

# Let's *Celebrate*<sup>2017</sup>

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The Cultural and Economic  
Contribution of Live Entertainment  
Events in Ireland





“ Irish people's collective adeptness at weaving our rich artistic heritage into the events that we stage is one of the major reasons why our cultural footprint is so well travelled. Time and again we witness iconic live events that capture all that is great about Irish culture and identity and see it shared around the world.”

**Mary Davis, Global CEO, Special Olympics International**

“ The cultural impact of live entertainment is unique in that it not only allows for audiences to witness the craft of all those bringing art and culture to life but, more importantly, brings audiences together to discuss and mediate what has unfolded before them.”

**Moya Doherty, Riverdance Producer & Chairperson of the RTE Board**

◀ Croke Park  
Photo credit: Paulo Goncalves

⬆ Riverdance, Croke Park  
Photo credit: Tyrone Productions





*Playing in Ireland is always one of the highlights of my tours. I always look forward to coming to Ireland, the crowd is always amazing and there seems to be an incredible connection between audience and performer. Ireland has a special place in it's heart for live music."*

**Robbie Williams**



**Robbie Williams, Aviva Stadium**  
Photo credit: Paulo Goncalves



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Let's *Celebrate* 2017  
**The Cultural and Economic Contribution of Live Entertainment Events in Ireland**

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## Executive Summary

Quantifying the economic and cultural impact of live entertainment in Ireland for the first time, this work is a ground-breaking independent piece of research. It has taken eighteen months to come to fruition and has involved high level contributions from across the live events industry in Ireland.

The purpose of the project is designed to gain the public's recognition and support for Ireland's live entertainment industry and in particular its artists, musicians, performers and the supporting industry as a whole: to provide the industry with a snap-shot-in-time benchmark document against which the sector can be measured, and which is designed to benefit the overall industry and also to provide an important credible educational tool for Colleges, Universities, Research Bodies etc. to use.

Let's Celebrate was conceived, written and co-ordinated by Justin Green/Wide Awake Communications, Dublin-based consultants. The research applies the economic and cultural assessment methodologies (pages 46 & 47) of London based International Economists BOP Consulting, to extensive Ticketmaster data, and a large-scale and in-depth research survey of attendee responses at Ticketmaster events (5,764 respondents). It assesses the impact of a range of different live entertainment genres, music; arts, theatre and comedy and family, attractions and exhibitions. It also breaks down the impact of these genres geographically, considering their impacts upon Dublin, the rest of the Republic of Ireland and Northern Ireland, while providing a number of case studies on live entertainment across the Island of Ireland.

The study analyses the twelve months of events taking place between 1st March 2015 and 29th February 2016. During this period, over 4 million people attended Ticketmaster events in the Island of Ireland. This attendance generated €1.7bn of net additional revenue and €669m of net additional Gross Value Added (GVA). This is only the money that would not otherwise have been generated had the events not gone ahead. These figures take into account the spending by attendees as part of their trips (food, drink, merchandise, accommodation, transport) and the impact upon relevant supply chains of this spending by attendees. An estimated 3.7m+ bed-nights were generated by these trips with 433,666 attendees coming from outside the Republic of Ireland. For every single €1 spent on a ticket, an additional €6.06 of revenue is generated within the rest of the economy.

Live entertainment therefore, is an essential part of Ireland's economy and tourist sector, which is powered by the international appeal of Ireland's cultural richness and the unique warmth and enthusiasm of Irish audiences. Our research found that almost all attendees at live entertainment events in Ireland would recommend attendance to their

*A special message from*

# Michael Bublé...

to Let's **Celebrate**

*Congratulations on your hard work. In British Columbia where I come from I've actually tried to do the same thing. I tried to express how important it is to our economy, for even local musicians and local promoters, giving people jobs, whether that's helping to set up an arena or a theatre, everything from making records to packaging them. It's not just good for people's bottom line, it's good for culture and it's good for your city, so congratulations and good luck with it Justin.*



Michael Bublé

Photo credit: Patrick O'Leary

friends and family. Live music goers gave an average mark of 8.8 out of 10 for the quality of the event(s) they attended and 78% of tourists confirmed the live entertainment scene in Ireland makes them more likely to re-visit. The cultural strength of Ireland drives the willingness to purchase tickets, which in turn makes live entertainment such a vital facilitator of tourism and economic growth in Ireland.



# Introduction

“Justin!... JustIN!...JUSTIN!”

My father called up the stairs, as I sat in my bedroom day-dreaming up new ways of how best to promote my upcoming ‘Battle of The Bands’ competition that was to feature 10 acts in the local school hall.

Without any response, the calls became louder and louder, “JUSTIN, JUSTIN, JUSTIN”, until I answered. “Yes, coming ...”

My father again called out, “Will you ever come down the stairs NOW, there’s some bloody guy called Elvis on the phone for you”!

To my delight, yes indeed there was, none other than Elvis Costello who telephoned my family home phone to agree to sponsor my upcoming music competition... I was just 15 years old and there it all began!

30 years later, I am still earning a living from this entertainment industry, as are thousands upon thousands of others, all contributing substantially to the Irish economy, in the exact same way many other different sectors of industry are doing here in Ireland.

In fact, an astonishing €1.7 billion additional revenue was generated, creating over 11,000 additional jobs, adding a massive €669 million additional gross value by the 4 million plus people who attended events annually. This created over 3 million ‘Bed Nights’ the equivalent of over 54 Sold Out All Ireland Finals at GAA Headquarters Croke Park, by relevant Ticketmaster events across the entire island of Ireland as this document highlights. For every single €1 spent on a ticket an additional €6.06 of revenue is generated within the economy.

However, for whatever reason, the entertainment industry is frequently overlooked and not always respected as the viable and tangible professional industry that it is, unlike many other similar fields.

Unlike the position in many other countries, the overall live entertainment industry in Ireland does not have any representative body to represent its interests in a proper and unified manner. This is particularly disappointing in light of the level of recognition and respect our musicians, actors, dancers and various other performers gain internationally time and time again.

It was during one of many conversations over the years regarding the industry’s absence of a single representative body, that the idea of producing a benchmarking document to examine the current status of the live entertainment industry in Ireland and in particular, its economic and cultural contribution to the country came about.

That idea has now resulted in this ‘Farm to Fork’ independent report of relevant live entertainment events held in Ireland, in that all research and information is traceable, verifiable and quantifiable. This not-for-profit, non commercial, independent document highlights, demonstrates and more importantly celebrates the extensive contributions made by live entertainment and event tourism in showcasing Ireland’s rich culture, its artistic heritage and its ‘Ceád Mile Fáilte’, all of which are globally synonymous with Ireland.

Incredibly, no similar document has ever been previously published and as I believed the overall industry would benefit enormously from such a work (a sentiment echoed by

many others, not least the various contributors to this document), I felt ideally positioned to undertake the task in view of my extensive experience working within the industry over the past 25 years. Indeed, the overall level of goodwill shown when I approached various people for guidance and support was particularly meaningful to me, in light of the high calibre, respectability and credibility of such individuals within their particular fields.

This free to use document is a stand-alone report, the purpose of which is designed to gain the public’s recognition and support for Ireland’s live entertainment industry and in particular its artists, musicians, performers

and the supporting industry as a whole: to provide the industry with a snap-shot-in-time benchmark document against which the sector can be measured, and which is designed to benefit the overall industry and also to provide an important credible educational tool for Colleges, Universities, Research Bodies etc. to use.

I felt it to be extremely important that every element of the report, including both figures and research be quantifiable, tangible and verifiable. Therefore the Audit is based on factual information and presented in a format which provides a template for the industry to build upon and further enhance and develop down the road, in an attempt to bring recognition of the overall industry forward and to where I believe it should already be today.

For this reason, the document fully analyses Ticketmaster ticketing data for relevant events sold by the company and which took place between the relevant period, namely the 1st March 2015 and 29th February 2016. The relevant events are categorised under three headings, that of Music: Arts, Theatre and Comedy: Family, Attractions and Exhibitions.. Such events feature both local and international artists and have taken place in intimate venues with a few hundred capacity, up to stadium shows, festivals etc. throughout the Republic of Ireland.



Taylor Swift, 3Arena  
Photo credit: Kathrin Baumbach

(cont. overleaf)



The number of tickets sold by Ticketmaster and audited in the report represent only a small fraction of the overall value and importance of live entertainment events that took place during the relevant period as Ticketmaster only supply less than 50% of tickets that are captured within this report. Neither does the report take into consideration the economic impact of the 100,000 plus people who annually attend free music sessions up and down the county (according to IMRO figures).

However despite this, our research shows that within the relevant 12 month period, almost 3.5 million patrons attended relevant Ticketmaster ticketed events held in the Republic of Ireland (including over 433,000 tourists): with such patron's generating additional revenue spending of over €1.3 billion.

The primary research undertaken for this report was an online survey sent out to Ticketmaster ticket holders who attended the live events during the relevant period, to which there were 5,764 response. This has resulted in this document being the most extensive industry audit ever undertaken in Ireland.

To this end I would like to thank all the following people (in alphabetical order) for their inspiration, support and contributions:

Mike Adamson	Paul Latham
Peter Aiken	Ollie McGhie
Melvin Benn	Eddie McGuinness
Bren Berry	Paul McGuinness
Panti Bliss	Peter McKenna
Michael Bublé	Lord Henry Mountcharles
Andrew Burke	Pat Moylan
Michael Burke	Martin Murphy
Des Cahill	Richard Naylor
Anne Clarke	Brendan O'Carroll
Simon Cowell	Daniel O'Donnell
Padraig Cribben	Danny O'Donoghue
Mark Crossingham	Fergus O'Donoghue
John Crumlish	Patrick O'Donoghue
Mary Davis	Ray O'Donoghue
Ian Dempsey	John O' Farrell
Zach Desmond	Donall O'Keeffe
Moya Doherty	Michael O'Leary
Joe Dolan	Jennifer Quinlan
Caroline Downey	Stephen Rae
Tom Dunne	Mark Rowlette
Keith English	Eddie Rowley
Kenneth Feld	Richard Shakespeare
Victor Finn	Niall Stokes
Michael Flatley	Ian Talbot
John Flynn	Jonathan Todd
Larry Gogan	Ryan Tubridy
Hozier	Neil Walker
Garry Hynes	Louis Walsh
Keith Johnson	Marty Whelan
Jeanette Keane	Laura Whitmore
Joanna Keane	Robbie Williams
Barry Kenny	Ray Yeates

In particular, I would like to give a special acknowledgement and thanks to Denis Desmond for his long term mentoring and support over the past 25 years which without doubt, has helped shape my career path and success to date.



*The Farm to Fork  
independent report of live  
entertainment events"*



Slash  
Photo credit: Paulo Goncalves

Finally, I would like to remember all the key inspirational figures who sadly are no longer with us but who influenced my career down the years particularly Richie Taylor (RT), Eamonn O'Connor, Jim Aiken, Bill O' Donovan, Chris Roche, Tony Fenton, Eugene Moloney, George Byrne and Gerry Ryan.

If you the reader glean just one simple fact or learn just one single lesson from our work, or if it opens your eyes to something not previously acknowledged, it will have achieved its purpose.

I hope you enjoy the read and ..... 'Let's Celebrate....'

Author & Creator,

Justin Green  
Wide Awake Communications

In Partnership with





# Welcome...

## the 'Let's *Celebrate*' Project

There is a saying in economics that, "if it is not measurable then it does not exist". Economists need numbers and as a result, industries without data just get ignored. It is like they don't exist or are not important. This has been the main reason why live performances in music and the arts have been so overlooked when it comes to industries that count – or can be counted! Well, that is all about to change thanks to the vision and hard work of Justin Green in leading this project on the value that live performances bring to the Irish economy. Using a very comprehensive and robust dataset, this study highlights the turnover of these industries, the number of jobs created as well as spill-over effects on the rest of the economy. Live performance is clearly shown to be a valuable business sector. Whether it is seeing a play at the theatre or a gig at Vicar Street I will now be acutely aware that my social expenditure has big economic benefits. Let's hope there is much more follow-on research on this important area of the economy.

