

The Giant Company Dublin Feasibility Assessment

May 2025



Summary on a page



The Giant is a mechanical statue, covered in digital panels, that stands at least 20m tall and is mounted on a stage between LED screens fit for immersive audio and light shows.

The space serves as a gathering place for residents and tourists, offering entertainment, food and beverage, and other services.

Feasibility study

Three scenarios were developed to assess the feasibility of The Giant in Dublin and capture a range of outcomes. The core differentiator between each scenario is **visitor attendance** with minor variations across other variables.

Operating breakeven ¹		Investment breakeven ¹		Optimistic	
Visitors	105k	Visitors	364k	Visitors	842k
Rank ²	46 th	Rank ²	12 th	Rank ²	5 th
Revenue	€6.1m	Revenue	€15.2m	Revenue	€31.8m
Profit	€0	Profit	€4.7m	Profit	€14.5m

Benefits for Dublin



The Giant is an iconic landmark. The Taoiseach's Taskforce for Dublin highlights the need for compelling reasons to visit the city centre. The Giant could be a focal point for residents and a beacon to drive tourism to Dublin.



The Giant is family-friendly. This offers residents and tourists an alternative to Dublin City's many alcohol-centric attractions, such as Temple Bar and various brand distilleries.



The Giant is digital. Dublin City Council's Digital Transformation Strategy aims to make Dublin a 'truly digital city' by 2030. The Giant could be Dublin's equivalent to Times Square or Piccadilly Circus.

Based on management information and independent analysis, **The Giant could be viable in Dublin.**

The operating breakeven case is based on some core assumptions:

- The Giant can be the 46th most visited fee-paying attraction in Ireland
- Visitors are willing to pay for admission, which is benchmarked against similar attractions nearby.
- A small percentage (10-25%) pay for additional services.
- Companies want to advertise their brands on The Giant.

Evaluation of potential sites

Potential location	①	②	③	④	⑤
Georges Dock	✓	✓	✓	✓	✓
Smithfield	✓	✓	✓	✓	✓
Dun Laoghaire	X	X	✓	X	X
Dublin Port	X	-	X	X	X

① = Footfall ② = Accessibility³ ③ = Services nearby⁴

④ = Attractions nearby⁵

⑤ = Overall fit

Disclaimer

This document has been prepared only for The Giant Company and solely for the purpose and on the terms agreed with The Giant Company in our agreement dated 13th December 2024. We accept no liability (including for negligence) to anyone else in connection with this document.



© 2025 PricewaterhouseCoopers. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details.

pwc

Contents

Executive Summary

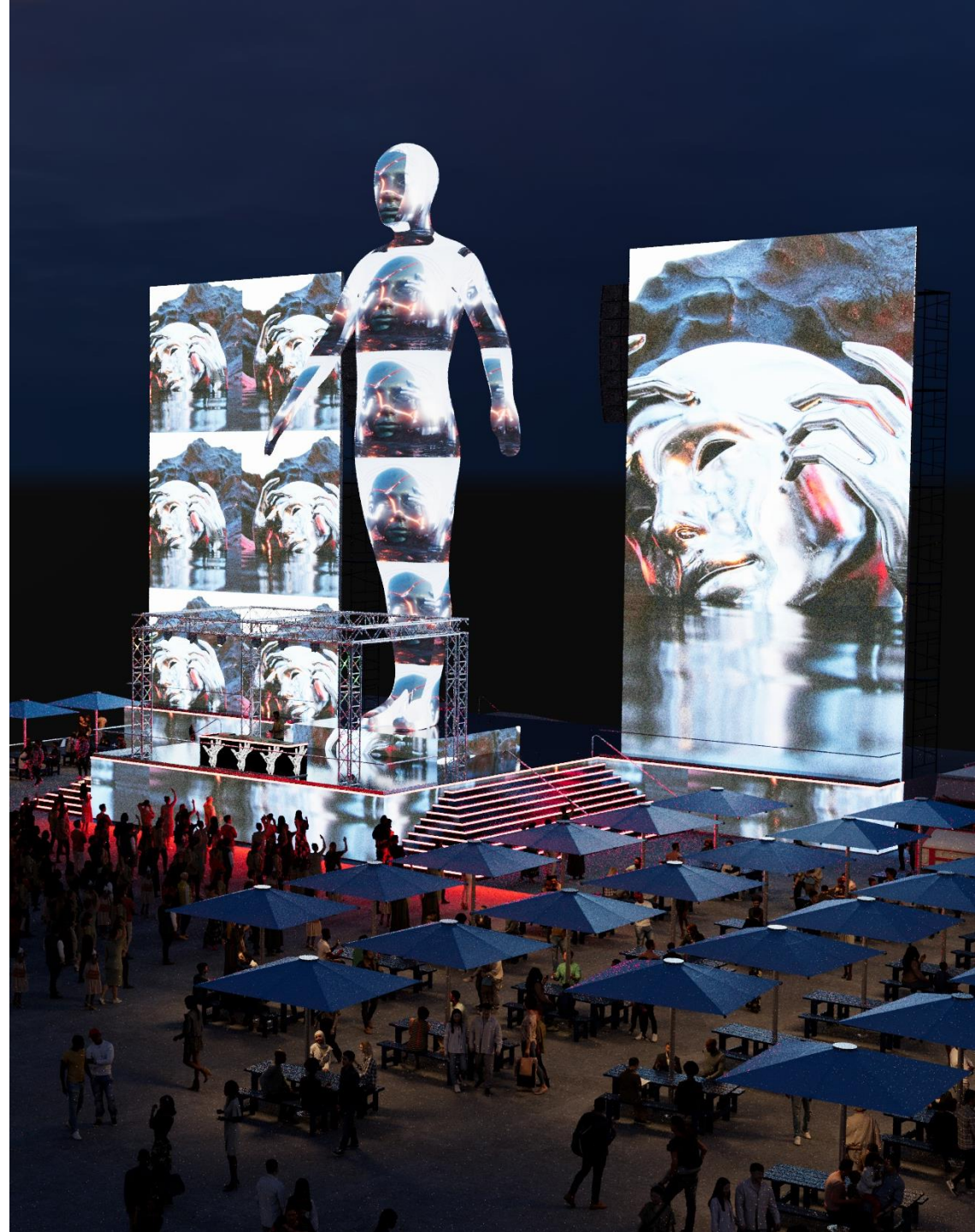
The Giant Overview

Market Analysis

Feasibility Assessment

Potential Locations and Other Considerations

Financial Appendix



The Giant is a futuristic attraction concept, offering an immersive visual and audio experience aimed at all types of visitors

The Giant overview

The Giant is a **unique attraction** featuring an up to 60 metres tall Giant statue with digital images displayed on it. Acting as an **entertaining experience** for families and children, The Giant can also transform into a country's famous heroes and **put on a display**. The Giant will become an **iconic landmark** of any city it's located in.

The Permanent Giant

- A permanent 40-60-metre-tall Giant statue.
- Visitors can walk up to the top of the viewing tower on the 'shoulders of the Giant'.



The Modular Giant

- A 20-40-metre-tall demountable statue standing on a stage between LED screens fit for immersive audio and light shows.
- The space serves as festival-type environment with stalls and activations.

Focus

The Indoor Giant


- A 15-20-metre-tall Giant statue located in large indoor public venues.
- Scanning pods and other visitor experience features are available.



The Giant can improve Dublin City's family-friendly appeal and contribute to the city's rejuvenation and digitalisation initiatives

The Giant in Dublin

Only **17%** of overseas holiday makers who visited Ireland in 2023 were part of a **family party**.



Many of Dublin's top tourist attractions and zones are **alcohol-centred**, such as the various brand distilleries and pub-heavy areas like Temple Bar.

Such attractions are **not geared towards families**.

Additionally, the Taoiseach's Taskforce for Dublin which focused on the rejuvenation of Dublin City highlighted **the need for compelling reasons to visit the city centre**.

The taskforce identifies 3-4 **high footfall areas** to create "visitor corridors". The Giant can be a catalyst for this goal, offering a **new type of attraction** suitable for **families with children**.

With features such as....



Immersive shows and displays



Unique Giant selfie experience



Augmented reality video game

....The Giant's presence in Dublin City can:

1

Improve Dublin's family-friendly image

2

Bring a different and unique type of attraction to Dublin City

Dublin needs to become 'smarter' through digitalisation to improve the **liveability and attractiveness** of the city.

Smart Dublin is working towards '**future-proofing**' the Dublin region, while Dublin City Council has set out a Digital Transformation Strategy, aiming to make Dublin City a '**truly digital city**' by 2030.

Digital attractions such as **New York's Times Square** or **London's Piccadilly Circus** welcome hundreds of thousands of visitors daily.

The Giant network will connect Dublin's Giant with other Giants around the world and be **Dublin's landmark digital attraction**, significantly enhancing the city's appeal, and positively contributing to its digitalisation initiatives by:



Boosting economy and tourism



Enhancing city identity



Entertaining citizens



Smart City integration



Connecting Dublin with cities around the world

Landmark digital attractions



Times Square, New York



Piccadilly Circus, London

Revenue for The Giant will be raised from a variety of sources which will be primarily driven by admissions numbers

Revenue drivers

	Assumptions	Risk level	Rationale
Dublin feasibility assessment - revenue drivers	Visitor numbers	Range between 105k-842k depending on scenario, placing The Giant between the 5 th and 46 th most popular paid attraction in Ireland	<i>Med</i> Volumes assumed are 1) operating breakeven; 2) total investment breakeven; 3) approaching Book of Kells volume levels.
	Admission price	Single adult price of €25, with average admission price €20 when taking into account reductions for family, student and OAP admissions.	<i>Low</i> Other Dublin City Centre attractions price single adult tickets in the range of €23-€28 and have discounts for family, student and OAP admissions.
	Selfies	Visitors can pay €30 to have their image displayed onto 2 LED screens and The Giant. Penetration decreases as attendance increases	<i>Low</i> Selfe displays are one of the most unique offerings of The Giant and is likely to have a reasonable uptake among visitors.
	Gaming	Management envisions a virtual reality gaming experience, with up to 10 games on offer with each costing €5 to play. Assumption of 10% of visitors paying for an average of 1 games each.	<i>Med</i> The Giant Company has developed an augmented reality gaming experience using smartphones.
	Retail and F&B	10% of visitors will pay an average of €25 for branded merchandise. 25% of visitors will pay an average of €12 for Food and Beverages.	<i>Low</i> Spend and penetration numbers assumed have been kept conservative, taking into consideration the number of other retail and F&B options in town.
	Advertisements revenue	The Giant can earn advertising revenue from €5k-9k per day.	<i>Med</i> Benchmarking indicates this as a fair range for expected revenue. Med. risk due to the bespoke ad design needed and HFSS and alcoholic ad considerations ¹

Costs have been segmented into COGS which are variable and overheads which are fixed, additional contingency costs of 10% have been included

Cost drivers

	<i>Assumptions</i>	<i>Risk level</i>	<i>Rationale</i>
Dublin feasibility assessment - cost drivers	COGS COGS have been assumed to grow with revenue, with assumptions made for each COGS line item on the extent to which they grow with revenue	<i>Med</i>	Management input and desktop analysis have been incorporated in our estimates of these costs and where available, average industry margins have been taken for COGS. Some line items may
	Overheads Fixed costs for The Giant comprise of computer and web design, financial and legal admin, and utilities. It is assumed in this report The Giant will be fixed in location and therefore no assembly and disassembly costs are included.	<i>Low</i>	Fixed costs have largely been advised by management based on their cost estimates to date and are unlikely to vary substantially from estimates.
	Contingencies Contingency costs included as 10% of total costs	<i>N/A</i>	As The Giant is a bespoke concept which has not been implemented yet to date, we have included contingency costs to account for risks in understating any above costs or realising other unexpected costs.

We considered three scenarios for The Giant; 1) OpEx breakeven, 2) investment breakeven, 3) an additional upside scenario returning profit

Scenarios

Operating breakeven

1

Attendance and revenue figures required to cover all operating expenses on a yearly basis

Investment breakeven

2

Attendance and revenue figures required to cover all operating expenses and capital expenses over a 7 year investment period, in line with the assumed life span of The Giant

Optimistic

3

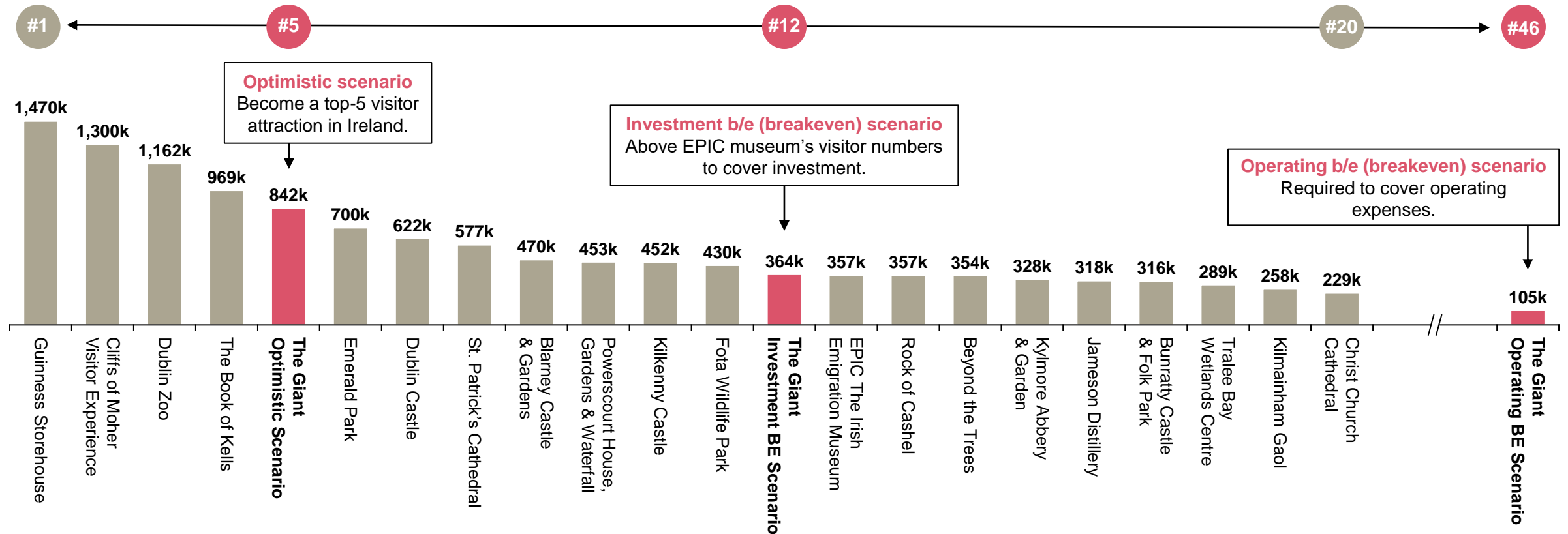
Attendance and revenue figures in excess of investment breakeven, which return a healthy profit over the life cycle of The Giant

Attendance numbers are the largest driver of revenue; we have taken 3 scenarios placing The Giant between the 5th to 46th most popular fee-paying attraction

Benchmarking visitor attendance

Top fee-paying attractions in Ireland

By number of visitors, 2023



Operating breakeven assumes that operating expenses alone are covered, while Investment breakeven also covers the CapEx, and Optimistic yields higher profits

Scenarios summary P&Ls

Annual P&L	Scenario		
	Operating breakeven	Investment breakeven	Optimistic
Visitor numbers	104,650	364,000	841,750
Gross Revenue	€6,052,610	€15,201,850	€27,606,000
COGS	€3,431,336	€6,594,929	€10,598,180
Gross Profit	€3,545,864	€8,606,921	€17,007,820
Overheads	€2,883,513	€2,951,448	€2,951,448
Contingencies	€564,481	€982,582	€1,614,237
EBITDA	€0	€4,672,892	€14,501,671
EBITDA (%)	0.0%	30.7%	45.6%

Four potential site locations have been identified in Dublin and evaluated against criteria such as location, footfall, accessibility and services or attractions nearby

Summary of potential site locations



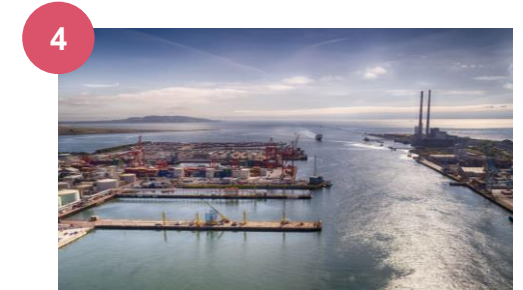
George's Dock



Smithfield Square



Dun Laoghaire



Dublin Port

Location	North Wall, Dublin 1	Smithfield, Dublin 7	South County Dublin	Dublin Port, Dublin 1
Est. capacity	c. 5,000 square metres	c. 7,000 square metres	<i>Dependent on exact site location</i>	<i>Dependent on exact site location, space unlikely to be an issue</i>
Organic footfall	Site located in target area 1 based on high pedestrian footfall ¹	Site located in target area 2 based on high pedestrian footfall	Site located outside of high pedestrian footfall areas	Site located outside of high pedestrian footfall areas
Accessibility ²	High	High	Low	Medium
Services ³ nearby	✓	✓	✓	✗
Attractions ⁴ (<1km)	✓	✓	✗	✗

Contents

Executive Summary

The Giant Overview

Market Analysis

Feasibility Assessment

Potential Locations and Other Considerations

Financial Appendix





The Giant is an immersive attraction built around the motto "Awaken the Giant in You!" — a celebration of human potential and achievement.

At its core, it features a dynamic, moving monument that utilizes full-body scanning technology to transform visitors into Giants, placing them alongside figures from legend and mythology, history's pioneers, and today's most influential game-changers in science, technology, the arts, sports, business, media, etc.

The Giant brings these stories to life, reinforcing the idea that anyone can become a Giant.

As a family-oriented attraction, it is designed to inspire and empower young visitors, encouraging them to recognize their potential and strive for greatness in their own lives.



The Giant is a futuristic attraction concept with three distinct iterations, this study focuses on The Modular Giant, offering an immersive visual and audio experience

The Giant overview

The Giant is a **unique attraction** featuring an up to 60 metres tall Giant statue with digital images displayed on it. Acting as an **entertaining experience** for families and children, The Giant can also transform into a country's famous heroes and **put on a display**. The Giant will become an **iconic landmark** of any city it's located in.

The Permanent Giant

- A permanent 40-60-metre-tall Giant statue.
- Visitors can walk up to the top of the viewing tower on the 'shoulders of the Giant'.



The Modular Giant

- A 20-40-metre-tall demountable statue standing on a stage between LED screens fit for immersive audio and light shows.
- The space serves as festival-type environment with stalls and activations.

Focus

The Indoor Giant

- A 15-20-metre-tall Giant statue located in large indoor public venues.
- Scanning pods and other visitor experience features are available.



The Giant will present distinctive shows and unique thematic events and can act as a focal point for celebrating Irish and International heroes and achievements

The Giant events



Seasonal and cultural festivals

Celebration of Irish cultural festivals throughout the year such as St. Patrick's Day, Halloween, Bealtaine, Lúnasa, Bloomsday celebrations etc.



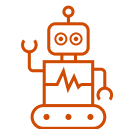
Unique thematic events for anniversary and birthday celebrations

Art installations and performances celebrating historical events, such as Ireland's literary past, and birthday's such as Yeats, Joyce, Wilde, Sinéad O'Connor, Saoirse Ronan etc.



Family events

Specific days and nights aimed at families with curated festivals and events including shows, educational and entertaining activities, street performers and fun food options.



