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# A Satellite Account for Gaelic Games on the island of Ireland

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October 2024



This research is supported by GAA

## About the key stakeholders

The Gaelic Athletic Association (GAA) is Ireland's largest sporting organisation. It is celebrated as one of the great amateur sporting associations in the world. It is part of the Irish consciousness and plays an influential role in Irish society that extends far beyond the basic aim of promoting Gaelic games. It was founded on November 1, 1884, to make athletics more accessible to the masses and to revive and nurture traditional, indigenous sports and pastimes.

This research has been commissioned by the Gaelic Athletic Association in partnership with the Ladies Gaelic Football Association (LGFA) and the Camogie Association (CA). The research is timely as the three bodies are working towards the integration of Gaelic Games with a proposed merger date of 2027. Research of this type will enable the three parties to understand their economic and social value as they engage with wider stakeholders to enable the integration to be successful.

The GAA today promotes Gaelic Games such as Hurling, Football, Handball and Rounders and works with sister organisations to promote Ladies Gaelic Football and Camogie. The Association also promotes Irish music, song and dance and the Irish language as an integral part of its objectives. The GAA, LGFA and CA have remained amateur Associations since their founding. Players, even at the highest level, do not receive payment for playing and the volunteer ethos remains one of the most important aspects of Gaelic Games

There are approximately 1,650 GAA clubs across the 32 counties of Ireland. When including the Ladies' Gaelic Football Association (LGFA) and the Camogie Association (CA), this number increases to around 2,500 clubs. Approximately 1.5 million people attend the GAA Championships from May to September. The two biggest days in the GAA calendar are the All-Ireland finals in Hurling and Football. It has been estimated that the GAA has invested (in current purchasing power) the equivalent of €2.6 billion in its nationwide infrastructure at national and local level in the past 50 years. The result is that the vast majority of GAA clubs, even in the most rural areas of Ireland, have developed and enjoy ownership of their own grounds and associated facilities. However, it is the Association's Headquarters at Croke Park which has been the subject of the most dramatic redevelopment. The stadium has been thoroughly modernised in a rebuilding project that took place between 1993 and 2005. Its capacity was increased from 64,000 to 82,300 and is now considered to be among the most modern stadiums in Europe. It stands today as a monument to the selfless work and dedication of the GAA's enormous legion of volunteers.

For more information about the GAA visit <https://www.gaa.ie/the-gaa/about-the-gaa>

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## EXECUTIVE SUMMARY

### INTRODUCTION

The Gaelic Athletic Association (GAA) has supported the Sport Industry Research Centre (SIRC) at Sheffield Hallam University in creating a 'Satellite Account' for the Gaelic Games in Ireland. The contribution of Gaelic Games to the economy is assessed through the creation of a 'Satellite Account.' This technique, developed by the United Nations, is designed to measure the economic size of sectors not classified as distinct industries in National Accounts. Many EU countries have already implemented Tourism Satellite Accounts, and several have established a Sport Satellite Account (SSA). This current research on Gaelic Games marks the second application of this methodology to a specific sport in Ireland, following the Satellite Account for golf published in 2017. The research is timely as the three bodies are working towards the integration of Gaelic Games with a proposed merger date of 2027. Research of this type will enable the three parties to understand their economic and social value as they engage with wider stakeholders to enable the process of integration and the further development of all Gaelic Games.

The research aims are to:

- Outline the categories of the National Accounts in which Gaelic Games have a presence;
- Estimate consumer spending on Gaelic Games (using the Vilnius definition of sport);
- Estimate the Gross Value Added (GVA) per economic sector;
- Estimate employment per economic sector;
- Estimate turnover for the Gaelic Games industry;
- Estimate the indirect impacts of Gaelic Games in GVA, employment and turnover, and
- Contextualise the research relative to recent studies on the economic importance of sport<sup>1</sup>.

### PARTICIPATION IN GAELIC GAMES

Gaelic Games have a relatively high level of participation, especially among children and young people. For example, the participation rate of primary school children is 34% in community clubs, and 36% through schools (CSSPA, 2018). Among the adult (16+ population) there are no strong data evidence to establish an annual reliable estimate. A minimum participation base suggested in this report is the following:

Annual Participation	%
Republic of Ireland	7.0%
Northern Ireland	3.0%
All Ireland	6.6%

<sup>1</sup> <https://www.sportireland.ie/sites/default/files/media/document/2021-09/vos-report-final-19-07-21.pdf>

## METHODS

The methodological basis of the current research is the well-established Vilnius Definition of sport, which is in the process of revision at the European level. The revision reflects the changes of the Classification of Products by Activity<sup>2</sup> (CPA) codes as well as the changing landscape of the sport economy. The forthcoming update to the Vilnius Definition (Version 3.0) distinguishes between "characteristic goods" of sport and "connected goods" to align with Eurostat's requirements for Satellite Accounts.

In the context of Gaelic Games, the list of characteristic goods includes:

- Parts of Education services (CPA 85)
- 93.11: Sports facility operation services
- 93.12: Services of sports clubs
- 93.13: Services of fitness facilities
- 93.19: Other sporting services

All the other associated activities are classified as connected (e.g. manufacturing, retailing, tourism, etc.). The main part of the Satellite Account is concerned with the direct demand for Gaelic Games in terms of consumer spending, GVA, employment and turnover. As a further extension, the indirect economic impact of Gaelic Games is estimated together with the associated multipliers. Industries that create direct impacts depend on the supply of goods and services by other industries, which have to change their outputs to meet demand. These inter-industry transactions of intermediate goods and services represent the indirect impact and originate mainly from the supply network required for implementing direct demand, for example the raw materials required for construction projects.

## KEY FINDINGS

### *Consumer spending*

Consumer spending on Gaelic Games in Ireland was found to be €377 million, which is equivalent to €54 per head of population, or €65 per adult in Ireland. This is distributed between €345m in the Republic of Ireland and £28m in Northern Ireland. Admissions to live events represent the largest category of consumer spending on Gaelic Games in Ireland, totalling €63 million, which accounts for 17% of the overall spending. This figure is driven by the immense popularity of the Gaelic Games and the substantial membership base within sports clubs. Gaelic Games participation can be seen as a catalyst for economic activity in other sectors because of the additional expenditure participants make on items such as clothing, footwear, equipment, tourism, etc.

### *Gross Value Added (GVA)*

In 2022, the Gross Value Added (GVA) of the Gaelic Games industry on the island of Ireland reached €710 million, with the largest contribution coming from the education sector, as well as activities surrounding sports clubs, facilities, and other sporting activities classified as 'Characteristic goods' of the

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<sup>2</sup> The **CPA classification system** (Classification of Products by Activity) is a European Union classification standard used to categorise goods and services based on the economic activities that produce them. It aligns with the statistical needs of the EU, allowing for the systematic and harmonised reporting of economic data across member states. The CPA system links products to the sectors in which they are produced, enabling consistent comparisons of production, consumption, and trade statistics across countries.

industry. This was divided into €660 million for the Republic of Ireland and £43 million for Northern Ireland. This analysis also underscores the significant interconnections between Gaelic Games and other industries, particularly construction (€68 million or 9% of GVA), services (Digital, insurance, legal: €62 million or 9% of GVA), and accommodation/travel industries (€21 million). These sectors are associated with high multipliers and help Gaelic Games to produce more indirect effects, through the supply chain.

### Employment

The Gaelic Games industry supports approximately 10,600 jobs. This is divided into 9,500 jobs in the Republic of Ireland and 1,100 in Northern Ireland. Since the delivery and playing of Gaelic Games is strictly amateur, these jobs are not within the competitive structure of the Gaelic Games. Instead, the economic activity generated by Gaelic Games creates employment in associated industries such as education and retailing. Within this framework, education and sport activities (CPA 93.1) account for 4,400 jobs and 1,700 jobs, respectively, representing 41% and 16% of total employment associated with Gaelic Games. Construction continues to be a vital sector, generating 1,000 jobs, which corresponds to 9% of the Gaelic Games economy. This contribution, much like Gross Value Added, enhances the employment multiplier effect within the industry.

### Direct and Indirect effects and multipliers

The indirect effect is of economic importance because it measures the production of inputs required in order to satisfy the direct demand for Gaelic Games. These inputs are sourced through the supply network. The Table below shows the totality of GVA impacts of Gaelic Games. The overall impact is €1,003 million distributed into 71% direct impact and 29% indirect impact. The associated multipliers are 1.40 for the Republic of Ireland, 1.52 for Northern Ireland and 1.41 for the island of Ireland. This implies that an investment of €1m is expected to generate €1.41m GVA throughout the economy.

GVA impacts	Republic of Ireland		Northern Ireland		Total		%
	€m	share	£m	share	€m	share	
Direct impact	660	0.14%	42.9	0.08%	710	0.13%	71%
Indirect impact	266	0.06%	22.3	0.04%	293	0.05%	29%
Total impact	926	0.19%	65.2	0.12%	1,003	0.19%	100%
Multipliers	1.40		1.52		1.41		

The same analysis is repeated for employment. The Table below shows the totality of employment impacts of Gaelic Games. The overall impact is 14,000 jobs, distributed into 76% direct impact and 24% indirect impact. The associated multipliers are 1.32 for the Republic of Ireland, 1.35 for Northern Ireland and 1.32 for the island of Ireland.

