

CONFIDENTIAL

**Munster Hurling Senior Championship Final,
Semple Stadium, Thurles
Sunday 9th June 2024
The Economic Impact**

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EXECUTIVE SUMMARY

- This report presents the findings from research designed to estimate the economic impact of The Munster Hurling Senior Championship Final, held in Semples Stadium, Thurles on Sunday 9th June 2024. The research was commissioned by the Gaelic Athletic Association and was undertaken by Simon Shibli and David Barrett of the Sport Industry Research Centre (SIRC) at Sheffield Hallam University. The methodology is consistent with www.eventIMPACTS.com guidance.
- A total of **884** usable surveys was conducted with spectators at Semples Stadium during the event, supplemented by a further **188** questionnaires completed online, giving a total sample of **1,072** spectators. The additional expenditure associated with groups such as volunteers, contractors and on-site staff was measured via an additional survey of 86 people and an analysis of income and expenditure. Thus, there is robust data upon which to base the economic impact calculations for the Final.
- The economic impact of the event can be summarised as a €3.2m economic benefit for Thurles and a €4.5m benefit for Co. Tipperary. This finding may be regarded as a welcome bonus, as the main purpose of the event is to stage an occasion befitting the final of Munster's provincial hurling championship, rather than an explicit attempt to generate economic impact. The impact of the event is all the more notable for the size of the crowd relative to the population of Thurles.
- Analysis of spectator data reveals a group of supporters dedicated to following their respective teams. The majority of spectators at the event were attending their fourth game in the Munster Hurling Senior Championship. Almost all supporters (96%) stated that they were likely or very likely to attend further matches in the All-Ireland Series.
- The level of engagement with a range of activities underlines the commitment to club and county. Spectators at the Munster Final spend an average of just under 9 hours and €56 per week playing, spectating, coaching, officiating and volunteering in support of Gaelic Games

1. INTRODUCTION

- 1.1. This report presents the findings from research designed to estimate the economic impact of the Munster Hurling Senior Championship Final, held in Semple Stadium, Thurles on Sunday 9th June 2024. The research was commissioned by the Gaelic Athletic Association (GAA) and was undertaken by Simon Shibli and David Barrett of the Sport Industry Research Centre (SIRC) at Sheffield Hallam University.
- 1.2. The calculation of economic impact is in accordance with the economic strand of *eventIMPACTS*¹ - the national event evaluation framework developed by SIRC for UK Sport and its national and regional partners. The eventIMPACTS methodology is widely recognised internationally as a 'gold standard' 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 (Munster GAA and its subcontractors) that would not have occurred in the absence of the event". It has been calculated at two levels of geography: locally for **Thurles**; and, for the wider **Co. Tipperary** sub region.
- 1.3. To clarify further how the economic impact calculations have been structured relative to the two impact areas under consideration, we offer the following examples. Spending in Thurles by someone from (say) Clonmel attending the Final would be eligible for inclusion in the local economic impact estimate for Thurles but would be excluded from the estimate for Co. Tipperary. Any event-related expenditure elsewhere in Co. Tipperary, for example Templemore, that originates from outside the region would be included in the estimate at sub regional level only.
- 1.4. The treatment of expenditure depending on its origin and destination is illustrated in Figure 1. Apart from the spending that originated from within each catchment area, the economic impact estimates also exclude spending by 'casual' visitors, that is, people whose attendance at the Final was incidental to their visit to Thurles.

Figure 1 - Expenditure by geography

		<i>Destination of expenditure (host economy)</i>	
		Thurles	Co. Tipperary
<i>Origin of Expenditure</i>	Thurles	O	O
	Co. Tipperary	P	O
	Elsewhere in Munster	P	P
	Elsewhere	P	P

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

2. BACKGROUND

- 2.1 The Munster Hurling Senior Championship Final is the annual climax of the premier provincial inter-county Gaelic hurling competition. The tournament is a round robin competition, featuring five of Munster's six counties, and culminates in a play-off to determine the champions in June, having moved from its traditional date in the calendar of the third Sunday in July. Thurles has played host to the final on more than 50 occasions, and 14 times (including replays) since 2000.
- 2.2 The Munster Championship is organised by the Munster Council of the GAA (Munster GAA). Since assuming its current format in 2018, the championship has recorded consistently high attendances. It is traditionally considered the most challenging of the provincial inter-county competitions and in recent years winning teams have gone on to find success in the All-Ireland championship, winning the Liam McCarthy Cup on eight occasions in the last ten years.
- 2.3 This year's Munster Final drew particular attention because of Limerick's 'Drive For Five' – an ultimately unsuccessful attempt to win an unprecedented fifth consecutive All-Ireland title. The game attracts considerable media interest from across the island of Ireland, with live radio and television coverage on RTÉ, in addition to several local radio broadcasters.
- 2.4 The town of Thurles has a particular historical significance to Gaelic Games. The Gaelic Athletic Association (GAA) was founded at the Hayes Hotel in the centre of the town in 1884, and a statue of Dr Thomas Croke stands nearby. Many supporters gather here in advance of the game, congregating in the bars surrounding Liberty Square, and make their way towards the stadium in time for the throw-in. This route is lined with fast food stalls and pop-up sellers of flags and other merchandise.
- 2.5 The volunteers and paid staff working at the event typically arrive early on the day of the game, with the exception being ground staff and broadcast technicians. Entertainment is laid on in advance of the game to encourage spectators to enter the stadium in good time. Some supporters bring picnics and packed lunches, partly to manage the overall cost of the day and partly because the facilities at ground are very busy with long queues.
- 2.6 Semple Stadium is the largest sports stadium in Munster and regarded by many as the spiritual home of Munster Hurling. The stadium holds up to 45,690 spectators, of which 24,000 are seated, and plans are in place to increase capacity to 55,000, subject to funding. The size of the ground is all the more remarkable given the population of the town, which stands at just under 8,185 people². The majority of spectators are accommodated in covered seating running down both sides of the pitch, with open terraces behind each goal. Tickets for the game, which had to be purchased online in advance, typically cost €45 for adults, €40 for concessions and €5 for juveniles (though standing terrace tickets are discounted). The event is staffed by volunteers from across Munster, many of whom are members of Thurles Sarsfields GAA club, whose grounds are adjacent to the stadium.
- 2.7 The town is served by Iarnród Éireann a short walk from the stadium, with special trains laid on for supporters of both teams. Most supporters arrive by car, however. The geography of Thurles and its road network place constraints on car access, and a traffic management plan is put in place by An Garda Síochána. Drivers are directed towards the numerous official and