Corporate and experiential events

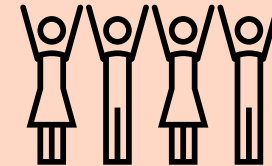
Partnerships with tech giants with Dublin hubs to host cutting edge technology launches along with being a corporate gathering space with interactive shows for businesses.



Art and culture

Provides a platform for local artists, comedians and entertainers to perform in front of large crowds including an ideal showcase for digital art or NFTs to be demonstrated on The Giant.

The Giant will celebrate Giants of sport, music, art, science and innovation.



The Giant can also be a gathering point for city events such as welcoming back Irish athletes from events like the Olympics or celebrations such as New Year's Eve with concert performances.

With many of Dublin's famous attractions being geared towards an older cohort, The Giant offers a family-friendly experience, encouraging people into the city

The Giant – a family friendly attraction

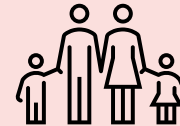
Many of Dublin City's top visited attractions are **alcohol centred**, such as the **various brand distilleries**, as well as famous areas in the city such as **Temple Bar**.

Such attractions are **not geared towards** families with **young children**.

Additionally, the Taoiseach's Taskforce for Dublin is calling out for better attractions in Dublin, highlighting **the need for compelling reasons to visit the city centre**.

The taskforce identifies 3-4 **high footfall areas** to create "visitor corridors".

Only **17%** of overseas holiday makers who visited Ireland in 2023 were part of a **family party**.



While family friendly attractions in Dublin City include Dublin Zoo, and interactive museums such as the National Wax Museum Plus, EPIC Museum and Dublinia, there must be more pulling families to Dublin City.

With **historic sites, galleries and museums** making up **70% of attractions in Dublin**, there is **not enough** on offer for families with children.

The Giant can be a catalyst for the Taskforce's goals, offering a **new type of attraction** suitable for **families with children**, with features such as:



Immersive shows and displays

With two LED screens and audio supporting the Giant, shows on Irish culture and history can be displayed.



Unique Giant selfie experience

A 3D scanning machine will allow visitors to have a full body scan of themselves displayed on the Giant.



Augmented reality video game

Visitors will be able to download a play an augmented reality game on The Giant site, on their own devices.

The Giant's presence in Dublin City can help to:

1

Improve Dublin City's family friendly image

- The Giant will increase Dublin's limited number of family friendly attractions.
- This will help move Dublin's image away from being a city with alcohol-centred activities and attract more families to visit the city.

2

Bring a different and unique type of attraction to Dublin City

- A trend has recently emerged in Dublin with young people finding things that are not centred around alcohol to do.
- The Giant will act as a new, different type of attraction for Dublin residents and tourists to enjoy.

The installation of an iconic digital attraction will support the digitalisation of Dublin City, which is a goal for Dublin City Council and Smart Dublin

Digitalisation of Dublin City

Globally, governments are digitalising their cities, known as developing a 'smart city'.

Digital attractions can significantly enhance a city's appeal, positively contributing to its digitalisation initiatives. The Giant can be Dublin's landmark digital attraction.

Dublin needs to become a smarter city to improve the **liveability and attractiveness** of the city for both citizens and visitors.

Smart Dublin is working towards '**future-proofing**' the Dublin region, while Dublin City Council has set out a Digital Transformation Strategy, aiming to make Dublin city a '**truly digital city**' by 2030.

Some goals of the strategy are to achieve:

- A positive impact on the City's **environment, economy and mobility** through the adoption of **technology initiatives**.
- Positive **citizen engagement** in the digital transformation of the city across communities.

Benefits of digital attractions



Boosts economy and tourism

Iconic digital attractions achieve landmark status, becoming 'must-see' sites for tourists. This creates jobs and business opportunities.



Enhances city identity

Landmark status attractions receive global recognition and act as a cultural showcase of the city's history, promoting the city's identity.



Entertainment of citizens

A digital attraction can offer interactive experiences and live events for local residents, making public spaces more engaging.



Smart City integration

Digital screens can be used to provide real time information to citizens, e.g. weather and air quality etc.

Examples of landmark digital attractions



Times Square

New York
300,000 daily visitors



Piccadilly Circus

London
277,000 daily visitors



Shibuya Crossing

Tokyo
2.4 million daily visitors

Contents

Executive Summary

The Giant Overview

Market Analysis

Available Markets

Competitive landscape

Market Risks

Feasibility Assessment

Potential Locations and Other Considerations

Financial Appendix



The Giant can expect to draw visitation from residents living locally, domestic tourists and the significant numbers of overseas tourists who visit Dublin each year

Market segmentation

Local resident market



The primary catchment area for an attraction in Dublin City Centre is the Greater Dublin Area (GDA), which encompasses Dublin and surrounding counties Meath, Kildare and Wicklow.

People living in the GDA would visit the attraction as part of a day trip to Dublin city. The GDA can then be subdivided into populations based on proximity to Dublin City Centre.

The local resident market can be captured as:

- Those **living within 60 minutes** of the proposed site.
- Those **living within 60-120 minutes** of the proposed site.

Domestic tourist market



Dublin is the largest city in Ireland and attracts visitors from outside the 120-minute travel time, who are living in other counties across Ireland, **including Northern Ireland.**

These visitors are more likely to stay overnight in the city rather than travel to and from Dublin in the one day.

The domestic tourism market can be captured as:

- **Domestic tourists** staying **within 60 minutes** of the proposed site.

Overseas tourist market



The aim of The Giant is to be a focal point for tourists who come to visit Dublin from overseas (not including Northern Ireland), and to eventually be viewed as a 'must see' attraction in the city.

As Dublin receives a huge number of overseas tourists during the year, capturing this market is integral to any potential success of The Giant.

The overseas tourism market can be captured as:

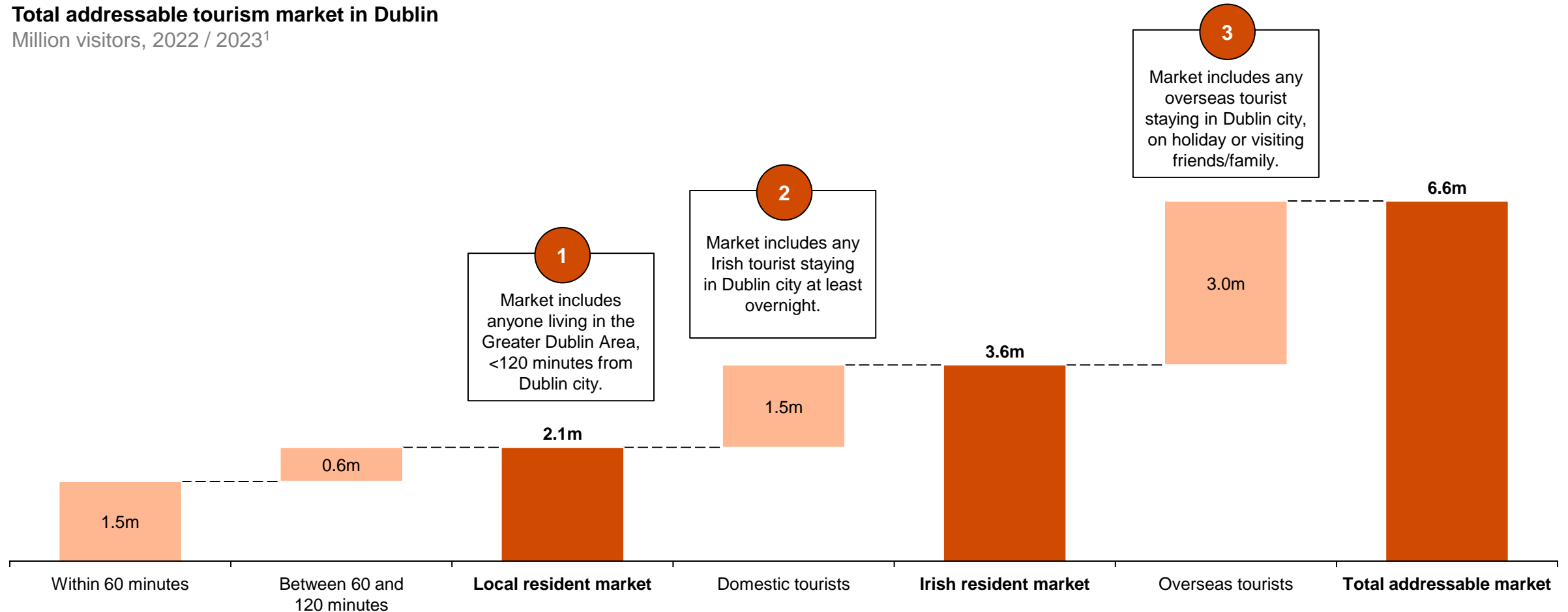
- **International tourists** staying **within 60 minutes** of the proposed site.

Combining the local residential market, the domestic tourism market and the overseas tourism market, there are 6.6 million addressable yearly visitors to Dublin

Total addressable market for tourism in Dublin

Total addressable tourism market in Dublin

Million visitors, 2022 / 2023¹

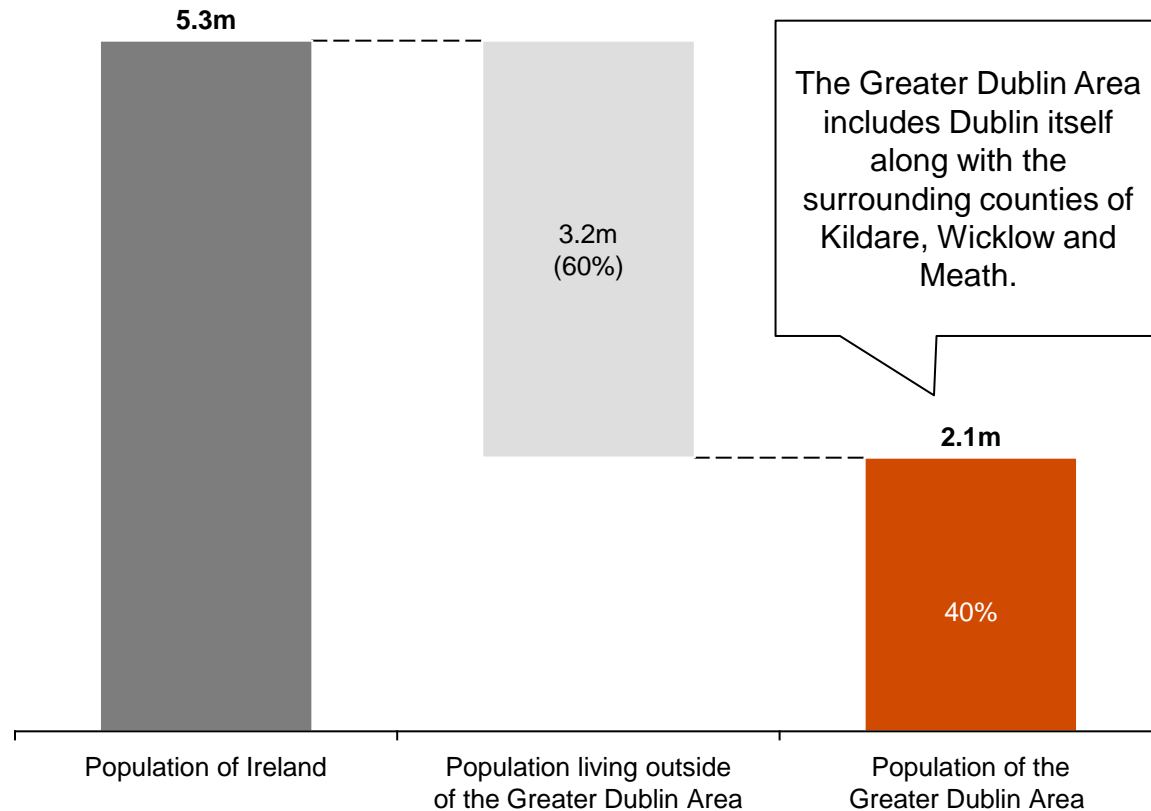


40% of Ireland's 5.3 million person population live in the GDA which is made up of counties Dublin, Kildare, Meath and Wicklow, all within 120 minutes of Dublin City

Addressable local resident market

Greater Dublin Area population

Million residents, 2022



Of the addressable resident population, 70% live in Dublin within 60 minutes of the city centre, while the remainder live 60-120 minutes away from Dublin City

Local resident market segmentation

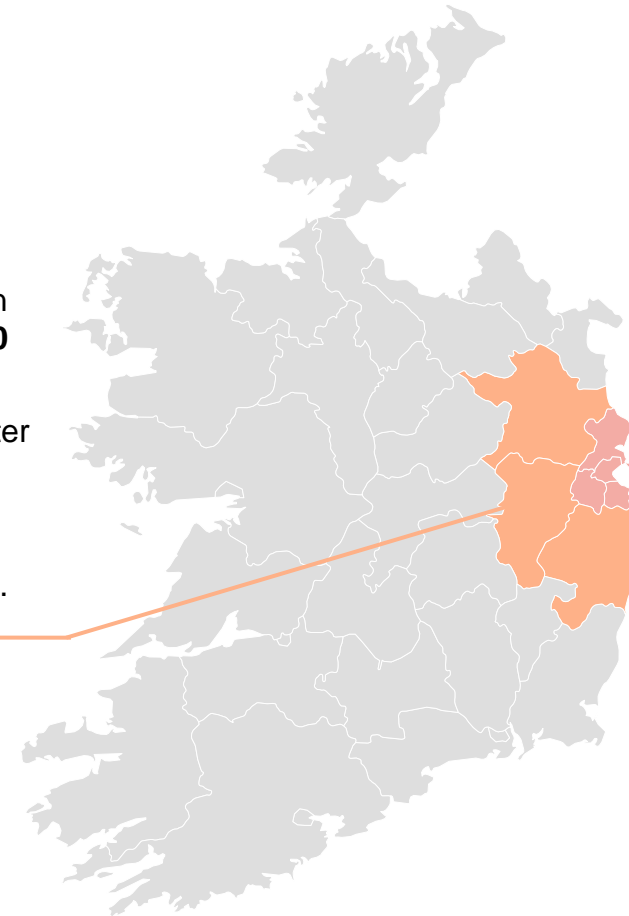
Greater Dublin Area population breakdown

Million residents, 2022

Area	Population
Dublin City	590,000
Dun-Laoghaire-Rathdown	230,000
Fingal	330,000
South Dublin	300,000
County Dublin (within 60 minutes)	1,460,000
County Meath	220,000
County Kildare	250,000
County Wicklow	160,000
Meath, Kildare, Wicklow (60-120 minutes)	620,000
Greater Dublin Area (within 120 minutes)	2,080,000

Residents living in Meath, Kildare and Wicklow are on average, within **60 and 120 minutes** of Dublin city.

Dublin Bus serves commuter towns on the border of Dublin, while Bus Éireann and Iarnród Éireann serve large towns in the counties.



Residents living in County Dublin are within **60 minutes** of Dublin city.

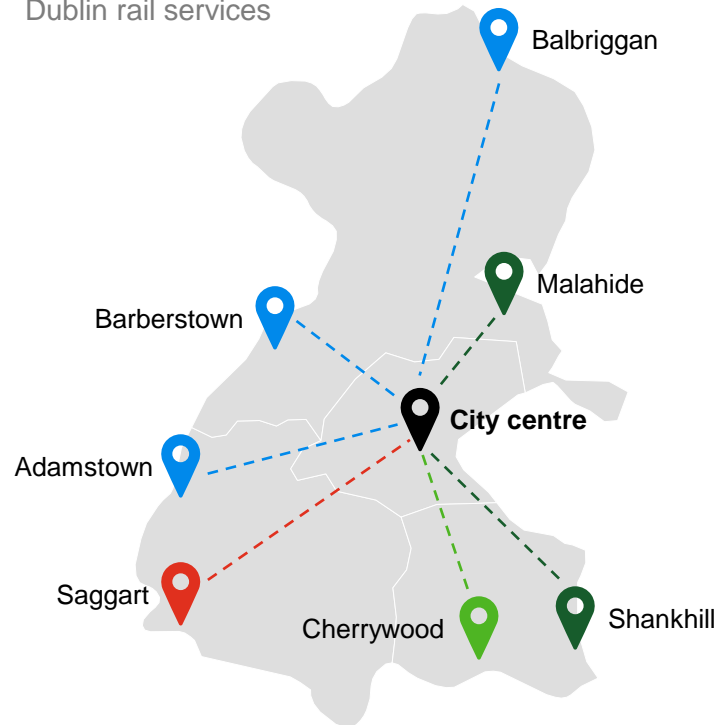
Dublin Bus serves the entire county, while the Luas and DART services also bring people into the city centre.

Dublin City is accessible by various public transport links including rail and bus services from within Dublin and from the Greater Dublin Area into Dublin





Dublin City accessibility by public transport

Map of Dublin

Dublin rail services



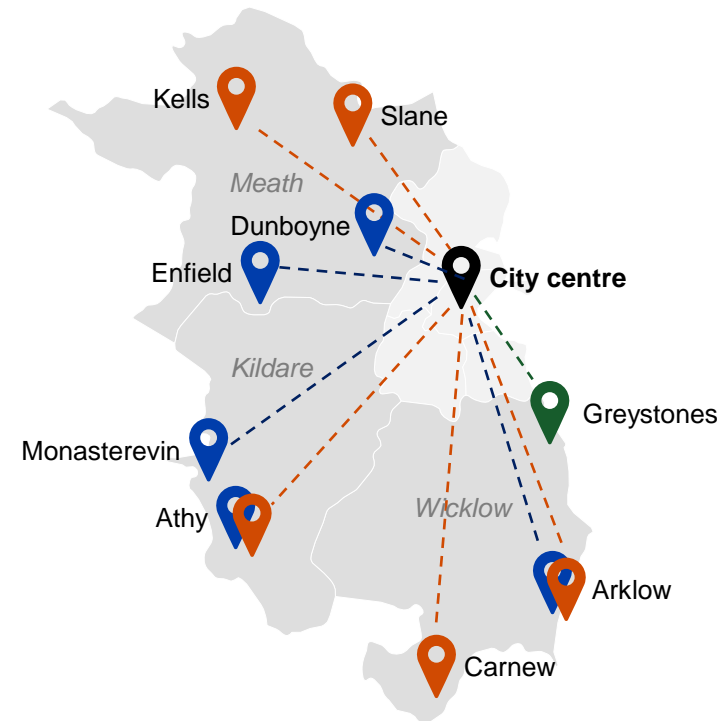
Illustrated are the furthest out points in County Dublin that are accessible to the city centre **by rail** in less than **60 minutes**.

-  Commuter service
-  DART service
-  Luas – Green line
-  Luas – Red line




Dublin Bus serves the entire county with **136 different routes** currently active. All Dublin bus routes go **towards Dublin City centre** or connect to a route that does.

Map of Greater Dublin Area

Irish rail and bus services



- 1) Illustrated are the furthest out **rail stations** in the GDA that connect to Dublin City in **60-120 minutes**.
- 2) Illustrated are the furthest out **bus stops** in the GDA that connect to Dublin City in **60-120 minutes**.

-  Iarnrod Éireann (Irish Rail) service
-  DART service
-  Bus Éireann – Local Bus Services

Dublin Bus also **serves commuter towns** on the border of Dublin such as Maynooth and Leixlip in Kildare, and Bray, Greystones, Killadreenan and Newcastle in Wicklow.

Domestic tourism to Dublin amounted to 2.4 million people in 2023, with the largest cohort coming from Northern Ireland, and families being the largest type

Addressable domestic tourism market

Review of domestic tourists to Dublin

2023



2.4 million domestic tourists visited Dublin for an average stay of **1.9 nights**.