Employment impact	Republic of Ireland		Northern Ireland		Total		%
	thousands	share	thousands	share	thousands	share	
Direct impact	9.5	0.36%	1.1	0.14%	10.6	0.31%	76%
Indirect impact	3.1	0.12%	0.4	0.05%	3.4	0.10%	24%
Total impact	12.6	0.48%	1.5	0.19%	14.0	0.41%	100%
Multipliers	1.32		1.35		1.32		

### The sporting and wider context

Gaelic Games play a highly significant role in the sport industry, accounting for 7.8% of sport related consumer spending, 8.7% of sport related Gross Value Added (GVA), and 9.8% of sport employment. The consumer spending figure is particularly noteworthy as it highlights the connection between participation in Gaelic Games and high-value economic activities such as club membership, equipment purchases, clothing, and tourism-related activities.

The GVA generated by Gaelic Games corresponds to 0.13% of the Irish economy (direct effect), or 0.19% (direct and indirect effects). In the case of Employment, the equivalent shares are higher, at 0.31% (direct impact) and 0.41% (direct and indirect impact). Finally, consumer spending, estimated at €377 million, is equivalent to 0.24% of total spending.

### Gaelic Games' contribution to taxation

Tax collectively contributes approximately €192.6 million annually to Central Government, as shown in Table below. This finding underscores the financial significance of Gaelic Games not only in promoting sport but also in supporting public finances. In comparison, the total value of grants allocated to Gaelic Games through the Capital Programme was €64 million.

Source	Public Sector Income RoI (€m)	Public Sector Income NI (€m)	Public Sector Income Total (€m)
Tax on consumption (VAT)	46.7	2.3	49.4
Tax on incomes	112.8	7.1	121.1
Tax on corporation profits	20.6	1.3	22.1
<b>Total</b>	<b>180.1</b>	<b>10.7</b>	<b>192.6</b>
<i>Gaelic Game Grants (Capital programme)</i>			64

### Policy relevance

The current research can help achieve targets that are at the centre of policies in both the Republic of Ireland and Northern Ireland. These include:

1. **Increase Participation:** The Republic of Ireland policy aims to raise overall participation in sport from 43% to 50% of the population by 2027, which translates to an additional 260,000 people engaging in sports.
2. **Facility Development,** at both national and local levels to support both participation and high-performance.
3. **Inclusivity and Equality:** Promoting gender balance and inclusivity in sports organisations is a priority, with initiatives aimed at achieving a better gender balance on the boards of funded sports bodies. The integration of the administration of Gaelic Games across all Units can help in this objective.



## CONCLUSION

The current Gaelic Games Satellite Account indicates that the Gaelic Games economy is an effective generator of employment, although not among the clubs, contributing significantly to both local and national economic sustainability. This feature positions Gaelic Games as a valuable tool for economic recovery during economic downturns. The variety of economic activities linked to Gaelic Games yields substantial benefits for the broader economy. The report highlights strong connections between Gaelic Games and sectors such as construction, business services, and tourism, all of which are associated with high GVA multipliers. The driving force behind the Gaelic Games economy is the network of clubs and sport education, supported by vibrant community engagement in sports.

Any increase in participation, particularly from new participants, is likely to impact positively on clubs and subsequently influence construction and tourism investments, thereby expanding the overall economic effects. Finally, the report demonstrates that Gaelic Games represent a secure avenue for public investment, generating approximately €192.6 million in revenue for the public purse in 2022.

Overall, the Satellite Account for Gaelic Games highlights the significant economic importance of the sport to the Irish economy. This report establishes a replicable baseline for the industry, which can be reassessed in the future and used as a benchmark for measuring the ongoing development of Gaelic Games. By providing detailed insights into employment, Gross Value Added (GVA), and contributions to public revenue, the account serves as a valuable tool for policymakers and stakeholders to gauge the economic impact of Gaelic Games over time. Such assessments can inform strategies aimed at enhancing participation and investment in the sector.

## 1. INTRODUCTION

### 1.1. The Project

The GAA has supported the Sport Industry Research Centre (SIRC) at Sheffield Hallam University in creating a 'Satellite Account' for Gaelic Games. This initiative aims to provide a comprehensive assessment of the economic value of the sport to the Irish economy for 2022. In this report, the term 'Irish economy' encompasses both the Republic of Ireland (RoI) and the six counties of Ulster that comprise Northern Ireland (NI). This project emerges in the aftermath of the COVID-19 pandemic, offering a crucial opportunity to evaluate the industry's status during the initial phase of normalisation.

Most nations employ an internationally standardised framework known as the System of National Accounts (SNA) to report the economic scale of industries. However, Gaelic Games are not recognised as a distinct industry within this framework. As a result, the economic activity associated with Gaelic Games becomes diluted within the National Accounts of Ireland and the National Accounts of the United Kingdom. The associated economic activity is categorised broadly under recognised industries such as recreation, arts and sport, manufacturing, construction, and hospitality.

The contribution of Gaelic Games to the economy is assessed through the creation of a 'Satellite Account.' This technique, developed by the United Nations, is designed to measure the economic size of sectors not classified as distinct industries in National Accounts. Many EU countries have already implemented Tourism Satellite Accounts, and several including the UK<sup>3</sup> have established a Sport Satellite Account (SSA). This current research on Gaelic Games marks the second application of this methodology to a specific sport in Ireland, following the Satellite Account for golf published in 2017<sup>4</sup>. Satellite Accounts analyse industries from multiple perspectives, providing a comprehensive view of their economic impact as outlined below.

- Consumer spending, which is defined as the spending of individuals and households on goods and services related to Gaelic Games.
- Gross Value Added (GVA), the building blocks of the National Accounts, is defined as the profits plus wages within an industry, less an adjustment for taxation and subsidies. GVA is usually more than 90% of Gross Domestic Product (GDP), the key measure of the scale of an economy.
- Employment, which is reported as number of jobs in the economy.

A fourth, less commonly used measure is turnover, which reflects the revenue flows associated with a specific level of Gross Value Added (GVA). To generate €1,000 in wages and profits, a business may require a turnover of €1,800. This relationship is apparent in the Input Output Tables of each country or can be estimated by applying a multiplier to GVA based on the National Accounts.

The fifth indicator examined in this report is the revenue or cost of Gaelic Games to the public purse. This measure considers any income generated through taxes on consumption, personal income, and corporate profits.

The year of the Satellite Account for Gaelic Games coincides with the beginning of the GAA's Strategic Plan for 2022-2026<sup>5</sup>, which outlines the key objectives for the Association over the next five years

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<sup>3</sup> [Sport Satellite Account for the UK 2024: Key findings - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/sport-satellite-account-for-the-uk-2024-key-findings)

<sup>4</sup> [Consumers spend €540m a year on golf in Ireland, research shows – The Irish Times](https://www.irishtimes.com/sport/gaelic-games/consumers-spend-540m-a-year-on-golf-in-ireland-research-shows-1.4648444)

<sup>5</sup> <https://www.gaa.ie/the-gaa/administration/strategic-plan>

including maximising participation, sustainability, and inclusivity within the sports community. This Satellite Account can support these goals by fostering a more productive and sustainable sports sector while informing governance in sports. Regular monitoring of the economic significance of Gaelic Games aligns with the objective to increase participation—recognised as the primary driver of the sector's economic impact. Furthermore, an objective assessment of Government revenue generated from the sport can optimise funding allocation to local economies and facilities, adhering to principles of good governance.

Gaelic Games encompass six distinct sports: Hurling, Gaelic Football, Handball, Rounders, Camogie, and Ladies Football. The first four sports are governed by the GAA, while Camogie and Ladies Football fall under the auspices of the Camogie Association and Ladies Gaelic Football Association respectively. This structure reflects the unique characteristics and governance of each sport within the broader Gaelic Games framework currently.

The research is timely as the three bodies are working towards the integration of Gaelic Games with a proposed merger date of 2027. Research of this type will enable the three parties to understand their economic and social value as they engage with wider stakeholders to enable the process of integration and the further development of all Gaelic Games.

## **1.2. Research Aims**

The aim of this research is to evaluate the economic impact of Gaelic Games on the island of Ireland by following the standard methodology of Satellite Accounts (as developed in the EU) and to map the Gaelic Games 'industry' against standard economic categories (National Accounts) in order to:

- Outline the categories of the National Accounts in which Gaelic Games have a presence;
- Estimate consumer spending on Gaelic Games (using the Vilnius definition of sport);
- Estimate the Gross Value Added (GVA) per economic sector;
- Estimate employment per economic sector;
- Estimate turnover for the Gaelic Games industry;
- Estimate the indirect impacts of Gaelic Games in GVA, employment and turnover, and
- Contextualise the research relative to the recent study on the economic importance of sport<sup>6</sup>.

## **1.3. Report Structure**

The rest of the report is structured as follows:

- Section 2 addresses the topic of participation in Gaelic Games;
- Section 3 outlines the methods;
- Section 4 identifies the Standard Economic Categories associated with Gaelic Games in Ireland;
- Sections 5 to 7 provide estimates for consumer spending, GVA and employment;
- Section 8 presents an estimate of the turnover together with the indirect effects;

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<sup>6</sup> <https://www.sportireland.ie/sites/default/files/media/document/2021-09/vos-report-final-19-07-21.pdf>

- Section 9 presents the indirect effects on GVA, employment and turnover;
- Section 10 summarises the economic impact of Gaelic Games and positions it within the context of the sport industry and the Irish economy as a whole;
- Concluding comments are presented in section 11; and,
- The Appendices include detailed tables on the Standard Industrial Classification (SIC) mapping of the Gaelic Games industry; consumer spending; GVA; employment; and turnover.

## 2. PARTICIPATION IN GAELIC GAMES

### 2.1. Introduction

To estimate both the economic and social value of Gaelic Games, it is necessary to have accurate data about the number of people who participate in the various sports and who benefit from the various outcomes associated with them. The word ‘participation’ has numerous uses in this context, notably: playing or training in all its forms; playing or training to a level of physical activity that leads to a health benefit; volunteering in its many forms such as coaching, administration, club operations and general ‘helping out’; club membership; and spectating at live events.

