



EVENT PRODUCTION INDUSTRY COVID-19 WORKING GROUP

OIREACHTAS SPECIAL COMMITTEE COVID-19 RESPONSE

RECOVERY OF THE ARTS & ENTERTAINMENT INDUSTRY



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EXECUTIVE SUMMARY

Live events continue through wars, they raise money for famine, they raise the spirits of a nation in times of need and provide a focus in times of celebration. Never, in the history of staging live performance and events, has there been such a sudden and total stop to work in Ireland, as happened on the 12th of March 2020.

In response to the crisis in the live event industry, created by the Covid-19 pandemic, this working group was elected, to represent the interests and concerns of the individuals and business involved in producing live events and performance.

Our critical supports, needed from the State:

1. The Covid Payment, and Wage Subsidy to continue for Event and Arts workers until the mass gathering ban and social distancing are not required for medical safety in Ireland.
2. Business grant support of 20% of 2018 turnover, for SMEs in the Event and Arts sector, to aid with rent and bank loan payments.
3. Funding of an Industry Assistance Programme to cater for the mental health and wellbeing of Event and Arts workers during this time of crisis.
4. Reduced VAT rate of 13.5% for labour and 5% for tickets for the Event and Arts sector.
5. Waiver of commercial rates for empty places of entertainment and warehousing of event equipment, for 36 months.
6. Establishment of a Cross Departmental task force along with representatives of the live event sector, to further the recovery of the sector and establish method statements from relevant authorities to ensure the safe reopening of venues and events.

Our critical supports, needed from other institutions and organisations:

1. Bank Loan and Lease payment holidays, until the mass gathering ban and social distancing are not required.
2. Insurance policies revaluated to reflect reduced risk, in PLI, ELI, and vehicle insurance.
3. Rent assistance and rent holidays, until the mass gathering ban and social distancing are not required

Why:

Investment: Funds devoted to keeping the Events sector intact, are an investment. Every €1 spent in the sector results in over €6 being added to the economy. The Event industry is worth €1.3 billion to the Republic of Ireland each year, and €1.7 billion to the whole island of Ireland each year. This is a thriving viable industry, which must be protected for the time it is prevented from working, by the requirements to keep Ireland safe.

Skill Retention: The Event and Entertainment sector is staffed by qualified and experienced people, with very transferable skills. It has taken decades to bring together these skills and experience, in this country. These people are not highly paid, they work on these events because they have a passion for the work. However, if driven to work in other industries they will get higher paid jobs or emigrate to other countries and will not return to the Irish live events industry. It is vital to retain these skills to staff events, large and small, in Ireland.

Brand Ireland: The Events sector employs a comparatively small number of people but makes a massive impact on both the island of Ireland, and when selling Ireland to the world. The Arts, Festivals and Events are the Ireland brand, sold throughout the world. Without our SMEs and individuals who make up the industry, the Ireland brand will be lost, and will not be available to the tourism and hospitality industries to sell.

Entire Year Lost: The vast majority of the Events industry work in annual cycles, the sector has lost an entire year's turnover – not just a few months. This was lost when most businesses and individuals financial reserves were at their low point, just leading up to St. Patricks celebrations, traditionally the start of the busy summer season. Although there will be a few events from September on, the event industry is powered by the large events & festivals, which will not be possible till 2021, and arena & theatre shows which will probably not return in full capacity this year.

SMEs: While nearly every business involved in the industry is an SME, employing a small number of people, most have very large inventories of equipment, from large sound systems for concerts, to kilometres of fencing for parades and events. All of this equipment is high quality and expensive and needs to be stored & maintained when not on site. SMEs are facing large premises rent bills, contents insurance costs, and repayments on bank loans and leases, with up to 12 months of no income. If these SMEs fail, the equipment and skill of the staff will be lost to the country. We will return to the days, twenty years ago, when the majority of our equipment & crew required to run large events had to be imported from outside Ireland.

Spirit: The Arts and Event industry will be needed more than ever in the years to come, to bring the spirit and enthusiasm of the nation of Ireland back to full strength. Events keep both local & national community spirit alive, from vintage steam rallies & threshings to St Patricks Festival, the National Ploughing and Electric Picnic. 92% of incomes⁴ of Event workers, have been affected by the requirement for a ban on mass gatherings to keep Ireland safe. Unless workers are protected, and their skills retained, the sector will not be able to play its valuable and considerable part in rebuilding Ireland's spirit and economy.

In conclusion: This is an industry of entrepreneurs, a business filled with people who have forged their own path, highly skilled and dedicated people who invest their own time and their own money to create, to create events and experiences, to allow others to make memories that will last a lifetime. The Live Entertainment Industry is a business of innovators and we will innovate again, we will move, we will adapt, we will create and we will return.

This is an industry that doesn't receive funding, we are commercial entities and we are successful at it. This was a thriving industry prior to Covid and it will be again. We don't want a hand out, we just need a hand up until it is safe for our industry to return to full capacity again.

THE EPIC WORKING GROUP

Live events continue through wars, they raise money for famine, they raise the spirits of a nation in times of need and provide a focus in times of celebration. Never, in the history of staging live performance and events, has there been such a sudden and total stop to work in Ireland, as happened on the 12th of March 2020.

The Irish Live Events industry has been decimated by the restrictions placed on mass gatherings and the need for social distancing on foot of the Covid-19 health crisis. For more than 3,500 full-time Live Events & Arts workers across Ireland, employment and revenue streams are now non-existent, with no real indication or guidance on when live events will return.

The people who work on live events understand – probably more than most, the requirement to keep the public safe. In fact, it is what we do on a daily basis, through every action and decision we take. We depend on the well-being and happiness of our audiences to pay our wages on every event we work on. We fully appreciate the restrictions to keep Ireland medically safe from the Covid pandemic. Unfortunately, the knock on effect of those protocols has been to create a crisis in our industry.

In response to the crisis in the live event industry, created by the Covid19 pandemic, this working group was elected by it's peers, to represent the interests and concerns of the individuals and businesses involved in producing live events and performance. The working group consists of people who are prominent in the production of the country's many large scale events and the representatives of the companies, promoters and venues that support these events. The people represented by EPIC are people & businesses involved in the actual production of live events, and promoters and venues that support and hold them.

The EPIC Working Group, has grown in a very short time to represent the 3500 fulltime and 15,000 part time workers and SME suppliers in the industry; and to be supported by promoters, venues, and festivals. They include MCD, Aiken, Live Nation, Festival Republic, The Gaiety, The INEC, The Olympia, Dolans, 3Arena, Electric Picnic, St. Patrick's Festival, Longitude, Indiependence and many others.

EPIC WORKING GROUP ELECTED MEMBERS



Sophie Ridley (Chairperson) - Event Safety Consultant & Event Controller. Event Controller Ed Sheeran Irish Tour, 2018, Co-ordinator of the Pedestrian & Transportation Sub Group & Deputy Event Controller Papal Visit 2018. Safety & Licensing Consultant to The Beatyard, Big Grill, Life and Forever Young Festivals as well as Hozier and Ireland's Fittest Family. She has worked on most of the major events in Ireland and with very many of the companies and crew, this working group is proud to represent.



Murt Whelan - Founder of Murt Whelan Sound. Audio supplier to festivals, concerts, tours and events including MCD, Cork Jazz Festival, Dublin Pride, Rose of Tralee, Roisin Dubh, INEC Killarney, Dolans, Galway Comedy Festival, The Coronas, Picture This, Gavin James, Walking On Cars, Clannad, Mary Black, Other Voices, Galway 2020, Mario Rosenstock, Keith Barry and Hermitage Green.



Pearse Doherty - Former Head of Production, Galway 2020 European Capital of Culture 2019 - May 2020. Head of Operations, Volvo Ocean Race, 2012. Head of Production Aiken promotions, Site Manager Electric Picnic 2013 - 2017, Site Manager Sea Sessions 2012 - 2017, Tour Manager Tommy Tiernan 2005 - 2018. Band Member, The Saw Doctors, 1988 - 2002.



Tony Killeen - Site Manager and Director of Production at St. Patrick's Festival. Site Manager for concerts at Slane Castle, Croke Park and the RDS as well as a variety of other events and festivals. Tony is also the Event Controller for the concert series at Trinity College, Irish Independent Park, Indiependence and New Year's Festival Dublin.



Liam Fitzgerald - Chairperson of the Association of Irish Stage Technicians. Technical Manager of the Bord Gais Energy Theatre. Site Manager for The Rolling Stones at Croke Park, Crew Boss for Bruce Springsteen at Croke Park. Production Manager and Lighting Designer for An tOireachtas, Oireachtas na Samhna Festival for twelve years.

EPIC WORKING GROUP ELECTED MEMBERS



Kim O'Callaghan - Project Manager and Deputy Event Controller for MCD's Slane, Croke Park, RDS, Pairc Ui Chaoimh and Aviva Shows. Deputy Project Manager and Deputy Event Controller for the Phoenix Park and Croke Park aspects of the 2018 Papal Visit to Ireland. Chief Operating Officer of The Olympia Theatre during the refurb of the iconic Dublin venue, 2015-2017. Founder of EVNTZ App.



Michael Young - Managing Director of Vision Safety Consultants. Clients include MCD Productions, Caribbean Premier League Cricket, Opera Ireland, Sea Sessions Festival, Life Festival, Galway Arts Festival, Dublin City Council, Galway County Council, Kilkenny County Council and Tipperary County Council.



Shane Dunne - Managing Director of Curve Music Management. Founder and Managing Director of Indipendence Music & Arts Festival. Project Manager for New Year's Festival, Dublin. Project Manager for the concert series at Irish Independent Park, Cork, St. Anne's Park, Dublin and many others. Former Production Manager of The Coronas and Nathan Carter as well as Tour Manager of a number of bands including Hudson Taylor. Former Manager of Night Summit at Web Summit (Dublin, Las Vegas & New Orleans). Promoter and Event Manager at MCD Productions.

A photograph of Barack and Michelle Obama walking through a massive crowd of people, waving. They are in the center of the frame, with the crowd filling the background and foreground. The image is partially obscured by a blue geometric shape on the left and a blue banner at the bottom.

WHAT ARE LIVE EVENTS?

Live Events are the organised celebrations, gatherings, concerts and festivals that have form a huge part of the fabric of Irish life.

Live events are community events such as A Taste of West Cork, The Galway Oyster Festival, the Irish Maritime Festival in Drogheda or the local Vintage Steam Rally. Many of these events are community based, but their impact is much broader and they are part of the Irish palette sold internationally by Failte Ireland, etc. These events use professional suppliers and people to give them infrastructure and co-ordination. These are the people we represent.

Live events are the commercial events like concerts and festivals where Irish and international people gather in their thousands to hear their favourite national or international artist such as Metallica at Slane Castle, Tom Jones at The Marquee, Cork, Leonard Cohen at Lissadell House or Ennio Morricone at the 3Arena. These events need to be well managed and safe. All the infrastructure and personnel required to run these events are the people we represent.

Live events are the state supported and sponsored events such as State Visits, St. Patrick's Festival, the Special Olympics and international events such as Euro 2020 & the Ploughing Championships. These events require professional suppliers and staff to make them happen. We represent the people and contractors who make these events happen.



RECOVERY

WHAT DO WE NEED FOR RECOVERY?

FINANCIAL SUPPORTS

We are an intact cohesive resilient industry ready to respond to the relaunch of Ireland Inc. We do not need subsidies and grants in the normal course of our business. We will be prosperous and thriving again – however we do need the bridges to the point when we are up and running at full capacity.

SKILLS & SME RETENTION

The Live Event industry is a vibrant and profitable industry. The companies and personnel thrive on challenges and creative solutions are the back bone of what they do. The industry is highly skilled and these skills were not gained overnight.

These skills were learnt and nurtured over many years of work and experience. COVID-19 brought our country to a stand-still. Now as we go through the phases of re-opening, it is evident that Live Events will have a phase all of their own. We will not be back at a meaningful level of work for some time. It is important that the people and companies of live events are not forgotten.

The biggest fear is that we will start to lose the skilled labour force to other industries and will not retain the skills and production companies we need. Twenty years ago in Ireland almost all production staff and equipment had to be brought from outside the country.

For the first 5 years of Oxygen (1997-2002), the crew & production equipment for 4 out of the 5 stages, including the stages themselves had to be hired from the UK.

Now we have production houses and a skilled workforce so we can run events such as Electric Picnic and the visit of the Pope with entirely Irish production. During the 2008-2016 recession, the construction industry lost much of its skilled labour force and when the housing shortage reared its ugly head, we hadn't enough skilled people to meet demand. When Ireland re-opens to the world with the return of live events that are such a part of our national image, it is critical that we have the skills and companies to create these events.

If we do not maintain these supports now, when the time comes to turn the lights back on, there will be no one there to do it.

WHAT DO WE NEED TO HELP BUILD RECOVERY?

ENTIRE YEAR LOST

The vast majority of the Events and Arts industry work in annual cycles, the sector has lost an entire year's turnover – not just a few months. This was lost when most businesses and individuals' financial reserves were at their low point, just leading up to St. Patricks celebrations, traditionally the start of the busy summer season. The summer season powers the event industry.

SMEs: While nearly every business involved in the industry is an SME, employing a small number of people, most have very large inventories of equipment, from large sound systems for concerts, to kilometres of fencing for parades and events. All of this equipment is high quality and expensive, and needs to be stored when not on site. SMEs are facing large premises rent bills, contents insurance costs, and repayments on bank loans and leases, with up to 12 months of no income. These SMEs need to be protected to keep the equipment and skill of the staff inside the country, and drive the recovery.

CRITICAL SUPPORTS NEEDED FROM THE STATE

1. The Covid Payment, and Wage Subsidy to continue for Event and Arts workers until the mass gathering ban and social distancing are not required for medical safety in Ireland.

We need to retain the skills of the estimated 3,500 full time and 15,000 part time individuals and staff of the SMEs within our industry to help build the live event sector back to strength, to raise the spirits of the country as the recovery progresses.

2. Business grant support of 20% of 2018 turnover, for SMEs in the Event and Arts sector, to aid with rent and bank loan payments.

The infrastructure and equipment in the hands of the hundreds of SMEs spread across every county of the country are vital to the staging of events large and small. All of these SMEs still have bank loans, leases, warehouse rent, and insurance costs regardless of events taking place and dearth of income. These SMEs are vital to the recovery of our industry.

3. Funding of an Industry Assistance Programme to cater for the mental health and wellbeing of Event and Arts workers during this time of crisis².

Minding Creative Minds was set up as an Industry Assistance Programme for musicians and has been extended to look after production crew, staff and management. Some funding for the first year has been secured. In order to keep this programme alive for future years, and look after the welfare and mental health of our industry as it rebuilds, we need €115,000 per year to run the programme. We seek part of this to be paid for through funding via a resource organisation in the Arts Council's portfolio.

4. Reduced VAT rate of 13.5% for labour and 5% for tickets for the Event and Arts sector.

Currently there is a large double standard in the VAT rates on labour, with some charged at 23% (e.g. sound services) while the standard rate for labour is 13.5%, this needs to be reviewed. Currently the VAT rate on tickets is 13.5%, we are seeking this to be reduced to 5% in order to stimulate the live event industry sector.

5. **Waiver of commercial rates for empty places of entertainment and warehousing of event equipment, for 36 months.**

All over the country, in every county there are warehouses full of equipment which should be getting used for staging an event. Along with them there are theatres, music clubs, and other venues unable to open, while playing their part to protect the public. Even when allowed to open they will remain unprofitable while social distancing and mass gathering caps remain in place. We need those buildings to have rates waivers for 36 months, in order to keep their costs to a point whereby they can afford to open and help rebuild the spirit and economy of Ireland.