**Professor Andrew Burke, Dean & Chair of Business Studies, Trinity College Dublin**

“The Entertainment industry employs as many people in Ireland as Google, Apple, Yahoo and Twitter combined. While events are sometimes an inconvenience for a short period we cannot underestimate the benefits of same to our economy.”

**Denis Desmond, MCD Productions**

“Irish theatre consistently punches above its weight on the world stage. Here at home, audiences have the opportunity to see world-class theatre at a fraction of the cost they would pay in the West End or on Broadway.”

**Anne Clarke, Producer Landmark Productions**

“Live entertainment events make a substantial economic contribution to Ireland, not least the many thousands of visitors who fly to and stay here in Ireland to attend live events. Ryanair is very proud to be a supporter of the live entertainment industry here in Ireland.”

**Michael O'Leary, Ryanair CEO**



▲ Brendan Gleeson, Domhnall Gleeson and Brian Gleeson in Enda Walsh's *The Walworth Farce*. Produced by Landmark Productions at the Olympia Theatre, 2016  
Photo credit: Patrick Redmond



▲ *Once* at the Olympia Theatre, Dublin  
Photo credit: Patrick Redmond



# Foreword



"Is Ireland a great place to do music nowadays?"

When U2 were starting out there was very little knowledge of how the international business worked and we decided not to go to London and to try the DIY approach,

"Making our own clothes..." Bono used to call it. Around about the same time recording studios and rehearsal facilities and technicians started to pop up in Ireland. There were professional concert promoters. When U2 became world champions in the late 80s the country was really proud of us and everyone was suddenly interested in bands. It was like when Barry McGuigan was winning, everyone became a boxing expert. I think Ireland's relationship with U2 is one of mutual pride and respect.

The successful Music Generation project putting vocal and instrumental teachers in schools and communities nationwide that the band have funded is a credit to them and the other partners - The Ireland Funds, the Department of Education and Skills, Local Music Education Partnerships, Music Network and the Arts Council. The project had been tested in a couple of counties, but the nationwide rollout had stalled due to cutbacks. U2 stepped in with €5m in 2009, the proceeds of their three Croke Park concerts. They have put more money in since.

It's a regular disappointment when politicians, as they do routinely, pay lip service to the importance of the arts in our culture and then continue the steady reduction of funding to music, film, theatre and the visual arts. Everyone in the arts dreads those encounters with politicians. The casual downgrading of the Arts portfolio and the subsequent attempts to say it hadn't really been downgraded were sadly typical".

**Paul McGuinness**



Walking through the theatre foyer, hearing such an array of Irish, English and American accents along with multiple foreign languages, reiterates the impact that productions like 'Riverdance' and 'Once The Musical' have in drawing international

tourists from around the world. These guests, along with our Irish patrons, experience Ireland's rich culture and history brought to life through word, dance, song and artistic performance crossing all language barriers in giving audiences an experience like no other. We have had the great pleasure of welcoming many Irish and international performers, audiences and guests through our doors but a very special moment for the Gaiety Theatre was welcoming US First Lady Michelle Obama and her family to the adopted home of Riverdance.

The Gaiety Theatre, together with the Keane family, began hosting the annual John B. Keane season to celebrate this critically acclaimed Irish writer whose stories have stood the test of time with both Irish and International audiences. Over the last few years, we have had the honour of hosting such a high calibre of productions with great directors and producers in staging *The Field*, *Moll*, *Big Maggie* and *The Matchmaker* and we look forward to the world premiere of *The Successful TD* and *The Year Of The Hiker*.

It is a testament to the theatres that over the years such great artists and playwrights like Billy Connolly, Vanessa Redgrave, Brendan Gleeson, Joan Rivers, John Hurt, Cillian Murphy, Niall Toibin, Brendan Behan, Samuel Beckett and Martin McDonagh have presented work on The Gaiety and Olympia Theatre stages and entertained versatile audiences throughout the year with spoken word, ballet, opera, comedy and of course the annual Dublin Theatre Festival.

It is our culture and it comes to life on stages in cities, towns and villages across Ireland. Not only is it our culture, but our history and who we are...and it is because of this we should all Celebrate!

**Caroline Downey, Director Gaiety Theatre, Olympia Theatre and MCD Productions**





What is the first thing you associate with Ireland?

Ask people from anywhere in the world that question nowadays, and, likely as not, they will talk immediately about Irish culture.

They'll wax lyrical about our great actors, our writers, our theatres, our movies – but most of all about our musicians and bands.

In an interview with Hot Press, Bruce Springsteen's guitar maestro Miami Steve Van Zandt put it simply. "Ireland is the best place in the world for music," he said. And who are we to argue?

Tourists know that there are great gigs, festivals and live events, all year round here, where they can immerse themselves in the Irish way of doing things. And it is not for nothing that the biggest artists and performers from across the globe so often praise Irish audiences as the best in the world. There is something special about the way people love live music in this part of the world and give themselves to it, individually and collectively – whether at the many smaller venues around the country; in a purpose-built theatre like 3 Arena; or at the big outdoor shows and festivals that give the Irish summer its unique rhythm and magic.

Music is in the blood. It is part of our cultural DNA. But it is also of huge economic importance, in a way that has too seldom been recognised at official level. After all, music, theatre, comedy and festivals are among the key attractions for visitors to this country.

I trust therefore that this important study will clarify, in a way that brooks no further argument, that the music and entertainment industry truly is a vital part of what makes this country unique and attractive as a place to live and to visit – and that it, and the Irish artists who are so important to its health and well-being, should be encouraged and supported and celebrated at every opportunity, for the joy and the inspiration that they deliver so widely and so well, to so many.

**Niall Stokes, Founder and Editor, Hot Press**



Longitude, Marlay Park  
Photo credit: Paulo Goncalves



## LET'S CELEBRATE

**“** Live events make a strong contribution to the economy with a significant boost to local business through ticket sales, increased visitor numbers and increased local spend on food, drink and transport.”

**Ian Talbot, CEO, Chambers Ireland**

**“** A vibrant and diverse Festivals and events offering is vital to sustainable growth of tourism to Ireland. Quality events help enhance the experience of visitors to Ireland. Visitors are especially keen to experience quality music events.”

**Mark Rowlette, Fáilte Ireland**



One Direction  
Photo credit: Arthur Carron

**“** For such a small island Ireland has produced incredible talent. I was delighted to put groups like Westlife on the world stage, and I know they brought thousands of visitors to Ireland from as far away as Asia!”

**Louis Walsh, The X Factor**

**“** Amazing artists have come out of Ireland through the decades and I know there is young talent to be discovered there. It's the reason we brought The X Factor back to Dublin this year.”

**Simon Cowell, The X Factor**

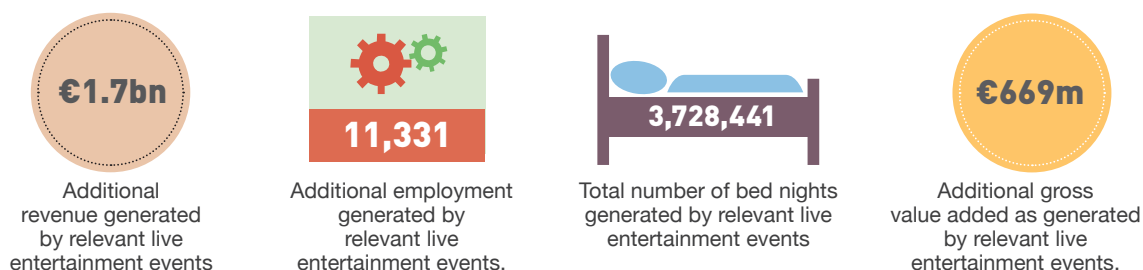
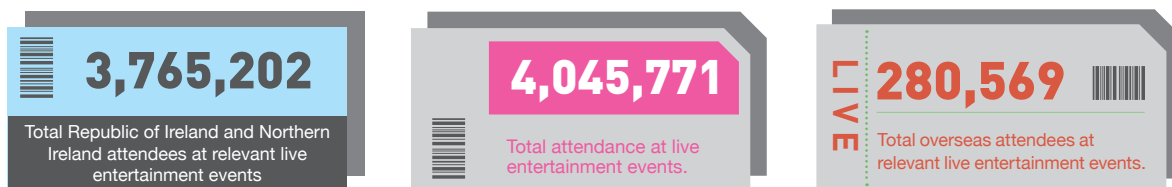


# THE FACTS

## Live Entertainment in Numbers

For an explanation of the methodology used to generate the estimates for additional revenue, Gross Value Added (GVA) and Full-time Equivalent jobs, please see the Methodology Annex at the back of the report, starting on p.46.

### For events held on the entire Island of Ireland



### For events held in the Republic of Ireland only



### Top 30 Grossing Events

768,453 tickets Box office = €66m.

### Propensity to attend Live Music by Geography

Territory	Population	Number of Live Music Attendees	Ratio (Music Tickets per Resident)
UK	64.1 million	27.7 million	0.43
Republic of Ireland	4.6 million	2.3 million	0.49
London	8.7 million	8.4 million	0.97
Dublin / County	1.3 million	1.9 million	1.38





# SPOTLIGHT:

## DUBLIN CITY



U2, 3Arena

Photo credit: Kathrin Baumbach/ Hot Press

Many internationally renowned artists, events, festivals and productions feature Ireland in their touring plans, and time and time again the reason given is simply because of the world-renowned 'Céad Mile Failte' they receive from the Irish audiences once they arrive and set foot on the stage.

Dublin attracts some of the biggest names and stages some of the largest productions on offer not least because of the enthusiastic audiences and geographical location, but also because of Dublin's many live entertainment venues, its wide range of facilities and great infrastructure on offer to both domestic audiences and overseas tourists alike.

Throughout Dublin City, there are many examples of state-of-the-art venues ranging from theatres to stadiums, multi-configurational spaces to outdoor locations which stage a variety of live events ranging from opera to rock, theatre to comedy, family attractions to the performing arts, flower shows to food exhibitions.

Some good examples of the most significant of these include the historic and recently refurbished Gaiety and Olympia Theatres, Vicar Street, the Bord Gáis Energy Theatre and the D.C.U. Helix Theatre: stadium locations at the RDS, Aviva and Croke Park which can accommodate capacities ranging from 20,000 up to 82,300 patrons: multi- configurational offerings supplied by the 3Arena as well as outdoor locations such as the Royal Hospital Kilmainham, Iveagh Gardens and the Phoenix Park which venues and locations have delivered events as diverse as rock, pop, country, ballet, opera, drama, orchestral or musical shows, theatrical, comedy performances as well as a variety of festivals and family shows offering something to suit all demographics and interests.

*At 3Arena and the Bord Gais Energy Theatre in Dublin we entertain over 1.4 million live entertainment fans every year. There is magic in an Irish auditorium that exists nowhere else in the world. An artist's most common request is, can we commence our Global/European tour in Ireland where the most enthusiastic and uninhibited audience in the world hang out?*

*Be it rock, pop, country, ballet, opera, drama, orchestra or a musical show - this attracts a huge number of overseas audiences to share and experience this one of a kind indigenous magic.*

*Artistes arrive from all corners of the globe, but to them, it's always like coming home as they step onto the stage with a wow in their hearts as they feel the welcome, warmth and unique power of an Irish audience.*

**Mike Adamson, CEO Live Nation Ireland**

*Open air festivals and live music events contribute very significantly to the Irish economy. This research demonstrates that festivals reach into local communities also, providing employment and economic activity that bring benefits to areas other than just the large urban centres.*

**Victor Finn, Chief Executive, I.M.R.O.**



# Total Attendees at Live Entertainment Events

held in the Republic of Ireland and Northern Ireland

(Republic of Ireland, Northern Ireland & Overseas Attendees)

BREAKDOWN					
		=		+	
Events					
					Events
<hr/>					
MUSIC					
					
2,262,090		1,861,856		400,234	
Attendees		Attendees		Attendees	
<hr/>					
ARTS, THEATRE & COMEDY					
					
860,946		821,559		39,387	
Attendees		Attendees		Attendees	
<hr/>					
FAMILY, ATTRACTIONS & EXHIBITIONS					
					
293,375		289,239		4,136	
Attendees		Attendees		Attendees	
<hr/>					
<b>TOTAL</b>		<b>3,416,411</b>		<b>629,360</b>	
		Attendees		Attendees	





## SPOTLIGHT:

### DUBLIN COUNTY

▲ Disney On Ice Frozen, Citywest  
Photo credit: Copyright Disney

Dublin County has many live entertainment venues and events within easy reach of the City Centre and the main routes linking the County with the rest of Ireland.