These measures are to an extent captured via the Irish Sports Monitor (ISM), which is a biennial survey commissioned by Sport Ireland since 2007. However, the ISM is concerned with measuring general levels of sport and physical activity, with a particular emphasis since 2017 on those meeting the Health Service Executive’s National Physical Activity Guidelines (NPAG<sup>7</sup>). The ISM publication provides some indicative data on participation rates in specific sports and activities, especially those that are more popular. However, there are limitations to the value of ISM data for assessing participation in specific sports or groups of sports such as Gaelic Games, as outlined below.

### 2.2. Limitations of the ISM survey

The ISM is a robust survey carried out to the highest methodological standards, that provides insight into the proportion of the adult population (16+) of Ireland who take part in sport and physical activity and who achieve the NPAG. In addition, it measures volunteering, club membership and spectating. Our review of its limitations is not a criticism of ISM, rather a recognition that it serves a particular purpose, and that purpose does not lend itself accurately to measuring the various notions of participation in Gaelic Games that we need for our study.

The ISM is concerned with participation in sport and physical activity in the Republic of Ireland and therefore excludes Northern Ireland. In Northern Ireland, participation is measured using the Continuous Household Survey (CHS). Given that Gaelic Games is organised on an all-Ireland basis, there is no single source of data on the island of Ireland that provides accurate data on engagement in Gaelic Games in its various forms.

The ISM and CHS focus on adult participation (ages 16+) and exclude children and youth aged 1-15. Participation among these younger groups was partially captured in the 2018 Children’s Sport Participation and Physical Activity Survey (CSSPA), which targeted those aged 10-19 in school, across the island of Ireland. However, since the CSSPA predates the COVID-19 pandemic—known to have altered sports and physical activity habits—it may not provide accurate contemporary data. The CSSPA’s age range overlaps with the ISM for ages 16-19, complicating comparisons, as CSSPA only includes those in school while ISM encompasses all individuals in that age group. Nonetheless, the CSSPA offers

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<sup>7</sup> Guidelines for adults (aged 18–64): At least 30 minutes a day of moderate intensity activity, five days a week (or 150 minutes a week).

Guidelines for older people (aged 65+): At least 30 minutes a day of moderate intensity activity, five days a week (or 150 minutes a week). Focus on aerobic activity, muscle strengthening and balance.

valuable insights into participation levels in Gaelic Games across the island of Ireland, as summarised in the Table 2.1 below.

**Table 2.1: Participation rates in Gaelic Games (all-Ireland), school children 10-19, 2018**

Setting	Primary School	Post Primary School
<b>Community sports club</b>		
Gaelic football	34%	32%
Hurling / Camogie	21%	18%
Handball	2%	3%
Baseball / Rounders*		
<b>In school</b>		
Gaelic football	36%	25%
Hurling / Camogie	22%	18%
Handball	6%	3%
Baseball / Rounders*	11%	3%
<b>Content of PE lessons</b>		
Gaelic football	57%	26%
Hurling / Camogie	36%	9%
Handball	19%	26%
Baseball / Rounders*	42%	45%

Source: CSSPA 2018

\* There is no assumption that these labels refer exclusively to the Gaelic Games version of each sport.

Looking at the island of Ireland as a whole, roughly one third of young people aged 10-19 took part at least once in the last 12 months in Gaelic football in a community sports club setting. For Hurling and Camogie, the corresponding statistic is around a fifth. Similar figures are apparent for in school participation. The key point of note here is that children and young people are an important part of the Gaelic Games' 'market' and their value should not be underestimated or indeed ignored, as it is via national surveys of adults.

Whilst Table 2.1 looks at all-Ireland participation rates, Chapter 7 of the CSSPA 2018 report details participation rates in Northern Ireland for primary and post-primary combined, which not surprisingly are considerably lower than the all-Ireland averages, as shown in Table 2.2.

**Table 2.2: Participation rates in Gaelic Games (Northern Ireland), school children, 10-19, 2018**

Setting	Gaelic football	Hurling	Camogie	Handball*	Baseball / Rounders*
Community sports club	11%	3%	4%	3%	3%
In school	12%	3%	2%	5%	11%
Content of PE lessons	21%	6%	4%	17%	50%

Source: CSSPA 2018,

\* There is no assumption that these labels refer exclusively to the Gaelic Games version of each sport.

Whilst one in five 10–19-year-olds in Northern Ireland experienced Gaelic Football in PE lessons, overall levels of participation in Gaelic Games are significantly lower than the all-Ireland data.

### 2.3. Time reference period

The ISM asks respondents about their participation in the last seven days. This approach makes sense for calculating the proportion of people who achieve the NPAG, but it is not a reliable measure for calculating the total number of people who take part in a specific sport. We make this assertion because some people will play less frequently than in the last seven days; some people may be ill, injured or on holiday; there are seasonal variations in participation; and weather can be a limiting factor, particularly in winter. Other surveys e.g. Sport England's Active Lives survey use longer time frames such as participating twice in the last four weeks and at least once in the last year.

Allowing for these points, the 2022 edition of the ISM reports an adult participation rate in Gaelic Football of approximately 2.5%, surpassing pre-pandemic levels (2.0% in 2015, 2.2% in 2017, and 2.4% in 2019). This latest measure reflects a consistent upward trend in participation rates over time. The population of the Republic of Ireland (the jurisdiction in which ISM is conducted) was 5.184m in 2022 according to the Central Statistics Office and 4.087m of these were aged 16+. Applying the participation rate of 2.5% for Gaelic Football gives an estimate for adult players of 102,175 who played in the last seven days. The adult participation rates for Hurling and Camogie are not reported in the ISM because they do not appear in the top 10 most popular sports, although this analysis is possible from the raw data set (not available yet in the ISSDA archives). Previous research we conducted for Sport Ireland shows a combined participation rate for Hurling and Camogie of 1.1%, which if replicated in 2022 would result in 44,957 adult players who had played in the last seven days. It is important to note that the ISM reports on participation in sports and physical activities for individuals aged 16 and older. The figures presented reflect the percentage of the total population in this age group, rather than focusing solely on those within the primary competitive sports participation age range of up to 35 or 40 years. This distinction is crucial for understanding the broader context of sports engagement across different age demographics.

The GAA, LGFA, and CA are reported to have a total membership of c. 800,000 people and would look upon the ISM estimates as a severe underestimate of the level of participation in its sports. The GAA's annual report<sup>8</sup> for 2022 details that it has 20,944 registered teams. If each team has on average 20 players allowing for substitutions and player rotation, then there would be 419,880 players registered for Gaelic Football and Hurling. Even allowing for what the ISM identifies as a 25% overlap between players playing both games, we would still expect there to be about **315,000 unique players**. This means that the participation rate in Ireland is at least 5.5% among the adult population

The relevance of the time reference period can be appreciated by looking at participation rates in Northern Ireland's Continuous Household Survey, which asks if people have taken part in a list of sports in the last 12 months. Using the 12 months' reference period, participation in all Gaelic Games in Northern Ireland has a participation rate of **3%** according to the 2022/23 CHS. It is improbable that Northern Ireland would have a comparable participation rate in Gaelic Games to the Republic of Ireland. The point of note is that the time reference period of seven days versus 12 months makes a big difference to the participation rates reported by surveys.

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<sup>8</sup> <https://www.gaa.ie/downloads/viewer/14373-gaa-annual-report-2022>

By incorporating raw data from the most recent available year in the Archives (2019), we identified a relationship between participation in all Gaelic Games and participation specifically in Gaelic Football and Hurling, represented by a factor of **1.2**. Applying this factor to the previously mentioned statistics allows us to estimate minimum values for the annual participation rates in Gaelic sports. These participation rates are illustrated in Table 2.3 below.

**Table 2.3: Gaelic Games annual participation rates, adults, 2022**

	%
Republic of Ireland	7.0%
Northern Ireland	3.0%
All Ireland	6.6%

Source: ISM, CHS, GAA accounts, SIRC,

It is important to note that the Table above includes all Gaelic Games, not just Football and Hurling. According to Table 2.3, if we assume the estimate provided in the CHS for Gaelic Games participation in Northern Ireland is accurate, we can conclude that the annual participation rate is approximately **6.6%** for the entire island of Ireland and approximately **7%** for the Republic of Ireland. It is important to note that these figures are likely minimum estimates due to the conservative nature of the calculations involved.

If similar thinking is applied to other forms of engagement in Gaelic Games the ISM 2022 data show that:

- 4% of the adult population took part in voluntary activity in the last seven days to support Gaelic Football, Hurling or Camogie;
- 7% of the adult population had attended a Gaelic Football match in the last seven days, with the corresponding statistic for Hurling and Camogie being 3%;
- 31% of the adult population described themselves as being a member of a sports club at the time of their interview (no time period specified);
- 10% of the adult population described themselves as being a member of a 'GAA' club; and
- Gaelic Football has the highest proportion of participants who are club members (88%).

The net effect is that any measures of actual participation or social participation that are based on a seven-day recall, are likely to underestimate the true scale of participation in any sport, using the ISM. The SSA required establishing an estimate of the share of sport within various economic activities and, subsequently, the share of Gaelic sports within the overall sports sector.



## 3. METHODS

### 3.1. The Vilnius Definition of the 'sport economy'

To understand the economic impact of sport, it is essential to begin with a clear definition of sport and physical activity (PA) as forms of economic activity. While we will not delve into a specific definition here, it is important to recognise that this economic dimension extends beyond just the direct costs of participating in sports—such as purchasing athletic clothing and footwear. It also encompasses ancillary activities such as sports journalism, sports betting, video gaming, and e-sports. These broader aspects are included in the Vilnius Definition of sport, which serves as the foundation for all sports Satellite Accounts within the EU. This comprehensive approach allows for meaningful comparisons to be made between the Irish sports economy and other European economies, enabling reliable conclusions about the sector's growth and development.

