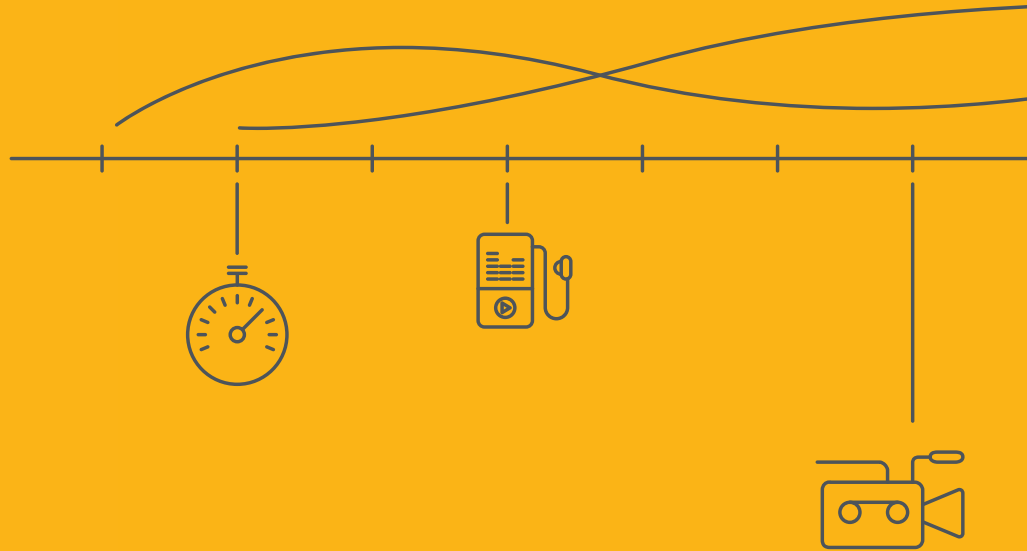


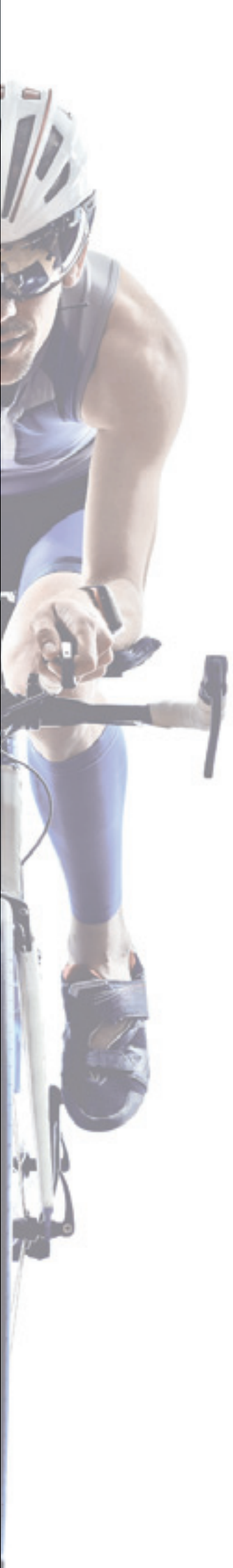


THE PHILIP LEE SPORT REPORT



PHILIP LEE





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INTRODUCTION



Philip Lee
Managing Partner

Sport is important. Sport evokes strong views on so many aspects, from performances, to players and managers. The passion that is sport is unique. Whether it is a mother watching her daughter compete or the country watching the national team, or the para Olympian crossing the line – passions run high.

2.8 million adults in Ireland are interested in sport and exercise. Sport is family, community, and country, but also sport is business.

This report we have commissioned estimates that the total Irish spend on sport is in excess of €2.4 billion. We are spending nearly €450 million on sports clothing, and equipment, and €250 million on sports club membership. Corporate sponsorship is estimated at €100 million but is certain to climb and climb fast.

Data from the Higher Education Authority shows an estimated 2,000 people studying sport at third level in 2013. Sport is hugely important because of the number of people employed in sport whether it is building and maintaining and running gyms, managing sports events or training participants, it is becoming an ever increasing source of employment.

Whether you are a parent, a coach, a student or a club member, the work of helping the next generation of players and athletes has never been more important.

From the perspective of health and well-being, the increasing activity levels associated with the participation in sport are welcomed. Never before has there been so much interest in health, fitness and wellbeing among the Irish general public. Sport and exercise plays a crucial part in keeping the nation healthy. That role will only become more important in the future. It is however, accompanied by a rising crisis with obesity.

We have commissioned this report because we consider that sport is vital to our communities and business.

The Philip Lee Sport Report provides a snapshot of sport in Ireland at a critical juncture in its development. The firm commissioned Amárach Research to conduct a nationwide survey of Irish adults about their involvement in sport and other activities. Amárach also conducted a series of interviews with key commentators on the Irish sport scene.



The report is in four parts:

Part one looks at levels of interest and participation in sport, including a special briefing on children and sport.

Part two examines sport-related commitments and spending, from gym membership to club membership and gives unique insights into the economic impact of sport, including a special briefing on fundraising.

Part three explores the changing landscape of sport sponsorship and advertising, including the brands who are gaining most from their investments, as well as a special briefing on professionalism in the GAA.

Part four turns to the role of government in promoting, supporting and participating in the exciting future ahead for Irish sport.

We are advisors to many bodies involved in sport and to many public and private entities in the health sector. If society recognises the incredible value of sport to our health, to social inclusiveness, to addressing the needs of children who may take a wrong direction in their life, then we must also care about the funding and the business of sport. Corporate sponsorship together with government assistance are vital for increased participation and higher standards.

We spend over €13 billion on health and under €50 million on sport. Would our society be significantly different if the government funded sport to the tune of not €50 million, but €1 billion a year?

I have had the good fortune to travel through most countries in Europe and I am continually amazed by the level of sports facilities in countries with substantially smaller GNP's than Ireland. The funding of sport whether it's through government, sponsorship, levies on gaming, or media rights raise important issues. Ensuring our athletes are successful internationally requires substantial investment in both facilities and in the athletes. These things are also important to a nation. The regulations of sport to ensure that it is fair, free of drugs, free of racism or gender bias are also fundamental. Such issues are important to sponsors. Finance and business will play a key role in these issues.

My partners and I hope that you enjoy the findings and that it stimulates debate. I would personally like to thank those who contributed to the report namely, Niall Quinn, Pat Gilroy, John Treacy and Ger Gilroy. Their tremendous insight adds a dimension that brings the findings to life.

Philip Lee



① FANS AND PLAYERS



1. FANS AND PLAYERS

The Irish love sport. In fact, our survey shows that 84% of adults are interested in sport and exercise: that's 2.8 million people. Interest varies by gender and age, but not that much: 'only' 80% of women are interested in sport and exercise, while up to 87% of 16-24 year olds are interested.

/// 2.8 million adults are interested in sport & exercise

Of course, 'interest' takes many forms. For some it involves watching their favourite teams on television, for others it is about cycling with their friends at the weekend. Some even do both. Our survey reveals big differences when it comes to viewing sport on TV. Nearly two in five (38%) men watch sport on TV at least 4 or more times a week. Just 10% of women do the same. Those aged 45-54 watch sport on TV most often, while those 16-24 watch it least often. Probably because they're too busy participating in sport.

We asked people who watch sport on TV (over 3 in 4 adults) how much time they spend watching live sport on TV in a typical week. As the chart reveals, the amount of time (in minutes

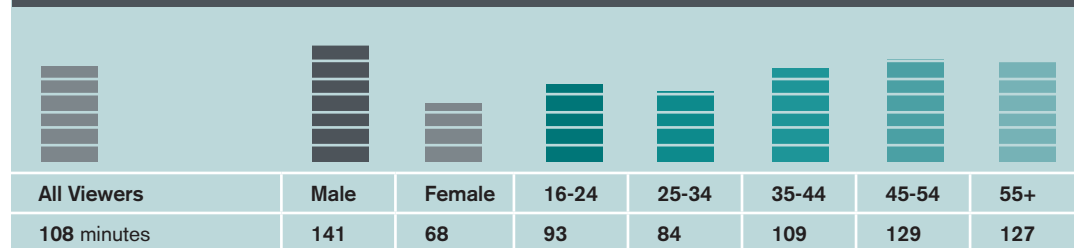
/// The average viewer watches 108 minutes of live sport on TV every week

However, we are not in danger of becoming a nation of couch potatoes let alone 'fair weather' fans. The vast majority of those interested in sport and exercise do also attend professional and amateur sporting events (that's 2.3 million adults). Admittedly attendance is (a lot) less regular than viewing sport on TV – though four in ten do attend a sporting event at least once a month or more often.

/// 2.3 million adults attend sporting events in Ireland

This represents a significant investment of time and money (we return to the latter in the next section), and it certainly demonstrates a high level of commitment and support beyond the merely passive consumption of TV broadcasts. Nevertheless, there are again many differences across various population groups: men are twice as likely as women to attend sporting events, while 25-54 years olds are more likely to attend than others.

Average minutes per week watching live sport on tv



Base: all adults interested in sport or exercise/watch live sport on TV

per week) is quite high for some groups: Men watch twice as much live sport as women, while over 45s watch considerably more than under 35s. Other findings show that those in higher income groups watch slightly more live sport than lower income groups. While those who are unemployed watch only 15 minutes more live sport on TV than those who are employed in a typical week.

Occasionally a 'one off' sports event will capture the popular imagination. For example, the opening stages of the Giro D'Italia cycle race were held in Ireland earlier in the year. A third of those interested in sport and exercise watched the coverage – and 7% went to see a nearby stage of the race: that's over 200,000 adults.