Some of the best examples of such venues and events include the Citywest Hotel & Exhibition Centre which has become home for the Irish visits of the world-renowned 'Disney on Ice' shows for the past number of years where the spectacle continues to thrill families in their thousands. Marlay Park, Rathfarnham has played host to numerous large scale music events since 2001 featuring the likes of Coldplay, Arcade Fire, Muse, Oasis, Foo Fighters, Van Morrison as well as the award-winning Longitude 3-day music festival which has seen major international artists and home-produced talent such as Hozier, The Coronas and Kodaline take to the stage, set against the magnificent backdrop of the Dublin mountains and the park's own spectacular scenic beauty.

Over recent years, Malahide Castle and Balbriggan's Ardgillan Castle hosted various events which have featured international artists such as REM, Radiohead and Prince, and in 2015, Dun Laoghaire's inaugural 'Proms on the Pier' transformed the location into a music festival of 70s and 80s nostalgia featuring the likes of Air Supply, Phil Coulter, 10cc along with many more acts of the same genre of music.

“ Every year we are always excited to bring Disney On Ice to our fans in Ireland. Since 1988 we've been showcasing the magic of Disney characters and stories to Irish families and we are proud to continue that tradition later this year. The warmth and affection all of our cast and crew are shown is a testament to the hospitality and caring that can only be found in Ireland.”

**Kenneth Feld, Chairman & CEO,  
Feld Entertainment**

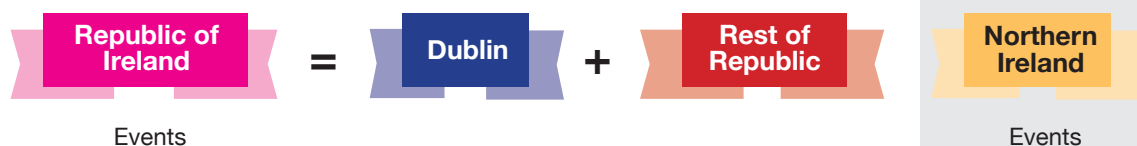
“ Since 2001, the €6.5m revenue generated directly from the Marlay concerts has enabled our Council develop its network of 30 children's playgrounds and various other park works as well as creating a sustainable funding model for our freely accessible park events programme enjoyed by local communities and international tourists alike. This would not have been possible without such a valuable and much needed revenue source.”

**Richard Shakespeare, Director of  
Municipal Services, Dún Laoghaire-  
Rathdown County Council**

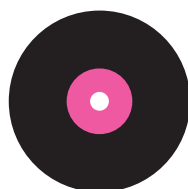
**FACT** Over 3.7 million  
Irish customers

## Attendance by Republic of Ireland & Northern Ireland Attendees at Live Entertainment Events

### BREAKDOWN



### MUSIC



2,141,172  
Attendees



1,767,717  
Attendees



373,455  
Attendees



419,744  
Attendees

### ARTS, THEATRE & COMEDY



766,763  
Attendees



732,886  
Attendees



33,877  
Attendees



58,613  
Attendees

### FAMILY, ATTRACTIONS & EXHIBITIONS



285,090  
Attendees



282,689  
Attendees



2,401  
Attendees



93,819  
Attendees

### TOTAL

**3,193,025**  
Attendees

**572,176**  
Attendees





# SPOTLIGHT:

## NORTH EAST REGION

▲ Foo Fighters, Slane Castle  
Photo credit: Paulo Goncalves

Ireland's premier natural outdoor amphitheatre is located in the grounds of Slane Castle, which has hosted concerts for up to 80,000 fans since 1981 - the inaugural concert was headlined by Thin Lizzy and also saw U2's first appearance at the venue. The band later recorded their studio album 'Unforgettable Fire' in the Castle a few years later, with the band headlining two sell-out shows at the venue in 2001 when they played to an astonishing 160,000 fans.

Indeed, a truly amazing array of international and domestic artists have appeared at the iconic venue over the years with its shows continually attracting audiences from all around the world, such is the Castle's legendary status in welcoming music greats.

1981 THIN LIZZY	2002 STEREOPHONICS
1982 ROLLING STONES	2003 RED HOT CHILI PEPPERS
1984 BOB DYLAN	2005 MADONNA
1985 BRUCE SPRINGSTEEN	2007 ROLLING STONES
1986 QUEEN	2009 OASIS
1987 DAVID BOWIE	2011 KINGS OF LEON
1992 GUNS N' ROSES	2013 BON JOVI
1993 NEIL YOUNG	2013 EMINEM
1995 REM	2015 FOO FIGHTERS
1998 THE VERVE	
1999 ROBBIE WILLIAMS	
2000 BRYAN ADAMS	
2001 U2 (played two shows that year)	

“Since ancient times, Slane has been steeped in history and myth. The live shows at the Castle since 1981 are now part of modern mythology.”

**Lord Henry Mountcharles, Slane Castle**

“Ireland has always had a strong sense of itself especially its creative and musical ability. Some of the best performers and talents in the world have hailed from this tiny island and I feel so proud to see the reach it has all over the world. No one does a live performance like the Irish!”

**Laura Whitmore,  
International Television Broadcaster**





“When the recession hit Ireland I changed all the big screens in Lord of the Dance to show off the Irish landscape and promote the country. As an artist I felt it was important to do that.”

**Michael Flatley**



# Additional Revenue from Live Entertainment Events (€m)

(See page 29 for Sources of Additional Direct Revenue)

BREAKDOWN			
	=	 + 	
Events			Events
MUSIC			
			
€900m	€699m	€200m	€326m
ARTS, THEATRE & COMEDY			
			
€300m	€281m	€19m	€38m
FAMILY, ATTRACTIONS & EXHIBITIONS			
			
€61m	€60m	€1m	€34m
TOTAL			€398m





## SPOTLIGHT:

### SOUTH EAST REGION

Ballet Ireland's *Coppelia*  
Photo credit: Ewa Figaszewska



Some of the main centres for live entertainment events within this region are located in Waterford, Wexford and Kilkenny which have many venues such as Garter Lane Arts Centre and the Theatre Royal in Waterford which stage events ranging from musical acts, comedy, dance and dramatic performances. The National Opera House in Wexford not only hosts the Wexford Opera Festival, but also events ranging from instrumental performers to music recitals, choral, pop and country concerts, ballet to comedy, family shows and attractions, some of which have featured the likes of Ballet Ireland, Mario Rosenstock, Nathan Carter, The High Kings, Keith Barry and Tom Crean Antarctic Explorer.

Kilkenny has hosted an abundance of performers in locations ranging from intimate venues to Nowlan Park outdoor stadium which has played host to many international superstars such as Rod Stewart, Andrea Bocelli, Bruce Springsteen, Bob Dylan and Paul Simon who have entertained both local fans and many who travelled from outside the region and overseas to attend the performances.

Since 2012, the Wexford Spiegeltent has grown to be one of the biggest and most successful multi-genre festivals in Ireland blending an old world feel with the best in popular entertainment. The programme of events include contemporary music, comedy, theatre and dance. Some of the acts that have performed at the event have included The Saw Doctors, Jack L, The Rocky Horror Picture Show, Rebecca Storm and David McSavage.



*On Lyric FM we can see (and hear) daily how popular Opera is and continues to grow.*

*Both culturally and economically, touring companies bring people to theatres all around Ireland while Wexford Festival Opera has been drawing fans since 1951. These days this world renowned festival brings visitors from all over the world to Ireland for two weeks."*













**Marty Whelan, National Broadcaster RTE Lyric FM**



*When live entertainment events are staged in Kilkenny, such as the Sky Cats Laugh Comedy Festival or an outdoor concert at Nowlan Park, there is an immediate and positive impact to businesses in the area, as well as a great feel-good factor around the town. Frequently, we find tourists who visit for such events return back to Kilkenny with their families, based on their enjoyment during the previous trip."*

**John Flynn, The Flynn Hotel Group**

# Additional Gross Value Added from Live Entertainment Events (€m)

BREAKDOWN			
<div> <div>Republic of Ireland</div> <div>=</div> <div>Dublin</div> <div>+</div> <div>Rest of Republic</div> </div> <div>Events</div>			<div>Northern Ireland</div> <div>Events</div>
MUSIC			
<div>  </div> <div>€376m</div>	<div>  </div> <div>€292m</div>	<div>  </div> <div>€84m</div>	<div>  </div> <div>€127m</div>
ARTS, THEATRE & COMEDY			
<div>  </div> <div>€114m</div>	<div>  </div> <div>€107m</div>	<div>  </div> <div>€7m</div>	<div>  </div> <div>€15m</div>
FAMILY, ATTRACTIONS & EXHIBITIONS			
<div>  </div> <div>€23m</div>	<div>  </div> <div>€22m</div>	<div>  </div> <div>€1m</div>	<div>  </div> <div>€14m</div>
TOTAL			€513m
			€156m



# SPOTLIGHT:

## SOUTHERN REGION



Van Morrison

Photo credit: Kathrin Baumbach/ Hot Press

The most significant live entertainment events which take place in the Southern Region are staged in Cork City and its surrounding area.

There are many venues, events and festivals in the region, including the Cork Opera House, which stages a wide array of events ranging from opera, music acts, musicals, comedy, dance and family attractions that have included the comedian Al Porter, the Legends of Cork Showbands era, Romeo & Juliette, Prague Chamber Orchestra to name but a few. The Independence Music & Arts Festival in Mitchelstown has become a firm favourite with festival-goers who travel from all regions to attend the annual event which has seen the likes of Jape, Ash, The Dandy Warhols, Wyvern Lingo, Walking on Cars and Bell X1 and perform over the 3-day weekend camping event.

Since its inception in 2005, 'Live At The Marquee' has attracted over 1 million people to over 200 shows in its tented venue by the River Lee. Many of the patrons travel from outside the area specifically to attend the events which have featured the very best of both Irish music, dance and comedy acts along with a vast array of world class international artists. In music this has included performances by the likes of Elton John, Roger Waters, Van Morrison, Bob Dylan, Neil Young, Pink, Rod Stewart, Lady Gaga, The Who, Eric Clapton, Kanye West, Dolly Parton, Lionel Richie, Jay-Z, Bryan Adams and Sting to name a few. Comedy performances have included top Irish comedians such as Tommy Tiernan, Dara O'Briain and Mario Rosenstock, and the Marquee has also hosted dance and musical performances by Riverdance, Michael Flatley's Lord of the Dance and MAMMA MIA!

The anticipation for each year's line up and the unique atmosphere that can only be found in that tent by the River Lee means that Live At The Marquee has become a firm favourite, not just for the fans who travel from all over to the South of Ireland, but also with the acts themselves, many of whom have come back to play the Marquee more than once.



*The Irish entertainment industry and the reception which artists receive when they perform here, is renowned throughout the world. So many artists speak of how special it is to play for audiences in Ireland. That is something to be very proud of and we must ensure that the support and encouragement is there at all levels to help the industry to continue to grow."*

**Peter Aiken, Aiken Promotions**



*Live entertainment events not only contribute a major welcomed boost to Cork's economy, but also provide the ideal platform to showcase our fantastic City's history and arts to the many thousands of Irish visitors and international tourists who otherwise may not visit our region."*

**Lord Mayor of Cork Cllr. Des Cahill**



*Can you imagine what life would be like without music and entertainment? Like a barren wasteland of miserable long days of never-ending dullness. Promoters deserve every plaudit for brightening up our lives - long may they reign."*

**Larry Gogan, National Broadcaster, RTE**



# Additional Employment from Live Entertainment Events


BREAKDOWN						
<div><div>Republic of Ireland</div></div>	=	<div><div>Dublin</div></div>	+	<div><div>Rest of Republic</div></div>		<div><div>Northern Ireland</div></div>
Events						Events
MUSIC						
6,448 Jobs		4,940 Jobs		1,509 Jobs		2,093 Jobs
ARTS, THEATRE & COMEDY						
1,869 Jobs		1,739 Jobs		130 Jobs		270 Jobs
FAMILY, ATTRACTIONS & EXHIBITIONS						
406 Jobs		395 Jobs		11 Jobs		245 Jobs
TOTAL		8,723 Jobs				2,608 Jobs





## SPOTLIGHT:

### MIDLANDS REGION

 **Grace Jones, Electric Picnic**  
Photo credit: Brian Mulligan

Ireland's Midland region has played host to many established and world-renowned music and arts festivals over the years.

