



FÉILE

ECONOMIC

IMPACT

ANALYSIS

FÉILE ECONOMIC IMPACT ANALYSIS

TABLE OF CONTENTS

Section one: Introduction	01
Section two: Location	03
Section three: Féile Classical 2018	05
Section four: FÉILE 2019	07
Section five: What makes this event unique?	09
Section six: Who are the audience?	11
Section seven: What is the event value?	13

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SECTION ONE: INTRODUCTION

Future Analytics Consulting Ltd (FAC) have been commissioned by CWB to undertake a review of the economic impact of the 2018 Féile Classical event and the potential economic impact of the 2019 FÉILE event in Thurles, County Tipperary.

'Trip to Tipp' in Thurles, Co. Tipperary, as the original Féile was known, was first introduced on the August bank holiday weekend in 1990, kicking off a series of 'trips to Tipp' which occurred every summer between then and 1994, including a one day event in 1997.

The seminal Féile events altered the Irish summers for Irish youth by offering a new music experience, and in turn inspiring the introduction of numerous rock and pop music festivals around the country, including Oxygen held from 2004–2011, Electric Picnic which was first held in 2004. Féile hosted some of the most popular musicians of its time, featuring both contemporary Irish and international acts taking place in the Semple Stadium.

CWB is a production, management and promotion company and the organisation behind the initiative of the 2019 'Tipp Classical' festival, its second

consecutive year following the sell-out 2018 'Féile Classical'. The festival has emerged as a nostalgic cultural gathering, appealing to an audience fond of the rock music scene popular in the 1980s and 1990s, celebrating the music popular at the time, with a classical twist.

While the festival promotor was previously unwilling to stage large outdoor events in towns away from the large urban areas of Dublin and Cork but was drawn to the idea by the history of the Féile event and the opportunity to connect with the strong nostalgia for the Tripp to Tipp, the opportunity to combine a world class line up with a classical orchestra and the beautiful location in rural Tipperary.

The purpose of this submission is to highlight the economic benefit of these events for County Tipperary and the wider region. Utilising data provided from festival promotors CWB for Féile Classical and projections for FÉILE, in conjunction with Failte Ireland data, Future Analytics Consulting have prepared an estimate of direct, indirect and induced spend of employee, non-employee and visitor expenditure.

Overall, the approximate total the direct, indirect and induced contribution of the two festivals was estimated at €6.6m for Féile Classical in 2019 and €14.8m for FÉILE in 2020. This is estimated to result in an associated total support employment of approximately 66 FTE jobs and 148 FTE jobs for Féile Classical and FÉILE, respectively.