/// Over 200,000 adults went to see a stage of the Giro D'Italia in Ireland

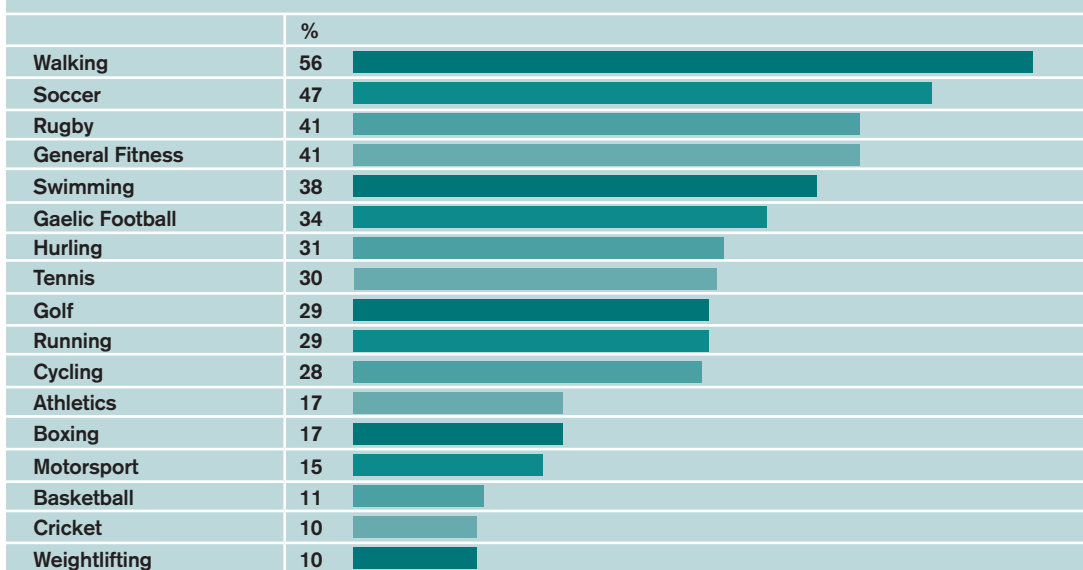
Given such high levels of interest in sport – whether viewing on TV or at events themselves – what sports and activities are people most interested in? Answers vary depending on whether 'interest' is defined as a sport or activity you participate in yourself, or whether it is simply one you follow as a fan and a viewer. We can see this in the answers from our survey (full list in Appendix 2):

This becomes clearer when we look directly at participation in sport. Some 2.6 million adults take part in any exercise (other than team sports) such as going to the gym, running, cycling etc. The majority do so two or more times per week (and there are surprisingly few significant differences by gender, age or income group). This probably is due to the fact that activities such as walking, keep fit and swimming are 'age friendly' in that they remain accessible to participation into old age.

/// 2.6 million adults participate in sports or other physical activities in Ireland

While we noted earlier the significant amount of time viewing live sport on TV, it is reassuring (from a health benefits perspective) to see that even more time is dedicated to actual participation in sport and exercise.

Interest in specific sports and activities in Ireland

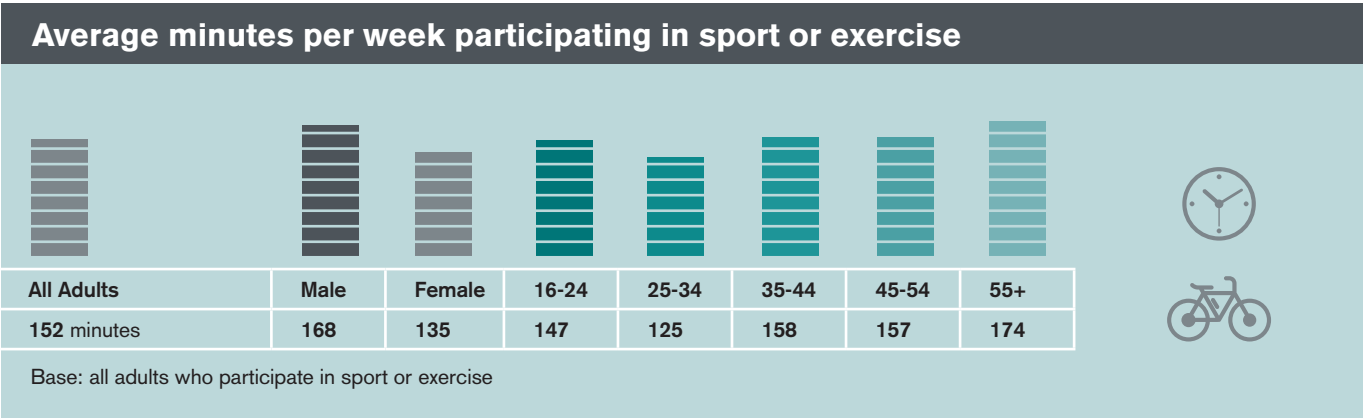


Base: all adults interested in sport or exercise

We see from the chart a fusion of sports or activities people tend to watch (especially as they grow older), and those they tend to participate in (also as they grow older!). So activities such as walking, fitness and even swimming are driven mainly by participative interests, while soccer rugby and GAA are driven more by viewing interests.

Indeed, the average active adult spends two and half hours a week in physical activities such as walking etc.

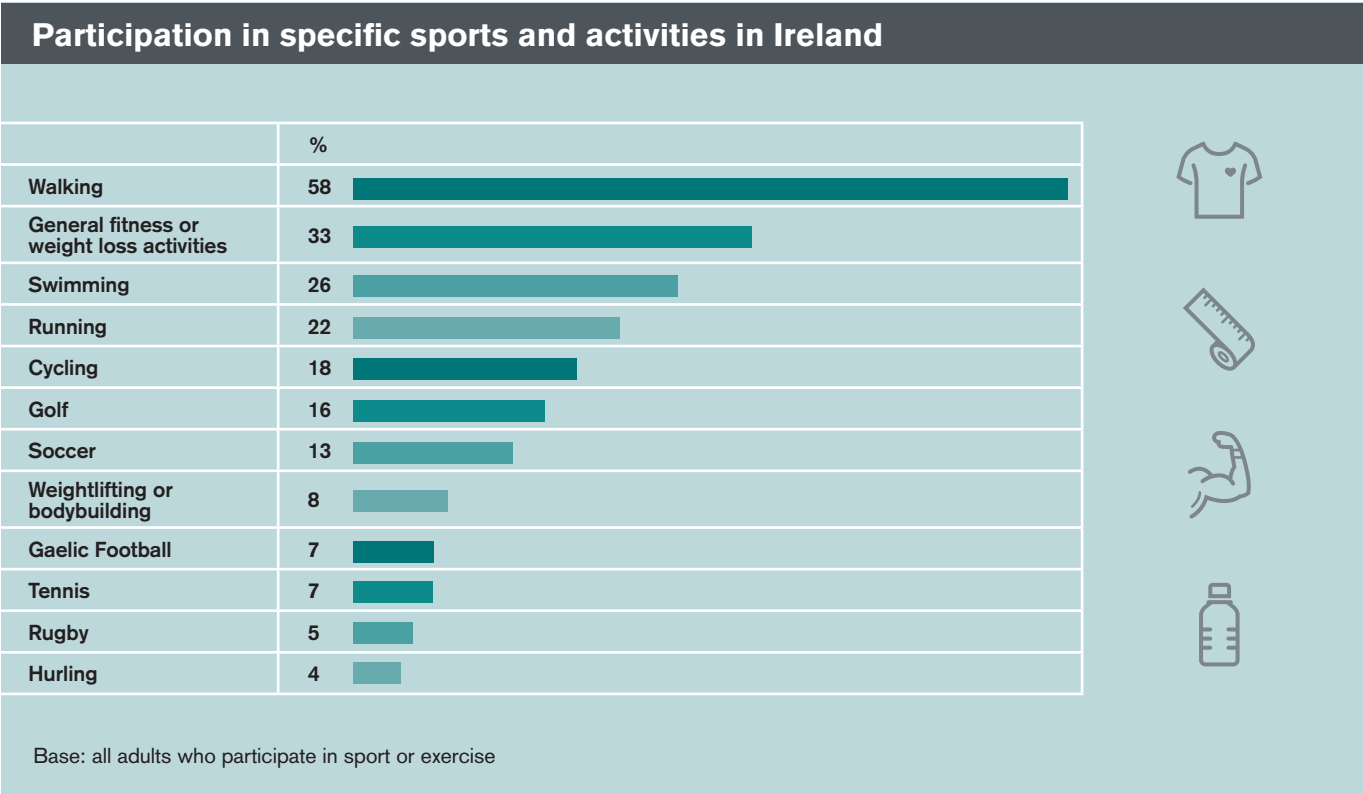
Though as the chart shows, men spend more time than women on sport and exercise, while older people actually spend more time than younger people.



/// The average active adult in Ireland spends two and a half hours a week exercising

Curiously, people living in Leinster (outside Dublin in our survey) are the most active from a regional perspective, clocking up 166 minutes per week vs just 115 minutes per week for those living in Connacht/Ulster. Unemployed people spend an average of 12 minutes a week more doing exercise than employed people.

As for what people are doing during this time, we can see in the next chart that walking, fitness, swimming and running are the most popular activities (full list in Appendix 2):



Who are these people? Below, we provide thumbnail sketches of participants in several of the main sports:

Walking: 1.5 million adults

Participants are predominantly female, with the highest level of participation among over 65s. Walking is more popular in Munster (62%) than in other regions. A quarter of all walkers do so seven days a week – the highest frequency for any sport or activity.

