FEDERATION OF IRISH SPORT

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commissioned by the Federation of Irish Sport

Economics

An Assessment of the Economic Benefits of Sport in Ireland

The Federation of Irish Sport is the representative organisation for the National Governing Bodies of Sport (NGBs) and Local Sports Partnerships (LSPs) in Ireland. Our membership consists of over 100 NGBs and LSPs from every corner of the country.

Our vision is to provide a dynamic and effective voice for Irish sport, promoting the value of sport to Ireland while providing outstanding representation and services to members. As governing bodies, our members' priorities lie with their sport. Therefore, our job is to communicate their views regarding the benefits of sport in areas such as personal health/wellbeing, the economy and society as a whole.

We are the 'Voice of Irish Sport'

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Foreword

Over the years, the Federation - on behalf of our members, the National Governing Bodies and Local Sports Partnerships that make sport and physical activity happen in Ireland - has been to the forefront of making the case as to why sport is important. Sport matters in so many different ways. Not alone is it a key determinant in the health of our people, but it makes for a more inclusive and diverse society. It enhances the reputation of the country worldwide, while bringing a sense of pride to us all. There is also the very definitive economic impact sport and physical activity has on the country.

Last year was certainly a positive year for sport in Ireland. After a decade in which sport had been calling for a more focused approach from Government to both the financing and the delivery of sport, the Government published its first National Sports Policy which set out a ten-year plan to develop the whole area of sport and physical activity.

It is a plan that has also has come with a commitment to double Government funding over ten years. The first tranche of funding came through last year and recent words from the Taoiseach would indicate that sport will continue to be supported in this year's Budget 2020.

This is the background to the body of research which has come about as the result a partnership between the Federation and the research unit of Investec Bank. We asked Investec to conduct a study which would focus on the economic impact sport has on Ireland. This document "An Assessment of the Economic Benefits of Sport in Ireland" is the result of their work.

Sport Ireland has conducted some excellent research on this area over the years, including its report, *Assessment of Economic Impact of Sport in Ireland* which was carried out in 2010. It was the most comprehensive body of research undertaken in Ireland, and is a document that is still quoted today. We felt that if we could update it now, it could and would potentially provide hard evidence to support the Government's commitment to its investment in sport and physical activity today and into the future.

The good news is that the research does just that with some very interesting findings. For

instance, it suggests that for every euro invested by the Government in sport the return could be as much as €1.95. The Investec Report also looks beyond the economic impact, suggesting that additional investment in the area of sport and physical activity interlinking with health should be looked at if we are ever to solve the long-term health problems of the country. This is an area we hope to commission some research on in the future.

I would like to take this opportunity to thank the Investec team, not alone for their work on this project but also for their continued commitment to Irish sport through their involvement in the very successful 20x20 Women in sport initiative. I would also like to thank our own members whose continuing support enables us to undertake projects such as this. Finally, on behalf of all of our members, I would like to thank our own Chief Executive Mary O'Connor who has been the driving force behind this project.

Roddy Guiney
Chairman, Federation of Irish Sport

A word from our partner Investec

Investec is delighted to partner with the Federation of Irish Sport on this report which assesses the economic impact of sport to this country. Sport confers a variety of benefits on individuals and society, and sports involvement is an integral part of many of our lives, from celebrating our sporting heroes' achievements on the world stage to cheering on our local youth teams in parks across the country, from striving to compete at elite level to engaging in sport simply as a means to improve our personal health.

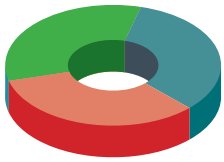
Inevitably the economic contribution of these activities can seem secondary. However sport is an important part of the national economy and contributes significantly in terms of output, employment and spending. The value of sports volunteerism is substantial, as is the contribution that these volunteers make to communities across the country, while sporting tourism is a key component of the overall tourism industry which has expanded to record levels in recent years. As such, understanding the wide-ranging economic impact of sport is critical for policymakers to make informed decisions and we are pleased to be able to contribute to that discussion.

Key Findings

September 2019

Sport's share of the economy

Sport contributes approximately **1.4% of Gross Value Added** in Ireland. It **employs 39,500 individuals** (1.7% of total employment)



Household expenditure

Sport accounts for **2.7% of total personal consumption** expenditures. This equates to average spending of **€30 per household per week** – a similar amount to average household spending on (i) alcohol and tobacco; and (ii) clothing and footwear.