6. **Establishment of a Cross Departmental task force along with representatives of the live event sector, to further the recovery of the sector and establish method statements from relevant authorities to ensure the safe reopening of venues and events.**

All over the country there are incredibly creative people, who are already coming up with many ways to stage events, and open venues as restrictions start to lift. However, it is very difficult to check their proposals against what might be allowed or not, with so many agencies involved. There are extremely talented and experienced people who have spent their entire working life coming up with solutions to making events happen in the most difficult circumstances. We would seek to make use of the representatives of our industry, in forming a taskforce with members of various government departments and state bodies. This task force would assess the impact, devise state driven solutions, and industry driven solutions to further the recovery of our sector and therefore aid the recovery of our economy.

CRITICAL SUPPORTS NEEDED FROM OTHER INSTITUTIONS & ORGANISATIONS

1. **Bank Loan and Lease payment holidays, until the mass gathering ban and social distancing are not required.**

We need banks to have an understanding of our businesses – they can see their financial position prior to Covid 19 – there is no reason why they cannot return to the same position in the future but they need help in the interim.

2. **Insurance policies revaluated to reflect reduced risk, in PLI, ELI, and vehicle insurance.**

Insurance policies need to reflect that there is no public liability risk at the moment, a very reduced employers liability risk at the moment and a very reduced vehicle risk at the moment. The motor & private health insurance have acknowledged the reduced level of risk at this period – we need support to pressure our insurance companies to do the same

3. **Rent assistance and rent holidays, until the mass gathering ban and social distancing are not required.**

All supply & service companies have huge amounts of equipment housed in rented warehouses and buildings, some form of rent assistance or rent break is crucial to their survival.



Brand Ireland: The Events and Arts sector employs a comparatively small number of people, but makes a massive impact on both the island of Ireland, and when selling Ireland to the world. The arts, festivals and events are the Ireland brand, sold throughout the world. Our SMEs and individuals who make up the industry are vital to the recovery and retention of the Ireland brand. Supporting them will ensure the brand is available to the tourism and hospitality industries to sell.

BRAND IRELAND

FESTIVALS & EVENTS IN IRELAND THE NUMBERS



The following is just a brief snapshot of a fraction of the numbers relating to the loss of live events in Ireland in 2020.

12,000 Arts & Music Events Cancelled Since March 12th. (Source: Arts Council)

2.4 Million Audience Lost Up To The End Of May. (Source: Arts Council)

43 Agricultural Shows Cancelled
(Source: Ireland Shows Association)

62 Years Of Tidy Towns, Cancelled For The First Time. (Source: Tidy Towns)

61 Years Of The Rose of Tralee, Cancelled For The First Time. (Source: Rose of Tralee)

FOCUS ON GALWAY

A FRACTION OF THE EVENTS LOST IN 2020

252,748 People Attended The Galway International Arts Festival in 2018 (Source: Galway Arts Festival)

€40.8 Million. The Value of The Galway International Arts Festival to Galway

(Source: Galway Arts Festival)

20,000 Attendees & €7.5 Million Generated for Galway by The Galway Film Fleadh in 2019.

(Source: Galway Film Fleadh)

10,000 Attendees & €5 Million Generated for the Economy by The Vodafone Comedy Carnival

(Source: Vodafone Comedy Carnival)

TICKETMASTER

608 Events Cancelled

205 Postponed

748 Rescheduled

(Source: Ticketmaster, Data Correct to Mid June, 2020)



WHO DO EPIC REPRESENT?

EPIC Represents All Aspects of the Live Entertainment Industry. There are currently in excess of 2,000 SMEs and Sole Traders signed up to the EPIC Event Industry Census. There are in excess of 3,500 full time staff working in this industry with in excess of 15,000 part time staff. A brief outline of the roles are listed below.

ADMIN

Accounts . Box Office . Marketing . Event Directors . Promotion . Ticketing
Sponsorships . Digital

PRODUCTION

Audio Engineer . Lighting Technician . Artist Liaison . Backline Technician . Broadcast Engineer .
Camera Operator . Technical Crew . Digital Crew . Electricians . Riggers . Plumbers . Pyrotechnic
Engineers . Mechanical Engineers . Electrical Engineers

ARTIST

Actor . Costume Design . Opera Singers . DJs . Musicians . Piano Tuners . Hospitality

MANAGEMENT

Production Manager . Venue Manager . Tour Manager . Artist Manager . Agent
Booker . Producer

HEALTH & SAFETY

Event Control . Fire Consultant . Medics . Risk Management . Safety . Security . Stewards
Waste Management and Cleaning Services

SME SUPPLIERS

Directors and Managing Directors of SMEs supplying labour and equipment to the Live Entertainment Sector

VENUE STAFF

Designers . Carpenters . Engineers . Merchandiser . Set Design & Build . Ushers . Stewards



CONTRIBUTION

Funds devoted to keeping the Events and Arts sectors intact, are an investment. Every €1 spent in the sector results in over €6 being added to the economy.

The Event and Arts industry is worth €1.3 Billion to the Republic of Ireland each year, and €1.7 Billion to the whole island of Ireland each year. This is a thriving viable industry, which must be protected for the time it is prevented from working by the protocols to keep Ireland safe.

In 2017, the Live Entertainment sector was directly responsible for the creation of 3.2 Million bednights. The benefit to the hotel, restaurant and licensed vintner sectors from Live Entertainment is huge. These sectors will suffer greatly should the Live Entertainment Sector not return to full capacity as soon as is possible.

The Live Entertainment Sector from small village fairs through theatre, live concerts and large scale outdoor shows and festivals are an integral part of the fabric of society in Ireland. They are a key component to life, to happiness and to mental health.

Live Entertainment supports people, it supports other sectors, it is engrained in society both visibly through events and behind the scenes with the SMEs and staff spread throughout our communities.

Live Entertainment is the creation of memories, the creation of joy with an added bonus of the creation of large funds via tax and spend in to the exchequer.


A photograph of the Electric Picnic festival stage at night. The stage is illuminated with bright purple and blue lights. A large, arched structure with the words "Electric Picnic" in a cursive, neon-like font is visible in the background. The stage is filled with musicians and instruments, though they are somewhat obscured by the lighting and distance.

Electric Picnic

SNAPSHOT ELECTRIC PICNIC

ELECTRIC PICNIC DATA GATHERED IN 2016

- €6.5M Value to Stradbally Village
- €16M Value to Stradbally Area
- €20M Value to Co. Laois
- €25M Value to Leinster
- €36M Value to Ireland
- Festival goers spend €26M on site, locally & regionally
- Electric Picnic spend €10M on local contractors & suppliers



SNAPSHOT INDIEPENDENCE

INDIEPENDENCE DATA VALID TO 2018

- €1.5M Value to Mitchelstown (Pop. ~4,500)
- €2.0M Value to Mitchelstown Area
- Every available bednight is filled as far north as Clonmel and as far south as Cork City. This is true for an extended period of time prior and post event with staff filling these rooms.
- Mitchelstown Business Association describes INDIEPENDENCE as “The same as Christmas” with regards to local spend.
- INDIEPENDENCE spends in excess of €500,000 annually in the locality on rents, accommodation, food & beverage and through employing a number of local SMEs as part of the build of the event.
- In the last ten years INDIEPENDENCE has donated in excess of €100,000 to local charities and sports clubs.

SNAPSHOT

THE BUSINESS & THE SMEs

SCC19R-R-0360(i) D



THESE ARE THE TYPES OF SMEs THAT ARE REPRESENTED BY EPIC. THERE ARE BUSINESSES LIKE THESE ONES IN ALMOST EVERY TOWN AND CITY IN IRELAND.

EVENT POWER - THURLES

STAFF: 14 FULL, 16 SEASONAL

TURNOVER FROM EVENTS: 100%

RYANS CLEANERS - TIPPERARY

STAFF: 46 FULL, 250 SEASONAL

TURNOVER FROM EVENTS: 100%

DONOHUE MARQUEES - CARLOW

STAFF: 20 FULL, 25 SEASONAL

TURNOVER FROM EVENTS: 90%

MONGEY COMMUNICATIONS - NAAS

STAFF: 30 FULL, 60 SEASONAL

TURNOVER FROM EVENTS: 50%

MARATHON COACHES - DUBLIN

STAFF: 8 FULL, 8 SEASONAL

TURNOVER FROM EVENTS: 30%

SHIELDS STAGING - CORK

STAFF: 4 FULL, 16 SEASONAL

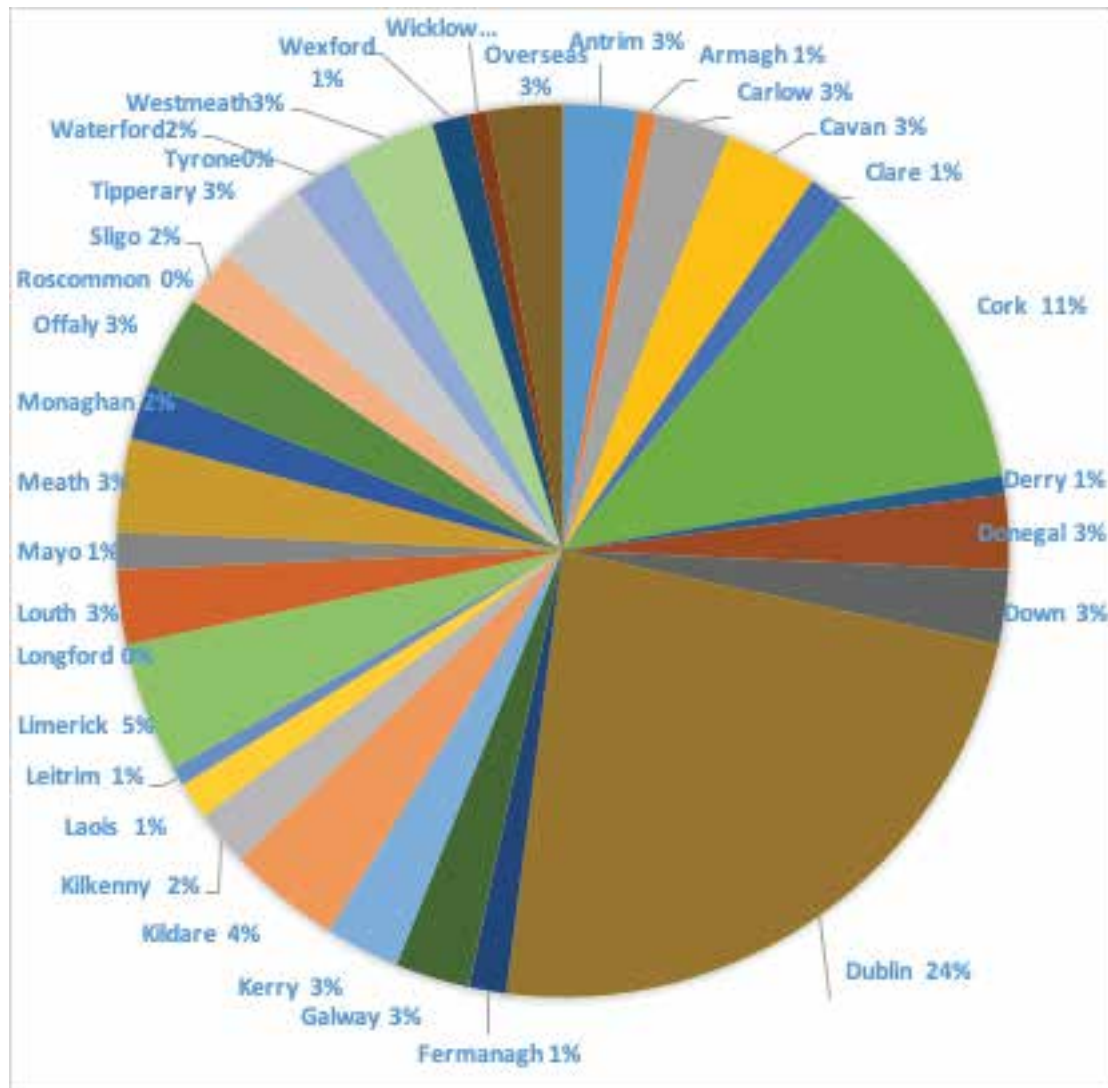
TURNOVER FROM EVENTS: 100%

SCC19R-R-0360(i) D

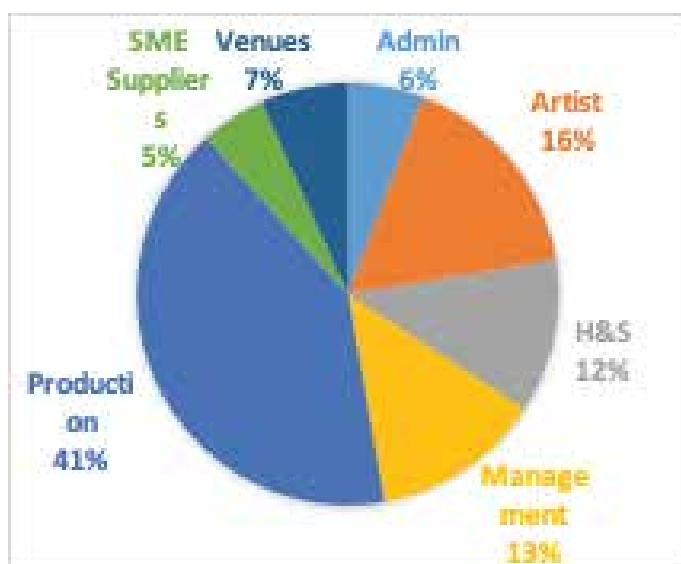
SNAPSHOT - EPIC WORKING GROUP CENSUS

2,000+ RESPONDENTS

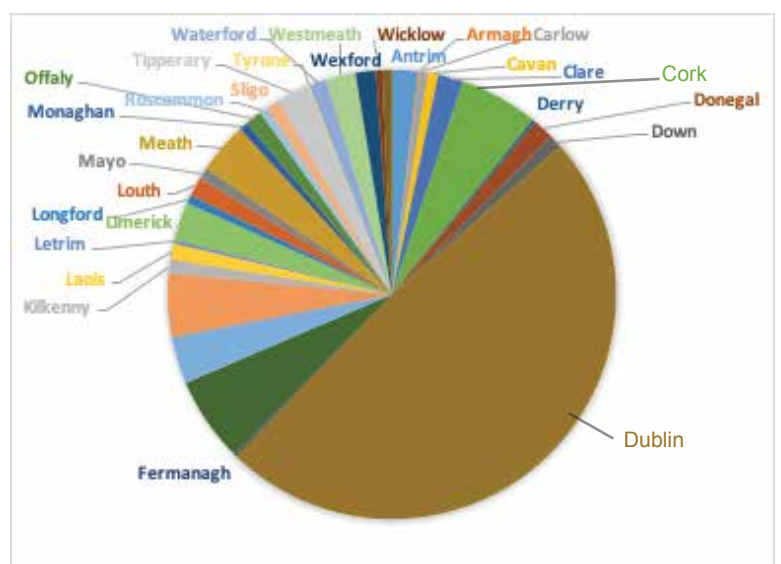
SMEs | SOLE TRADERS | PRODUCTION STAFF



GEOGRAPHICAL SPREAD OF SMEs (EPIC CENSUS)



SECTORAL SPREAD EPIC MEMBERS



GEOGRAPHICAL SPREAD EPIC MEMBERS

IN CONCLUSION



This is an industry of entrepreneurs, a business filled with people who have forged their own path, highly skilled and dedicated people who invest their own time and their own money to create; to create events and experiences, to allow others to make memories that will last a lifetime.

The Live Entertainment Industry is a business of innovators and we will innovate again, we will move, we will adapt, we will create and we will return.

This is an industry that doesn't receive funding, we are commercial entities and we are successful at it. This was a thriving industry prior to Covid and it will be again. We don't want a hand out, we just need a hand up until it is safe for our industry to return to full capacity again.

We hope that you will take on board and make reality the practical requests within this document to aid with the support and recovery of the Live Entertainment Sector in Ireland.