Swimming: 0.7 million adults

Participants are also predominantly female, with the highest level of participation among 35-44 year olds (32%). Parents with children under 18 are more likely to swim (33%). The majority of swimmers swim once a week or more often.

Running: 0.6 million adults

Females make up the majority of participants, while the highest level of participation is among 16-25 year olds (36%). Dubliners are the keenest on running (26% of all active adults). The majority of runners run twice a week or more often.

Cycling: 0.5 million adults

Participants are slightly more female than male, with the highest level of participation among 45-54s year olds (22%). Dubliners are again the keenest on cycling (21% of all active adults). Nearly half of cyclists cycle twice a week or more often.

Golf: 0.4 million adults

Participants are overwhelmingly male (25% vs 5%), with the highest level of participation among over 45s (24%). Those in higher socio-economic groups are more likely to participate than those in lower groups (19% vs 12%). The majority of golfers do so once a week or more often.

Soccer: 0.3 million adults

Participants are again overwhelmingly male (22% vs 4%), with the highest level of participation among 35-44s (19%). Dubliners are the keenest players (16% of all active adults). The majority play soccer once a week or more often.

Gaelic Football: 0.2 million adults

As with soccer, the majority of players are male, with the highest level of participation among under 25s (15%). Frequency of playing is similar to soccer. Active adults living in Connacht/Ulster are more likely to participate in Gaelic football than any other region (10%).

Overall, such high levels of active participation involve considerable commitments of money as well as time. In the next section, we look at the financial investment Irish people make in sport – from gym membership to equipment to fundraising.

SPORT BRIEFING: CHILDREN AND SPORT



There is a growing realisation of the importance of sport and exercise for our children, especially as the incidence of obesity increases. We asked all adults in our survey (whether interested in sport or not) if they thought children were more or less involved in exercise nowadays than adults were when they were young? The answer couldn't be clearer:

Just over one in four (28%) think children are doing more exercise nowadays than when they were children. However, over six in ten (62%) think children are doing less exercise nowadays compared to the past.

That said, parents with children under 18 are slightly less negative: 35% think their children are doing more exercise, but 53% think they are doing less exercise than when they – the parents – were children themselves.

Why is this? Those who think children are doing less point to a large number of explanations, with entertainment technology rather than the schools or teachers themselves getting most of the blame:

Reasons children are less involved in exercise nowadays %	
Impact of video games	84
Impact of other digital devices	77
Impact of television	71
Being dropped to school in the morning	62
Children aren't allowed out as much to play	49
Not being allowed to run in playgrounds	45
Not enough is being done to promote sport among young people	30
Not enough green areas	22
Too much school work	21

Base: all adults who participate in sport or exercise



Ger Gilroy

Sports Editor, NewsTalk



As the country emerges from recession, the Government has a unique opportunity to leverage sports policy to deliver real and substantial benefits in terms of health and education in Ireland. But it needs an overarching vision of the future role and contribution of sport – from services to town planning to funding – that will justify serious investment. The key thing is to realise that for every euro spent by the Government on sport there is a return of five or more euro in additional activities, cost savings and more besides.

We need to take a long term view: many of the changes and benefits from a sustained focus on sport will only emerge after a decade or more of investment in everything from sport in schools to helping pensioners become more active. Sport policy has to be about more than elite track and field sports, it needs to engage everyone in the benefits of sport. For example, many Irish people have become enthusiastic runners in recent years – but a lot of them are doing it wrong and would have benefited from proper coaching at school!

More PE teachers in our schools would also help, to provide a focus on fitness, health and nutrition to counteract the worrying trend in childhood obesity. We can learn from other countries such as the United States where high school sport has been instrumental in keeping kids in school for longer, reducing dropout rates and helping tackle problems of poverty and inequality that inevitably follow an incomplete education.

On the issue of professional sports in Ireland, we have to come to terms with the limits of operating in a small country with small audiences and fan bases. There is a natural ceiling to the revenues that can be generated by TV rights, for example, especially for sports mainly of interest

to a domestic audience. However, some of these limits can be overcome with a partnership approach such as that adopted for Rugby Pro 12, where a joint deal is possible with the likes of Scotland and Wales. The big money in sport goes to the big markets that get the big players, so we need to be smart about how we use the resources and networks at our disposal.

We may need different types of sports organisations in the future to respond to these and other developments. Sponsorship of sport by alcohol companies is only going to go one way, creating pressures for many organisations. Some teams and managers – like Jim McGuinness in Donegal – have been clever about using the Diaspora and other untapped sources of financial support. There is undoubtedly a lot of wealth (private and corporate) that others can tap as well.

Some sports will find it easier than others. Irish soccer is in a bad place right now, and might need to develop a 'Celtic League' style initiative (combining teams from Scotland and Wales) if it is going to attract the right levels of support and funding. Nevertheless, there are a lot of good things happening in Irish sport, driven by partnerships and grass roots activities. For example, the Federation of Irish Sports is doing a great job helping coordinate and concentrate activities. But we still need a guiding vision for sport that will build on the good works of others and promote sport as a national priority.

MEDIA AND SPORT



Commentary by
Jonathan Kelly
Partner, Philip Lee

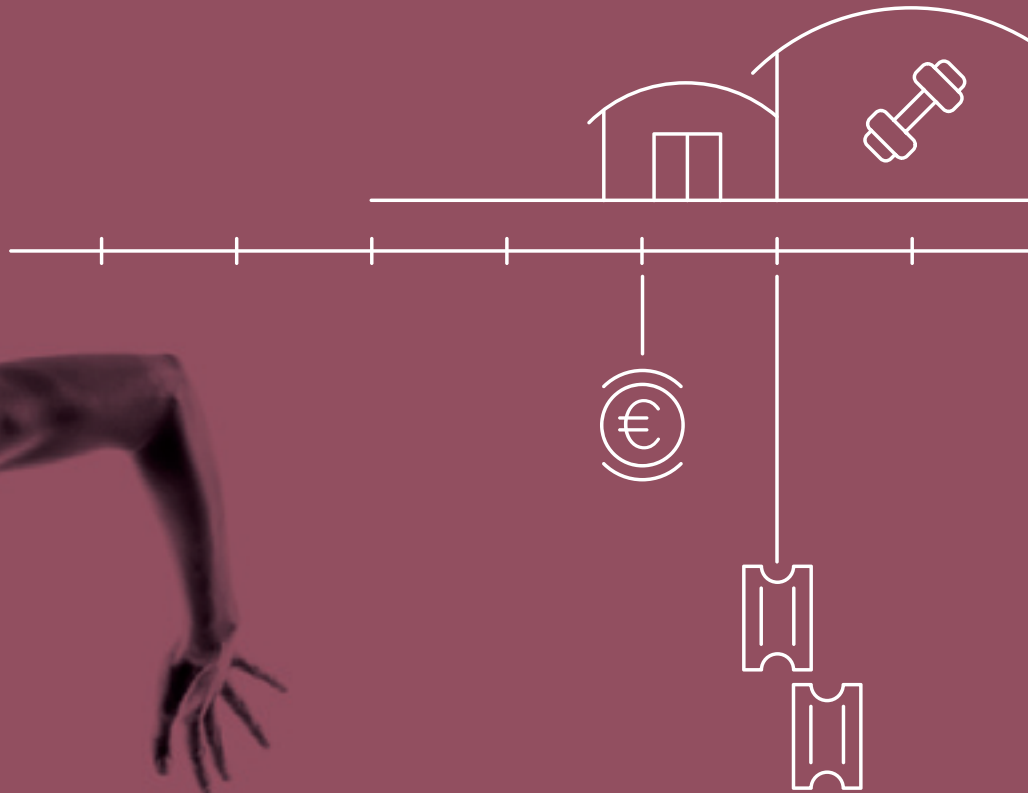
Media and sport are interdependent. Major sports events drive substantial advertising revenue to the media. At the same time the award of exclusive TV rights provides substantial revenues to sporting organisations. This relationship is particularly important in the major field sports such as GAA, soccer and rugby. It is less evident in minority sports.

While the grant of exclusive rights to TV broadcasters can generate substantial income, the award of media rights to pay television channels affects substantial proportions of society who would wish to view those events on free to air services. For this reason in 1997 the EU Commission adopted an amendment to the Television Without Frontiers directive obliging member states to take measures to ensure that broadcasters in its jurisdiction do not broadcast on an exclusive basis events which are regarded by that member state as being of major importance for society in such a way as to deprive a substantial proportion of the public of the possibility of following such events on free television. There is clearly a need for balance in the operation of these provisions. The recent agreement between the GAA and Sky TV highlights the issues. It is not easy to achieve this balance because on the one hand every additional euro that goes into the sport as a result of the grant of exclusivity benefits the sport. On the other hand this exclusivity creates hurdles for members of the public who wish to view the sport about which they are passionate.

Another balancing act must also be performed by the national broadcaster. Under the Public Service Broadcasting Charter, RTE has committed to providing sports programmes that reflect the demands for national, regional, minority and local sports in Ireland. This is reinforced by the Broadcasting Act 2009 which obliges RTE to ensure that the programme schedules provide coverage of sporting activities and cater for the expectations of the community generally. In regulating the media to achieve the common good how far should regulation mandate a switch from screening the most popular sports to show minority sports instead? Minority sports are of substantial benefit to society. They will always struggle in terms of funding. Nevertheless they may have substantial numbers of participants or may cater for physical or intellectual skills that are different to the main field sports. These are issues with which the business community can also engage by way of sponsorship or patronage to the mutual benefit of both of the business and the sport.

We hope that the analysis contained in this report will stimulate thought and encourage further participation by business in sponsorship of both individuals and national governing bodies.