The group spent on average **€203 per capita**, generating €490m in revenue.



The largest portion came from **Northern Ireland**, making up **c. 30%** of the group.



Over **40%** of visitors were travelling with a **family**.

Residence of domestic tourists to Dublin

2023

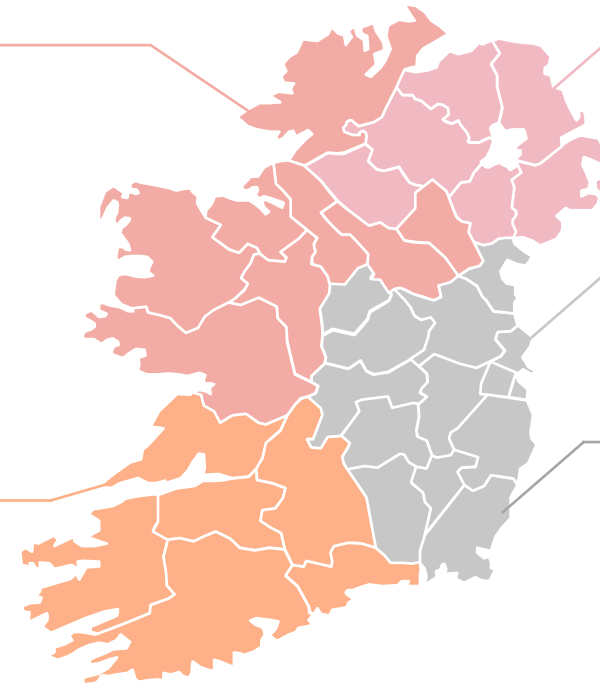
Connacht/Ulster
13%

Northern Ireland
29%

Dublin
21%

Rest of Leinster
16%

Munster
21%



The 37% of people residing in Dublin and Leinster are assumed to be out of scope to avoid double counting with the local residential market.

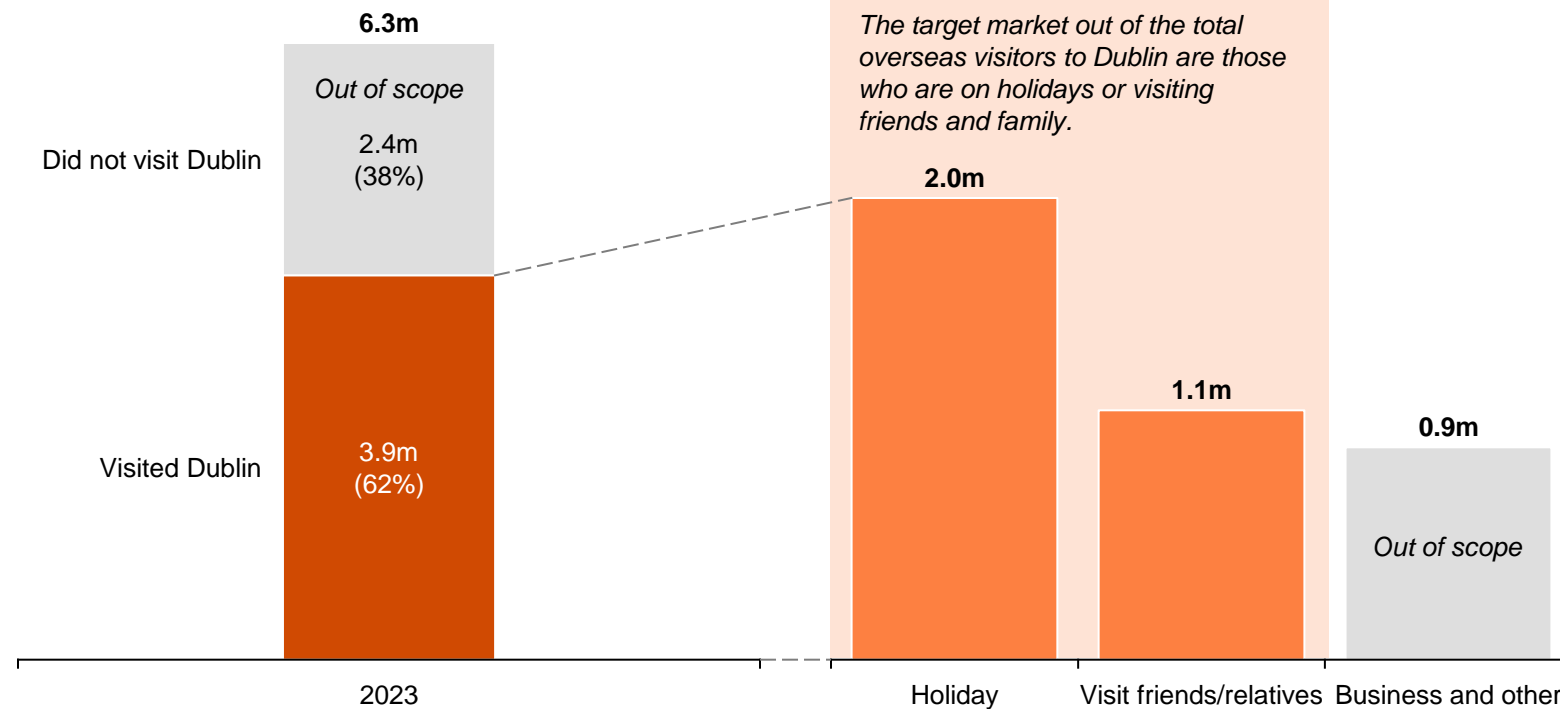
Thus, the total addressable domestic tourism market to Dublin is **1.5 million people**.

6.3 million tourists visited Ireland in 2023, with 62% of them visiting Dublin – c. 3 million of those were holiday makers or visiting friends and family

Addressable overseas tourism market

Overseas¹ tourists to Ireland and Dublin

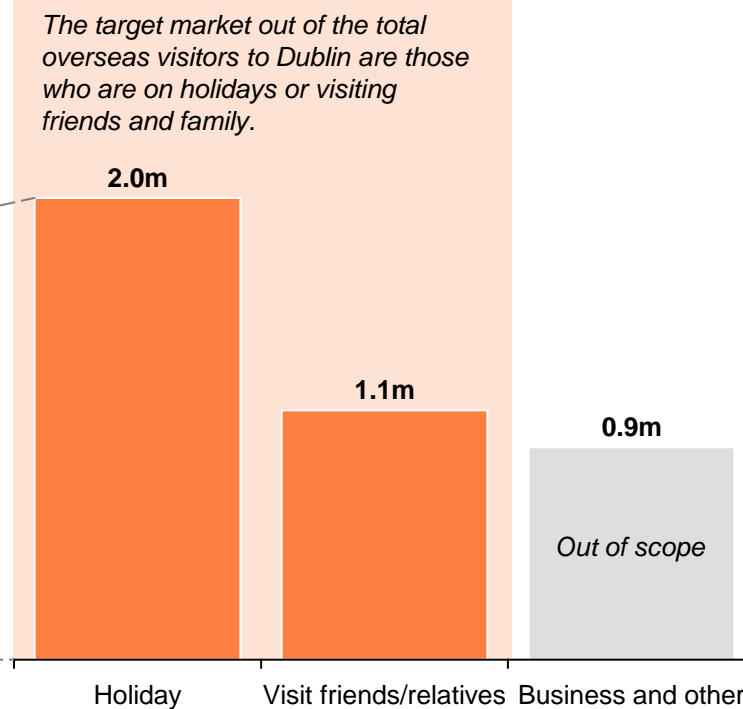
Million tourists, 2023



Taking those who did not visit Dublin or visited Dublin for business and other reasons out of scope, the total addressable overseas market for tourists to Dublin is **c. 3 million²**.

Purpose of visit for tourists who visited Dublin

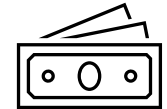
Million tourists, 2023



2 in 3 overseas holiday makers visiting Dublin were travelling to Ireland for the **first time**.



Overseas holiday markers spent on average **€154 per person per day** while in Ireland.



In 2023, Ireland **welcomed more holiday makers** from North America than from Britain.



Overseas visitors to Dublin spent **5.6 nights** in the city on average.

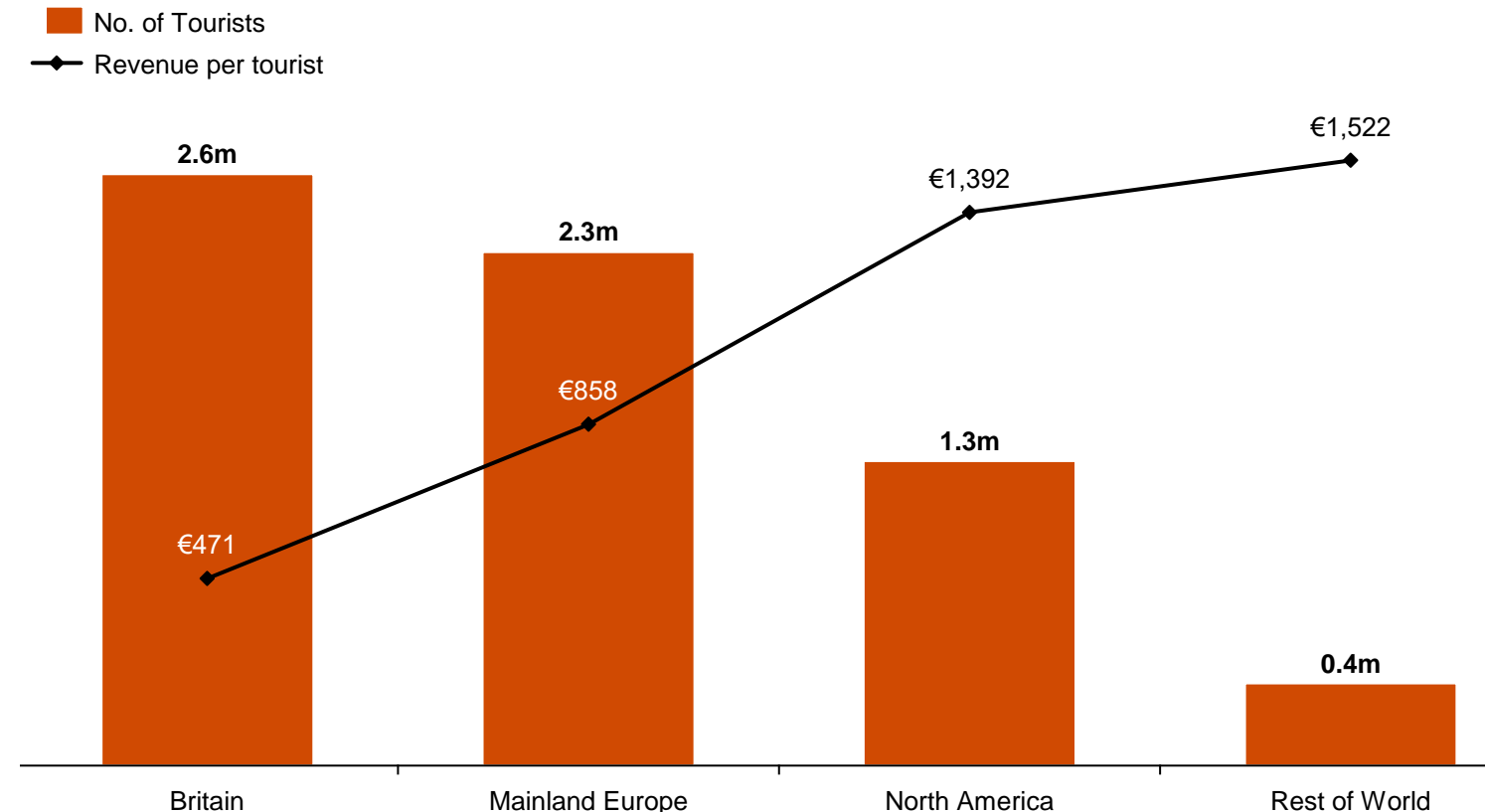


The largest cohort of tourists come from Britain, however visitors from outside the UK spend considerably more per capita when visiting Ireland

Tourist residence and spend

Tourist countries of residence and revenue generated per tourist

Million tourists and revenue generated (€), 2023



Spend habits by tourists

Revenue generated (€), 2023



Overseas tourists: €106 per day



Overseas holiday-makers: €154 per day



Largest spend category: Food and beverages (34% of overall spend)

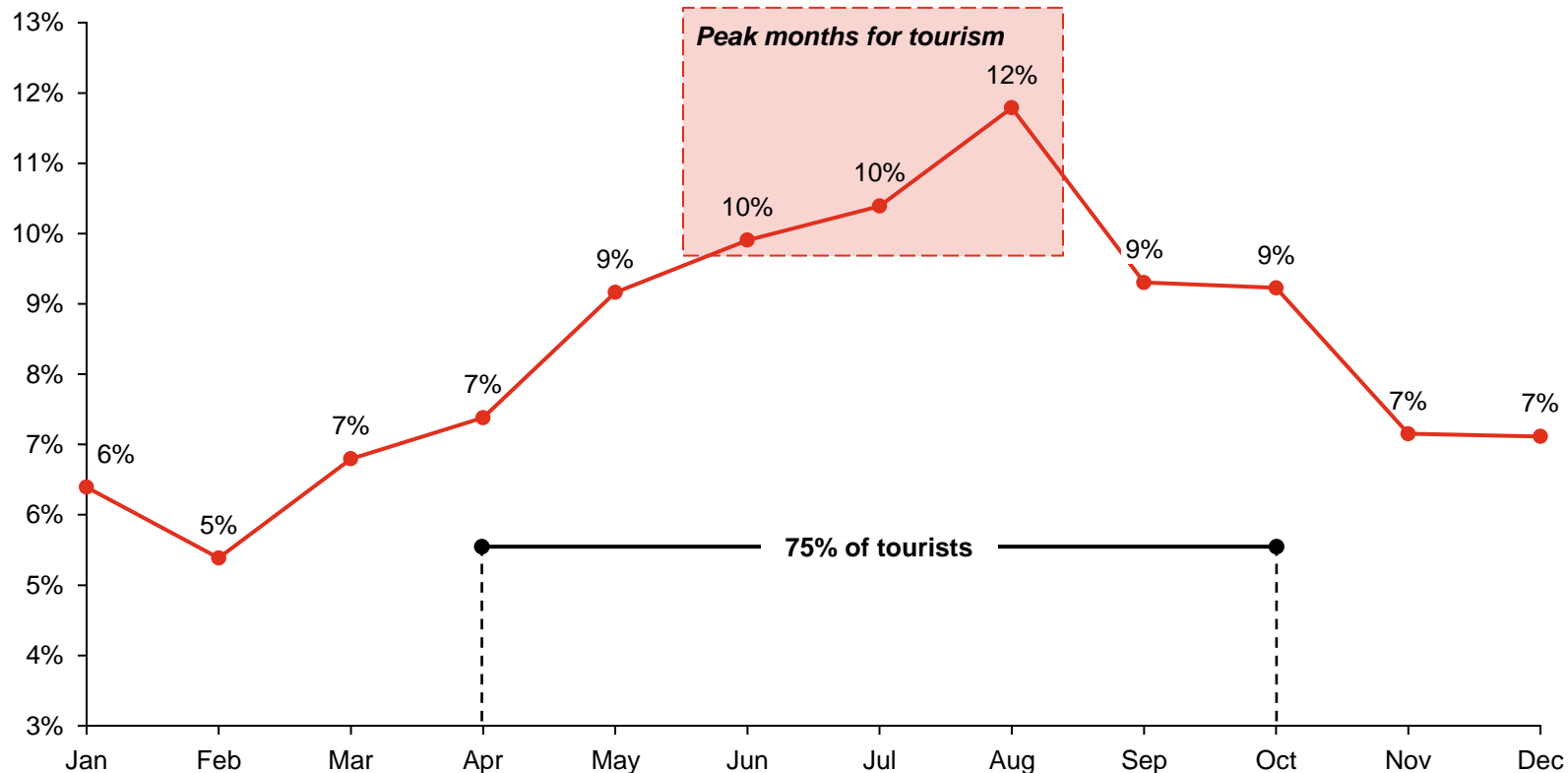
The average length of stay for overseas tourists was **8.2 nights** during 2023.

Ireland's warmer months bring 75% of total tourist visits, with top levels in June, July and August, but The Giant can be enjoyed by local visitors year-round

When tourists visit Ireland

Seasonality of visitors to Ireland

% of total visitors by month, 2023



Peak tourism months

- The Giant will be most visited by overseas tourists during Ireland's busiest tourist season in the summer.
- An outdoor attraction will gain attention from visitors on nice days, and attract people who are outside, enjoying the weather.
- However, the long hours of light will prevent The Giant from being seen in its most impressive form.

Outside of peak tourism

- The Giant may be visited more by locals and domestic tourists outside of Ireland's busiest tourist season.
- The outdoor attraction will gain attention from local visitors looking for an interesting activity during the long winter months.
- Daylight hours are shortest between November and February, so The Giant's shows will stand out for longer.