THANK YOU



APPENDIX

I. AIST COVID-19 IMPACT SURVEY

II. LET'S CELEBRATE REPORT 2017

III. THEATRE FORUM LETTER OF SUPPORT



AIST COVID-19 IMPACT SURVEY

COVID19 Impact Survey

Detailed Results

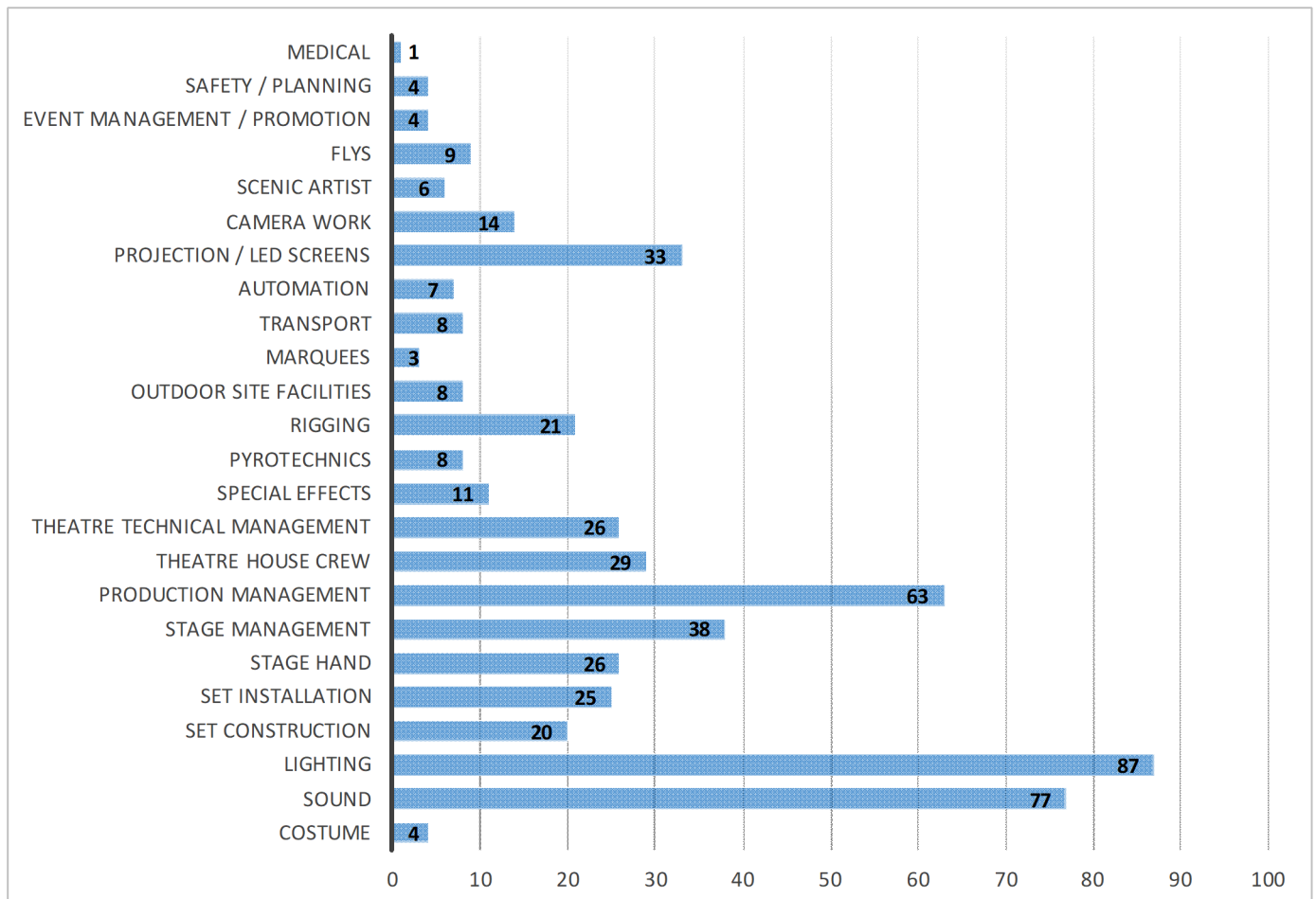
The Association of Irish Stage Technicians undertook to survey the non-performance staff and the businesses across the Arts, Entertainment, and Event Industry. The survey ran from the 8th to the 19th of April 2020, to assess the impact of the Covid19 pandemic and the ensuing restrictions, on the workers and companies in the industry, both members and non-members. The survey had 212 respondents. Some points of note are:

- 92% of Incomes affected by mass gatherings ban.
- 62% of workers have retained zero income.
- 54% of companies have laid off all staff.
- A further 20% of companies have laid off between 90% and 50% of staff.
- 72% of company directors not drawing wages.
- 17% of companies consider they are unlikely to be trading next year.
- 70% of arts and event workers claiming Covid19 payment.
- 25% of companies consider they are trading on a day to day basis.
- 8 in 10 of respondents report that less than 30% of cancelled work has been rescheduled.
- 40% of companies requiring financial support to continue trading.

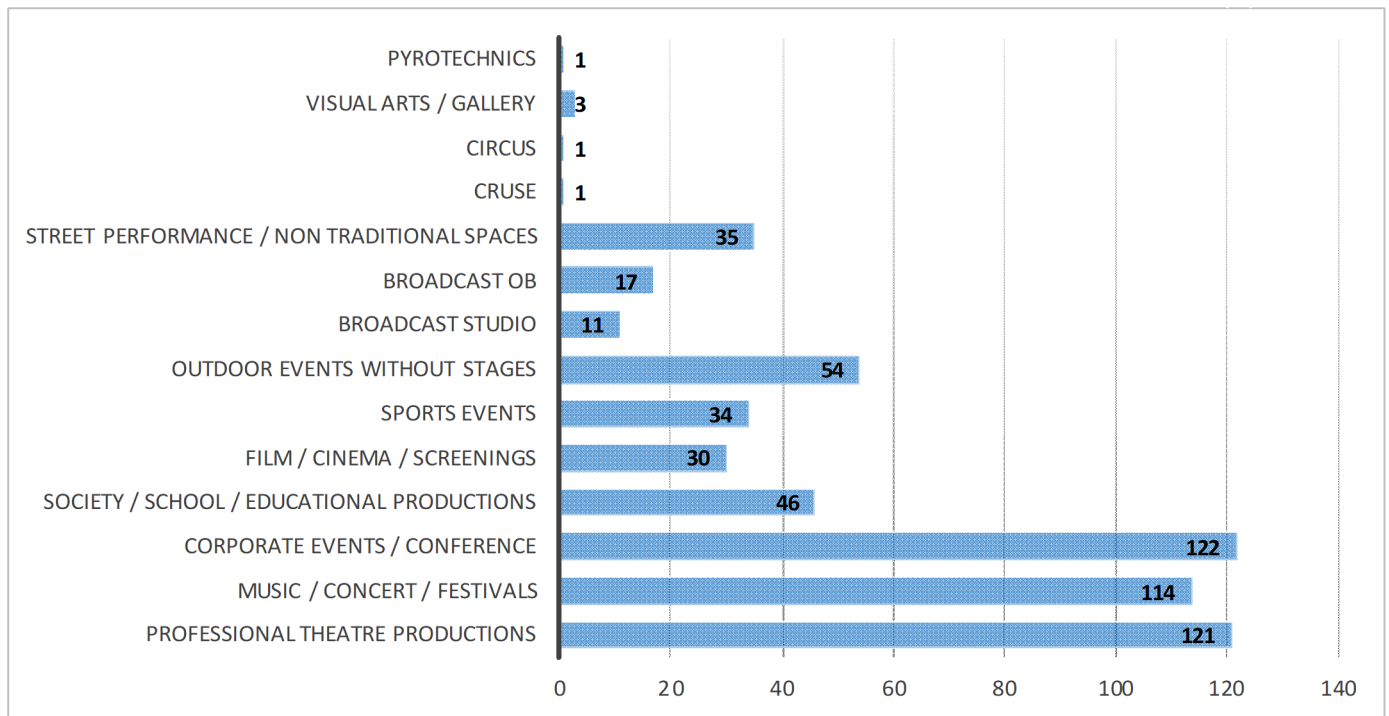
1. Name or Company Name:

These results have been removed during anonymization. This data was only collected to prevent duplication.

1a. What areas do you work in?

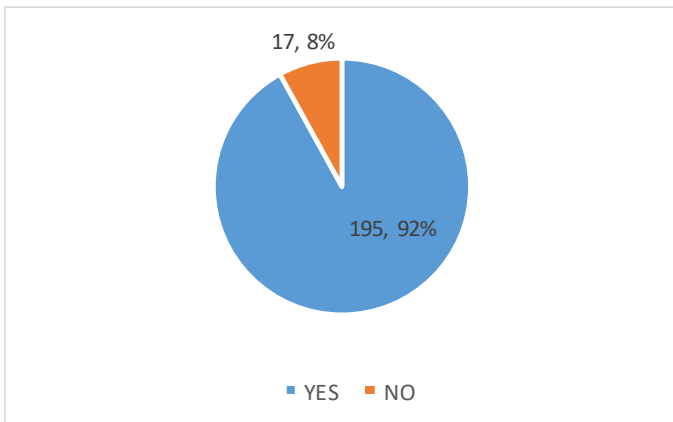


1b. What sectors do you work in?



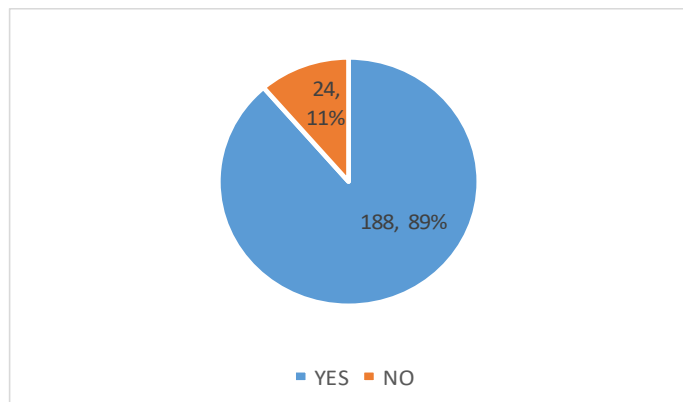
SECTION ONE: Questions relating to the impact from March 12th when the Mass Gatherings Ban commenced, until the date of the survey (survey closed 19th April).

2. Has your income been affected by the Covid19 ban on public gatherings?



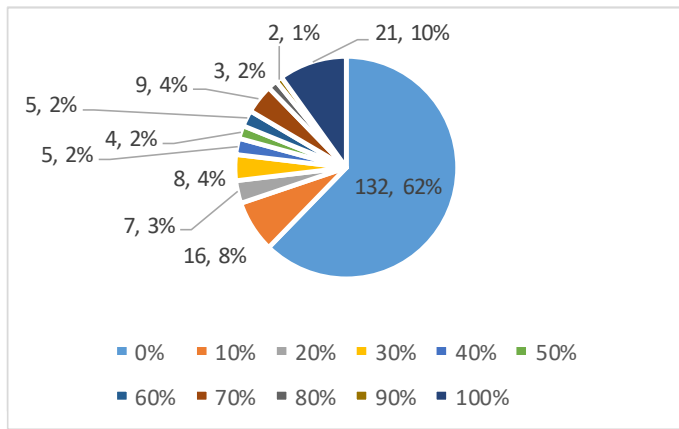
	%	Numeric
YES	92%	195
NO	8%	17

3. Has your income been affected by the Covid19 closure of non-essential places of work?



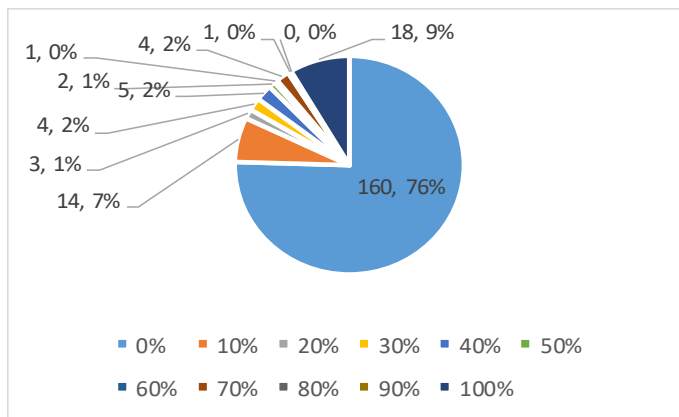
	%	Numeric
YES	89%	188
NO	11%	24

4. What percentage of your normal income have you RETAINED since the public gathering restrictions were implemented?



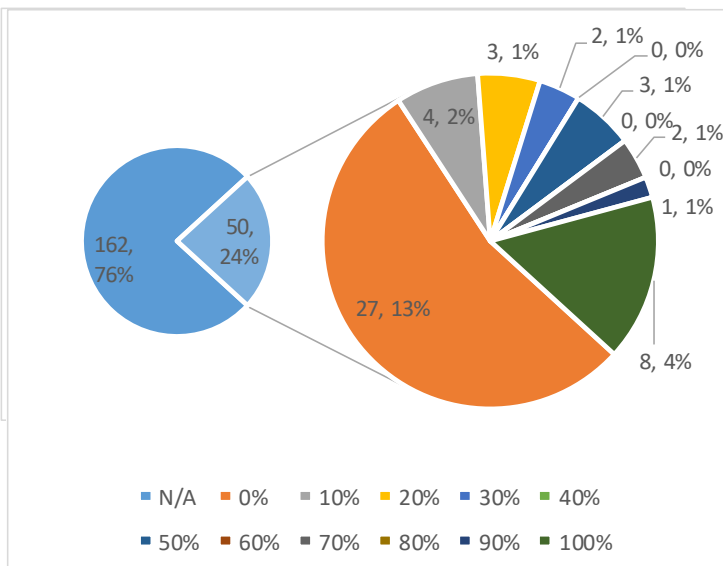
Income	%	Numeric
0 %	62%	132
10 %	8%	16
20 %	3%	7
30 %	4%	8
40 %	2%	5
50 %	2%	4
60 %	2%	5
70 %	4%	9
80 %	2%	3
90 %	1%	2
100 %	10%	21

5. If you have been able to RETAIN any paid work from home or online; what percentage of your normal monthly income has it been?



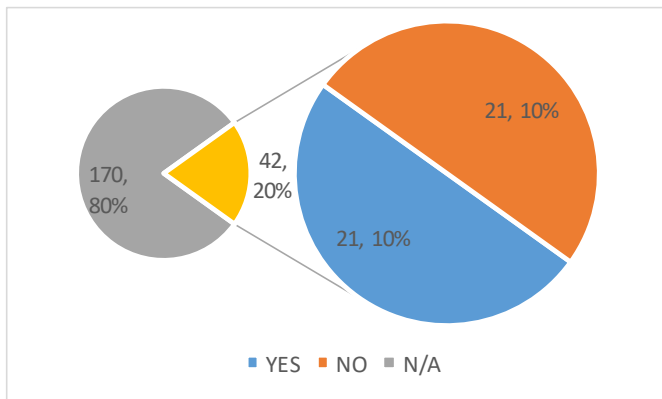
Income	%	Numeric
0 %	76%	160
10 %	7%	14
20 %	1%	3
30 %	2%	4
40 %	2%	5
50 %	1%	2
60 %	0%	1
70 %	2%	4
80 %	0%	1
90 %	0%	0
100 %	9%	18

6. If you employ staff, sub-contractors or casual labour; what percentage of staff have you RETAINED (not including working directors)?