² <https://visual.cso.ie/?body=entity/ima/cop/2022&boundary=C04160V04929&guid=4034eafe-ccec-4768-b728-9f127800903a>

unofficial car parks in and around Thurles, many of which are located on the pitches of local GAA clubs. Congestion after the game is significant, leading to delays on departure.

2.7 This report focuses primarily on the economic impact of the event, but also includes feedback on certain aspects of spectator engagement, notably:

- Attendance at matches in the Munster Championship and All-Ireland Series
- Measures of time and money spent per week engaging with Gaelic games in various ways: participation, spectating, coaching, officiating and volunteering.

3. METHODS

3.1. A combination of fieldwork and desk research was used to derive the economic impact of the Munster Hurling Senior Championship Final on Thurles and the wider Co. Tipperary economy. Primary data was collected from spectators in and around Semple Stadium using a team of research assistants from Sheffield Hallam University, who recruited respondents by inviting them to fill in a paper-based self-completion survey. A copy of the questionnaire is available in Appendix A and was designed to capture the key information listed below.

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

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

3.2. A total of **884** usable surveys was conducted with spectators at Semple Stadium, supplemented by a further **188** completions of an online version of the questionnaire, giving a total sample of **1,072** spectators. Results based on a random sample of this size are subject to a maximum sampling error of +/- 3 percentage points at the 95% confidence level. Thus, there is robust data upon which to base the economic impact calculations for the Final.

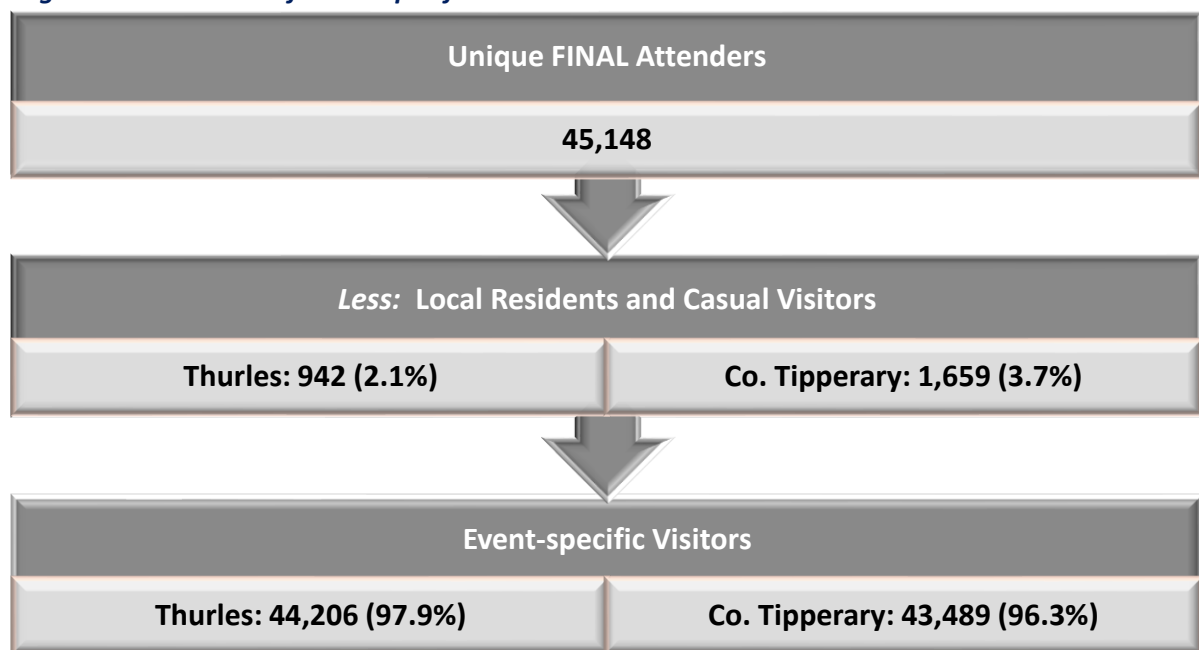
3.3. The additional expenditure associated with groups such as contractors and on site staff was measured in two ways. First, a brief survey was carried out at the venue on the day preceding the event and on the day of the Final itself. A further 86 respondents were interviewed, (Appendix C). Second, organisers' spending in the Thurles and Co. Tipperary economies was estimated based on analysis of the event's budget. We have not had full access to the event's budget and spending patterns, but through discussions with event organisers, as well as what some contractors have been prepared to disclose, it has been possible to piece together a credible estimate for how much of the event's economic activity was retained within Thurles and Co. Tipperary.