Contents

Executive Summary

The Giant Overview

Market Analysis

Available Markets

Competitive landscape

Market Risks

Feasibility Assessment

Potential Locations and Other Considerations

Financial Appendix

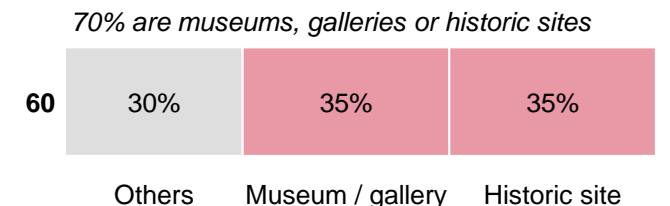
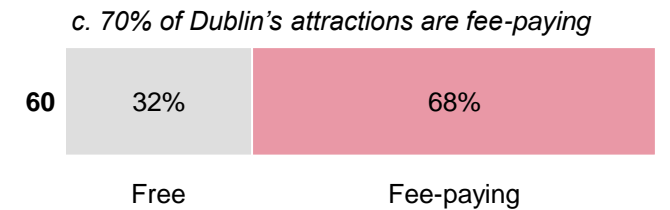
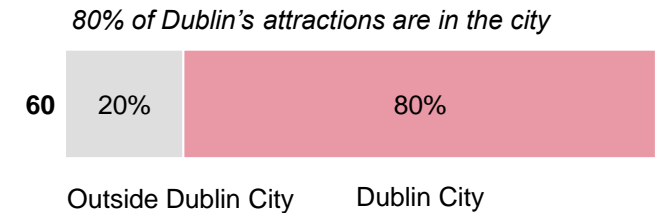
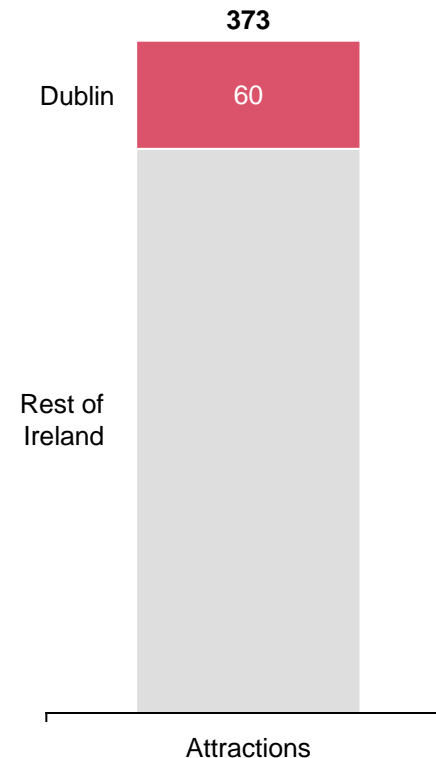
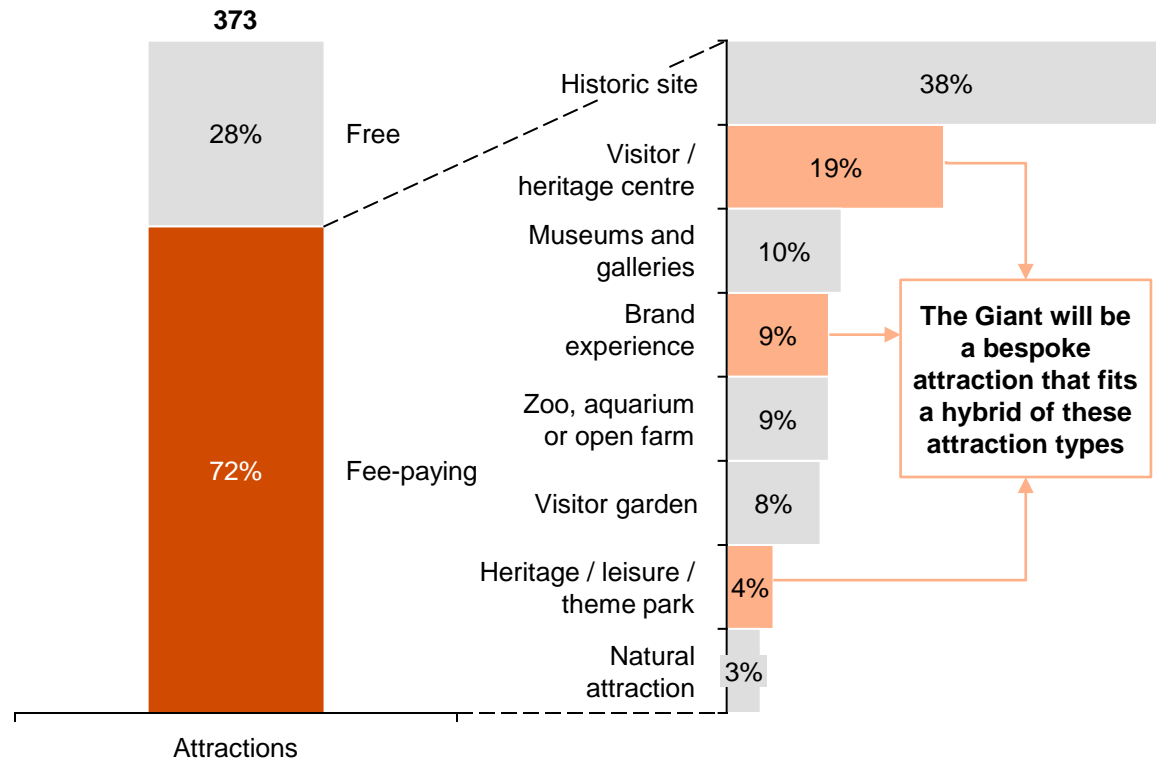


Ireland has c. 370 attractions across the country, with over 50% of them being historic or cultural experiences; Dublin is home to 60 of the attractions

Overview of Ireland's attractions

Over 70% of Ireland's attractions are fee-paying, ranging from historic sites and heritage centres, to brand experiences and theme parks.

Dublin hosts the most attractions of any county, many being among the most visited in Ireland.



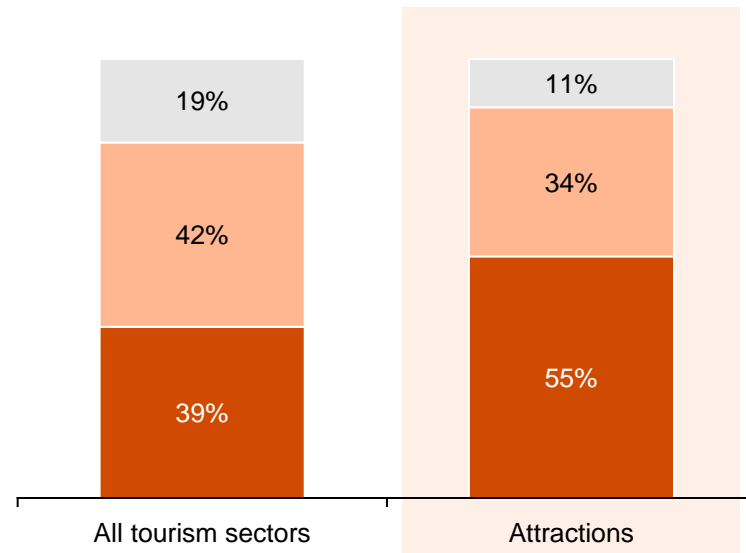
Attractions is one of the most optimistic tourism sectors, with almost 90% of the sector expecting visitor volumes to remain at or rise above 2024 levels in 2025

Market for attractions

Expectation for visitor volumes in 2025 vs 2024

% of answers for each option

■ Up on 2024 ■ Same as 2024 ■ Down on 2024



Volume expectations by tourist sector¹ were recorded by Fáilte Ireland. Attractions' volume expectations in 2025 compared to 2024 is the most positive of all other sectors.

Performance in 2024



Attractions was one of the best performing sectors in revenue change in 2024, with **61%** of attractions seeing an **increase** in their **revenue**.



Additionally, **44%** of attractions saw their **operating margin increase** in 2024, indicating the sector's stability.

Outlook for 2025



Attractions is one of the most optimistic sectors going into 2025, with **89%** **expecting their visitor volumes to stay at or rise above** 2024 levels.



The attractions sector is reliant on overseas tourism, with **60%** of attractions underpinning their revenue **increase on the overseas** market.



The sector's positive outlook is driven by **61%** of attractions citing **that positive reviews and recommendations** are their reason to be optimistic.

"We hope we continued growth despite a tricky economic and geopolitical outlook, Our projected growth is realistic and based on current data."

- Attraction, Dublin

"If overseas visitor numbers increase, we are well placed to benefit."

- Attraction, Dublin

"Looking forward to a good year ahead."

- Attraction, Monaghan

Of the fee-paying attractions in Ireland, the top 15 by visitors open daily, and charge €21 on average per adult ticket, also offering student, OAP and family prices

Fee-paying attractions in Ireland

Top 15 fee-paying attractions in Ireland

By number of visitors, 2023

 = Further explored in a case study

#	Attraction	Visitors ¹	County	Entry price ²	Frequency	Opening hours ²
1	Guinness Storehouse	1,470,000	Dublin	€28	Daily	10:00-18:00
2	Cliffs of Moher Visitor Experience	1,300,000	Clare	€15	Daily	08:00-21:00
3	Dublin Zoo	1,162,000	Dublin	€26	Daily	09:30-17:00
4	The Book of Kells	969,000	Dublin	€24	Daily	08:30-19:00
5	Emerald Park	700,000	Meath	€52	Seasonal	10:00-17:00
6	Dublin Castle	622,000	Dublin	€8	Daily	10:00-18:00
7	St. Patrick's Cathedral	577,000	Dublin	€11	Daily	09:30-17:00
8	Blarney Castle & Gardens	470,000	Cork	€23	Daily	09:00-18:00
9	Powerscourt House, Gardens & Waterfall	453,000	Wicklow	€18	Daily	09:30-17:00
10	Kilkenny Castle	452,000	Kilkenny	€8	Daily	09:30-17:00
11	Fota Wildlife Park	430,000	Cork	€22	Daily	09:30-17:00
12	EPIC The Irish Emigration Museum	357,000	Dublin	€23	Daily	10:00-18:45
13	Rock of Cashel	357,000	Tipperary	€8	Daily	09:00-17:00
14	Beyond the Trees	354,000	Wicklow	€29	Daily	09:00-18:00
15	Kylemore Abbey & Garden	328,000	Galway	€18	Daily	10:00-17:00

Key characteristics

c. 50% of these attractions are historic sites such as Dublin Castle, St Patrick's Cathedral and Blarney Castle & Gardens.

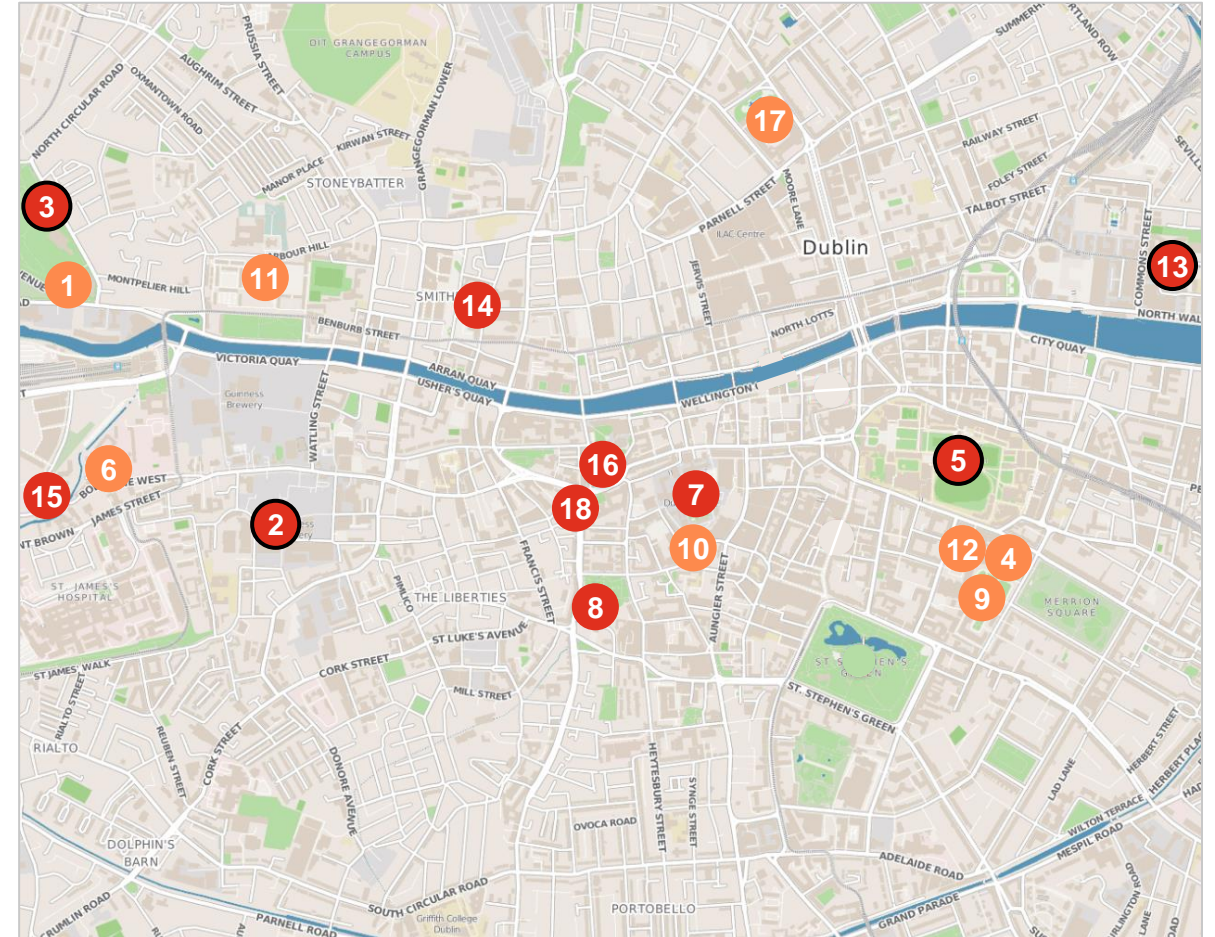
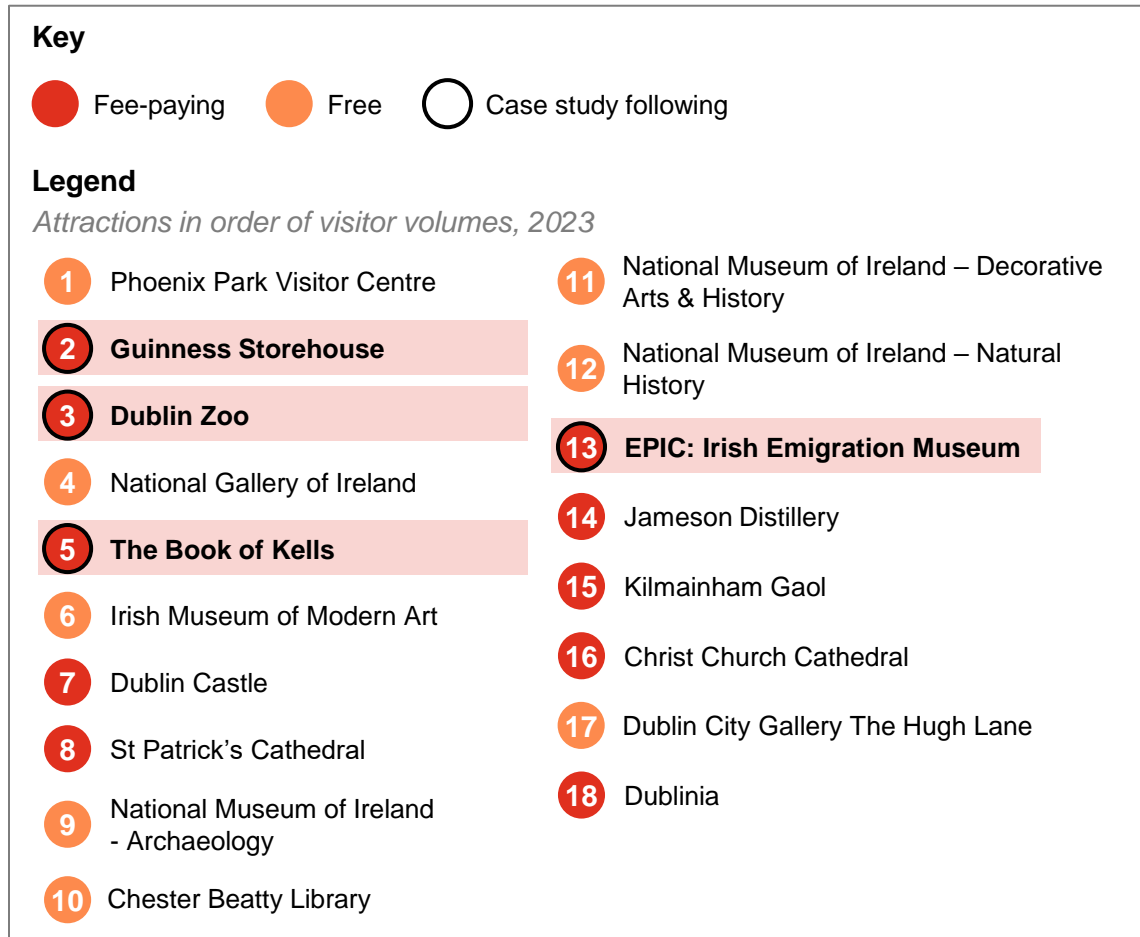
40% of these attractions are based in Dublin, with the Guinness Storehouse, Dublin Zoo and the Book of Kells bringing up to or over **one million** visitors in 2023.

The average ticket price for an adult is **€21**, with students and OAPs paying **20% less** on average, and family tickets reducing individual prices by **16%** on average.

The majority of the attractions are open from **daily** from **9am/9:30am** to between **4pm and 7pm**, many dependent on seasonal daylight.

The majority of Dublin's top visited attractions are in Dublin City, with museums, galleries, historic sites and heritage centres in close proximity of the city centre

Map of Dublin City's top attractions



The Guinness Storehouse is the top-most visited fee-paying attraction in Ireland, offering a wide range of experiences to tourists, open daily through the year

Case study 1/4 – The Guinness Storehouse

Overview



Attraction type: Brand experience

Location: St. James's Gate, Dublin 8

Opening hours: Monday-Friday: 10:00-19:00

Saturday: 09:30-20:00

Sunday: 09:30-19:00

Visitors in 2023: 1,470,000

Length of stay: 1.5 hours

Multiple restaurants and cafes, and a Guinness merchandise shop on site.

Offerings

The Guinness Storehouse is an **immersive brand experience** where visitors can take a tour through the history and making of Guinness and drink in the Gravity Bar.

The **standard experience** includes:

- Self-guided tour
- Entry to Guinness tasting rooms
- Entry to Gravity Bar and a pint of Guinness (18+)



Pricing is variable wherein the price for each experience can vary based on the time of day, and day of the week.

There are several experiences that visitors can book:

- 1 Standard experience
- 2 Standard experience + **selfie on top of a pint**
- 3 Standard experience + **lesson on pouring a pint**
- 4 Standard experience + **guided tour + lesson on pouring a pint**



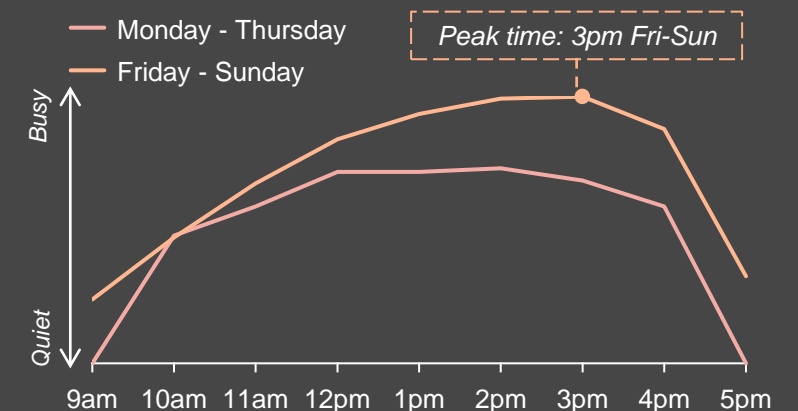
Venue hire for events with up to 2,000 people

Pricing and visitation

Average¹ price per experience

Ticket type	1	2	3	4
Adult	€28	€33	€40	€48
Student/OAP	€26	€28	€33	N/A
Children	€10	N/A	N/A	N/A
Family ²	€64	€73	€80	N/A

Visitation per hour based on days of the week



Dublin Zoo is Ireland’s biggest family attraction; open year-round, they welcomed over one million visitors to their animal habitats and Wild Lights display in 2023

Case study 2/4 – Dublin Zoo

Overview



Attraction type: Zoo, aquarium or open farm

Location: The Phoenix Park, Dublin 8

Opening hours: Jan-Feb: Daily, 09:30-17:00

Mar-Sep: Daily, 09:30-18:00

Oct-Dec: Daily, 09:30-16:00

Visitors in 2023: 1,160,000¹

Length of stay: 2.5 hours

Multiple restaurants and cafes, and a Dublin Zoo gift shop on site.

Offerings

Dublin Zoo is Ireland’s biggest family attraction, home to over 400 animals from around the world, belonging to over 10 different habitats.

- **Standard entry** gives a visitor access to observe all animals across the zoo.
- Various shows and educational talks take place throughout the day, **open for all visitors** to view.



Online booking pricing increases to closer a visitor book to their visit date.

Special case: Dublin Zoo Wild Lights

Dublin Zoo’s Wild Lights open from the end of October to January each year from **6pm-10pm** for a magical night-time experience through an immersive light show.

Wild Lights welcomed a record **270,000 people** in 2022-23.

“I was totally blown away by the impressive displays. Huge light-up flowers and enormous owls greet you on arrival.”

- Dublin Live



Pricing and visitation

Price per ticket

Ticket type	Online ²	Gate	Wild lights
Adult	€20	€26	€26
Student/OAP	€15	€20	€23
Children	€15	€20	€21
Family ³	€57	€73	N/A

The Book of Kells welcomed almost one million visitors in 2023 to see the ancient text, as well as the Old Library, and their new immersive digital experience

Case study 3/4 – The Book of Kells Experience

Overview



Attraction type: Museum / gallery

Location: Trinity College Dublin, Dublin 2

Opening hours: Monday to Saturday: 08:30-19:00
Sunday: 09:30-18:30

Visitors in 2023: 970,000

Length of stay: 1.5 hours

Multiple restaurants and cafes on Trinity campus, and a Trinity gift shop on site.

