

CONFIDENTIAL

**Ulster Football Senior Championship Final,
St Tiernach's Park, Clones
Sunday 12th May 2024
The Economic Impact**

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EXECUTIVE SUMMARY

- This report presents the findings from research designed to estimate the economic impact of The Ulster Football Senior Championship Final, held in St Tiernach's Park, Clones on Sunday 12th May 2024. The research was commissioned by the Gaelic Athletic Association and was undertaken by Simon Shibli and David Barrett of the Sport Industry Research Centre (SIRC) at Sheffield Hallam University. The methodology is consistent with www.eventIMPACTS.com guidance.
- A total of **461** usable surveys was conducted with spectators at St Tiernach's Park during the event, supplemented by a further **147** questionnaires completed online, giving a total sample of **608** spectators. The additional expenditure associated with groups such as volunteers, contractors and on site staff was measured via an additional survey of 81 people and an analysis of income and expenditure. Thus, there is robust data upon which to base the economic impact calculations for the Final.
- The economic impact of the event can be summarised as a €1.5m economic benefit for Clones and a €2.1m benefit for Co. Monaghan. This finding may be regarded as a welcome bonus, as the main purpose of the event is to stage an occasion befitting the final of Ulster's provincial football championship, rather than an explicit attempt to generate economic impact. The impact of the event is all the more notable for the size of the crowd relative to the population of Clones.
- Analysis of spectator data reveals a group of supporters dedicated to following their respective teams. The majority of spectators at the event were attending their third game in the Ulster Football Senior Championship. Almost all supporters (99%) stated that they were likely or very likely to attend further matches in the All-Ireland Series.
- The level of engagement with a range of activities underlines the commitment to club and county. Spectators at the Ulster Final spend an average of just over 9 hours and €45 per week playing, spectating, coaching, officiating and volunteering in support of Gaelic Games

1. INTRODUCTION

- 1.1. This report presents the findings from research designed to estimate the economic impact of the Ulster Football Senior Championship Final, held in St Tiernach's Park, Clones on Sunday 12th May 2024. The research was commissioned by the Gaelic Athletic Association (GAA) and was undertaken by Simon Shibli and David Barrett of the Sport Industry Research Centre (SIRC) at Sheffield Hallam University.
- 1.2. The calculation of economic impact is in accordance with the economic strand of *eventIMPACTS*¹ - the national event evaluation framework developed by SIRC for UK Sport and its national and regional partners. The eventIMPACTS methodology is widely recognised internationally as a 'gold standard' methodology that provides clients with a credible 'at least' economic value of their event that is underpinned with a transparent audit trail of supporting evidence. Economic impact, in this context is defined as "additional expenditure generated in the defined host economy by non-local, event-specific, visitors and by organisers (Ulster GAA and its subcontractors) that would not have occurred in the absence of the event". It has been calculated at two levels of geography: locally for **Clones**; and, for the wider **Co. Monaghan** sub region.
- 1.3. To clarify further how the economic impact calculations have been structured relative to the two impact areas under consideration, we offer the following examples. Spending in Clones by someone from (say) Scotstown attending the Final would be eligible for inclusion in the local economic impact estimate for Clones but would be excluded from the estimate for Co. Monaghan. Any event-related expenditure elsewhere in Co. Monaghan, for example Carrickmacross, that originates from outside the region would be included in the estimate at sub regional level only.
- 1.4. The treatment of expenditure depending on its origin and destination is illustrated in Figure 1. Apart from the spending that originated from within each catchment area, the economic impact estimates also exclude spending by 'casual' visitors, that is, people whose attendance at the Final was incidental to their visit to Clones.

Figure 1 - Expenditure by geography

		Destination of expenditure (host economy)	
		Clones	Co. Monaghan
Origin of Expenditure	Clones	x	x
	Co. Monaghan	✓	x
	Elsewhere in Ulster	✓	✓
	Elsewhere	✓	✓

¹ <http://www.eventimpacts.com/impact-types/economic>

2. BACKGROUND

- 2.1 The Ulster Football Senior Championship Final is the annual climax of the premier provincial inter-county Gaelic football competition. The tournament is a knock-out competition, featuring the nine counties of Ulster, and culminates at the St Tiernach's Park ground in May, having moved from its traditional date in the calendar of the third Sunday in July. Clones has played host to the final since 2007, with the exception of 2020 when the game was played behind closed doors in Armagh due to Covid-related restrictions, and 2021 when the final was moved to Croke Park in Dublin.
- 2.2 The Ulster Championship final is organised by the Ulster Council of the GAA (Ulster GAA) in partnership with St Tiernach's GFC. The championship is traditionally considered one of the most challenging of all four provincial inter-county competitions and in recent years winning teams have gone on to find success in the All-Ireland championship, winning the Sam Maguire Cup on seven occasions since the beginning of the new millennium.
- 2.3 On Ulster Final Sunday, the attention of Ireland's sporting public is firmly fixed on Clones. The game attracts considerable media interest from across the island of Ireland, with live television coverage on both the RTÉ and BBC Northern Ireland networks, in addition to national and local radio broadcasters.
- 2.4 The town of Clones has a particular significance to football in Ulster, having hosted the final of the Championship more times than any other venue. Clones effectively becomes home to a one-day festival for GAA fans, who traditionally congregate in the bars surrounding the town's main square (known as the Diamond), and move steadily down Fermanagh Street and up Church Hill towards the ground in time for the throw in. This route is lined with fast food stalls and pop-up sellers of flags and other paraphernalia.
- 2.5 The volunteers and paid staff working at the event typically arrive early on the day of the game, with the exception being ground staff and broadcast technicians. Entertainment is laid on in advance of the game to encourage spectators to enter the stadium in good time. Families with young children bring picnics and packed lunches, partly to manage the overall cost of the day and partly because the facilities at ground are limited and the town is well known to be congested on Ulster Final day.
- 2.6 St Tiernach's Park holds up to 29,000 spectators, which is a reduction in capacity of 7,500 from its peak of 36,500, imposed as a result of increasingly stringent health and safety regulations. The size of the ground is all the more remarkable given the population of the town, which stands at just under 2,000 people². The majority of spectators are accommodated on open terraces with covered seating on one side of the ground only. Tickets for the game, which had to be purchased online in advance, typically cost €35-40 for adults, €25-30 for concessions and €5 juveniles. The event is staffed primarily by volunteers from Clones GAA club, Monaghan and from across Ulster.
- 2.7 The geography of the town is such that road access is severely constrained, and a traffic management plan is put in place by An Garda Síochána. Drivers are directed towards the many official and unofficial car parks in and around Clones. Congestion after the game is significant, leading to long delays on departure.

