



THE ECONOMIC AND SOCIAL VALUE OF GAELIC GAMES ON THE ISLAND OF IRELAND: SUMMARY REPORT

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FOREWORD

It has been a pleasure and an honour to work on this project for the GAA and its partners, the Ladies Gaelic Football Association and the Camogie Association. It is unusual to have the academic freedom to pursue a line of enquiry objectively and without external influence. The end result is an original piece of research that quantifies the hard economics of Gaelic Games' financial worth to the economy of Ireland, as well as placing a monetary value on their worth to individuals, wider communities and Irish society.

For most of the research team the field of Gaelic Games was unfamiliar territory and we had a steep learning curve finding out about their scale and cultural significance. If there is a takeaway message for us, it is that these sports are not just games – they are a cornerstone of Irish culture, history, and identity. It has been a privilege to have been granted access to this world.

Thanks are due to Tom Ryan CEO of the GAA and the two Presidents we have worked with, Larry McCarthy and Jarlath Burns, for having the foresight and courage to invest in this research. We have been supported in our endeavours by the GAA, notably Dr Peter Horgan and Cian Murphy, as well as by key staff in the Ladies Gaelic Football Association and the Camogie Association. We would also like to pay tribute to Ulster GAA and Munster GAA in particular for their assistance in enabling the two major event economic impact studies in Clones and Thurles respectively. To the Provinces, Counties and 513 clubs who trusted us with their financial data – thank you – you enabled something which has never been done before. To the individuals who gave us interviews, advice, or filled in surveys, we are hugely grateful.

As the GAA, LGFA and Camogie Association embark on the process of integration, we hope that you have actionable insight that can be used to inform your conversations with Government and other stakeholders. Integration has the potential to achieve more for women's sport in Ireland

than anything else that has happened in recent years. I have every confidence that Gaelic Games will continue to thrive in modern society while preserving the deep-rooted traditions that make them so unique.

Finally to the team at Sheffield Hallam University, Manchester Metropolitan University and Ulster University, thank you for your tireless efforts in delivering this research. It is work about which we can all feel justifiably proud.

Professor Simon Shibli
Sheffield Hallam University
November 2024

Disclaimer

This report is the result of extensive research and analysis conducted in good faith to provide valuable insights into the economic and social value of Gaelic Games. Whilst every effort has been made to ensure the accuracy and reliability of the information presented, it is important to note that the findings reflect the data and perspectives available at the time of writing.

This report is intended for information purposes only and should not be considered as definitive advice or a substitute for professional consultation. Readers are encouraged to consider their specific circumstances and consult relevant experts when using this research.

We welcome feedback and constructive dialogue to continue refining our collective understanding of Gaelic Games.

Citation, to cite this work

Gaelic Athletic Association (2024) The economic and social value of Gaelic Games on the island of Ireland, GAA, Dublin, Ireland. (Research conducted by Sheffield Hallam University, Manchester Metropolitan University and Ulster University).

EXECUTIVE SUMMARY

This report provides an overview of a programme of work commissioned by the Gaelic Athletic Association (GAA) to examine the economic and social value of Gaelic Games. The research has three components: a Satellite Account for Gaelic Games; a Social Value and Social Return on Investment analysis of Gaelic Games; and the economic impact of two major Gaelic Games events.

It is good business sense and good governance for sport and cultural organisations to know the value of their property rights to support their dealings with external stakeholders. The significance of this research increased whilst it was being conducted following the proposed integration of the Gaelic Athletic Association, the Ladies Gaelic Football Association and the Camogie Association in 2027.

The methods employed are consistent with internationally recognised best practice. The Satellite Account uses the EU approved Vilnius Definition of the sport industry and extracts its values from the System of National Accounts. Social Return on Investment is an internationally recognised and widely used method for measuring social value. The two economic impact studies are compliant with www.eventimpacts.com devised for UK Sport and its partners.

The Satellite Account for Gaelic Games reveals that:

- Consumer spending on Gaelic Games is €377m, which equates to 7.8% of the sport industry;
- Gross Value Added attributable to Gaelic Games is €710 million (8.7% of the sport industry);
- Employment generated by Gaelic Games is 10,600 FTE (9.8% of the sport industry);
- Total economic activity attributable to Gaelic Games is €1,619 million (10.2% of the sport industry);
- Government receives €192.6 million in direct and indirect taxation from Gaelic Games.

In the context of the entire economy of Ireland, Gaelic Games is a measurable proportion at 0.24% of consumer spending; 0.13% of Gross Value Added; and 0.31% of employment.

The Social Value and Social Return on Investment research found that the total value of inputs to produce Gaelic Games was €1.244 billion, which produced outcomes valued at €31.06 million for Health, €556.48 million for Subjective Wellbeing, €1,223.94 billion for Social Capital, and €1,056.19 billion for the replacement cost of volunteering. The Social Return on Investment multiple of inputs to outcomes is 2.30:1. Using different sensitivity analysis assumptions, indicates that this ratio could range from 2.30:1 to 3.96:1.

The economic impact of the Ulster Football Senior Championship Final at St Tiernach's Park, was attended by 28,996 spectators, who generated a total economic impact of €1.5m on the town of Clones and a €2.1m impact on County Monaghan. The Munster Hurling Senior Championship Final at Semple Stadium was attended by 45,148 spectators who generated €3.2m for Thurles and €4.5m for County Tipperary. Research with businesses in and around Clones and Thurles confirmed that these inter county finals are positive for local businesses and are valued by the local communities. For Clones with a population of around 2,000 the Ulster Final led to an injection of €683 per resident.

The GAA and partners now have comprehensive economic and social value data that can be used to: inform conversations with stakeholders; support the integration of Gaelic Games in 2027; enable advocacy; and to establish baselines from which future growth can be measured.

CONSUMER SPENDING

on Gaelic Games is

€377m

which equates to

7.8%

of the sport industry*.

GROSS VALUE ADDED* ATTRIBUTABLE TO

Gaelic Games is

€710m

8.7%

of the sport industry.

*Consumer spending
Consumer spending is the total money spent on final goods and services in an economy by individuals and households for personal use and enjoyment.

*Gross Value Added (GVA)
Gross Value Added measures the contribution to the economy of each individual producer, industry or sector in a country, in this case the Gaelic Games industry. It is a close approximation for the more familiar term Gross Domestic Product, which is the total monetary value of the output produced by an economy.

EMPLOYMENT GENERATED

by Gaelic Games is



10,600 FTE*

9.8%

of the sport industry.

*Full Time Equivalent (FTE)
A Full Time Equivalent (FTE) is a measurement that computes the number of full time posts employed in an industry. If an employer considers 40 hours to be a full working week, then one employee working 40 hours per week would have an FTE of 1.0. By contrast, two part employees working 20 hours per week would each have an FTE of 0.5, indicating that their hours worked are equivalent to half of a full-time employee. Taken together, the two part time employees would contribute 1.0 FTE

TOTAL ECONOMIC ACTIVITY ATTRIBUTABLE TO

Gaelic Games is

€1.62b

10.2%

of the sport industry.



GOVERNMENT
RECEIVES

€192.6m

IN DIRECT
AND INDIRECT
TAXATION FROM
GAELIC GAMES

IN THE CONTEXT OF THE ENTIRE ECONOMY
OF IRELAND,
GAELIC GAMES

IS A MEASURABLE PROPORTION AT

0.24%

of consumer spending;

0.13%

of Gross Value Added; and

0.31%

of employment.

The **Social Return on Investment** research found that the total value of inputs to produce **Gaelic Games** was

€1.244b

which produced outcomes valued at

€31.06m

for **Health**, this outcome measures improved physical and mental health associated with regular participation in Gaelic Games.

€556.48m

for **Subjective Wellbeing**,

this outcome measures life satisfaction and is derived from national surveys such as the Irish Sports Monitor.

€1.224b

for **Social Capital**, this outcome represents the value of social networks, trust and reciprocity and is derived from national surveys such as the Irish Sports Monitor.

...and
€1.056b
for the
replacement
cost of
volunteering.

The **Social Return on Investment** multiple of outcomes to inputs is

2.30:1

(2.867b:1.244b = 2.30:1)

Using different sensitivity analysis assumptions, indicates that this ratio could range from

2.60:1

to **3.96:1**

For every €1 invested into Gaelic Games activity, the value returned to individuals, wider communities and society is at least €2.30

The economic impact of the
**ULSTER FOOTBALL
SENIOR
CHAMPIONSHIP FINAL**

at **St Tiernach's Park**, was attended by

28,996 spectators,
who generated a total economic impact of

€1.5m

on the town of **Clones** and a

€2.1m

impact on county **Monaghan**.

The
**MUNSTER HURLING
SENIOR CHAMPIONSHIP
FINAL**

at **Semple Stadium** was attended by

45,148 spectators
who generated

€3.2m

for **Thurles** and

€4.5m

for county **Tipperary**.

1. INTRODUCTION

1.1 The project

This report provides an overview of a programme of work commissioned by the Gaelic Athletic Association (GAA) to examine the economic and social value of Gaelic Games on the island of Ireland. Although funded by the GAA, the research focuses on Gaelic Games in the fullest sense and includes the activities of the Ladies Gaelic Football Association (LGFA) and the Camogie Association (CA). Following a competitive tendering process in July 2023, the research was awarded to a consortium comprising: the Sport Industry Research Centre (SIRC) at Sheffield Hallam University; Institute of Sport (IoS) at Manchester Metropolitan University; and the School of Sport and Exercise Sciences (SSES) at Ulster University. The research was conducted over a 13 month period and is summarised in this overview report.

The full programme of work and the underlying substantive reports are outlined in the bullet points below.

1. A Satellite Account for Gaelic Games, which quantifies the economic value of Gaelic Games in terms of consumer spending; Gross Value Added; employment; turnover; and taxation.
2. The Social Value of Gaelic Games, which places a monetary value on known social outcomes such as health benefits; subjective wellbeing; social capital; and volunteering. The research is developed further into a Social Return on Investment (SROI) analysis by computing a ratio of outcomes to inputs to derive a SROI multiple. The headline Social Value and SROI report is underpinned by a technical appendix detailing the assumptions and calculations used to derive the headline figures.
3. The Economic Impact of Major Gaelic Games Events, which quantifies the economic impact of the Ulster Football Senior Final on the town of Clones and Co. Monaghan; and the economic impact of the Munster Hurling Senior Final on the town of Thurles and Co. Tipperary.

1.2 The rationale

An obvious question to ask about the programme of research is why would the GAA and its partners want to commission it? Our response is that there are numerous internal and external uses for data of this type.

1. Data is a source of strategic advantage for many organisations today, enabling leaders to plan, make decisions, and control their businesses. In the case of Gaelic Games, knowing the value of your 'property rights' enables more meaningful and productive relationships with bodies such as Government and its agencies, Sport Ireland, Sport NI, Local Sports Partnerships, local authorities, commercial partners and other stakeholders.
2. The economic value of the sport industry is understated in the System of National Accounts used in developed nations to measure the scale of their industries. Sport is not recognised as an industry in its own right within the System of National Accounts and its true significance is diluted across other industries such as hospitality, clothing and footwear, manufacturing, construction and so on. A recent UK study showed that the traditional view of the sport sector revealed Gross Value Added (GVA) of £10.7 b. Applying the EU's Sport Satellite Account methodology subsequently revealed the true value of the sport sector to be £83.1b in GVA. It follows that if the sport sector is undervalued in the System of National Accounts, then so will the economic value of Gaelic Games. Consequently, a Satellite Account for Gaelic Games enables a more realistic estimate of the sector's economic importance to be shown.
3. Whilst sport and physical activity are widely assumed to be 'good' for individuals and society, there has been little evidence to quantify the assumption. The use of Social Value calculations addresses this issue by deriving a monetary value for non-market outcomes such as health and enhanced wellbeing. Social Value is an emerging

area of research in sport and physical activity and it helps to show the totality of a sport's worth.