Offerings

The Book of Kells Experience lets visitors view the ancient Book of Kells, Long Room and Gaia in the Old Library, as well as explore their new digital exhibition.

The **standard experience** includes:

- Self-guided tour through the Book of Kells and Old Library
- Entry to the Immersive Digital Exhibition



Pricing can be variable wherein the price for each experience can vary based on the month of the year.

There are several experiences that visitors can book:

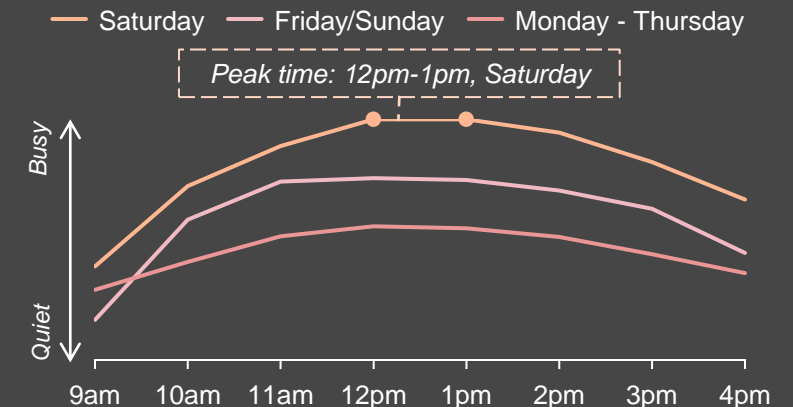
- 1 Standard experience
- 2 Standard experience + 45-minute guided tour through Trinity campus
- 3 Standard experience + guided Old Library tour

Pricing and visitation

Average¹ price per experience

Ticket type	1	2	3
Adult	€24	€34	€65
Student/OAP	€19		
Children	€15		
Family ²	€60		

Visitation per hour based on days of the week



The EPIC Museum, located beside George's Dock is dedicated to the history of Irish emigration, welcoming 360k visitors in 2023, and hosting a range of private events

Case study 4/4 – EPIC The Irish Emigration Museum

Overview



Attraction type: Museum / gallery

Location: CHQ, Custom House Quay, Dublin 1

**Located beside George's dock, a potential site for The Giant*

Opening hours: Daily, 10:00-18:45

Visitors in 2023: 360,000

Length of stay: 2.5 hours

Multiple restaurants and cafes in CHQ building and a museum gift shop on site.

Offerings

The EPIC Irish Emigration Museum is a museum dedicated to exploring Irish culture through the lens of Irish emigration, with multiple exhibitions and interactive displays.

A **standard tour** is self-guided, but visitors can also:

- 1 Purchase an audio guide for **€2pp**
- 2 Book a **guided tour** for an additional **€45 per group**

Taking advantage of the CHQ building, they also offer venue hire

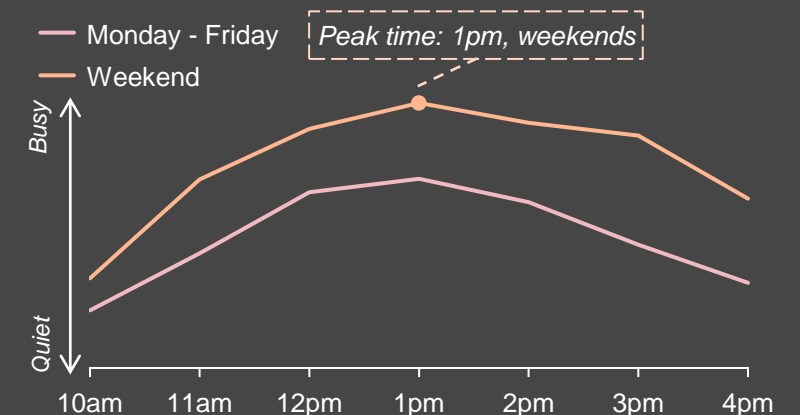
- ◆ The CHQ building can hold up to 800 people, accommodating product launches, brand activations, awards ceremonies and corporate events.
- ◆ The museum itself can cater for up to 180 people, suitable for client and staff entertainment, teambuilding and networking and corporate events.

Pricing and visitation

Price per ticket

Ticket type	Off-peak online	Online	Gate
Adult	€15	€21	€23
Student/OAP	€10	€13	€13
Children	€13	€19	€21
Family ¹	€42	€53	€56

Visitation per hour based on days of the week



Contents

Executive Summary

The Giant Overview

Market Analysis

Available Markets

Competitive landscape

Market Risks

Feasibility Assessment

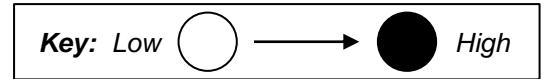
Potential Locations and Other Considerations













Financial Appendix



Risks unique to Ireland such as accommodation and airport passenger constraints, as well as global economic uncertainty pose risk to the Irish tourism industry

Tourism industry market risks



Risk	Description	Likelihood	Impact
Accommodation capacity constraints	<ul style="list-style-type: none"> Tourism accommodation properties are being heavily relied on by the government to house refugees and International Protection applicants, reducing supply for tourists and inflating what they pay for accommodation. 		
Dublin Airport passenger cap	<ul style="list-style-type: none"> Dublin Airport has a yearly 32 million passenger cap which impacts Ireland's ability to grow their overseas tourism base. 		
Cost of living	<ul style="list-style-type: none"> The rise in inflation has increased the cost of running a business in the tourism sector, while consumers are also becoming more cost conscious, risking a loss in cost competitiveness. 		
Labour supply	<ul style="list-style-type: none"> The tourism sector is struggling to recruit, train and retain staff due to Ireland's tightest labour market in many years, with a historically low unemployment rate at the end of 2024, risking labour supply problems. 		
Economic uncertainty	<ul style="list-style-type: none"> Ongoing wars in Eastern Europe and the Middle East pose a risk of reducing travel demand in Europe and increasing already high operating costs due to rising energy costs food prices and supply chain expenses. 		
Over-dependence on North American market	<ul style="list-style-type: none"> Welcoming more holiday makers from North America than Britain in 2023, Irish tourism relies on the high spending of North American tourists. The recent election of US president Donald Trump, poses trade and tariff uncertainty which could impact this travel demand, risking a lower number of US tourists to Dublin. 		

Contents

Executive Summary

The Giant Overview

Market Analysis

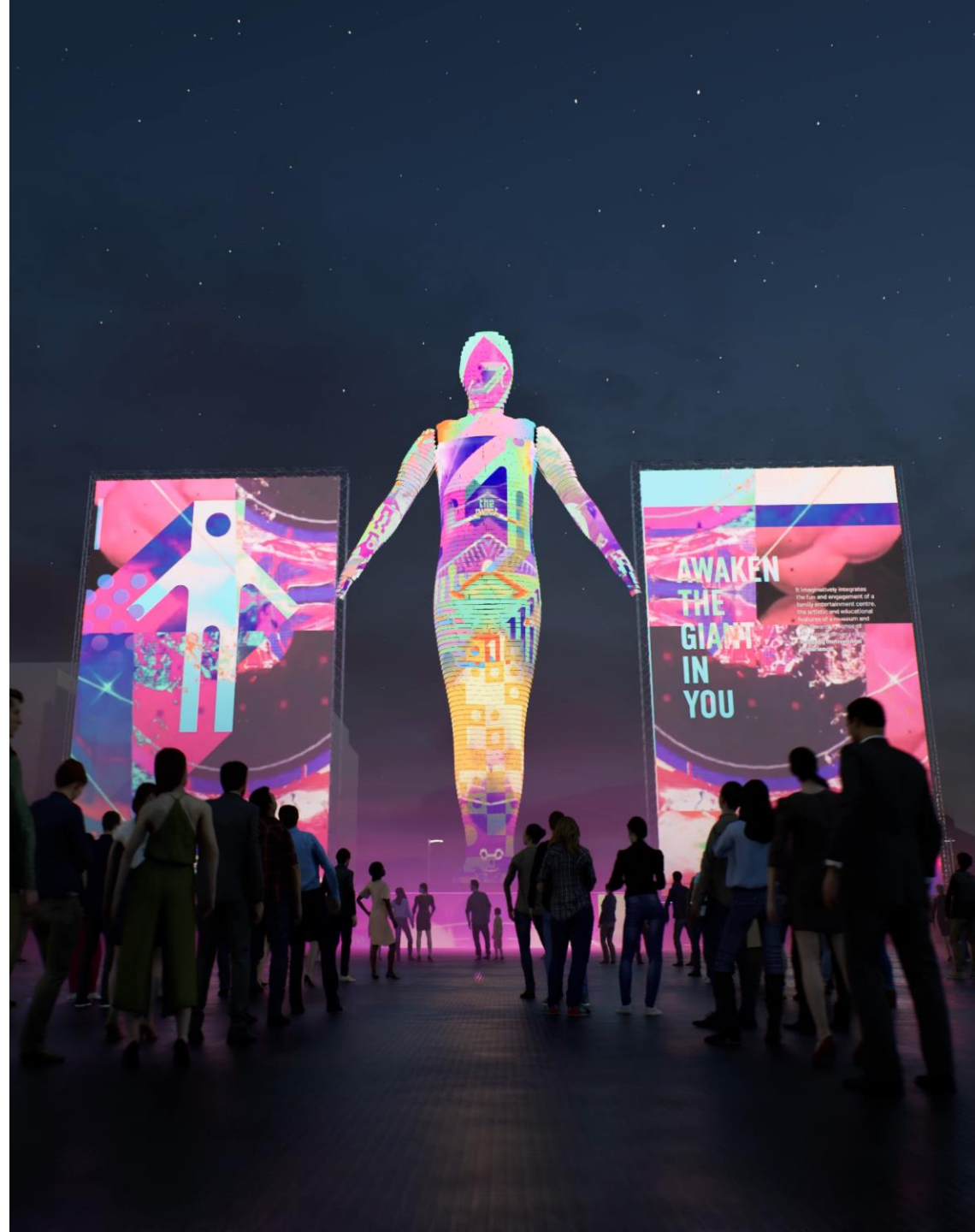
Feasibility Assessment

Revenue Drivers and Assumptions

Cost Drivers and Assumptions

Potential Locations and Other Considerations

Financial Appendix



Operating breakeven assumes that operating expenses alone are covered, while Investment breakeven also covers the CapEx, and Optimistic yields higher profits

Scenarios Summary P&Ls

Annual P&L	Scenario		
	Operating breakeven	Investment breakeven	Optimistic
Visitor numbers	104,650	364,000	841,750
Gross Revenue	€6,052,610	€15,201,850	€27,606,000
COGS	€3,431,336	€6,594,929	€10,598,180
Gross Profit	€3,545,864	€8,606,921	€17,007,820
Overheads	€2,883,513	€2,951,448	€2,951,448
Contingencies	€564,481	€982,582	€1,614,237
EBITDA	€0	€4,672,892	€14,501,671
EBITDA (%)	0.0%	30.7%	45.6%

Contents

Executive Summary

The Giant Overview

Market Analysis

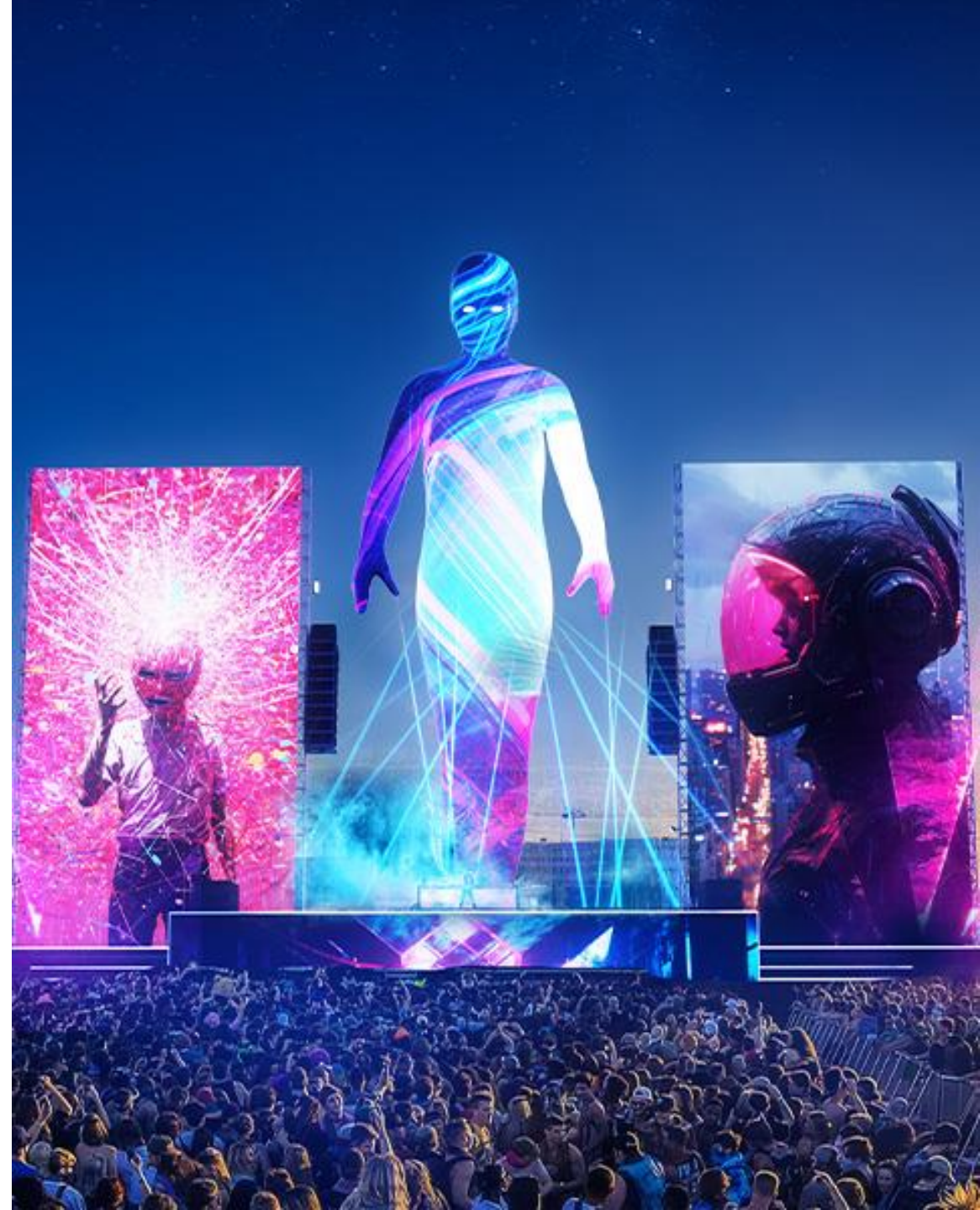
Feasibility Assessment

Revenue Drivers and Assumptions

Cost Drivers and Assumptions

Potential Locations and Other Considerations

Financial Appendix



The Giant will generate revenue from a variety of streams, with visitors being offered the chance to further engage in the experience beyond the admission fee

Revenue drivers

Revenue drivers	Scenario		
	Operating b/e	Investment b/e	Optimistic
1 Admissions	€2,093,000	€7,280,000	€16,835,000
2 Advertising and Sponsorship	€1,750,000	€2,625,000	€3,675,000
3 Gaming	€53,820	€187,200	€432,900
4 Selfies	€1,569,750	€3,071,250	€6,142,500
5 Retail sales	€209,300	€728,000	€1,683,500
6 Food and Beverage sales	€376,740	€1,310,400	€3,030,300
Total Revenue	€6,052,610	€15,201,850	€31,799,200

There is six different revenue generating streams proposed for The Giant which have been included in this study

- 1 **Admissions:** Likely the largest revenue generator, visitors will pay an admission price at the entrance gate to access The Giant experience.
- 2 **Advertising and Sponsorship:** The visual nature and size of The Giant makes it an ideal canvas for brands to advertise on.
- 3 **Gaming:** Management envisions a virtual reality gaming experience, with up to 10 games on offer with each costing €5 to play.
- 4 **Selfies:** One of the unique elements The Giant has to offer, visitors can pay to have themselves scanned and their image displayed on The Giant.
- 5 **Retail sales:** The Giant branded merchandise will be available for sale on site as is typical with many tourist attractions.
- 6 **Food & Beverage:** To encourage visitors to stay on site as long as possible and engage further with The Giant experience, it is assumed food and beverage stalls will be available on site.

The Giant will divide its operating hours as follows between three revenue streams:

- **50%** of the time will be allocated to shows and displays of famous figures
- **25%** of the time to visitor selfie displays
- **25%** of the time to advertisements (plus additional 3 hours for ads when closed to public)

We envisage admission fees likely being the biggest revenue driver, with benchmarking analysis indicating a fair adult price of c.€25

Admissions

Admissions key assumptions



Hours of operation:

- The Giant is impressive at any time of the day however given the light spectacle nature of The Giant, it will be most impressive to view in hours of darkness. Therefore, we have assumed the opening hours to the public as 10:00-23:00.



Number of visitors:

- Our visitor number projections are based off benchmarking of other attractions in Dublin City Centre. 'Operating breakeven' presents the volume we estimate required for the attraction to breakeven on an operating expense basis, 'investment breakeven' presents the volume we estimate required for the attraction to breakeven on an operating expenses and CapEx basis, placing The Giant ahead of EPIC for popularity, and 'optimistic' places it just behind The Book of Kells.



Pricing:

- Benchmarking analysis of other fee-paying attractions in Dublin City Centre show adult pricing in the range of €23-€28. We have assumed €25 for an adult admission to The Giant.
- As is the norm with other attractions, it is assumed The Giant will offer reduced pricing for family, student, and OAP admissions. Taking into account the level of discount offered to these groups by other attractions, we assume an average admission price of €20.

Admissions	Scenario		
	Operating b/e	Investment b/e	Optimistic
Hours of operation for public admission	10:00-23:00	10:00-23:00	10:00-23:00
Number of hours	13	13	13
Visitors per day	299	1,040	2,405
Visitors per year	104,650	364,000	841,750
Adult admission price	€25	€25	€25
Average admissions discount	20%	20%	20%
Average admission price	€20	€20	€20
Yearly admission revenue	€2,093,000	€7,280,000	€16,835,000



The Giant Experience is a thrilling immersive journey set within a 10,000 square foot modular structure, where myth and modernity collide.

Through AR, VR, AI, and holographic storytelling, visitors are transported from ancient times — when giants roamed the earth — through history to the present day, meeting legendary heroes, global icons, and modern changemakers.

The experience culminates in an awe-inspiring finale where guests are invited to “Awaken the Giant in You,” even seeing themselves transformed into giants on the 30-meter Giant statue.

It’s a mesmerizing blend of entertainment, education, and inspiration for all ages.



The Giant provides a unique advertising opportunity for brands, but bespoke ad design, advertising restrictions, and limited hours of darkness may be barriers

Advertising and Sponsorship

Advertising and Sponsorship key assumptions



Advertising hours:

- We assume the attraction can advertise between the hours of 07:00 - 00:00 to capture commuters and the maximum number of hours of darkness, with 07:00-10:00 solely dedicated to advertising and 25% of opening hours also dedicated.