² <https://visual.cso.ie/?body=entity/ima/cop/2022&boundary=C04160V04929&guid=c52070a9-b558-4746-8f10-48f068982cad>

- 2.7 This report focuses primarily on the economic impact of the event, but also includes feedback on certain aspects of spectator engagement, notably:
- Attendance at matches in the Ulster Championship and All-Ireland Series
 - Measures of time and money spent per week engaging with Gaelic games in various ways: participation, spectating, coaching, officiating and volunteering.

3. METHODS

3.1. A combination of fieldwork and desk research was used to derive the economic impact of the Ulster Football Senior Championship Final on Clones and the wider Co. Monaghan economy. Primary data were collected from spectators in and around St Tiernach's Park using a team of research assistants from Sheffield Hallam University, and Ulster University who recruited respondents by inviting them to fill in a paper-based self-completion survey. A copy of the questionnaire is available in Appendix A and was designed to capture the key information listed below.

- Respondents' broad place of residence to identify those eligible for the economic impact calculation;
- For visitors from outside the 'local' area, whether the event was their main reason for being in the area to exclude 'casuals';
- Whether respondents were staying overnight, the location and length of overnight stays, the type of accommodation used, plus associated spending; and,
- Expenditure on other items (e.g. food and drink, shopping etc.) at St Tiernach's Park, in the wider Clones area as well as in the Co. Monaghan region.

This information was used alongside official spectator attendance figures provided by Ulster GAA to model the additional expenditure attributable to spectators in the host economy.

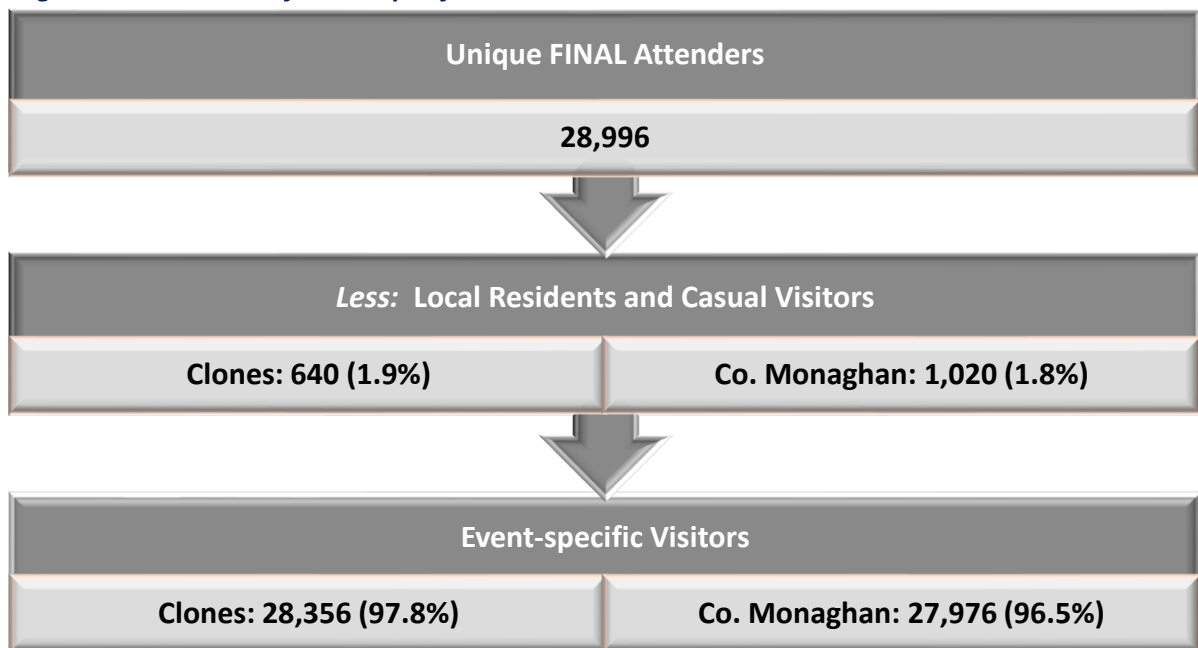
- 3.2. A total of **461** usable surveys was conducted with spectators at St Tiernach's Park, supplemented by a further **147** completions of an online version of the questionnaire, giving a total sample of **608** spectators. Results based on a random sample of this size are subject to a maximum sampling error of +/- 3.9 percentage points at the 95% confidence level. Thus, there is robust data upon which to base the economic impact calculations for the Final.
- 3.3. The additional expenditure associated with groups such as contractors and on site staff was measured in two ways. First, a brief survey was carried out at the venue on the day preceding the event and on the day of the Final itself. Around 80 respondents were interviewed, (Appendix C). Second, organisers' spending in the Clones and Co. Monaghan economies was estimated based on analysis of the event's budget. We have not had full access to the event's budget and spending patterns, but through discussions with event organisers, as well as what some contractors have been prepared to disclose, it has been possible to piece together a credible estimate for how much of the event's economic activity was retained within Clones and Co. Monaghan.

4. ECONOMIC IMPACT FINDINGS

Match Spectators

- 4.1. Admissions to the Ulster Football Senior Championship Final at St Tiernach's Park were recorded as **28,996**. For a one-day event we know that the 28,996 admissions were made by 28,996 unique individuals. However, the important point of note is that often certain people spend money on behalf of others and therefore any expenditure made must be down weighted by the number of people on whom it was made. As an example, if a hotel room for two people is €100 per night, then the spend per person per night is €50.
- 4.2. Overall, 2.2% of match attendees were either normally resident in Clones (locals, 0.3%) or were not present in the area specifically to attend the game (casuals, 1.9%). Thus, the impact calculation for Clones is based on **28,356** non-local, event-specific visitors (i.e. 28,996 less 2.2% deadweight). The impact calculation for Co. Monaghan is based on **27,976** event-specific visitors, since 3.8% of the survey respondents resided in Co. Monaghan (1.8%) or were casuals (1.7%). A full breakdown is shown in Figure 2.