Value of sports volunteering

The economic value of volunteering for sport is approximately **€1.1 billion per annum**. This figure is based on the average industrial wage.

Sports tourism

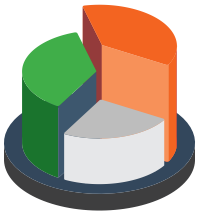
Sports tourism is worth approximately **€500million per year** to Ireland. This figure rises in years where the country hosts major international sports events.

Government funding

State funding of sport has not kept pace with the improvement in the public finances during the economic recovery. Central Government expenditure on Sports and Recreation Services is lower now than in 2009 despite a remarkable **77% increase in tax revenues** in the same period. This is at odds with the beneficial impact of sports investment on the public purse.

Government return

It has previously been estimated that for every **€100 in State investment** in sport in Ireland, the Exchequer receives **€149 back in taxes**. Such a return on investment is clearly very attractive, but recent research by the European Commission suggests that the State may **recoup up to €195** in tax revenue for every €100 invested in sport-related activity. The same European Commission research concluded that an active sport-related economic policy can help counter unemployment.

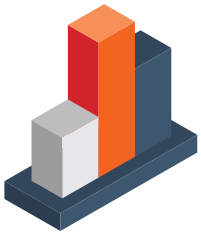


Health cost

Investment in sport can help reduce public health expenditure. Department of Health research states that **62% of the population are overweight or obese.** This is estimated to **cost the State over €1billion annually.** Separate research has estimated that there are **4,000 preventable deaths** in Ireland each year due to physical inactivity.

Qualitative benefits

In addition to the economic benefits, sports participation produces **health, wellbeing and social capital benefits,** both at individual and societal level.



Economic Impact of Sport in Ireland

Using a variety of data sources, we estimate that sport contributes 1.7% of total employment and 1.4% of Gross Value Added in Ireland. We estimate that sport accounts for 2.7% of total personal consumption expenditures in the country. We also estimate that the economic value of sport volunteerism is up to €1.1bn per year and the value of sports tourism to be in the region of €500m annually.

Figure 1 : The contribution of sport to Ireland's economy

	Sport's Share of Total
Consumer Spending	2.7%
Employment	1.7%
GVA	1.4%

Source:
Investec Securities estimates

Employment

To start with employment, we estimate that sport accounts for 39,451 jobs in Ireland. This is in-line with the findings of previous studies (in 2010 Indecon estimated that sports-related employment was 38,225, while in 2012 the European Commission estimated 40,532).

Figure 2 : Employment Overview

Sports Clubs	5,724
Retailers	1,801
Exporters	310
Media	503
Voluntary Sport	7,942
Commercial Activities	17,397
Government (Local & Central)	5,774
Total Emplyment Supported	**39,451**
As a % of Economy-wide Employment	1.7%

Source: Investec Securities estimates based on CSO, Eurostar and Fáilte Ireland data

For context, this is a similar level of employment to that of all primary teaching staff in the country (37,341 in 2018/19 according to the Department of Education and Skills) and close to three-quarters the number of nurses and midwives employed nationally (53,910 according to Census 2016).

Our estimates on employment across sports clubs, voluntary sport, commercial activities (e.g. fitness instructors and groundsmen/ greenkeepers) and sports-related government employment are derived from Census 2016 data and, given wider trends in employment across the economy in subsequent periods, may prove conservative. For the retail sector, our approach is to overlay modified CSO Household Budget Survey (HBS) data on consumer spending on sports-related items (see below) with other CSO data on retail employment.

For the export sector, our employment estimate here is derived from Eurostat data on international trade in sports goods and Fáilte Ireland tourism-related employment statistics.

Finally, we estimate that sport supports 503 jobs in the media sector. While this is lower than previous studies, employment cutbacks across a range of traditional media outlets suggest that such a reduction is warranted.

Consumer spending

Turning to consumer spending, we have modified the findings of the latest CSO Household Budget Survey, both for subsequent trends in consumer pricing and appropriately weighting a number of items (notably, on communications and clothing outlays) to better reflect sports usage. This suggests that the average Irish household spends €30 a week (so €2.7bn a year given the 1.7m households) on sports-related items. To put this in context, the typical Irish household spends a similar amount per week on: (i) alcohol and tobacco; and (ii) clothing and footwear.

