



Case Study

# Sea Sessions



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.



## Sea Sessions

**Ireland, with its rich musical heritage, hosts a wide range of music festivals each year, drawing local and international audiences.**

### Background

These major festivals are also now frequently more than music events, featuring a diverse assortment of additional elements to enhance the overall experience. Electric Picnic, for example, features art installations, theatrical performances and a well-being area, while All Together Now emphasises spoken word, comedy acts and sustainability as well as music. Similarly, largely non-music festivals, e.g. the Galway International Arts Festival, increasingly incorporate music as part of their core programme.

Sea Sessions, an annual music festival in Bundoran, Co. Donegal, combines music with surfing and beach culture. Since 2008, it has taken place over three days in June, with the only interruption to this being during the years affected by the Covid-19 pandemic. Its concept evolved out of a small local surf event for young surfers, when one of the festival's co-founders, Pete Craig, suggested that "it would be great to have a band on". Each of the three co-founders, Daniel Brown, Pete Craig and Declan Madden, then contributed €15,000 to put on a music festival, which in its first year was all about "learning by doing". There were some events in local bars and clubs, and music in a circus tent on the main beach. There was no proper fencing, no litter picking crew, no proper box office, and "the beer wouldn't flow in the taps". The founders' three wives became the box office, the three founders were the litter picking crew, and beverage sales consisted of cans of Jim Beam and Coca Cola rather than beer. Only 800 tickets were sold, but about 500 more were admitted free to make the event look and feel like something. Therefore, despite these numerous problems and the loss of money on top of the original investment, the event was a major success as an "experience" and provided something to build on.



## Current Activities and Scale

The core ethos and aim of the festival remains unchanged, and Sea Sessions has become Ireland's "Surf Music Festival". However, business has grown from 800 paying attendees in 2008 to an event that now has an attendance capacity of 10,000, which regularly sells out on an annual basis. It has also become an established part of the Irish festival scene, and has thrived in a very competitive marketplace, where simply surviving and staying trading can be considered something of a success.



At present, the scale of the festival site accommodates three main stages, eight bars, a two-day surf event, a skate ramp contest, beach yoga, volleyball, a 5,000 capacity camp site, and glamping. However, with a current budget for artists of about €500,000, ability to access an attractive line-up of high profile and popular music acts is a key driver in scaling the festival's success. Sea Sessions has over time therefore built up an established credibility in this regard by demonstrating an ability to sell the event itself and manage event production and logistics, which in turn gives artists a confidence in the quality of the festival experience being staged.

In addition, the surfing- and beach-oriented side of the festival gives it a unique selling point alongside its live music centrepiece, and music sites at the festival are purposely not opened until mid/late afternoon to allow people to participate in beach sports. In line with this, the marketing of Sea Sessions actively encourages and promotes the enjoyment of outdoor activities and the Wild Atlantic Way coast during the day, and then having fun and listening to great music as the sun sets in the evening.

Revenues generated by Sea Sessions are currently close to €1.5 mn per annum, which is drawn from ticket sales (50%), food/drink and other concessions (25%), and sponsorship (25%). There are two full-time employees, the Festival Director and the Head of Administration, but approximately 160 other staff are also employed for various lengths of time before, during and after the festival. Some of these staff, e.g. bar staff, are employed specifically for the three days of the festival, some are employed for weeks beforehand and again shortly afterwards, while others are employed from several months before the festival.



## Importance to the Local or Regional Economy

Sea Sessions makes significant contributions to the local, regional and national economy in a number of ways. Firstly, apart from the two full-time local jobs that it supports, just under half of the 160 contract staff hired by the festival are sourced locally. This typically includes people hired as site crew, bar staff and logistics suppliers, while other contract staff hires are for event production staff and security staff, also sourced in Ireland.

Secondly, the Sea Sessions weekend is probably the busiest of the year in Bundoran, and the festival brings a significant number of visitors to the local area, including international visitors. About four in every five festival attendees are visitors, with about 20% coming from the UK and Europe, 40% coming from Dublin and its surrounding area, 20% coming from elsewhere in Ireland, and 20% coming from the local area. Moreover, festival organisers estimate that the average festival attendee spends about €300 while at the event, so based on 8,000 visiting attendees at an average spend of €300 per person, total spend in the local area for the weekend would come to €2.4 mn. In this regard, the share of attendees using the designated camp sites has fallen in the last two years, with more visitors availing of package accommodation and ticket deals with local hotels, B&Bs and hostels. Local restaurants and shops also benefit from attendees' expenditure, while some local bars support the festival with limited sponsorship and by hosting ancillary acts and events, which add to the depth of the overall experience for attendees. In addition, it is felt that Sea Sessions has a significant positive impact in branding Bundoran and helping to position the town as offering a range of year-round music and (marine-based) outdoor activities.



Lastly, festival expenditure on goods and services is typically between €1.1 mn and €1.2 mn annually (including the artist budget of about €500,000). While about 10% of the non-artist budget is spent in the UK (on the main stage marquee and steel shield fencing), the remaining expenditure on goods and services is spent within Ireland. There are also six headline acts each year, with anywhere from 1-3 of these international (for example, Johnny Marr is the only international headline act planned for 2024), but most of the acts (of which there were 66 in 2023) are Irish.



## Business Outlook

As with many other similar festivals and events, Sea Sessions was significantly impacted by the Covid-19 pandemic, which led to there being no festival in either 2020 or 2021. Following the pandemic, attendances were on a par with expectations in 2022, when the festival resumed, but that year also witnessed substantial general growth in leisure spending as people came out of two years of Covid-19 related restrictions. However, numbers were below expectations for 2023 due to wider cost-of-living pressures that dampened expenditure at festivals generally.

Also, fewer attendees at Sea Sessions now choose camping as an accommodation option while attending the festival. This presents potential problems going forward, both for the festival itself and its downstream impact in its local area, as Bundoran has no other significant population centre nearby, and available visitor accommodation options in the town have been reduced in the past couple of years due to need to accommodate recipients of temporary protection from the ongoing crisis in Ukraine.

The single biggest challenge facing Sea Sessions now is such change in its marketplace, and to address this, organisers are looking at different options, such as growing the age demographic of the festival's attendance (through sale of campervan tickets). At the same time, the festivals sector in general is still adjusting to this change in market demand, and some festivals have already been cancelled for 2024. However, Sea Sessions remains a strong brand and

it is believed that there are opportunities to leverage this to create something that is new and innovative in the future, e.g. by scaling the festival to activate the entire town, with stages and experiences from one end of Bundoran to the other.

In terms of helping the business going forward, better transport links within the surrounding area would potentially help to enable more people from surrounding areas to attend the festival on a one-day basis, which could expand the market. Furthermore, change regarding property use and associated planning permissions would be potentially beneficial so that existing available spaces could be quickly utilised, and operators could more deftly find alternate space uses without having to address overly cumbersome obstacles and planning issues.



## 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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