② MONEY AND MEMBERSHIP



2. MONEY AND MEMBERSHIP

Sport is big business in Ireland; and 'small' business too. In other words, beyond headlines about sponsorship deals, transfer fees etc, millions of fans, supporters and participants spend millions of euro to drive the economy of sport in Ireland.

Membership

Take the gym business – most of us have belonged to a gym at some stage, and many have dropped out. Gym membership is a significant investment of time and money, so joining and not using a gym is an expensive option. Our survey reveals that a third of those active in sport or other physical activities are members of a gym – that's nearly 850,000 adults. But our survey also shows that half of those who are not members used to be members – that's over 900,000 adults.

/// Nearly 850,000 adults are members of a gym, but over 900,000 used to be members

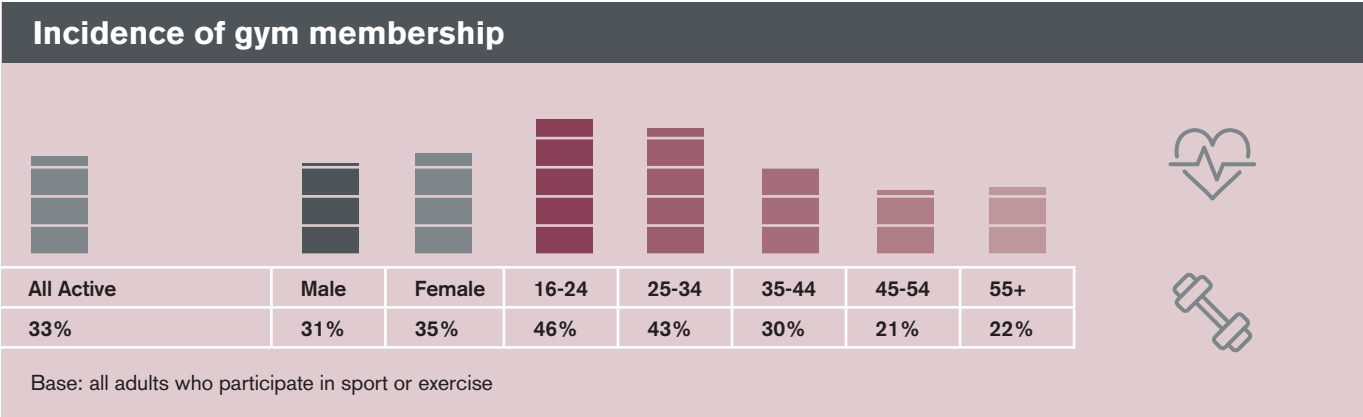
Gym members tend to be slightly more female than male and predominantly under the age of 35. Those in employment are more than twice as likely to be members of a gym than those who are unemployed:

Those who were previously members, but are no longer in a gym, cite a range of reasons for their departure. The number one reason is simple affordability: 64% of 'lapsed' members say they had to make cut backs and gym membership was one of them. For others it was the environment in the gym that turned them off membership (for 17%), followed closely by the fact that they just never went to the gym, so didn't get good value for money (16%).

/// 64% of 'lapsed' gym members say they could no longer afford membership

Nevertheless, despite large numbers of 'lapsed' gym members, those who do use gyms tend to do so quite frequently. As the chart shows, one in five uses the gym 4 or more times a week, and only a minority use it less than weekly. Men tend to use the gym more frequently than women (despite comprising a minority of members).

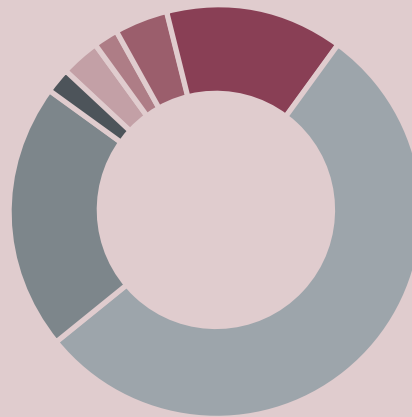
A key motivation for such dedication may well be the cost of membership. About half of gym users pay their membership fee annually, and a third pay every month. Only 13% of gym members in our survey pay on a weekly or 'pay as you go' basis.



Frequency of going to the gym

	%
7 days a week	2
4-6 times a week	19
2-3 times a week	53
Once a week	14
A few times a month	4
Once a month	2
Less than once a month	3

Base: all gym members



How much does it all cost? For those who pay annually, the cost is €330 each. People who pay monthly typically spend €45 per month. Weekly visitors pay €50 per week, while 'pay as you go' visitors pay €65 per visit. If we add up the typical spend of gym goers on membership then the total annual expenditure is some €435 million.

/// Gym members spend a combined €435 million on membership every year

Beyond gyms, Irish people have been enthusiastic supporters of local sports clubs going back to the 19th century. Indeed, of the 2.6 million people who participate in sport and other activities, 30% are members of a sports

club – that's nearly 0.8 million people. Men are much more likely to be club members than women (43% of all active men vs 16% of active women), while older age groups (over 45) are more likely than younger groups to join sports clubs.

/// Nearly 0.8 million active adults are members of sports clubs

Not surprisingly, the GAA dominates in terms of club membership levels, comprising more than a third of all those in sports clubs – though members are slightly more female than male, against the run of most other clubs. As the chart shows, golf is a distant second in the rankings, followed by soccer to make up the top three.

Incidence of sports club membership – top 7 sports

	%
GAA	35
Golf	24
Soccer	21
Rugby	12
Athletics	9
Walking	8
Tennis	7



Base: all sports club members

Membership has its costs as well as its privileges, so how much do Ireland’s sports club members pay for membership? The average annual cost – across all sports – is €330 per annum (coincidentally, the same amount as the typical annual membership fee for a gym). That adds up to €255 million spent on sports club membership every year (and excludes the membership fees of those who do not participate in sports or other physical activities).

/// Sports club members spend a combined €255 million on membership every year

Of course, most sports club members spend a great deal more than just their membership fee in their clubs. Though it is outside the scope of this study, spending on events, prize draws, food and drink in sports clubs by members is another significant source of income for clubs.

Sport Spending

Beyond membership fees, there are several other sports-related categories of spending that amount to a significant part of the sport economy in Ireland. Take attendances at sporting events (amateur and professional, indoor and outdoor). We saw in the previous section that 2.3 million adults attend such events through the year (plus their children). The average sports fan spends €340 per annum on the various matches, heats and finals that attract them. The combined total expenditure on attendance at sporting events is therefore some €760 million – more than gym and sports club membership combined.

/// Spending on attendance at sports events adds up to 760 million per annum

Men account for two thirds of this spending (€547 million), while 25-34 year olds make up the largest individual age group – spending €278 million alone. Dublin accounts for the lion’s share regionally, at €318 million.

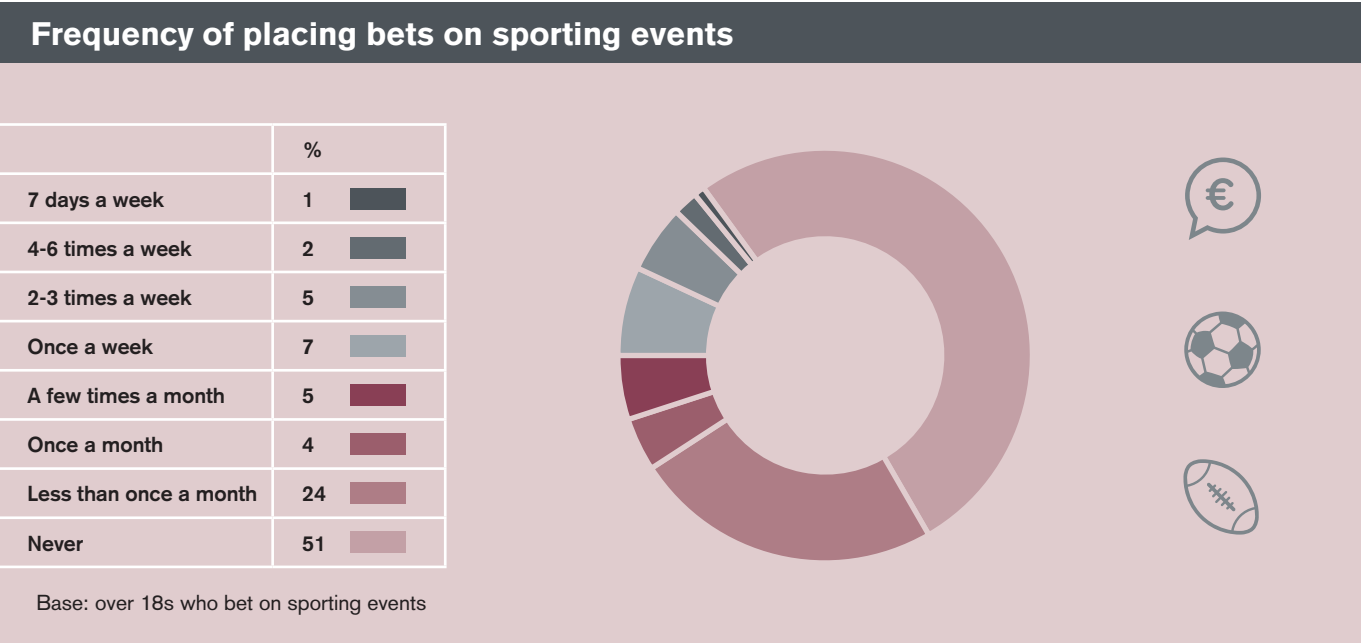
Nor do fans limit their spending to match tickets. Many buy replicas of their team jerseys, other team related products. This ‘sports memorabilia’ category is a big given that there are 2.8 million people interested in sport, and they typically spend about €70 each every year on their teams’ jerseys etc. Giving an annual total for the category of nearly €200 million. This is a category, by the way, in which Munster sports fans spend more than Dublin sports fans – €63 million vs €57 million.

