



Case Study

# Croke Park



Ireland's Experience Economy

**More than meets the eye**

## What is the Experience Economy?

The Experience Economy consists of businesses and a workforce that operate across multiple sectors in Ireland as well as encompassing organisations in the arts, cultural, sporting and heritage sectors, it includes hospitality, retail, travel, food and drink, tourism, attractions and venues, entertainment, events and activity providers.

Ireland's Experience Economy contributes €4 billion annually to the Irish economy and employs over 300,000 people. Ibec is leading a campaign to educate all stakeholders about the reach and value of the Experience Economy.

Our campaign *More than meets the eye* seeks to highlight not only the “front of house” sector itself but also the vast array of services and industries that support hospitality, leisure, tourism and entertainment sectors in Ireland, and thereby make the case for better focus on the status of the Experience Economy and its wider ecosystem.

The Experience Economy and its supply chain, touches not only on more developed economic environments but also the “hard to reach” yet critical parts of the economy and society in Ireland, including regional/rural areas with limited economic opportunities, small businesses, and economically disadvantaged groups (e.g. young people).

This case study illustrates the ecosystem of the Experience Economy.



## Croke Park

**Ireland has a rich sporting heritage, which is deeply rooted in Irish communities, from participating to spectating.**

### Background

Major sporting events are also more than competitions and contribute substantially to the Experience Economy by offering attendees a blend of entertainment, camaraderie and cultural immersion. They have an economic impact that boosts local economies, and they can attract major tourist activity (e.g. Six Nations rugby) or spawn associated festivals and side events (e.g. the Galway Races), while the advent of digital technology offers augmented sporting experiences through apps providing real-time statistics, commentary and interactive features, and spawns considerable opportunities for branding and associated merchandise. A 2021 report for Sport Ireland estimated that Irish consumers spent over €3.3 bn on sport in 2018, and it valued the economic activity of volunteers at €1.5 bn<sup>10</sup>.

Cumann Lúthcleas Gael, better known as the GAA (Gaelic Athletic Association), is an all-island association and Ireland's biggest sporting organisation, with over 2,200 clubs at grassroots level. At the pinnacle of the GAA pyramid is Croke Park, a stadium which showcases Irish sport and culture, and provides a range of different memorable experiences. Home and headquarters of the GAA, it was purchased in 1913, and in the intervening years it has developed into one of the finest stadiums in Europe, with a current spectator capacity of more than 82,000.

### Current Activities and Scale

The primary purpose of Croke Park is to host Gaelic Games. In 2023, there were 67 games played at the stadium across 33 match days. These games



included the showpiece All-Ireland Championship finals in football (both men's and ladies'), hurling and camogie, as well as All-Ireland club finals and other county league and championship games. In 2022, match attendances at Croke Park totalled about 890,000.

In addition, Croke Park hosts a range of under-age “blitzes”, “Go Games” and finals days for its county units – in camogie, football and hurling – offering young boys and girls the experience of playing at Ireland’s most iconic GAA venue. In 2022, there were 17 match days allocated for these experiences.



With its capacity of 82,300, Croke Park is also UEFA and FIFA certified, and it has hosted numerous high profile international, sporting, cultural and music events outside of Gaelic Games. It has in the past hosted Six Nations matches in rugby and FIFA World Cup and UEFA European Championship qualifiers in soccer, it is one of the designated stadiums for UEFA’s upcoming Euro 2028 finals tournament, it has hosted the Muslim celebration of Eid Al Adha during 2020 and 2021, and it will host music concerts by major international acts like Bruce Springsteen and Coldplay in 2024. During 2022 alone, attendees at such major concerts and special events exceeded 500,000, while the stadium site also offers:

- > guided tours, including a visit to the GAA Museum, as well as associated seasonal experiences, e.g. “Legends Tours” during All-Ireland Championship months, the “Hurloween” Tour, and a Santa Experience Tour;
- > a rooftop walkway for the Kellogg’s Skyline Tour, offering spectacular views across Dublin city accompanied by an interactive audio guide;
- > major facilities for conferences, trade shows and smaller meetings and events;
- > a variety of catering and food services; and
- > a 4\*, deluxe 232-bedroom hotel.

During 2022, a total of 103,000 visitors attended the GAA Museum and Skyline Tour experiences, while 108,000 people attended conferences at Croke Park, with many of these being international visitors. Overall, well in excess of 1.6 mn people enjoyed a Croke Park experience of some



kind in 2022, including an international visitor share of up to 50% for major concerts, and around 20% for museum visits.

Croke Park is therefore a prime visitor attraction for Dublin in its own right, it is an important part of the Destination Dublin brand, and it is an integral part of the Dublin experience for both domestic and international tourists. Also, major events like the All-Ireland Championship finals and concerts are important not just for Croke Park, but for Dublin in general, providing a major boost to the city's economy. In quantifiable terms the stadium at Croke Park employs nearly 40 people on a permanent basis, with a wages and salaries bill of €2.3 mn (including maintenance or grounds staff, marketing and administration staff, and management), while another 15 people are employed by the GAA Museum and Skyline Tour, and GAA headquarters at Croke Park is home to over 100 other personnel. These numbers, however, vastly underestimate the stadium's wider jobs impact, as all catering is provided by external contractors, and there are up to 1,500 additional personnel working at or around the stadium on major match/event days, with 60% of this employment coming from the local area.