Recent research in England shows that the social value of sport and physical activity was £107.2 b in 2022/23, which is more than the £83.1b in GVA generated by the entire UK sport industry discussed above. By comparing the Social Value of sports with the inputs employed to achieve them, it is possible to derive a Social Return on Investment multiple.

1.3. Report structure

The remainder of the report is structured as follows:

- Section 2 outlines the methods;
- Section 3 provides an outline of the policy context;
- Section 4 details the scale of Gaelic Games from the perspectives of clubs, players and finances;
- Section 5 summarises the key findings of the standalone Satellite Account for Gaelic Games report;
- Section 6 summarises the key findings of the standalone Social Value and Social Return on Investment report;
- Section 7 summarises the key findings of the two standalone event economic impact reports;
- Section 8 concludes the report.

2. THE METHODS

2.1. Gaelic Games Satellite Account

To understand the economic impact of sport, it is essential to begin with a clear definition of sport and physical activity as forms of economic activity. It is important to recognise that this economic dimension extends beyond just the direct costs of participating in sports - such as purchasing athletic clothing and footwear. It also encompasses ancillary activities such as sports journalism, sports betting, video gaming, and e-sports.

The definition of sport in economic terms uses the 'Vilnius Definition', which is a European Union accepted framework for analysing the sport industry. The long established Vilnius Definition 2.0 is in the process of revision into Vilnius 3.0. As the team involved in this research is also involved with revising the Vilnius Definition, it has been employed in this instance to measure the economic importance of Gaelic Games.

The forthcoming update to the Vilnius Definition (Version 3.0) distinguishes between "characteristic goods" of sport and "connected goods" to align with Eurostat's requirements for Satellite Accounts. According to the European System of Accounts (ESA) handbook, the revised Vilnius Definition will now be compatible with methodologies used in Tourism Satellite Accounts and Environmental Satellite Accounts. This study is the first time that the Vilnius Definition 3.0 of sport has been used on the island of Ireland. The research presented in this report uses the nine key sources listed below as its basic inputs.

1. Examination of the commercial sector through the annual financial statements of sport-related businesses filed with Companies Registration Office and Companies House (examined through the Financial Analysis Made Easy (FAME) database).
2. Analysis of over 500 clubs' finances through annual financial statements.
3. The trade of goods as reported by the Central Statistics Office (CSO).
4. Annual financial statements for governing

bodies (GAA, LGFA, CA), Provinces, Counties, associations and charities.

5. Household Budget surveys.
6. The Input-Output Tables for the national economies, together with average earnings data provided by the Annual Survey of Hours and Earnings and CSO.
7. Previous research on Gaelic Games and the sport industry such as the Irish Sports Monitor.
8. The Prodocom dataset which can identify the manufacturing (or not) of several sport related items.
9. The recently published Sport Satellite Account for the United Kingdom.

In summary, the current methodology provides an evaluation of the Gaelic Games industry in terms of consumer spending, GVA and employment using an approach that meets the quality thresholds of government statistics. Perhaps most importantly, the approach is transparent and can be reconciled with the National Accounts from which they are drawn.

Evidence of where this technique has been used previously: -

Department for Digital, Culture, Media and Sport (2024) Sport Satellite Account for the UK, DCMS, London, UK. (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University).

The R&A (2023) A Satellite Account for Golf in the UK, The R&A, St Andrews, Scotland, UK (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University).

Confederation of Golf in Ireland (2017) A Satellite Account for Golf in the Republic of Ireland, CGI, Maynooth, County Kildare, Ireland. (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University).

2.2 Social Value / Social Return on Investment

The most comprehensive and rigorous method to evaluate the societal impact of Gaelic Games is to carry out a Social Return on Investment (SROI) study. SROI is an outcome-based framework that measures change in ways that are relevant to the people or organisations which experience or create it. SROI tells the story of how change is being created for stakeholders by measuring outcomes and using monetary values to represent them.

An SROI study expresses the value attached to various social outcomes in relation to the costs associated with providing the infrastructure and opportunities for sport and physical activity. This approach enables a ratio of benefits to costs to be calculated. For example, a ratio of 3:1 means that for every €1 invested in sport and physical activity a return of €3 is created for individuals and society. Our approach to monetising outcomes has been based on the six-stage SROI model outlined in Figure 2.1.



Figure 2.1: Stages of a Social Return on Investment study

Table 2.1 provides a summary of the methods and key activities for each stage of the Social Value and Social Return on Investment research.

Table 2.1 Summary of approach and methods

Stage	Key activities
Stage 1	Identify key stakeholders in consultation with GAA, CA and LGFA. If necessary, consult wider stakeholder group. Refine scope of SROI with GAA, CA and LGFA and key stakeholders.
Stage 2	Scoping literature review to identify, summarise and synthesise work on Gaelic games participation and social outcomes, inc. cultural outcomes. Key stakeholder interviews to identify what changes / outcomes. Establish theory of change and Value Map, summarising the literature review and interviews.
Stage 3	Identify inputs (desk review / secondary data collection). Physical and mental health valuation (secondary data collection and analysis of prevalence data, health cost data). Wellbeing Valuation Analysis for Subjective Wellbeing and Social Capital values (secondary data analysis of the Irish Sports Monitor). Identify and value other outcomes (e.g., individual development; social and community development)
Stage 4	Develop SROI model using the data collected in Stage 2 & 3.
Stage 5	Sensitivity analysis testing a range of assumptions underpinning the model
Stage 6	Verify findings with key stakeholders including GAA, CA and LGFA. Presentation of results. Reporting

Our Social Return on Investment modelling is fully transparent and open to scrutiny. Our research includes only those outcomes that can be evidenced by robust evidence. Furthermore, only those outcomes for which there is an appropriate financial proxy are monetised; and others particularly those specific to Gaelic Games are simply reported qualitatively. Our goal in this endeavour is to provide high quality data that enable the GAA and partners to have confidence in using the SROI study to support wider policy and investment discussions.

Evidence of where this technique has been used previously.

Sport Wales (2023) The Social Return on Investment of Sport in Wales, Sport Wales, Cardiff, UK. (Research conducted by Sheffield Hallam University and Loughborough University)

The R&A (2023) The Social Value of Golf in the UK, The R&A, St Andrews, Scotland, UK. (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University)

Sport New Zealand (2022) Social Return on Investment (SROI) of Recreational Physical Activity in Aotearoa New Zealand, Sport NZ, Wellington, New Zealand. (Research conducted by Sheffield Hallam University (United Kingdom) and the Agribusiness and Economics Research Unit (AERU) at Lincoln University (New Zealand) acting in partnership with Ihi Research and 4 Global.

2.3 Economic impact of major sports events

The calculation of economic impact at the Ulster Football Senior Championship Final and the Munster Hurling Senior Championship Final was in accordance with the economic strand of www.eventIMPACTS.com - the event evaluation framework developed by the Sport Industry Research Centre for UK Sport and its national and regional partners. The eventIMPACTS methodology is widely recognised internationally as a 'gold standard' 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 that would not have occurred in the absence of the events", in this case the Ulster Football Senior Championship Final and the Munster Hurling Senior Championship Final. For both events we looked at hyper local level, Clones and Thurles; as well as at county level for County Monaghan and County Tipperary.

In addition to looking at the 'demand' side of the economic impact, that is, how much additional spending was brought to the host economies; we also conducted 'supply' side audits with local businesses in the host economies and along the so-called 'pilgrimage routes'.

Evidence of where this technique has been used previously.

The R&A (2024) The economic impact of the 152nd Open Golf Championship (Royal Troon), The R&A, St Andrews, Scotland. (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University).

PGA European Tour (2024) The economic impact of the 2023 Ryder Cup, European Tour Group, Wentworth, Surrey, UK. (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University).

The R&A (2019) The economic impact of the 148th Open Golf Championship (Royal Portrush), The R&A, St Andrews, Scotland. (Research conducted by the Sport Industry Research Centre, Sheffield Hallam University).

3. POLICY CONTEXT

3.1. The GAA and its partners

The Gaelic Athletic Association is explicitly more than the global governing body of a sport, as indicated by the extract in the table below from the Aims and Ethos stated in the GAA Official Guide Part 1.

1.2 Basic Aim

The Association has as its basic aim the strengthening of the National Identity in a 32-County Ireland through the preservation and promotion of Gaelic Games and pastimes. It is the International Governing Body responsible for the promotion of Gaelic Games and the Aims and Ethos of the Association.

1.3 National Games

The Association shall promote and control the National games of Hurling, Gaelic Football, Handball and Rounders, and such other games, as may be sanctioned and approved by Annual Congress.

1.4 Additional Aims

- (a) The Association shall actively support the Irish language, traditional Irish dancing, music, song, and other aspects of Irish culture. It shall foster an awareness and love of the national ideals in the people of Ireland, and assist in promoting a community spirit through its clubs.
- (b) The Association shall promote its aims amongst communities abroad through its International Units and World GAA.
- (c) The Association shall support the promotion of Camogie and Ladies Gaelic Football.
- (d) The Association shall use all practical endeavours to support Irish Industry especially in relation to the provision of trophies and playing gear and equipment.

What differentiates the GAA, LGFA, and CA from other governing bodies and federations is their focus on national identity, culture, and community spirit in addition to sport. Furthermore, their commitment to supporting Irish industry is also an unusual feature for a sporting body.

For the purposes of this project, clause 1.4 (c) is particularly important – supporting the promotion of Camogie and Ladies Gaelic Football. This broad notion of support for other codes of Gaelic Games has evolved into a formal strategy to integrate existing governing bodies into one unified body as articulated in Aontas 2026 – Towards one GAA for all.

During the course of this project, it was announced on 20th February 2024 that the GAA, Ladies Gaelic Football Association and the Camogie Association planned to integrate into one body for Gaelic Games in 2027. Clearly, quantifying the economic and social value of Gaelic Games could not be timelier as the three bodies work together internally and externally to bring about successful integration.

Beyond its Basic Aim the GAA also adopts various other positions on its ethos. The Association is strictly amateur and we expect to see this reflected in relatively low levels of direct employment (e.g. permitted employees of Units) and relatively high levels of volunteering.

The Association is non-party political, anti-sectarian, anti-racist and committed to the principles of inclusion and diversity at all levels. It is also committed to safeguarding and promoting the interests and wellbeing of children and young people (under 18) who are involved in its games and related activities. Gaelic Games can be said to be underpinned by the principles of good governance in a holistic sense and therefore an attractive partner for external partners in sport and beyond.

3.2. Sport Ireland

Sport Ireland is the lead body for recreational and high performance sport in Ireland. Its current strategy from 2022-2027 is consistent with the ethos behind Gaelic Games and there are numerous strategic synergies, which should encourage collaborative working in general and in the lead up to the integration of the GAA, LGFA and CA specifically.

Aim

“An active nation where people are encouraged to start, continue to participate, progress and achieve in sport.”

Selected strategic outcomes

1. Building and strengthening the “participation/recreational sport” element of the sports development framework.
2. Building and strengthening of the “committed/organised sport” element of the sports development framework.
3. Volunteer development – To invest in supporting the sport sector to improve the volunteer experience. Support the building of a more diverse volunteer base.