/// Fans spend nearly €200 million on their teams’ jerseys and other memorabilia

So far we have focussed on membership and fan expenditure. But nowadays, spending on specialist sports gear – clothing, footwear, equipment – is a major feature on Irish main streets and in our shopping centres. Some 2.6 million adults actively participate in sports and exercise, generating a lot of demand for runners etc. In fact, the active Irish spend nearly €450 million on sports gear alone, on top of their other sports commitments.

/// The active Irish spend nearly 450 million every year on sports clothing, footwear & equipment

There is more of a gender balance when it comes to spending on sports gear – though men still outspend women (€265 million vs €185 million). The 25-34 age group are the big spenders in this category, at nearly €120 million each year.



Sport Betting

Nearly half of all adults in Ireland (over the age of 18) place bets on sporting events, whether regularly or irregularly – that's 1.6 million people. As the chart shows, one in seven over 18s (15%) place bets at least once a week or more often. However, the greater share of sports gamblers claim to do so much less often.

Some 61% of men bet on sports compared to just 30% of women. Young people (18-24) are less likely to bet than older age groups, though the next age group up – 25-34s – comprise the biggest cohort of gamblers. Dubliners are significantly more likely to bet on sport (53%) than people living in Munster (46%).

/// Over 1.6 million adults (over 18) place bets on sporting events

Gamblers spend an average of €200 per year on bets on sporting events. That equates to a total punt of €320 million each year – considerably more than is spent on membership of sports clubs, for instance¹. Those aged 25-34 tend to spend the most on average at €214 each per annum.

/// Gamblers bet €320 million in Ireland on sporting events every year

Betting and gambling have been transformed in recent years by the emergence of online gambling. That, and the emergence of smartphones and betting apps, has transformed the awareness of and interest in betting – and not just in sports. However, as the chart shows, most people still go to their local bookies to place their bets, though over half do use websites and mobile apps as well:

Channels used to place bets on sport

	%
I go into a store/ bookies	60
I go onto the website on my Laptop/PC	36
App on my Smartphone/Tablet	17
I go onto the website on my Smartphone/Tablet	14
Other (Specify)	4



Base: over 18s who bet on sporting events

¹— Estimates of the total value of gambling-related expenditure vary considerably, not least because people tend to under-report their spending on categories like gambling and alcohol consumption. The Gaming & Leisure Association of Ireland estimates that the total value of all land-based gambling in 2007 was €1.7 billion.

Source: www.glai.ie/gambling-in-ireland/

Again, the 25-34 year old age cohort is significantly more likely to use digital channels (web/apps) than other cohorts to place their bet, with stores and bookies rising as the main channel by age.

Some concerns have been voiced about betting on sporting events, especially in relation to addictive gambling behaviour. Indeed, our survey shows that nearly half of all adults over 18 agree that 'Ireland has a cultural gambling problem around sporting events'. Only one in four disagrees. Despite significant behavioural differences between the sexes and age groups, there is remarkable consistency when it comes to agreement about the existence of a problem.

It has been suggested that one way to deal with problem behaviour is to ban bookmakers from sponsoring sports related events and properties. We asked people in our survey whether they thought this should happen. Despite concerns about the incidence of a gambling problem, far more adults are against banning bookmakers from sponsorship than are in favour. Take the sponsorship of sports teams, for example. Fewer than one in four adults are in favour of banning bookmakers from sponsoring teams, while 45% are inclined to allow the sponsorship. Others are undecided. Similar ratios emerge in relation to bookmakers sponsoring sports events, stadia etc.

Indeed, when presented with a scenario whereby a sports organisation or team is unable to generate commercial revenues through other means, then the majority of people will accept sponsorship of the organisation or team by bookmakers. Fewer than one in five will reject the arrangement in such circumstances.

The Sports Economy

Our focus in this section has been on the different streams of consumer spending related to sport in Ireland. When we add them all up – as we do in the table overleaf – the value of sports-related expenditure is huge at €2.4 billion:

/// The Irish spend over €2.4 billion every year on sports

That's a lot of money. Though to put it in context, Irish consumers will spend €85 billion in 2014: therefore spending on sport will account for less than 3% of the total.

Consumers aren't the only ones spending money on sport. Brands spend a great deal too in the form of sponsorship and advertising. We turn to this topic in the next section.

Total annual expenditure on sport

Gym membership	€435 million
Sports club membership	€255 million
Attendance at sports events	€760 million
Sports memorabilia	€200 million
Sports gear & equipment	€450 million
Sports betting	€320 million
Total spending on sport	€2,420 million



SPORT BRIEFING: FUNDRAISING



Have you been on a charity walk, run or swim recently? Then you are not alone: 55% of all adults in Ireland participate in fundraising activities involving sport and other physical activities.

A quarter of adults in our survey take part in fundraising sports once a year, a similar proportion do so a few times a year. Fewer than 1 in 20 participate in fundraising more often than that. Women are more likely than men to fundraise through sports and activities such as sponsored walks (59% vs 52%), while 16-24 year olds are the most active participants: 67% of that age group have fundraised in the past year.

The typical fundraiser will raise about €300 in a year through their sports-related activities. That adds up to over €445 million for various causes. We have not included this figure in the 'sports economy' total since much of the fundraising – albeit involving sports and other activities – will often be for charities and non-sports organisations. Though undoubtedly many do raise money this way for team kits, club houses etc.

Nevertheless, it is another indicator of the social and cultural impact of sport in Ireland beyond the direct enjoyment of fans and participation of players.



Niall Quinn

Q Sat



When it comes to community participation in sport, Ireland is streets ahead of the UK in my experience. There is no real equivalent to the Community Games in the UK, nor the GAA for that matter. I see it myself in Naas where I am based now, and it's across all the sports. Until recently I was Chairman of the Kildare Sports Partnership, an initiative to drive participation in sport for all the community: senior citizens, children, the unemployed, disabled people and so on. Ray Darcy has just taken over as Chairman.

There's a similar partnership in every county in Ireland, and the idea is to help minority sports in particular (for example, badminton) with premises, insurance, training for volunteers etc. There's little or no budget for the initiative and everybody gives their time for free. But already it is having a big impact, for example, in partnership with back to work schemes. The Kildare Sports Partnership recently provided coaching training accreditation for 29 unemployed people from the county and 6 of them have gone on to find full time employment in sport so far. It's the volunteers who ran the scheme who deserve the credit.

However, I can't see how we can continue to develop sport in Ireland on the basis of voluntary effort and involvement, including GAA players. The Government has to put more resources into sport, recognising that the benefits are worth many more times the costs. It doesn't even have to take the form of government spending, instead they could offer tax breaks or reduced university fees for elite players who haven't yet gone professional. If the money is there to compensate residents around Croke Park, I don't see how financial support can't be made available for players. By providing financial support for elite athletes (in all sports) in the early, pre-professional stages of their career, they might be able to focus more on their training and performance, rather than 'double jobbing' just to make ends meet.

Likewise we need to rethink the role of sport in school. If the Government gave me one thing to do I would turn sport into a mandatory subject to nurture the love of sport and knowledge about fitness, diet and health. Too often, the school team gets all the attention and resources and the rest of the students are ignored. That's how it

was when I was at school. A different approach would educate our children to value their own fitness and wellbeing, and to see sport and exercise as something that is fun and rewarding for everyone, not the preserve of an 'elite'.

Looking at soccer in Ireland, despite good progress by the FAI in bringing on youth soccer, we still have a flawed system in my opinion. We continue to export 15-16 year old kids to clubs in England, usually with the result that they miss out on a proper education. Some clubs even want the kids to move over with their parents at the age of 12! It isn't like that in other countries; indeed the kids coming to English clubs from other countries are usually more mature and better educated. The Irish system is archaic and we need to look at what other European countries are doing to develop their young players up to the age of 18-21, to give them a better chance in life. The reality is that the vast majority – maybe 80% or more – of the Irish kids who go to clubs in England don't end up as professional players, but in the meantime they have missed out on the education that would equip them to do something else.

I wouldn't be surprised if private enterprise steps in to meet this need. It has started already in Brazil with 'player ownership'. There, a consortium will 'buy' players from a club, promote them around Europe, and continue to take a 'commission' from future transfer fees over the course of their careers. The original club gets nothing, though it might be better for the players as they are 'nurtured' by the consortium. It's not a nice development, but I wouldn't be surprised if something similar happens in Ireland as there are more opportunities for talented young players outside England these days and the Irish system isn't set up for it.

Right now, the English clubs seem to have all the power when it comes to cherry-picking young Irish players, so we need an alternative system in place. A better system will prevent the current waste of 'un-nurtured' talent and the zero fall-back position when 8 in 10 of these hopefuls fail to end up with a full time sports career. Other countries have done it, and so can we.

GAMBLING LEGISLATION



Brian Gormley
Partner, Philip Lee

Gamblers in Ireland bet €320 million on sporting events every year. We see in our findings that nearly half of adults agree that Ireland has a cultural gambling problem around sporting events.