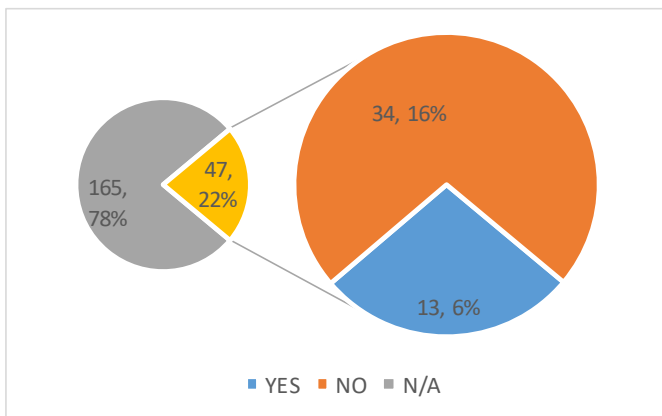
Income	%	Numeric
N/A	76%	162
0 %	13%	27
10 %	2%	4
20 %	1%	3
30 %	1%	2
40 %	0%	0
50 %	1%	3
60 %	0%	0
70 %	1%	2
80 %	0%	0
90 %	1%	1
100 %	4%	8

7. If you are a company, are you retaining staff using the Government tax credit system?



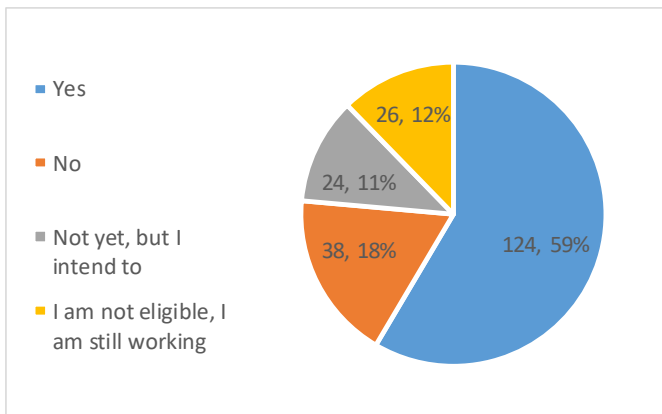
	%	Numeric
YES	10%	21
NO	10%	21
N/A	80%	170

8. If you are a working or non-working director of a company, are you drawing a wage at this time?



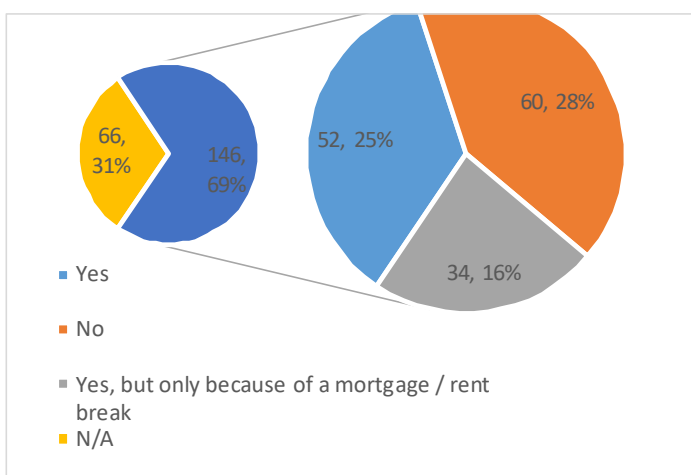
	%	Numeric
YES	6%	13
NO	16%	34
N/A	78%	165

9. Are you claiming the Social Welfare Emergency Covid19 Payment of €350 per week?



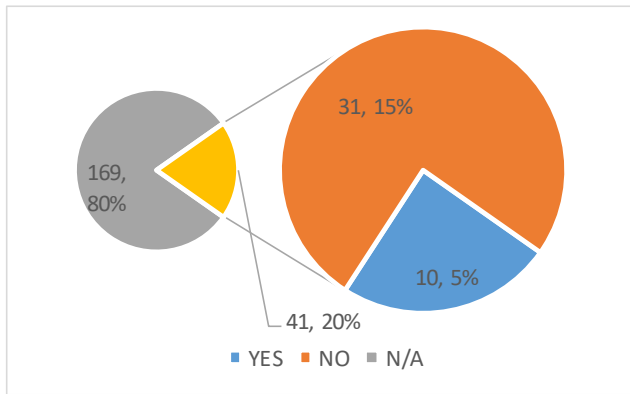
	%	Numeric
YES	59%	124
NO	18%	38
Not Yet, but I intend to	11%	24
I am not eligible, I am still working	12%	26

10. If you are claiming the payment, does it meet your minimum outgoings of mortgage/rent, utility bills and food?



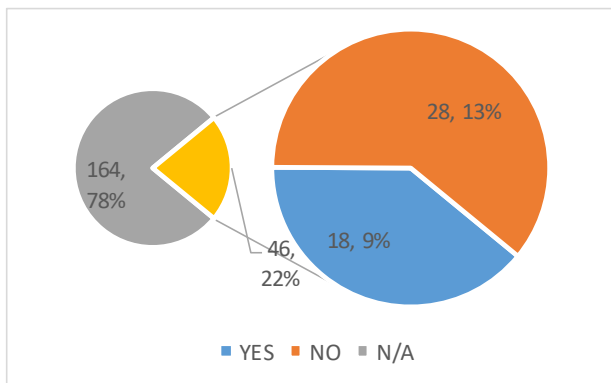
	%	Numeric
YES	25%	52
NO	28%	60
Yes, but only because of a mortgage / rent break	16%	34
N/A	31%	66

10.a If you are a company, have you required state aid of any sort to keep trading?



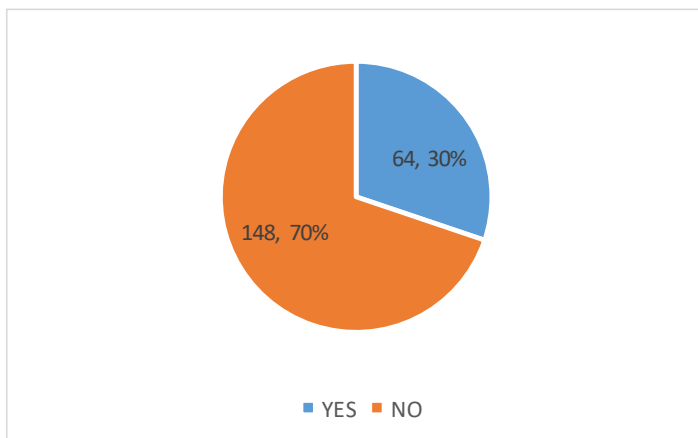
	%	Numeric
YES	5%	10
NO	15%	31
N/A	80%	169

10.b If you are a company, have you required financial support from your bank to keep trading?



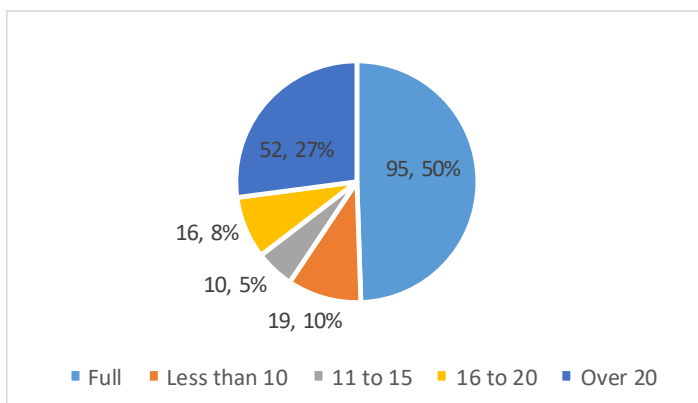
	%	Numeric
YES	9%	18
NO	13%	28
N/A	78%	164

11. Have you had to find work outside the wider entertainment / event industry to make ends meet?



	%	Numeric
YES	30%	64
NO	70%	148

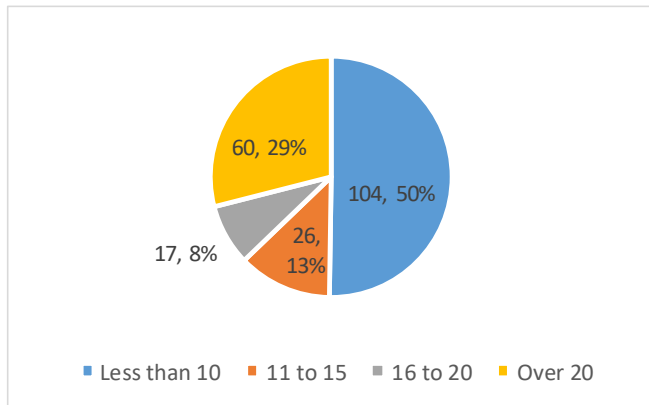
12. How many days work have you had cancelled since the restrictions began? (If you have ceased work of a full time position, please enter "full" instead of a number of days).



	%	Numeric
Full Time Job	50%	95
Less than 10	10%	19
11 to 15 days	5%	10
16 to 20 days	8%	16
More than 20	27%	52

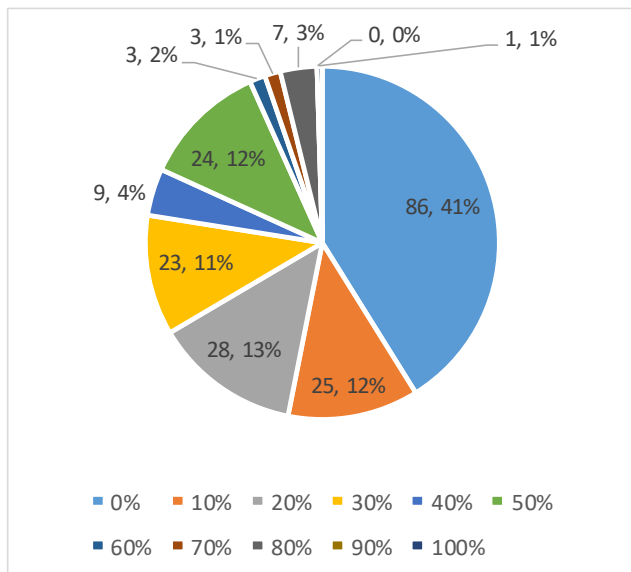
Note: Days lost out of 35 days since the restrictions began to the end of the survey.

13. How many separate events, which you were to work on, have been cancelled, since the restrictions began?



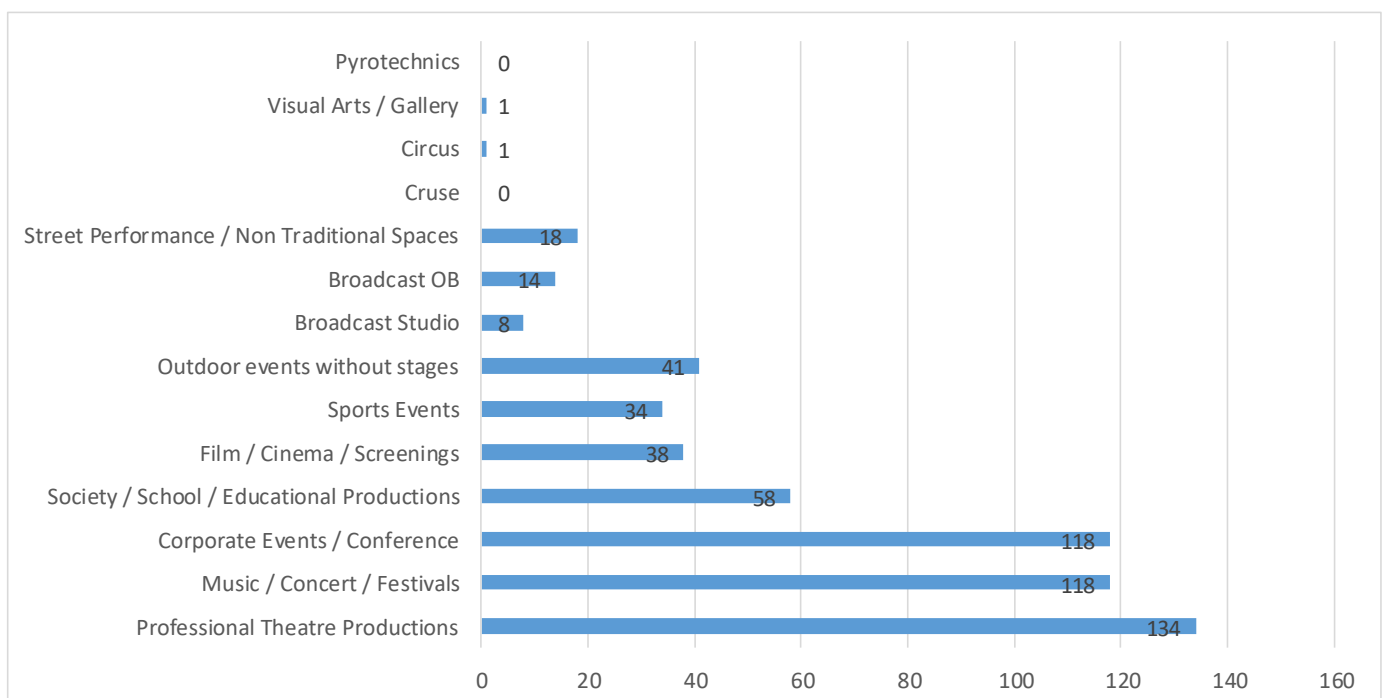
	%	Numeric
Less than 10	50%	104
11 to 15 Events	13%	26
16 to 20 Events	8%	17
Over 20 Events	29%	60

14. Of the above cancelled days work, what percentage have been confirmed to be rescheduled to a future date? (Don't include annual work which has been effectively cancelled outright by being postponed to the same time next year.)

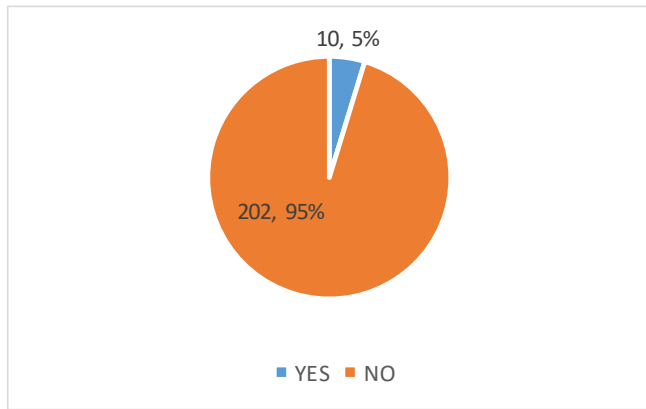


	%	Numeric
0%	41%	86
10%	12%	25
20%	13%	28
30%	11%	23
40%	4%	9
50%	12%	24
60%	2%	3
70%	1%	3
80%	3%	7
90%	0%	0
100%	1%	1

15. What categories below describe the cancelled work?



16. Have you had any work added directly as a result of the Covid19 Pandemic?

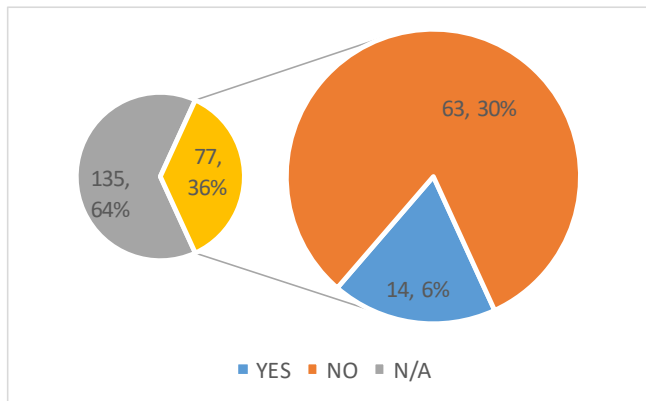


	%	Numeric
YES	5%	10
NO	95%	202

16.a If you have had work added please mention what type of work.

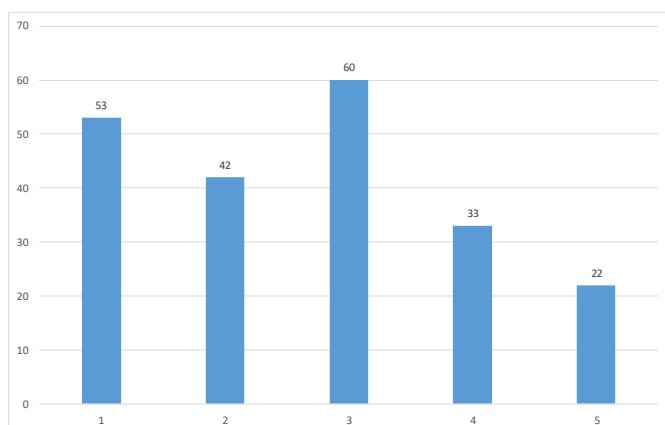
- Working on RTE's Ireland's Call and Operation Transformation.
- TV Programme
- Online Support
- IT support and remote teaching
- Video Streaming
- Small artistic commissions
- Temporary plumbing services for the HSE
- Facilities for HSE for temporary set up.
- Weddings, original suppliers not available for new dates.