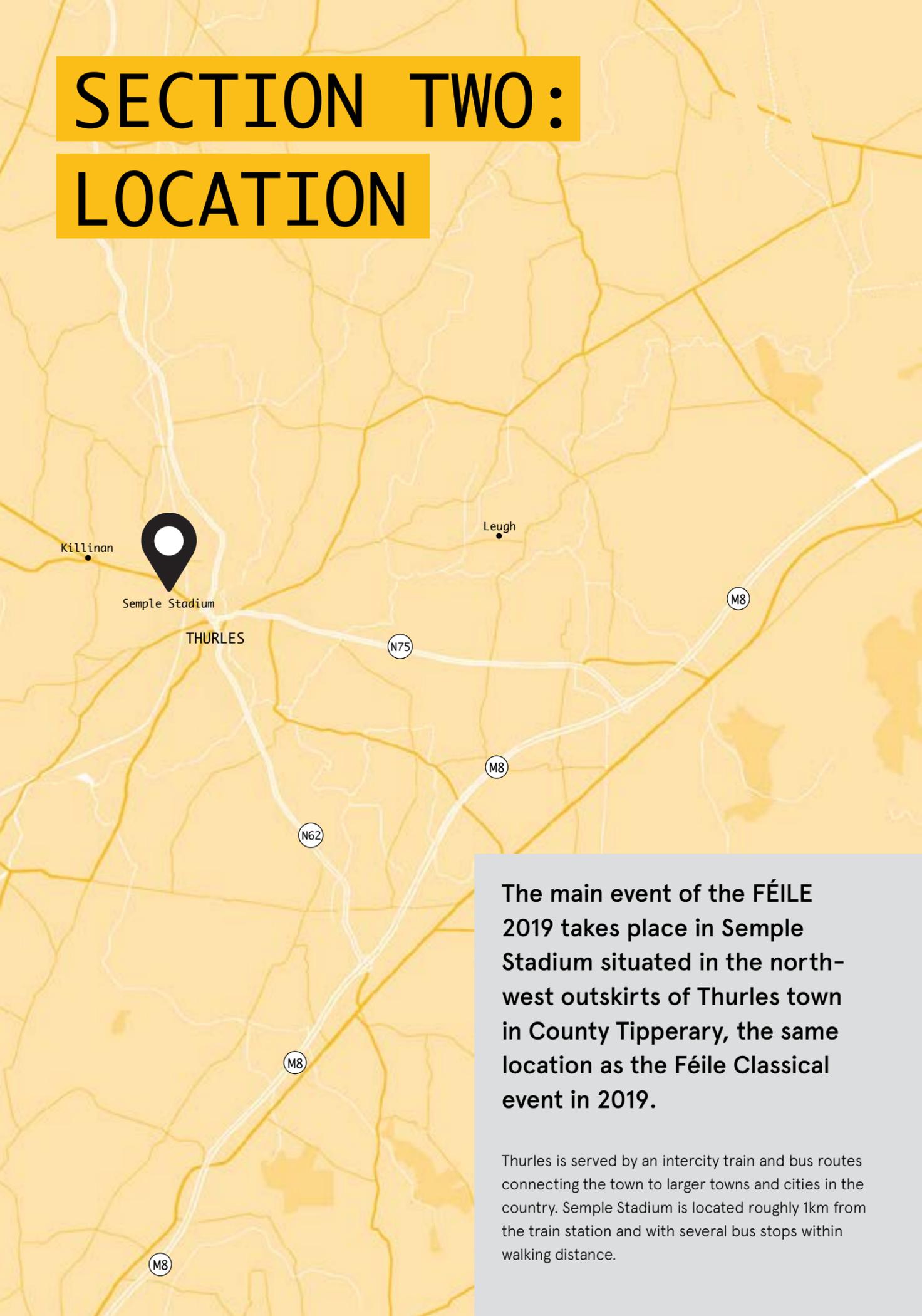


"We've listened and we're delighted to announce FÉILE, a new expanded two-day festival with a line-up that's a mix of classic 90s and contemporary artists, curated with the ICO's tributes to some of Ireland's biggest names in music. This year fans can choose on the night to take a seat in the stand or enjoy the gig from the pitch without having to storm security! I know Jerry Fish was delighted to have been the ring leader of such anarchy last year, he'll have to come up with some new plans for mischief for his tent the Tipp Big Top and leave out rebellion at the Main Stage this year!

– Curator Tom Dunne.