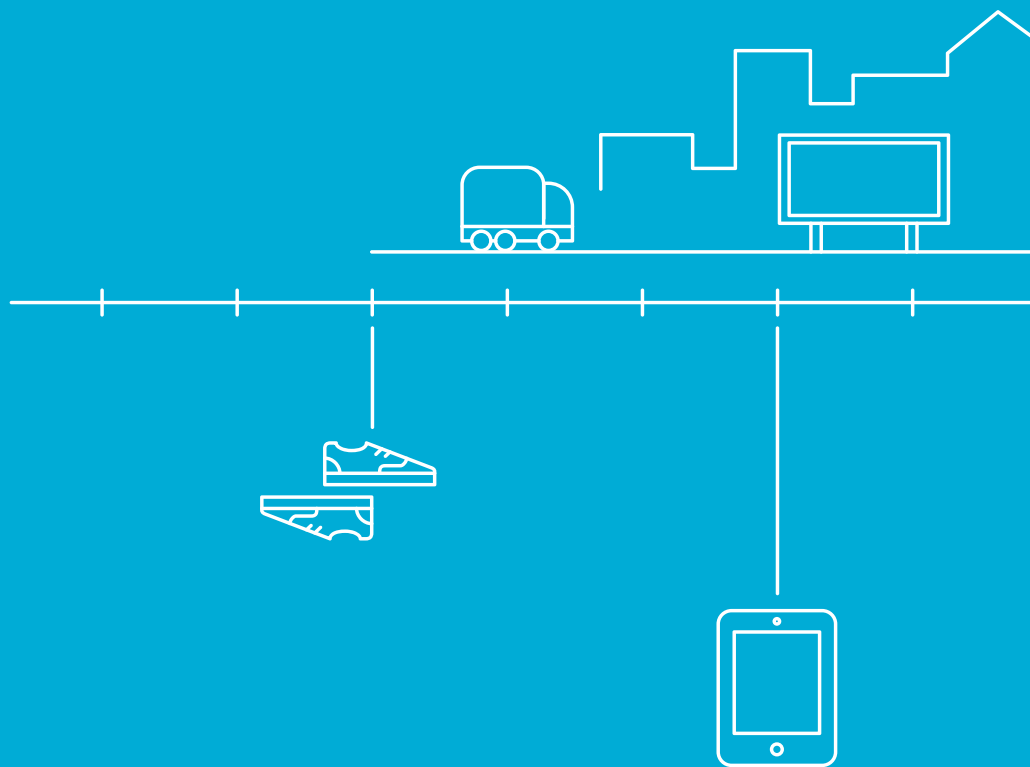
The Gambling Control Bill (The Bill) 2013 repeals and replaces the existing arrangements for the regulation of betting, gaming, bingo and lotteries, namely the Betting Act 1931 and the Gaming and Lotteries Act 1956 (except in respect of the National Lottery). It extends the licensing regime to include on-line and electronic gambling. The enactment of the bill will replace much of the present legislation in this area. It will provide a unified legal basis as well as streamlined and more effective administrative procedures. With younger gamblers increasingly likely to use digital channels the new bill will allow for legislation to adjust and respond more quickly to technological developments.

The proposals are guided by the widely accepted principles of gambling regulation, i.e. to ensure fairness in the conduct of gambling; the protection of vulnerable persons; the avoidance of circumstances where gambling could facilitate criminal activity; and consumer choice and protection.

Of interest to the sports industry is the application of these proposals to lottery licensing. Lotteries are frequently used by sports clubs as a means of fundraising. The Bill outlines specific licensing provisions where a lottery is linked to a charitable cause, including a non-profit sports or recreational club, facility, organisation or enterprise. Such funding activities may, for the first time, require a licence.

Sports such as horse racing benefit from levies on gambling activities. The Bill allows gambling licence holders to sponsor sporting activities, provided the activities do not involve people under 18. There may be an argument that the gambling industry contribute financially to the sport. The sport needs the money and the gambling industry needs the sports events. That also gives rise to the question of how the National Lottery funds are allocated. In the UK the national lottery is a major sponsor of sports activities. Should some of the money generated by the Irish National Lottery not be earmarked to fund sporting activities rather than submitted into the general exchequer?

③ BRANDS AND MARKETING



3. BRANDS AND MARKETING

Hardly a week goes by without one brand or another announcing a major sponsorship deal with a team, sporting event or league. Sports sponsorship in Ireland is big business – worth an estimated €100 million in fees paid by sponsors every year. But the ultimate aim of sponsorship is to win the hearts and minds of fans who may – in turn – become customers (or even remain customers) because of the positive associations created between a sponsor and a team or event. Our survey looks at the impact sports sponsorship is having nowadays.

/// Sponsors spend an estimated 100 million on sponsorship every year

Awareness

Different sponsors will have different ambitions for their investment in sponsorship. Some will simply want to generate awareness of their brand or product, especially if they are new to the market. Others will want to associate their brands with the values and ideals surrounding a team or sport, benefiting from a 'halo effect'. Still others will want to use their sponsorship to forge better and deeper relationships with clients and customers through entertainment, engagement and other activation practices.

This usually means that there is no simple, comparative measure that will clearly indicate that a particular sponsorship is 'performing' better than another. If two different sponsors have quite different sets of goals and targets

for their sponsorships, then comparisons will require a great deal of knowledge about their respective ambitions.

We note all this ahead of sharing some of the findings from our survey, since we have used a very simple measure – namely, unprompted awareness of brands associated with different team sports (but not specific events or teams). Usually this approach is combined with prompted awareness questions, but limits of space prevented us from doing so in this survey.

The first table shows the top brands associated with Gaelic football in Ireland, among those who are interested in Gaelic football (nearly 3 in 10 adults in the country).

The good news is that four out of five GAA fans were able to name one or more sponsors of Gaelic football. However, the bad news is that no brand connected with a majority of fans – even the likes of SuperValu and O'Neills were recalled by a minority of fans. Moreover, there is a very long tail of many other brands (not shown) cited by small numbers of fans and making up the rest of the 82% who named at least one sponsor. Nevertheless, one of the current sponsors – SuperValu – is in the top five for unprompted awareness (a very high bar it should be added). The other – eircom – is further down the ranking.

/// SuperValu has the highest level of unprompted recall among Gaelic football sponsors

Top 5 brands associated with Gaelic football (unprompted)

	%
SuperValu	16
O'Neills	13
Bank of Ireland	7
AIG	6
Guinness	5
Don't Know	18

Base: all adults interested in Gaelic football



Top 5 brands associated with hurling (unprompted)

	%
Guinness	21
Etihad	8
Centra	7
O'Neills	6
Liberty	4
Don't Know	21



Base: all adults interested in hurling

But just to add to the confusion, some brands – such as Guinness and Bank of Ireland – either don't sponsor Gaelic football, or used to but don't any longer. This in turn highlights some of the challenges facing 'first time' sponsors in a sport that may have a long legacy of previous associations – adding to the barriers sponsors must overcome in terms of association, brand saliency and emotional connection in order to secure the return on investment they require.

The picture for hurling is somewhat better from a sponsorship awareness perspective. Among those interested in the sport (one in four adults), all the current sponsors (Guinness, Centra and Liberty Insurance) make it to the top five.

Again, a number of non-sponsors or former sponsors also appear in the rankings, reflecting some of the same issues noted in relation to Gaelic football (though not exclusive to the GAA it should be added).

/// Guinness has the highest level of unprompted recall among hurling sponsors

Turning to rugby – a sport of interest to a third of all adults – sponsors face a different set of challenges to GAA, especially as there is a national rugby team that participates in international fixtures alongside strong provincial teams. This is reflected in the levels of unprompted awareness among rugby fans – the top five brands comprise a mixture of team sponsors (O2, Bank of Ireland), and league sponsors (Heineken, RBS).

As with GAA fans, there is a long tail of other brands identified by rugby fans tied to local sponsorships, legacy sponsorship and 'confused' sponsorship associations.

/// Heineken has the highest level of unprompted recall among rugby sponsors

The challenges facing rugby sponsors are, if anything, superseded by sponsors of soccer. Soccer is Ireland's favourite sport (4 in 10 adults are interested in soccer), and like soccer, fans range from supporters of teams outside Ireland to local clubs and school teams.

Top 5 brands associated with rugby (unprompted)

	%
Heineken	33
O2	14
Bank of Ireland	9
RBS	7
Guinness	5
Don't Know	12



Base: all adults interested in rugby

Top 5 brands associated with soccer (unprompted)

	%
Barclays	13
Three Mobile	11
Nike	9
Adidas	8
Aviva	4
Don't Know	16

Base: all adults interested in soccer



/// Barclays has the highest level of unprompted recall among soccer sponsors

Note that the brand with the highest recall among soccer sponsors isn't even in Ireland – pointing to the spillover effect of high profile events and teams outside of Ireland who nevertheless connect with Irish fans.

As with the issue of bookmakers and sponsorship, we asked in our survey whether people felt that alcohol brands should or should not be allowed to sponsor certain types of sport properties (teams, associations etc.). Interestingly, the issue provoked a more polarised response than that of sponsorship by bookmakers.

The table shows the responses of all adults over 18 to the issue of allowing or banning alcohol brands sponsorship – differentiating between different types of sponsorship.

Alcohol Sponsorship

Sport sponsorship is a contested area for some brands and stakeholders. Take the issue of alcohol brands and sport sponsorship. There are many health professionals and others who advocate the banning of alcohol brands (and others, such as soft drinks and fast food brands) from sponsoring sports. This reflects concerns about the emotional and behavioural associations fans – especially younger ones – make with particular products in the context of enjoying sport, leading to unhealthy patterns of behaviour.

While more people favour allowing alcohol brand sponsorship of sport than want to ban it, the gaps in some instances are quite narrow. Many are undecided, and while fans of different sports are usually more enthusiastic about allowing alcohol brands to continue sponsoring sport, the majority is still rather slim.

Should alcohol brands be banned from sports sponsorship?