The well-established Vilnius Definition of sport 2.0 is in the process of revision into Vilnius 3.0 at the European level. The revision reflects the changes of the Classification of Products by Activity<sup>9</sup> (CPA) codes as well as the changing landscape of the sport economy with new items such as e-bikes and e-sports. The forthcoming update to the Vilnius Definition (Version 3.0) distinguishes between "characteristic goods" of sport and "connected goods" to align with Eurostat's requirements for Satellite Accounts. According to the European System of Accounts (ESA) handbook, the revised Vilnius Definition will now be compatible with methodologies used in Tourism Satellite Accounts and Environmental Satellite Accounts.

In the sport context, the distinction between characteristic and connected goods hinges on the presence of sport participation within a category. For instance, CPA code 93.1 (sport services) is included as it pertains to the operation of sport and fitness clubs. Similarly, many aspects of education that encourage children's participation in sport are included.

The list below presents the characteristic products for the sport industry in the context of Ireland:

Sport Services (CPA Code 93.1):

93.11: Sports facility operation services

93.12: Services of sports clubs

93.13: Services of fitness facilities

93.19: Other sporting services

Education:

85.1: Pre-primary education services

85.2: Primary education services

85.31: General secondary education services

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<sup>9</sup> The **CPA classification system** (Classification of Products by Activity) is a European Union classification standard used to categorise goods and services based on the economic activities that produce them. It aligns with the statistical needs of the EU, allowing for the systematic and harmonised reporting of economic data across member states. The CPA system links products to the sectors in which they are produced, enabling consistent comparisons of production, consumption, and trade statistics across countries.

85.32: Technical and vocational secondary education services

85.42: Tertiary education services

85.51: Sports and recreation education services

85.52: Cultural education services (including dancing schools and instructors)

85.53: Driving school services (including flying and sailing schools)

85.60: Educational support services

The current report is based on the latest revised Vilnius Definition 3.0 (under development at the time of writing), and the revised pan-European methodology agreed in the EU. This research represents the first occasion in which Vilnius Definition 3.0 has been used on the island of Ireland.

### **3.2. The Model**

Our analysis is consistent with the Vilnius Definition of sport, which articulates the consensus reached at European Union level. The research presented in this report uses the nine key sources listed below as its basic inputs.

1. Examination of the commercial sector through the annual financial statements of sport-related businesses filed with the Companies Registration Office and Companies House (examined through the Financial Analysis Made Easy (FAME) database).
2. Analysis of clubs' finances through annual financial statements.
3. The trade of goods as reported by the Central Statistics Office (CSO).
4. Annual financial statements for governing bodies (GAA, LGFA, CA), Provinces, Counties, associations and charities.
5. Household Budget surveys.
6. The Input-Output Tables for the national economies, together with average earnings data provided by the Annual Survey of Hours and Earnings and CSO.
7. Previous research on Gaelic Games and the sport industry such as the Irish Sport Monitor.
8. The Prodocom dataset which can identify the manufacturing (or not) of several sport related items.
9. The recently published report of the UK and national SSAs by DCMS.

The major difference between this study and previous evaluations is that it uses the direct derivation of GVA as the basis of its calculations. GVA is specific to the individual industry sectors and calculating it on this basis is more accurate than trying to derive it on the basis of turnover using generic conversion factors.

In addition to the direct economic impact, the indirect effects on Gross Value Added (GVA) and employment are also calculated. The multipliers utilised in this analysis, derived from the Leontief Type I matrix, are based on the latest analytical Product-by-Product Tables provided by the Central Statistics Office (CSO) and the newly established national accounts for Northern Ireland. This comprehensive

approach ensures that both direct and indirect contributions of sport to the economy are accurately assessed, facilitating a more nuanced understanding of the sector's overall economic impact.

### **3.2. Output Impacts**

The main part of the Satellite Account is concerned with the direct demand for Gaelic Games in terms of consumer spending, GVA, employment and turnover. As a further extension, the overall economic impact of Gaelic Games combines two different types of effect, which reflect the way in which expenditure filters through an economy.

- Direct impact - the immediate net change in economic activity in the sectors of the economy that service Gaelic Games, such as tourism-related services. The sectors contributing to direct impact are identified by the Vilnius Definition of sport
- Indirect impact - industries that create direct impacts depend on the supply of goods and services by other industries, which have to change their outputs to meet demand. These inter-industry transactions of intermediate goods and services represent the indirect impact and originate mainly from the supply network required for implementing direct demand, for example the raw materials required for construction projects.

Overall, the current methodology provides an evaluation of the Gaelic Games industry in terms of consumer spending, GVA and employment using an approach that meets the quality thresholds of government statistics. Perhaps most importantly, the approach is transparent and can be reconciled with the National Accounts from which they are drawn.

## 4. MAPPING THE GAELIC GAMES INDUSTRY

Part of the research process for constructing a Satellite Account involves a direct search through the Standard Industrial Classification (SIC) codes to identify companies that are associated with Gaelic Games. This was conducted by using the annual reports, financial statements, and associated four-digit SIC codes filed with the Companies Registration Office Ireland and Companies House (UK). A full list of the four-digit SIC codes that we found to be directly related to the Gaelic Games industry can be found in the Appendices (see Table A.1). Following a general search, we restricted our scope to the codes that are recognised by the Vilnius Definition 3.0 of sport as being sport related.

The first observation about this analysis is that the Gaelic Games industry spans a large number of industrial sectors and SIC codes as shown in Table 4.1. Gaelic Games demonstrate a particularly strong integration with Section P: Education, and Section I: Accommodation and Food Service Activities, with Gaelic Games-related businesses represented in **73%** of the Standard Industrial Classification (SIC) codes for the education sector and **63%** for accommodation and food services. This finding underscores the significant role that Gaelic Games play in these sectors, highlighting their impact on both education and local economies. Section I includes companies such as hotels, food service activities, restaurants, clubs, bars and public houses. Section J: Information and Communications also has a strong presence with 43% of four-digit codes featuring businesses related to Gaelic Games, and it is the one sector that has grown in recent years reflecting broader industrial and societal trends.

*Table 4.1: Economic Sectors with strong associations with Gaelic Games*

Group	Percentage of four digit SIC codes associated with Gaelic Games
Section P: Education	73
Section I: Accommodation and Food Service Activities	63
Section J: Information and Communication	46
Section R: Arts Entertainment and Recreation	43
Section G: Wholesale & Retail Trade; Repair of Motor Vehicles & Motorcycles	29
Section M: Professional Scientific and Technical Activities	25
Section F: Construction	20
Section S: Other Service Activities	11
Section N: Administrative and Support Service Activities	9
Section C: Manufacturing	6
Section K: Financial and Insurance Activities	6

The extensive interaction of Gaelic Games with the broader economy suggests relatively high values for the multipliers used to calculate indirect effects. As a result, Gaelic Games have the potential to influence multiple sectors of the economy and maximise the benefits through strategic investment. This initial analysis lays the groundwork for the key indicators of consumer spending, Gross Value Added, and employment, which will be detailed in the following sections.

## 5. CONSUMER SPENDING

Consumer spending on Gaelic Games in Ireland was found to be €377 million as shown in Table 5.1 below, which is equivalent to €54 per head of population, or €65 per adult in Ireland. This is distributed between €345m in the Republic of Ireland and £28m in Northern Ireland.

*Table 5.1: Summary of Consumption, 2022, island of Ireland*

Expenditure Type	Spending ROI (€ m)	Spending NI (£m)	Total (€m)	Percentage
Live Events	57	5	63	17%
Education	52	2	54	14%
Sport equipment	43	2	46	12%
Sport goods in general stores	32	1	33	9%
Food, drinks, and catering	31	2	34	9%
Clothing & Footwear	28	5	33	9%
Accommodation / travel	23	1	24	6%
Members' Fees	17	4	21	6%
Betting	9	1	10	3%
Other	53	5	59	16%
<b>Total</b>	<b>345</b>	<b>28</b>	<b>377</b>	<b>100%</b>

Admissions to live events represent the largest category of consumer spending on Gaelic Games in Ireland, totalling €63 million, which accounts for 17% of the overall spending. This figure is driven by the immense popularity of Gaelic Games and the substantial membership base within sports clubs, which itself contributes, in terms of membership fees, €21 million, or 6% of total Gaelic Games-related expenditure in Ireland. Additionally, household spending on education is notably high at €54 million, largely due to the significant amount of time children spend in schools participating in Gaelic Games. While government-funded education is not included in consumer spending, both the Input-Output Table and Consumer Surveys indicate a considerable level of expenditure on fees and coaching.

Participation in Gaelic Games serves as a catalyst for economic activity in various sectors, as participants increase their spending on sports equipment, clothing, and footwear. Specifically, spending in the sports equipment market amounts to €46 million, while expenditure on clothing and footwear reaches €33 million, corresponding to 12% and 9% of total consumer spending on Gaelic Games, respectively. Beyond promoting individual physical and mental health benefits, there are compelling arguments for the broader economic advantages of the sport. These economic benefits are maximised by attracting new participants and enhancing integration with other economic activities, as discussed in Chapter 3 (Mapping the Industry).

Gaelic Games are prominent in the consumer spending figures for sport overall. As shown in Table 5.2, Gaelic Games are responsible for 7.8% of the €4.8 billion<sup>10</sup> spent by consumers on sport.

Overall, Gaelic Games generates consumer spending equivalent to 0.24% of the total spending in the island of Ireland. These figures vary between the Republic of Ireland and Northern Ireland. The former has a share of 0.28% in the overall spending, while the latter a share of 0.11%.