The most popular and largest of such events is undoubtedly the Electric Picnic three-day music and arts festival held in Stradbally, County Laois which attracts up to 55,000 music, arts, culinary and artistic followers from both home and abroad each year, and which has great appeal to both the traditional festival-goers and families alike.

Some of the performers who have appeared at Electric Picnic over the past few years have included Simple Minds, Grace Jones, Blur, Sam Smith, Florence & the Machine, Beck, Pet Shop Boys, Manic Street Preachers, Paolo Nutini, Dublin Gospel Choir, RTE Orchestra. Some of the comedy acts featured have been Jason Byrne, Dylan Moran, Andrew Maxwell, Reginald D. Hunter, and culinary offerings have been catered for by top chefs such as Derry Clarke, Ross Lewis, and Kevin Thornton. The festival contains many cultural aspects such as A Cornucopia of Curious Performances and Inspiring Talks in the Science Gallery Tent.

Some of the other noteworthy Midlands festivals include the indie-rock Castlepalooza Music and Arts Festival in the stunning surrounds of Charleville Castle, and the Body & Soul Festival in the shadows of the equally beautiful Ballinlough Castle which caters for a wide range of music, arts and cultural tastes with something to suit all.

The Midlands has lots more intimate venues which not only offer music and dance events, comedy acts and theatrical productions, but are also used to stage one of Europe's largest amateur theatre festivals, the All Ireland Drama Festival in Athlone, and the Irish Country Music Awards in Mullingar. Both events attract many audiences to the area from both within Ireland and overseas.

**“** Words, and words with music in particular, are Ireland's greatest cultural offering. Electric Picnic has both in abundance, and we are proud we are such a big contributor to Ireland's live entertainment.”

**Melvin Benn,  
Managing Director Festival Republic**

**“** The Irish love to entertain and be entertained to such an extent that it is a huge part of our cultural identity at home and worldwide. We have developed a huge world-class entertainment industry here at home and across the globe which is an important source of livelihood for a very significant amount of our people. We are renowned performers (musicians, actors, comedians, dancers etc) and service providers (directors, producers, promoters, managers, sound & lighting technicians etc) and international acts love coming to the country and performing here as they consider Irish audiences amongst the best on the planet.”

**Bren Berry, Aiken Promotions**

**“** There is nothing like the buzz of seeing an Irish act like Walking On Cars playing to an international audience at Ireland's Music & Arts festival Electric Picnic, it's just simply incredible.”

**Mark Crossingham, Managing Director,  
Universal Music Ireland**

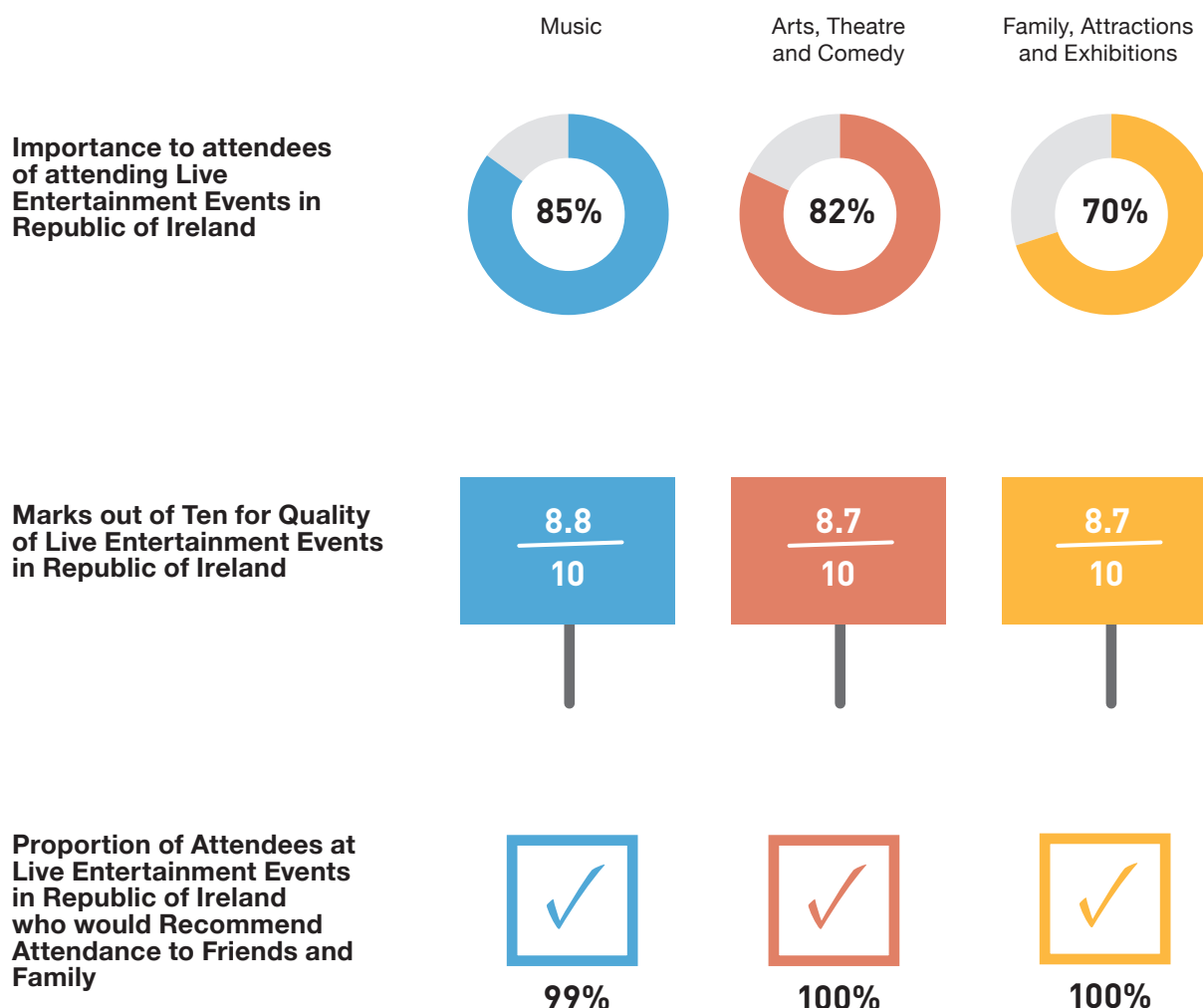


# Audience Insights & Profiles

## Results of 5,764 Customer Research Data

### Importance, Quality & Recommendations

We surveyed 5,764 attendees at events ticketed by Ticketmaster within the island of Ireland between 1 March 2015 and 29 February 2016. The Audience Insights on this and subsequent pages present the results of that survey, which provide insights into the economic behaviour and cultural preferences of attendees at live entertainment events in the island of Ireland.







## SPOTLIGHT:

### SOUTH WEST REGION

▲ Keith Duffy and Aisling O'Sullivan in Druid's production of *Big Maggie* by John B. Keane  
Photo credit: Robert Day

Visitors to the South-West have a wide range of events and venues to choose from when it comes to attending live entertainment events in the region.

John B. Keane, one of Ireland's foremost and most respected writers hailed from and is synonymous with Listowel, in County Kerry. Because of his literary genius, John B. is intrinsically linked with the very fabric of Ireland's rich literary culture. His stage adaptations have both educated and entertained Irish audiences and tourists time and time again in equal measure. His realistic and thought provoking portrayals of life in rural Ireland down the ages bring to life on stages all across the country the very best of Ireland's heritage and culture.

The premier venue in the South-West region is undoubtedly the INEC in Killarney. The purpose-built indoor venue can accommodate an audience of 2,400 fully seated/3,600 standing configuration and has hosted both national and international artists, events and festivals which have included Cliff Richard, Jimmy Carr, Billy Connolly, Stereophonics, Morrissey, Snow Patrol, and the Killarney Folkfest which has featured the likes of Moving Hearts, Sharon Shannon, The Tulla Céilí Band to name but a few. The INEC's flexibility and state-of-the-art technical capabilities also enable it to host large scale theatre and musical productions such as *Riverdance*, *Blood Brothers*, *Joseph and his Amazing Technicolor Dreamcoat*, John B. Keane's *'The Field'* and *Annie the Musical*.



*John B. Keane's work still packs a punch in contemporary Ireland and beyond.*

*Audiences still resonate with his stimulating ideas on love and marriage, greed, the lust for land, human frailties and the crippling effects of loneliness. As his daughter, I am proud to say that new generations identify with these timeless themes in theatres all over the world."*

**Joanna Keane, daughter of John B. Keane**



*Culture is not just an addition to our lives; it is our lives. It binds us together helping us make sense of who we are and what it is to be alive together in this time and place"*

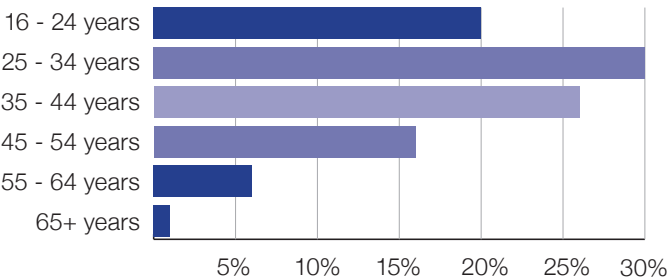
**Garry Hynes, Artistic Director Druid Theatre**



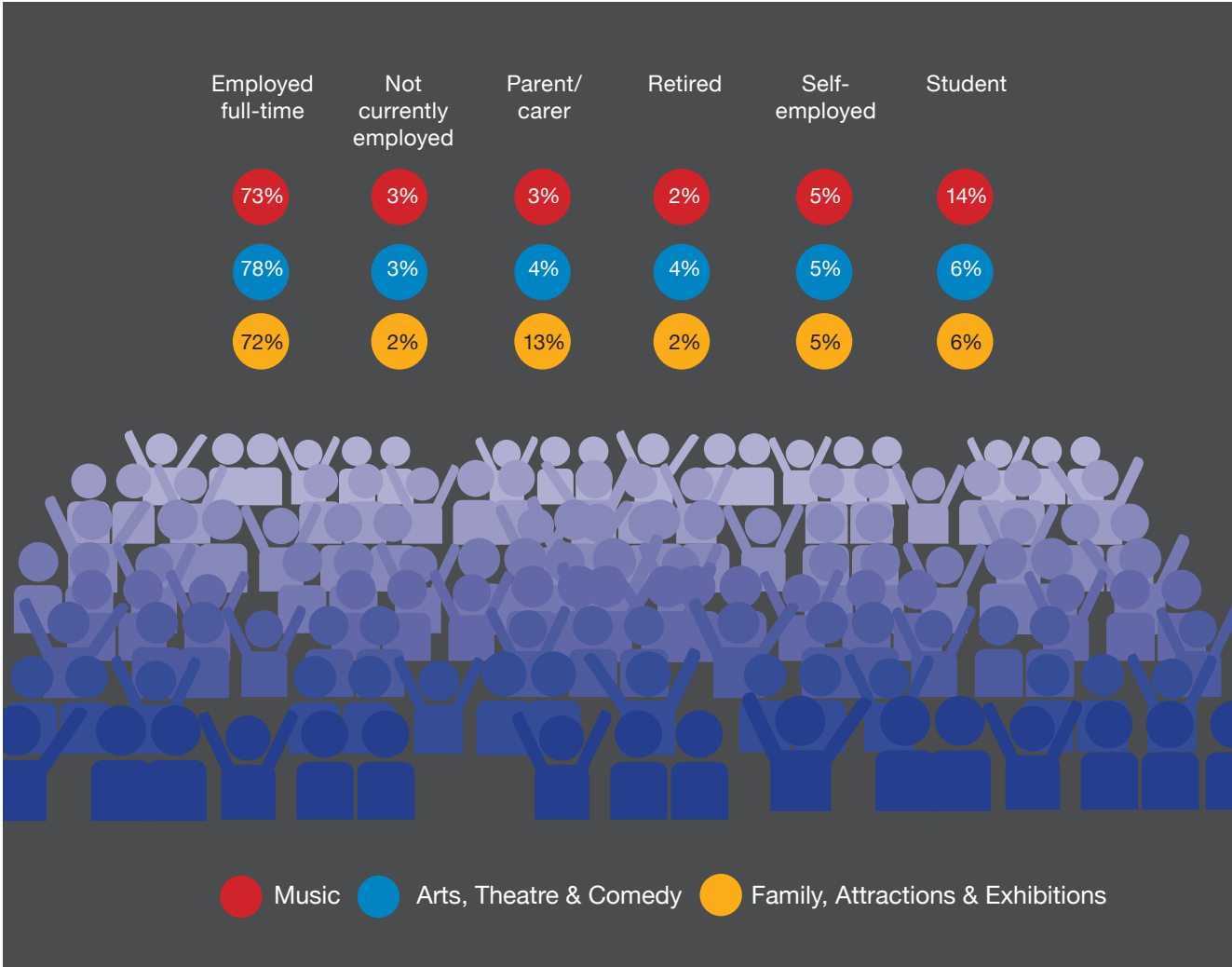
# Age and Status

## Profile of Attendees

Age of Attendees at Live Entertainment Events in the Republic of Ireland



Status of Attendees







## SPOTLIGHT:

### WEST REGION

▲ Stephen Rea and Cillian Murphy in *Ballyturk* by Enda Walsh, produced by Landmark Productions and Galway International Arts Festival.  
Photo credit: Patrick Redmond