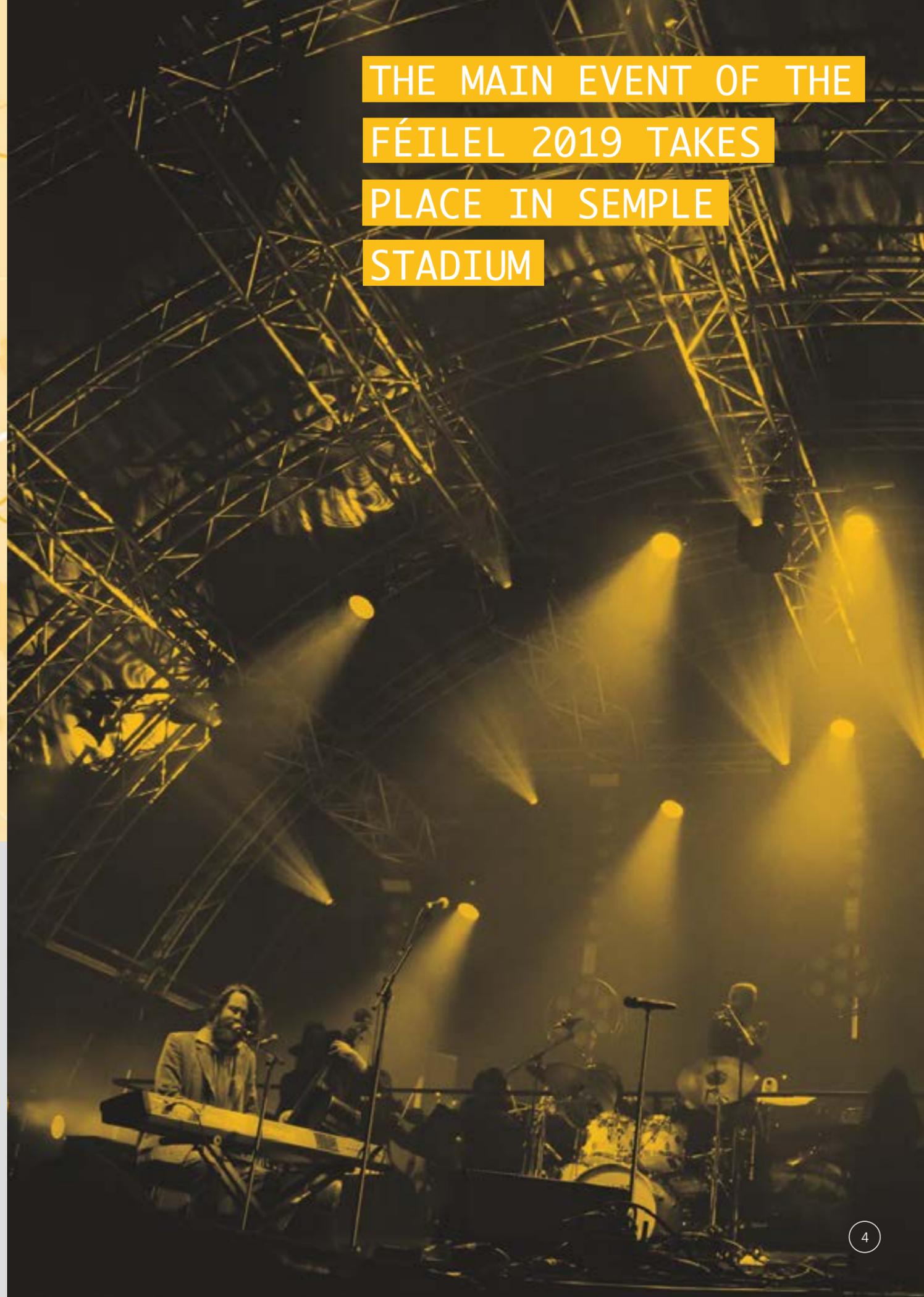
SECTION TWO: LOCATION



The main event of the FÉILE 2019 takes place in Semple Stadium situated in the north-west outskirts of Thurles town in County Tipperary, the same location as the Féile Classical event in 2019.

Thurles is served by an intercity train and bus routes connecting the town to larger towns and cities in the country. Semple Stadium is located roughly 1km from the train station and with several bus stops within walking distance.

THE MAIN EVENT OF THE
FÉILEL 2019 TAKES
PLACE IN SEMPLE
STADIUM



SECTION THREE: FÉILE CLASSICAL 2018



Féile was back – re-establishing Thurles and Semple Stadium as the music mecca it once was!

Féile Classical in 2018 was the first music festival initiated by CWB since the Féile Festival of the 1990s and was developed as a nostalgic cultural gathering. The aim was to deliver an enticing weekend of 1990's rock music along with a variety of other cultural events. Féile Classical was held on Friday 21st and Saturday 22nd September 2018 at Semple Stadium, Thurles.

Many of the acts selected for the festival were very popular in the 1980's and 1990's. The line up was chosen to appeal to an audience demographic who would have seminal memories of the original 'trips to Tipp' in the 1990's.

The line-up for Féile Classical included The Stunning, Something Happens, The 4 of Us, An Emotional Fish, all playing with the Irish Chamber Orchestra with new arrangements of their classic hits, elevating the experience for those attending.

Féile Classical was a sell-out event with 20,000 people attending for two one day events.