Figure 3 : Average weekly household expenditure on sports-related items

Food	€0.42
Clothing & Footwear	€11.49
Household Durable Goods	€0.41
TV/Internet Subscriptions	€1.27
Admission to Spectator Sports	€0.96
Participant Sports (ex. Subscriptions)	€4.03
Subscriptions to Sports & Social Clubs	€5.88
Fees to Leisure Classes	€3.60
Sports-related Equipment	€1.93
Other Items for Games and Sports	€0.02
Total	**€30.01**

Source:
Investec Securities estimates,
CSO HBS

Economic GVA

Elsewhere, preliminary national accounts data released in July suggest that sports accounts for 1.4% of economic gross value added in Ireland. This is in-line with a previous finding by Indecon (2010) but is nonetheless a creditable outturn given the distortions produced by economic developments since then – in other words, excluding multinational effects, sport's relative contribution to the economy would likely be even higher.

Volunteering

We estimate that the economic value of volunteering for sport in Ireland may be as high as €1.1bn per annum.

This estimate is based on Sport Ireland's Irish Sport Monitor 2017, which showed that 10% of people regularly volunteer and that the average time devoted to volunteering was 3.5 hours per week. Although there are challenges in ascribing a specific value to time commitments of individuals, using the average hourly earnings across the economy (€23.07 in 2018) as a proxy suggests an economic value of volunteering for sport of approximately €1.1bn per year.

This estimate is highly sensitive to the value assigned to each hour of volunteering activity. In this regard we note that using the national hourly minimum wage (instead of the average wage), and re-performing the same calculations, implies a total economic value of volunteering of approximately €500m per year. Nevertheless, given the range of activities undertaken and responsibilities assumed by individuals under the wide umbrella of sports volunteerism, we feel that the average wage is a suitable input in this calculation.

Sports Tourism

Another contributor to the economic value of sport in this country is sports tourism, of which there are two principal strands: sports attendance and sports participation.

Looking firstly at sports attendance by overseas visitors, recent research by Teneo Ireland put the economic value of English rugby supporters travelling to this year's Six Nations match in Dublin at €12.4m, or €829 per visitor. This spend per visitor is not dissimilar to that estimated for other sporting events in the country, although we note that the estimated economic impact of the four UEFA Euro 2020 games being staged in Dublin is somewhat lower at c.€300 per visitor which, presumably, is partly attributable to the higher proportion of "day-trippers" given the nature of the event. The economic value of the American College Football Series to be staged in Dublin amounts to €250m over the five-year duration of the series, which suggests a contribution in the region of €1,500 per visitor – a higher per person value given that U.S. tourists typically stay longer and spend more than average while in the country.

Taken together, 2020 looks set to be a bumper year for sports attendance tourism in Ireland with the Euro 2020 matches and the first game in the College Football Series adding approximately €100m of economic value to that created by the country's annual sports events. However, sports participation by tourists is estimated to have an even greater economic impact. In estimating the overall value of sports participation tourism, we note that researchers from the ESRI have previously estimated that 8% of overseas visitors engaged in sports activity while in Ireland. With total expenditure by visitors in Ireland reaching €5.1bn last year (per the CSO), and maintaining this estimated share of sports visitors, we estimate the total spend attributable to sports tourism was €430m last year. In all likelihood, this is a conservative estimate given that Failte Ireland has found that golf tourists in Ireland "typically spend three times more than the average tourist". Indeed, Failte Ireland recently put the economic impact of golf tourism alone at almost €270m annually, with 200,000 overseas visitors playing golf here each year.

All in all, the economic value of sports tourism to Ireland is estimated to be in the region of €500m per year and higher in the years with major international sporting events.

State support and return on investment for the government

The latest data show that, at a headline level, total (central and local) government outlays on Sports and Recreation run to €0.6bn, little changed from the start of the decade.