Galway is undoubtedly the cultural capital of Ireland - indeed the City of Galway recently fought off strong competition to be officially appointed the European Capital of Culture in 2020, when the region will present an innovative year long cultural programme to highlight the richness and diversity of its culture.

Galway has a wide array of live entertainment venues ranging from small intimate venues, outdoor locations, festival tents and theatres such as the Town Hall Theatre, the Blackbox performance space, Leisureland Salthill, and the Comedy Carnival Spigeltent to name but a few.

Galway is also home to one of Europe's leading international arts festivals and a cultural flagship event for the West of Ireland region. The Galway International Arts Festival was founded in 1978 and takes place annually over 14 days in July when 200 events take place in 26 venues, attracting an annual attendance of approximately 200,000 people. The Festival works regularly with many of Ireland's leading artists and cultural organisations and has presented the work of seminal artists such as Philip Glass, Bill Viola, The National, Bon Iver, St. Vincent, John Grant, The Gloaming, Elvis Costello, John Gerrard, Hughie O'Donoghue and Sophie Calle. In recent years, working with its partners, festival productions have toured to London, New York, Edinburgh, Chicago, Adelaide, Sydney and Washington.

Druid Theatre is synonymous with Galway having been founded there in 1975 where they still have their own theatre on Druid Lane. Druid was the first professional theatre company in Ireland to be based outside Dublin and it tours its productions throughout Ireland and internationally. Some of Druid's most recent productions have included John B. Keane's 'Big Maggie', Beauty Queen of Linnane, Samuel Beckett's 'Waiting for Godot' to name but a few.

The Outing Lisdoonvarna LGBT Music & Matchmaking Festival is Ireland's only such event and has found its home on the West Coast along the Wild Atlantic Way. The event is now in its fourth year and is presented by Panti Bliss.

“ Culture is a key component in the makeup of the Irish identity; it helps us understand who we are and helps others understand us.”

**John Crumlish, Chief Executive of the Galway International Arts Festival**

“ Live entertainment is an essential part of Ireland's tourism and hospitality offering as a vibrant and attractive destination for visitors - both from at home and overseas.”

**Joe Dolan, President of the Irish Hotels Federation**

“ One of the key moments in any given week on *The Late Late Show* is the live music aspect. Three acts per week on live television, sometimes global superstars, often young acts appearing on tv for the first time, it illustrates how important music and live performance is to this country and to the international acts who perform here. Small island, big talent!”

**Ryan Tubridy, National Radio & Television Broadcaster**

**FACT** Over 3.7 million  
Bed Nights Generated

## Number of Bed Nights, Distance Travelled & Time Spent

Total number of bed  
nights generated across  
the Island of Ireland

**3,728,441**



Music  
2,915,797



Arts, Theatre and Comedy  
530,942



Family, Attractions and Exhibitions  
281,702

Proportion of attendees at Live Entertainment  
Events who travelled more than 20km to attend



Time spent at Live Entertainment Events as proportion  
of Attendees of these different kinds of events

	Less than 1 day	1 day	2 days	3 days	4 days	5 days
Arts, Theatre and Comedy	59%	24%	17%			
Family, Attractions and Exhibitions	60%	25%	9%	4%	1%	1%
Music	41%	26%	21%	10%	2%	0.1%





## SPOTLIGHT:

### NORTH WEST REGION



Daniel O'Donnell

Photo credit: Courtesy Of Big Mountain Productions (Opry An Luir)

Many live entertainment events comprising music, dance, comedy and theatre are staged in the North-West regional areas along the major tourist attraction of the Wild Atlantic Way, in locations such as Donegal, Sligo and Mayo.

Some of the many live events which take place in the area include Donegal's Sea Sessions Surf & Music Festival which has made its home in Bundoran since 2008. During this time it has played host to the likes of The Riptide Movement, Jape, Gavin James, Bad Manners and Tinie Tempah. Sligo Live Folk Roots & Indie Festival, which has been running since 2005, has brought the likes of Imelda May, Dervish, Jools Holland & his Rhythm and Blues Orchestra and The Waterboys to some fantastic venues located throughout Sligo town.

Over recent years, The Royal Theatre & Events Centre in Castlebar has been the premier state-of-the-art venue in the area. It has played host to a wide range of international and Irish artists and events from music to musicals, dramatic to comedy performances, family events and attractions including Tom Jones, Mario Rosenstock, Keith Barry, John B. Keane's *The Matchmaker*, Bryan Adams, The Castlebar Gospel Choir and Nathan Carter among many more.



*I feel honoured to have a great platform to fly the Irish flag and the Donegal colours wherever I perform around the world. I encourage people to come and experience what we love about Ireland. People have travelled to Ireland from America, Canada, Australia, New Zealand, and places like Holland and Norway in Europe, to see me in concert."*

**Daniel O'Donnell, Singer**



*The Arts in Ireland are a wonderful enrichment of our national life and a priceless component of the appeal of Ireland to people from overseas who come here to live, work or holiday."*

**Pat Moylan, Independent Theatre Producer & former Chair of The Arts Council**

**FACT**€749 million Spent  
in Additional Direct  
Revenue Alone

## Customer Insights & Economic Benefits

### Sources of Additional Direct Revenue from Ticketmaster Live Music Events (€m)

	Republic of Ireland	Dublin	Republic outside of Dublin	Northern Ireland
Box Office	125	99	26	25
Merchandise	38	31	8	10
Food & Drink	81	59	22	21
Accommodation	68	53	16	17
Shopping	55	44	11	14
Other Leisure Attractions	31	23	8	8
Travel within country	49	39	11	13
Total	447	347	100	107

### Sources of Additional Direct Revenue from Ticketmaster Live Arts, Theatre and Comedy Events (€m)

	Republic of Ireland	Dublin	Republic outside of Dublin	Northern Ireland
Box Office	36	34	2	3
Merchandise	36	35	2	3
Food & Drink	10	9	1	1
Accommodation	22	21	2	2
Shopping	17	16	1	1
Other Leisure Attractions	14	13	1	1
Travel within country	9	8	1	1
Total	146	136	9	10

### Sources of Additional Direct Revenue from Ticketmaster Live Family Events, Attractions and Exhibitions (€m)

	Republic of Ireland	Dublin	Republic outside of Dublin	Northern Ireland
Box Office	8	8	0.1	3
Merchandise	8	8	0.1	3
Food & Drink	4	3	0.2	1
Accommodation	5	4	0.1	1
Shopping	4	4	0.1	1
Other Leisure Attractions	0	0	0.1	0
Travel within country	1	1	0.1	0
Total	30	29	0.7	9

**TOTAL**

€623m

€126m

**FACT**

"Box office spend is a trigger for expenditure by other businesses and in other sectors. For every €1 spent on live entertainment tickets in the Republic of Ireland, an additional €6.06 of revenue is generated in the rest of the country's economy. This is composed of three elements: ancillary spending by audiences related to their visit (on hotels, transport, food and drink, etc), supply chain expenditure made by businesses that are catering for live event visitors, and the 'knock on' or secondary impacts of all visitor and supply chain spending." **BOP Consulting.**





## SPOTLIGHT:

## NORTHERN IRELAND

▲ Mrs Browns Boys, SSE Arena  
Photo credit: Patrick O'Leary

Belfast has many superb venues hosting live entertainment events including the Waterfront, the Ulster Hall and the Limelight all of which stage international and local touring artists and events ranging from music to comedy, theatre to dramatic arts and family attractions.

However, the recently upgraded SSE Arena located in the heart of Belfast and opened in December 2000 is Northern Ireland's best example of a world-class multi-functional venue with capacities ranging from 1,500 for an intimate theatre format up to as much as 10,800 for full concert setting. The venue has attracted some of the biggest names in entertainment and is firmly established as a key venue and fixture on major European and World tours which has seen the likes of U2, Adele, Rihanna, Lady Gaga, Pink, Bruce Springsteen, Oasis, Snow Patrol and Metallica visit. With the addition of comedy shows, family shows and musical/dance shows The SSE Arena, Belfast can provide a plethora of entertainment and enjoyment to both the people of Northern Ireland and tourists alike.

Belfast also plays host to music festivals including the internationally acclaimed Tennent's Vital music festival which has featured some major international names such as the Red Hot Chili Peppers, Avicii, Snow Patrol, The Script, The Killers: the Belsonic festival staged in Belfast City Centre which has featured the likes of Basement Jaxx, Stereophonics, Kasabian, Florence & the Machine, David Guetta and Noel Gallagher to name but a few.

Northern Ireland also hosts many more intimate live entertainment events throughout regional venues located in areas such as Derry which has the Millennium Forum Theatre, the Down Arts Centre in County Down: the Market Place Theatre & Arts Centre in Armagh which stages productions ranging from musicals, drama shows, comedy nights and music performances of all genre to appeal to all tastes.

**“** In the last 18 months alone we have performed Mrs. Browns Boys live to over one and a half million people across Canada, Australia, New Zealand and the U.K. Sure, they laugh and sure they enjoy themselves in the moment. But, the overwhelming feeling from the audience is "Ireland - I want to go there!" And they do, in their thousands, only to discover that we were just a tiny sample of the richness and breath of talent on this small green island of ours.”

**Brendan O'Carroll, Mrs. Browns Boys**

**“** The SSE Arena has been a huge success story enabling Belfast to attract some of the world's most famous and most popular artists, events and productions ranging from music, dance, theatre and family attractions thereby contributing significantly to the Northern Ireland economy. Working closely with Belfast City Council and Tourism NI, Belfast has hosted international artists and events such as MTV EMA's, X Factor, Disney on Ice, Mrs Brown's Boys, U2, John Bishop and Adele to name a few. The Arena contributes to improving the image of Belfast and provides a platform for portraying positive messages to the World”.