19. Promote the value of sport, including benefits of active and social participation.

26. Deliver Women in Sport Policy to ensure fair and equitable practices and gender balance in sport.

Beyond the obvious synergies of more participation (1 and 2) and more volunteers (3), it is worth highlighting the two other objectives. First, promoting the value of sport both active and social, which speaks to the agenda of sport’s contribution to wider society such as social connectedness and social capital. Secondly, the Women in Sport policy is an ideal opportunity for the Ladies Gaelic Football Association and the Camogie Association to work in partnership with Sport Ireland to support the development that will be needed to make integration a success in 2027.

3.3. Sport Northern Ireland

Under the leadership of the Department for Communities, Sport Northern Ireland’s policy Active Living: More people, more often, more of the time is committed to achieving:

‘Lifelong involvement in sport and physical activity will deliver an active, healthy, resilient and inclusive society which recognises and values both participation and excellence.’

Again, this position is consistent with the aims of the GAA and partners and creates both the logic and the opportunity and for ongoing strategic collaboration between the parties.

3.4. Government and government agencies

To achieve strategic outcomes at scale there is a clear incentive for sports bodies to work collaboratively with governments and their departments. This point is perhaps best illustrated by the GAA working in partnership with the Health Service Executive (HSE) and the National Office for Suicide Prevention (NOSP) to deliver the Healthy Clubs initiative. Around 450 GAA clubs have enrolled on the programme to date since its launch in 2013. Taking a placed-based approach, Healthy Clubs aims to support GAA clubs and communities to achieve locally defined health and wellbeing goals that also reflect the national policy agenda for sport, physical activity, mental health, and preventative health.

Opportunities for further collaboration with government exist around the promotion of the Irish language, culture, children and young people, facility development, other aspects of public health, heritage, rural development and tourism as these are all consistent with the aims and ethos of the GAA and partners as outlined in 3.1 above.

3.5. Concluding comments on policy context

The Gaelic Athletic Association is an unusual governing body in the sense that its stated remit goes beyond the scope of administrating sports and stretches out into a broader range of social and cultural objectives. The Association is also at a critical stage of its development as it contemplates integration with the Ladies Gaelic Football Association and the Camogie Association. As it embarks on its ambitions to become an integrated body and reflects on its current activities, it is timely to evaluate the economic and social impacts of Gaelic Games. Robust data on these measures will support the Association and its partners in their wider conversations with external stakeholders between now and 2027.



4. THE SCALE OF GAELIC GAMES

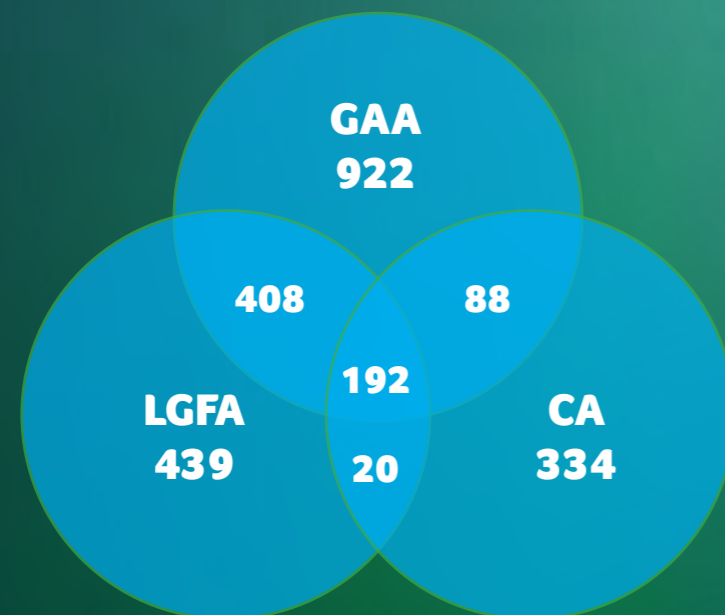
To put the results of the economic and social value estimates into perspective, it is first worth examining the scale of Gaelic Games through the lenses of clubs and financial resources.

4.1. Clubs and participants

The GAA's records indicate that there are a total of 3,303 club sections devoted to Gaelic Games on the island of Ireland across the sports governed by the GAA, LGFA and CA. Some clubs are standalone sport-

specific clubs, such as the 922 GAA clubs shown in the top circle of Figure 4.1. Others by contrast contain various permutations of integration, such as 192 clubs which contain GAA, LGFA and CA clubs. In total, there are 2,403 different clubs, of which 1,695 are standalone clubs and 1,608 clubs which are One Clubs, in that they participate in codes organised by more than one of the three governing bodies. There is already a natural trend towards integration as 49% of clubs already contain a code from more than one of the three governing bodies.

Figure 4.1 The number of Gaelic Games clubs on the island of Ireland



The integration of clubs makes financial sense to benefit from economies of scale such as shared facilities and joint management. There is also a social rationale in bringing clubs together around an agenda of increased social integration via more like-minded people engaging in sport as well as promoting the Irish language and culture.

The total number of members registered in clubs is 850,947 and comprises of 550,186 (65%) GAA; 182,682 (21%) LGFA; and 118,080 (14%) Camogie Association. Membership is made up of children and adults; some members will be international members and others will be non-playing members such as social members, volunteers, committee members,

coaches and so on. The nature of Gaelic Games is such that it is possible for individuals to be members of more than one Association. The GAA's in house analysis of the data indicates that the 850,947 memberships represent around 700,000 individual members. If the 700,000 members were all on the island of Ireland, they would equate to 10% of the 7m population. The significance of this measure of scale is that we use different measures of participation for different measures of economic and social value. For example, our measure for consumer spending is based on adults who participated at least once in the last 12 months, which is 7.0% in the Republic of Ireland and 3.0% in Northern Ireland, giving an all-Ireland composite of 6.6%.

For social value, we are interested in two key subsets of people involved in Gaelic Games, namely participants and volunteers. For participants our focus is on adults who are considered to be either 'highly active' or 'fairly active' such that they derive health benefits and other positive social outcomes that are predicated on specific levels of engagement and the physical intensity of that engagement. For volunteers, we are interested in those people who contribute their time willingly and freely (other than expenses) to enable the production of Gaelic Games and associated activities. The specific measures tend to be taken from national surveys such as the Irish Sports Monitor and the Continuous Household Survey. For each component of the research, our data sources and underpinning assumptions are stated clearly.

4.2. Financial scale

4.2.1. National, regional and county level governance

Analysis of 75 sets of financial statements of the GAA, LGFA and the CA at national, provincial, and county level reveals that the administration of Gaelic Games was a €272 m business in 2022 as shown by the total income for each Association in that year. More than 50% of the total is attributable to the GAA's operations on an all-Ireland and global basis and 93% is attributable to the GAA's activities at national, provincial and county levels. The GAA's Units at national, provincial and county levels had a combined income of more than €0.25b in 2022.

Table 4.1 Total income of the three governing bodies at national, provincial and county levels

Level	Number	GAA	LGFA	CA	Totals	%
National	1	€138,772,173	€7,279,074	€2,899,915	€148,951,162	54.7%
Provincial	4	€29,910,985	€1,455,332	€412,207	€31,778,524	11.7%
Counties	32	€85,370,927	€6,195,772	n/a	€91,566,699	33.6%
Totals	37	€254,054,085	€14,930,178	€3,312,122	€272,296,385	100.0%
Share (%)		93%	6%	1%	100%	

To put these figures into perspective, in 2022 the turnover of Sport Ireland was €150.7m; the Irish Rugby Football Union was €115.5m; and the Football Association of Ireland was €54m. In much the same way that women's golf has thrived since the merger of The R&A and the Ladies Golf Association in 2016, so too the LGFA and CA have much to gain by aligning themselves with the financial scale of the GAA.

Of particular note at national level is that the GAA employs 152 people and has a payroll that equates to around 6% of its total income, which in turn reinforces the significance of the contribution made by volunteers. There are very few businesses which can claim to generate €913k per employee. At a smaller scale the LGFA spends around 12% of its income on payroll costs, which again reinforces the importance of volunteers and their fundraising efforts.

Around 25% of the GAA's income at all levels is generated by gate receipts (c. €62m), which highlights the importance of passive consumption as well as the participation side of Gaelic Games. For the LGFA, the corresponding statistic is around 15%. Our experience of the Ulster Football Senior Final and the Munster Hurling Senior Final is that the cost of watching Gaelic Games of high sporting significance is relatively modest compared with professional sports such as football, rugby and golf.

Although turnover is an important indicator of scale, it is also important to consider financial sustainability as indicated by the bottom line, or whether income exceeds expenditure. Across the GAA Units at national, provincial and county levels, a surplus of €21m was made, equating to 8.7% of turnover. For the LGFA, recorded surpluses were 12% of turnover and for the Camogie Association at national level a surplus of 10% was made.

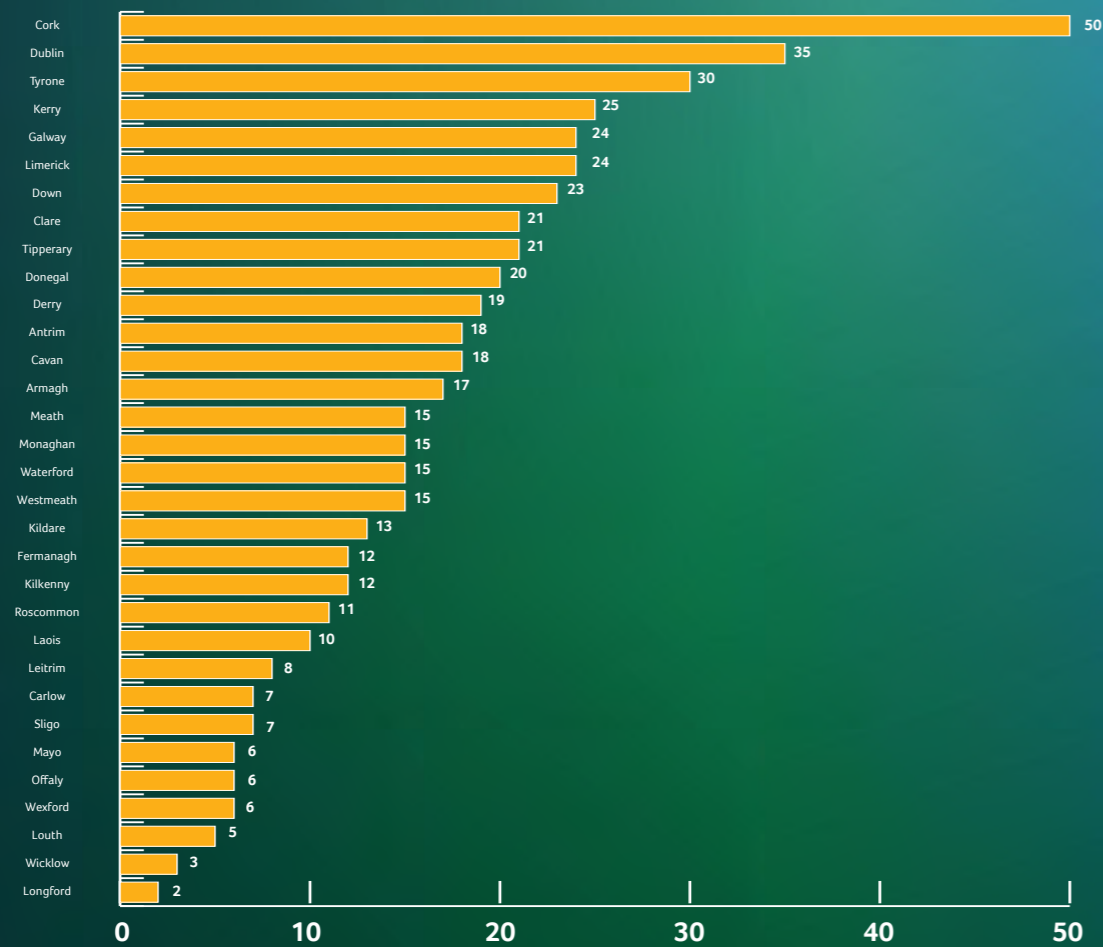
These are healthy returns and would compare favourably with most commercial organisations. There being no shareholders and Gaelic Games being amateur, surpluses made in one year are retained to fund future development activities.