<sup>10</sup> SIRC estimate based on the 2018 and 2022 headline values of Ireland's Consumer spending. These should be treated with caution.

**Table 5.2: Gaelic Sport Consumption - In Context, 2022**

	<b>Republic of Ireland</b>	<b>Northern Ireland</b>	<b>Total (€m)</b>
Gaelic Games Consumption	€345 million	£28 million	€377 million
Sport Consumption (based on RoI 2018 data and the latest UK SSA)	€3,869 million	£813 million	€4,820 million
Gaelic Games as a percentage of Sport Consumption	8.9%	3.4%	7.8%
Gaelic Games as a percentage of total Consumption	0.28%	0.11%	0.24%

## 6. GROSS VALUE ADDED

In 2022, the Gross Value Added (GVA) of the Gaelic Games industry on the island of Ireland reached €710 million, with the largest contribution coming from the education sector, as well as activities surrounding sports clubs, facilities, and other sporting activities classified as 'Characteristic goods' of the industry. This was divided into €660 million for the Republic of Ireland and £43 million for Northern Ireland.

Education alone generated €225 million in GVA, accounting for 32% of the total GVA associated with Gaelic Games (all Ireland). The construction sector contributed €68 million (9%), while services—including digital communication, information technology, insurance, and legal activities—generated €62 million (9%). Additionally, activities related to sports clubs, various other sports, and the operation of sports facilities collectively contributed €61 million, representing 9% of the overall GVA. This analysis underscores the significant interconnections between Gaelic Games and other industries, particularly construction (€68 million or 9% of GVA) and accommodation/travel industries (€21 million).

**Table 6.1: Summary of GVA**

Sector	GVA RoI (€ m)	GVA NI (£ m)	GVA Total (€ m)	Percentage
Education	211.7	11.2	224.8	32%
Services (Digital, Information, Insurance, Legal)	61.9	0.4	62.4	9%
Construction	59.0	7.3	67.5	9%
Magazines / Books / Newspapers/TV	45.6	2.2	48.1	7%
Manufacturing	36.3	0.7	37.1	5%
Sport Equipment / Sportswear	35.8	4.8	41.4	5%
Medical activities	25.9	1.1	27.2	4%
Operation of sport facilities	25.9	2.8	29.2	4%
Other Sport Activities	25.6	1.5	27.4	4%
Management and Administration	25.0	2.4	27.8	4%
Accommodation / Tourism	18.7	1.6	20.6	3%
Wholesale	13.6	1.3	15.2	2%
Food, drinks and catering	12.8	1.6	14.7	2%
Betting	12.2	1.3	13.8	2%
Activities of Sport Clubs	3.7	0.5	4.4	1%
Other	46.4	2.1	48.9	7%
<b>Total</b>	<b>660</b>	<b>42.9</b>	<b>710</b>	<b>100%</b>

Table 6.2 contextualises the Gross Value Added generated by Gaelic Games, revealing that the two primary sectors of characteristic goods—sport services and education—account for 40% of the total GVA. This highlights the significance of the active participation element in generating added value. The participation of children through schools and community clubs confirms this evaluation. As stated in chapter 2, the participation rates of primary school children in Ireland are as high as 34% and 36% in community clubs and in schools respectively.

The construction industry plays a crucial role in direct economic effects, suggesting that Gaelic Games benefit from high multipliers when interacting with other sectors. If participation in Gaelic Games can be increased—a highly feasible proposition, given the investment in education—the resulting economic

benefits could be substantial, both directly through Gaelic Games and indirectly through positive impacts on sectors with high GVA multipliers, such as construction.

Finally, Table 6.2 offers a high-level estimate of the Gross Value Added generated by the sports economy in the island of Ireland, derived from historical data and GVA growth trends. It is estimated that the GVA generated by Gaelic Games accounts for approximately 8.7% of the total GVA produced by the sport industry and 0.13% of the overall GVA in Ireland. This is divided into 0.14% for the Republic of Ireland and almost 0.1% for Northern Ireland. The shares of the contribution made by Gaelic Games into the sport economy are 9.8% and 3.5% for the Republic of Ireland and Northern Ireland respectively.

**Table 6.2: Gaelic Games GVA - In Context**

	Republic of Ireland	Northern Ireland	Total
Gaelic Games GVA	€ 660 million	£43 million	€ 710 million
Gaelic Games Characteristic GVA	40%	37%	40%
Gaelic Games Connected GVA	60%	63%	60%
Sport GVA (2022, SIRC estimate based on GVA growth)	€ 6,748 million	£1,216 million	€ 8,171 million
Gaelic Games GVA as a percentage of Sport GVA	9.8%	3.5%	8.7%
Gaelic GVA as a percentage of Total GVA	0.14%	0.08%	0.13%



## 7. EMPLOYMENT

Data from the Labour Force Survey and Eurostat were utilised to estimate employment across various economic sectors. As illustrated in Table 7.1, the Gaelic Games industry supports approximately 10,600 jobs. This is divided into 9,500 jobs in the Republic of Ireland and 1,100 in Northern Ireland. The delivery and playing of Gaelic Games is strictly amateur and we are not implying that these jobs are within Gaelic Games. What we mean is that the economic activity generated by Gaelic Games creates employment in associated industries such as education and retailing. Within this framework, education and sport activities (CPA 93.1) account for 4,400 jobs and 1,700 jobs, respectively, representing 41% and 16% of total employment associated with Gaelic Games.

Construction continues to be a vital sector, generating 1,000 jobs, which corresponds to 9% of the Gaelic Games economy. This contribution, much like Gross Value Added, is expected to enhance the employment multiplier effect within the industry. Additionally, notable employment levels are found in the sports equipment and sportswear sectors (500 jobs), as well as in accommodation and tourism (500 jobs).

**Table 7.1: Summary of Gaelic Games Employment**

Sector	Employment RoI thousands	Employment NI thousands	Employment Total thousands	%
Education	4.0	0.4	4.4	41%
Construction	0.9	0.1	1.0	9%
Other Sport Activities	0.7	0.1	0.8	8%
Operation of sport facilities	0.5	0.1	0.6	6%
Sport Equipment / Sportswear	0.4	0.1	0.5	5%
Accommodation / Tourism	0.5	0.0	0.5	5%
Food, drinks and catering	0.2	0.1	0.3	3%
Management and Administration	0.3	0.0	0.3	3%
Services (Digital, Information, Insurance, Legal)	0.2	0.0	0.2	2%
Betting	0.2	0.0	0.2	2%
Manufacturing	0.2	0.0	0.2	2%
Medical activities	0.2	0.0	0.2	2%
Activities of Sport Clubs	0.1	0.0	0.1	1%
Wholesale	0.1	0.0	0.1	1%
Magazines / Books / Newspapers/TV	0.1	0.0	0.1	1%
Other	0.9	0.1	1.0	9%
<b>Total</b>	<b>9.5</b>	<b>1.1</b>	<b>10.6</b>	<b>100%</b>

To provide context for Gaelic Games employment, it is beneficial to examine the relationship between Gross Value Added and employment, as presented in Table 6.2. The overall contributions of Gaelic Games to GVA and to employment are estimated at 0.13% and 0.31% showing that investing on the sport may be an efficient generator of employment. It is important to note that many of these jobs may be part-time, particularly within the sports services sector.

This analysis allows us to assess the significance of generated employment within the broader sport economy. According to estimates based on previous reports and employment trends, employment related to Gaelic Games accounts for 9.8% of the total sport economy and approximately 0.31% of

overall employment in Ireland. The corresponding figures for the Republic of Ireland are 11.5% and 0.36% respectively, while for Northern Ireland they are 4.2% and 0.14%.

Approximately 56% of employment in Gaelic Games is generated within the characteristic services of education and sports services, highlighting the significance of the active sector in the industry. This emphasises the critical role that participation and engagement play in driving economic activity and job creation within Gaelic Games

**Table 7.2: Gaelic Games Employment - In Context**

	<b>Republic of Ireland</b>	<b>Northern Ireland</b>	<b>Total</b>
Gaelic Games employment	9,500	1,100	10,600
Gaelic Games characteristic employment	56%	53%	56%
Gaelic Games connected employment	44%	47%	44%
Sport Employment (2022, SIRC estimate based on employment growth)	82,330	26,400	108,700
Gaelic Games employment as a percentage of sport employment	11.5%	4.2%	9.8%
Gaelic Games employment as a percentage of total employment	0.36%	0.14%	0.31%

## 8. TURNOVER

Turnover, or the total economic activity associated with Gaelic Games is synonymous with output and is the basis for calculating GVA. It shows the total value of production or sales generated by the sport industry, encompassing ticket sales, merchandise, broadcasting rights, sponsorships, and other revenue streams specific to sports activities. It is an indicator of total economic activity and sometimes it may be twice the size of the gross value. For this report, the turnover (or output) values were taken from Input Output Tables and from Eurostat. The results are shown in Table 8.1. Gaelic Games generate €1,619 million of output, divided into the Republic of Ireland (€1,523 million) and Northern Ireland (£96 million).