Figure 2 - Derivation of Event-Specific Visitors



- 4.3. Based on the spectator survey, we found that 4.4% of event-specific visitors to Clones stayed overnight in paid accommodation locally, for an average of 1 night at a cost of €29 per person per night (PPPN). The associated revenue for local accommodation providers in Clones is estimated at **€11,006**. The corresponding estimate for the accommodation sector in the Co. Monaghan economy is **€87,332** based on 1,345 commercial bed nights in the region at an average of €65 PPPN - see Table 1.

Table 1 - Accommodation spend by event-specific visitors

	Clones	Co. Monaghan
Overnight commercial stayers	375	1,220
Average trip duration (nights)	1.00	1.11
Commercial bed nights	375	1,349
Cost per bed night	€29.35	€64.74
Accommodation spend	€11,006	€87,332

- 4.4. Table 2 shows the expenditure by all event-specific attendees (including overnight commercial and non-commercial stayers as well as day visitors) on items other than accommodation, such as food and drink, shopping, and local travel at the two levels of geography. On average, each event-specific visitor was worth €43.91 per day to the Clones economy and €52.00 per day to the Co. Monaghan economy. In aggregate terms, this equates to spending of c. **€1,245,126** and c. **€1,461,518** at local and sub-regional level respectively.

Table 2 - Non-accommodation spend by event-specific visitors

	Clones	Co. Monaghan
Event-specific visitors (from Figure 2)	28,356	27,976
Average trip duration (days / nights)	1.00	1.00
Total day visits / bed nights	28,356	28,105
Non-accommodation spend per day / night	€43.91	€52.00
Non-accommodation spend	€1,245,126	€1,461,518

- 4.5. Combining the data in Table 1 (accommodation) and Table 2 (other spend), the additional expenditure by event-specific visitors amounted to **€1,256,132** in Clones and **€1,548,850** in Co. Monaghan as shown in Table 3.

Table 3 - Additional expenditure by event-specific visitors

Item	Clones	Co. Monaghan
Accommodation spend	€11,006	€87,332
Other spend	€1,245,126	€1,461,518
Total spend	€1,256,132	€1,548,850

Event Workforce - Volunteers, Media and Other Staff

- 4.6. The event was delivered by a combined workforce of 795 professional staff and voluntary stewards and officials. Paid staff working over the weekend of the event included employees of media organisations such as radio and television broadcasters, as well as members of the national and regional press. Volunteers working on the day of the final included stadium stewards, turnstile operators, officials of the provincial board, and members of Clones GAA club providing catering services.

- 4.7. The analysis of spectator spending data was replicated for the event workforce and the survey questionnaire can be seen in Appendix B. In total, only 1.3% of the workforce were local residents of Clones. The estimate of the impact on Clones is therefore based on **785** non-local volunteers, media and other staff, while the figures for Co. Monaghan are based on **616** members of the workforce, (22.5% of the survey respondents being residents of the county).
- 4.8. According to the workforce survey, 3.8% of the event staff stayed overnight in paid accommodation in Clones, for an average of 1 night at a cost of €90 per person per night (PPPN), producing additional revenue for local accommodation providers of **€2,683**. In Co. Monaghan, the workforce generated 149 commercial bed nights at an average of €84 PPPN, giving a figure of €12,583 in revenue for accommodation providers.
- 4.9. Each member of the workforce spent an average of €30.67 per day in the Clones economy and €49.60 per day in the economy of Co. Monaghan. This amounts to a total of **€24,079** in the town and **€30,562** in the county.
- 4.10. Combining the accommodation and other spending, additional expenditure by the event-workforce amounted to **€26,762** in Clones and **€43,145** in Co. Monaghan as shown in Table 4.

Table 4 - Additional expenditure by event workforce

Item	Clones	Co. Monaghan
Accommodation spend	€2,683	€12,583
Other spend	€24,079	€30,562
Total spend	€26,762	€43,145

Organisers

- 4.7. The spending of visitors shown in Tables 1-4 excludes ticket revenue income and how it was used by the organisers in terms of where it was spent. It is known that 28,996 tickets were sold for the event, and that the total revenue from ticket sales was **€552,793**, giving an average price per admission of €19.06 (i.e. €552,793 / 28,996). Table 8 outlines how this money was used and how it benefited the economies of Clones and Co. Monaghan is shown in Table 5.

Table 5 - Total income, expenditure and economic impact attributable to the organisers

	€s	Clones	Co. Monaghan	Ulster
Ticketing costs	€33,168	€0	€0	€33,168
Venue costs	€92,596	€82,919	€92,596	€92,596
Other costs	€55,153	€0	€0	€55,153
Totals	€180,917	€82,919	€92,596	€180,917

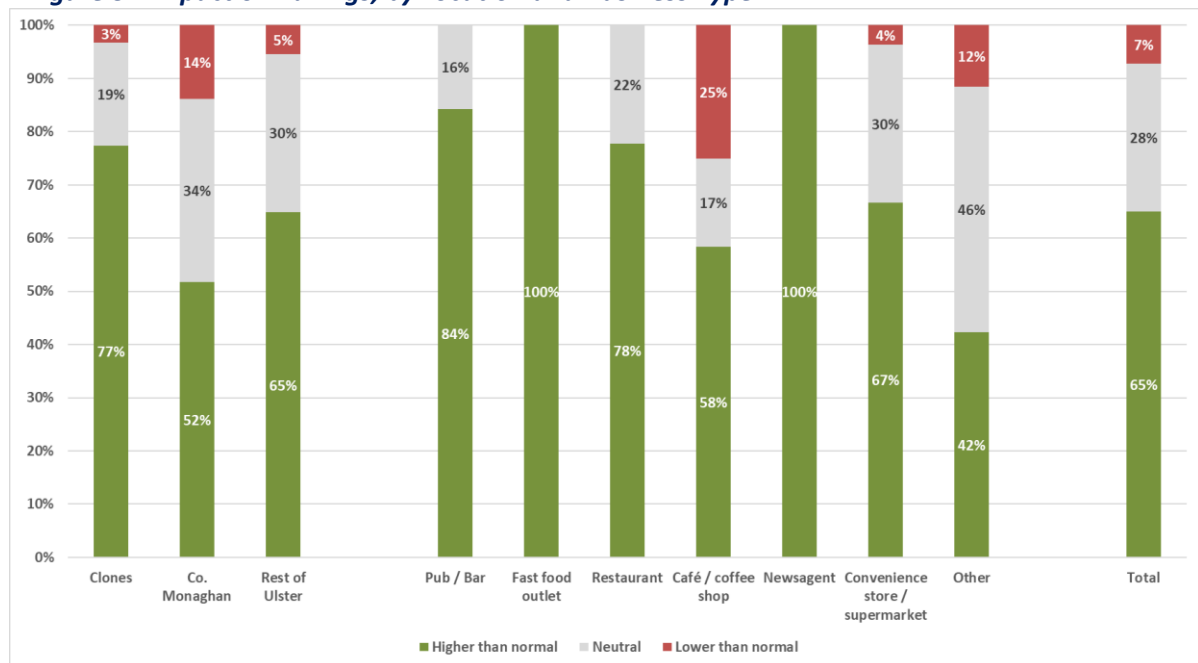
- 4.8 The data in Table 5 is derived from event accounts shared by Ulster GAA. The economic impact of the event made by organisers spending income derived from ticket sales was **€82,919** in Clones with an additional **€9,677** spent in Co. Monaghan, giving a total Co.