Figure 4 : Local Government Recreation & Amenity Budget 2018

Agency and Recoupable Services	€6,954,627
Arts programme	€67,280, 302
Community Sport & Recreational Development	€54,151,479
Outdoor Leisure Areas	€126,125,015
Libraries	€161,573,701
Leisure Facilities	€37,818,411
Less: Inter-Authority Contributions	-€2,326,832
Total	**€451,576,703**

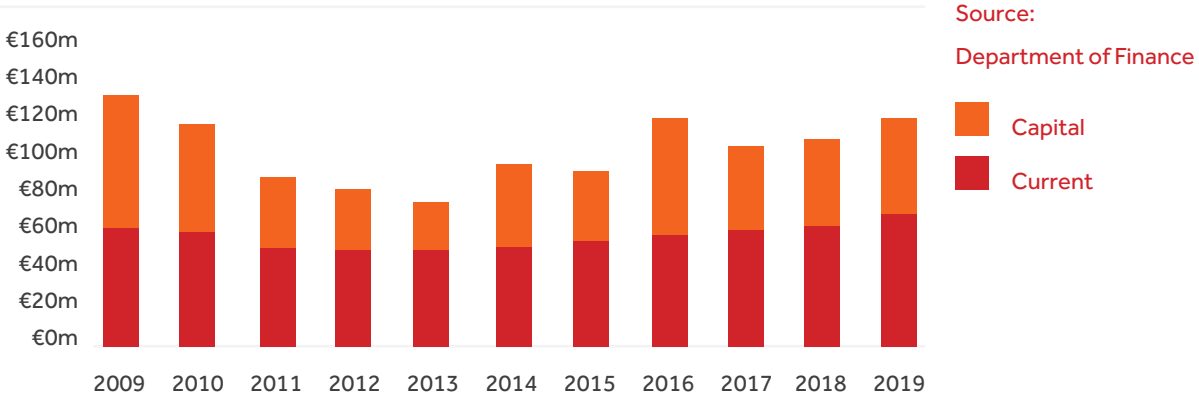
Source:
Department of Housing, Planning and Local Government

Data from the Department of Housing, Planning and Local Government for local authorities' budgeted spend show that the annual spend on Sports and Recreation is €452m, or 78% of total State expenditure on this area. However, within that, only about half pertains to sport, with the balance on areas such as libraries and the arts.

There was good news for sport in Budget 2019, with the State increasing planned expenditure on Sports and Recreation by 13% (current +11%, capital +15%) to €126m.

Among the key highlights of this increase are extra supports for high performance athletes; monies to increase participation in sport; a new Large Scale Sport Infrastructure Fund; and funding for the continued development of the National Sports Campus.

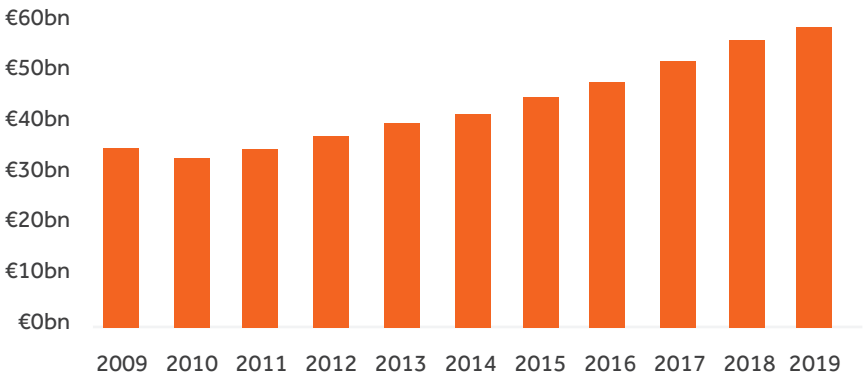
Figure 5 : Central Government Spend on Sports & Recreation by year



Source: Department of Finance

However it is also worth noting that, notwithstanding the increase in Budget 2019, central government expenditure on Sports and Recreation remains lower than in 2009. This is despite a remarkable improvement in the public finances in the intervening decade – total tax revenues last year were 77% higher than in 2009.

Figure 6 : Tax Revenues by year



Source: Department of Finance. NB: Figure for 2019 is as forecast by the DoF.

What return does the State get for such outlays?

Firstly, as we have detailed elsewhere in this report, sport makes an important contribution to the economic life of this country, supporting nearly 40,000 jobs and providing economic value of up to €1.1bn per year through volunteerism.

