%), and great buzz/atmosphere (6%).

4.8 Economic Impacts

Total visitor attendees was 9,404. A total of 65% of visitors were from outside Highland and 81% stayed overnight. The economic impacts are summarised in the table below.

Net Additional Impacts	
	Highland
Net Direct Expenditure	£2,756,978
Output	£3,914,909
GVA	£2,067,579
Employment (FTEs)	69

The ROIs are given in the table below.

Return on Investment	
Bòrd na Gàidhlig	£1:£18
Scottish Government	£1:£24
Highland Council	£1:£26
EventScotland	£1:£196
Creative Scotland	£1:£1,305