Monaghan benefit of **€92,596** (i.e. €82,919 plus €9,677). Venue costs were almost entirely accounted for by stadium hire fees, while ticketing costs relate to commission fees paid to resellers. Other costs included expenditure on production, artists fees (for pre-match entertainment, promotion and marketing). It is notable that with the exception of venue costs, the majority of expenditure on the event and the operational surplus generated from ticket sales has accrued to the rest of Ulster, rather than Clones or Co. Monaghan.

Businesses

4.9 Researchers were active in Clones and the surrounding areas in the days preceding the game, talking to 99 local businesses about the impact of the Ulster Senior Championship Final on trade. Particular attention was paid to business on traditional ‘pilgrimage routes’ to Clones from Armagh and Donegal. Businesses (primarily pubs, cafes and convenience stores) as far afield as Enniskillen to the west, Cavan to the south and Monaghan town to the east were surveyed for this reason. The survey questionnaire can be seen in Appendix C.

Figure 3 - Impact on Takings, by Location and Business Type



4.10 Figure 3 shows that the clear majority of traders (65%) expected higher takings than a normal Sunday. Traders in Clones (77%) are more likely to be busier than normal in comparison with those elsewhere in Co. Monaghan (52%) or the rest of Ulster (65%). Indeed, one in seven businesses in Monaghan (mostly in the town itself) said that they expected to be quieter than usual. It is also notable that so many traders on the pilgrimage routes through Ulster expected their takings to be higher on the day.

4.11 Pubs and bars, fast food outlets, restaurants, and newsagents were almost unanimous in reporting a positive impact on trade from the Ulster Final, while one in three cafes and coffee shops expected to be quieter than usual (notably, these were located in the towns of Monaghan and Cavan). Similarly, 30% convenience stores and supermarkets in the same locations reported a neutral effect on trade.

4.12 Qualitative feedback from traders noted that for many businesses in Clones, Ulster Final was one of the busiest days of the year. This view is reflected in the need to deploy extra

resources to cope with the additional trade, averaging 17.6 hours of staff time, equivalent to €226 per business. There was also strong evidence that businesses in Clones changed their operations to make the most of the trading opportunity. Several hotels and bars closed their restaurant areas in favour of serving food and drink from temporary stands, while newsagents and convenience stores focussed on selling ice creams and snacks.

- 4.13 Interestingly, some pubs in Clones and supermarkets elsewhere indicated to researchers that the timing and patterns of trade shifted over the weekend, with local custom higher on the Saturday before the game, but almost absent on the day itself. Bars located on the pilgrimage routes forecast higher trade, especially if supporters of the winning county passed through on their return from the game.

Total Direct Economic Impact

- 4.14 The direct economic impact of the Ulster Football Senior Championship Final at St Tiernach’s Park on 12th May 2024 on Clones and Co. Monaghan is summarised in Table 6. The additional visitor, workforce and organisational expenditure in Clones and the wider Co. Monaghan economy is estimated at **€1,365,813** and **€1,684,591** respectively. For the economy of Clones, the principal effect is from spectators, as local businesses were not directly involved in the staging of the event. Local businesses did however benefit from incidental expenditure made by the organisers on hotels, bars and subsistence. Co. Monaghan benefits from the spillover effect from Clones which is unable to absorb the economic ‘shock’ of the Final itself, leading to the additional demand for goods and services rippling outwards into surrounding areas.

Table 6 - Direct Economic Impact Summary

Group	Clones	Co. Monaghan
Match spectators	€1,256,132	€1,548,850
Volunteers, Media and Other	€26,762	€43,145
Organisers	€82,919	€92,596
Direct Economic Impact	€ 1,365,813	€ 1,684,591

Total Economic Impact

- 4.15. It is conventional to convert Direct Economic Impact into Total Economic Impact to estimate the Indirect and Induced impacts using ‘output multipliers’. Multipliers are used to account for the supply chain and higher income effect that a significant event brings. For example, bars and restaurants will buy additional stock in preparation for the event, generating a positive impact on the supply chain, both locally in the town and further afield. These are known as "indirect" effects. Similarly, there is a "induced" effect whereby employees in the town who work more hours and earn higher wages will use some of that money locally for other goods and services. The value of the multiplier used to estimate the indirect and induced effect is dependent upon on the size of the economy, since smaller economies have less capacity to retain the additional spending generated by the event. For Clones we have used a modest output multiplier of 1.1 and for Co. Monaghan the value used is 1.25 as shown in Table 7.

Table 7 - Total Economic Impact Summary

Group	Clones	Co. Monaghan
Direct Economic Impact	€ 1,365,813	€ 1,684,591
<i>Multiplier</i>	<i>1.1</i>	<i>1.25</i>
Indirect and Induced Effects	€ 136,581	€ 400,418
Total Economic Impact	€ 1,502,394	€ 2,105,739