17. Have you been prevented from accepting any work due to childcare facilities being closed?



	%	Numeric
YES	6%	14
NO	30%	63
N/A	64%	135

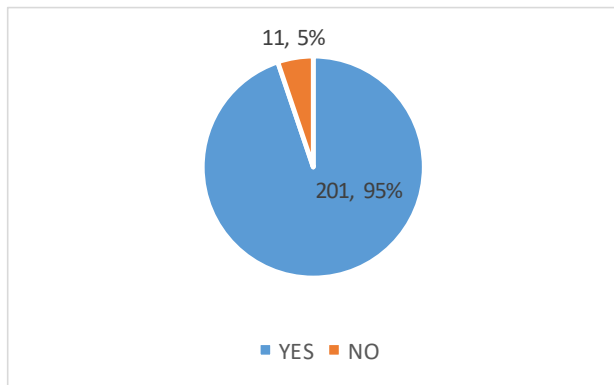
17.a On a scale of 1 to 5 how close have you or your company come to cease trading since the restrictions began?



	%	Numeric
1. Extremely Close	25%	53
2	20%	42
3	29%	60
4	16%	33
5. Will be fine	10%	22

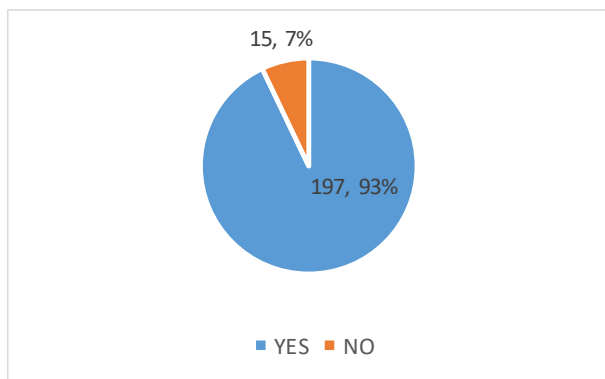
SECTION TWO: Questions relating to the future impact of the Mass Gatherings Ban from the dates of the survey onward.

18. Is your income going to be affected for the rest of the year by the Covid19 ban on public gatherings?



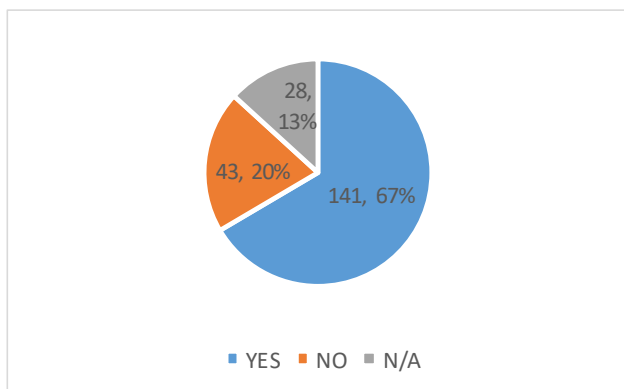
	%	Numeric
YES	95%	201
NO	5%	11

19. Is your income going to be affected for the rest of the year by the Covid19 closure of non-essential places of work?



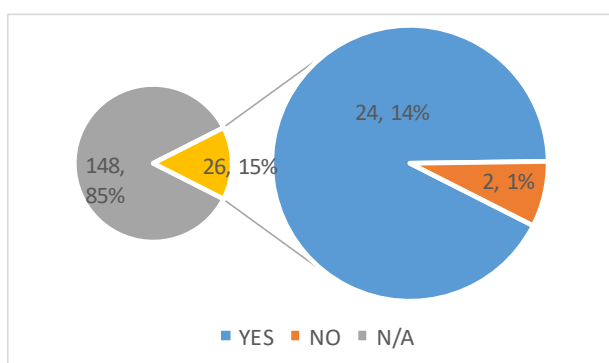
	%	Numeric
YES	93%	197
NO	7%	15

20. If you are an individual, do you envisage still being able to work in the wider entertainment / event industry by the end of the year?



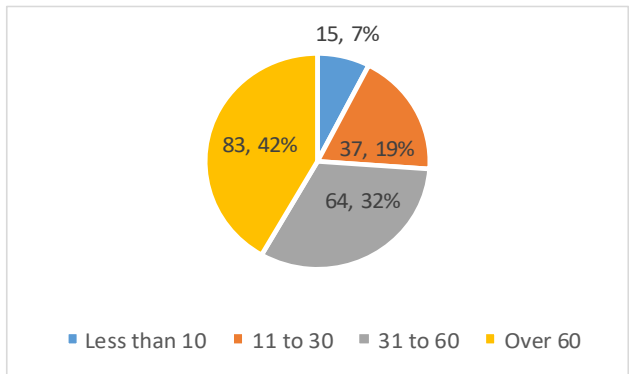
	%	Numeric
YES	67%	141
NO	20%	43
N/A	13%	11

21. If you are a company, do you envisage still being trading by the end of the year?



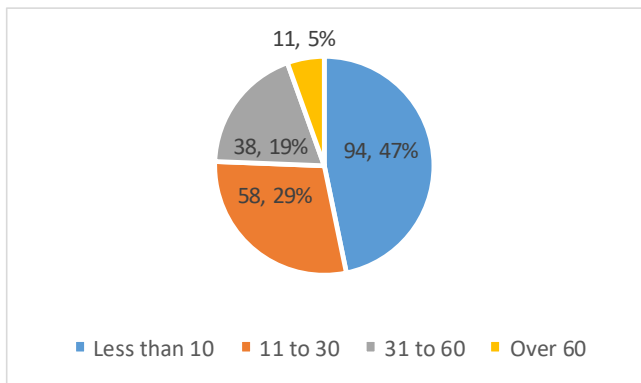
	%	Numeric
YES	14%	24
NO	1%	2
N/A	85%	148

22. How many future days work have you had cancelled? (Also include work you confidently expected to be booked for in the coming months.)



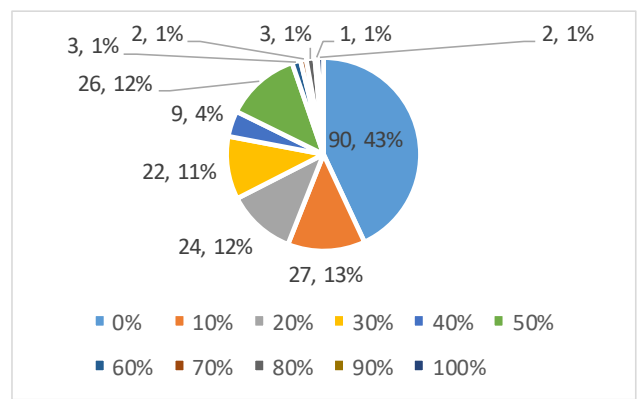
	%	Numeric
Less than 10 days	7%	15
11 to 30 days	19%	37
31 to 60 days	32%	64
Over 60 days cancelled	42%	83

23. How many future separate events have you had cancelled? (Also include work you confidently expected to be booked for in the coming months.)



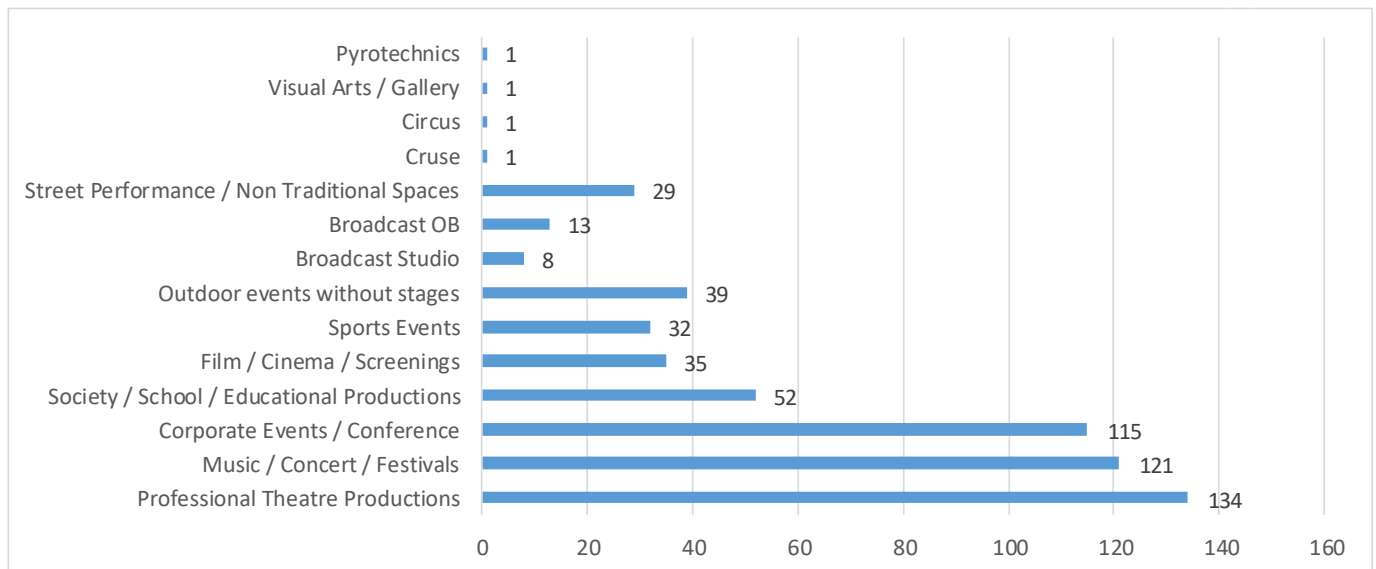
	%	Numeric
Less than 10 events	47%	94
11 to 30 events	29%	58
31 to 60 events	19%	38
Over 60 events	5%	11

24. Of the above cancelled days work, what percentage have been confirmed to be rescheduled to a future date? (Don't include annual work which has been effectively cancelled outright by being postponed to the same time next year.)

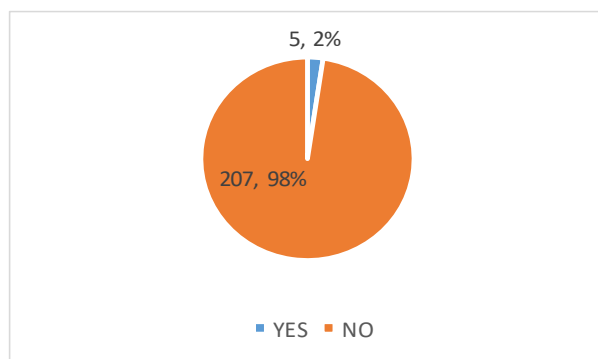


	%	Numeric
0%	43%	90
10%	13%	27
20%	12%	24
30%	11%	22
40%	4%	9
50%	12%	26
60%	1%	3
70%	1%	2
80%	1%	3
90%	1%	1
100%	1%	2

25. What categories below describe the cancelled work?



26. Have you had any future work added directly as a result of the Covid19 Pandemic?



	%	Numeric
YES	2%	5
NO	98%	207

26.a If you have had work added please mention what type of work.

- TV specials
- IT support and remote teaching
- Video Streaming
- Artistic commission
- HSE contract

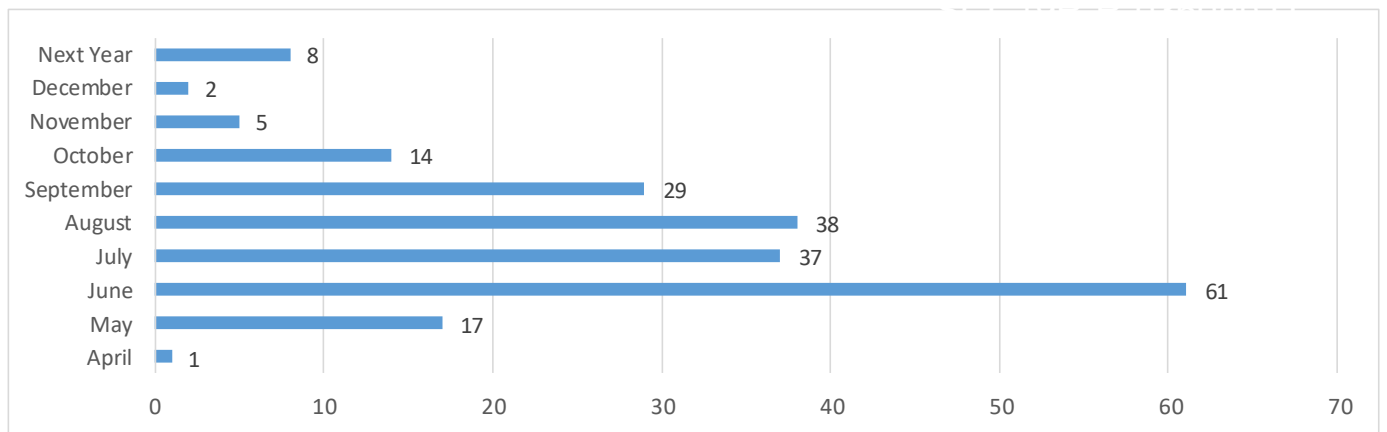
SECTION THREE: Questions attempting to ascertain the mood of the sector. Note survey dates 8th to 19th of April 2020.

26.b For each time frame below, how likely do you think you will still be trading as a company or still working in the entertainment / event industry, if the ban on mass gatherings is still in place?

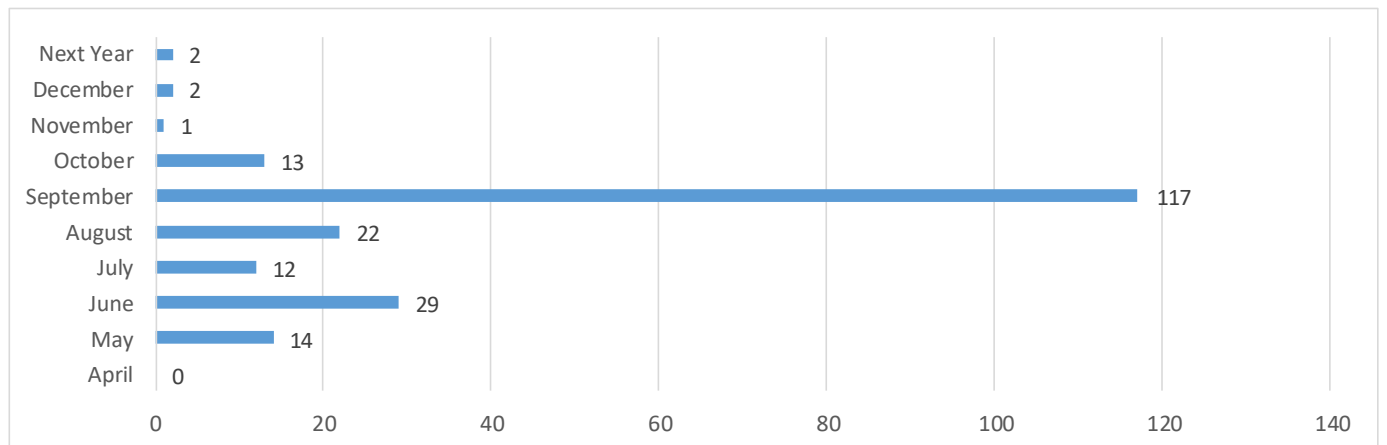
This question appears to have been interpreted in many different ways. The results are inconsistent and care should be taken when trying to draw inference based on the graph below.