4. ECONOMIC IMPACT FINDINGS

Match Spectators

- 4.1. Admissions to the Munster Hurling Senior Championship Final at Semple Stadium were recorded as **45,148**. For a one day event we know that the 45,148 admissions were made by 45,148 unique individuals. However, the important point of note is that often certain people spend money on behalf of others and therefore any expenditure made must be down weighted by the number of people on whom it was made. As an example, if a hotel room for two people is €100 per night, then the spend per person per night is €50.
- 4.2. Overall, 2.1% of spectators were either normally resident in Thurles (locals, 0.7%) or were not present in the area specifically to attend the game (casuals, 1.4%). Thus, the impact calculation for Thurles is based on **44,206** non-local, event-specific visitors (i.e. 45,148 less 2.0% deadweight). The impact calculation for Co. Tipperary is based on **43,489** event-specific visitors, since 3.7% of the survey respondents resided in Co. Tipperary (2.4%) or were casuals (1.3%). A full breakdown is shown in Figure 2.

Figure 2 - Derivation of Event-Specific Visitors



- 4.3. Based on the spectator survey, we found that 2.4% of event-specific visitors to Thurles stayed overnight in paid accommodation locally, for an average of 1 night at a cost of €61.52 per person per night (PPPN). The associated revenue for local accommodation providers in Thurles is estimated at **€66,514**. The corresponding estimate for the accommodation sector in the Co. Tipperary economy is **€177,775** based on 2,806 commercial bed nights in the region at an average of €63.34 PPPN - see Table 1.

Table 1 - Accommodation spend by event-specific visitors

	Thurles	Co. Tipperary
Overnight commercial stayers	1,081	1,958
Average trip duration (nights)	1.00	1.43
Commercial bed nights	1,081	2,806
Cost per bed night	€61.52	€63.34
Accommodation spend	€66,514	€177,775

- 4.4. Table 2 shows the expenditure by all event-specific attenders (including overnight commercial and non-commercial stayers as well as day visitors) on items other than accommodation, such as food and drink, shopping, and local travel at the two levels of geography. On average, each event-specific visitor was worth €62.82 per day to the Thurles economy and €70.57 per day to the Co. Tipperary economy. In aggregate terms, this equates to spending of c. **€2,777,226** and c. **€3,137,492** at local and sub-regional level respectively.

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

	Thurles	Co. Tipperary
Event-specific visitors (from Figure 2)	44,206	43,489
Average trip duration (days / nights)	1.00	1.02
Total day visits / bed nights	44,206	44,458
Non-accommodation spend per day / night	€62.82	€70.57
Non-accommodation spend	€2,777,226	€3,137,492

- 4.5. Combining the data in Table 1 (accommodation) and Table 2 (other spend), the additional expenditure by event-specific visitors amounted to **€2,843,739** in Thurles and **€3,315,248** in Co. Tipperary as shown in Table 3.

Table 3 - Additional expenditure by event-specific visitors

Item	Thurles	Co. Tipperary
Accommodation spend	€66,514	€177,775
Other spend	€2,777,226	€3,137,492
Total spend	€2,843,739	€3,315,248

Event Workforce - Volunteers, Media and Other Staff

- 4.6. The event was delivered by a combined workforce of 1,020 professional staff and voluntary stewards and officials. Paid staff working over the weekend of the event included employees of media organisations such as radio and television broadcasters, as well as members of the national and regional press. Volunteers working on the day of the final included stadium stewards, turnstile operators, officials of the provincial council, and members of Thurles Sarsfields GAA club providing catering services.

- 4.7. The analysis of spectator spending data was replicated for the event workforce and the survey questionnaire can be seen in Appendix B. In total, only 8.1% of the workforce were local residents of Thurles. The estimate of the impact on Thurles is therefore based on **937** non-local volunteers, media and other staff, while the figures for Co. Tipperary are based on **700** members of the workforce, (31.4% of the survey respondents being residents of the county).
- 4.8. According to the workforce survey, 2.5% of the event staff stayed overnight in paid accommodation in Thurles, for an average of 1 night at an average cost of €50 per person per night (PPPN), producing additional revenue for local accommodation providers of **€1,186**. In Co. Tipperary, the workforce generated 178 commercial bed nights at an average of €62.50 PPPN, giving a figure of €11,119 in revenue for accommodation providers..
- 4.9. Each member of the workforce spent an average of €41.23 per day in the Thurles economy and €73.66 per day in the economy of Co. Tipperary. This amounts to a total of **€39,632** in the town and **€56,789** in the county.
- 4.10. Combining the accommodation and other spending, the additional expenditure by event-specific visitors amounted to **€39,818** in Thurles and **€67,909** in Co. Tipperary as shown in Table 4.

Table 4 - Additional expenditure by event workforce

Item	Thurles	Co. Tipperary
Accommodation spend	€1,186	€11,119
Other spend	€38,632	€56,789
Total spend	€39,818	€67,909

Organisers

- 4.7. The spending of visitors shown in Tables 1-4 excludes ticket revenue income and how it was used by the organisers in terms of where it was spent. It is known that 45,148 tickets were sold for the event, and that the total revenue from ticket sales was **€1,390,094**, giving an average price per admission of €30.79 (i.e. €1,390,094 / 45,148). Table 5 outlines how this money was used and how it benefited the economies of Thurles and Co. Tipperary.