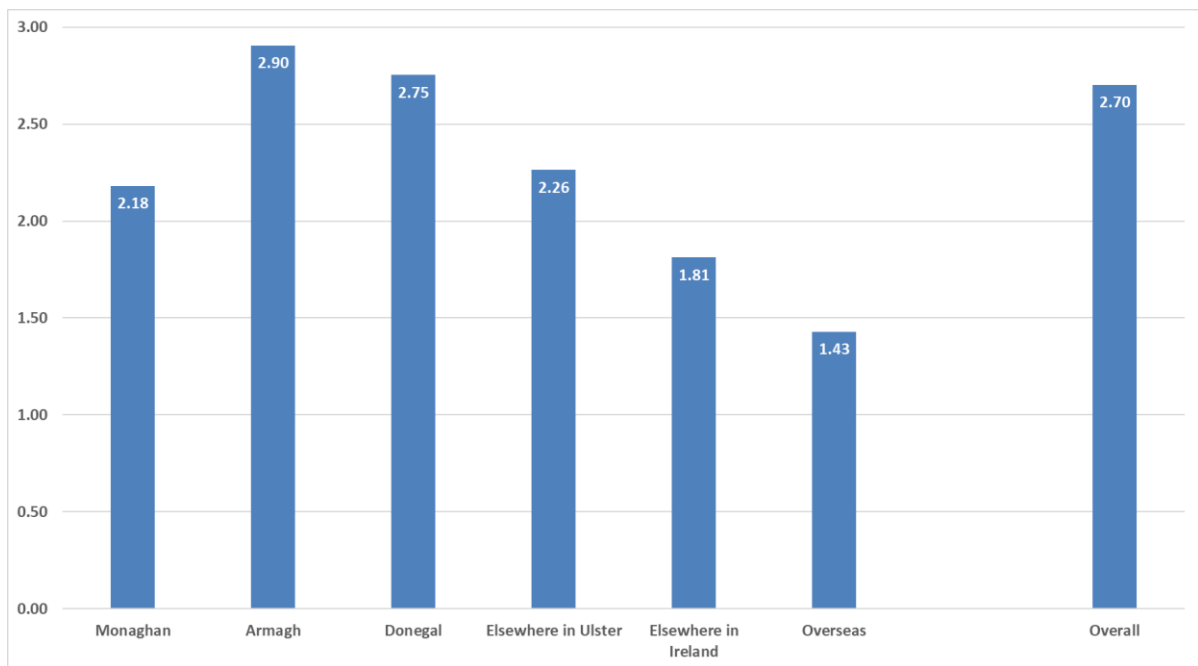
4.16 The economic impact of the event can be summarised as a €1.5m economic benefit for Clones and a €2.1m benefit for Co. Monaghan. This finding may be regarded as a welcome bonus, as the main purpose of the event is to stage an occasion befitting the final of Ulster's provincial football championship, rather than an explicit attempt to generate economic impact. The impact of the event is all the more notable for the size of the crowd relative to the population of Clones. If we consider just the €1.365m of direct economic impact in Clones and assume a population of 2,000 people, the economic impact of the event equates to €683 per resident.

5. FURTHER AUDIENCE INSIGHTS

Attendance at Other Ulster Championship Matches

5.1. Event organisers were keen to gather additional insight into engagement with both the Ulster Championship and the All-Ireland Series. The majority of spectators (62%) attended three games in the Ulster Championship, including the Final. Figure 4 shows that on average Ulster-based fans attended at least two games in the Championship (2.18 in Monaghan and 2.26 elsewhere), with figures for fans of Armagh (2.9) and Donegal (2.75) suggesting that they watched their teams in all three rounds. Spectators from elsewhere in Ireland (1.81) and from overseas (1.43) attended fewer Ulster Championship games. A provincial final may be enough of a 'draw' to make the journey worthwhile, but the logistics and financial costs of going to earlier rounds force spectators from other provinces to be selective in deciding which fixtures to attend, particularly when other games are available to watch locally.

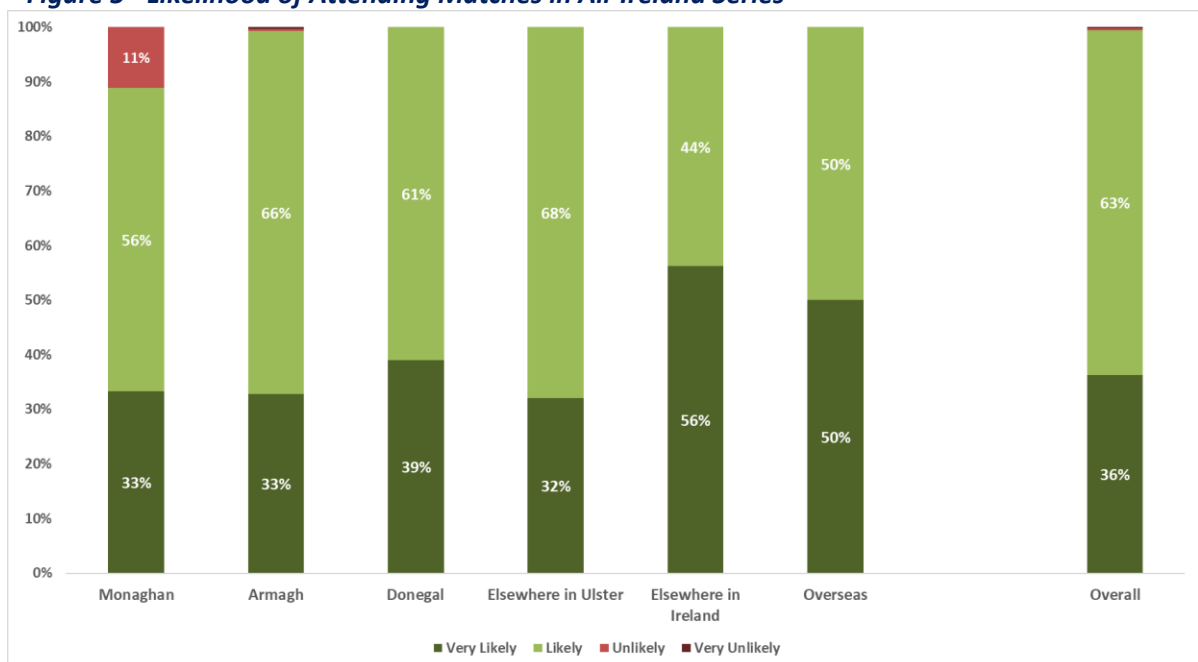
Figure 4 - Matches attended in the Ulster Championship



Intention to Attend All-Ireland Series

5.2. Both finalists were automatically eligible to proceed to the group phase of the All-Ireland Series, and spectators were also asked how likely they were to attend one or more of these games. Figure 5 outlines the responses and demonstrates the high level of commitment of supporters of the competing teams and others attending the Ulster Final. Spectators were almost unanimous in saying that they were likely or very likely to attend additional matches. This reflects the strength of the Province in the 2024 championship, with six of Ulster’s nine teams represented in the group stage, including the host county (Monaghan).