It has previously been estimated (Indecon, 2010) that for every €100 of State investment in sport, the Exchequer receives €149 back through taxes on sport-supported expenditures and incomes. Such a return on investment is clearly very attractive, but we wonder if the Government's return might be even higher based on more recent research.

The European Commission published a detailed pan-European study in April 2018, *Study on the Economic Impact of Sport through Sport Satellite Accounts*, which drew on an extensive EU-wide dataset and assessed the macroeconomic significance of sport in the EU. This report states that, on an EU-wide basis, "the average multiplier of sport-related goods and services equal 1.95". In other words, every €1 outlay on sport generates €1.95 in economic activity.

Taking this one step further, the Department of Finance forecasts that accompanied Budget 2019 suggested a correlation of 0.99 between growth in nominal GDP and tax revenues (i.e. tax revenues increase on an almost one-for-one basis with increases in economic activity). Bringing these calculations together implies that a return of €1.95 could accrue to the Exchequer for each additional €1 spent on sport – a significantly higher return than previously thought, although we are mindful that the multiplier of 1.95 is an EU-wide estimate rather than specific to the Irish context.

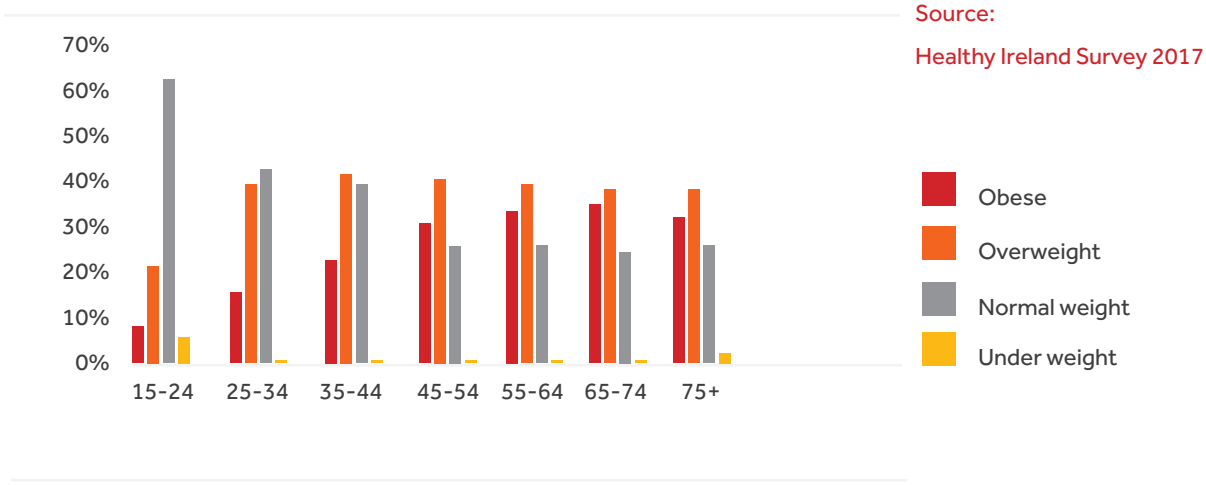
Also detailed in the European Commission study is the fact that sport is an employment-intensive good – increasing sport-related GDP by 1% increases employment by more than 1.35%. As concluded in the Commission's report, an active sport-related economic policy can be an effective way to counter unemployment. This should be particularly relevant for Ireland given both our recent experience with unemployment and the fact that sport's share of total employment in this country lags behind a number of our European peers – we note that the Commission found that sport's share of employment in the UK is 3.75%.

Benefits also accrue on the expenditure side through lowering health spending

In addition to the revenue side of the public accounts, increased investment in sports could deliver helpful benefits in terms of reducing public health expenditure.

Research commissioned by the Department of Health in 2017, *Healthy Ireland Survey*, showed that 62% of the population were overweight or obese while a detailed (2012) study by Safefood, *The Cost of Overweight and Obesity on the Island of Ireland*, estimated that in 2009 obesity was costing the Irish economy €1.13bn per year, of which 35% was through direct healthcare costs. The main components of direct costs were found to be hospital care and drugs and, as noted in the report, the main drivers of these cost items were "cardiovascular disease, type 2 diabetes, colon cancer, stroke and gallbladder disease".