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

	€s	Thurles	Co. Tipperary	Munster	Ireland
Ticketing costs	€93,320	€0	€0	€0	€93,320
Venue costs	€343,475	€10,730	€243,146	€89,600	€0
Other costs	€185,009	€3,700	€0	€37,235	€144,074
Totals	€621,804	€14,430	€243,146	€126,835	€237,394

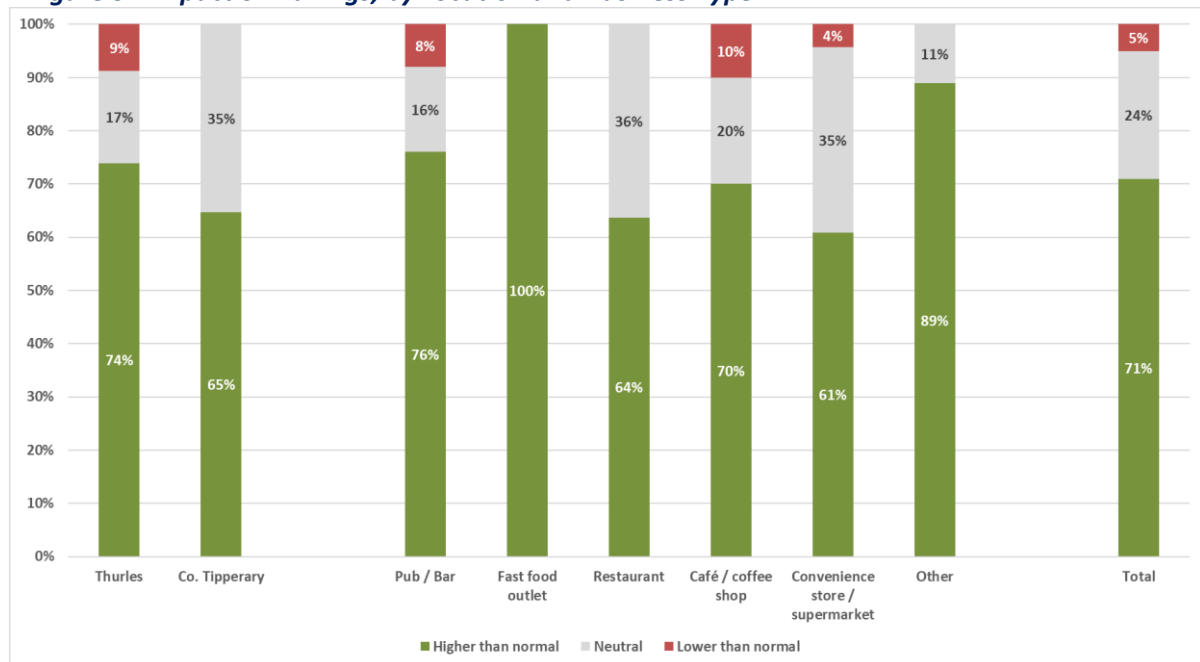
- 4.8. The data in Table 5 is derived from event accounts shared by Munster GAA. The economic impact of the event made by organisers spending income derived from ticket sales was **€10,730** in Thurles with an additional **€243,146** spent in Co. Tipperary, giving a total Co. Tipperary benefit of **€253,876** (i.e. €10,730 plus €243,146). Venue costs were almost entirely

accounted for by stadium hire fees, while ticketing costs relate to commission fees paid to resellers. Other costs included expenditure on production, artists fees (for pre-match entertainment), promotion and marketing. It is notable that with the exception of venue costs, the majority of expenditure on the event and the operational surplus generated from ticket sales has accrued to other counties in Munster and the rest of Ireland, rather than Thurles or Co. Tipperary.

Businesses

4.9 Researchers were active in Thurles and the surrounding areas in the days preceding the game, talking to 89 local businesses about the impact of the Munster Senior Championship Final on trade. Particular attention was paid to business on traditional 'pilgrimage routes' to Thurles from Clare and Limerick. Businesses (primarily pubs, cafes and convenience stores) as far afield as Borrisoleigh and Dolla to the north, Cashel and Tipperary to the south and well-known pilgrimage locations were surveyed for this reason. The survey questionnaire can be seen in Appendix C.

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



4.10 Figure 3 shows that the clear majority of traders (71%) expected higher takings than a normal Sunday. Traders in Thurles (74%) are marginally more likely to be busier than normal in comparison with those elsewhere in Co. Tipperary (65%). One in three businesses in Tipperary said that they expected no difference in takings on the day of the game. It is also notable that many traders on the pilgrimage routes through Munster would expect their takings to vary depending on which teams played in Thurles. Business on routes from the south fare particularly well when Cork play Tipperary for example, as supporters travel in significant numbers.

4.11 Pubs and bars, fast food outlets, restaurants, and newsagents were almost unanimous in reporting a positive impact on trade from the Munster Final, while some cafes and coffee shops expected to be quieter than usual, with most of these were located in Cashel. Similarly, 35% of convenience stores and supermarkets in the same locations reported a neutral effect on trade.

- 4.12 Qualitative feedback from traders noted that for many businesses in Thurles, Munster Final was one of the busiest days of the year. On average, businesses surveyed paid out an extra €241 in wages, deploying 16 additional hours of staff time. There was also some evidence that businesses in Thurles changed their mode of operations to make the most of the trading opportunity. At the Hayes Hotel for example, the restaurant delivered a cafeteria-style operation rather than table service, while many patrons availed themselves of drinks served from a marquee set up in the car park.
- 4.13 Some establishments in Thurles and elsewhere indicated to researchers that the timing and patterns of trade shifted over the weekend. Local custom is thought to be higher on the Saturday before the game, but almost absent on the day itself because of the congestion experienced in the town. Bars located on the pilgrimage routes forecast higher trade, especially if supporters of the winning county passed through on their return from the game.