**Table 8.1: Gaelic Games Turnover**

Sector	Turnover Rol (€ m)	Turnover NI (£m)	Turnover Total (€ m)	%
Construction	241.8	26.4	272.6	17%
Education	239.8	8.9	250.2	15%
Services (Digital, Information, Insurance, Legal)	218.7	9.4	229.7	14%
Magazines / Books / Newspapers/TV	146.8	4.1	151.6	9%
Manufacturing	119.6	6.9	127.7	8%
Sport Equipment / Sportswear	76.5	3.8	81.0	5%
Wholesale	53.2	2.5	56.2	3%
Accommodation / Tourism	49.2	2.6	52.2	3%
Medical activities	47.1	2.2	49.7	3%
Other Sport Activities	45.0	3.0	48.5	3%
Operation of sport facilities	45.4	2.4	48.2	3%
Management and Administration	36.7	2.2	39.3	2%
Betting	21.4	1.0	22.6	1%
Food, drinks and catering	21.0	1.2	22.4	1%
Other	160.8	6.6	167.4	10%
<b>Total</b>	<b>1,522.9</b>	<b>96.3</b>	<b>1619.2</b>	<b>100%</b>

In terms of turnover, the construction industry exhibits the greatest direct effect of a single CPA code, generating €273 million, followed closely by education at €250 million and sports activities (CPA 93.1) at €108 million. These sectors contribute 17%, 15%, and 7% to the total effect, respectively. Additionally, the digital and information services sector—including insurance and legal services—has a notable turnover of €219 million, which corresponds to 14% of the total direct effect. This highlights the significant economic impact of these industries within the broader context of Gaelic Games. Other than these sizable sections, the total effect is distributed among many economic activities as illustrated in Table 8.1 and in bigger detail in the Appendix.

Table 8.2 places these results in context. The characteristic goods are associated with 21% of the generated turnover, whilst the remaining 79% is associated with connected goods. This is reasonable as the connected goods require raw materials and capital not necessary in many aspects of education and sport services. Further, Gaelic Games are associated with 10.2% of the sport economy output in Ireland, divided into 11.6% for the Republic of Ireland, and 4.2% for Northern Ireland. The overall share for the contribution of Gaelic Games in the economy in Ireland is 0.15%, divided into 0.16% in the Republic of Ireland and 0.10% in Northern Ireland.

**Table 8.2: Gaelic Games, Turnover-in Context**

	<b>Republic of Ireland</b>	<b>Northern Ireland</b>	<b>Total</b>
Gaelic Games turnover	€1,523 million	£96 million	€1,619 million
Gaelic Games characteristic turnover	22%	15%	21%
Gaelic Games connected turnover	78%	85%	79%
Sport turnover (2022, SIRC estimate based on turnover growth)	€13,163 million	£2,310million	€15,866 million
Gaelic Games turnover as a percentage of sport turnover	11.6%	4.2%	10.2%
Gaelic Games turnover as a percentage of total turnover	0.16%	0.10%	0.15%

## 9. INDIRECT EFFECTS AND MULTIPLIERS

The current report evaluates both the traditional direct impact of sport on gross value added (GVA), turnover and employment, as well as the indirect impact generated through the broader supply network, much of which lies outside the sport economy. This report undertakes a detailed construction of sport specific multipliers, providing a more comprehensive analysis of the sector's wider economic impacts.

The indirect effect is of economic importance because it measures the production of inputs required in order to satisfy the direct demand for Gaelic Games. These inputs will be sourced from the commercial non-sport sector. For example, a club may run a bar and catering service, which in turn will require orders for food and drink to be placed down the supply chain for the required inputs. The sum-total of direct and indirect effects can be said to be a measure of the economic activity associated with Gaelic Games.

The indirect effects are associated with the calculation of multipliers. Multipliers are a commonly used indicator in input-output analysis, derived from gross value-added output and employment data. They are calculated as the ratio of total effects (direct plus indirect) to direct effects. Thus, a GVA-multiplier of 1.5 means that for every €1 of GVA generated in the directly sport-related companies, another €0.50 of GVA is generated in the supply-network of these companies.

A sector with a high multiplier is often interpreted as being well connected to the rest of the economy. On the other hand, low multipliers are often considered to be the sign of a sector heavily reliant on imports. However, it is also possible that a sector produces most of the goods and services it needs on its own, e.g. a farm using part of the harvest of one year as seeds for next year. The value of a multiplier should therefore be interpreted carefully. Multipliers of sport-related sectors are often found to be close to their non-sport counterparts. For example, the production of sport-shoes is similar to the production of non-sport shoes, as opposed to the production of cars, electricity or financial services.

Table 9.1 below outlines the gross value added (GVA) generated by Gaelic Games in Ireland in 2022. As shown in previous chapters, Gaelic Games contributed a direct impact of €710 million, accounting for 0.13% of Ireland's total GVA. For the first time, both the indirect impact and associated multipliers were estimated, with the indirect impact amounting to €293 million, representing 0.05% of the Irish economy. The combined impact, totalling €1,003 million, reflects both the direct and supply chain effects and is equivalent to 0.19% of the Irish GVA. Table 9.1 shows that the direct impact is 71% of the total effect, whilst the indirect impact counts for the remaining 29%. The last line of the table shows the GVA multipliers.

**Table 9.1: Gaelic Games, Indirect impact on GVA**

	Republic of Ireland		Northern Ireland		Total		%
	€m	share	€m	share	€m	share	
Direct impact	660	0.14%	42.9	0.08%	710	0.13%	71%
Indirect impact	266	0.06%	22.3	0.04%	293	0.05%	29%
Total impact	926	0.19%	65.2	0.12%	1,003	0.19%	100%
Multipliers	1.40		1.52		1.41		

The overall GVA multiplier in Ireland is 1.41, showing that when we invest €1m Gaelic Games, then €1.41m GVA is generated throughout the economy. The GVA multiplier values in the Republic of Ireland and in Northern Ireland are 1.40 and 1.52 respectively. These values are reasonable and expected as the previous analysis has shown that the characteristic goods 'weight' more in the Republic of Ireland than in Northern Ireland. Characteristic goods (sport services and education) rely, by their nature, heavily on labour, hence they are associated with smaller multipliers.

Table 9.2 below outlines the employment generated by Gaelic Games in Ireland in 2022. As shown in previous chapters, Gaelic Games contributed a direct impact of 10,600 jobs, accounting for 0.31% of Ireland's total employment. Both the indirect impact and associated multipliers were estimated especially for employment, with the indirect impact amounting to 3,400 jobs, representing 0.1% of the Irish economy. The combined impact, totalling 14,000 jobs, reflects both the direct and supply chain effects and is equivalent to 0.41% of Irish employment. Table 9.2 shows that the direct impact is 76% of the total effect, whilst the indirect impact counts for the remaining 24%. The last line of the table shows the employment multipliers.

**Table 9.2: Gaelic Games, Indirect impact on Employment**

	Republic of Ireland		Northern Ireland		Total		%
	thousands	share	thousands	share	thousands	share	
Direct impact	9.5	0.36%	1.1	0.14%	10.6	0.31%	76%
Indirect impact	3.1	0.12%	0.4	0.05%	3.4	0.10%	24%
Total impact	12.6	0.48%	1.5	0.19%	14.0	0.41%	100%
Multipliers	1.32		1.35		1.32		

The overall employment multiplier in Ireland is 1.32, showing that when we generate 1,000 jobs directly through Gaelic Games, then 1,320 jobs are generated throughout the economy. The GVA multiplier values in the Republic of Ireland and in Northern Ireland are 1.32 and 1.35 respectively, reflecting the greater weight of characteristic goods in the Republic of Ireland.

The final Table 9.3 below outlines the output generated by Gaelic Games in Ireland in 2022. As shown in previous chapters, Gaelic Games contributed a direct impact of €1,619 million in turnover, accounting for 0.15% of Ireland's total output. Both the indirect impact and associated multipliers were estimated specifically for turnover, with the indirect impact amounting to €774 million, representing 0.23% of the Irish economy. The combined impact, totalling €2,393 million, reflects both the direct and supply chain effects and is equivalent to 0.23% of Irish output. Table 9.2 shows that the direct impact is 68% of the total effect, whilst the indirect impact counts for the remaining 32%. The last line of the table shows the output multipliers.

**Table 9.3: Gaelic Games, Indirect impact on Turnover**

	Republic of Ireland		Northern Ireland		Total		%
	€m	share	£m	share	€m	share	
Direct impact	1,523	0.16%	96	0.10%	1,619	0.15%	68%
Indirect impact	709	0.08%	41	0.04%	774	0.07%	32%
Total impact	2,232	0.24%	137	0.14%	2,393	0.23%	100%
Multipliers	1.47		1.67		1.48		

The overall output multiplier in Ireland is 1.48, showing that when we generate €1 million of turnover directly through Gaelic Games, then €1.48 million is generated throughout the economy. The output multiplier values in the Republic of Ireland and in Northern Ireland are 1.47 and 1.67, reflecting the greater weight of characteristic goods in the Republic of Ireland.

## 10. SPORTING CONTEXT

Utilising previous estimations of the sport economy in Ireland allows us to derive an unofficial estimate for the sports economy in 2022. For instance, it was found that in 2018, the Gross Value Added (GVA) from the sports sector accounted for 1.4% of the total GVA of the entire economy in the Republic of Ireland. Similarly, a recent DCMS report on the UK SSA found that sport is 2.3% of the GVA generated in Northern Ireland. Based on these associations and recent statistics, we can estimate the value of the sports economy for 2022. However, it is important to note that this estimation assumes that the structure of the sports economy relative to the rest of the economy remains unchanged.

Table 10.1 presents key statistics that illustrate the relationship between the Gaelic Games industry and both the Irish sport economy and the broader economy. These statistics are essential for understanding the economic impact and significance of Gaelic Games within the overall landscape of sport in Ireland.