**Neil Walker,  
General Manager, SSE Arena Belfast**

## Republic of Ireland and Overseas Tourists lost to Northern Ireland

**Overseas** (i.e. from outside both Republic of Ireland & Northern Ireland):

Music = 53,975

Arts, Theatre & Comedy = 3,062

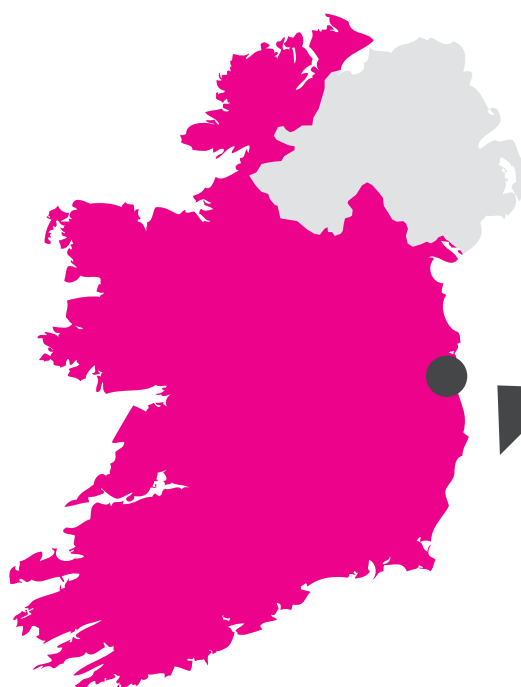
Family, Attractions & Exhibitions = 147

**From Rest of Republic of Ireland:**

Music = 16,191

Arts, Theatre & Comedy = 1,694

Family, Attractions & Exhibitions = 2,560



**From Dublin:**

Music = 5,568

Arts, Theatre & Comedy = 252

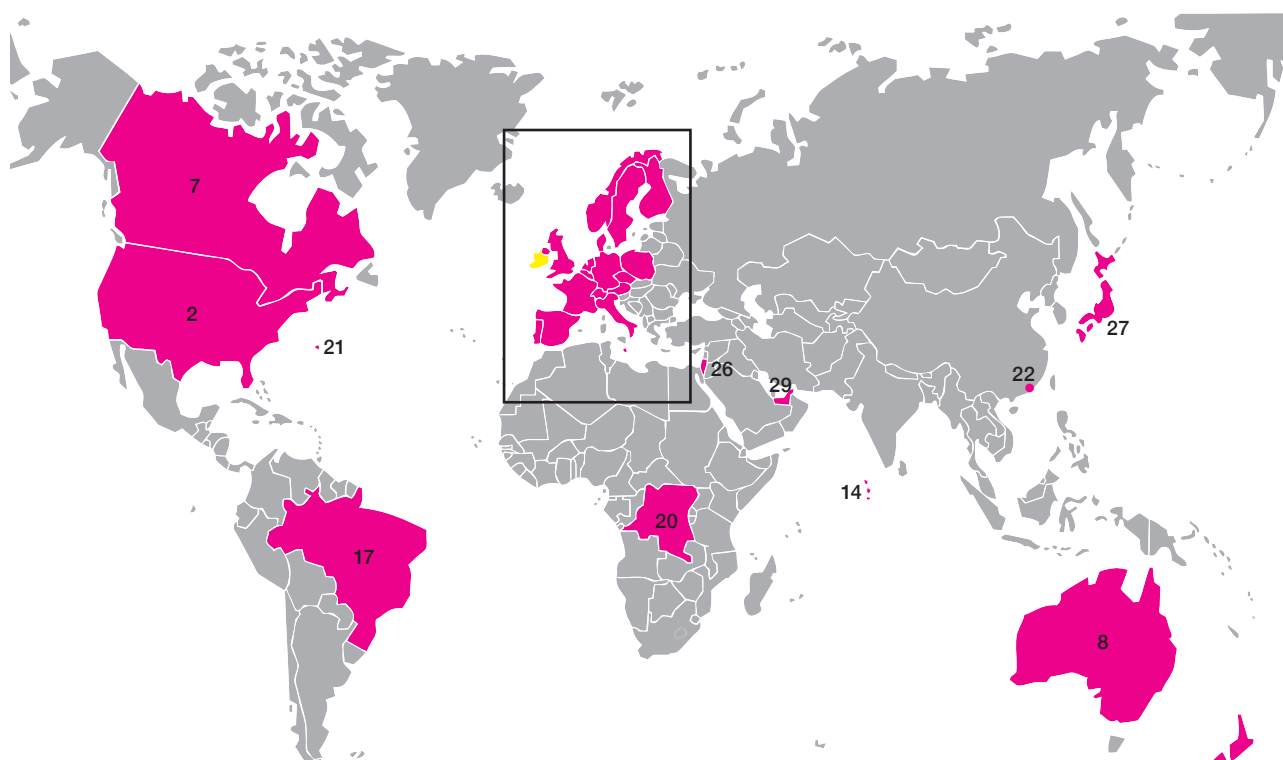
Family, Attractions & Exhibitions = 152

**Total:** 83,601 attendees lost to Northern Ireland



# Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourist's Insights and Economic Benefits

## Origin and Numbers of Overseas Tourists



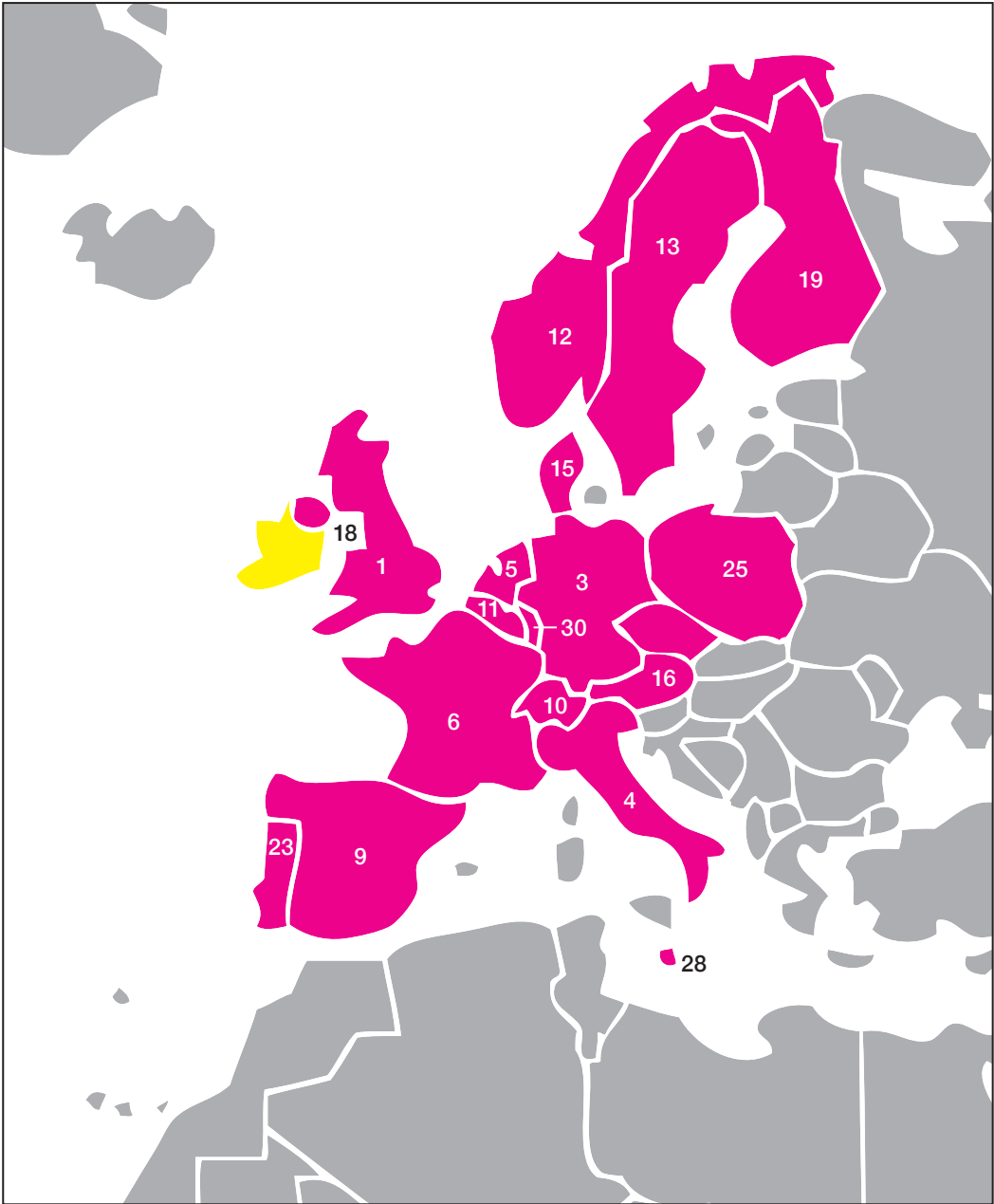
1. UNITED KINGDOM <i>excluding N.I.</i>	156,504
2. UNITED STATES	39,767
3. GERMANY	10,853
4. ITALY	8,709
5. NETHERLANDS	6,702
6. FRANCE	6,621
7. CANADA	6,189
8. AUSTRALIA	5,197
9. SPAIN	4,610
10. SWITZERLAND	3,338
11. BELGIUM	2,862
12. NORWAY	2,425
13. SWEDEN	2,344
14. MALDIVES	1,671
15. DENMARK	1,581
16. AUSTRIA	1,522

17. BRAZIL	1,240
18. ISLE OF MAN	1,205
19. FINLAND	1,030
20. CONGO, D.R.O	998
21. BERMUDA	913
22. HONG KONG	835
23. PORTUGAL	640
24. NEW ZEALAND	616
25. POLAND	603
26. ISRAEL	582
27. JAPAN	582
28. MALTA	573
29. UNITED ARAB EMIRATES	567
30. LUXEMBOURG	540
OTHER < 500 TICKETS	8,750
Grand Total	280,569

FACT

Worldwide Reason to Visit from UAE, Bermuda, New Zealand, Japan, US

Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourist Reviews and Endorsements





*"Great country and people."*

Australia



*"The night life was entertaining and there was a lot of music in the streets."*

Italy



*"Thoroughly enjoyed the festival."*

Netherlands



*"Good shopping centres, good theatre shows and nice restaurants."*

Germany



*"Absolutely lovely country & people."*

Spain



*"Fun, lively, great shopping."*

Canada



*"I will always spend some parts of my holiday there regardless where I'll live. I simply love Ireland."*

Finland



*"I find Irish audiences more lively than those abroad and the atmosphere at gigs is always great."*

United Kingdom



*"I love coming home to music and arts events. The ambiance in Ireland is hard to beat."*

Switzerland



*"Impressive, amazing and very welcoming. I'll be back."*

USA



“ There is a harp on the front of every Irish passport. Music is our shield our weapon and our identity. I feel that live music is art brought to life and no one does it better than Ireland. Simply put, Ireland is music.”













**Danny O'Donoghue** Musician,  
Singer & Songwriter **The Script**

“ Like sport, music has always been a statement of our cultural identity. As home of our national games, Croke Park is proud to have hosted some of the world's greatest singers and musicians. Every concert makes a significant economic contribution to our city's finances but moreover places Dublin as a must place to visit for the global music fan. I am delighted to contribute to what is an important report.”