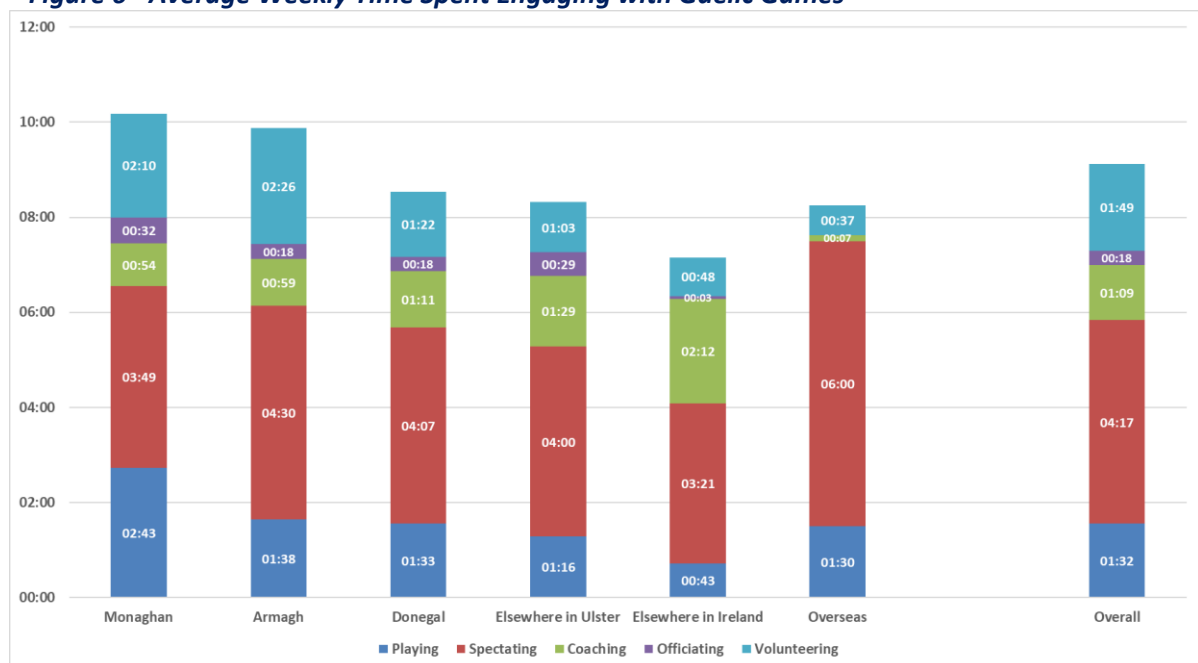
Figure 5 - Likelihood of Attending Matches in All-Ireland Series



Regular Engagement with Gaelic Games

- 5.3 The value of Gaelic Games is not restricted to the economic impact of major games, but also includes the direct benefits of participation and the indirect social benefits which come supporting the clubs and counties in other ways. Figure 6 and Figure 7 show how, albeit in crude terms, regular engagement of players, spectators and others with Gaelic Games. The graphs show how the sum total of activity may be equated to the contribution of time and money to participation, coaching, officiating, volunteering, and spectating.
- 5.4 Spectators at the Ulster Final spend an average of just over 4.25 hours per person per week watching Gaelic Games. This equates to more than 3 full-length games, though there is no distinction in the data between watching in person or on television. Volunteering consumes slightly less than 2 hours, while playing accounts for an average of 90 minutes, and coaching just over an hour per week. The average time spent officiating is 21 minutes, reflecting the fact that only a small proportion of respondents engage as referees or umpires.
- 5.5 The pattern is quite consistent among respondents from Ulster, though there are minor variations between counties. Armagh residents volunteer for nearly 2.5 hours per week for example, which those living elsewhere in Ulster are coaching for almost 90 minutes. It is also of interest to note that spectators from overseas watch Gaelic Games for as much as 6 hours per week but do very little coaching or volunteering by comparison with supporters on the island of Ireland. Nevertheless, it is significant that the overall time commitment per week averages just over 9 hours among the respondents to the spectator survey.

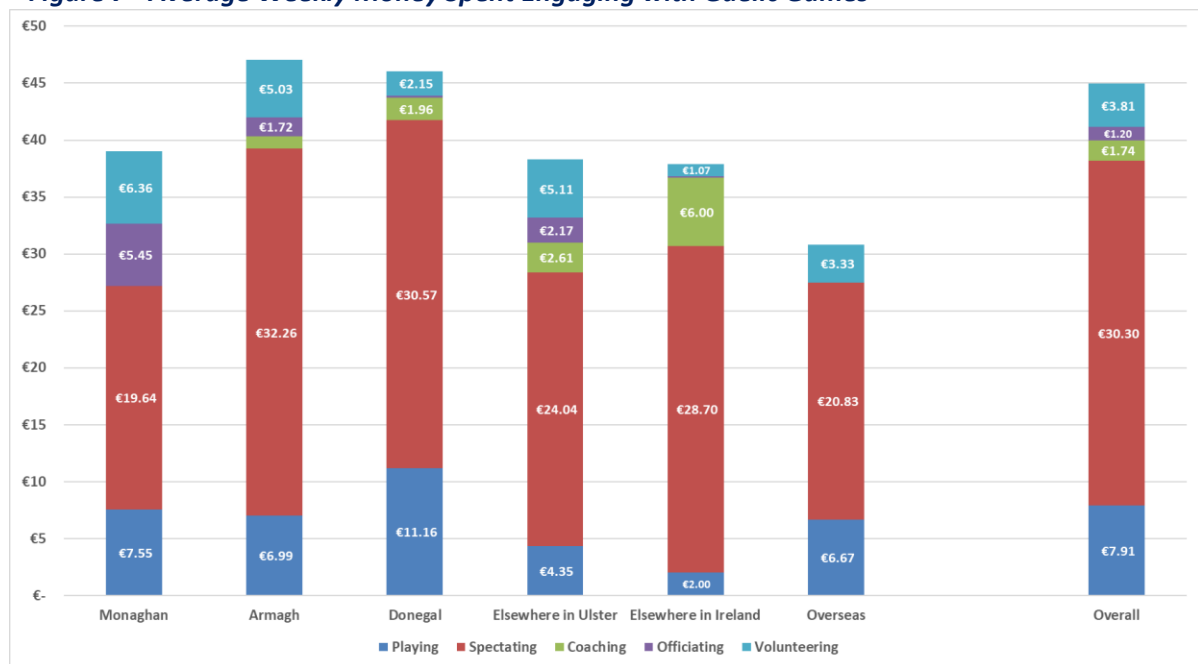
Figure 6 - Average Weekly Time Spent Engaging with Gaelic Games



- 5.6. Financially, the impact of engagement with Gaelic Games among the survey respondents is also notable. Figure 6 shows that playing costs an average of €8.59 per week, while spending on spectating comes to just over €30. Volunteering (€3.81), coaching (€1.74) and officiating (€1.20) generate lower costs on average. Again, figures vary by county with Donegal

supporters spending the most on playing (€11.16), and Armagh fans spending more on spectating (€32.26), but the average financial commitment is considerable at €45 per week.