Total Direct Economic Impact

- 4.14 The direct economic impact of the Munster Hurling Senior Championship Final at Semple Stadium on 9th June 2024 on Thurles and Co. Tipperary is summarised in Table 6. The additional visitor, workforce and organisational expenditure in Thurles and the wider Co. Tipperary economy is estimated at **€2,897,987** and **€3,626,303** respectively. For Thurles, the principal effect is from spectators, as local businesses were not directly involved in the staging of the event. Local businesses did benefit from incidental expenditure made by the organisers on hotels, bars and subsistence. Co. Tipperary benefits from the spillover effect from Thurles which is unable to absorb the economic 'shock' of the Final itself, leading to the additional demand for goods and services rippling outwards into surrounding areas.

Table 6 - Direct Economic Impact Summary

Group	Thurles	Co. Tipperary
Match spectators	€2,843,739	€3,315,248
Volunteers, Media and Other	€39,818	€67,909
Organisers	€14,430	€243,146
Direct Economic Impact	€ 2,897,987	€ 3,626,303

Total Economic Impact

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

Table 7 - Total Economic Impact Summary

Group	Thurles	Co. Tipperary
Direct Economic Impact	€ 2,897,987	€ 3,626,303
<i>Multiplier</i>	<i>1.1</i>	<i>1.25</i>
Indirect and Induced Effects	€ 289,799	€ 906,576
Total Economic Impact	€ 3,187,786	€ 4,532,878

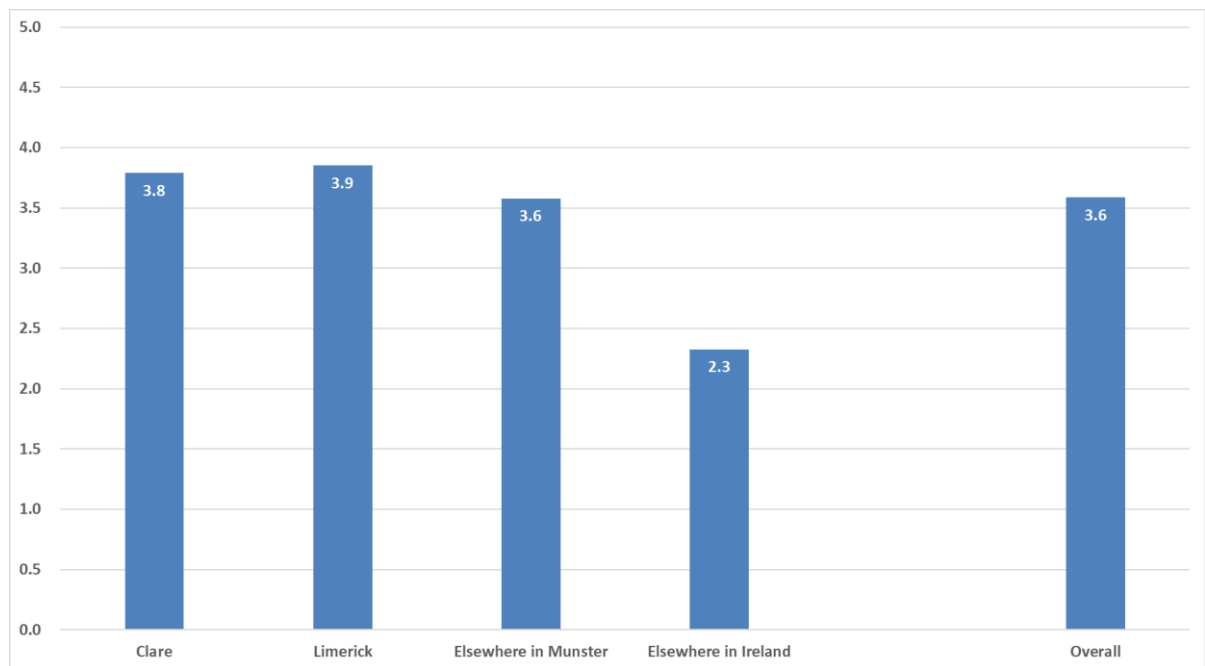
4.16 The economic impact of the event can be summarised as a €3.19m economic benefit for Thurles and a €4.53m benefit for Co. Tipperary. This finding may be regarded as a welcome bonus, as the main aim of the event is to stage an occasion befitting the final of Munster’s provincial hurling championship, rather than an explicit attempt to generate economic impact. The impact of the event is notable for the size of the crowd relative to the population of Thurles. If we consider just the €2.89m of direct economic impact in Thurles and assume a population of 8,200 people, the economic impact of the event equates of €354 per resident.

5. FURTHER AUDIENCE INSIGHTS

Attendance at Other Munster Championship Matches

5.1. Event organisers were keen to gather additional insight into engagement with both the Munster Championship and the All-Ireland Series. The majority of spectators (76%) attended three or more games in the Munster Championship, including the Final. Figure 4 shows that on average Munster-based fans attended at least three games in the Championship (3.6), with figures for fans of Clare (3.8) and Limerick (3.9) suggesting that they watched their teams in at least three round robin games in addition to the final. Spectators from elsewhere in Ireland (2.3) attended fewer Munster Championship games on average, A provincial final may be enough of a ‘draw’ to make the journey worthwhile, but the logistics and financial costs of going to more games force spectators from other provinces to be selective in deciding which fixtures to attend, particularly when other games are available to watch locally.