**Table 10.1: The Gaelic Games Economy in Context**

Measure	Gaelic Games (2022)		Sport (2022)		Gaelic Games as % of the sport economy		Gaelic Games as % of the Irish sport economy	Gaelic Games as % of the Irish economy
	Rol	NI	Rol	NI	Rol	NI		
Consumer spending	€345 m	£28m	€3,869 m	£813 m	8.9%	3.4%	7.8%	0.24%
GVA	€660 m	£43 m	€6,748 m	£1,216 m	9.8%	3.5%	8.7%	0.13%
Employment	9,500	1,100	82,330	26,400	11.5%	4.2%	9.8%	0.31%

The analysis in Table 10.1 indicates that Gaelic Games play a highly significant role in the sport industry, accounting for 7.8% of sport related consumer spending, 8.7% of sport related Gross Value Added (GVA), and 9.8% of sport employment. The consumer spending figure is particularly noteworthy as it highlights the connection between participation in Gaelic Games and high-value economic activities such as club membership, equipment purchases, clothing, and tourism-related activities.

Moreover, the fact that the employment percentage exceeds the GVA percentage underscores Gaelic Games' efficiency in generating jobs. This suggests that investing in and supporting Gaelic Games can serve as an effective strategy for combating unemployment and fostering economic recovery.

The structure of the relationship between Gaelic Games and the sport sector is similarly reflected in its association with the broader economy. Gaelic Games represent 0.24% of consumer spending in the Irish economy, 0.13% of Gross Value Added (GVA), and 0.31% of total employment.

The economic activity associated with Gaelic Games generates positive outcomes for government earnings in the form of tax receipts. According to the Satellite Account model, taxation from income tax, corporation tax, and Value Added Tax collectively contributes approximately €192.6 million annually to the Central Government, as shown in Table 10.2. This finding underscores the financial significance of Gaelic Games not only in promoting sport but also in supporting public finances. In comparison, the total value of grants allocated to Gaelic Games through the Sports Capital Programme was €64 million. This point indicates that the direct economic impact of Gaelic Games generates sufficient income for the Government to cover the entire capital grant by a factor of 3.



**Table 10.2: Central Government Earnings from the Gaelic Games Industry**

Source	Public Sector Income ROI (€m)	Public Sector Income NI (£m)	Public Sector Income Total (€m)
Tax on consumption (VAT)	46.7	2.3	49.4
Tax on incomes	112.8	7.1	121.1
Tax on corporation profits	20.6	1.3	22.1
<b>Total</b>	<b>180.1</b>	<b>10.7</b>	<b>192.6</b>

The tax assessment was conducted separately for each economic sector. For Northern Ireland we followed the UK policy. In the case of the Republic of Ireland the key ratios utilised in this analysis included the following:

- Average Income Tax Rate: 28%<sup>11</sup>
- Corporate Tax: 12.5%<sup>12</sup>
- Standard VAT 23%, with some categories taxed at reduced rates, or not at all<sup>13</sup>.

Finally, as it has shown in all the economic evaluations of sport in the UK and the EU, when all the parameters of sport associated revenue are considered, the public sector invariably has a budget surplus with regard to sport. This feature, together with the effectiveness of investment in Gaelic Games (in terms of GVA and employment generation throughout the economy) should reinforce the economic importance of Gaelic Games and the support of the sector in any effort to improve the economy.

Throughout Europe there are countries that achieve high economic growth associated with sport because of some critical advantages. In the case of Ireland, Gaelic Games is a strong candidate for being a source of competitive advantage. Although the clubs themselves do not have any significant employment, they act as an engine for generating employment and GVA directly and indirectly throughout the island. The impacts generated by the education services and construction are very high, showing the multidimensional character of the Gaelic Games economy itself, but also the public commitment to it.

<sup>11</sup> <https://www.oecd.org/content/dam/oecd/en/topics/policy-issues/tax-policy/taxing-wages-ireland.pdf>

<sup>12</sup> <https://www.revenue.ie/en/companies-and-charities/corporation-tax-for-companies/corporation-tax/basis-of-charge.aspx>

<sup>13</sup> <https://www.citizensinformation.ie/en/money-and-tax/tax/duties-and-vat/value-added-tax/#:~:text=23%25%20is%20the%20standard%20rate,are%20charged%20at%20this%20rate.>

## 11. CONCLUSIONS

The Gaelic Games Satellite Account illustrates various characteristics of the Gaelic Games economy that are supportive of the Government's sport objectives. For example, the Republic of Ireland's National Sports Policy for 2018-2027 outlines several key policy targets aimed at enhancing the sporting environment which can be supported by the information provided by the SSA. Some of the main objectives are outlined below.

4. **Increase Participation:** The policy aims to raise overall participation in sport from 43% to 50% of the population by 2027, which translates to an additional 260,000 people engaging in sports.
5. **Facility Development:** The policy emphasises the development of sports facilities at national, regional, and local levels to support both participation and high-performance sports.
6. **Inclusivity and Equality:** Promoting gender balance and inclusivity in sports organisations is a priority, with initiatives aimed at achieving a 40% gender balance on the boards of funded sports bodies. The integration of the administration of Gaelic Games across all Units can help in this objective.

The Gaelic Games Satellite Account can support policy formulation to achieve these objectives. Further, this report presents the findings from the application of the Satellite Account methodology to estimate the economic value of Gaelic Games in the island of Ireland for the year 2022 using three principal measures:

- Consumer spending;
- Gross Value Added (GVA), and
- Employment.

For illustrative purposes the report produces a fourth measure, turnover. The report shows that the Gaelic Games industry is associated with an extensive range of economic activity in a wide range of sectors. The key findings are listed as bullet points below.

- Gaelic Games annual participation rate is estimated to be 6.6% of the adult population, ranging from 3% in Northern Ireland to 7.0% in the Republic of Ireland.
- Consumer spending on Gaelic Games related goods and services is estimated at €377 million, equivalent to 7.8% of the sport economy and 0.24% of the Irish economy as a whole. The most significant sources of this spending are €57 million spent on live events and €52 million spent on education.
- The value of GVA was found to be €710 million, equivalent to 8.7% of the sport economy and 0.13% of the entire Irish economy.
- Employment associated with the direct demand for Gaelic Games products and services is estimated at 10,600, corresponding to 9.8% of the sport economy and of 0.31% of employment in Ireland.
- The turnover associated with the Gaelic Games industry is €1,619 million, contributing 10.2% to the sport economy and 0.15% to the economy as a whole.

- Gaelic Games generate an indirect GVA impact of €293 million, giving an overall impact of €1,003 million equivalent to 0.19% of the Irish economy. The associated multiplier was found to be 1.41.
- Gaelic Games generate an indirect employment impact of 3,400 jobs, giving an overall impact of 14,000 jobs equivalent to 0.41% of the Irish economy. The associated multiplier is 1.32.
- Gaelic Games contributes €192.6 million to the public purse via direct and indirect taxation on individuals and corporation tax.

The current Gaelic Games Satellite Account indicates that the Gaelic Games economy is an effective generator of employment, contributing significantly to both local and national economic sustainability. This characteristic positions Gaelic Games as a valuable tool for economic recovery. The variety of economic activities linked to Gaelic Games yields substantial benefits for the broader economy. The report highlights strong connections between Gaelic Games and sectors such as construction, business services, and tourism, all of which are associated with high GVA multipliers. The driving force behind the Gaelic economy is the network of clubs and sport education, supported by vibrant community engagement in sports.

Any increase in participation, particularly from new participants, is likely to impact positively on clubs and subsequently influence construction and tourism investments, thereby expanding the overall economic effects. Finally, the report demonstrates that Gaelic Games represent a secure avenue for public investment, generating approximately €192.6 million in revenue for the public purse in 2022.

Overall, the Satellite Account for Gaelic Games highlights the significant economic importance of the sport to the Irish economy. This report establishes a replicable baseline for the industry, which can be reassessed in the future and used as a benchmark for measuring the ongoing development of Gaelic Games. By providing detailed insights into employment, Gross Value Added (GVA), and contributions to public revenue, the account serves as a valuable tool for policymakers and stakeholders to gauge the economic impact of Gaelic Games over time. Such assessments can inform strategies aimed at enhancing participation and investment in the sector.

## APPENDICES

*Table A.1: Mapping of the Gaelic Games Industry through examination of the SIC 2007 codes*

<b>SIC 07 codes</b>	<b>Description</b>
<b>SECTION C:</b>	<b>MANUFACTURING</b>
1086	Manufacture of homogenised food preparations and dietetic food
1107	Manufacture of soft drinks; production of mineral waters and other bottled waters
1394	Manufacture of cordage, rope, twine and netting
1920	Production of fuel oil and gas
2652	Manufacture of watches and clocks
2920	Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers, manufacture of caravans
3230	Manufacture of sports goods
3250	Manufacture of medical and dental instruments and supplies
3299	Other manufacturing n.e.c.
<b>SECTION F:</b>	<b>CONSTRUCTION</b>
4100	Civil engineering
43	Specialised construction work
<b>SECTION G:</b>	<b>WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES &amp; MOTORCYCLES</b>
4616	Agents involved in the sale of textiles, clothing, fur, footwear and leather goods
4618	Agents specialised in the sale of other particular products
4638	Wholesale of other food, including fish, crustaceans and molluscs
4642	Wholesale of clothing and footwear
4643	Wholesale of electrical household appliances
4646	Wholesale of pharmaceutical goods
4671	Wholesale of solid, liquid and gaseous fuels and related products
4711	Retail sale in non-specialised stores with food, beverages or tobacco predominating
4725	Retail sale of beverages in specialised stores
4729	Other retail sale of food in specialised stores
4730	Retail sale of automotive fuel in specialised stores
4751	Retail sale of textiles in specialised stores
4754	Retail sale of electrical household appliances in specialised stores
4761	Retail sale of books in specialised stores
4762	Retail sale of newspapers and stationery in specialised stores
4764	Retail sale of sports goods, fishing gear, camping goods, boats and bicycles
4771	Retail sale of clothing in specialised stores
4772	Retail sale of footwear and leather goods in specialised stores
4773	Dispensing chemist in specialised stores
4774	Retail sale of medical and orthopaedic goods in specialised stores
4777	Retail sale of watches and jewellery in specialised stores
4778	Other retail sale of new goods in specialised stores
<b>SECTION H:</b>	<b>TRANSPORTATION AND STORAGE</b>
4910	Passenger rail transport, interurban
4930	Other passenger land transport
5220	Support services for transportation
<b>SECTION I:</b>	<b>ACCOMMODATION AND FOOD SERVICE ACTIVITIES</b>
5510	Hotels and similar accommodation