### Importance to the Local or Regional Economy

Croke Park is strongly linked into its local community, and a major driver in the North Dublin economy. Croke Park has recently developed menus featuring ingredients sourced only from within a 50 mile radius of the venue, with 85% of all ingredients used being sourced within the island of Ireland, and 70% of ingredients being sourced within 50 miles, including at Croke Park's own farm (pictured next page).



Sustainability is also a core value that underpins Croke Park operations, which is rooted in its local and regional economy. For instance:

- > as well as providing produce for food and catering operations, Croke Park's farm grows its own turf for the Croke Park pitch, and for GAA stadiums all around Ireland, thereby reducing the carbon emissions associated with imported turf;
- > a wide range of energy efficiency measures are in place at the stadium, and solar panels at the farm offset much of the carbon footprint associated with powering Croke Park;



- > the stadium is a member of the Water Stewardship Programme, designed to reduce consumption and introduce more efficient water monitoring and management, saving up to 300,000 litres of water per day;
- > passive infrared sensors (PIRs) make sure lights are not on when not needed, and all heating and cooling is controlled by a building management system;
- > the stadium achieved its zero-waste target – 100% recycled, re-used or recovered – in 2014, six years ahead of target; and
- > Croke Park promotes hidden urban habitats, with nesting boxes throughout the stadium campus and its own “bug hotel”.

Croke Park was also the first stadium in Ireland and the UK to achieve both ISO 14001 and 20121 standards (for environmental managements systems sustainability of events) and first in the world to obtain the newest ISO 14001 standard (ISO 14001-2015).

### Business Outlook

The impact of the Covid-19 pandemic on Croke Park stadium revenue, and on overall GAA revenue, was considerable, with a reduced number of match days, restricted attendances, no music concerts or similar events, and a considerable fall-off in meetings and other events activity. At the same time, the stadium did find other uses, for example creating a virtual studio to allow

hybrid events, serving as a virtual campus for the Royal College of Surgeons in Ireland, and hosting a centre for Covid-19 vaccinations.

However, while a third of the financial year to September 2022 was affected by Covid restrictions, business at the stadium nonetheless bounced back very strongly from February 2022. Revenue for Páirc an Chrócaigh and subsidiary companies, for example, was over €52 mn for the period, compared to about €11 mn for the previous year (11 months). Furthermore, this was higher than the revenues of nearly €48 mn recorded in 2018-19. Outlook for business at the stadium in 2024 is also good, bolstered by a full schedule of Gaelic games, forthcoming concerts and similar events, and good demand for meetings and events.

Going forward, the Stadium and Commercial Director at Croke Park, Peter McKenna, emphasises the importance of the role of “experiences” in enhancing people’s general happiness. In particular, public concerns about housing, health services and rising prices might suggest that Ireland is not as “happy” as it once was, or that steady rises in GDP per capita do not necessarily indicate rising happiness. The importance of “happiness contributors” (e.g. memorable experiences), and the role of the Experience Economy in this regard, is therefore worthy of recognition from a broader quality of life perspective. Also, while public transport is perceived to have improved over the last decade, there is still considered to be room for improvement to assist in facilitating Experience Economy activities.



## About Ibec

**Ibec is Ireland's largest lobby group and business representative. We campaign for real changes to the policies that matter most to business. Policy is shaped by our diverse membership, who are home grown, multinational, big and small and employ 70% of the private sector workforce in Ireland.**

**With 39 trade associations covering a range of industry sectors, 6 offices around Ireland as well as an office in Brussels. With over 300 employees, Ibec communicates the Irish business voice to key stakeholders at home and abroad. Ibec also provides a wide range of professional services and management training to members on all aspects of human resource management, occupational health and safety, employee relations and employment law.**



## Ibec Trade Associations

### Representing your industry

Representing your industry Ibec understands that every business is different. There are the general issues which face all businesses operating in Ireland and then there are the issues specific to individual sectors or categories of the economy. To reflect the distinct interests of all our members, there are 39 business associations within the Ibec group. Ibec's trade associations identify and champion issues of importance to their respective members and provide great knowledge sharing, networking, and training for all these industries.

Ibec's trade associations are strong brands in their own right and those that represent the Experience Economy include:

- Ibec Networks
- Retail Ireland
- Food Drink Ireland
- Drinks Ireland
- Irish Whiskey Association
- Dairy Industry Ireland
- Meat Industry Ireland
- Technology Ireland
- Telecommunications Industry Ireland
- Audiovisual Ireland
- Travel, Leisure & Hospitality Network
- Supply Chain Network
- Small Firms Association

**#YourExperienceEconomy**

**#MoreThanMeetsTheEye**

**[www.ibec.ie/influencing-for-business/  
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