4.2.2 Clubs

A major strength of this research is that we were provided with access to 513 sets of annual accounts from GAA clubs. Some of these clubs are standalone, whilst others will be various combinations of GAA

clubs integrated with either, or both of, Ladies Gaelic Football clubs and Camogie clubs. To be pragmatic and to err on the side of caution, we have taken the 513 sets of accounts provided to be representative of the 1,608 clubs that have a GAA section and these in turn to be representative in financial terms of the 2,403 Gaelic Games clubs and the 3,303 club sections (standalone and variously integrated). The distribution of sets of accounts returned by county is shown in descending order in Figure 4.2.

Figure 4.2 The number of sets of accounts returned by county



The median number of accounts returned by county was 15, with the extremes being 50 from Cork and 2 from Longford, with all 32 counties represented. To gain a sense of the financial scale of clubs, Table 4.2

displays the breakdown of club turnover by Province in terms of the lowest turnover, turnover at the 25th percentile, median and average turnover, turnover at the 75th percentile and highest turnover.

Table 4.2 Total income of the 513 clubs in our sample overall and by province

Measure	Connacht	Leinster	Munster	Ulster	All-Ireland
Number	56	129	156	172	513
Lowest	€28,527	€15,869	€4,875	€22,288	€4,875
25th percentile	€72,745	€93,457	€75,436	€108,490	€84,347
Median	€97,710	€165,790	€120,808	€162,215	€138,312
Average	€133,812	€248,635	€171,760	€187,093	€191,015
75th percentile	€160,059	€350,870	€185,623	€255,370	€238,183
Highest	€464,208	€1,285,547	€1,343,571	€532,170	€1,343,571

Arguably the best measure for turnover is the median score i.e. the 50th percentile in a distribution, because it smooths out the effect of extreme scores. In all cases the average score is significantly greater than the median, which implies that larger clubs are having a disproportionate effect on raising the average. If we adopt the median across the 513 clubs of €138,312 and aggregate up to 1,608 clubs, then the turnover of Gaelic Games clubs is estimated at €222 m. Taken with the €272 m for the national, provincial and county level administration of Gaelic Games, we can see a sector that has a turnover of almost €0.5b (€494m).

Like the governance levels, clubs tend to make a surplus of income over expenditure. In the 2022 accounts this amounted to €10.2m or 4.6% of total club income. This margin may appear relatively slim, but many clubs report their finances on a cash accounting basis rather than an accruals basis. The net effect of this approach is that any capital expenditure incurred in year is shown in total in the year in which it was incurred and is not spread out over its useful life by accounting for depreciation.

An interesting feature of many GAA clubs is that they enjoy wider community support via the organisation of club lotteries. In our sample of 513 club accounts, 400 (78%) derived income from a lottery which typically accounts for €26,234 or 21% of turnover. By contrast, all 513 clubs derive income from membership but the median income from this source is €14,003, or just over half of what is derived from lottery sources. The income derived from lottery sources is a useful indicator of the goodwill and financial support that Gaelic Games clubs have from both members and the community more generally.

As part of our work on the two major events, we repeatedly came across signs advertising club Lotto draws. The finding that these Lotto fundraisers are open to non-club members and are promoted to the wider community is a practical indication of how Gaelic Games clubs are more than just providers of opportunities to play Gaelic Games.



The amateur ethos of GAA clubs is reflected in the near absence of payroll costs. There is some evidence of cleaners, caretakers and bar staff being employed by clubs as well as payments to physiotherapists, medics, strength and conditioning coaches and sport psychologists on a self-employed basis. However, the totality of these expenses is little more than 4% of club income as revealed in club accounts.

5. A SATELLITE ACCOUNT FOR GAELIC GAMES

4.3. Concluding comments on scale

Gaelic Games can be seen to be a significant industry in its own right. With membership of clubs in the widest sense being as much as 10% of the population, Gaelic Games is a significant social movement for players, coaches, volunteers and social members. In financial terms the turnover of governing bodies and Units at provincial, county and club level drives an industry with a turnover of c. €0.5b. The industry is sustainable because of the contributions made by volunteers and wider public support for live events and local club-organised lotteries. Until now the economic significance of Gaelic Games has been unquantified. However even on the basis of the limited financial analysis presented above, it is our view that there will be some surprise when the full scale of Gaelic Games is revealed later in this report.

5.1. Overview

The contribution of Gaelic Games to the economy is assessed through the creation of a 'Satellite Account.' This technique, developed by the United Nations, is designed to measure the economic size of sectors not classified as distinct industries in National Accounts. Many EU countries have already implemented Tourism Satellite Accounts, and several including the UK¹ have established a Sport Satellite Account (SSA). This current research on Gaelic Games marks the second application of this methodology to a specific sport in Ireland, following the Satellite Account for golf published in 2017². Satellite Accounts analyse industries from multiple perspectives, providing a comprehensive view of their economic impact as outlined in the following bullet points.

- Consumer spending, which is defined as the spending of individuals and households on goods and services related to Gaelic Games.
- Gross Value Added (GVA), the building blocks of the National Accounts, is defined as the profits

plus wages within an industry, less an adjustment for taxation and subsidies.

- Employment, which is reported as number of jobs in the economy.
- Turnover, which reflects the revenue flows associated with a specific level of Gross Value Added (GVA).
- Taxation, which examines revenue or cost of Gaelic Games to the public purse.

In addition to these high-level measures of economic importance, the results are contextualised by comparing the results with the sport industry in Ireland as well as the Irish economy as a whole.

5.2. Consumer spending

Consumer spending on Gaelic Games in Ireland was found to be €377m as shown in Table 5.1 which is equivalent to €54 per head of population, or €65 per adult in Ireland. This is distributed between €345m in the Republic of Ireland and €28m in Northern Ireland.

Table 5.1 Summary of Consumption, 2022, island of Ireland

Expenditure Type	Spending RI (€m)	Spending NI (€m)	Total (€m)	Percentage
Live Events	57	5	63	17%
Education	52	2	54	14%
Sport equipment	43	2	46	12%
Sport goods in general stores	32	1	33	9%
Food, drinks, and catering	31	2	34	9%
Clothing & Footwear	28	5	33	9%
Accommodation / Travel	23	1	24	6%
Members' Fees	17	4	21	6%
Betting	9	1	10	3%
Other	53	5	59	16%
Total	345	28	377	100%

Admissions to live events represent the largest category of consumer spending on Gaelic Games, totalling €63 m, which accounts for 17% of the overall spending. This figure is driven by the immense popularity of Gaelic Games and the substantial membership base within sports clubs, which itself contributes, in terms of membership fees, €21m, or 6% of total Gaelic Games-related expenditure in Ireland. Additionally, household spending on education is notably high at €54m, largely due to the significant amount of time children spend in schools participating in Gaelic Games. While government-funded education is not included in consumer spending, both the Input-Output Table and Consumer Surveys indicate a considerable level of expenditure on fees and coaching.

Participation in Gaelic Games serves as a catalyst for economic activity in various sectors, as participants increase their spending on sports equipment,

clothing, and footwear. Specifically, spending in the sports equipment market amounts to €46m, while expenditure on clothing and footwear reaches €33m, corresponding to 12% and 9% of total consumer spending on Gaelic Games, respectively. Beyond promoting individual physical and mental health benefits, there are compelling arguments for the broader economic advantages of the sport. These economic benefits are maximised by attracting new participants and enhancing integration with other economic activities. Consumer spending on Gaelic Games has a relatively high share of all expenditure on sport in Ireland. As shown in Table 5.2, Gaelic Games accounts for 7.8% of the €4.8b¹ spent by consumers on sport in Ireland.

Overall, Gaelic Games generates consumer spending equivalent to 0.24% of the total spending in the island of Ireland.

Table 5.2: Gaelic Sport Consumption - In Context, 2022

	Republic of Ireland	Northern Ireland	Total (€m)
Gaelic Games Consumption	€345m	€28m	€377m
Sport Consumption (based on Rol 2018 data and the latest UK SSA)	€3,869m	€813m	€4,820m
Gaelic Games as a percentage of Sport Consumption	8.9%	3.4%	7.8%
Gaelic Games as a percentage of Total Consumption	0.28%	0.11%	0.24%

5.3. Gross Value Added (GVA)

In 2022, the Gross Value Added (GVA) of the Gaelic Games industry on the island of Ireland reached €710m, with the largest contribution coming from the education sector, as well as activities surrounding sports clubs, facilities, and other sporting activities classified as 'Characteristic goods' of the industry. This was divided into €660m for the Republic of Ireland and €43m for Northern Ireland.

Education alone generated €225m in GVA, accounting for 32% of the total GVA associated with Gaelic Games (all-Ireland). The construction sector contributed €68m (9%), while services linked to digital communication, information technology, insurance, and legal activities – generated €62 m (9%). Additionally, activities related to sports clubs,

Table 5.3: Summary of GVA

Sector	GVA Rol (€m)	GVA NI (€m)	Total (€m)*	Percentage
Education	211.7	11.2	224.8	32%
Services (Digital, Information, Insurance, Legal)	61.9	0.4	62.4	9%
Construction	59.0	7.3	67.5	9%
Magazines / Books / Newspapers / TV	45.6	2.2	48.1	7%
Manufacturing	36.3	0.7	37.1	5%
Sport Equipment / Sportswear	35.8	4.8	41.4	5%
Medical Activities	25.9	1.1	27.2	4%
Operation of Sports Facilities	25.9	2.8	29.2	4%
Other Sport Activities	25.6	1.5	27.4	4%
Management and Administration	25.0	2.4	27.8	4%
Accommodation / Tourism	18.7	1.6	20.6	3%
Wholesale	13.6	1.3	15.2	2%
Food, Drinks and Catering	12.8	1.6	14.7	2%
Betting	12.2	1.3	13.8	2%
Activities of Sport Clubs	3.7	0.5	4.4	1%
Other	46.4	2.1	48.9	7%
Total	660	42.9	710	100%

*The Total column is calculated in Euro after converting Sterling values to Euro using the average 2022 exchange rate of €1 = £1.17.

Table 5.4 contextualises the Gross Value Added generated by Gaelic Games, revealing that the two primary sectors of characteristic goods, sport services and education, account for 40% of the total GVA. The construction industry plays a crucial role in direct economic effects, suggesting that Gaelic Games benefit from high multipliers when interacting with other sectors. If participation in Gaelic Games can be increased, which is a highly feasible proposition, given the investment in education, the resulting economic benefits could be substantial, both directly through Gaelic Games and indirectly through positive impacts on sectors with high GVA multipliers, such as construction. We note from our analysis of club accounts that many of them invest heavily in their facilities with expenditure on club houses, gyms, walking tracks, floodlights and artificial grass pitches. Table 5.4 also offers a high-level estimate of the Gross Value Added generated by the sports economy in the island of Ireland, derived from historical data and GVA growth trends. It is estimated that the GVA generated by Gaelic Games accounts for

approximately 8.7% of the total GVA produced by the sport industry and 0.13% of the overall GVA in Ireland. This is divided into 0.14% for the Republic of Ireland and almost 0.1% for Northern Ireland. The shares of the contribution made by Gaelic Games into the sport economy are 9.8% and 3.5% for the Republic of Ireland and Northern Ireland respectively.