Féile Classical in 2018 saw commercial accommodation sell out in all nearby towns. CWB worked with a range of organisations to provide over 3,000 glamping units for those that wish to stay overnight in style and were delighted to see these sell out in 2018.

The live album of the event topped the Irish charts at Christmas 2018. Event organisers received overwhelmingly positive feedback from the festival goers.

Féile was back – re-establishing Thurles and Semple Stadium as the music mecca it once was!



SECTION FOUR: FÉILE 2019



Following the last years' success of Féile Classical, tickets on sale have been increased by 50% to 30,000 to cater for demand. Tipp Classical will be taking place on Friday 20th and Saturday 21st September 2019 at Semple Stadium and at other locations in Thurles

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Duration of the festival has also been increased by one day occurring on the Friday and Saturday, with a different full line-up each day.

The eclectic line-up includes The Fat Lady Sings; The Frank and Walters; Eleanor McEvoy; Something Happens; Sinead O'Connor; Horslips; and The Stunning; Sultans of

Ping, all playing very special performances with the Irish Chamber Orchestra.

The main event and line-up of the festival will play in the Semple Stadium, a seated event requiring a festival pass to access. Additional free musical events will take place in and around the town including the free Music Trail and other events around Thurles' Liberty Square, including 12 pop-up gigs in local unique venues such as barber shop and in a betting shop.

Another exciting feature of the festival which will appeal to many attending is FÉILE TV Live taking place in the Dome, situated opposite Semple Stadium hosted by Paul Collins and The 2 Johnnies, with The Independent's John Meagher, featuring live conversations about music and sport..

Jerry Fish of An Emotional Fish will host The Tipp Top which will take place in a full-size circus tent and serves as the fringe stage where a variety of entertainers will perform including magicians, comedians, and popular 1990's bands.

The 2 Michelin Star Chef and Tipperary native Kevin Thornton, will curate Food for Life – a very special food area featuring the cream of the mid-west's food producers, award-winning cocktails by Dingle Gin, the return of the Prosecco Tent and very special musical guests throughout the day.

Building on the success of Féile Classical CWB are providing over 10,000 glamping beds for 2019. These include a broader range of options, suiting all price points for the Tipp Classical festival. In addition, visitors can avail of traditional accommodation options including hotels, B&B's guesthouse and Air B'n'B, with many options, up to 80km from Thurles already sold out.

SECTION FIVE: WHAT MAKES THIS EVENT UNIQUE?



Nostalgia with a modern twist – FÉILE and last year's Féile Classical are ambitiously curated boutique festivals the concept of which is to provide an event which will appeal to a target audience of those in their 40's and 50's who would have travelled for a Trip to Tipp in the 1990's. The line-up includes bands that would have been popular in the 80's and 90's playing alongside the Irish Chamber Orchestra.

Providing comfort and style – This is a boutique festival with high quality food and drink and accommodation options – catering for those with a higher disposable income who would like style and comfort at the event. Special considerations have been made in regards accommodation, food and beverage options and other amenities offered to the visitors during the festival weekend. The accommodation offered as part of the festival set-up includes glamping and a wide range of amenities for an enhancing and relaxed festival experience.

The festival as an attraction – FÉILE is a musical event catering for both a national

and international audience, but while the event is act-driven, the festival itself is an attraction. The two-day festival will include a wide range of events, happenings and attractions within the area of Thurles town, with additional free events which will attract ancillary visitors to the area. Set in a traditional rural setting, the festival will offer an all-around experience including music, food and culture.

Local Benefit – while the event is being held in a rural area it is not in a greenfield setting where ticket revenue is spent on promoters concessions. Significant benefit will flow to accommodation providers, pubs, restaurants, cafes and other businesses in and around Thurles and neighbouring towns and villages.

Appealing to a wide audience – A large effort has been made to create a unique line-up which differentiating itself from other summer music festivals established in Ireland. Tipp Classical will feature the premiere of two unique concerts especially arranged for the festival including music by Thin Lizzy and Shane MacGowan, both popular musicians appealing to the national and international crowd.