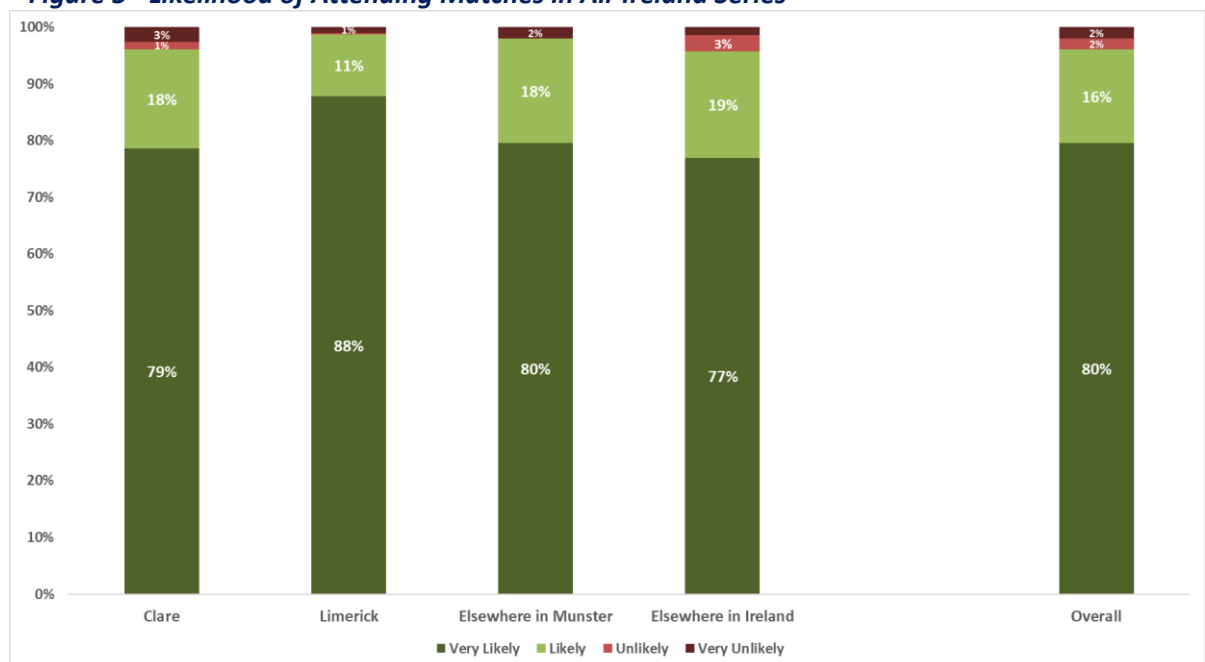
Figure 4 - Matches attended in the Munster Championship



Intention to Attend All-Ireland Series

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

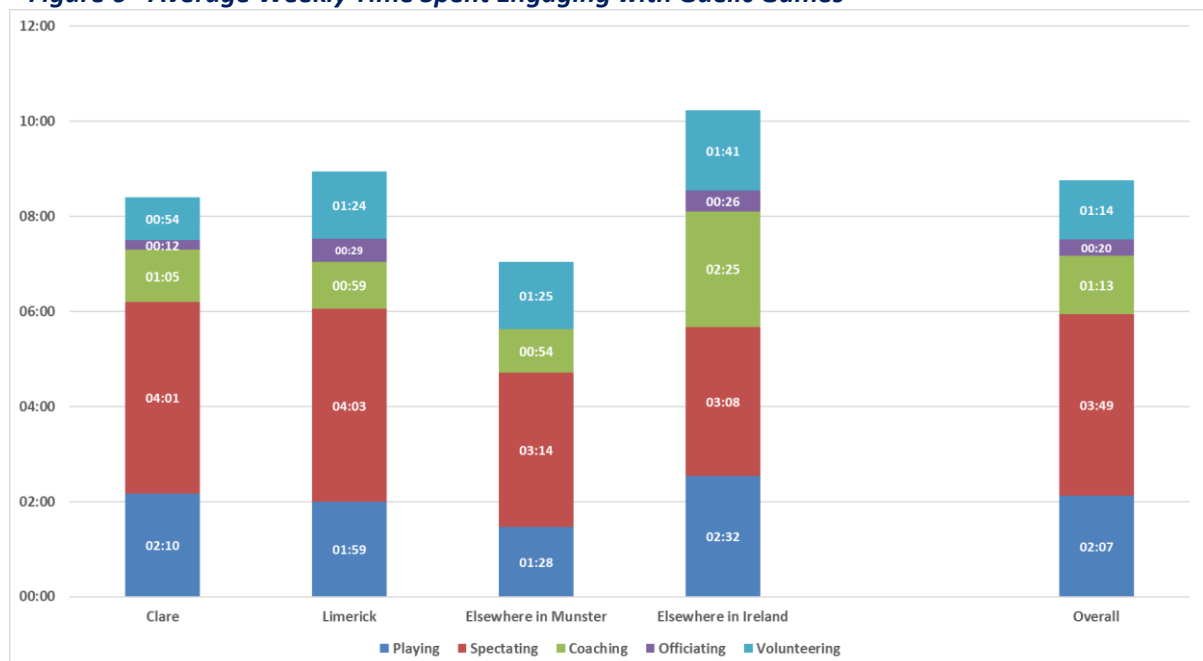
Figure 5 - Likelihood of Attending Matches in All-Ireland Series