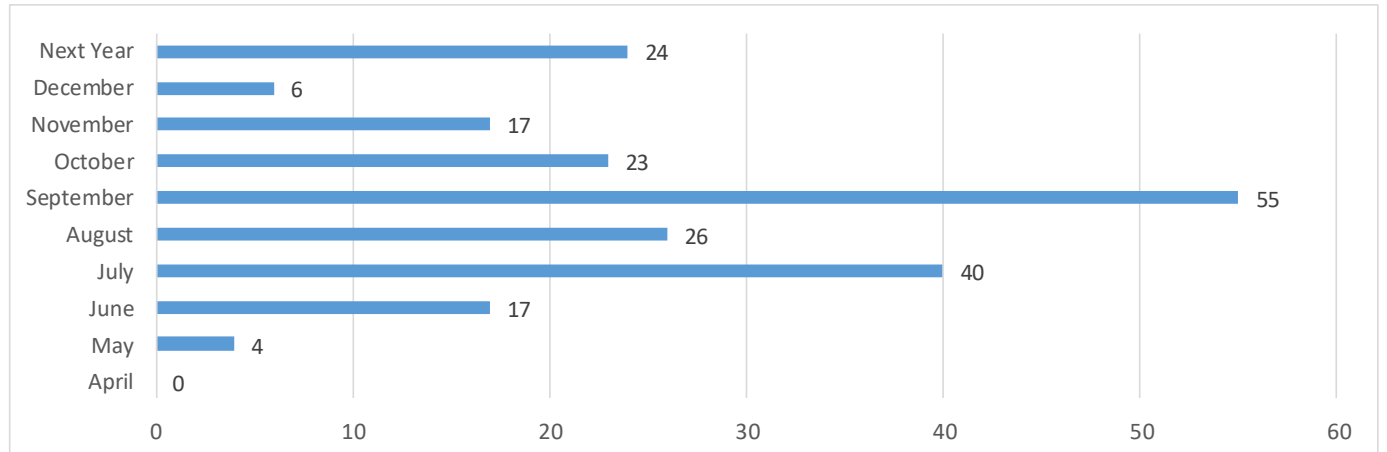
27. What month do you think non-essential places of work will reopen?



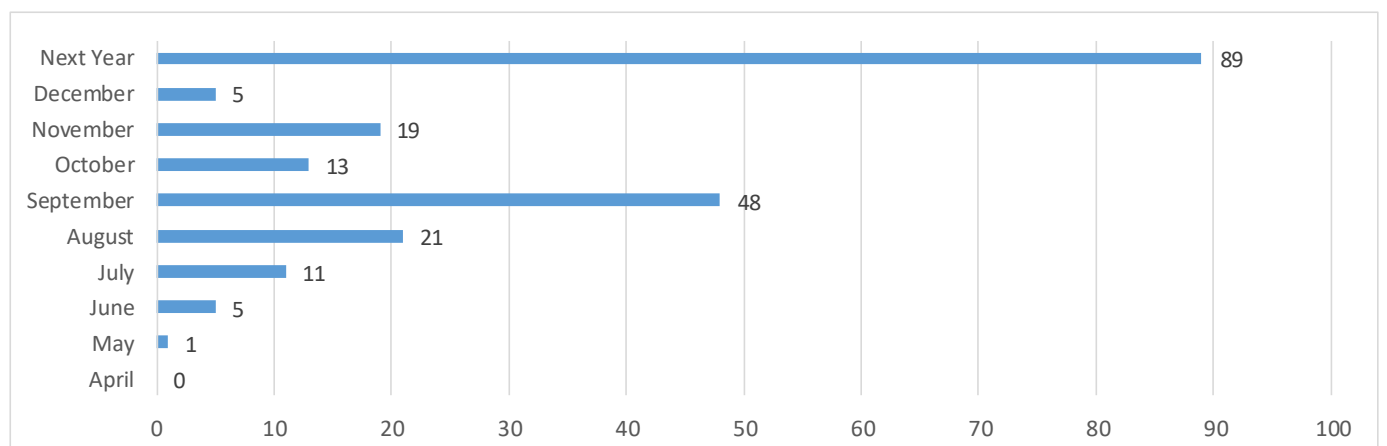
28. What month do you think places of education / childcare will reopen?



29. What month do you think mass gatherings of UNDER 1000 will resume?



30. What month do you think mass gatherings of OVER 1000 will resume?



31. Should you wish to add any personal experiences or other information, which you would like included in any submissions to relevant government bodies by the AIST; please add them below. (The AIST can't guarantee to include all information, but will use a representative sample).

Below is a representative sample of comments entered by respondents.

- more on line training and development for entertainment staff while our work is affected
- Because I am over 66 I don't qualify for Covid 19 payment. Because I am a contract worker I don't qualify for my employer paying 70%
- I am a part time employee of the public sector so have been redeployed to assist with Covid 19 operations. I therefore have kept my wage. I have lost all of my supplemental work such as production managing a festival, renting audio equipment to several tours and some training work planned for the summer. It being the city of culture there would have no doubt been huge amounts of freelance work as yet unannounced in the city. In the 45 days the ECOC was running I had already worked approx. 6 days freelance.
- The arts never came out of recession as far as artists like me are concerned. We should be treated the same as any other industry in terms of commitment, representation and funding. You cannot expect artists to help a nation cope and deal with our national consciousness if we do not fund them appropriately to survive this crisis and then also to survive outside this crisis.
- Government help for businesses is just loans. They offer no payments for six months but I can't commit to any loan with no prospects of earnings. I'm giving up my workshop as I have no means to pay the rent, business rates, water rates, business insurance and public liability insurance, buildings insurance, electricity, tools and workshop upkeep and repairs.
- Roll out of support funds for the arts freelance as well as organisations is paramount to Ireland's culture and national well being
- There is clarity from the arts council regarding payment of 'artists' for gigs which have been funded and scheduled but cancelled. There is no clarity regarding paying 'arts workers' (freelance theatre technicians). Different companies are interpreting the arts council advice in different ways. Some companies are holding on to their funding and 'postponing' gigs. This is creating an income void. We are (although a substantial sub sector of the arts industry) underrepresented at arts council level whilst being indirectly dependent on arts council funding.
- I have taken up another job outside the industry in the time since Covid-19 cancellations began. I am very grateful to have been offered this opportunity. My experience of event cancellations has been disheartening and has highlighted the lack of support for individuals within some companies/in some circles within the live events industry. I hope to be able to strike a balance between my new, non-industry job and events work whenever events come back around, but I feel heavy hearted when I consider what would happen if schedule clashes would disallow me to continue both. The lack of security for events workers in Ireland is startling, and my gratitude for the non-industry job is bittersweet, as my true passion is events work, but this new job has opened my eyes to a much level of security, better conditions and, broadly speaking, much better treatment at work. This is not just because working in an office is more comfortable than working in a field... the precedent of communication with workers (be they freelancers or employees) and fair consideration of the impact of x y and z on individuals could happen in events too, but the majority of my experience has not been the case. It could be speculated that the lack of a communication culture is a side effect of the lack of workable funding and government support to the industry. Rarely have I had the sense that a PM or company has been intentionally dismissive of individual welfare. The general feeling is that production managers and those involved in the wonderful work of making events happen in the first place are under so much pressure themselves that there is no capacity to add human centred communications to their workload. I am both saddened and grateful to have left the industry for the foreseeable future at this point in time. I fear greatly for the wellbeing of my colleagues who have had no such opportunity.
- I'm working as a house engineer in a club, so with the club closed I've no other work. With larger gatherings eliminated, I can't even look for crew work.



LET'S CELEBRATE REPORT 2017

Let's *Celebrate*²⁰¹⁷

The Cultural and Economic
Contribution of Live Entertainment
Events in Ireland





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

Mary Davis, Global CEO, Special Olympics International



SCC19R-R-0360(ii) D
The cultural impact of live entertainment is unique in that it not only allows for audiences to witness the craft of all those bringing art and culture to life but, more importantly, brings audiences together to discuss and mediate what has unfolded before them."

Moya Doherty, Riverdance Producer & Chairperson of the RTE Board



Croke Park
Photo credit: Paulo Goncalves



Riverdance, Croke Park
Photo credit: Tyrone Productions



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

Robbie Williams



Robbie Williams, Aviva Stadium
Photo credit: Paulo Goncalves



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

Economics and survey research by: BOP Consulting
Designed by: Ollie McGhie
Produced & Published by:
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Executive Summary

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

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

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

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

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

A special message from

Michael Bublé...

to Let's **Celebrate**

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



Michael Bublé

Photo credit: Patrick O'Leary

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

Introduction

“Justin!... JustIN!...JUSTIN!”

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



Taylor Swift, 3Arena
Photo credit: Kathrin Baumbach

(cont. overleaf)

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

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

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

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

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

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



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



Slash
Photo credit: Paulo Goncalves

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

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

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

Author & Creator,

Justin Green
Wide Awake Communications

In Partnership with



Fáilte Ireland
National Tourism Development Authority



Wide Awake Communications

ticketmaster®

imro

Welcome...

the 'Let's *Celebrate*' Project

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

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

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

Denis Desmond, MCD Productions

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

Anne Clarke, Producer Landmark Productions

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

Michael O'Leary, Ryanair CEO



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



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

Foreword



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

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

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

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

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

Paul McGuinness



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

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

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

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

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

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



What is the first thing you associate with Ireland?

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

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

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

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

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

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

Niall Stokes, Founder and Editor, Hot Press



Longitude, Marlay Park
Photo credit: Paulo Goncalves

LET'S CELEBRATE

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

Ian Talbot, CEO, Chambers Ireland

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

Mark Rowlette, Fáilte Ireland



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

Louis Walsh, The X Factor

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

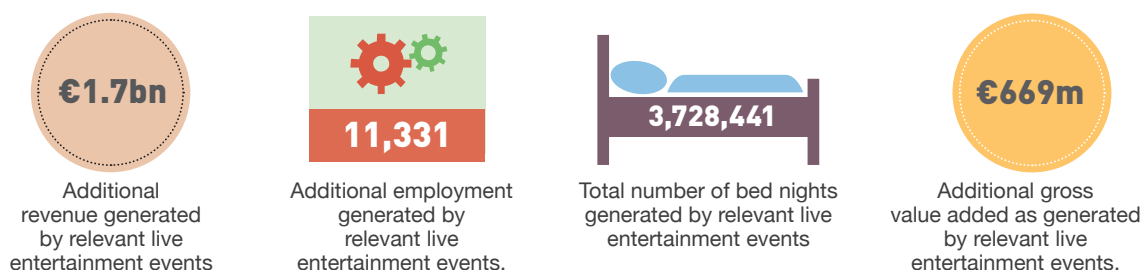
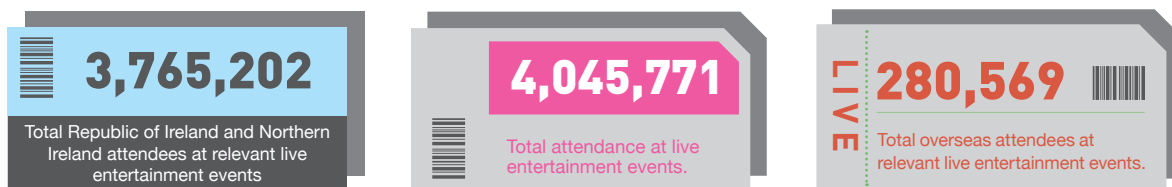
Simon Cowell, The X Factor

THE FACTS

Live Entertainment in Numbers

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

For events held on the entire Island of Ireland



For events held in the Republic of Ireland only



Top 30 Grossing Events

768,453 tickets Box office = €66m.

Propensity to attend Live Music by Geography

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



SPOTLIGHT:

DUBLIN CITY



U2, 3Arena

Photo credit: Kathrin Baumbach/ Hot Press

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

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

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

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

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

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

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

Mike Adamson, CEO Live Nation Ireland

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




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

FACT Over 4 million tickets sold

Total Attendees at Live Entertainment Events

held in the Republic of Ireland and Northern Ireland

(Republic of Ireland, Northern Ireland & Overseas Attendees)

BREAKDOWN			
	=		+
Republic of Ireland		Dublin	Rest of Republic
Events			Northern Ireland
MUSIC			
			
2,262,090 Attendees	1,861,856 Attendees	400,234 Attendees	473,719 Attendees
ARTS, THEATRE & COMEDY			
			
860,946 Attendees	821,559 Attendees	39,387 Attendees	61,675 Attendees
FAMILY, ATTRACTIONS & EXHIBITIONS			
			
293,375 Attendees	289,239 Attendees	4,136 Attendees	93,966 Attendees
TOTAL	3,416,411 Attendees	629,360 Attendees	

SPOTLIGHT:

DUBLIN COUNTY

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

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

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

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

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

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

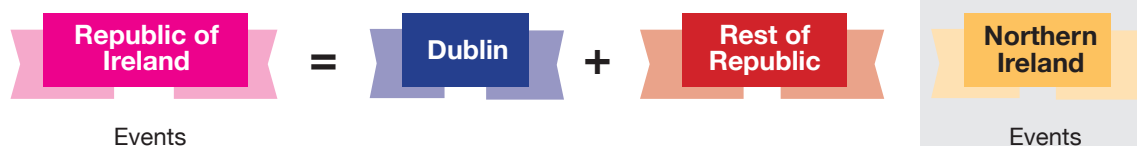
“ Since 2001, the €6.5m revenue generated directly from the Marlay concerts has enabled our Council develop its network of 30 children's playgrounds and various other park works as well as creating a sustainable funding model for our freely accessible park events programme enjoyed by local communities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

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

FACT Over 3.7 million
Irish customers

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

BREAKDOWN



MUSIC



2,141,172
Attendees



1,767,717
Attendees



373,455
Attendees



419,744
Attendees

ARTS, THEATRE & COMEDY



766,763
Attendees



732,886
Attendees



33,877
Attendees



58,613
Attendees

FAMILY, ATTRACTIONS & EXHIBITIONS



285,090
Attendees



282,689
Attendees



2,401
Attendees



93,819
Attendees

TOTAL

3,193,025
Attendees

572,176
Attendees



SPOTLIGHT:

NORTH EAST REGION

▲ Foo Fighters, Slane Castle
Photo credit: Paulo Goncalves

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

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

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

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

Lord Henry Mountcharles, Slane Castle

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

**Laura Whitmore,
International Television Broadcaster**

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

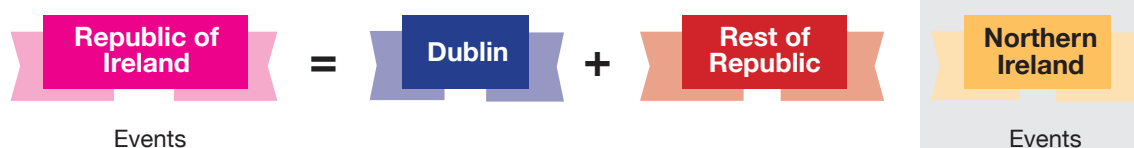
Michael Flatley



Additional Revenue from Live Entertainment Events (€m)

(See page 29 for Sources of Additional Direct Revenue)

BREAKDOWN



MUSIC



€900m



€699m



€200m



€326m

ARTS, THEATRE & COMEDY



€300m



€281m



€19m



€38m

FAMILY, ATTRACTIONS & EXHIBITIONS



€61m



€60m



€1m



€34m

TOTAL €1,261m

€398m



SPOTLIGHT:

SOUTH EAST REGION

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



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

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

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



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

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













Marty Whelan, National Broadcaster RTE Lyric FM



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

John Flynn, The Flynn Hotel Group

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

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

SPOTLIGHT:

SOUTHERN REGION

Van Morrison
Photo credit: Kathrin Baumbach/ Hot Press

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

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

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

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

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

Peter Aiken, Aiken Promotions







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

Lord Mayor of Cork Cllr. Des Cahill

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


Larry Gogan, National Broadcaster, RTE

Additional Employment from Live Entertainment Events

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

SPOTLIGHT:

MIDLANDS REGION

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

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

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

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

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

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

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

**Melvin Benn,
Managing Director Festival Republic**

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

Bren Berry, Aiken Promotions

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

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



Audience Insights & Profiles

Results of 5,764 Customer Research Data

Importance, Quality & Recommendations

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



SPOTLIGHT:

SOUTH WEST REGION

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

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

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

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



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

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

Joanna Keane, daughter of John B. Keane



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

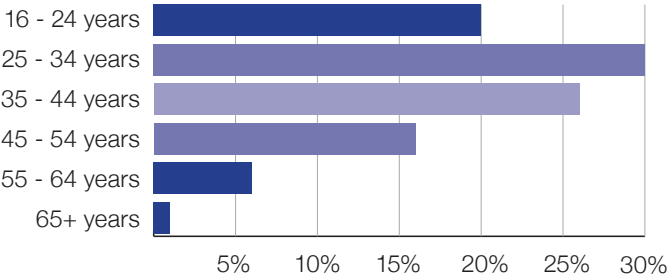
Garry Hynes, Artistic Director Druid Theatre



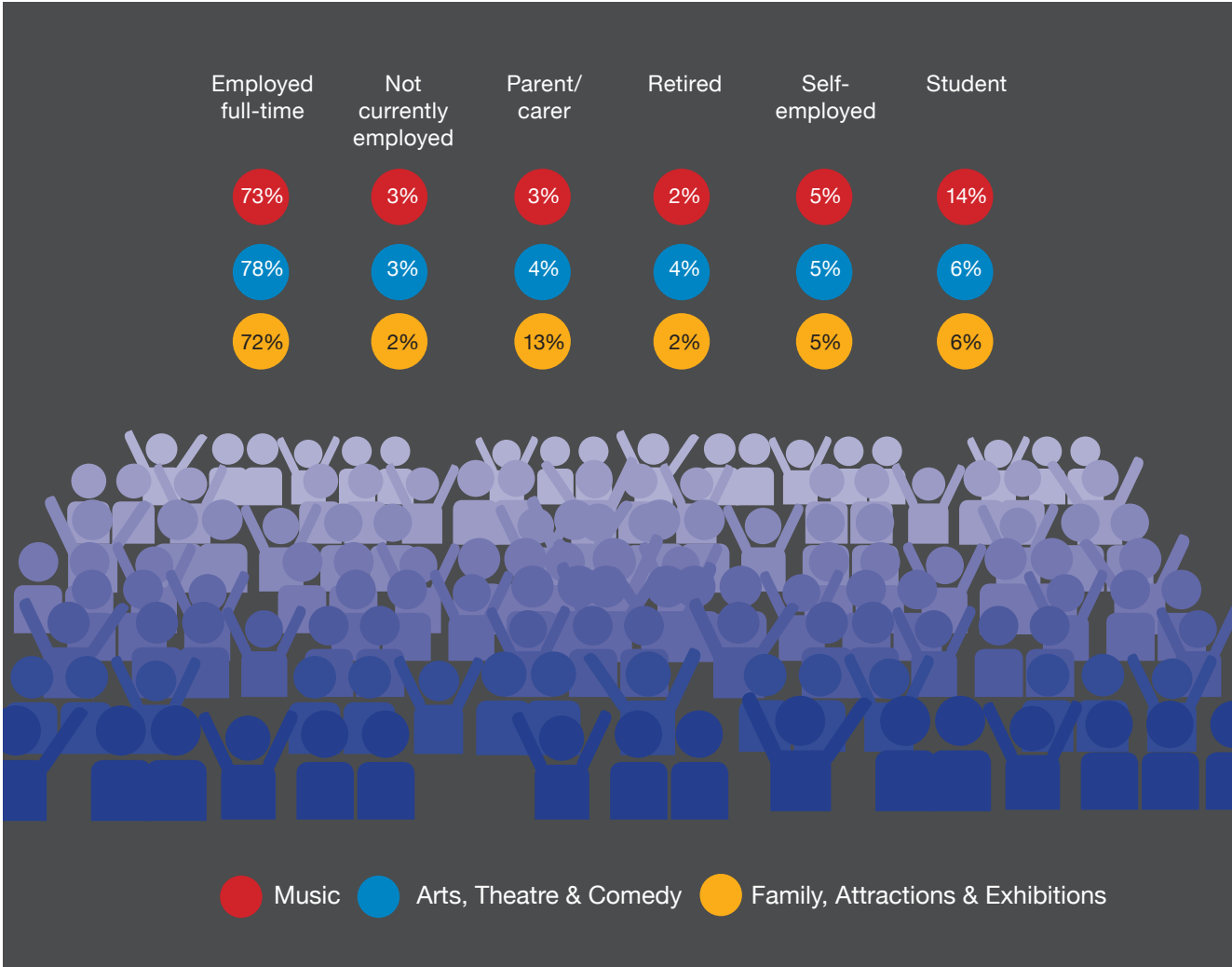
Age and Status

Profile of Attendees

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



Status of Attendees



SPOTLIGHT:

WEST REGION

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

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

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

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

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

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

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

John Crumlish, Chief Executive of the Galway International Arts Festival

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

Joe Dolan, President of the Irish Hotels Federation

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

Ryan Tubridy, National Radio & Television Broadcaster

FACT Over 3.7 million
Bed Nights Generated

Number of Bed Nights, Distance Travelled & Time Spent

Total number of bed
nights generated across
the Island of Ireland

3,728,441



Music
2,915,797



Arts, Theatre and Comedy
530,942



Family, Attractions and Exhibitions
281,702

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



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

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



SPOTLIGHT:

NORTH WEST REGION



Daniel O'Donnell

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

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

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

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



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

Daniel O'Donnell, Singer



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

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

FACT€749 million Spent
in Additional Direct
Revenue Alone

Customer Insights & Economic Benefits

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

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

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

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

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

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

TOTAL

€623m

€126m

FACT

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



SPOTLIGHT:

NORTHERN IRELAND



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

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

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

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

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



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

Brendan O'Carroll, Mrs. Browns Boys



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

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



Republic of Ireland and Overseas Tourists lost to Northern Ireland

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

Music = 53,975

Arts, Theatre &
Comedy = 3,062

Family, Attractions
& Exhibitions = 147

**From Rest of
Republic of
Ireland:**

Music = 16,191

Arts, Theatre &
Comedy = 1,694

Family, Attractions
& Exhibitions =
2,560



From Dublin:

Music = 5,568

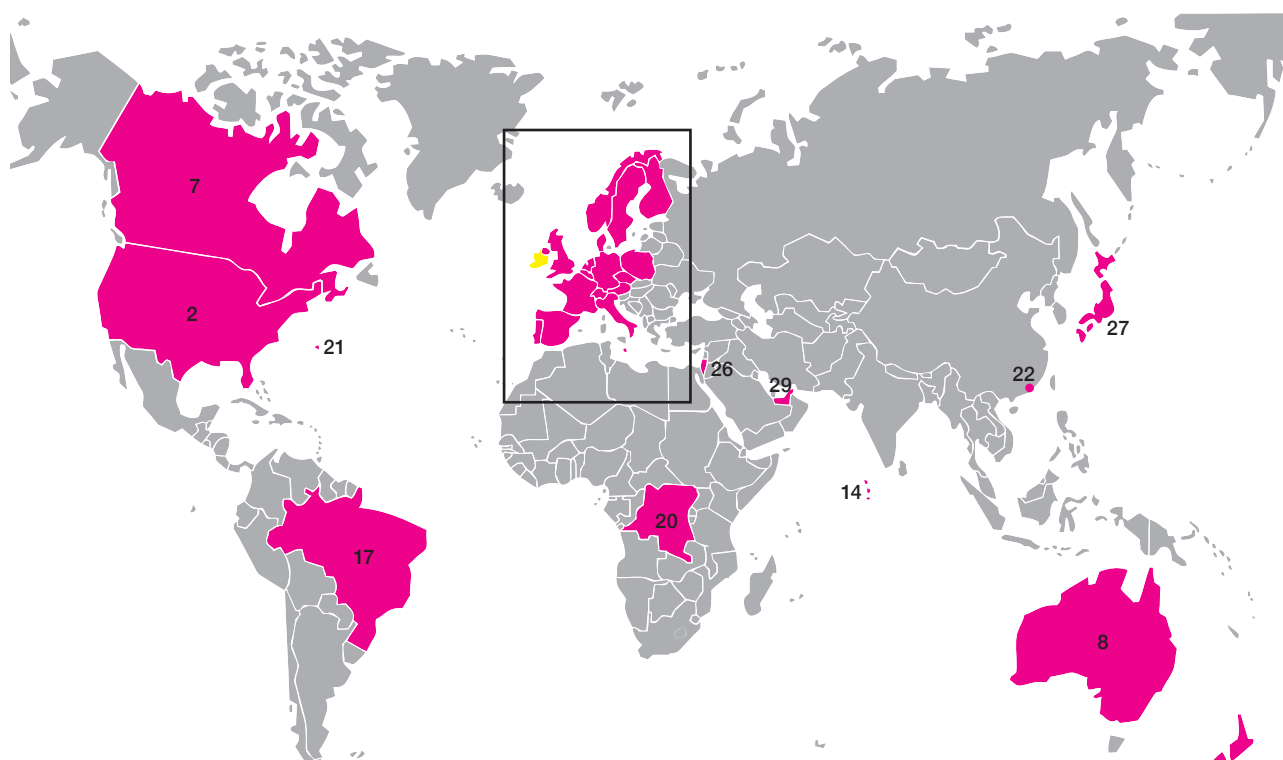
Arts, Theatre &
Comedy = 252

Family, Attractions
& Exhibitions = 152

Total: 83,601 attendees lost to Northern Ireland

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

Origin and Numbers of Overseas Tourists



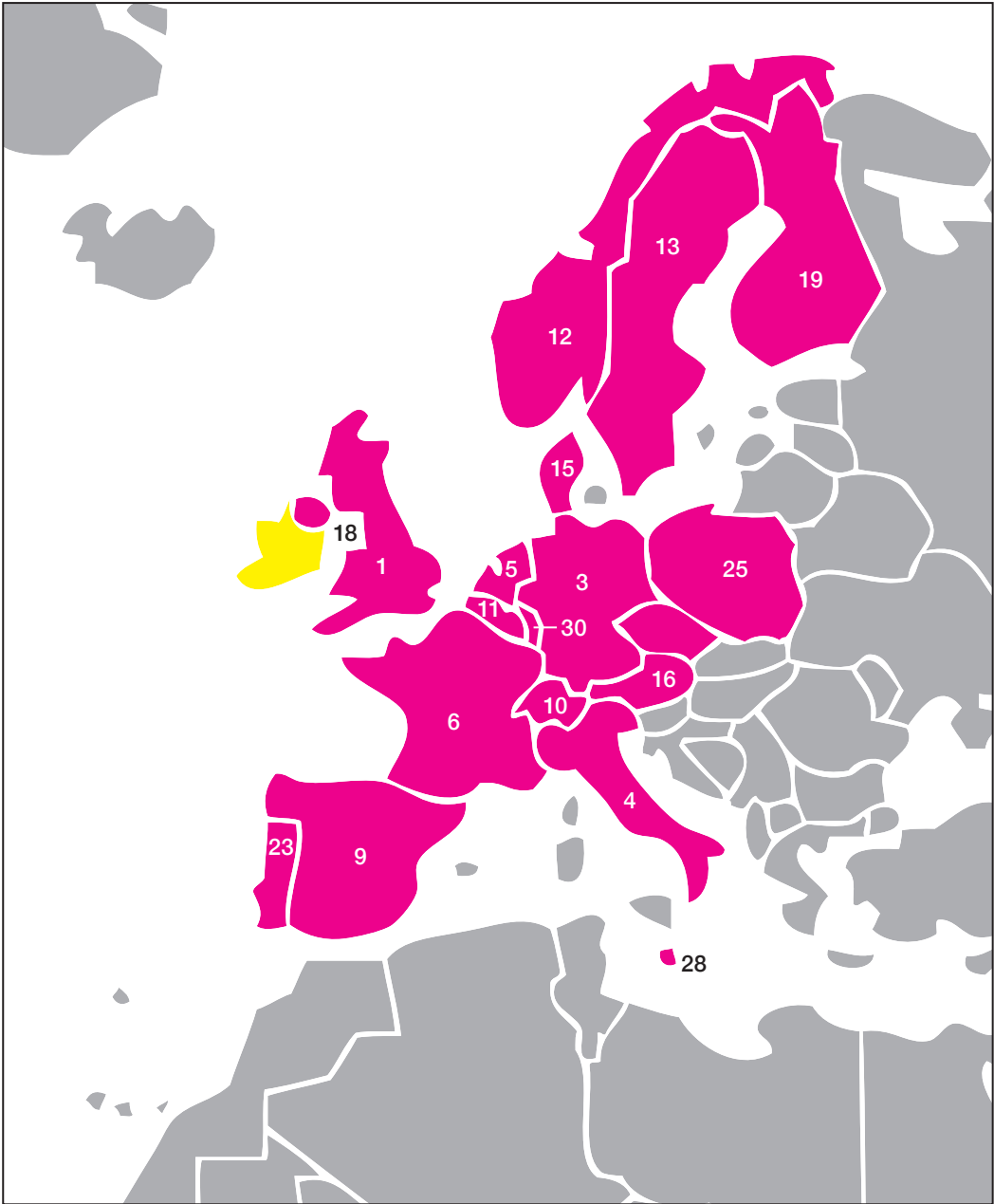
1. UNITED KINGDOM <i>excluding N.I.</i>	156,504
2. UNITED STATES	39,767
3. GERMANY	10,853
4. ITALY	8,709
5. NETHERLANDS	6,702
6. FRANCE	6,621
7. CANADA	6,189
8. AUSTRALIA	5,197
9. SPAIN	4,610
10. SWITZERLAND	3,338
11. BELGIUM	2,862
12. NORWAY	2,425
13. SWEDEN	2,344
14. MALDIVES	1,671
15. DENMARK	1,581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

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

FACT

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

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



"Great country and people."

Australia

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

Italy

"Thoroughly enjoyed the festival."

Netherlands

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

Germany

"Absolutely lovely country & people."

Spain

"Fun, lively, great shopping."

Canada

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

Finland

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

United Kingdom

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

Switzerland

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

USA

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

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

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

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


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

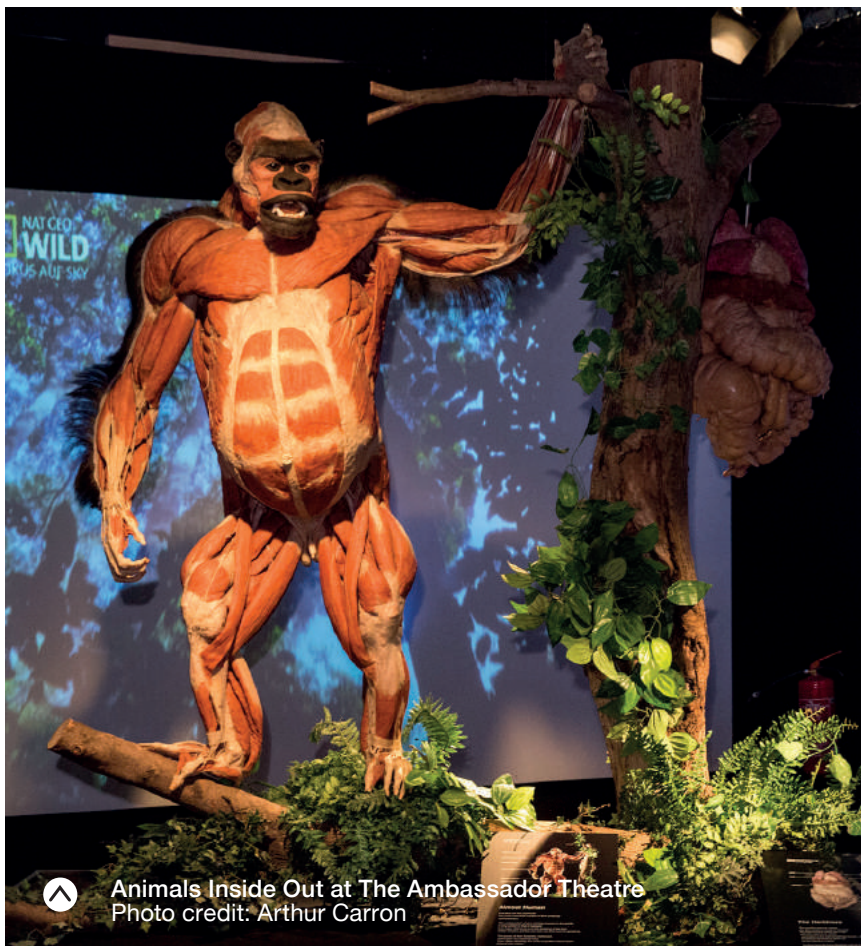


Attendance by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists


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




Cirque Du Soleil
 Photo credit: Jarid A. Barrin




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


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

Keith English, Managing Director, Ticketmaster Ireland














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

Barry Kenny, Corporate Communications Manager, Iarnród Éireann.