SECTION SIX: WHO ARE THE AUDIENCE

Origin

FÉILE has been curated to attract the both the domestic and international audience. Data, sourced from Ticketmaster, show that 20% of the tickets were sold outside of Ireland and that most of the overseas audience whom attended the Féile Classical 2018 originated from United Kingdom, approximately 60%, 25% from USA and 10% from Germany and France. The two unique concerts celebrating the music of Thin Lizzy and Shane MacGowan will be particularly attractive to the

German and French markets, based on the popularity of the two artists in these countries.

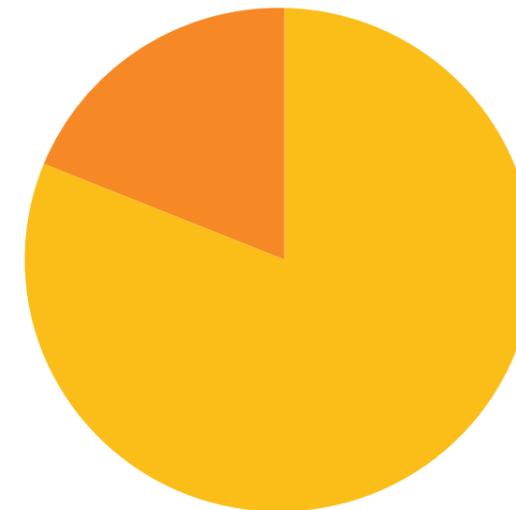
In terms of visitors originating from Republic of Ireland, the largest proportion came from county Tipperary, second largest group from county Dublin, closely followed by county Cork.

55% of the audience are from within Munster
Over 50% of the attendance travelled from more than 100km from Thurles.

Fáilte Ireland's target category groups; the Culturally Curious; Great Escapers; and Social Energisers will positively respond to the offerings and experiences at the FÉILE, which will be a friendly, cultural and participatory event. The characteristics of the Tipp Classical align with Fáilte Ireland's Five Irish Holiday Pillars; Living Historical Stories, Awakening the Senses; Active in Nature; Vibe of the City; and Connecting with People.

Who attended Féile Classical?

Overseas Visitors Domestic Visitors



Age

According to the Féile Classical 2018 data, the most prevalent age cohort attending the festival was 35-50 years old, comprising 80%, with 55% female of the total attendants.

Where did the overseas visitors come from?