Regular Engagement with Gaelic Games

- 5.3 The value of Gaelic Games is not restricted to the economic impact of major games, but also includes the direct benefits of participation and the indirect social benefits which come supporting the clubs and counties in other ways. Figure 6 and Figure 7 show how it is possible to quantify, albeit in crude terms, regular engagement of players, spectators and others with Gaelic Games. The graphs show how the sum total of activity may be equated to the contribution of time and money to participation, coaching, officiating, volunteering, and spectating.
- 5.4 Spectators at the Munster Final spend an average of just under 4 hours per person per week watching Gaelic Games. This equates to 3 full-length games, though there is no distinction in the data between watching in person and watching coverage of matches on television. Playing consumes slightly more than 2 hours, while coaching and volunteering account for an average of 1.25 hours each. The average time spent officiating is 20 minutes, reflecting the fact that only a small proportion of respondents engage as referees or umpires.
- 5.5 The pattern is relatively consistent among respondents from Munster, though there are minor variations between counties. Limerick residents volunteer for nearly 1.5 hours per week for example, while those living in Clare play for more than 2 hours. It is also of interest to note that spectators from elsewhere in Munster report spending less time playing and watching Gaelic Games while those from the rest of Ireland report higher levels of playing and coaching engagement. The overall time commitment per week averages just under 9 hours among the respondents to the spectator survey.

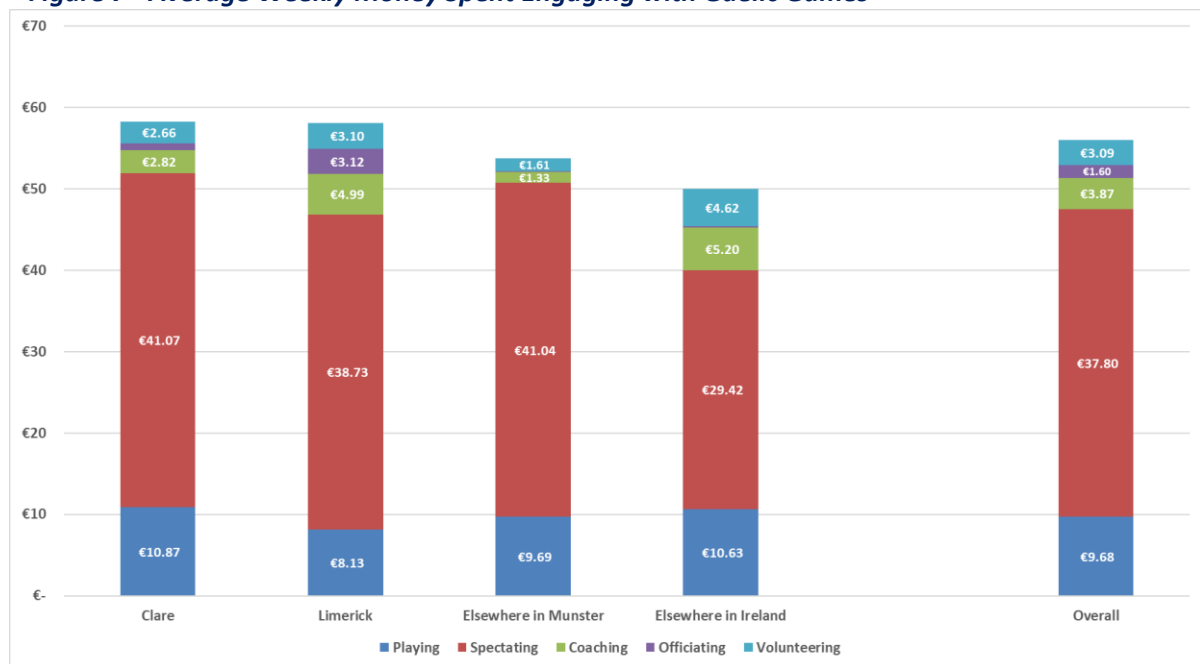
Figure 6 - Average Weekly Time Spent Engaging with Gaelic Games



- 5.6. In financial terms, the impact of engagement with Gaelic Games among the survey respondents is also notable. Figure 6 shows that playing costs an average of €9.68 per week, while spending on spectating comes to just under €38. Coaching (€3.87), volunteering (€3.09), and officiating (€1.60) generate lower costs on average. Again, figures vary by

county with Clare supporters spending the most on playing (€10.87) and spectating (€41.07), but the average financial commitment is considerable at €56 per week.

Figure 7 - Average Weekly Money Spent Engaging with Gaelic Games



5.7 Taken together, these figures show that the supporters attending the Munster Senior Hurling Championship Final display considerable levels of dedication to their teams. Typically, supporters attended three round robin games as well as the final and are likely or very likely to have travelled to watch subsequent matches in the All-Ireland Series. Their weekly commitment to a range of Gaelic Games activities amounts to almost 9 hours of time and €56 in spending, of which just under 4 hours and €38 are allocated to spectating. They might therefore reasonably be considered to be ‘committed’ supporters of Gaelic Games.

6. CONCLUSIONS

Summary of the key findings

6.1 The Munster Hurling Senior Championship Final is an annual event which brings a significant influx of visitors to a town of just over 8,000 residents. The results of this research reveal a range of positives that are encouraging for organisers of the occasion planning future events. These are summarised in the bullet points below.