Potential advertising barriers:

- The bespoke shape of The Giant means brands will likely have to create a specialised ad to maximise impact.
- HFSS advertising laws restrict the promotion of unhealthy foods if children are at least 50% of the audience of an advertisements, and alcoholic advertisements will not be allowed (0% alcohol brands may be allowed).
- Brands prefer outdoor light displays during hours of darkness to increase visual impact.



Advertising revenue generation:

- Market analysis of out of home advertising indicates at a high level an attraction of this kind may demand in the range of €7k-€25k for 3-4 hours of advertising during darkness in an evening.
- Given the advertising opportunities will be less during longer days, we have taken capacity utilisation estimates, with each scenario increasing as the number of eyeballs is also increased.

Advertising and Sponsorship	Scenario		
	Operating b/e	Investment b/e	Optimistic
Early morning advertising	07:00-00:00	07:00-00:00	07:00-00:00
Hours of operation for public admission	10:00-23:00	10:00-23:00	10:00-23:00
Advertising time allocation during public opening hours	25%	25%	25%
Total time for ads per day (seconds)	21,600	21,600	21,600
Average length of ads (seconds)	60	60	60
Max number of ad plays per day	435	435	435
Price of advertising takeover per day	€10,000	€12,500	€15,000
Advertising capacity utilisation	50%	60%	70%
Daily advertising revenue	€5,000	€7,500	€10,500
Yearly advertising revenue	€1,750,000	€2,625,000	€3,675,000

Assumptions made about advertising and sponsorship revenue are on the more conservative end of initial conversations with advertising agencies

Advertising and Sponsorship



Ambient Innovations

3 Ardmore Ave, Dublin 7. D07Y4E2
Company Reg No: 604451 Vat No: 03477534HH

25/03/2025

28/03/25

To Whom It May Concern:

The Giant is a ground-breaking next-generation advertising and sponsorship platform, redefining how brands engage with audiences. While large-scale LED displays like The Sphere have captured global attention, The Giant takes this concept further with innovation, versatility and numerous opportunities for significant advertising and sponsorship revenue.

Unlike static installations, The Giant can move from city to city, transforming its towering LED surface into any character—whether a celebrity, a brand ambassador, or an everyday person. It can speak, sing, and interact, creating an immersive, dynamic experience that captivates audiences like never before. With massive side screens enhancing the visual spectacle, The Giant offers an extraordinary platform for brand storytelling, celebration, and high-impact advertising.

We believe The Giant has the potential to transform audience engagement. Positioned in a prime, high-traffic location like George's Dock, Dublin, it could generate an estimated €3 million annually in advertising revenue. Additionally, other out-of-home opportunities within The Giant's environment—such as static advertisements on the back of the flanking screens and various placements throughout the attraction—could bring in an extra €50,000 per month.

Kind Regards,

Stephen McCann
CEO of Sipit Adverts

To Whom It May Concern

We are writing this letter in support of the ambitious and innovative idea to 'awaken the giant within' through the installation of a large scale LED giant unlike anything seen before. At a time when large scale LED's like The Sphere are wowing audiences around the world this concept feels very much of its time.

From a revenue forecast point of view given The Giant can move from city to city, optimizing revenue potential at key moments along with the flexibility of being able to transform its towering LED surface into any character—whether a celebrity, a brand ambassador, or an everyday person. This coupled with two massive flanking screens enhancing the visual spectacle, The Giant offers a unique platform for high-impact advertising.

From our experience in the advertising industry we estimate an installation of this size and impact could command up to €20,000 per day in advertising revenue from a single brand.

Micromedia have worked with Paddy Dunning for over 20 years promoting his variety of unique cultural attractions from The Button Factory to the Rock & Roll museum and Wax museum.

We hope this project will get the necessary support to make it a reality.

Kind Regards

Dave Smith

To Whom It May Concern:

The Giant is a groundbreaking next-generation advertising and sponsorship platform, redefining how brands engage with audiences. While large-scale LED displays like The Sphere have captured global attention, The Giant takes this concept further with innovation and versatility.

Unlike static installations, The Giant can move from city to city, transforming its towering LED surface into any character—whether a celebrity, a brand ambassador, or an everyday person. It can speak, sing, and interact, creating an immersive, dynamic experience that captivates audiences like never before. With massive side screens enhancing the visual spectacle, The Giant offers an extraordinary platform for brand storytelling, celebration, and high-impact advertising.

We believe The Giant has the potential to revolutionize audience engagement, and in prime, high-traffic locations, we estimate it will generate between €25,000 and €30,000 per day in advertising revenue.

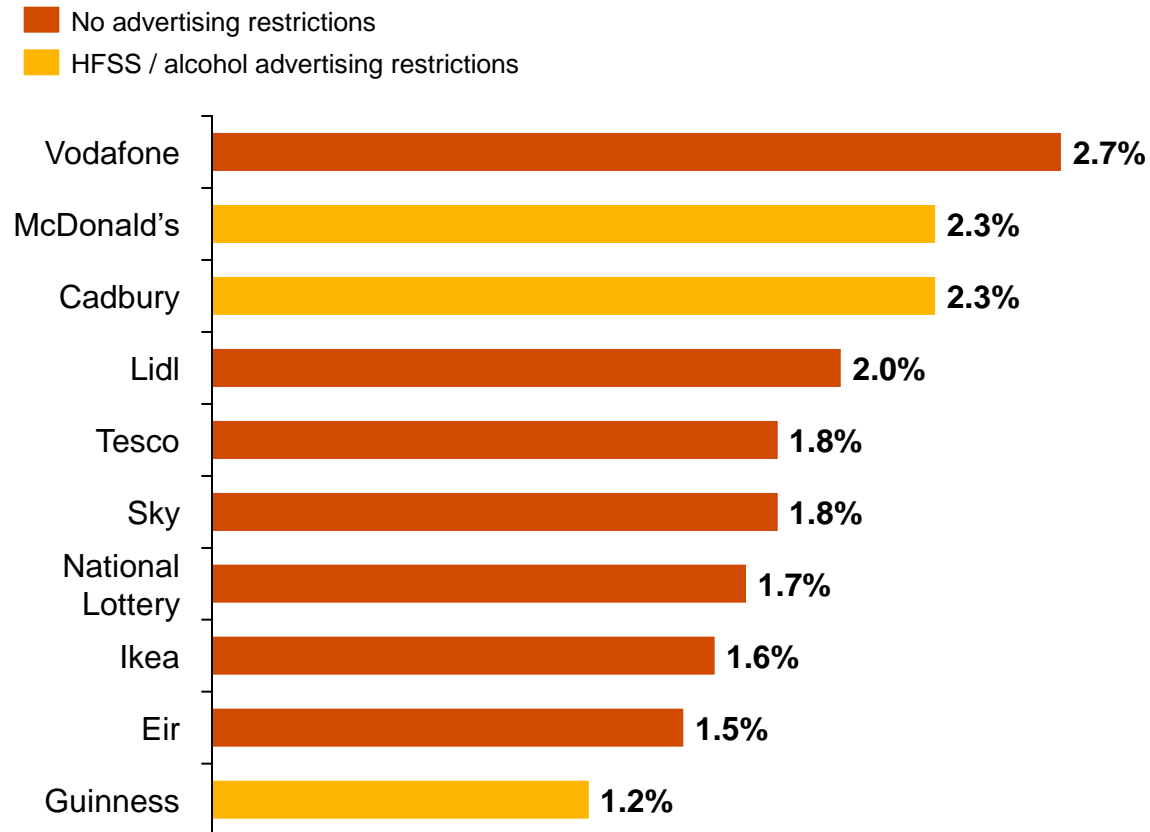
Antoin Dempsey
Managing Director

For any brands who may wish to advertise, The Giant can offer bespoke advertising as part of the contract or brands may do this themselves

Advertising and Sponsorship

Top 10 OOH¹ advertising brands

share of value %, 2024



Two potential models for The Giant advertising



Bespoke ad creation as part of a contract:

As The Giant is a bespoke canvas to advertise upon, The Giant can offer to create tailored advertising for brands that maximises the impact of the advertisement. This is a model the Las Vegas MSG Sphere offers.



Advantages: The Giant can charge higher advertising fees to inhouse the production of brand advertisements and offers the opportunity to brands who may not have the creative design capabilities themselves.



Disadvantages: The Giant requires an inhouse creative design team which must collaborate with brands.



Brand ownership of advertisements

The Giant simply offers brands the opportunity to have their self created advertisements displayed on The Giant.



Advantages: The Giant does not need to collaborate with brands on ad creation.



Disadvantages: The Giant cannot charge as high fees and some brands may not have the design capabilities required to create a bespoke ad tailored to The Giant.

Augmented and Virtual Reality gaming adds to the array of immersive experiences on offer, with up to 10 different games centred around The Giant concept

Gaming

Gaming key assumptions:



Gaming concept

- Management envisions a virtual reality gaming experience, with up to 10 games on offer with each costing €5 to play, paid for through an app on users phones.
- Games will centre around The Giant concept, with the choice of 10 different games aimed at suiting all interests.
- The VR gaming experience offers further incentive for visitors to pay the admission entrance to avail of an immersive experience.



Penetration

- We have made conservative assumptions that only 10% of visitors choose to play on average 1 game each.
- This could be considered a conservative penetration rate. Should the gaming experience prove compelling this revenue stream has the potential to outperform any of the scenarios presented.

Gaming	Scenario		
	Operating b/e	Investment b/e	Optimistic
Price per game	€5	€5	€5
Penetration rate	10%	10%	10%
Avg. number of games per visitor	1	1	1
Visitors per day	299	1,040	2,405
Total games played per day	30	104	241
Daily gaming revenue	€150	€520	€1,203
Yearly gaming revenue	€53,820	€187,200	€432,900



Visitor selfie displays are one of the most unique elements of The Giant and provide a compelling reason to pay into the site

Selfie displays

Selfie displays key assumptions:



Selfie concept:

- Up to 25% of The Giant's screen time will be dedicated to displaying images of visitor selfies using volumetric scanners on site.
- Visitors can pay €30 to have their image displayed on The Giant for 20-60 seconds depending on admission uptake.
- We view this opportunity as one of the most compelling reasons to pay the admission fee for The Giant.



Penetration

- The limiting factor for selfie generation is the time allocated to selfies during the day, which impacts the assumed penetration of the visitor numbers in each scenario.
- We have assumed 50% of a maximum potential of 65% penetration in the operating breakeven scenario, while in the investment breakeven and optimistic scenarios, the maximum penetration rate is achieved.
- Should this revenue stream proves more profitable than others, it can be allocated a higher proportion of operating time to it.

Selfies	Scenario		
	Operating b/e	Investment b/e	Optimistic
Selfie allocation of screen time	25%	25%	25%
Total time for selfies per day (seconds)	11,700	11,700	11,700
Duration per display (seconds)	60	40	20
Max number of selfies per day	195	293	585
Max visitor penetration rate for selfies	65%	28%	24%
Assumed penetration rate for selfies	50%	28%	24%
Visitors per day	299	1,040	2,405
No. of selfies per day	150	293	585
Cost per selfie	€30	€30	€30
Daily selfie revenue	€4,485	€8,775	€17,550
Yearly selfie revenue	€1,569,750	€3,071,250	€6,142,500

As is typical with other tourist attractions, The Giant intends to have Retail and F&B offerings on site, to increase revenue and provide incentive to pay in and remain

Retail and Food & Beverage

Retail key assumptions



Average sale value:

- Management intend to sell merchandise such as magnets, keyrings etc. while also selling higher cost items such as The Giant branded clothing.
- Industry reports indicate roughly half of the admission fee is spent on merchandise at visitor attractions, leading to an average retail transaction assumption of €10.



Penetration:

- Assumption that 20% of visitors buy merchandise, which could grow substantially should The Giant grow in recognisability and demand for branded merchandise increases.

Retail	Scenario		
	Operating b/e	Investment b/e	Optimistic
Avg. price per transaction	€10	€10	€10
Visitors per day	299	1,040	2,405
Penetration	20%	20%	20%
Daily retail revenue	€598	€2,080	€4,810
Yearly retail revenue	€209,300	€728,000	€1,683,500

Food & Beverage key assumptions



Average sale value:

- Management intend to offer F&B on site to encourage both entry into The Giant and increase the length of stay of the average visitor.
- Industry reports indicate roughly 60% of the admission fee is spent on merchandise at visitor attractions, leading to an average F&B transaction assumption of €12.



Penetration:

- Assumption that 30% of visitors buy F&B. While secluded attractions or those with longer visit times typically have higher rates, we've revised this down to 30% due to Dublin's diverse F&B options.

Food & Beverage	Scenario		
	Operating b/e	Investment b/e	Optimistic
Avg. sale value	€12	€12	€12
Visitors per day	299	1,040	2,405
Penetration	30%	30%	30%
Daily F&B revenue	€1,076	€3,744	€8,658
Yearly F&B revenue	€376,740	€1,310,400	€3,030,300

Contents

Executive Summary

The Giant Overview

Market Analysis

Feasibility Assessment

Revenue Drivers and Assumptions

Cost Drivers and Assumptions

Potential Locations and Other Considerations

Financial Appendix



COGS make up a significant portion of the cost base, with these costs variable in nature and as such growing in each scenario

COGS

COGS	Scenario			Assumptions
	Operating BE	Investment BE	Optimistic	
Standalone Staffing	€808,500	€1,309,418	€2,232,163	20 staff across the day in op. BE, growing to 32 and 55 in investment BE and optimistic
Security on Site	€343,000	€557,375	€943,250	8 security across the day in op.BE, growing to 13 and 22 in investment BE and optimistic
Repairs and Maintenance	€250,000	€300,000	€350,000	Labour and material cost assumptions for R&M throughout the year
IP, Software Licence & Upgrades	€605,261	€1,520,185	€3,179,920	Royalty fees at 10% of revenue as provided by TGC management
Scanning Costs	€313,950	€614,250	€1,228,500	20% of selfie revenue attributed to scanning costs
Advertising Agency	€262,500	€393,750	€551,250	15% of advertising revenue assumed to go to agency handling advertising contracts
Retail costs	€146,510	€509,600	€1,178,450	30% profit margin assumed on retail sales, with COGS constituting 70% of revenue
Food and Beverage costs	€346,601	€1,205,568	€2,787,876	8% profit margin assumed on retail sales, with COGS constituting 92% of revenue
Public Liability Insurance	€100,000	€150,000	€200,000	Insurance against injury for visitors to the site scaling as visitor numbers grow
Gaming IT Support	€10,000	€34,783	€80,435	IT support for gaming servers scaling as user numbers grow
Total COGS	€3,186,322	€6,594,929	€12,731,844	
% of Gross Revenue	53%	43%	40%	

Overheads are fixed and independent of revenue levels achieved, a further contingency of 10% of total costs has been incorporated into each scenario

Overheads

Overheads	Scenario			Assumptions
	Operating BE	Investment BE	Optimistic	
Utilities	€637,448	€637,448	€637,448	Electricity costs estimated based on kWh prices and usage and assumption of other utilities costs
Overnight Security	€120,000	€120,000	€120,000	Estimate based on one overnight guard and CCTV and alarm response system
Financial / Legal Admin	€100,000	€100,000	€100,000	TGC management estimate
Computer / Web	€75,000	€75,000	€75,000	TGC management estimate
Game Development	€50,000	€50,000	€50,000	Estimate of cost to develop the VR gaming concept management intends to build
Marketing & Promotional Activity	€500,000	€1,000,000	€1,000,000	Marketing budget within management control
Salaried Staff	€469,000	€469,000	€469,000	Based on a General Manager, 2 Supervisors and additional management payroll costs
The Giant and Property Insurance	€300,000	€300,000	€300,000	TGC management estimate
Travel and Accommodation	€50,000	€200,000	€200,000	Travel and Accommodation within management control
Total Overheads	€2,301,448	€2,951,448	€2,951,448	
Miscellaneous Contingencies	€564,841	€982,582	€1,614,237	Contingency of 10% of total costs (COGS + Overheads) for each scenario
Total Overheads incl. Contingencies	€2,866,288	€3,934,029	€4,565,685	
% of Gross Revenue	47%	26%	14%	

The Giant offers a unique opportunity for Dublin which aligns with the city's digitisation ambitions, and can be viable based on the assumptions provided

Feasibility study summary

The Giant offers a novel opportunity aligned with Dublin's ambitions as a forward-thinking, globally connected capital.

This next-generation attraction will not only contribute to Dublin's tourism landscape but can also serve as a dynamic cultural and economic catalyst for the city.

Key advantages to Dublin

Visually striking icon

Unique visitor experience

Economic and social benefits

Global digital and advertising platform

Premier venue for special events

Diverse and sustainable revenue streams

Key features of the Giant

World's tallest moving statue

The ultimate selfie opportunity

Immersive Hi-Tech exhibition

XR gaming integration

Iconic backdrop for festivals and celebrations

Social media phenomenon

The Giant could be a viable opportunity for placement in Dublin City, based on several core assumptions holding true:

The Giant can be the 46th most visited fee-paying attraction in Ireland (105k annual visitors).

Visitors are willing to pay for admission (€20 average price), which is benchmarked against similar attractions nearby.

A small percentage (10-25%) are willing to pay for additional services, such as selfies, gaming, F&B and retail.

Companies want to advertise their brands on The Giant, with full-day takeovers costing €10k-€15k (but can be split between multiple sponsors).

Operating costs are in-line with management assumptions and industry benchmarks.

A suitable location can be found for The Giant, with sufficient footfall and transportation links to facilitate attendance.