Figure 7 - Average Weekly Money Spent Engaging with Gaelic Games



5.7 Taken together, these figures show that the supporters attending the Ulster Senior Football Championship Final display considerable levels of dedication to their teams. Typically, supporters attended all three rounds of the Championship, are likely or very likely to have travelled to watch subsequent matches in the All-Ireland Series. Their weekly commitment to a range of Gaelic Games activities amounts to 9 hours of time and €45 in spending, of which 4.25 hours and €30 are allocated to spectating. They might therefore reasonably be considered to be “committed” supporters of Gaelic Games.

6. CONCLUSIONS

Summary of the key findings

6.1 The Ulster Football Senior Championship Final is an annual event which brings a significant influx of visitors to a town of just under 2,000 residents. The results of this research reveal a range of positives that are encouraging for organisers of the occasion planning future events. These are summarised in the bullet points below.

- There was a positive total economic impact on Clones of around €1.5m and around €2.1m for the wider Co. Monaghan economy. This impact was achieved by: visitor and workforce spending; contracts awarded to local businesses; and the spending of contractors in the local area.
- Spectators attending the game spent an average of around €45 in Clones, rising to €52 in the wider Co. Monaghan area. The total direct impact of the event was €1.37m in the town and €1.68m in the county. The direct impact on Clones equates to around €683 for

every resident of the town. The event had a very low proportion of ‘deadweight’ – spectators who were either local or residents or not in the area specifically for the event.

- Spending by volunteers, media and other staff was relatively low by comparison with the spectators. The workforce spent an average of €31 in Clones rising to €49 in the Co. Monaghan area. Most of the workforce travelled to the event on the morning of the game and returned home the same day.
- Businesses in Clones and surrounding areas benefitted from the expenditure of spectators attending the game. More than three quarters of traders in the town expected higher takings compared with a normal Sunday.
- The majority of spectators at the event were attending their third game in the Ulster Football Senior Championship. Almost all supporters (99%) stated that they were likely or very likely to attend further matches in the All-Ireland Series.
- Spectators at the event were committed supporters of Gaelic Games, spending an average of just over 9 hours and €45 per week playing, spectating, coaching, officiating and volunteering in their clubs and counties.

Learning

- 6.2 The Ulster Football Senior Championship Final is one of the highlights of the Irish sporting calendar. It is remarkable that an event of this scale and significance is regularly staged in a rural town with around 2,000 residents. The economic impact of the game should be seen in this context, but it is also important to highlight the loyalty of the spectators who follow their team, as well as the contribution of the many volunteers who support the event. Their dedication is evident from the considerable amount of time and money they commit to Gaelic Games every week.

Simon Shibli
David Barrett
October 2024

APPENDIX A: SPECTATOR QUESTIONNAIRE



ECONOMIC IMPACT RESEARCH

The GAA has commissioned the Sport Industry Research Centre at Sheffield Hallam University, supported by Ulster University, to assess the economic impact of the 2024 Ulster Senior Football Final. We would be grateful if you could spare a few minutes to complete this questionnaire. Please **CROSS** where appropriate or write in the spaces provided. When asked about Monaghan refer to the map on the back of the questionnaire.

- Including today, how many games in the Ulster Senior Football Championship have you attended? games
- Please tell us the name of the town or locality where you live: _____
- What is the first half of your Eircode/postcode? We ask this to understand where you have come from to be at the game today. We do not use this data for any other purpose.
- In a typical week, how much time do you spend on Gaelic Games-related activities?

Playing	Spectating	Coaching	Officiating	Volunteering
<input type="text"/> <input type="text"/> hours	<input type="text"/> <input type="text"/> hours	<input type="text"/> <input type="text"/> hours	<input type="text"/> <input type="text"/> hours	<input type="text"/> <input type="text"/> hours
- In a typical week, how much money (to the nearest €) do you spend on Gaelic Games-related activities?

Playing	Spectating	Coaching	Officiating	Volunteering
€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00
- Is the Ulster Football Championship Final the main reason for you being in Clones today? Yes No
- Are you staying away from home during your visit to the Ulster Football Championship Final? Yes No *(go to q.9)*
- If yes, where are you staying, for how long, at what cost per night (if any) and for how many people?
(Cross all that apply & use map of Clones & Co. Monaghan on the back of the clipboard if required)

	Nights	People	Cost per night (€)	Stay with friends/family
<input type="checkbox"/> Clones	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	<input type="checkbox"/>
<input type="checkbox"/> Elsewhere in Co. Monaghan <i>(Where?) _____</i>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	<input type="checkbox"/>
<input type="checkbox"/> Elsewhere in Ulster <i>(Where?) _____</i>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	<input type="checkbox"/>
- How much on average (to the nearest €), do you expect to spend per day on the following items in the locations stated?
(See the map of Clones & Co. Monaghan on the back of the clipboard if required)

	At the stadium?	Away from the stadium in Clones?	Elsewhere in Co. Monaghan?	Elsewhere in Ireland?
Food & Drink <i>(not in accommodation costs)</i>	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00
Merchandise / Programmes	€ <input type="text"/> <input type="text"/> <input type="text"/> .00			
Shopping / Souvenirs		€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00
Entertainment / Attractions <i>(inc. other GAA games)</i>		€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00
Travel / Transport <i>(including car rental)</i>		€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00
Other <i>(e.g. parking)</i>	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00	€ <input type="text"/> <input type="text"/> <input type="text"/> .00
- Including yourself, how many people does this expenditure cover?
- How likely are you to attend additional matches in the 2024 All-Ireland Senior Football Championship?

<input type="checkbox"/> Very likely	<input type="checkbox"/> Likely	<input type="checkbox"/> Unlikely	<input type="checkbox"/> Very unlikely	<input type="checkbox"/> Don't know
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Go raibh maith agat. Thank you for your help and enjoy the rest of your time at the game today.