UK USA Other
Germany and France



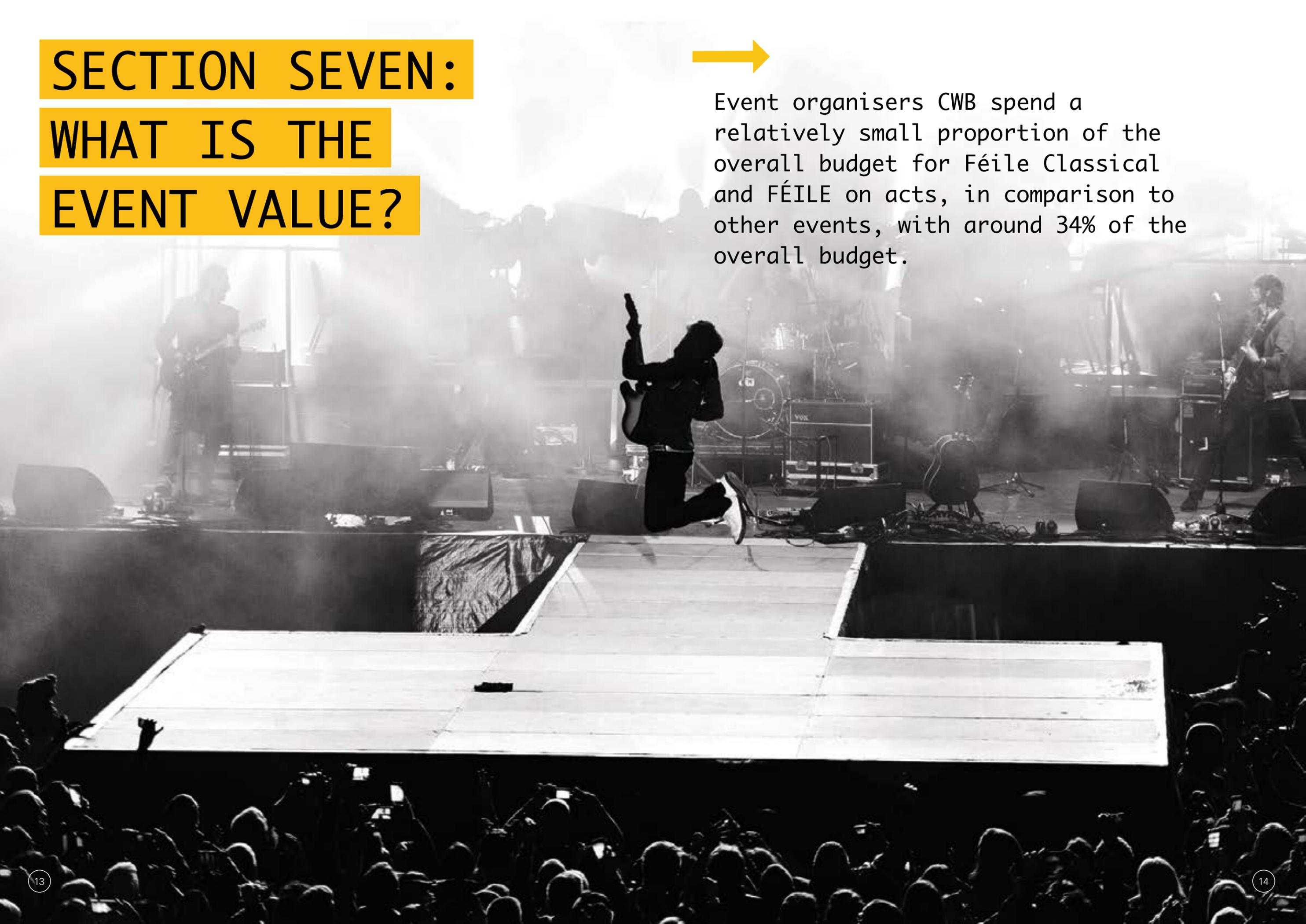
Visitor spend

While a detailed questionnaire has not been undertaken for Féile Classical in 2018 on site estimates indicate that the average spend per head was €35 per person per day. This is a relatively high figure for a festival and reflects that this is an older audience with higher disposable income than other events such as Electric Picnic.

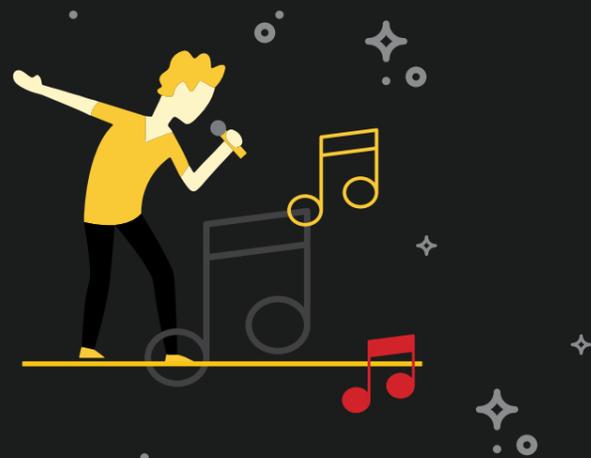
SECTION SEVEN: WHAT IS THE EVENT VALUE?



Event organisers CWB spend a relatively small proportion of the overall budget for Féile Classical and FÉILE on acts, in comparison to other events, with around 34% of the overall budget.



Some facts and Figures on Féile Classical 2018



> TICKETS

17,000 of tickets sold

> 100KM AWAY

Over 50% of people from more than 100km away from Thurles

> ABROAD

Over 20% of people sold outside of Ireland

> BEDNIGHTS

Over 6000+ bednights sold as a direct result the concerts

> NO 1 ALBUM

Spawned a No 1 Album for Christmas and revitalised many of the act's careers

Some facts and figures on FÉILE 2019

> 2-DAY WEEKEND

A 2 day long festival with a different line up each day

> CAPACITY

Capacity of up to 30,000 over the weekend

> ACCOMMODATION

All rooms for 80kms in each direction sold out since announcement

> GLAMPING

With over 4000 glamping beds being installed in the Town

> HUGELY EXPANDED

A hugely expanded music and non-music program within the Stadium

> WORLD EXCLUSIVE

2 world exclusive performances with Shane Mc Gown and Thin Lizzy

> EMPLOYMENT

Employing over 500 staff for the build-up and operation of the festival



This chapter describes the economic contribution made by FÉILE in 2018 and the potential contribution of FÉILE in 2019 to the regional economy and the national economy. This includes the economic benefits that flow to the region from expenditure associated with the festival and the subsequent expenditure of domestic and overseas visitors attending the festivals.