Table 5.4: Gaelic Games GVA - In Context

	Republic of Ireland	Northern Ireland	Total
Gaelic Games GVA	€ 660m	€43m	€ 710m
Gaelic Games Characteristic GVA	40%	37%	40%
Gaelic Games Connected GVA	60%	63%	60%
Sport GVA (2022, SIRC estimate based on GVA growth)	€ 6,748m	€1,216m	€ 8,171m
Gaelic Games GVA as a percentage of Sport GVA	9.8%	3.5%	8.7%
Gaelic GVA as a percentage of Total GVA	0.14%	0.08%	0.13%

5.4. Employment

Data from the Labour Force Survey and Eurostat were utilised to estimate employment across various economic sectors. As illustrated in Table 5.5, the Gaelic Games industry supports approximately 10,600 jobs. This is divided into 9,500 jobs in the Republic of Ireland and 1,100 in Northern Ireland. Gaelic Games is amateur, and we are not implying that these jobs are within Gaelic Games. What we mean is that the economic activity generated by Gaelic Games creates employment in associated industries.

Table 5.5: Summary of Gaelic Games Employment

Sector	Employment RoI ('000s)	Employment NI ('000s)	Employment Total ('000s)	Percentage
Education	4.0	0.4	4.4	41%
Construction	0.9	0.1	1.0	9%
Other Sport Activities	0.7	0.1	0.8	8%
Operation of sport facilities	0.5	0.1	0.6	6%
Sport Equipment / Sportswear	0.4	0.1	0.5	5%
Accommodation / Tourism	0.5	0.0	0.5	5%
Food, drinks and catering	0.2	0.1	0.3	3%
Management and Administration	0.3	0.0	0.3	3%
Services (Digital, Information, Insurance, Legal)	0.2	0.0	0.2	2%
Betting	0.2	0.0	0.2	2%
Manufacturing	0.2	0.0	0.2	2%
Medical activities	0.2	0.0	0.2	2%
Activities of Sport Clubs	0.1	0.0	0.1	1%
Wholesale	0.1	0.0	0.1	1%
Magazines / Books / Newspapers / TV	0.1	0.0	0.1	1%
Other	0.9	0.1	1.0	9%
Total	9.5	1.1	10.6	100%

Construction continues to be a vital sector, generating 1,000 jobs, which corresponds to 9% of the Gaelic Games economy. This contribution, much like Gross Value Added, is expected to enhance the employment multiplier effect within the industry. Additionally, notable employment levels are found in the sports equipment and sportswear sectors (500 jobs), as well as in accommodation and tourism (500 jobs).

To provide context for Gaelic Games employment, it is beneficial to examine the relationship between Gross Value Added and employment, as presented in Table 5.6. This analysis allows us to assess the significance of employment generated within the broader sport economy. According to estimates based on previous reports and employment trends, employment related to Gaelic Games accounts for 9.8% of the total sport economy and approximately 0.31% of overall employment in Ireland.

Table 5.6: Gaelic Games Employment - In Context

	Republic of Ireland	Northern Ireland	Total
Gaelic Games employment	9,500	1,100	10,600
Gaelic Games characteristic employment	56%	53%	56%
Gaelic Games connected employment	44%	47%	44%
Sport Employment (2022, SIRC estimate based on employment growth)	82,330	26,400	108,700
Gaelic Games employment as a percentage of sport employment	11.5%	4.2%	9.8%
Gaelic Games employment as a percentage of total employment	0.36%	0.14%	0.31%

5.5. Turnover

Turnover, or total economic activity, shows the total value of production or sales generated by the sport industry, encompassing ticket sales, merchandise,

Approximately 56% of employment in Gaelic Games is generated within the characteristic services of education and sports services, highlighting the significance of the active sector in the industry. This emphasises the critical role that participation and engagement play in driving economic activity and job creation within Gaelic Games.

broadcasting rights, sponsorships, and other revenue streams specific to sport as shown in Table 5.7. Gaelic Games generate €1,619m of output, divided into the Republic of Ireland (€1,523m) and Northern Ireland (€96 m).

Table 5.7: Gaelic Games Turnover

Sector	Turnover RoI (€m)	Turnover NI (€m)	Turnover Total (€m)	Percentage
Construction	241.8	26.4	272.6	17%
Education	239.8	8.9	250.2	15%
Services (Digital, Information, Insurance, Legal)	218.7	9.4	229.7	14%
Magazines / Books / Newspapers / TV	146.8	4.1	151.6	9%
Manufacturing	119.6	6.9	127.7	8%
Sport Equipment / Sportswear	76.5	3.8	81.0	5%
Wholesale	53.2	2.5	56.2	3%
Accommodation / Tourism	49.2	2.6	52.2	3%
Medical Activities	47.1	2.2	49.7	3%
Other Sport Activities	45.0	3.0	48.5	3%
Operation of Sports Facilities	45.4	2.4	48.2	3%
Management and Administration	36.7	2.2	39.3	2%
Betting	21.4	1.0	22.6	1%
Food, Drinks and Catering	21.0	1.2	22.4	1%
Other	160.8	6.6	167.4	10%
Total	1,522.9	96.3	1619.2	100%

In terms of turnover, the construction industry exhibits the greatest direct effect of a single CPA code, generating €273m, followed closely by education at €250m and sports activities (CPA 93.1) at €108m. Other than these sizable sections, the total effect is distributed among many economic activities as illustrated in Table 5.7.

Table 5.8 places these results into a wider context. The characteristic goods are associated with 21% of the turnover generated, whilst the remaining

79% is associated with connected goods. This balance is reasonable as the connected goods require raw materials and capital, which are not necessary in many aspects of education and sport services. Further, Gaelic Games are associated with 10.2% of the sport economy output in Ireland, divided into 11.6% for the Republic of Ireland, and 4.2% for Northern Ireland. The overall share for the contribution of Gaelic Games in the economy in Ireland is 0.15%, divided into 0.16% in the Republic of Ireland and 0.10% in Northern Ireland.

Table 5.8: Gaelic Games, Turnover-in Context

	Republic of Ireland	Northern Ireland	Total
Gaelic Games turnover	€1,523m	€96m	€1,619m
Gaelic Games characteristic turnover	22%	15%	21%
Gaelic Games connected turnover	78%	85%	79%
Sport turnover (2022, SIRC estimate based on turnover growth)	€13,163m	€2,310m	€15,866m
Gaelic Games turnover as a percentage of sport turnover	11.6%	4.2%	10.2%
Gaelic Games turnover as a percentage of total turnover	0.16%	0.10%	0.15%

5.6. Taxation

The economic activity associated with Gaelic Games generates positive outcomes for government earnings in the form of tax receipts. According to the Satellite Account model, taxation from income tax, corporation tax, and Value Added Tax collectively contributes approximately €192.6m annually to the Central Government, as shown in Table 5.9.

This finding underscores the financial significance of Gaelic Games not only in promoting sport but also in supporting public finances. In comparison, the total value of grants allocated to Gaelic Games through the Sports Capital Programme was €64 m. This point indicates that the direct economic impact of Gaelic Games generates sufficient income for the Government to cover the entire capital grant by a factor of 3.

Table 5.9: Central Government Earnings from the Gaelic Games Industry

	Public Sector Income Rol (€m)	Public Sector Income NI (€m)	Public Sector Income NI (€m)
Tax on consumption (VAT)	46.7	2.3	49.4
Tax on incomes	112.8	7.1	121.1
Tax on corporation profits	20.6	1.3	22.1
Total	180.1	10.7	192.6

5.7. The sporting and wider economic context

Table 5.10 presents key statistics that illustrate the relationship between the Gaelic Games industry and both the Irish sport economy and the broader economy. These statistics are essential for understanding the economic impact and significance of Gaelic Games within the overall landscape of sport in Ireland.

Table 5.10: The Gaelic Games Economy in Context

Measure	Gaelic Games (2022)		Sport (2022)		Gaelic Games as % of the sport economy		Gaelic Games as a % of the Irish sport economy	Gaelic Games as % of the entire Irish economy
	Rol	NI	Rol	NI	Rol	NI		
Consumer Spending	€345m	€28m	€3,869m	€813m	8.9%	3.4%	7.8%	0.24%
GVA	€660m	€43m	€6,748m	€1,216m	9.8%	3.5%	8.7%	0.13%
Employment	9,500	1,100	82,330	26,400	11.5%	4.2%	9.8%	0.31%

The analysis in Table 5.10 indicates that Gaelic Games play a highly significant role in the sport industry, accounting for 7.8% of sport related consumer spending, 8.7% of sport related Gross Value Added (GVA), and 9.8% of sport employment. The consumer

spending figure is particularly noteworthy as it highlights the connection between participation in Gaelic Games and high-value economic activities such as club membership, equipment purchases, clothing, and tourism-related activities.

5.8. Satellite Account conclusions

The Satellite Account for Gaelic Games confirms the scale of the sector in terms of consumer spending, Gross Value Added, employment, turnover and taxation. As absolute figures these measures may seem somewhat abstract. However, by contextualising them against the sport industry as a whole, it can be seen that Gaelic Games is a highly significant component of the sport industry in Ireland, representing 7.8% of consumer spending, 8.7% of Gross Value Added and 9.8% of employment. When looking at the economy of Ireland as a whole, the revelation that Gaelic Games is actually measurable at all, is a strong positive finding.

The Satellite Account for Gaelic Games establishes a replicable baseline for the industry, which can be reassessed in the future and used as a benchmark for measuring the ongoing development of Gaelic Games. By providing detailed insights into employment, Gross Value Added (GVA), and contributions to public revenue, the account serves as a valuable tool for policymakers and stakeholders to gauge the economic impact of Gaelic Games over time. Such assessments can inform strategies aimed at enhancing participation and investment in the sector.

6. SOCIAL VALUE / SOCIAL RETURN ON INVESTMENT

6.1. Overview

The calculation of Social Value and Social Return on Investment (SROI) requires the derivation of the inputs, the outputs and the outcomes associated with Gaelic Games. Inputs are the financial resources that people and organisations invest in Gaelic Games and the value of volunteer time that is contributed to the ‘production’ process. As a direct consequence of the inputs, there are two key outputs, namely participation and volunteering in Gaelic Games. The outputs in turn lead to outcomes, such as participants deriving health benefits and volunteers enhancing their social capital. It is possible to place a monetary valuation on some of the outcomes, for example the number of cases of a health condition prevented multiplied by the known cost of that treatment. The total value of outcomes can be compared with the value of the inputs to derive a Social Return on Investment multiple. As our analysis will explain later in this section, our estimate for inputs is €1.244 b and the valuation of the outcomes achieved from these inputs is €2.868b. Comparing the ratio of inputs to outputs results in a Social Return on Investment multiple of 2.3:1, which means that for every €1 invested in Gaelic Games there is at national level a social value benefit of €2.3.

6.2. Inputs

A summary of the material financial and non-financial inputs by key stakeholders identified for Gaelic Games at an all-Ireland level in 2022 is presented in Table 6.1, which were derived using different sources.