Office use only: Arthur McGrane The Hill O'Duffy Eastern Town



APPENDIX B: VOLUNTEERS, MEDIA AND OTHER GROUPS QUESTIONNAIRE



ECONOMIC IMPACT ASSESSMENT (Volunteers Media & Other Groups)

Sheffield Hallam University's Sport Industry Research Centre has been commissioned by the GAA to assess the economic impact of the Ulster Senior Football Championship Final. We would be grateful if you could spare 5 minutes to complete this questionnaire. Please CROSS where required or write in the space provided. When asked about Monaghan refer to the map on the back of the questionnaire.

1. Which of the following best describes your role at Ulster Senior Football Championship Final?

<input type="checkbox"/> Print media	<input type="checkbox"/> Photographer	<input type="checkbox"/> TV/radio	<input type="checkbox"/> New media	<input type="checkbox"/> Event staff
<input type="checkbox"/> Volunteer	<input type="checkbox"/> Sponsor / VIP	<input type="checkbox"/> Contractor	<input type="checkbox"/> Other (please specify...)	_____

2. For which organisation are you working? *For research purposes only & will not be shared* _____

3. For how many days are you in Monaghan (i.e. Clones linked to your trip to the Ulster Senior Football Final?) □ □

4. Where do you live?

<input type="checkbox"/> Monaghan	<input type="checkbox"/> Elsewhere in Ulster	<input type="checkbox"/> Elsewhere in Ireland
<input type="checkbox"/> Overseas (please specify...) _____		

5. Which of the following best describes where you are staying while attending Ulster Final? *(See map on reverse)*

<input type="checkbox"/> At home <i>(Go to q.10)</i>	<input type="checkbox"/> Monaghan	<input type="checkbox"/> Elsewhere in Ulster	<input type="checkbox"/> Outside of Ulster
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6. If you are staying away from home, is this?

<input type="checkbox"/> With Friends / Relatives <i>(Go to q.9)</i>	<input type="checkbox"/> A Hotel / B&B	<input type="checkbox"/> Rented accommodation / Air BnB
<input type="checkbox"/> Other <i>(Please specify)</i> _____		

7. How much (if anything) is your ACCOMMODATION COSTING PER NIGHT? € □ □ □ □

8. And for how many people is your accommodation expenditure? □ □

9. For how many nights are you staying in this accommodation? □ □

10. EXCLUDING ACCOMMODATION (to the nearest €), how much per day do you expect to spend on yourself and others in Monaghan during your visit to the Ulster Final? *(See map)* € □ □ □ □

11. On average (to the nearest €) how much of the expenditure in Q10 has been/will be spent in the following categories? *Only include the expenditure of your own money - do not include money spent on hotels unless extra to room & board.*

Food and drink	€ □ □ □ □	Merchandise/programmes	€ □ □ □ □
Shopping/souvenirs	€ □ □ □ □	Entertainment <i>(including green fees)</i>	€ □ □ □ □
Travel in Monaghan	€ □ □ □ □	Other <i>(e.g. petrol/parking)</i>	€ □ □ □ □

12. EXCLUDING ACCOMMODATION, in TOTAL how much will you have spent in MONAGHAN during your trip to/work at the Ulster Senior Football Championship Final? € □ □ □ □ □ □

13. INCLUDING YOURSELF, on how many people is the expenditure in Q12? □ □

If you LIVE IN MONAGHAN thank you for your help, please return your form to a researcher.
 If you LIVE OUTSIDE MONAGHAN please answer the remaining questions.

14. Will you visit other parts of Ireland on your trip to/work at the Ulster Final? Yes No *(Go to end)*

15. How many additional days are you likely to spend visiting other parts of Ireland? □ □

16. If applicable how much will you spend on accommodation in the rest of Ireland? € □ □ □ □

17. And excluding accommodation how much do you expect to spend in the rest of Ireland (outside MONAGHAN) on your trip to/work at the Ulster Senior Football Championship Final? *(include travel from / spend at airport, ferry or meals if you are eating outside MONAGHAN)* € □ □ □ □ □ □

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Thank you for your help. Please return the form to a researcher.



APPENDIX C: BUSINESS QUESTIONNAIRE



ECONOMIC IMPACT ASSESSMENT - Business Survey

The Sport Industry Research Centre at Sheffield Hallam University, supported by Ulster University, has been commissioned by the GAA to assess the impact of the 2024 Ulster Senior Football Championship Final. We would be grateful if you could spare a few minutes to complete this questionnaire. Please place a CROSS where required or write your answers in the spaces provided. When asked about Monaghan refer to the map on the back of the questionnaire.

1. Where is the business located?

2. What is the full Eircode / postcode?

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3. What is the name of your business?

4. What is the nature of your business?

- Public House/Bar
 Portable Fast Food Stand
 Restaurant
 Cafe / Coffee Shop
 Newsagent
 Grocer/Convenience store
 Other (please specify...) _____

5. Compared to a normal Sunday, and based on your experiences in previous years, how busy are you on the day of the Ulster Senior Football Championship Final?

- Busier than normal
 No difference
 Less busy than normal
 Don't know

6a. From a financial perspective how do your takings compare with those of an average Sunday?

- Greater than normal
 No difference
 Lower than normal
 Don't know

6b. If takings are greater/lower than an average Sunday, approximately how much is the difference in monetary (€) and/or percentage (%) terms?

€

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 or

--	--	--

 %

7a. How many extra staff hours (if any) have you incurred because of the potential increase in business created by the 2024 Ulster Senior Football Championship Final?

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7b. How much have these extra staff hours cost the business?

€

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8. Have you put on any 'Ulster Final Specials' or done anything over and above what you would normally do, in an attempt to attract customers into your establishment? *Please provide details*

9. Taking all things into account, how do you rate the effect of the 2024 Ulster Senior Football Final on your business?

- Positive effect
 No effect
 Negative effect

10. Please provide any other information about the effect of the game on your business. e.g. How does the day of the Ulster Senior Football Final compare to other major days of the year, such as a Bank Holiday, Christmas time or the New Year?

11. If you are unable to answer the questions relating to finance with any great accuracy, would you please provide a name and contact number or email address and we'll be in touch over the next few weeks once the Final is over. Alternatively, we can leave you another survey and a pre-paid envelope.

Name _____ Phone or Email _____

PLEASE HAND THE QUESTIONNAIRE TO A RESEARCHER, OR RETURN IN THE ENVELOPE PROVIDED. THANKS FOR YOUR HELP.