Contents

Executive Summary

The Giant Overview

Market Analysis

Feasibility Assessment

Potential Locations and Other Considerations

Financial Appendix

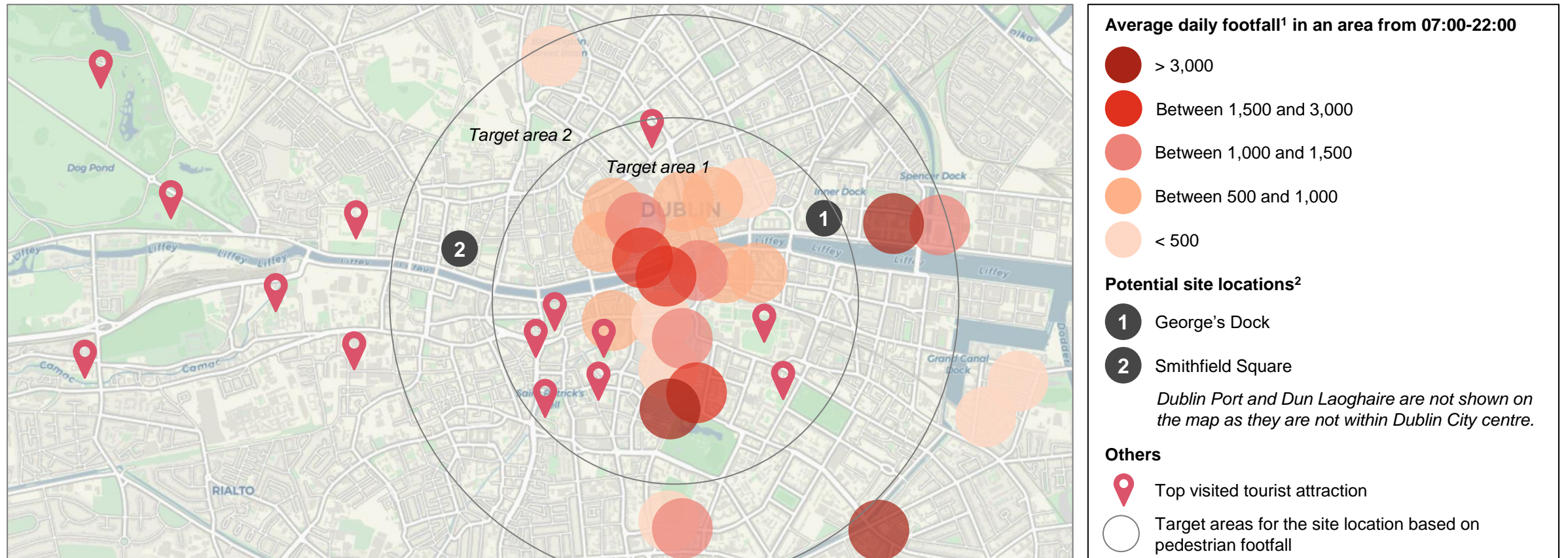


Based on pedestrian footfall data for Dublin City, target areas for The Giant's site location have been identified, and mapped with top visited attractions in Dublin

Target areas for site location

Dublin City pedestrian footfall

Density of footfall, 2024



Four potential site locations have been identified in Dublin and evaluated against criteria such as location, footfall, accessibility and services or attractions nearby

Summary of potential site locations



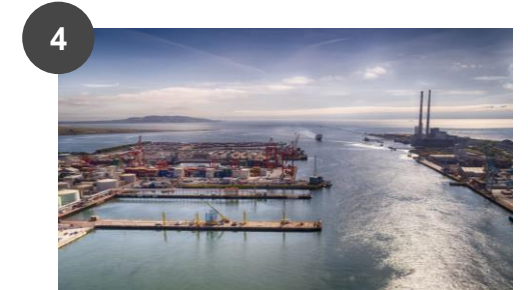
George's Dock



Smithfield Square



Dun Laoghaire



Dublin Port

Location	North Wall, Dublin 1	Smithfield, Dublin 7	South County Dublin	Dublin Port, Dublin 1
Est. capacity	c. 5,000 square metres	c. 7,000 square metres	<i>Dependent on exact site location</i>	<i>Dependent on exact site location, space unlikely to be an issue</i>
Organic footfall	Site located in target area 1 based on high pedestrian footfall	Site located in target area 2 based on high pedestrian footfall	Site located outside of high pedestrian footfall areas	Site located outside of high pedestrian footfall areas
Accessibility ¹	High	High	Low	Medium
Services ² nearby	✓	✓	✓	✗
Attractions ³ (<1km)	✓	✓	✗	✗

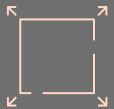
George's Dock has a large open space that is accessible by foot, car or public transport, amid a busy corporate and residential area

Potential site location 1/4 – George's Dock

Overview



Features



George's dock has remained unused for many years, despite demand from residents to fill the site and multiple attempts by Dublin City Council to propose plans.



The site is amid a corporate hub, surrounded mainly by office space and with a small amount of residential some distance away.



The site looks out on to the Liffey giving onlookers high accessibility for viewing, much like how the Convention Centre or Custom House can be seen from across the Liffey.

Location	North Wall, Dublin 1
Capacity	c. 5,000 square metres
Footfall	<ul style="list-style-type: none"> • Site location in target area 1 based on high pedestrian footfall • Site is busiest during peak work commute hours • Site is quietest on weekends
Accessibility	<ul style="list-style-type: none"> • Less than 5-minute walk from Connolly Station • At George's Dock Red Luas line stop • At multiple Dublin Bus and Bus Éireann route stops • 15-minute walk from Trinity College Dublin • IFSC and convention centre car parks near site
Services nearby	<p>Cafes and restaurants located at:</p> <ul style="list-style-type: none"> • Mayor Square • The CHQ Building
Attractions nearby	<ul style="list-style-type: none"> • EPIC Irish Emigration Museum – 0m away • Jeanie Johnston – 0m away • The National Wax Museum Plus – 1km away

Smithfield Square lies in the bustling area of Smithfield in North Dublin City and already has people already attracted to the vibrant area daily

Potential site location 2/4 – Smithfield Square

Overview



Features



Smithfield has been described as an ‘up-and-coming’ area in Dublin City, bustling with students, young professionals and families living in the same space.



The area has been coined the ‘coolest neighbourhood’ in Europe by global media and hospitality brand Time Out, attracting young people to its vibrant pubs and restaurants.



Smithfield square sits just 200 metres in from the Liffey, although surrounded on both sides by apartment buildings, the space is open-ended and accessible for viewing.

Location

Smithfield, Dublin 7

Capacity

c. 7,000 square metres

Footfall

- Site location in target area 2 based on high pedestrian footfall
- Site is busiest outside of typical working hours, and on weekends
- Site is quietest between 09:00 and 17:00 on weekdays

Accessibility

- At Smithfield Red Luas line stop
- 15-minute walk from Temple Bar
- Smithfield Market Car Park on site

Services nearby

The site is surrounded by cafes, restaurants, bars and cinemas

Attractions nearby

- Jameson Distillery Bow Street - 0m away
- 14 Henrietta Street - 900m away
- Christ Church Cathedral - 1km away
- Dublinia - 1km away

Dun Laoghaire is a busy, family friendly village by the sea in South County Dublin, often visited on day trips by Dublin locals and tourists

Potential site location 3/4 – Dun Laoghaire

Overview



Features



Dun Laoghaire is an idyllic seaside village in South County Dublin, home primarily to families and young professionals.



Accessible by DART, the village is visited by Dublin residents weekly to swim at the iconic Forty Foot and visit the Sunday markets in People's Park, as well as use the newly built library.



With the pier enclosing Dun Laoghaire harbour, The Giant statue located near the seafront would have excellent accessibility for viewing.

Location 1	Between Old Dunleary Road and Longford Place
Location 2	Petrol Filling Site near to The Purty Kitchen, Old Dunleary Road
Capacity	Dependent on exact site location
Footfall	Site location is outside of high pedestrian footfall areas
Accessibility	<ul style="list-style-type: none"> • Dun Laoghaire DART Station in the centre of the area • Area served by multiple Dublin bus routes • Accessible by car
Services nearby	Several cafes, restaurants and bars in the town centre
Attractions nearby	<p>No tourist attractions in this location, other activities include:</p> <ul style="list-style-type: none"> • Dun Laoghaire baths • The Forty Foot

Dublin Port has been earmarked for redevelopment and there is potential to locate The Giant by the old Odlums Flour Mill

Potential site location 4/4 – Dublin Port

Overview



Features



Dublin Port is Ireland's largest freight and passenger port which currently sees very little footfall. As part of Masterplan 2040 plans to increase capacity of the port, there is also plans to increase public amenities in the area.



The area is located at the mouth of the Liffey, and not far from the 3Arena which currently can cater for crowds of up to 13,000 people.



Dublin Port is a large, flat open space and should have excellent viewing accessibility

Location

Dublin Port, Dublin 1

Capacity

Dependent on exact site location, unlikely to be constrained

Footfall

Site location is outside of high pedestrian footfall areas

Accessibility

- 10-15 minute walk from Point Red Luas line stop
- Car parking near 3Arena which is 10-15 minute walk
- Buses also service the 3Arena

Services nearby

- 3Arena
- Currently none in Dublin Port but cafés and restaurants likely to locate here if redeveloped for public use

Attractions nearby

No tourist attractions in this location, however as part of redevelopment plans there have been proposals for an artist campus and creation of a social hub in the area

Considerations around protests to the attraction's installation and the ability to advertise under ASAI regulations are vital to site location selection

Additional considerations for site location

Considerations	
Protests to sites	Advertising on site subject to ASAI regulations
The possibility of facing residents near the site's protests against the attraction.	Advertising regulations in relation to HFSS foods must be stringently followed at the site location.

The installation of an attraction like The Giant may cause disputes with residents in the area for the following reasons:

- **Noise and disruption** during the installation process..
- The Giant could be an **'eye sore'** and cause **noise and light pollution** to the area.
- The area and transport links could become **overcrowded with people**.

Examples

- A white water rafting centre in **George's Dock** was proposed by Dublin City Council in 2019. Facing a lack of financial and public support, the plans were scrapped.
- **Dun Laoghaire** library's plans faced heavy criticism due to the building's proposed size and design, but was built despite the public scrutiny.

A code applies to the marketing of High Fat, Salt and Sugar (HFSS) foods and non-alcoholic beverages. Guidelines relevant to the Giant are:

- 1 No medium should be used to advertise HFSS products if **more than 50% of its audience is under 15 years** of age.
- 2 **Locations primarily used by children** such as schools, creches and etc, shall be **free from all forms** of marketing communication for HFSS foods.

Additional relevant rules for 'out of home' advertising are:

- 1 HFSS product categories will be limited to **33% of the available space per cycle** and format
- 2 Displays of HFSS foods will be **restricted from 100 metres of school gate** for large roadside billboard formats (a category The Giant could fit in to).

Mitigation	
<ul style="list-style-type: none"> • Ensure that there is a focus on the benefits The Giant will have on the area around the site, such as boosting sales in the shops, cafes, restaurants and bars in the area. • Mitigate noise and light pollution concerns with locals by explaining the nature of the attraction, its light and audio displays and that there is not strobe lighting effects, 	<ul style="list-style-type: none"> • Ensuring the site is not within 100 metres of a school gate, The Giant will be able to advertise HFSS products 33% of the time. • However, if 50% of The Giant's audience is under 15, no HFSS products can be advertised at all.

Contents

Executive Summary

The Giant Overview

Market Analysis

Feasibility Assessment

Potential Locations and Other Considerations

Financial Appendix



Capital Expenses

Management CapEx assumptions

25m Statue with viewing tower CapEx Overview

Estimated Budget		
Engineering	€	450,000
LED Design & Fabrication	€	6,959,134
Fabrication and Design Structure and Movement	€	7,834,500
3D Volumetric Scanners	€	789,000
Giant Experience & Installation	€	3,000,000
Stage, PA, Lights, Lasers & Installation	€	3,500,000
Giant Company Development costs	€	2,000,000
Design, permits	€	200,000
System Integration, Controls, software etc	€	1,000,000
Insurance	€	500,000
Net Cost	€	26,232,634
Contingency	10% €	2,623,263
Total Estimated Budget	€	28,855,897



TGC management predict that CapEx assumptions could be **lower**. The estimated budget is based on **conservative assumptions** and may be lower for The Modular Giant which will be built in Dublin.

Cashflow appraisal based on scenario 2 – investment breakeven

Cashflow assumptions

Cashflow assumptions

Variable	Assumption
Volume of visitors in year 1 (scenario 2)	364,000
Revenue	Revenue will grow at 5% per year for the first three years, based on the expected return to higher tourism numbers in Ireland post-Covid. Revenue will then grow year on year at an inflation rate of 2%.
Cost of goods sold (COGS)	COGS will grow at 5% per year for the first three years, based on the expected return to higher tourism numbers in Ireland post-Covid. COGS will then grow year on year at an inflation rate of 2%.
Operating expenses (incl. contingency spend)	Operating expenses will increase year on year with an inflation rate of 2%.
Financing	A debt to equity ratio of 50/50 is assumed.
Capitalised income	No capitalised income is included in the cashflow. TGC management may choose to exit the investment after The Giant's 7 year lifespan is complete, in which a 12.5% capitalisation rate would be typical of a well performing attraction.
Capex	CapEx is c. €29m based on The Giant Company's assumptions. This could be lower in actuality, depending on the site location and which type of Giant is built.
Debt servicing	The debt will be paid back over 7 years at an interest rate of 5% based on current borrowing rates.
Ongoing reinvestment	It is assumed that reinvestment will be required. There will be yearly reinvestment of 6% of revenue.



- The investment breakeven scenario is based on the **volume of visitors required** to cover operating expenses and earn back capital expenses (the initial investment).
- Given The Giant's lifespan of **7 years**, the volume of visitors needed yearly to reach investment breakeven by the **end of this period** is used.
- The cashflow shows the yearly net cash flow up to year 7 where cumulative cash flows are equal to 0, yielding an **IRR (internal rate of return) of 0%**.

Cashflow forecast based on scenario 2 - investment breakeven

Cashflow forecast (EUR) for investment breakeven scenario

	Total	2025 Year 0	2026 Year 1	2027 Year 2	2028 Year 3	2029 Year 4	2030 Year 5	2031 Year 6	2032 Year 7
Source of funds									
Gross revenue	120,456,061	-	15,201,850	15,961,943	16,760,040	17,598,042	17,950,002	18,309,002	18,675,183
Less: Cost of goods sold	52,256,744	-	6,594,929	6,924,676	7,270,909	7,634,455	7,787,144	7,942,887	8,101,744
Gross margin	68,199,317	-	8,606,921	9,037,267	9,489,130	9,963,587	10,162,859	10,366,116	10,573,438
Less: Operating expenses (incl. contingency)	29,246,688	-	3,934,029	4,012,710	4,092,964	4,174,823	4,258,320	4,343,486	4,430,356
EBITDA	38,952,629	-	4,672,892	5,024,557	5,396,166	5,788,763	5,904,539	6,022,630	6,143,082
Financing									
Equity	14,427,949	14,427,949	-	-	-	-	-	-	-
Borrowing	14,427,949	14,427,949	-	-	-	-	-	-	-
Total financing	28,855,897	28,855,897	-	-	-	-	-	-	-
Capitalised income	-	-	-	-	-	-	-	-	-
Total sources of funds	67,808,526	28,855,897	4,672,892	5,024,557	5,396,166	5,788,763	5,904,539	6,022,630	6,143,082
Use of funds									
Capital costs	28,855,897	28,855,897	-	-	-	-	-	-	-
Total capital costs	28,855,897	28,855,897	-	-	-	-	-	-	-
Debt service									
Interest	3,026,100	-	721,397	632,796	539,764	442,080	339,512	231,816	118,735
Principal	14,427,949	-	1,772,038	1,860,640	1,953,672	2,051,356	2,153,923	2,261,619	2,374,700
Total debt service	17,454,048	-	2,493,435	2,493,435	2,493,435	2,493,435	2,493,435	2,493,435	2,493,435
Ongoing reinvestment									
Ongoing reinvestment	7,069,215	-	861,945	905,042	950,294	1,055,882	1,077,000	1,098,540	1,120,511
Total reinvestment	7,069,215	-	861,945	905,042	950,294	1,055,882	1,077,000	1,098,540	1,120,511
Total uses of funds	53,379,161	28,855,897	3,355,380	3,398,478	3,443,730	3,549,318	3,570,436	3,591,976	3,613,946
Net cash flow	14,429,366	-	1,317,511	1,626,079	1,952,437	2,239,446	2,334,103	2,430,654	2,529,136
Cash flow for equity									
Net cash flow	14,429,366	-	1,317,511	1,626,079	1,952,437	2,239,446	2,334,103	2,430,654	2,529,136
Less: Equity	14,427,949	14,427,949	-	-	-	-	-	-	-
Net cash flow for equity	1,417	(14,427,949)	1,317,511	1,626,079	1,952,437	2,239,446	2,334,103	2,430,654	2,529,136
Cumulative net cash flow for equity		(14,427,949)	(13,110,437)	(11,484,358)	(9,531,921)	(7,292,476)	(4,958,373)	(2,527,719)	1,417
Equity IRR and NPV									
Internal rate of return		0.00%							



Thank you

©2025 PwC. All rights reserved.

PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see [pwc.com/structure](https://www.pwc.com/structure) for further details.

Disclaimer: This content is general information purposes only, and should not be used as a substitute for consultation with professional advisors.

GEORGES DOCK EVENTS, SPONSORSHIP AND REVENUE IDEAS

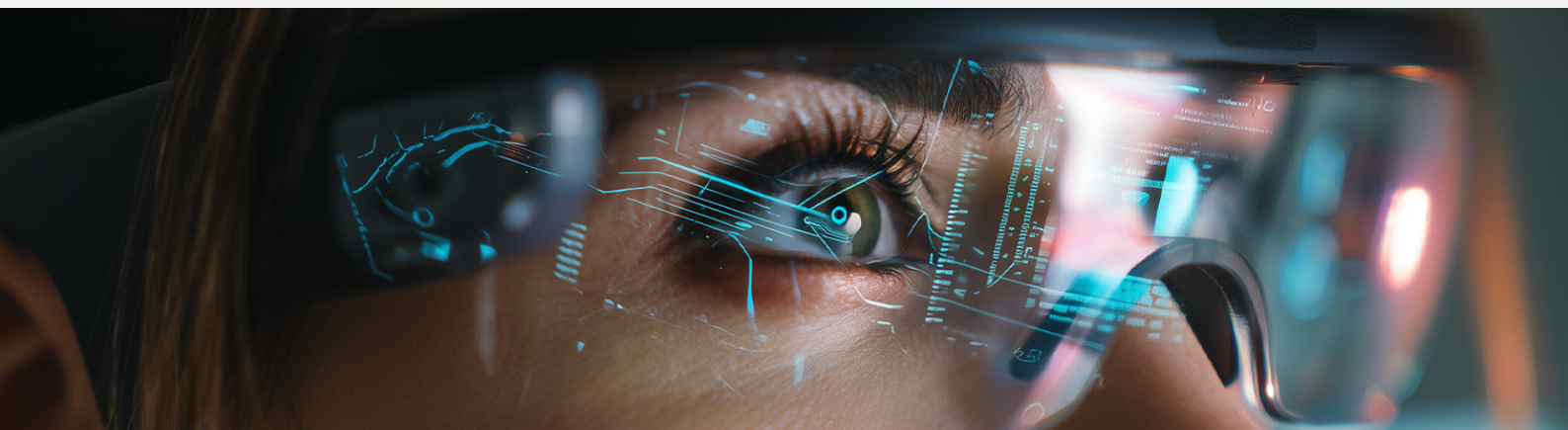
the
giant

SEASONAL AND CULTURAL FESTIVALS



SPRING FESTIVALS:

- **Bealtaine Celebration:** Revive Celtic traditions with fire displays, storytelling, and live music.
- **Tech Spring Expo:** Showcase local startups, AI, VR, AR, and new tech innovations.



SEASONAL AND CULTURAL FESTIVALS

the
giant

SUMMER HIGHLIGHTS:

- **Lúnasa Summer Festival:** Irish food, craft beer, music, and dance.
- **Outdoor Film Festival:** Weekly movie nights under the stars.
- **River Fest:** Capitalise on Georges Dock's proximity to water with water sports, boat parades, and seafood markets.



AUTUMN EVENTS:

- **Harvest Festival:** Farmers' market with live demonstrations, farm-to-table experiences, and family activities.
- **Octoberfest Dublin:** Partner with breweries and create a Bavarian-style beer fest.



SEASONAL AND CULTURAL FESTIVALS

the
giant

WINTER AND HOLIDAY SPECIALS:

- **Christmas Village:** Ice skating rink, Christmas market, light displays, and festive performances.
- **New Year Countdown:** Host Dublin's New Year's Eve party with lightshows and live concerts.



IRISH HERITAGE FESTIVALS:

- **St. Patrick's Week:** Parade viewing parties, live music, and an immersive Irish culture experience.
- **Bloomsday:** Literary events, costume contests, and readings from **Ulysses**.



UNIQUE THEMATIC EVENTS

the
giant

A MODEST PROPOSAL 2029:

- Satirical art installations and performances commemorating Jonathan Swift's work.



250TH ANNIVERSARY OF THE DECLARATION OF INDEPENDENCE:

- Irish-American cultural celebration with live acts, thematically apt historical characters and digital production on The Giant and flanking screens, American food festival, arts and craft market, symposia and speeches featuring dignitaries, celebrities, etc.



FAMILY AND CHILDREN'S PROGRAMMING



FAMILY DAYS AND NIGHTS:

- Curated festivals and events including shows, educational and entertaining activities, street performers and fun food options.
- Productions and pop-up events created in association with Irish children's-based organizations including The Ark, Macnas, Footsbarn, other performing and visual arts organizations and smaller ensembles and collectives, etc.c.