**Peter McKenna**, Stadium &  
Commercial Director **Croke Park**


▲ The Script on stage, Croke Park  
Photo credit: Kathrin Baumbach

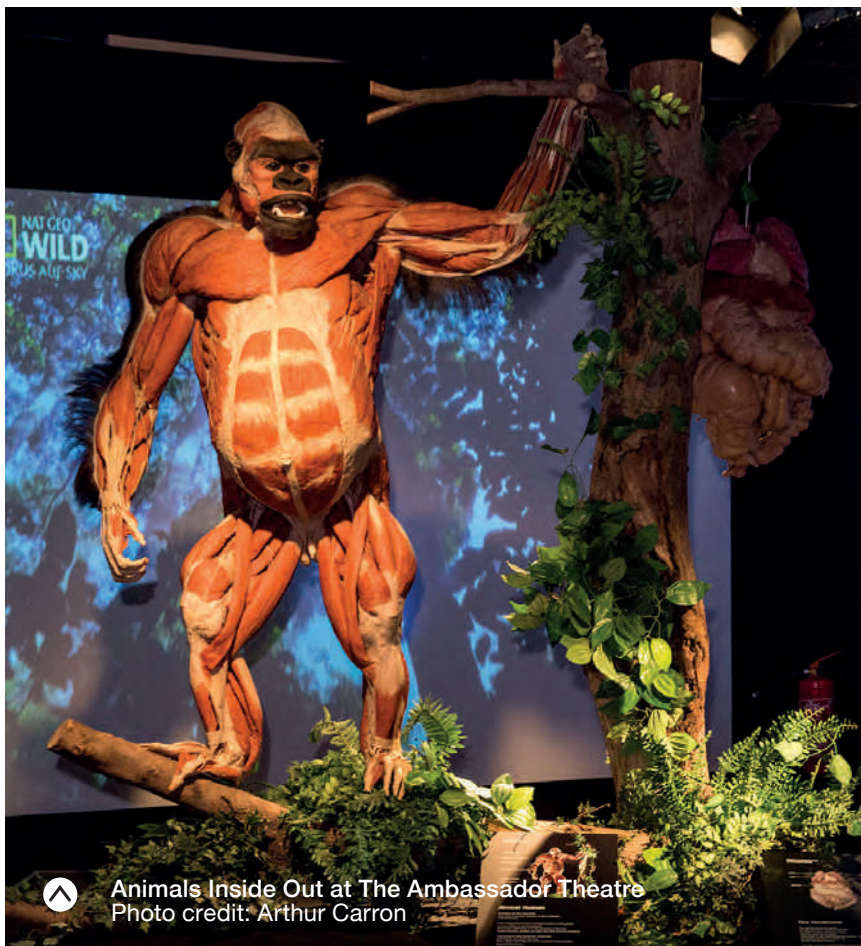
# Attendance by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists

BREAKDOWN			
Republic of Ireland	=	Dublin + Rest of Republic	Northern Ireland
Events			Events
MUSIC			
			
120,918 Tourists	94,139 Tourists	26,779 Tourists	53,975 Tourists
ARTS, THEATRE & COMEDY			
			
94,182 Tourists	88,672 Tourists	5,510 Tourists	3,062 Tourists
FAMILY, ATTRACTIONS & EXHIBITIONS			
			
8,284 Tourists	6,549 Tourists	1,735 Tourists	147 Tourists
TOTAL	223,384 Tourists		57,184 Tourists







**Cirque Du Soleil**  
 Photo credit: Jarid A. Barring




**Animals Inside Out at The Ambassador Theatre**  
 Photo credit: Arthur Carron


 When it comes to live entertainment Ireland punches way above its weight compared to other countries."

**Keith English, Managing Director, Ticketmaster Ireland**


 At Iarnród Éireann/Irish Rail, live entertainment events in Ireland (whether concerts, festivals, exhibitions and the like) are a major part of our service offering, bringing our customers to the spectacle and drawing national and international communities together."

















**Barry Kenny, Corporate Communications Manager, Iarnród Éireann.**


 Ireland is unique, the envy of other European countries, in that more people attend events per head of population than anywhere else in Europe, creating a whole event tourism industry."

**Paul Latham, COO Live Nation UK & Ireland**



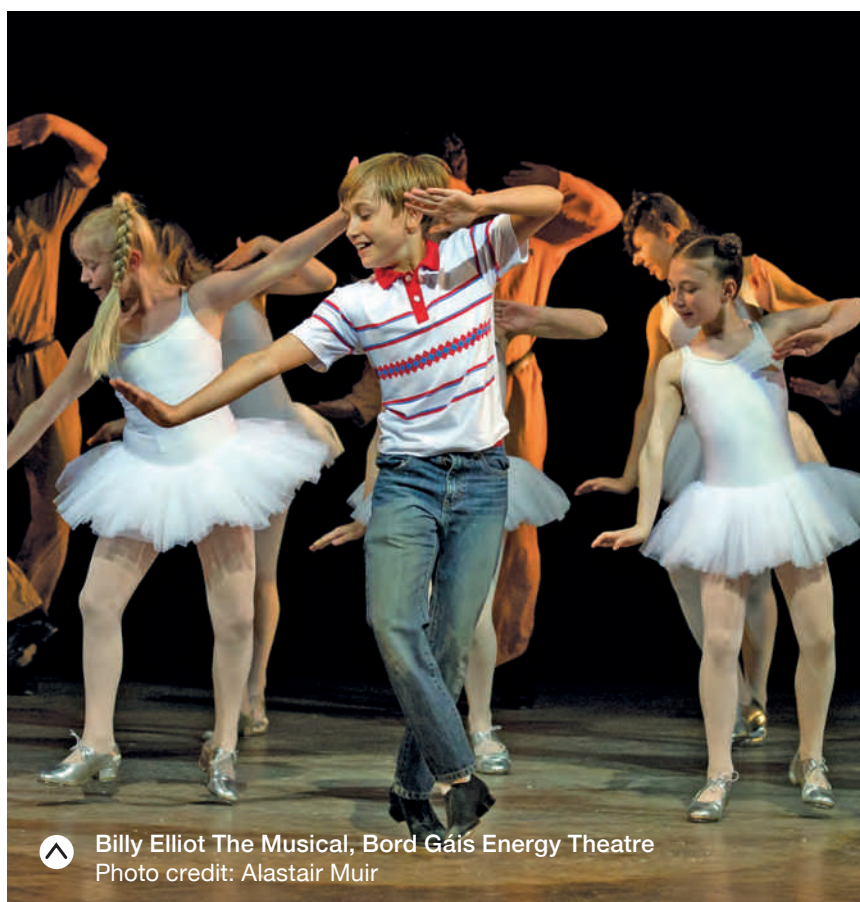
# Additional Revenue Generated by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists (€m)

BREAKDOWN			
	=	 + 	
Events			Events
MUSIC			
			
€60m	€39m	€21m	€23m
ARTS, THEATRE & COMEDY			
			
€31m	€28m	€3m	€1m
FAMILY, ATTRACTIONS & EXHIBITIONS			
			
€3m	€2m	€1m	€0.05m
TOTAL			€24.05m





▲ Andrea Bocelli, 3Arena  
Photo credit: Paulo Goncalves



▲ Billy Elliot The Musical, Bord Gáis Energy Theatre  
Photo credit: Alastair Muir

“The pub is THE centre of entertainment for tourists. Live entertainment and event tourism are significant contributors to the wellbeing of the pub trade and there is a perfect fit between these, the pub and the offering for tourists.”

**Padraig Cribben, Chief Executive, Vintners' Federation of Ireland.**

“Artists from all over the world say it again and again. Irish audiences are the very best. It may seem like a cliché but it makes a lot of sense. Ireland is steeped in a tradition of entertainment and every part of the country is catered for at different levels. The industry delivers and the people of Ireland, along with a growing number of other nationalities, are always ready for the next great performance.”

**Ian Dempsey, National Broadcaster**





# Additional Gross Value Added Generated by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists (€m)

BREAKDOWN			
<div><div>Republic of Ireland</div><div>=</div><div>Dublin</div><div>+</div><div>Rest of Republic</div></div>			<div>Northern Ireland</div>
Events			Events
MUSIC			
€25m	€16m	€9m	€9m
ARTS, THEATRE & COMEDY			
€12m	€11m	€1m	€0.4m
FAMILY, ATTRACTIONS & EXHIBITIONS			
€1m	€1m	€0.2m	€0.02m
TOTAL			€9.42m

✓ **Ed Sheeran**  
Photo credit: Kathrin Baumbach

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Photo: Ed Sheeran

Quote: Tom Dunne

“ I’ve always felt the big music festivals are like Cultural touchstones, true indicators of where we are as a society in our attitudes, tastes and beliefs.”

**Tom Dunne, National Broadcaster and Musician**

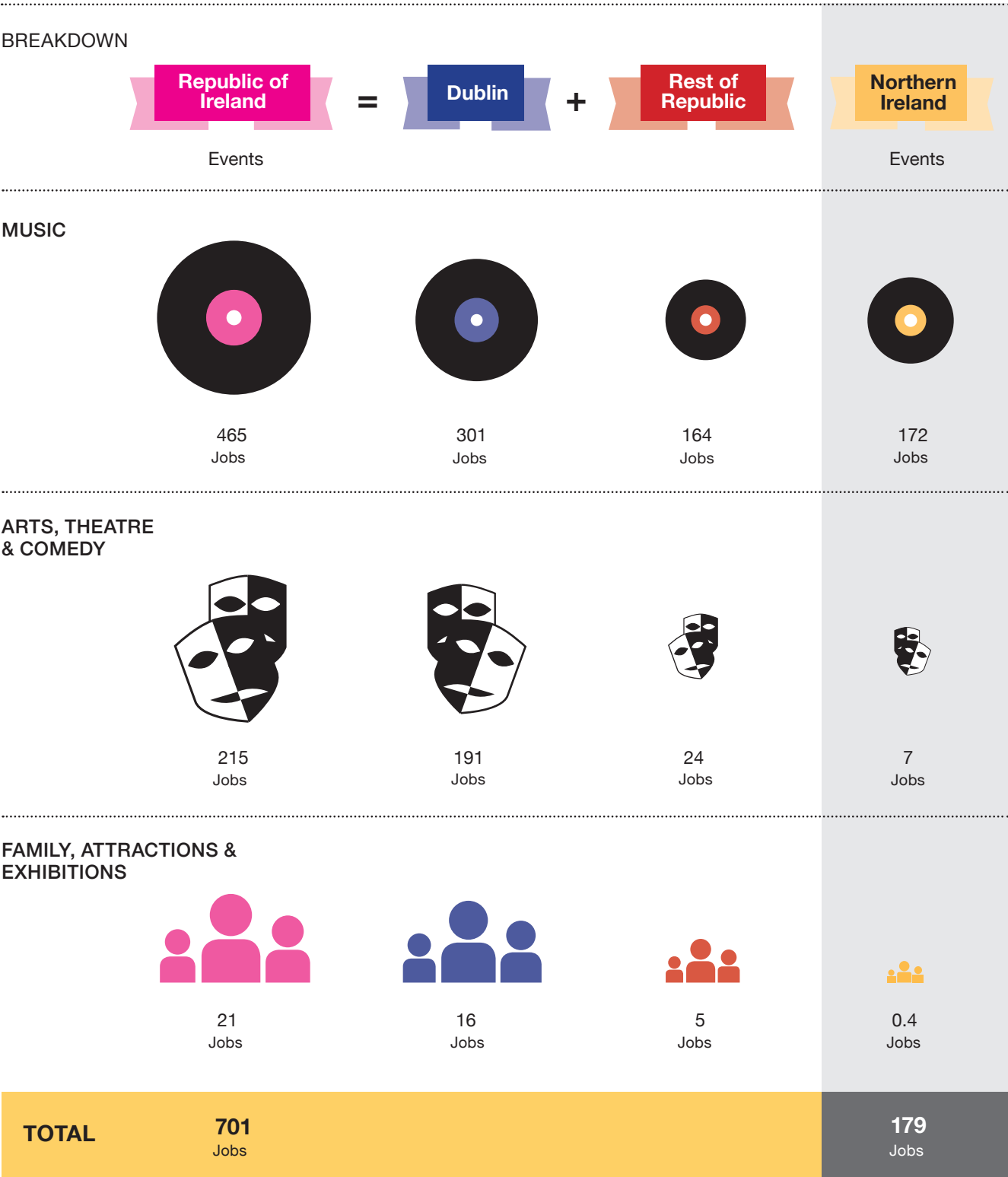
“ Live events, performances, exhibitions, concerts or installations in the Arts are the flowers on the plant whose roots are in every part of Dublin. Our diverse culture grows up and is sustained in families and schools and in our local neighbourhoods, at music and art classes and in the patient developmental work to build infrastructure and funding in local authorities and in important agencies like the Arts Council. To celebrate great performances is a wonderful and a fitting tribute to all who have the joy of performing, learning and experiencing culture in our Capital City.”

**Ray Yeates, City Arts Officer, Dublin City Council**





# Additional Employment Generated by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists





AC/DC, Aviva Stadium  
Photo credit: Kathrin Baumbach



Avicii, Marlay Park  
Photo credit: David Doyle

“Live entertainment, sports and event tourism provide the ideal platform to showcase Ireland and our rich cultural heritage.”

**Martin Murphy Stadium Director  
Aviva Stadium**

“Sea Sessions has been running since 2008 and during that time has provided a huge economic boost to the local economy in the North West. The festival attracts thousands of both domestic and international tourists over the years.”

**Ray O'Donoghue, Festival Director**

“Live events, especially music, theatre and sport, have a hugely positive economic impact in Dublin and greatly contribute to the vibrancy of the pubs and bars across our Capital City.”