Figure 6 : Weight Category by Age



Source:
Healthy Ireland Survey 2017

On this topic, the Wealth Health Organisation (WHO) has identified physical inactivity as the fourth leading risk factor for global mortality. People who are insufficiently active have a 20% to 30% increased risk of death compared to people who are sufficiently active. Globally, physical inactivity is believed to be responsible for 6% of the burden of coronary heart disease, 7% of type 2 diabetes, 10% of breast cancer and 10% of colon cancer and, alarmingly, the statistics are worse for all of these diseases in Ireland's case.

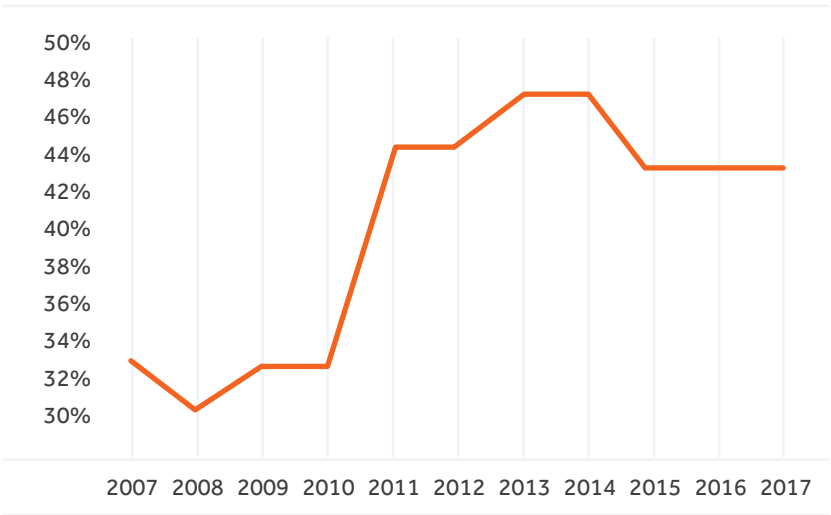
Although there is a distinction between physical inactivity and obesity, international research by the WHO suggests that physical inactivity has a health budget cost for this country of up to €1.5bn per year, a cost not dissimilar to that estimated by Safefood arising from obesity in Ireland. This point has been acknowledged by the Minister for Sport and is an integral part of the Government's National Sports Policy 2018-2027. In this regard, we would note that, given the growth (and ageing) of the national population since these estimates were made, the costs are very likely to have increased in the interim.

Furthermore, and to look at the topic in a slightly different way, research published in The Lancet medical journal in 2012 estimated that physical inactivity was responsible for 14.2% of all-cause mortality in Ireland which, based on cause of death statistics, translates into approximately 4,000 preventable deaths each year due to physical inactivity.

As such, while we somewhat lack detailed data on health costs in Ireland, the case for further state investment in sport appears clear if we are to be serious about tackling one of the most serious health issues in the country. Indeed, as noted by the authors of the Safefood report, the data highlights our collective "failure at societal level to promote high levels of physical activity". To this end, it is worth reiterating that central government spending on Sports and Recreation Services is lower now than in 2009, a year close to the economic trough, although we note the ambition stated in the Government's National Sports Policy 2018-2027 to effectively double annual State investment in sport over the lifetime of the policy.

Looking a little further into the future, it is clear that old age-related health costs are set to increase significantly in the coming years. Projections from the CSO show that the number of people aged 65 or over is expected to increase from 630,000 in 2016 to 1 million in 2031 and to 1.5 – 1.6 million in 2051 (a 150% increase). The older dependency ratio is expected to increase from 20% in 2016 to 40-48% in 2051. The changes on society will be profound and the impact on State health spending will be substantial, albeit difficult to quantify at this stage. However, by way of illustration, we note that there are approximately 23,000 older people currently in long-term residential care funded by the NHSS ("Fair Deal" scheme) and the budgeted cost for the scheme this year is €976m, or 1.7% of total tax revenue. The potential additional burden on just this one area of expenditure from the projected increase in our older population is clearly significant, and it is therefore vitally important to consider all ways, including sports investment, to encourage active and healthy lifestyles amongst our population.