- Household spending relating to Gaelic Games was identified from the Gaelic Games Satellite Account report.
- The expenditure associated with clubs was estimated by analysing the financial data for more than 500 GAA clubs and extrapolating to the total number of GAA clubs across the 32 counties in Ireland.
- The activities of the Gaelic Athletic Association (GAA), the Ladies Gaelic Football Association (LGFA) and the Camogie Association (CA) are also recognised in the inputs, which were identified from their annual reports.
- A material non-financial stakeholder input relates to volunteer time, which is valued based on the number of regular volunteers who support Gaelic Games, the average number of hours that they contribute annually, and the average hourly wage.

As per the data presented in Table 6.1, the total value of the financial (€0.4b) and non-financial (€0.84m) inputs included in the SROI calculation for Gaelic Games is €1.24b.

Table 6.1: Summary of Inputs

Stakeholder	€m
Households	204.59
GAA Clubs	137.66
GAA / LGFA / CA	62.07
Volunteers	840.00
Total Value of Inputs	1,244.33

6.3. Outputs

Two types of outputs for Gaelic Games are considered in this research: (1) active participation in Gaelic Games and (2) volunteering done to support Gaelic Games. Event attendance and any other forms of interaction with Gaelic Games are excluded in this iteration of the SROI model due to the absence of robust evidence about the outcomes associated with these outputs and data to value them.

Data for the participation and volunteering related outputs were sourced or estimated from relevant national surveys of the adult population in the Republic of Ireland (Irish Sports Monitor – ISM) and Northern Ireland (Continuous Household Survey – CHS). The key data for outputs used in the valuation of outcomes for each jurisdiction are presented below.

Republic of Ireland

ISM classified 37% of the adult population as being ‘highly active’ in 2022, meaning that some 1.5 m adults met the National Physical Activity Guidelines (NPAG). The term ‘highly active’ refers to adults who have participated in at least 30 minutes of physical activity at least five times in the last seven days through a combination of sport participation and recreational walking (i.e. 150+ minutes per week). Based on ISM data, we estimate that a further 26% of adults (1.1m) met the definition of being ‘fairly active’ i.e. participated in 30 minutes of physical activity at least twice during the previous seven days.

The 2022 edition of the ISM reports an adult weekly participation rate in Gaelic Football of around 2%, which is a broadly comparable statistic to the 2019 and 2021 ISM editions. Using ISM data, we estimate that 3.2% of adults participate in Gaelic Games on a regular basis, equivalent to 0.13m people.

ISM shows an overall regular volunteering rate of 9% for 2022 as a whole (0.37m adults), with 4% of the adult population playing a regular voluntary role in Gaelic Games (0.16m people), through either football, hurling or camogie. Most volunteers (82%) volunteered for just one sport, and, on average, volunteers invested 4.5 hours per week into the sport that they volunteered.

Northern Ireland

According to the CHS, in 2022/23 48% of adults had participated in sport at least once within the previous year (excluding walking) and 40% had participated over the last four weeks. The annual participation rate for Gaelic Games among adults was 3%. Using this data, we estimate that 2.4% of adults (36,000 people) participated in Gaelic Games on a regular (weekly) basis. The number of regular Gaelic Games volunteers is estimated to be around 45,000.

6.4 Outcomes

SROI is an outcomes-based measurement framework. Four outcome areas were included in this study for which robust evidence and data are available to monetise.

1. Improved physical and mental health (for adult participants) associated with regular participation in Gaelic Games.
2. Improved subjective wellbeing (for adult participants and volunteers) associated with regular engagement with Gaelic Games.
3. Enhanced social capital (for adult participants and volunteers) associated with regular engagement with Gaelic Games.
4. The replacement value of the time contributed by regular volunteers to support Gaelic Games.

These outcome areas and the approach used to value them are discussed in turn below.

Health

A recent Sport Ireland commissioned report found that sport and physical activity has a measurable positive impact on the physical and mental health of adults in the Republic of Ireland who achieve the National Physical Activity Guidelines (NPAG) of 150+ minutes per week. The net value of the direct (healthcare) and wider savings achieved through the prevention of nine non-communicable diseases (NCDs) and chronic health conditions was estimated at €0.4b in 2019. On a per participant basis, the average health value per ‘highly active’ adult was around €300 in 2019 prices, which equates to €333 when expressed in 2022 prices. This inflation-adjusted figure for the Republic of Ireland is highly consistent with the average value for adults who

achieved a similar threshold of physical activity in England in 2022 (£294 or €344) according to a Sport England study.

The Sport England study also valued the health-related direct and indirect savings associated with 'fairly active' adults (doing 30-149 minutes of physical activity per week), which was worth £215 (€251) per person in 2022. Given the proximity of the average health values for adults doing 150+ minutes of physical activity per week in the Republic of Ireland and England (€333 v €344), it is reasonable to estimate the average health value for fairly active adults in the Republic of Ireland using the corresponding data from England. Using this approach, the average health value for 'fairly active' adults in the Republic of Ireland is estimated at €244.

Multiplying the average health values for 'highly active' and 'fairly active' adults (€333 and €244 respectively) by the corresponding number of adults in these categories (1.5m and 1.1m respectively) gives a population-level health valuation for the Republic of Ireland of €0.76b. Participation in Gaelic

Games contributes to this aggregate figure and will therefore be a subset of the overall health value associated with sport and physical activity. Using the regular participation rate for adults in Gaelic Games of 3.2% as a proxy, we estimate that the health value in the Republic of Ireland attributable to Gaelic Games is €24.32m. Dividing this estimate by the number of adults who participate in Gaelic Games regularly (130,285) gives an average value of €187 per participant.

For Northern Ireland, there is no comparable data available for the 'highly active' and 'fairly active' thresholds; for this reason, we multiply the average value of €187 per participant by the estimated number of adults taking part in Gaelic Games on a regular basis (36,126). Using this approach, we arrive at an estimated health value of €6.74m (£5.76m) for this jurisdiction. Bringing together the estimates for the Republic of Ireland (€24.32m) and Northern Ireland (€6.74m), the cumulative health value of Gaelic Games across the island of Ireland in 2022 is €31.06m – see Table 6.2.

Table 6.2: Health Valuation Summary

Stakeholder	Jurisdiction	Impact (m)	
		Quantity	Value
Regular participants (Adults 16+)	Republic of Ireland	130,285	€187
	Northern Ireland	36,126	€187
			(€160)
			€31.06

Quantity = number of people experiencing the outcome (participants).

Value = How important is the outcome on average to each affected stakeholder (expressed in monetary terms).

Impact = quantity x value.

Subjective wellbeing

To estimate the value of improved subjective wellbeing associated with regular participation in Gaelic Games, we first multiplied the number of 'highly active' and 'fairly active' adults in the Republic of Ireland by the average wellbeing value derived for each activity threshold – €4,191 and €2,295 per participant respectively. These average values represent the amount of income required to bring subjective wellbeing (measured using life satisfaction) up to the level it would be ordinarily if participation in sport and physical activity was excluded.

Using this approach, and accounting for the regular participation rate among adults in Gaelic Games in the Republic of Ireland (3.2%), we arrive at a population-level subjective wellbeing estimate of €0.28b attributable to Gaelic Games, which equates to an average value per participant of €2,146. If we multiply this average value by the number of regular Gaelic Games participants in Northern Ireland, then the corresponding population-level estimate for this jurisdiction is €77.54m (£66.28m). Collectively, the subjective wellbeing estimates for Gaelic Games participation in 2022 amount to €0.36b across the island of Ireland.

For volunteering, we multiplied the number of regular Gaelic Games volunteers in the Republic of Ireland by an average value of €1,170 to arrive at a gross subjective wellbeing estimate of €0.19m. This figure was then discounted by 18% to account for volunteering in multiple sports as per the evidence from ISM 2022. Therefore, the revised estimate for subjective wellbeing associated with volunteering to support Gaelic Games in the Republic of Ireland is €0.16b (i.e. €959 per regular volunteer). Using the same set of assumptions, the corresponding estimate for Northern Ireland in 2022 is €43.26m (£36.98m). The cumulative subjective wellbeing estimate for regular volunteering to support Gaelic Games at an all-Ireland level is €0.20b.

The valuation of the subjective wellbeing estimates for participation and volunteering were controlled for each type of engagement, i.e. there is no overlap between them and the two estimates can be added together. Table 6.3 shows the aggregated subjective wellbeing estimates, which are valued collectively at €0.56b.

Table 6.3: Subjective Wellbeing Valuation Summary

Stakeholder	Jurisdiction	Impact (m)	
		Quantity	Value
Regular participants (Adults 16+)	Republic of Ireland	130,285	€2,146
	Northern Ireland	36,126	€2,146
			(€1,835)
			€279.65
Regular participants (Adults 16+)	Republic of Ireland	162,656	€959
	Northern Ireland	45,103	€959
			(€820)
			€43.26
			(€36.98)
			€556.48

Social capital

Our analysis of ISM data revealed a significant positive effect of being 'highly active' on 'trust', which is a commonly used measure of social capital. The average value per participant for 'highly active' adults was €4,201. Using this data together with the regular participation rate among adults in Gaelic Games (3.2%), we estimate the value of enhanced social capital attributable to Gaelic Games in the Republic of Ireland to be €0.20b, which equates to an average value per participant of €1,554. This average value serves as a proxy for Northern Ireland, for which the corresponding population-level estimate is €56.15m (€47.99m). The social capital estimates for Gaelic Games participation in 2022 across the island of Ireland amount to €0.26b.

As with participation, the effect of regular volunteering on 'trust' is also positive and significant. The social capital estimates associated with regular volunteering to support Gaelic Games at an all-Ireland level is €0.97b, of which €0.76b occurs in the Republic of Ireland and €0.21b (€0.18b) in Northern Ireland. As with subjective wellbeing, there is no overlap between the social capital estimates for participation and volunteering, which means they can be combined. Table 6.4 presents the aggregated social capital estimates for the island of Ireland, which are valued collectively at €1.22b.

Table 6.4: Social Capital Valuation Summary

Stakeholder	Jurisdiction	Impact (m)	
		Quantity	Value
Regular participants (Adults 16+)	Republic of Ireland	130,285	€1,554
	Northern Ireland	36,126	€1,554
			(€1,328)
			(€47.99)
Regular participants (Adults 16+)	Republic of Ireland	162,656	€4,646
	Northern Ireland	45,103	€4,646
		(€3,971)	(€820)
			(€179.11)
			€1,223.94

Replacement value of volunteering

In addition to being a non-financial input that supports the activities of Gaelic Games, the time contributed by volunteers represents a non-market benefit (value) for the organisations that utilise them. We use the replacement cost of volunteers

as a financial proxy to represent this value, which is calculated using average annual volunteer hours multiplied by average hourly earnings in the Republic of Ireland and Northern Ireland. The total value associated with this outcome for the island of Ireland is estimated at €1.06b, as shown in Table 6.5.

Table 6.5: Replacement Value Summary

Stakeholder	Jurisdiction	Impact (m)	
		Quantity	Value
Clubs	Republic of Ireland	162,656	€5,319
	Northern Ireland	45,103	€4,235
			(€3,620)
			(€163.27)
			€1,056.19

Summary of outcomes

The total social value of Gaelic Games across the island of Ireland is estimated at €2.87b. As per the breakdown shown in Table 6.6, the outcomes linked to volunteering (replacement value, social capital and subjective wellbeing) account for 77% of this overall

value (€2.22b) and participation outcomes (subjective wellbeing, social capital and health) account for 23% (€0.65b). This distribution is reflective of the nature of Gaelic Games and recognises its reliance on voluntary labour.