	Allow %	Ban %	Undecided %	Don't Know Enough About Topic %
Sport Teams	41	35	18	6
Sports Associations	40	34	20	7
Advertising events involving sports people	40	34	20	6
Sport Competitions	44	31	18	6
Sport Stadiums	46	31	18	6
Other sport facilities	41	29	23	8

Base: all adults aged 18+

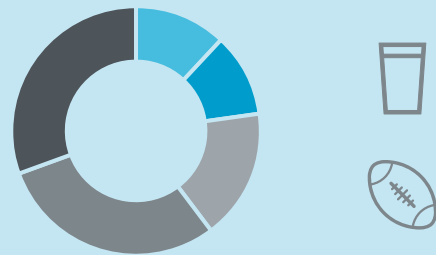


Sponsorship by alcohol brands is acceptable

if a sports organisation requires sponsorship to survive financially

	%
Strongly Agree	31
Agree	30
Neither/ Nor	17
Disagree	11
Strongly Disagree	12

Base: all adults 18+



However, as with bookmakers and sponsorship, when confronted with a scenario whereby a sports organisation requires sponsorship from alcohol companies to survive financially, then a clear majority of over 18s are in favour of continuing the sponsorship. See chart above.

Support for alcohol brand sponsorship in such circumstances is even higher among sports fans – rising to 7 out of 10 in the case of GAA and rugby fans, and two thirds of soccer fans. Though clearly a minority don't approve.

GAA TV Rights

Sponsorship isn't the only source of revenue for teams and organisations. Broadcasting rights can also be quite lucrative, especially as live events attract large viewing audiences that advertisers wish to target.

For example, the GAA announced a deal in early 2014 giving Sky TV broadcasting rights to 14 exclusive championship games, including two All-Ireland football quarter-finals, and selected provincial and qualifier games. Sky TV will also show the All-Ireland hurling and football semi-finals and finals live on a shared basis with RTE. Over two thirds of Irish adults in our survey are aware of the deal, rising to over 90% of GAA fans.

Two thirds of adults are aware of the GAA rights deal with Sky TV

Not all fans necessarily approve of sponsorship and broadcasting arrangements – as we saw earlier. When it comes specifically to the GAA/Sky TV deal, under two in five adults approve of the deal (see chart), and nearly half disapprove. Men are more likely to approve of the deal than women, and younger people are more approving than older people. Among GAA fans – both football and hurling – there is little difference vs the attitudes of the total population.

Given such polarised views – and given also the likelihood that broadcasting rights will become an even more contested area in future for most major sports – we asked those in favour why they thought the GAA/Sky TV deal was a good one; and those against why they thought it a bad one.

Turning first to those who approve of the deal, we can see from the table that the primary appeal is that the deal will promote GAA sports overseas, followed – at some distance – by the view that the money will help the sports at the grass roots level. Other potential benefits – improved coverage and higher attendances – come further down the list.

Agree or disagree with GAA deal with Sky TV

	%
Strongly Agree	17
Agree	20
Neither/ Nor	14
Disagree	14
Strongly Disagree	34

Base: all aware of GAA deal with Sky TV



Reasons to approve GAA/Sky TV broadcasting rights deal

	%
It will promote Gaelic games abroad	70
The money from the deal will trickle down to the grass roots level	51
The GAA should be allowed to sell TV rights to whoever they want	39
Sky TV will provide a better level of coverage than existing providers	25
Attendances may increase as people who cannot afford Sky TV chose to go to games	14
Other (specify)	3



Base: all who approve of the GAA/Sky TV deal

As for those who disapprove of the deal, we can see from the next table that the primary concern is that the deal will restrict access to the game for viewers. A large proportion of disapprovers don't believe the money will benefit grass roots sports, but as many feel the deal with Sky TV goes against the GAA's amateur ethos. There is even a vestigial anti-British sentiment for a minority, with some feeling the GAA should not have sold broadcasting rights to a British company.

/// 7 in 10 approvers of the GAA/Sky TV deal believe it will promote the game abroad

The strong reactions to the GAA/Sky TV deal in our survey point to some of the challenges facing sports organisations and even individual teams when it comes to generating new sources of income. The nature of the relationship between fans and their teams – and the organisations behind their favourite sports – is an emotionally charged one. Supporters are motivated by loyalty, tradition and passion to support their teams through thick and thin. As we saw in the previous sections, this translates into very high levels of time and money commitments that all teams and sporting organisations rely on to sustain them into the future.

But neither supporters nor sporting organisations can do it all on their own, the Government also has a key role to play. We turn to this theme in the final section of the report.

Reasons to disapprove GAA/Sky TV broadcasting rights deal

	%
Less people will now have less access to view live GAA championship games	70
Selling to the private market is against the amateur ethos of the GAA	47
The Money from the deal won't trickle down to the grass roots level	46
Those who cannot afford Sky TV will end up going to the pub and as a result children will be exposed to alcohol consumption	43
The GAA should not have sold rights to a British company	22
The sale of these rights is a first step towards paying players	15
Other (specify)	10



Base: all who disapprove of the GAA/Sky TV deal



SPORT BRIEFING: GAA PROFESSIONALISM



Should the GAA pay its players? We saw previously how important the amateur ethos of the GAA is to its fans when it comes to issues like the Sky TV deal. Paying players amounts to professionalism of the sport – something rugby did in the 1990s but the GAA has so far resisted.

We asked Irish people in our survey whether they agree with the GAA's policy of not paying its players. Some 32% of adults do agree with its policy, however, 43% disagree. The rest are undecided. Men are more likely to agree with the policy than women, while the highest level of disagreement by age is among 35-44 year olds at 48%. There is little difference across the regions. Perhaps not surprisingly, support for the policy is higher among GAA fans (over 40%) than the general public.

As for the future, the vast majority of adults – 73% - agree that the GAA should offer some sort of compensation for players. And despite their higher level of support for the current policy, GAA fans are even more in agreement with the future offering of compensation – with more than 80% approving of such a scenario.



Pat Gilroy

Veolia



Sport in Ireland can only thrive if it is growing at a local and community level. In my view, the good news is that, despite the recession, local funding for many clubs and teams is more sustainable than before thanks to community fundraising rather than corporate donations. Coffee mornings, bake sales and the like make for a healthier independence. It also provides more opportunities for people to contribute and participate but who may not necessarily have coaching skills. It would be a shame if this new pattern of support went away because more money was available from government or the business community.

That said, there are still challenges facing sport at a community level. In the case of Dublin GAA, we've been good at getting young children engaged in the sport, but when they reach, say, 16-17 many drop out – possibly turned off by the competitiveness at that level, or too much competition when younger and maybe it isn't fun anymore. I think that we need to get younger children interested in sport for life, not just for competing, to arrest some of these trends. We can learn from rugby in that regard – who it seems have been better at reducing dropout rates – and we now don't have any real competition in GAA up to the age of 12 in order to get kids into the sporting habit, which I think is really good.

Of course, getting children into sport also needs to involve the schools. My children are going to school in London at the moment, and they get an hour of physical activities every day – it's compulsory. The teachers need to be trained and equipped to do it, but the long run benefits to the country as a whole are potentially huge. Perhaps we need to make fitness, health and nutrition a Leaving Certificate subject?

As for adults, clearly there is a lot more interest in fitness and health than there used to be. Things like FitBit and other lifestyle monitors are becoming much more common to help people

become more aware of their own fitness (or lack of it). We all realise the increasing importance of fitness and health to our happiness and wellbeing, and I've no doubt we'll see a lot more innovation around technology and health. Indeed, I've trebled the amount of walking I do since I got my FitBit, so it seems to work!

At the professional level, it seems to me that professionalism has made sport worse in many cases. Sports aren't meant to be just elitist, only for the best. I think the experience of rugby in Ireland has been mixed – in some regards it may have professionalised too quickly, creating problems 'down the ranks' at club level. Nevertheless, I expect the GAA will face the same challenges in the next fifty years, especially if the sport takes off in the UK and United States, driven by TV broadcasting (and initiatives such as GAA GO). There isn't just one path to professionalism, of course, and we can learn from the different approach others have taken, including the US. I really believe that sport should be for all, sometimes those of us involved in competitive sport may not include others and that should change.

Sport should have a good future ahead of it in Ireland. We need to keep the best of what we've got and improve things where we can. I expect we'll see Ireland hosting more international events in the future as the quality of our stadia improves. However, we shouldn't overlook other bottlenecks when it comes to hosting such events. For example, do we have the transport infrastructure to accommodate the mass movement of huge numbers of fans – or the hotels for that matter?