Figure 7 : Sports Participation



Source:
Irish Sports Monitor 2017

Qualitative benefits of sport

Although much of this report focuses on the economic impact of sport in Ireland that can be quantified or reliably estimated, looking solely through this narrow lens would fail to appreciate the full value of sport in this country and the broader range of positive outcomes that sport can deliver. In particular, involvement in sport confers a variety of benefits on individuals and society, ranging from improvements in the health of participants, enhancing perceptions of personal well-being, increasing educational attainment and a broad range of social benefits including fostering social capital, encouraging local community engagement and reducing anti-social behaviour and crime.

By their nature, it is difficult to quantify the value of such benefits and even untangle one benefit from another. However, there is a growing body of research and evidence that demonstrates these positive impacts and, even if much of this research has been conducted outside of Ireland, it is reasonable to assume that the principles apply to this country.

Wellbeing

Sport has an important role in promoting self-perceived personal wellbeing. Survey data has shown that people who are regularly active are happier, more satisfied with their lives, report higher levels of self-efficacy, and are less likely to experience anxiety than those who are inactive[1]. However such benefits arise not only through direct sports participation, but also through association with sports clubs and volunteering activities. Volunteering contributes important functions for society and communities through the provision of services on a cost-free basis, which would otherwise require funding or would not be provided, and can increase the sense of belonging in a community, increase social trust and have positive effects on individuals' mental health[2]. In Ireland, data has shown that more than 10% of people volunteer for sports activities on a regular basis.

Social Capital

A number of studies have shown a positive effect of sports on social capital. Much of the evidence in this area indicates that involvement in sport contributes to social capital through encouraging social interaction and the development of social

connections and networks, which have positive effects at both the individual and society level. As such, there is a degree of overlap between the benefits associated with social capital and volunteerism highlighted above. This point is particularly relevant in an Irish context where sports clubs and bodies are often a key pillar in rural communities and provide an essential source of social community engagement, particularly in areas that are facing the challenges of rural decline. Indeed, more people are members of sports clubs than any other form of voluntary or community organisation in Ireland.

In addition, there is evidence that points to sports participation having a positive association with lower anti-social behaviour[3], with this effect mainly achieved indirectly through the reduction of risk factors for such behaviour in young people. Also, as discussed earlier in this report, the European Commission has found that as sport is a relatively employment-intensive good, an active sport-related economic policy can be an effective way to counter unemployment.

Health

Aside from the benefits to the public finances that accrue through lower health spending, it is important to highlight the personal health benefits that arise through sports activities. A large volume of scientific research has demonstrated a positive relationship between sports participation and health outcomes, and the role of sport in increasing physical fitness, and consequently reducing risk factors for many long-term diseases. There is also a body of evidence that shows that physical activity has a positive impact on mental health and can lower the risk of depression, suicide, dementia and cognitive decline in older adults. Studies have shown that regular exercise can reduce the risk of dementia by approximately 30% and Alzheimer's disease by approximately 45%[4].

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1. Sport England, Active Lives Adult Survey. 2017.

2. CSO. QNHS Volunteering and Wellbeing. Q3 2013.

3. The Culture and Sport Evidence Programme. A review of the Social Impacts of Culture and Sport. 2015.

4. Alzheimer's Society. https://www.alzheimers.org.uk/about-dementia/risk-factors-and-prevention/physical-exercise

Women in Sport

While the data continues to point to a gender gap in sports participation, this has narrowed in recent years. Significant differences remain however, in areas such as coverage and opportunities to become involved on the administration side of sport.