Table 6.6: Summary of Outcomes

Outcome	Impact (m)		% of Impact	
	Republic of Ireland	Northern Ireland		
		Total		
Health (participants)	€24.32	€6.74	€31.06	1%
			(€5.76)	
Subjective Wellbeing	435.67	120.81	€556.48	19%
			(€103.25)	
Participation	€279.65	€77.99	€357.20	12%
			(€66.28)	
Volunteering	€156.02	€43.26	€199.28	7%
			(€36.98)	
Social Capital	€958.24	€265.71	€1,223.94	43%
			(€227.10)	
Participation	€202.50	€56.15	€258.65	9%
			(€179.11)	
Volunteering	€755.74	€209.56	€965.30	34%
			(€179.11)	
Replacement Value (volunteers)	€865.16	€191.03	€1,056.19	37%
			(€163.27)	
OVERALL	€2,283.39	€584.29	€2,867.68	100%
			(€499.39)	

The measurement and valuation of outcomes pertaining to children and young people from their involvement in Gaelic Games remains a significant omission due to a lack of robust evidence and data. Similarly, social outcomes associated with other forms of engagement (e.g. spectating) are not sufficiently

evidenced and they are therefore not valued. For these reasons, it is our view that the monetised value of Gaelic Games across the island of Ireland presented in this study is a conservative estimate that can be regarded as an 'at least' value.

6.5 Calculating the Social Return on Investment

Table 6.7 summarises the main constituents of the SROI calculation for the island of Ireland, which shows total inputs for Gaelic Games are estimated to be €1.24b and the total value of the monetised social outcomes is estimated at €2.87b. The difference between the value of the outcomes and the inputs gives a positive Net Present Value of €1.62b.

Table 6.7: SROI Calculation

	€m	Data Source
Total Value of Inputs	1,244.33	Table 6.1
Outcome – Health	31.06	Table 6.2
Outcome – Subjective Wellbeing	556.48	Table 6.3
Outcome – Social Capital	1,223.94	Table 6.4
Outcome – Replacement Value	1,056.19	Table 6.5
Total Value of Outcomes	2,867.68	Sum of Tables 6.2 – 6.5
Net Present Value	1,623.34	Outcomes minus Inputs
Social Return on Investment	2.30	Outcomes divided by Inputs

The SROI is 2.30 – this means that every €1 invested in Gaelic Games creates €2.30 in social value. While this is an encouraging finding, it is a conservative valuation for two reasons. First, not all social outcomes and potential beneficiaries have been included in the social value estimate. Second, the treatment of voluntary labour as both an input and an outcome in the SROI calculation means that the social return ratio is somewhat constrained. To illustrate the point, we present in Section 6.6 some sensitivity analysis of the SROI ratio.

6.6 Sensitivity analysis

The purpose of conducting a sensitivity analysis is to test the assumptions that have the greatest impact on the social value and SROI estimates. It also allows us to test the influence of using different financial proxies to value outcomes. We have considered two scenarios.

First, we replaced the subjective wellbeing measure of life satisfaction with a composite measure (consisting of four wellbeing indicators – life satisfaction, happiness, worthwhileness and anxiety) to derive

alternative financial proxies for participation and volunteering using ISM data. Under this scenario, the all-Ireland social value estimate increased from €2.87b to €3.24b and the social return ratio increased marginally from 2.30 to 2.60. In other words, the effect of using the alternative subjective wellbeing measure is relatively modest and it also confirms that the assumptions we have used in the SROI calculation are cautious.

Second, using data from the ISM we considered an additional measure of social capital – ‘networks’ (based on the number of clubs of which a person is a member) – which had a significant association with both participation and volunteering. The ‘networks’ measure was not included in our SROI calculation because there was some conceptual ambiguity about its relationship (and potential overlap) with the more recognised measure of social capital used in our analysis (i.e. trust). Hypothetically, if the respective values of ‘trust’ and ‘networks’ are considered additive, then the overall social value estimate for the island of Ireland increases to €4.55b and the SROI increases to 3.66.

If we combine both the scenarios presented above, then the social value and SROI increase even further to €4.92b and 3.96 respectively. In our view, further investigation is required to understand the legitimacy of adding up values for different social capital measures and therefore our SROI calculation is based on a single measure which is more commonly associated with social capital. This decision is in keeping with the ethos of SROI.

6.7 Other outcomes

Many of the social outcomes articulated by participants, volunteers and sports professionals involved personally and professionally in Gaelic Games suggest that the societal contribution extends far beyond the outcomes that were monetised. The contribution of Gaelic Games to Irish identity, manifested through clubs’ support of Irish culture and language are particularly important. Furthermore, the role of Gaelic Games in fostering social and intergenerational connections, a sense of belonging, and community cohesion among different groups in society were all highlighted as noteworthy.

In keeping with other SROI studies of sport and physical activity, some outcomes identified in the literature and by stakeholders have been acknowledged, but they were not able to be included in the monetary valuation because of a lack of robust evidence linking Gaelic Games with social outcomes and a lack of empirical data on the outcomes identified.

These points support our view that the Social Value we have identified is a prudent estimate and could have been higher had it been possible to establish monetary values for them. However, it is also the case in studies of this type that the qualitative stories are equally as valid as the quantitative numbers and therefore form an important part of the overall narrative.

6.8 Social Value and Social Return on Investment conclusions

The purpose of a Social Return on Investment analysis is not solely to prove the value of an activity. Rather, it is to understand what changes and to use this knowledge to optimise the value created from activities. We recommend the SROI model is reviewed and updated on a periodic basis, to integrate new and improved evidence on the social impact of Gaelic Games as it emerges.

We recommend that the SROI participation and volunteering data is updated bi-annually, or when new participation and volunteering data becomes available. Furthermore, we recommend a refresh of the entire SROI model every five years, to incorporate new outcome evidence and financial proxy data.

Such an approach would build a longitudinal understanding of the contribution of Gaelic Games to the changes people experience in their lives, as well as evidence to inform the GAA’s management approach to making improvements to activities, initiatives and services in the future.

7. THE ECONOMIC IMPACT OF TWO MAJOR GAELIC GAMES EVENTS

7.1. Overview

The third strand of the research programme was concerned with the economic impact of major Gaelic Games events. We were invited to conduct www.eventimpacts.com compliant economic impact studies at the 2024 editions of the Ulster Football Senior Championship final and the Munster Hurling Senior Championship final. There are detailed separate reports for each event, so in this overview we take a high-level view across the two events.

For each event, the research sought to measure economic impact at two levels of geography, namely the town (Clones, Thurles) and the county (Monaghan, Tipperary). The volume of research conducted at each event is shown in Table 7.1 and confirms that surveys were conducted with spectators, members of the workforce and local businesses. In addition, we were provided with some detail on the event budget to identify how much of the income derived was spent locally.

Table 7.1: Research conducted at each event

Method	Clones / Co. Monaghan	Thurles / Co. Tipperary
Spectators' surveys	608	1,072
Workforce surveys	80	86
Business surveys	99	89
Event budget analysis	✓	✓

Economic impact is concerned with new money entering an economy that can be attributed to a specific event. This process excludes local people and people whose main reason for being in the area is not

the event in question, for example people who are on holiday and chance upon an event. What is included in the economic impact estimate at town level and county level is shown in Figure 7.1.

Figure 7.1: Expenditure by Geography

Origin of Expenditure	Destination of expenditure (host economy)	Town	County
		Town	✓
County		X	✓
Province		X	X
Elsewhere		X	X

For Ulster Football, the event attracted 28,995 spectators of whom almost all were from outside Clones (97.8%) and Co. Monaghan (96.5%). For the Munster Hurling event, there was a significantly larger crowd of 45,148 but the proportions who were from outside Thurles (97.9%) and Co. Tipperary (96.3%) were very similar to those found in Clones

and Co. Monaghan. The first key point of note then is that both events led to high number of visitors who descended on Clones and Thurles respectively. This finding is all the more remarkable given the populations of each town (Clones c. 2,000, Thurles c. 8,000).

7.2. Economic impact in practice

The scale of any economic impact is a function of how many 'visitors' attend an event, how many of them stayed overnight in commercial accommodation; and how much they spend in the local economy. The latter point is also a function of the amount of supply in a local economy that can absorb the 'economic shock' of tens of thousands of people gathering in a location for a one-day event.

7.2.1. The use of overnight accommodation

Table 7.2 provides an analysis of spectators and the amount of commercial accommodation that was used.

Table 7.2 - Accommodation spend by event-specific visitors

	Clones	Co. Monaghan	Thurles	Co. Tipperary
Eligible spectators	28,356	27,976	44,206	43,489
Overnight commercial stayers	375 (1%)	1,220 (4%)	1,081 (2%)	1,958 (5%)
Average trip duration (nights)	1.00	1.11	1.00	1.43
Commercial bed nights	375	1,349	1,081	2,806
Cost per bed night	€29.35	€64.74	€61.52	€63.34
Accommodation spend	€11,006	€87,332	€66,514	€177,775

A one-day event does not attract significant numbers of overnight stayers, with proportions ranging from 1% to 5%. Most people would consider attending a 70-minute match within a few hours' drive from home to be a day trip. A more subtle point is that small towns like Clones and Thurles do not have the bed stock to accommodate large numbers of visitors. It is therefore no surprise that the small minority of people who do stay overnight tend to spill out into the wider county area, where there will be greater availability of supply. These observations are reflected in the overall accommodation spend figures, which are relatively modest contributions to the total economic impact for the events.

7.2.2 Spending on items other than accommodation

Table 7.3 details expenditure on items other than accommodation, such as food and drink, shopping, and local travel at the two levels of geography for each event. On average, each event-specific visitor to the Football was worth €43.91 per day to the Clones economy and €52.00 per day to the Co. Monaghan economy; and for the Hurling the corresponding values were €62.82 in Thurles and €70.57 in Co. Tipperary.

Table 7.3 - Non-accommodation spend by event-specific visitors

	Clones	Co. Monaghan	Thurles	Co. Tipperary
Event-specific visitors	28,356	27,976	44,206	43,489
Average trip duration	1.00	1.00	1.00	1.02
Day visits / bed nights	28,356	28,105	44,206	44,458
Non-accommodation spend / day	€43.91	€52.00	€62.82	€70.57
Non-accommodation spend	€1,245,126	€1,461,518	€2,777,226	€3,137,492

It is the day visitors and their spending locally that drives the vast majority of the events' economic impact with verifiable injections of €1.245m in Clones and €2.777m in Thurles. It is possible for local supply, such as bars, restaurants and shops to absorb the additional demand that an event attracts. In the short term we found that supply is increased by businesses incurring more staff hours such as overtime and temporary supply entering the economy in the form of catering trucks and the efforts of local Gaelic Games clubs. Apart from the expenditure on accommodation, relatively little is spent beyond the immediate host towns in the wider county. In the case of the Football there was a spillover of €0.22m

Table 7.4 - Total spend by event-specific visitors

	Clones	Co. Monaghan	Thurles	Co. Tipperary
Accommodation spend	€11,006	€87,332	€66,514	€177,775
Non-accommodation spend	€1,245,126	€1,461,518	€2,777,226	€3,137,492
Total spectator spending	€1,256,132	€1,548,850	€2,843,740	€3,315,267

These findings are not unusual for one day events and the patterns of accommodation use and average daily spend per person per day values are highly consistent with what we see regularly in other contexts.