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

Paul Latham, COO Live Nation UK & Ireland

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

BREAKDOWN			
Republic of Ireland	=	Dublin + Rest of Republic	Northern Ireland
Events			Events
MUSIC			
			
€60m	€39m	€21m	€23m
ARTS, THEATRE & COMEDY			
			
€31m	€28m	€3m	€1m
FAMILY, ATTRACTIONS & EXHIBITIONS			
			
€3m	€2m	€1m	€0.05m
TOTAL			€24.05m
€94m			



▲ Andrea Bocelli, 3Arena
Photo credit: Paulo Goncalves



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













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

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

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

Ian Dempsey, National Broadcaster

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

BREAKDOWN			
<div> <div>Republic of Ireland</div> <div>=</div> <div>Dublin</div> <div>+</div> <div>Rest of Republic</div> </div> <div>Events</div>			<div>Northern Ireland</div> <div>Events</div>
MUSIC			
<div>  </div> <div>€25m</div>	<div>  </div> <div>€16m</div>	<div>  </div> <div>€9m</div>	<div>  </div> <div>€9m</div>
ARTS, THEATRE & COMEDY			
<div>  </div> <div>€12m</div>	<div>  </div> <div>€11m</div>	<div>  </div> <div>€1m</div>	<div>  </div> <div>€0.4m</div>
FAMILY, ATTRACTIONS & EXHIBITIONS			
<div>  </div> <div>€1m</div>	<div>  </div> <div>€1m</div>	<div>  </div> <div>€0.2m</div>	<div>  </div> <div>€0.02m</div>
TOTAL			€9.42m
€38m			



Ed Sheeran

Photo credit: Kathrin Baumbach

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Photo: Ed Sheeran

Quote: Tom Dunne

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

Tom Dunne, National Broadcaster and Musician

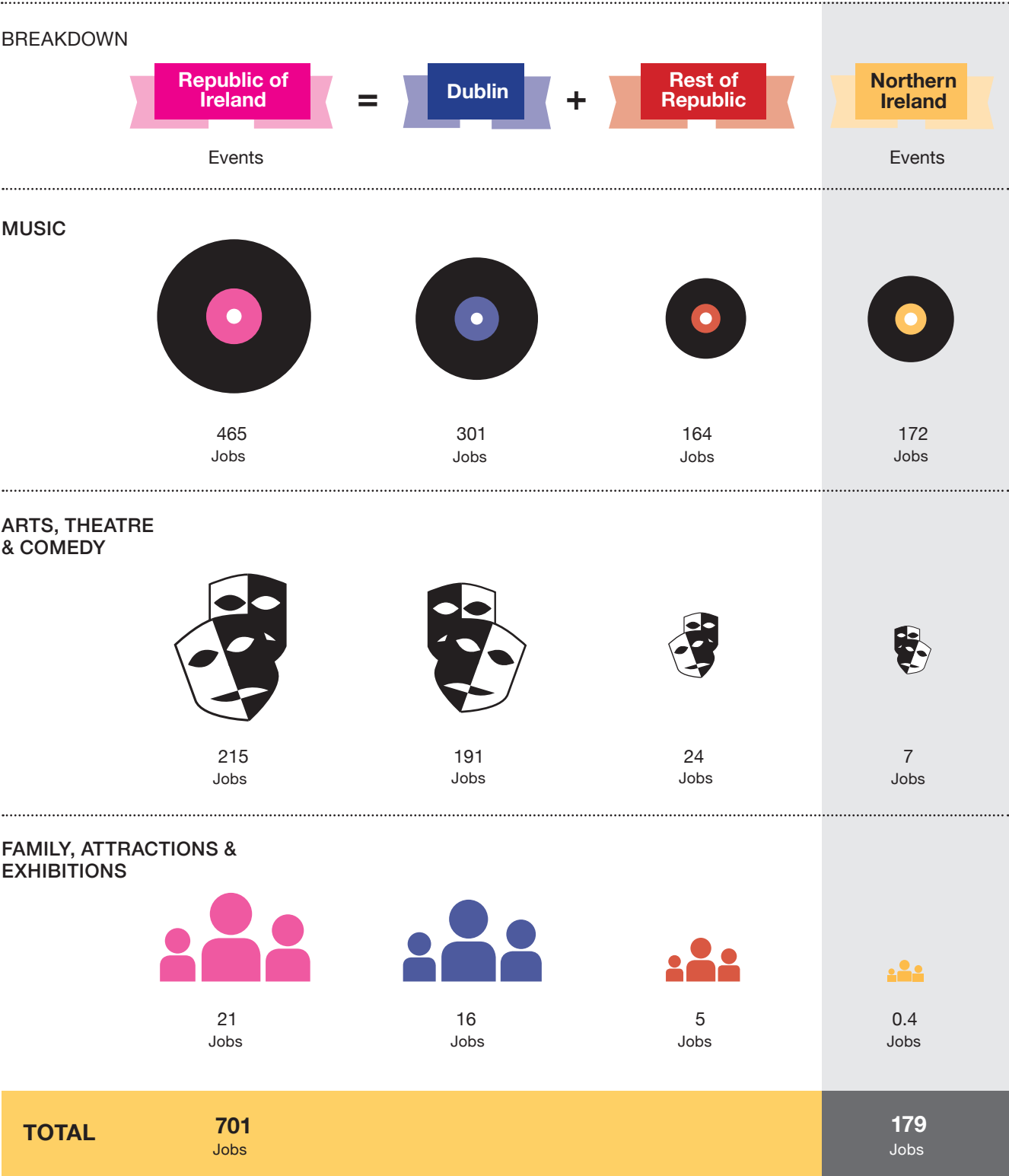


Live events, performances, exhibitions, concerts or installations in the Arts are the flowers on the plant whose roots are in every part of Dublin. Our diverse culture grows up and is sustained in families and schools and in our local neighbourhoods, at music and art classes and in the patient developmental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

Ray Yeates, City Arts Officer, Dublin City Council



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





AC/DC, Aviva Stadium
Photo credit: Kathrin Baumbach



Avicii, Marlay Park
Photo credit: David Doyle

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

**Martin Murphy Stadium Director
Aviva Stadium**

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

Ray O'Donoghue, Festival Director

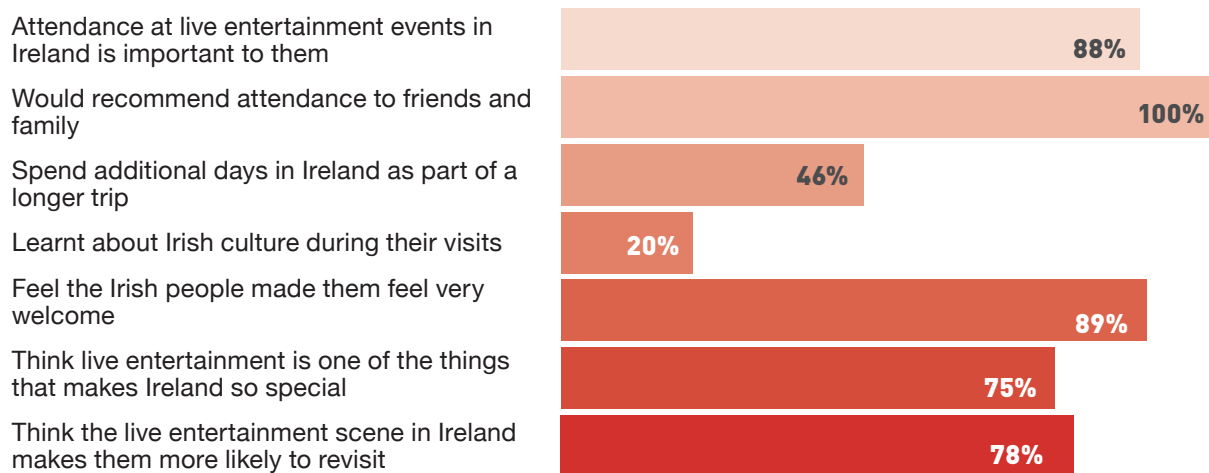
“Live events, especially music, theatre and sport, have a hugely positive economic impact in Dublin and greatly contribute to the vibrancy of the pubs and bars across our Capital City.”

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

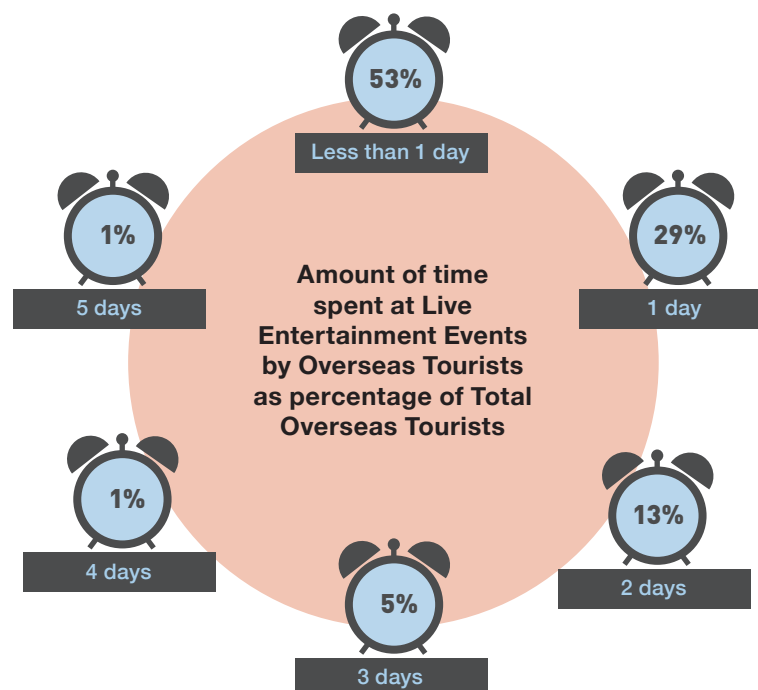


Value placed on Live Entertainment Events by Overseas (i.e. outside both Republic of Ireland & Northern Ireland) Tourists

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



Proportion of attendees at live entertainment events:



✓ Panti Bliss aka Rory O' Neill launching The Outing Festival
 Photo credit: The Outing LGBT Music & Matchmaking
 Festival www.TheOuting.lgbt



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

Rory O'Neill aka Panti Bliss

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

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

Economic Conclusion from BOP Consulting



Kodaline, Royal Hospital Kilmainham
Photo credit: Paulo Goncalves

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

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

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

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

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

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

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



Richard Naylor
Director, Research



Jonathan Todd
Chief Economist

BOP
Consulting



Jay Z, 3Arena

Photo credit: Paulo Goncalves

Economic Methodology of Report from BOP Consulting

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

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

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

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

BOP Consulting

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

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Imelda May
Photo credit: Paulo Goncalves

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

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

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

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

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

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

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

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

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



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

**Hozier Musician,
Singer & Songwriter**

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

**Zach Desmond,
Longitude Promoter**



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



THEATRE FORUM LETTER OF SUPPORT

Sophie Ridley,
Chair of the EPIC Working Group.

26 June 2020.

EPIC's request for support for the country's events and performing arts organisations.

Dear Sophie,

The Board and members of Theatre Forum extend their support to EPIC and the submission requesting Government support for events and arts organisations. We too think these supports are critical if event and arts organisations are to survive the Covid-19 crisis and return to offer audiences across the country live dance, theatre and music performances and events.

Employment supports are essential

Before Covid-19 the arts sector was already one of low pay, poor conditions and a prevalence of precarious work. Theatre Forum's *Review of Pay and Conditions in the Performing Arts in 2018* highlighted a bleak employment situation for artists and arts workers: **One third of artists and creative practitioners earned less than the National Minimum wage.**

60% of PAYE jobs in performing arts organisations pay less than the average national annual earnings across all sectors in 2017 of €35,365.

In that survey, 30% of artists and creative practitioners in the performing arts earned less than the 2018 National Minimum wage of €9.55 per hour. This is partly because 83% were paid flat fees regardless of the number of hours worked. In the unlikely situation that this level of work was sustained throughout the year, on average they would have earned €22,752, just 64% of the average annual earnings of €35,365 across all sectors in 2017.

"€13,000 a year - would you accept that salary in a full-time position, with a graduate degree and 10 years' experience?" Contributor to the Artists' Forum December 2018.

The Covid-19 crisis has made this bad situation worse. Since mid-March, there has been little or no work for artists and arts workers. This situation is likely to continue through the rest of 2020 and into 2021 while social distancing measures are in force for the country's theatres, arts centres, venues and festivals. With Summer being the busiest festival and concert time of the year, it's also the time of greatest earning potential for artists, performers, technicians and crew. For many without work since March 2020, early summer 2021 is the first time these arts workers might expect to work again. So, for a sector that simply cannot get back to work safely with social distancing is still in force, the Pandemic Unemployment Payment (PUP) and Temporary Wage Subsidy Scheme (TWSS) are lifelines to the promoters and production companies, musicians and actors, technicians and crew that put performances and concerts on our stages.

Industry Assistance Programme

Four fifths of jobs in the performing arts are precarious. That precarity extends to artists and arts workers, both freelance and PAYE workers. Many are unable to make PRSI contributions further limiting access to benefits.

81% of all jobs in festivals, venues and production companies are temporary, offer irregular hours each week, are freelance contracts or a profit share.

"It's like starting over and over and over on a zero hours contract."

Contributor to the Artists' Forum December 2018

48% of performing artists and creative practitioners were unable to make any PRSI contributions between August and October 2018

"I can't access medical card services because they are means tested, whilst at the same time not being able to afford primary health care." Contributor to the Artists' Forum December 2018

This collective experience supports the evidence of the 2018 TASC report, *Living with Uncertainty, The Social Implications of Precarious Work*, pointing out that "precarious work is usually poorly paid and under-unionised, lacking in important benefits such as pension contributions, sick leave or parental leave. In its effects on housing, health and family life, precarious work often spills over into precarious lives".

Precarious work means precarious lives. And precarity affects health and well-being. For artists and arts workers, the crisis has compounded their precarious employment situation. Like EPIC, we believe that an Industry Assistance Programme to cater for the mental health and wellbeing of event and arts workers is urgently and desperately needed during and long after this crisis.

Cross Sectoral Taskforce

The Covid-19 crisis has highlighted just how often and how many people enjoy live performances and the gap their absence creates in our lives and communities. It has also highlighted the interdependencies in the event, entertainment and arts sector. There's growing recognition that sector-wide thinking, supports and collaboration are essential if artists, arts workers and organisations are to survive the crisis and emerge from it able to offer audiences events and live performances. We have greatly appreciated the support of the AIST for the Re-opening Arts Centres Working Group these last few months and would welcome an opportunity to work with you and a taskforce to support the recovery and renewal of the live performance sector.

Yours sincerely,



Anna Walsh, Director.

Cc Liam Fitzgerald, Chair AIST