Participation

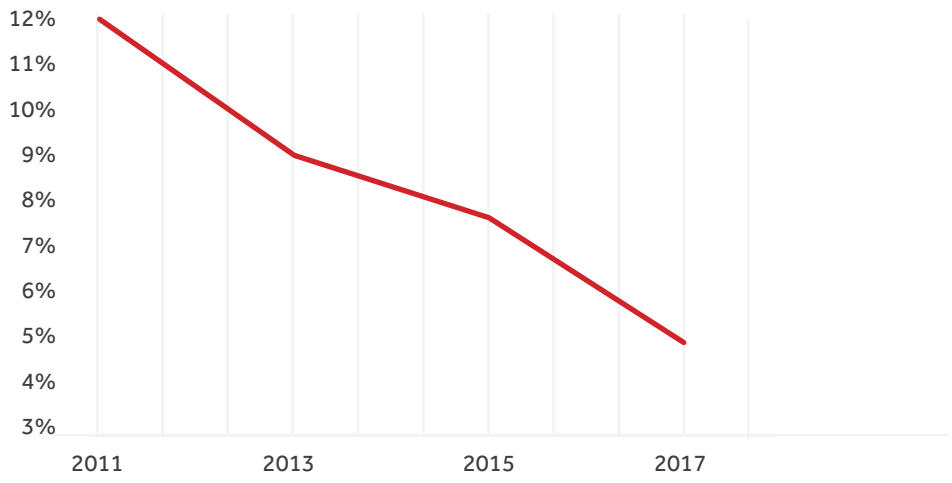
The evidence in terms of participation is very positive. A special module on Sports and Physical Exercise by the CSO reveals that in Q2 2013 there was little difference in participation levels for males (73.2%) and females (71.8%) aged 15 years and over. The same survey reveals that membership of at least one sports or fitness club stood at 62.6% for males and 58.9% for females.

Interestingly, the CSO data shows that females are more likely to be self-starters, with 70.5% of those participating in sport and/or other physical activity disclosing that they do so on their own initiative, compared to 65.1% of males.

Another distinction is that a much higher share of females who exercise (87.1%, versus 78.4% for males) do so in order to improve physical health and fitness. These findings are interesting when considered against the backdrop of research that shows the gender gap in terms of sports participation has fallen by more than half (in favour of females) since 2011, although there is clearly further progress to be made.

Figure 8 : Sport participation gender gap

Source:
Irish Sports Monitor



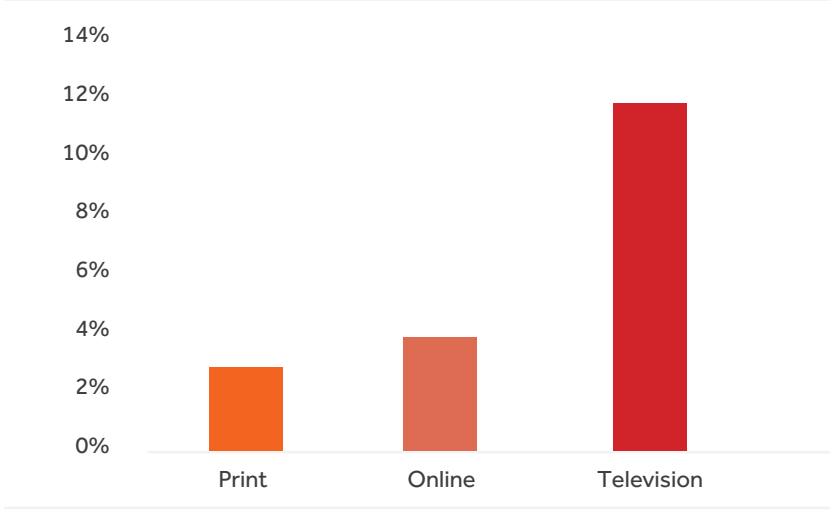
NB: The difference in percentage points of male and female sports participation.

Media coverage

Nielsen Sports research commissioned in 2018 by the 20x20 campaign revealed that 57% of Irish people wanted to see equal visibility in the media for female and male sporting role models. An even larger share (63%) of people said that they would like to see Ireland's sportswomen become national heroes in the same way as our sportsmen. Despite this positivity, the coverage afforded to women's sport during the monitoring period in Q3 2018 was very low – a 3% share of print, 4% share of online and c.12% share of television. The 20x20 campaign's tagline, "If she can't see it, she can't be it", comes to mind here.

Figure 9 : Female sport's share of sports coverage in the media

Source: Nielson Sports



Sports administration

Apart from media coverage, another striking imbalance where women's sport is concerned is the extent of opportunities for females to be involved in the management and administration of sport compared to males. A survey by Ipsos MRBI for the 2017 Irish Sports Monitor revealed that 68% of those surveyed felt that females were given fewer opportunities to participate in sports administration than males – a troubling finding. In this regard, we note that one of the KPIs of the government's National Sports Policy 2018-2027 is to increase female participation on Boards of funded sports bodies to at least 30%.

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