Event organisers CWB spend a relatively small proportion of the overall budget for Féile Classical and FÉILE on acts, in comparison to other events, with around 34% of the overall budget. In comparison, the proportion of the budget spend on production is much higher than other events, around 31%. This reflects CWB's objective of making the FÉILE festival the attraction, rather than the acts. Instead the focus is on the ancillary activities such as the Food & Drink village; glamping; the free music trail in Thurles, and all the other tourist and cultural events associated with the festival.

The following is a summary of the key economic benefits that have resulted based on the running to the Féile Classical and FÉILE Festival Events based on data provided by the festival promoters CWB:

EMPLOYEE-Related
Economic Spending
'Direct, Indirect
and Induced'
Benefits:

NON-EMPLOYEE-Related
Economic Spending
'Direct, Indirect
and Induced'
Benefits:

VISITOR-Related
Economic Spending
'Direct, Indirect
and Induced'
Benefits:

**OVERALL Employee/
Non-Employee/
Visitor-Related
'Direct, Indirect
and Induced' Benefits**



> **EXPENDITURES**
Total estimated payroll expenditures of Féile Classical in 2018 and FÉILE in 2019 were €240,000 and €300,000, respectively

> **EMPLOYEES**
Direct Festival employees have an approximate total available spend of €141,990 based on Féile Classical and €177,487 relating to FÉILE.

▶ **CONTRIBUTIONS**
Applying the assumed multiplier, the direct, indirect and induced contribution was approximately €212,985 for Féile Classical and €266,231 for Tipp Classical.

▶ **EMPLOYMENT**
The total support employment associated with these earnings are estimated at approximately 2 FTE jobs and 2.5 FTE jobs for Féile Classical and FÉILE.

> **EXPENDITURES**
Non-employee total expenditures of the two festivals were estimated to be approximately €1.1m for Féile Classical and €1.3m for FÉILE.

> **LOCAL SUPPLIERS**
It is estimated that approximately €556,000, for Féile Classical, and €625,000, for FÉILE, are accruing to locally based suppliers.

▶ **CONTRIBUTIONS**
Again, applying the assumed multiplier, the direct, indirect and induced contribution was approximately €834,000 for Féile Classical and €937,500 for FÉILE.

▶ **EMPLOYMENT**
In addition, the total support employment associated with the non-employee spend are calculated at approximately 8 FTE jobs and 9 FTE jobs for Féile Classical and FÉILE, respectively.

> **EXPENDITURES**
Visitor-related total expenditures of the two festivals were estimated to be approximately €3.7m for the one-day Féile Classical and €9m for the two-day FÉILE.

▶ **CONTRIBUTIONS**
Through the application of the multiplier, the direct, indirect and induced contribution was approximately €5.5m for Féile Classical and €13.5m for FÉILE.

▶ **EMPLOYMENT**
Again, the total support employment associated with the visitor-related spend are calculated at approximately 55 FTE jobs and 136 FTE jobs for Féile Classical and FÉILE, respectively.

* assumptions include 20% of non-local visitors staying for 4 nights for Féile Classical and 20% staying for 5 nights for FÉILE.

▶ Overall, the approximate total of the direct, indirect and induced contribution of the two festivals was estimated at €6.6m for Féile Classical in 2018 and €14.8m for FÉILE in 2019.

▶ This is estimated to result in an associated total support employment of approximately 66 FTE jobs and 148 FTE jobs for Féile Classical and FÉILE.

In addition to the significant economic benefit there are other less tangible benefits that arise from the events. These include:

- Raising the profile of Thurles and of County Tipperary,
- Revitalising many act's careers, and
- Providing those attending with an exceptional and memorable experience.

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