- There was a positive total economic impact on Thurles of around €3.2m and around €4.5m for the wider Co. Tipperary economy. This impact was achieved by: visitor and workforce spending; contracts awarded to local businesses; and the spending of contractors in the local area.
- Spectators attending the game spent an average of around €63 in Thurles, and €71 in Co. Tipperary. The total direct impact of the event was €2.84m in the town and €3.32m in the county. The direct impact on Thurles equates to around €354 for every resident of

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

- Spending by volunteers, media and other staff was relatively low by comparison with the spectators. The workforce spent an average of €41 in Thurles and €74 in Co. Tipperary. Most of the workforce travelled to the event on the morning of the game and returned home the same day.
- Businesses in Thurles and surrounding areas benefitted from the expenditure of spectators attending the game. Around three quarters of traders in the town expected higher takings compared with a normal Sunday.
- The majority of spectators at the event were attending their fourth game in the Munster Hurling Senior Championship. Almost all supporters (96%) stated that they were likely or very likely to attend further matches in the All-Ireland Series.
- Spectators at the event were committed supporters of Gaelic Games, spending an average of just under 9 hours and €56 per week playing, spectating, coaching, officiating and volunteering in their clubs and counties.

Learning

- 6.2 The Munster Hurling Senior Championship Final is one of the highlights of the Irish sporting calendar. It is remarkable that an event of this scale and significance is regularly staged in a rural town with around 8,000 residents. The economic impact of the game should be seen in this context, but it is also important to highlight the loyalty of the spectators who follow their team, as well as the contribution of the many volunteers who support the event. Their dedication is evident from the considerable amount of time and money they commit to Gaelic Games every week.

Simon Shibli
David Barrett
October 2024

APPENDIX A: SPECTATOR QUESTIONNAIRE



ECONOMIC IMPACT RESEARCH

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

- Including today, how many games in the 2024 Munster Senior Hurling Championship have you attended? games
- Please tell us the name of the town or locality where you live: _____
- What is the first half of your Eircode/postcode? We ask this to understand where you have come from to be at the game today. We do not use this data for any other purpose.
- In a typical week, how much time do you spend on Gaelic Games-related activities?

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

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

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

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

Go raibh maith agat. Thank you for your help and enjoy the rest of your time at the game today.

43720

Office use only: Ó Coinneáin Ó Riáin Davin Maher The Dome Town



APPENDIX B: VOLUNTEERS, MEDIA AND OTHER GROUPS QUESTIONNAIRE



ECONOMIC IMPACT ASSESSMENT (Volunteers Media & Other Groups)

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

- Which of the following best describes your role at Munster Senior Hurling Championship Final?

<input type="checkbox"/> Print media	<input type="checkbox"/> Photographer	<input type="checkbox"/> TV/radio	<input type="checkbox"/> New media	<input type="checkbox"/> Event staff
<input type="checkbox"/> Volunteer	<input type="checkbox"/> Sponsor / VIP	<input type="checkbox"/> Contractor	<input type="checkbox"/> Other (please specify...) _____	
- For which organisation are you working? *For research purposes only & will not be shared* _____
- For how many days are you in Co. Tipperary (i.e. Thurles linked to your trip to the Munster Final?)
- Where do you live?

<input type="checkbox"/> Co. Tipperary	<input type="checkbox"/> Elsewhere in Munster
<input type="checkbox"/> Elsewhere in Ireland	<input type="checkbox"/> Overseas (please specify...) _____
- Which of the following best describes where you are staying while attending Munster Final? *(See map on reverse)*

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

<input type="checkbox"/> A Hotel / B&B	<input type="checkbox"/> Rented accommodation / Air BnB
<input type="checkbox"/> With Friends / Relatives (<i>Go to q.9</i>)	<input type="checkbox"/> Other (please specify...) _____
- How much (if anything) is your ACCOMMODATION COSTING PER NIGHT? €
- And for how many people is your accommodation expenditure?
- For how many nights are you staying in this accommodation?
- EXCLUDING ACCOMMODATION (to the nearest €), how much per day do you expect to spend on yourself and others in Co. Tipperary during your visit to the Munster Final? *(See map)* €
- On average (to the nearest €) how much of the expenditure in Q10 has been/will be spent in the following categories? *Only include the expenditure of your own money - do not include money spent on hotels unless extra to room & board.*

Food and drink	€	<table border="1" style="width: 40px; height: 20px;"></table>	Merchandise/programmes	€	<table border="1" style="width: 40px; height: 20px;"></table>
Shopping/souvenirs	€	<table border="1" style="width: 40px; height: 20px;"></table>	Entertainment (<i>including green fees</i>)	€	<table border="1" style="width: 40px; height: 20px;"></table>
Travel in Tipperary	€	<table border="1" style="width: 40px; height: 20px;"></table>	Other (<i>e.g. petrol/parking</i>)	€	<table border="1" style="width: 40px; height: 20px;"></table>
- EXCLUDING ACCOMMODATION, in TOTAL how much will you have spent in Co. TIPPERARY during your trip to/work at the Munster Senior Hurling Championship Final? €
- INCLUDING YOURSELF, on how many people is the expenditure in Q12?

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

- Will you visit other parts of Ireland on your trip to/work at the Munster Final? Yes No (*Go to end*)
- How many additional days are you likely to spend visiting other parts of Ireland?
- If applicable how much will you spend on accommodation in the rest of Ireland? €
- And excluding accommodation how much do you expect to spend in the rest of Ireland (outside Co. TIPPERARY) on your trip to/work at the Munster Senior Hurling Championship Final? *(include travel from / spend at airport, ferry or meals if you are eating outside Co. Tipperary)* €

31444

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



APPENDIX C: BUSINESS QUESTIONNAIRE



ECONOMIC IMPACT ASSESSMENT - Business Survey

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

1. Where is the business located?

2. What is the full Eircode?

						-						
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3. What is the name of your business?

4. What is the nature of your business?

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

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

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

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

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

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

€

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 or

--	--	--

 %

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

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

€

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

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

- Positive effect
 No effect
 Negative effect

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

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

Name _____ Phone or Email _____

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