7.2.3. Other types of spending

Spectators are not the only source of spending in a host economy attributable to an event. In the case of the Football and the Hurling, there were a significant numbers of paid workers and volunteers who helped to stage the events. At Clones there was an accredited workforce of 795 and in Thurles 1,020. To a greater or lesser extent, these people are mostly visitors and interact with the local economy. For example, some of the broadcast teams arrived the day before the matches and made use of commercial

Table 7.5 - Additional expenditure by event workforce and organisers

	Clones	Co. Monaghan	Thurles	Co. Tipperary
Workforce spend	€26,762	€43,145	€39,818	€67,909
Organiser spend	€82,919	€92,596	€14,430	€243,146
Total spend	€109,681	€135,741	€54,248	€311,055

and for the Hurling €0.36m, with small shares of the total economic impact attributable to spectators.

Bringing the data together for the spending of spectators on accommodation and other goods and services confirms accommodation as a small share of the economic impact made by visitors. In Clones the €11,006 spent on accommodation is less than 1% of the total impact and the highest values were found in Co. Monaghan and Co. Tipperary at around 5% each. Thus the vast majority (95%+) of the economic impact generated was on non-accommodation expenditure.

accommodation and restaurants.

Beyond the workforce, the event organisers will make some expenditure in the local economy, primarily from the revenue they derive from ticket sales. As a notable example, the Provincial GAA organisers will pay a fee for stadium hire. This fee is retained in the host economy, but most of the ticket revenue is not. It is the amount that is spent locally, known as 'organiser spend' that we are interested in capturing for the economic impact estimate.

Table 7.5 aggregates the spending of the workforce and the organisers. The key point of note is that not accounting for these additional sources of spending will have the effect of materially understating the full economic impact of an event.

7.2.4. Bringing it all together

To bring all of the economic impact data for the two events together, Table 7.6 summarises the actual expenditure from each of the three sources to compute a Direct Economic Impact. We can with reasonable confidence state that the Ulster Football

Senior Championship brought in an additional €1.365m to the town of Clones, which equates to around €683 for every head of population. Equally, we can say that €3.626m of new money was brought into Co. Tipperary, of which 80% was spent in Thurles.

Table 7.6 - Total spend by event-specific visitors

	Clones	Co. Monaghan	Thurles	Co. Tipperary
Total spectator spending	€1,256,132	€1,548,850	€2,843,740	€3,315,267
Total workforce spending	€26,762	€43,145	€39,818	€67,909
Organiser spending	€82,919	€92,596	€14,430	€243,146
Direct Economic Impact	€1,365,813	€1,684,591	€2,897,987	€3,626,303
Multiplier	1.1	1.25	1.1	1.25
Indirect and Induced Effects	€136,581	€400,418	€289,799	€906,576
Total Economic Impact	€1,502,394	€2,105,739	€3,187,786	€4,532,878

For both events it is clear that the vast majority of the Direct Economic Impact is attributable to spectators with values ranging from 91% (Co Tipperary) to 98% (Thurles) with both Clones and Co. Monaghan at 92%.

It is common practice to develop Direct Economic Impact into Total Economic Impact to capture the supply chain and increased income effect that an economic shock such as a major event brings. Bars and restaurants will increase their stocks, which has a positive impact further down the supply chain. These are known as 'indirect' effects. Similarly, workers in the town who might do extra hours and receive higher wages will spend some of that money on other goods and services, which is an 'induced' effect. To estimate the indirect and induced effect, a multiplier is applied, the value of which is dependent on the size of the economy as the smaller the economy, the greater the potential for leakages. To illustrate the point, we adopt a modest multiplier of 1.1 for towns like Clones and Thurles and 1.25 for counties such as Monaghan and Tipperary.

The net effect is that the Direct Economic Impact increases by the value of the multiplier to give an estimate for Total Economic Impact that includes

indirect and induced effects. Thus, in the case of Clones, the initial economic impact of €1.366m quantified by the research increases to €1.502m to include the indirect and induced impacts.

7.3. The impact on businesses

Surveying spectators and the workforce is a method to quantify the economic impact of an event from the demand side, that is people's consumption of goods and services. It is good practice, but rarely conducted, to gauge the effect on the businesses that benefit from this spending, or the supply side. As part of the process, we surveyed businesses in Clones and Thurles as well as along the so-called 'pilgrimage routes' that spectators used to travel from their homes to either St Tiernach's Park or Semple Stadium.

The majority of businesses surveyed (65% at the Football, 71% at the Hurling) stated that they expected to be busier than normal. In many cases they took proactive steps to make the most of the opportunity presented. These included incurring more staff hours; altering the nature of their offering to be able to serve more people; and temporary expansion of businesses via the use of marquees and fields.

In addition to quantitative data, we also collected qualitative data via our interactions with local traders. A selection of verbatim quotes is provided below.

“It creates extra hassle, but the extra trade is worth it. The town relies on it.” (Thurles)

“It covers three months’ worth of business” (Clones)

“We change the way we operate on Ulster Final day. We close the restaurant for sit-down meals, and we set up a temporary bar in the yard. It’s easily our busiest day of the year” [Takings 300% up] (Clones)

“We’re 50% busier on Ulster Final day compared with other matches.” (Clones)

“It’s mad busy. You can’t move in the store.” (Thurles)

“Without the matches, we’d be struggling. We get the families rather than the hardcore fans. Limerick are always very good to us, but Cork come from the other side, so we don’t see them so much. Offaly supporters are also very good.” (Thurles)

“It’s great for the town. Messy but great.” (Thurles)

In addition to the measurable economic impact, there is also a valuable but immeasurable social impact attached to match days as revealed in the quote below by a local trader in Clones.

“The cultural impact is important to the town’s identity. It brings the town together, because all the discussion centres around how the teams are faring in the competition.”

7.4. Insight into spectators

The survey of spectators included some additional questions beyond economic impact looking at how engaged respondents were with various aspects of Gaelic Games such as the time they spend on Gaelic Games and how much they spend on Gaelic Games activities. For both events the average time spent on Gaelic Games per week was around nine hours, of which around half was spent watching matches. Other time contributions were made to playing and training, volunteering, coaching and officiating (albeit a minority on the latter category).

Weekly expenditure on Gaelic Games was around €45 for those at the Ulster Final and €58 at the Munster Final. These are high levels of expenditure by any standards and indicate that audiences for the Finals were particularly committed Gaelic Games enthusiasts across a range of engagement types.

7.5. Economic impact conclusions

The results of the two economic impact studies reveal that staging major Gaelic Games events can have a significant positive impact on their host communities. In both cases the money spent on food, drink, travel, accommodation and other items was significantly more than the cost of tickets. This finding is evidence of the economic impact that Gaelic Games has more widely beyond club activities and spectating. Clearly businesses in the host communities are grateful for the additional trade that major Gaelic Games events bring.

We are at an early stage of measuring the economic impact of Gaelic Games events. Actual impacts will depend on the capacity of stadia, the teams who are playing, location and so on. Future iterations of this research should analyse the economic impact of All-Ireland Finals at Croke Park as well as hallmark events in Ladies Gaelic Football and Camogie. It is likely that an All-Ireland Final in Dublin will stimulate more overnight stayers in commercial accommodation, longer dwell times, more international visitors, and higher levels of daily expenditure.

This additional insight into spectators and their wider engagement with Gaelic Games can be viewed as a test of concept for a wider nationally representative sample to establish the extent to which people are engaged in Gaelic Games in a more extensive sense. In addition to playing, spectating, coaching, volunteering and officiating, it would be commercially valuable to know about other types of engagement such as watching on television, following on the news, reading or watching online, reading newspapers, gambling, and playing Gaelic Games e-sports. This type of research is common amongst sports seeking to establish the reach of their sport and using that insight for development and commercial purposes.

8. CONCLUSIONS

8.1 Context

The GAA is an unusual governing body in the sense that its stated remit goes beyond the scope of administering sports and stretches out into a broader range of social and cultural objectives. The Association is also at a critical stage of its development as it commences integration with the Ladies Gaelic Football Association and the Camogie Association. As it embarks on its ambitions to become an integrated body and reflects on its current activities, it has been timely to evaluate the economic and social impacts of Gaelic Games.

The GAA and partners now have comprehensive economic and social value data that can be used to inform conversations with stakeholders, to support the integration of Gaelic Games in 2027, for advocacy purposes, as well as establishing a baseline from which future growth can be measured.

8.2 The economics of Gaelic Games

The Satellite Account for Gaelic Games confirms the scale of the sector in terms of consumer spending, Gross Value Added, employment, turnover and taxation. As absolute figures these measures may seem somewhat abstract. However, by contextualising them against the sport industry as a whole, it can be seen that Gaelic Games is a highly significant component of the sport industry in Ireland, representing 7.8% of consumer spending, 8.7% of Gross Value Added and 9.8% of employment. When looking at the economy of Ireland as a whole, the revelation that Gaelic Games is actually measurable at all, is a strong positive finding.

The Satellite Account for Gaelic Games establishes a replicable baseline for the industry, which can be reassessed in the future and used as a benchmark for measuring the ongoing development of Gaelic Games. By providing detailed insights into employment, Gross Value Added (GVA), and contributions to public revenue, the account serves as a valuable tool for policymakers and stakeholders to gauge the economic impact of Gaelic Games over time. Such assessments can inform strategies aimed at enhancing participation and investment in the sector.

8.3 The Social Value and Social Return on Investment of Gaelic Games

The purpose of a Social Return on Investment analysis is not solely to prove the value of an activity. Rather, it is to understand what changes and to use this knowledge to optimise the value created from activities. We recommend the SROI model is reviewed and updated on a periodic basis, to integrate new and improved evidence on the social impact of Gaelic Games as it emerges.

We recommend that the SROI participation and volunteering data is updated bi-annually, or when new participation and volunteering data becomes available. Furthermore, we recommend a refresh of the entire SROI model every five years, to incorporate new outcome evidence and financial proxy data. Such an approach would build a longitudinal understanding of the contribution of Gaelic Games to the changes people experience in their lives, as well as evidence to inform the GAA's management approach to making improvements to activities, initiatives and services in the future.

8.4 The economic impact of major Gaelic Games events

The results of the two economic impact studies reveal that staging major Gaelic Games events can have a significant positive impact on their host communities. In both cases the money spent on food, drink, travel, accommodation and other items was significantly more than the cost of tickets. This finding is evidence of the economic impact that Gaelic Games has more widely beyond club activities and spectating. Clearly businesses in the host communities are grateful for the additional trade that major Gaelic Games events bring.

Future iterations of this research should analyse the economic impact of All-Ireland Finals at Croke Park as well as hallmark events in Ladies Gaelic Football and Camogie. It is likely that an All-Ireland Final in Dublin will stimulate more overnight stayers in commercial accommodation, longer dwell times, more international visitors, and higher levels of daily expenditure.

This additional insight into spectators and their wider engagement with Gaelic Games can be viewed as a test of concept for a wider nationally representative sample to establish the extent to which people are engaged in Gaelic Games in a more extensive sense. In addition to playing, spectating, coaching, volunteering and officiating, it would be commercially valuable to know in a single source about other types of engagement such as watching on television, following on the news, reading or watching online, reading newspapers, gambling, and playing Gaelic Games e-sports. Whilst the participation rate might be around 6.6%, it would be no surprise if wider engagement with Gaelic Games proved to be a majority of the population.

8.5 Final comments

If our findings could be distilled in to a strapline, it would be:

“Gaelic Games: Good for the economy and good for society”

Professor Simon Shibli
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November 2024