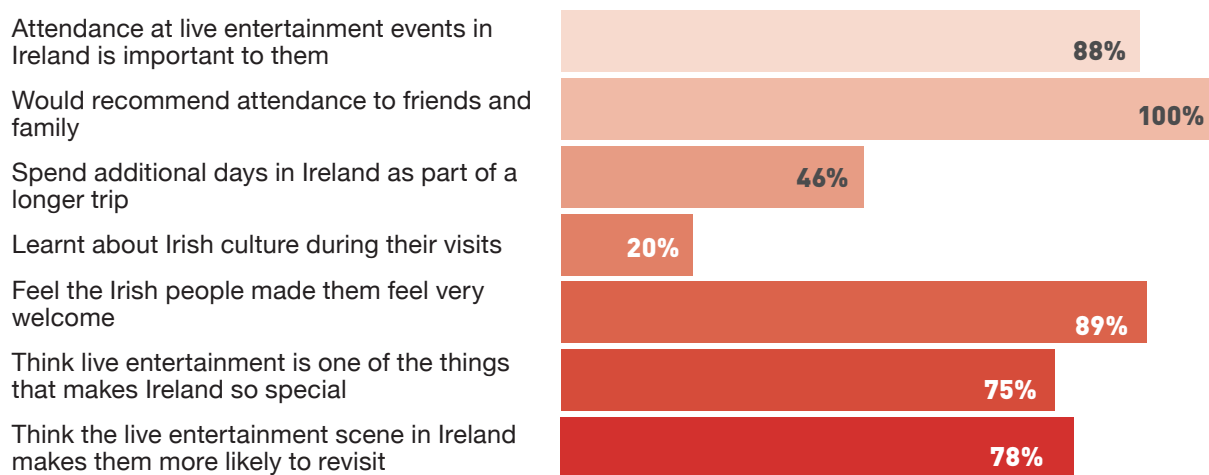
**Donall O'Keeffe, Chief Executive,  
Licensed Vintners Association.**



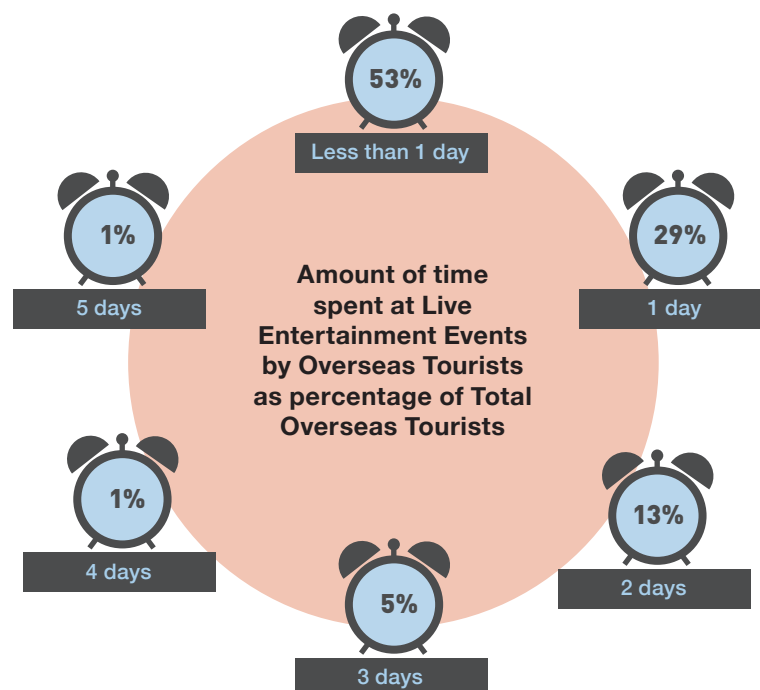


# Value placed on Live Entertainment Events by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists

The value that overseas (i.e. outside both Republic of Ireland & Northern Ireland) attendees place in Live Entertainment in Ireland



Proportion of attendees at live entertainment events:



✓ Panti Bliss aka Rory O' Neill launching The Outing Festival  
Photo credit: The Outing LGBT Music & Matchmaking  
Festival [www.TheOuting.lgbt](http://www.TheOuting.lgbt)



“ Since the referendum, Ireland has shown the world that its doors are open to the LGBT market, as more and more people from the gay, lesbian, bi and trans community come to Ireland not only to visit The Outing LGBT Music & Matchmaking Festival in Lisdoonvarna but to find love and even marry here. It is now up to us, and the wider tourism sector, to provide our famous C  ad M  ile F  ilte so that we can make the most of this opportunity.”

**Rory O'Neill aka Panti Bliss**

“ We are delighted to see the interest from so many countries in the world's only LGBT Music & Matchmaking festival here in Lisdoonvarna. We are delighted to be able to extend a big Irish welcome and to be able to entertain groups from all over Ireland and overseas visitors and media during their time in Ireland.”

**Eddie McGuinness,  
Director of The Outing Festival**





# Economic Conclusion from BOP Consulting



Kodaline, Royal Hospital Kilmainham  
Photo credit: Paulo Goncalves

This report has demonstrated that live entertainment is of great economic and cultural importance to the Republic of Ireland and Northern Ireland.

Over a recent 12-month period, live entertainment across the island of Ireland had over 4 million attendees at events ticketed by Ticketmaster. In total, these attendances generated over €1.7bn of additional revenue. In terms of the more economically robust metrics of Gross Value Added (GVA) and Full Time Equivalent (FTE) employment, this revenue equates to €669m of GVA and over 11,000 jobs.

In generating these figures, BOP has taken account of the direct, indirect and induced economic impacts of live entertainment. This means that, in addition to the impact of spending by attendees themselves (direct), we capture the supply chain impact of this spending by attendees (indirect) and the multiplied impact of additional spending in local economies generated by this direct and indirect spending.

Consistent with best economic practice, we report revenue, GVA and employment metrics after an additionality analysis. In other words, we asked our survey participants to consider what they would have done had the live entertainment event that they attended not occurred. In most cases, they reported that they would have stayed at home or found another live entertainment event to attend. This indicates that alternative leisure activities are generally considered poor substitutes for live entertainment and much of the spending associated with live entertainment would not occur if live entertainment did not exist.

International visitors make important contributions to the additional economic impact of live entertainment. From countries as far and wide as Brazil and New Zealand, Japan and the United States, 280,000 of them visited the island of Ireland in the 12 months under analysis. Amazingly, every single one of the international visitors that we surveyed would recommend attendance at a live entertainment event in Ireland to family and friends.

As a further demonstration of the cultural significance of live entertainment in Ireland, the vast majority of Irish attendees surveyed would similarly make this recommendation. Moreover, consistent with our economic finding that much of the spending associated with live entertainment can be considered additional and would not otherwise exist, around four in every five attendees at live entertainment events deem their attendance to be important or very important to them.

There is, therefore, much to celebrate in Irish live entertainment, both economically and culturally.

**BOP**  
Consulting



**Richard Naylor**  
Director, Research



**Jonathan Todd**  
Chief Economist



Jay Z, 3Arena

Photo credit: Paulo Goncalves

# Economic Methodology of Report from BOP Consulting

Two main data sources have fed into the analysis presented in this report:

- Information on ticket sales by Ticketmaster for relevant live entertainment events in the island of Ireland between 1 March 2015 and 29 February 2016. Live entertainment events were considered relevant when they were music; arts, theatre and comedy; and family, attractions and exhibitions. Sport was considered out of scope. As presented in this report, these figures were broken down by type of event, number of attendees, ticket sales generated by these attendees, and the geographic origin of these attendees, in terms of whether they come from inside the Republic of Ireland or from a country beyond this.
- We surveyed 5,764 attendees at events ticketed by Ticketmaster within the island of Ireland between 1 March 2015 and 29 February 2016.

The economic impact of live entertainment is assessed in terms of Gross Value Added (GVA). It is output (alternatively, referred to as revenue or turnover) minus intermediate consumption (alternatively, referred to as costs, excluding labour costs). It is a standard metric of economic analysis and in such analysis, three kinds of GVA impact are typically distinguished:

- First, the direct value added of live entertainment, i.e. spending by attendees during trips to attend live entertainment events.
- Second, the indirect impact on the GVA of firms in the supply chain of businesses that benefit from direct spending; and
- Finally, induced impacts on the GVA of firms outside the sector or supply chain, as a result of increased spending in the local economy due to wage expenditure associated with the direct and indirect impacts.

## BOP Consulting

BOP is an international consultancy specialising in culture and the creative economy. We are a research-led practice and have pioneered new methods of measuring the economic and social impacts of culture, in studies for organisations such as the Edinburgh Festivals, the BBC, Glyndebourne, WOMAD and UK Music. BOP worked with the London Development Corporation on developing an events strategy for the Olympic Park post-Games. BOP also deploys its commercial expertise to emerging trends in digital content and technology to carry out feasibility studies and market testing of new commercial and consumer propositions for a range of industry partners including Battersea Power Station, Lucent Group, Lucie and Inception VR. Internationally, we work with world City governments, national culture ministries, major property developers and multilateral bodies such as UNESCO and the European Commission.

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This analysis moves to estimates of GVA - as well as associated employment in Full Time Equivalent (FTEs) terms - by quantifying relevant revenue and then translating these revenues into GVA and FTE. The starting point for building up this picture of revenue is the box office data shared by Ticketmaster.

Our survey of 5,764 live entertainment attendees allowed us to estimate what proportion of spending by attendees is attributable to their spending on their tickets, as well as on other items of expenditure associated with their attendance at the live entertainment event (e.g. food/drink, accommodation, travel). In line with what we know about total box office spending from Ticketmaster and what our survey told us about the relative size of spending on tickets compared to other items of expenditure, we estimated the total size of expenditures on these other items.

This spending on tickets and other items by attendees constitutes the direct economic impact of live entertainment. We assessed how much of this impact can be considered economically additional – that is to say, spending that would not have occurred if the live entertainment event did not occur. To do this, we asked what respondents would have done had they not attended the live entertainment event. Where they indicated that they would have stayed at home, gone to work, or travelled outside of Ireland, we considered their spending additional. Where they would have gone on another leisure activity within Ireland, the spending on live entertainment in Ireland is displacing spending on these leisure activities and is not treated as additional.

Having estimated the extent of direct, additional revenue, we estimate the second-round spending that would follow from these levels of consumer spending by drawing upon data contained in the latest edition of the Business Aggregates for all Service Enterprises ('the Aggregates'), which is maintained by the Central Statistics Office in the Republic of Ireland. We reviewed the Aggregates to find the industrial category most likely to contain the kind of businesses that would have benefitted from this direct, additional

revenue. Then we used the Aggregates to take a ratio for each of these categories on turnover, which would have been added to by the consumer spending, and business purchasing.

Having derived the indirect revenues that are relevant to our model (i.e. business purchases), we sum direct and indirect revenues and apply a sub-regional multiplier to the total. The sub-regional multiplier is 1.28 and was taken directly from the Business Aggregates. The multiplier gives us the total relevant revenues, while subtracting direct and indirect elements from this total reveals the induced element.

Having derived the total relevant revenues, we used relevant ratios from the Aggregates to convert these values into GVA and FTE metrics.

It should also be noted that the following regional definitions have been used in this report:

1. The 'Island of Ireland' includes both the Republic of Ireland (Euro currency areas) and Northern Ireland (Sterling currency areas).
2. 'Northern Ireland' includes all regions within the 6 counties situated north of its border with the Republic of Ireland.
3. "Overseas" includes all regions situated outside both the Republic of Ireland and Northern Ireland.
4. 'The Republic of Ireland' includes all regions within the 26 counties situated south of its border with Northern Ireland.
5. 'Dublin City' comprises all areas which are located within the traditional Dublin postal districts (Dublin 1-24 inclusive).
6. 'Dublin County' comprises all areas which are located outside Dublin City as defined above.
7. 'Rest of Ireland' means all of the regions not included within Dublin City and Dublin County.





*"Playing at home is always a joy; it's not like anywhere else, it's a different energy. We have some amazing audiences and incredible support in America and the UK, but home is home."*

**Hozier Musician,  
Singer & Songwriter**

*'Longitude's international appeal and line up attracts thousands of visitors to County Dublin each year'*

**Zach Desmond,  
Longitude Promoter**



Hozier at Longitude Festival, Marlay Park.  
Photo credit: Paulo Goncalves