Events in Conjunction with Dublin City Council, Fáilte Ireland, Etc.



CORPORATE AND EXPERIENTIAL EVENTS



Year-Long Tech Expo:

- Partner with tech giants like Google, Intel, Amazon, Meta, etc. to feature cutting-edge technology and host launches.

Corporate Gatherings:

- Exclusive meeting spaces for major Dublin-based companies like PwC, KPMG, and others.
- Product launches and trade shows for the tech, pharmaceutical, and financial sectors.

Interactive Experiences:

- Immersive VR/AR exhibits tied to Irish history and innovation.
- STEM-focused workshops for schools.

Global and Local Activations:

- Partner with airlines (Delta, United, Etihad, Aer Lingus, Ryanair) for aviation showcases.
- Collaborate with banks to host fintech fairs and investment events and other corporate sectors.



ART AND CULTURE SPACES

the
giant

Art Park in the Sky:

- Rotating exhibits from local and international artists.
- Workshops and installations for youth and emerging artists.
- Community art exhibits on and at The Giant.

Performing Arts Hub:

- Host plays, stand-up comedy, and contemporary dance performances.
- Partner with the Abbey Theatre, Gaiety School of Acting, and Dublin-based arts organizations for collaborative events.

Digital Art and NFT Showcase:

- Use digital screens to feature NFTs and cutting-edge digital art and motion graphics, partnering with tech firms and galleries.



REVENUE GENERATORS TICKETED EVENTS



- Entry for festivals, exhibitions, and performances.
- VIP packages for exclusive experiences (e.g., rooftop views, backstage passes).

ADVERTISING REVENUE OPPORTUNITIES INNOVATIVE ADVERTISING AND BRAND PARTNERSHIPS

The Giant provides a unique and dynamic platform for brands to engage with audiences in creative ways. Here are innovative ideas to attract both local and global brands:

1. Digital Advertising on The Giant

- **Dynamic LED Displays:** Leverage The Giant's surfaces as large, programmable screens to display brand advertisements, animations, or interactive visuals.
 - **Local Brands:** Feature rotating ads for Dublin businesses like cafés, breweries, and startups.
 - **Global Brands:** Offer prime slots to tech companies, airlines, and luxury brands for high-visibility advertising.
- **Interactive Ads:** Allow visitors to engage with brand content via QR codes or AR experiences projected on The Giant.

ADVERTISING REVENUE OPPORTUNITIES INNOVATIVE ADVERTISING AND BRAND PARTNERSHIPS



2. Brand Activations

- **Immersive Experiences:**

- Collaborate with brands to host experiential marketing campaigns (e.g., a VR activation sponsored by Meta or an outdoor gear showcase by The North Face).
- Create “takeover days” where a single brand decorates The Giant and Georges Dock with themed activities and pop-ups.



- **Pop-Up Installations:**

Partner with brands for interactive pop-up events, such as:

- **Nike:** A fitness challenge or sneaker customization workshop.
- **Guinness:** A heritage tasting lounge during festivals.

ADVERTISING REVENUE OPPORTUNITIES INNOVATIVE ADVERTISING AND BRAND PARTNERSHIPS



3. Event Sponsorship Opportunities

- **Naming Rights:**
 - Offer sponsorships for the entire Giant or key events or spaces (e.g., “Google Innovation Festival” or “Amazon Lúnasa Fest”).
- **Event Zones:**
 - Brands can sponsor themed areas, like a “Samsung Tech Corner” showcasing gadgets or a “Jameson Lounge” for whiskey tasting.
- **Brand Integration:**
 - Incorporate sponsor products into festival activities, such as giveaways or sampling (e.g., Coca-Cola at summer festivals, other brand/category exclusive branding deals and activations).

4. Physical Advertising Spaces

- **Mapping:**
 - Rent The Giant’s surface for large-scale ads, creating eye-catching visuals visible across Dublin.
- **Interactive Signage:**
 - Use AR and motion-sensitive tech for brand billboards and digital kiosks around Georges Dock. Brand all spaces and surfaces including umbrellas, containers, flags, banners, etc.

ADVERTISING REVENUE OPPORTUNITIES INNOVATIVE ADVERTISING AND BRAND PARTNERSHIPS



- **Sculptural Ads:**

- Allow brands to sponsor creative sculptures, giant props or installations that align with The Giant's aesthetic.

5. Partnerships with Local and Global Brands

- **Local Focus:**

- Work with Dublin-based businesses to showcase their stories and products through tailored ads or pop-ups.

- **Global Reach:**

- Attract multinational corporations by offering unique opportunities like corporate social responsibility (CSR) partnerships tied to The Giant's community and sustainability efforts.

6. Tech-Powered Advertising

- **AI-Driven Personalisation:**

- Develop an app for visitors that tailors brand messages based preferences and activities at the venue.

- **Interactive Polls and Live Engagement:**

- Integrate real-time polls, competitions, or message displays sponsored by brands, allowing visitors to participate directly via mobile apps.



ADVERTISING REVENUE OPPORTUNITIES INNOVATIVE ADVERTISING AND BRAND PARTNERSHIPS



7. Merchandise Sponsorship

- Offer co-branded merchandise opportunities, such as:
 - T-shirts, hats, and eco-friendly products featuring logos of both The Giant and sponsor brands.

8. Long-Term Brand Collaborations

- **Signature Features:**
 - Allow global brands to fund permanent features, such as a “Google Lounge” or a “Tesla or VW Innovation Center.”
- **Sustainable Branding:**
 - A Partner with eco-conscious brands for sustainability projects, like solar panel installations or green spaces sponsored by IKEA or Patagoni



SUSTAINABLE AND ENGAGING REVENUE STREAMS



By combining digital innovation, immersive experiences, and community-driven campaigns, The Giant can attract diverse advertisers, creating a sustainable and engaging revenue stream while adding value to the visitor experience.

Facility Rentals

- Spaces for private events like weddings, product launches, and corporate retreats.
- Temporary pop-ups for international brands looking to connect with Dublin.

Food and Beverage Partnerships

- Rooftop restaurants or pop-up cafes by renowned chefs. Temporary pop-ups for international brands looking to connect with Dublin.
- Craft beer bars and food trucks at festivals.

Retail and Merchandising

- Exclusive Giant-themed merchandise.
- Collaborate with Irish designers and brands for pop-up stores.



SUSTAINABLE AND ENGAGING REVENUE STREAMS

the
giant

Sustainable Tourism Packages

- Eco-friendly tours tied to The Giant, collaborating with Failte Ireland Temporary pop-ups for international brands looking to connect with Dublin.
- Develop combined tickets for nearby attractions (e.g., The EPIC Museum, Dublin Docklands, Wax Museum Plus).

Memberships and Subscriptions

- Annual passes offering unlimited access to events and exclusive previews.
- Corporate memberships for Dublin-based firms to host recurring events.



COMMUNITY AND EDUCATIONAL ENGAGEMENT

the
giant

1. School Outreach Programs:

- Partner with educational institutions for interactive learning experiences, creative events and STEM days.
- Target all primary and secondary schools for educational school visits featuring informative Giant Info Packs and Activities, etc.

2. Community Days:

- Free entry for locals on specific days to promote inclusivity.

2. Sustainability Initiatives:

- Green festivals with zero-waste policies and environmental workshops.
- Collaborations with Dublin City Council for eco-friendly activations.

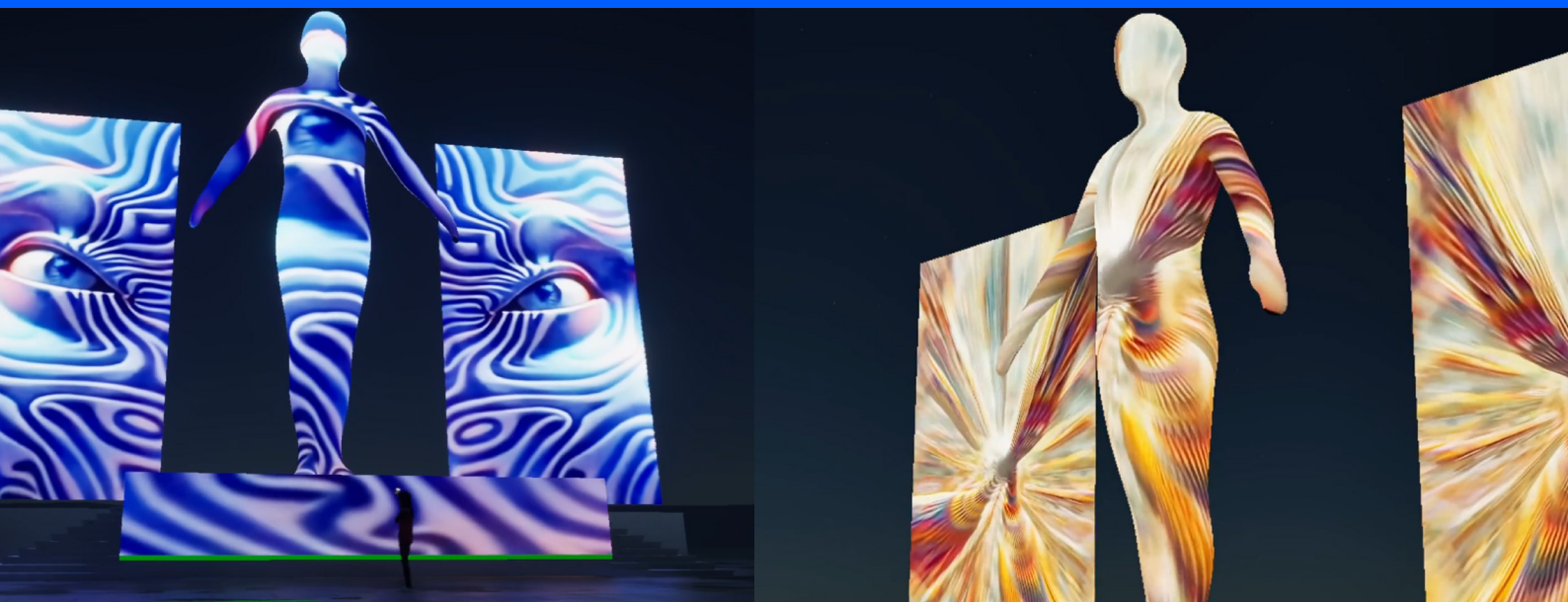




The running order for daily content on The Giant will include Giant Selfies (displayed on The Giant, flanking screens and screen on front of stage), advertisements and diversity of bespoke content created by digital artists and filmmakers. Below is a sample of the content which has been created for The Giant.

Daytime and Nighttime Show

Sixty-minute audiovisual spectacle that features a 30-minute daytime show and a 30-minute nighttime show imaginatively using The Giant and the two-dimensional screens to display a one-of-a-kind experience for all ages. Conceived and directed by award-winning filmmaker Richie Smyth (U2, Netflix, etc.) in collaboration with the acclaimed post-production team at Outer Limits Studio (Dublin), this visually stunning audio-visual production delivers an unforgettable blend of storytelling and cutting-edge visuals.





RUNNING ORDER

the
giant

The Seven Deadly Sins

A groundbreaking 60-minute immersive AI generated show experienced on The Giant and flanking screens. This cutting-edge production seamlessly fuses stunning visuals, storytelling and music with interactive augmented reality (AR) gaming, delivering a thrilling innovative interactive experience.

While the show captivates audiences, viewers elevate their experience by downloading a companion app. Using the app and their smart phones audience members battle AR-generated monsters, ghosts, and villains that materialize above the stage and TheGiant in real time. Victorious players unlock exclusive rewards and achievements, adding an exhilarating competitive edge.

The show features ten six-minute segments, allowing audiences to enjoy it as a 60-minute production or as shorter standalone experiences.

WELCOME TO THE GIANT GAMES!

THE COMPANION 'FIRST PERSON SHOOTER' AR GAMING APP THAT WILL MAKE YOUR VISIT TO THE GIANT EVEN MORE FUN.

Battle **demons and monsters**, and help the giant save your world!

the
giant

thegiantproject.c



Multiple AI generated characters

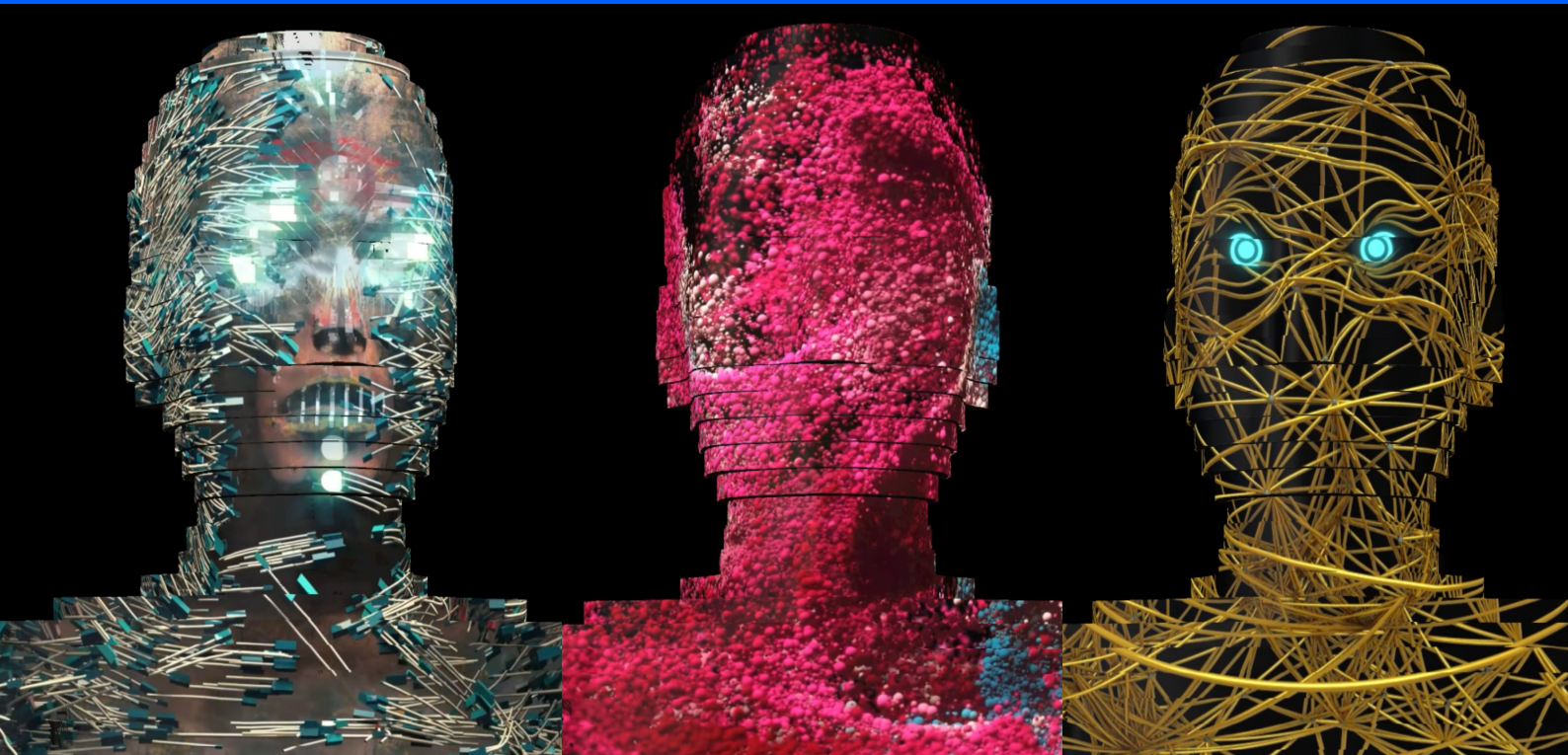
Developed by The Giant's inhouse team of digital artists and computer scientists these AI generated characters are displayed on The Giant with supporting imagery on the side video walls. Characters move, speak and sing reciting iconic lines from their lives, speeches and films. These spectacular biographical portraits include giants such as Mohammad Ali, Marilyn Monroe, Martin Luther King, Barak Obama, Donald Trump, Prince, Aretha Franklin, Abraham Lincoln, George Washington, JFK, Clint Eastwood, Benjamin Franklin, Mike Tyson, Michael Jordan, Nina Simone, Jackie Robinson, Neal Armstrong, Louis Armstrong, Arnold Schwarzenegger, Snoop Dogg, Nicola Tesla, Leonardo da Vinci, etc. In addition to these historical characters and celebrities The Giant's inhouse studio has created numerous custom created fantasy characters, creatures, motion graphics and other digital art works.





Motion Graphic Art Works

Several motion graphic artworks have been created by diverse digital artists that can be inserted into the running order of the day to increase excitement and diversity of content. These spectacular digital artworks custom created for The Giant statue and the flanking screens and accompanying soundtracks will captivate audiences of all ages and backgrounds. These works can also be screened during concerts and DJ evenings enhancing these events.



LIST OF ATTENDEES AND SUPPORTERS OF THE GIANT

Peter Burke - Minister for Enterprise
Brian McGlinchy - Advisor to President Biden & American Consulate to Ireland
Barry Andrews - MEP - Fianna Fail
Ciaran Cuffe - MEP - GREEN PARTY
Frances Fitzgerald - MEP - Fine Gael
Gary Gannon - Social Democrat
John Lahart - Fianna Fail - Dublin South West
Paul McAuliffe - Fianna Fail - Dublin North West
Minister Jim O'Callaghan - Fianna Fail - Dublin Bay South
Senator Mary Fitzpatrick - Fianna Fail
Ivana Bacik - Labour Leader - Dublin Bay South
Dermot Lacey - Labour Party Councillor for the Pembroke - South Dock Ward on Dublin City Council
Claire Byrne - Green Party - Dublin South East Inner City
Danny Byrne - Fine Gael - South east Inner City
Deborah Byrne - Dublin City Councillor - Labour Party - North Inner City: Central Area Committee
Nial Ring - Independent - Former Lord Mayor - Dublin City Councillor
Leo Clancy - CEO Enterprise Ireland
Greg Swift Head of Enterprise - Local Enterprise Office (LEO) - Dublin City Council
Stephen O'Leary - President - Dublin Chamber
Mary Rose Burke - CEO Dublin Chamber of Commerce
Paul Kelly - CEO Fáilte Ireland
Orla Caroll - Fáilte Ireland - Director of Product Development
Alice Manseragh - CEO - Tourism Ireland
Danny McCoy - CEO Irish Business & Employers Confederation (IBEC)
Paul O'Connell - Arts Council - Head of Press and External Communications
Catherine Doyle - MD - Dell Ireland
Lisa Holmes - Dell - Head of Marketing & Events
Eileen Quinlivan - Deputy Chief Executive - Dublin City Council
Pauline Treacy - Corporate Service Transformation - Dublin City Council
Nigel Heneghan - Heneghan Strategic Communications
Michele Connolly - KPMG Partners, Head of Corporate Finance
Karina Howley - Director, CSR Head of Corporate Citizenship
James Chilton - Associate Director, Sustainable Futures - Spatial Planning Specialist & Destination Development - Associate Director at Future Analytics Consulting



COUNTRIES THAT WE ARE IN NEGOTIATIONS WITH AFTER HAVING VISITED THE GIANT EXHIBITION .

- Australia
- England
- Northern Ireland
- Scotland
- Spain
- Italy
- Ukraine
- France
- Bolivia
- USA (Las Vegas, Chicago, Kansas)
- Canada
- Mexico
- Saudi Arabia
- UAE
- Korea
- Hong Kong
- Thailand
- Japan

the
giant

8 Cecilia Street, Temple Bar, Dublin 2
Company No. 544416
enquiries@thegiantcompany.ie
www.thegiantcompany.ie