5520	Holiday and other short-stay accommodation
5590	Other accommodation
5610	Restaurants and mobile food service activities
5621	Event catering and other food service activities
5630	Beverage serving activities
<b>SECTION J:</b>	<b>INFORMATION AND COMMUNICATION</b>
5811	Book publishing
5813	Publishing of newspapers
5814	Publishing of journals and periodicals
5911	Motion picture, video and television programme production activities
6010	Radio broadcasting
6020	Television programming and broadcasting activities
62	Computer programming activities
63	Information services
<b>SECTION K:</b>	<b>FINANCIAL AND INSURANCE ACTIVITIES</b>
6512	Non-life insurance
<b>SECTION M:</b>	<b>PROFESSIONAL SCIENTIFIC AND TECHNICAL ACTIVITIES</b>
6910	Legal activities
7022	Business and other management consultancy activities
7110	Architectural activities
7219	Other research and experimental development on natural sciences and engineering
7420	Photographic activities
<b>SECTION N:</b>	<b>ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES</b>
7721	Renting and leasing of recreational and sports goods
8121	General cleaning services of buildings
8130	Landscape service activities
<b>SECTION O:</b>	<b>PUBLIC ADMINISTRATION AND DEFENCE SERVICES</b>
8412	Regulation of health care, education, cultural and other social services, not incl. social security
<b>SECTION P:</b>	<b>EDUCATION</b>
8510	Pre-primary education
8520	Primary education
8531	General secondary education
8532	Technical and vocational secondary education
8542	Tertiary education
8551	Sports and recreation education
8552	Cultural education
8560	Educational support services
<b>SECTION Q:</b>	<b>HUMAN HEALTH AND SOCIAL WORK ACTIVITIES</b>
8610	Hospital activities; medical nursing home activities
8621	General medical practice services
<b>SECTION R:</b>	<b>ARTS ENTERTAINMENT AND RECREATION</b>
9200	Gambling and betting activities
9311	Operation of sports facilities
9312	Activities of sport clubs
9313	Fitness facilities
9319	Other sports activities

9329	Other amusement and recreation activities n.e.c.
<b>SECTION S:</b>	<b>OTHER SERVICE ACTIVITIES</b>
9523	Repair of footwear and leather goods
9529	Repair of personal and household goods

Table A.2: Gaelic Games Sector – Consumer Spending, Ireland, 2022

SIC	EXPENDITURE TYPE	€ million
10	Manufacture of homogenised food preparations and dietetic food	14.4
11	Manufacture of soft drinks; production of mineral waters	0.5
13	Manufacture of cordage, rope, twine and netting	0.1
19	Production of fuel oil and gas	
26	Manufacture of watches and clocks	
29	Manufacture of trailers and semi-trailers, manufacture of caravans	
32	Other manufactured goods (incl. sport goods)	0.5
41	Civil engineering	
43	Specialised construction work	
46	Wholesale trade services, except of motor vehicles and motorcycles	
47	Retail trade services, except of motor vehicles and motorcycles	124.1
49	Land transport services and transport services via pipelines	4.3
52	Support services for transportation	1.9
55	Accommodation services	12.8
56	Food and beverage serving services	18.3
58	Publishing services	0.1
59	Motion picture, video and television programme production activities	0.0
60	Programming and broadcasting services	4.2
62	Computer programming activities	1.8
63	Information services	1.2
65	Non-life insurance	
69	Legal activities	
70	Business and other management consultancy activities	
71	Architectural and engineering services	
72	Other research and experimental development on natural sciences and engineering	
74	Photographic activities	
77	Renting and leasing of recreational and sports goods	0.1
81	Services to buildings and landscape	
84	Regulation of health care, education, cultural and other social services	
85	Education services	54.1
86	Human health services	7.2
92	Gambling and betting activities	10.2
93	Sporting services and amusement and recreation services	120.9
95	Repair services of computers and personal and household goods	0.1
	<b>TOTAL</b>	<b>376.8</b>

Table A.3: Gaelic Games Sector – GVA, Ireland, 2022

SIC	EXPENDITURE TYPE	€ million
10	Manufacture of homogenised food preparations and dietetic food	31.0
11	Manufacture of soft drinks; production of mineral waters	0.5
13	Manufacture of cordage, rope, twine and netting	1.2
19	Production of fuel oil and gas	2.4
26	Manufacture of watches and clocks	1.0
29	Manufacture of trailers and semi-trailers, manufacture of caravans	0.5
32	Other manufactured goods (incl. sport goods)	6.3
41	Civil engineering	33.7
43	Specialised construction work	33.8
46	Wholesale trade services, except of motor vehicles and motorcycles	15.2
47	Retail trade services, except of motor vehicles and motorcycles	61.7
49	Land transport services and transport services via pipelines	8.0
52	Support services for transportation	0.8
55	Accommodation services	11.8
56	Food and beverage serving services	14.7
58	Publishing services	3.4
59	Motion picture, video and television programme production activities	0.8
60	Programming and broadcasting services	41.9
62	Computer programming activities	44.4
63	Information services	12.9
65	Non-life insurance	2.3
69	Legal activities	2.8
70	Business and other management consultancy activities	10.7
71	Architectural and engineering services	1.7
72	Other research and experimental development on natural sciences and engineering	1.1
74	Photographic activities	0.3
77	Renting and leasing of recreational and sports goods	6.5
81	Services to buildings and landscape	1.8
84	Regulation of health care, education, cultural and other social services	27.8
85	Education services	224.8
86	Human health services	21.3
92	Gambling and betting activities	13.8
93	Sporting services and amusement and recreation services	69.1
95	Repair services of computers and personal and household goods	0.2
	<b>TOTAL</b>	<b>710.0</b>



Table A.4: Gaelic Games Sector – Employment, Ireland, 2022

SIC	EXPENDITURE TYPE	thousands
10	Manufacture of homogenised food preparations and dietetic food	0.2
11	Manufacture of soft drinks; production of mineral waters	0.0
13	Manufacture of cordage, rope, twine and netting	0.0
19	Production of fuel oil and gas	0.0
26	Manufacture of watches and clocks	0.0
29	Manufacture of trailers and semi-trailers, manufacture of caravans	0.0
32	Other manufactured goods (incl. sport goods)	0.1
41	Civil engineering	0.4
43	Specialised construction work	0.5
46	Wholesale trade services, except of motor vehicles and motorcycles	0.1
47	Retail trade services, except of motor vehicles and motorcycles	1.0
49	Land transport services and transport services via pipelines	0.2
52	Support services for transportation	0.0
55	Accommodation services	0.3
56	Food and beverage serving services	0.3
58	Publishing services	0.0
59	Motion picture, video and television programme production activities	0.0
60	Programming and broadcasting services	0.0
62	Computer programming activities	0.2
63	Information services	0.0
65	Non-life insurance	0.0
69	Legal activities	0.0
70	Business and other management consultancy activities	0.1
71	Architectural and engineering services	0.0
72	Other research and experimental development on natural sciences and engineering	0.0
74	Photographic activities	0.0
77	Renting and leasing of recreational and sports goods	0.0
81	Services to buildings and landscape	0.0
84	Regulation of health care, education, cultural and other social services	0.3
85	Education services	4.4
86	Human health services	0.1
92	Gambling and betting activities	0.2
93	Sporting services and amusement and recreation services	1.9
95	Repair services of computers and personal and household goods	0.0
	<b>TOTAL</b>	<b>10.6</b>

Table A.5: Gaelic Games Sector – Turnover, Ireland, 2022

SIC	EXPENDITURE TYPE	€ million
10	Manufacture of homogenised food preparations and dietetic food	118.8
11	Manufacture of soft drinks; production of mineral waters	1.0
13	Manufacture of cordage, rope, twine and netting	0.9
19	Production of fuel oil and gas	3.8
26	Manufacture of watches and clocks	1.9
29	Manufacture of trailers and semi-trailers, manufacture of caravans	0.8
32	Other manufactured goods (incl. sport goods)	13.9
41	Civil engineering	139.4
43	Specialised construction work	133.2
46	Wholesale trade services, except of motor vehicles and motorcycles	56.2
47	Retail trade services, except of motor vehicles and motorcycles	134.6
49	Land transport services and transport services via pipelines	30.3
52	Support services for transportation	2.4
55	Accommodation services	19.5
56	Food and beverage serving services	22.4
58	Publishing services	10.2
59	Motion picture, video and television programme production activities	3.2
60	Programming and broadcasting services	138.2
62	Computer programming activities	170.9
63	Information services	46.2
65	Non-life insurance	7.6
69	Legal activities	4.9
70	Business and other management consultancy activities	39.3
71	Architectural and engineering services	4.8
72	Other research and experimental development on natural sciences and engineering	10.9
74	Photographic activities	1.0
77	Renting and leasing of recreational and sports goods	35.6
81	Services to buildings and landscape	3.7
84	Regulation of health care, education, cultural and other social services	39.3
85	Education services	250.2
86	Human health services	33.8
92	Gambling and betting activities	22.6
93	Sporting services and amusement and recreation services	117.3
95	Repair services of computers and personal and household goods	0.3
	<b>TOTAL</b>	<b>1,619.2</b>