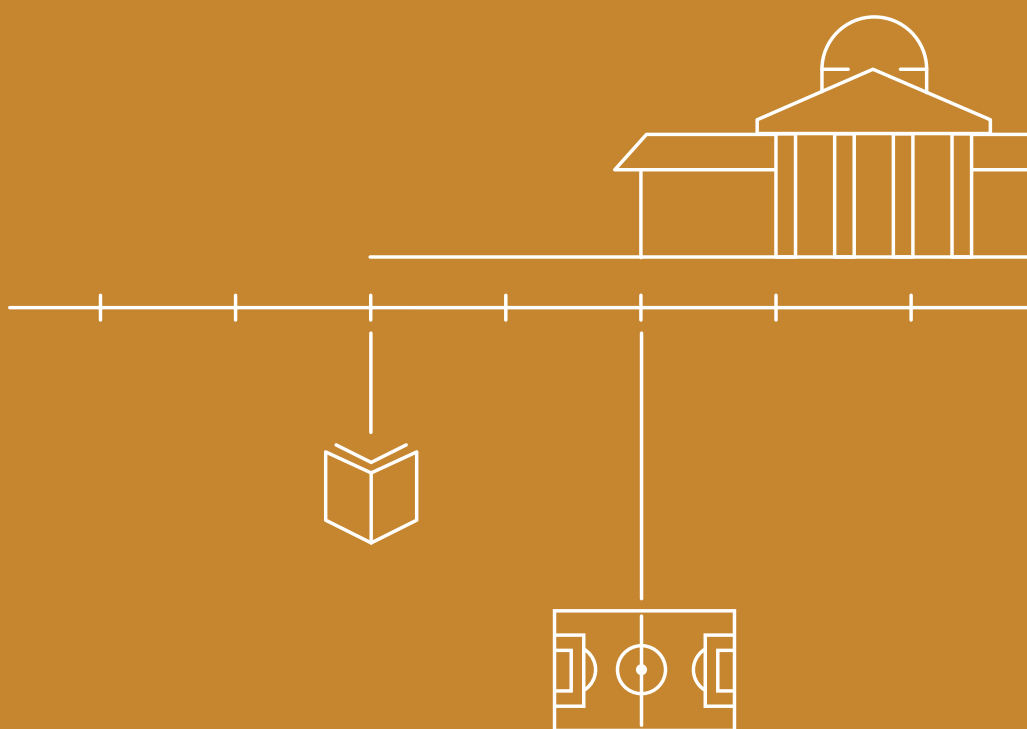
Whether at a grass roots level or an international level, we need to be better at co-ordinating and planning our activities around sport if we are going to reap the full benefits in the future. I think we can improve the co-ordination between sports councils, business and government bodies to achieve that end.

IS RTÉ SERVING THE COMMUNITY?

According to the Broadcasting charter, RTÉ commits to providing sports programming that reflects the demands for national, regional, minority, amateur and local sports in Ireland today. The Broadcasting Act 2009 states that “RTÉ shall ensure that the programme schedules of the broadcasting services referred to — provide a comprehensive range of programmes in the Irish and English languages that reflect the cultural diversity of the whole island of Ireland and include programmes that entertain, inform and educate, provide coverage of sporting, religious and cultural activities and cater for the expectations of the community generally as well as members of the community with special or minority interests and which, in every case, respect human dignity.”

We see from our findings that under two in five adults approve of the deal with the GAA and Sky TV. The strongest reason for disapproval is in relation to less access to view live games. This begs the question – Is RTÉ meeting the expectations of the community? Do the Irish people expect that GAA games be shown on free to air channels as it is our national sport?

④ POLICY AND SPORT



4. POLICY AND SPORT

If sport is big business, it is also a big policy issue. The Irish Government, like governments in other developed countries, plays a key role in providing direct and indirect support for the development of sport. For example, the Department of Transport, Tourism & Sport runs the Sports Capital Programme, which will total €40 million in 2014 alone. The programme is the main channel of support for developing sports facilities and purchasing sports equipment for sports clubs and organisations across Ireland.

But sometimes it is the indirect support from Government that matters more. Government can encourage sport participation through its health and education policies, for example. Like all policy issues, however, sport is also 'political'. The views of citizens and voters about the role of government in Irish sport tend to be both demanding and critical. Take a simple question like whether the Government is doing enough in Ireland to promote sport?

As the chart shows, almost twice as many people disagree than agree that the Government is doing enough.

On this issue there is little difference between men and women, or even by age group. However, among sports fans themselves, a clear majority reject the idea that the Government is doing enough for sport in Ireland.

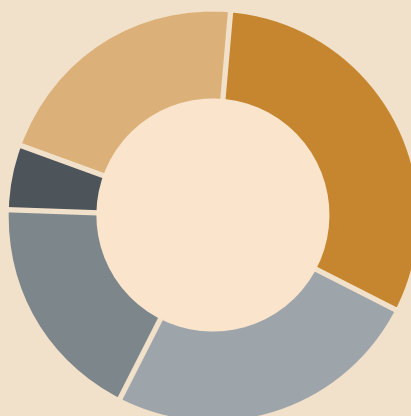
/// Nearly half of all adults feel the Government isn't doing enough for sport

Another indication of the high expectations voters have for the role of government in sport is the issue of funding. Despite several years of recession and cut backs, two thirds of adults think that government funding of sport should be increased. Most of the rest think it should remain the same. Once again, sports fans are even more positive about the idea of increased funding, with 8 in 10 supporting an increase.

As with all funding requirements, there are inevitably many, competing demands for funds. We asked people in our survey whether they thought it important for the Government to invest in sports infrastructure projects such as stadia, even ahead of other projects in non-sports areas.

The Government is doing enough to support sport in Ireland

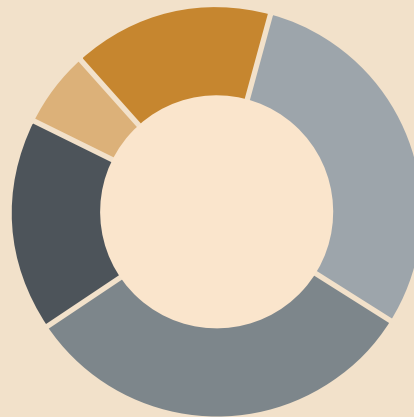
	%
Strongly Agree	5
Agree	21
Neither / Nor	31
Disagree	25
Strongly Disagree	18



Base: all adults

Importance of Government investment in sport infrastructure compared to other infrastructure

	%
Very Important	17
Somewhat Important	32
Neither/ Nor	30
Somewhat unimportant	16
Very unimportant	6

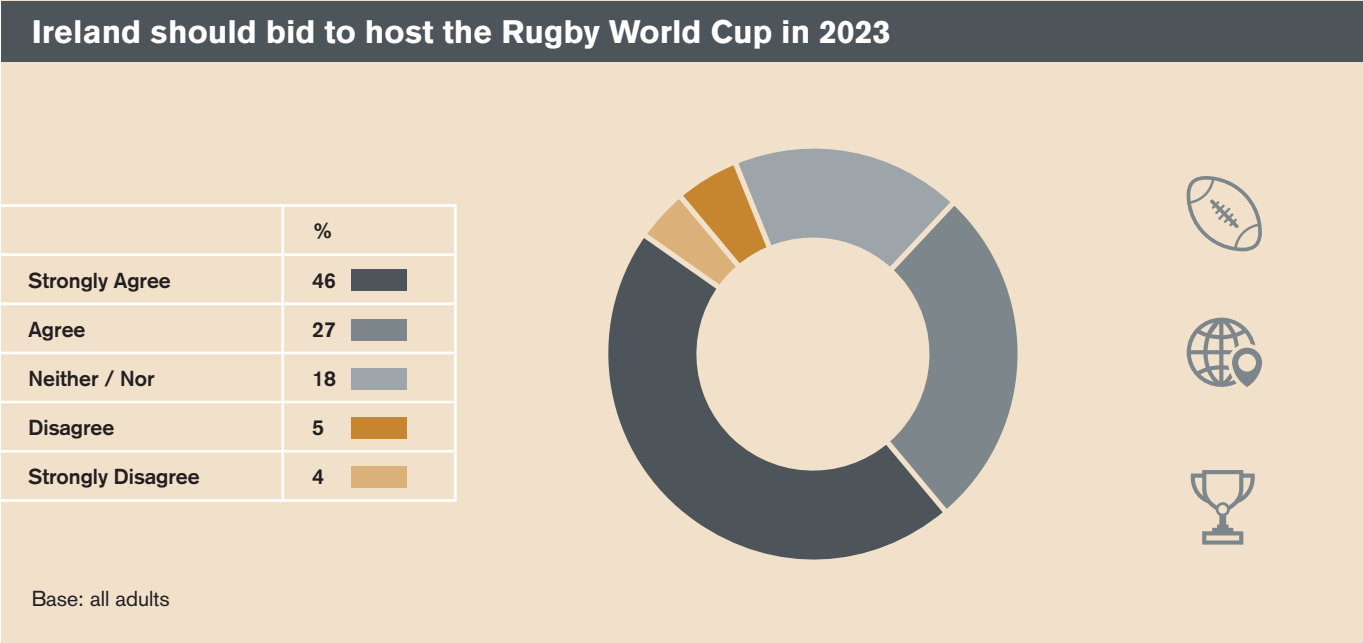


Base: all adults

/// Half of all adults feel the Government should prioritise sport infrastructure over others

Recent international successes for Irish teams and athletes have made many more aware of the contribution of sport to Ireland's image abroad and to tourism. Government plays a crucial role in tourism as in sport, so not surprisingly, half of all adults in our survey disagree that the Government is doing enough to promote Ireland as a sporting destination to tourists as agree it is doing enough.

Probably the most high profile example of policies aimed at attracting tourists through sport is the hosting of international competitions. The Irish Government is currently putting together a bid to host the Rugby World Cup (RWC) in 2023. There is a very high level of support for this initiative – in fact, nearly half of all adults agree strongly with the Government's decision to make the bid, as the chart reveals:



Not surprisingly, support is even higher among rugby fans (9 in 10 support the initiative). But more importantly – from the viewpoint of accessing stadia such as Croke Park – a similar proportion of GAA and soccer fans also support the bid.

/// 3 in 4 adults support the Government’s bid to host the Rugby World Cup in 2023

Government will continue to play a key role in supporting the development of sport in Ireland, whether at a grass roots level (through, for example, it’s capital programme), and at an international level, as in the case of the RWC bid. Government can’t do everything – and nor do citizens and fans expect it to. But it can play a powerful, catalytic role in maximising the return on scarce resources in the sporting sector to ensure the benefits are more evenly spread and fully optimised.



SPORT BRIEFING: DIGITAL SPORT



Another aspect of sport influenced by government policy is that of technology and innovation. While much of the focus in the IT sector has been on social media and similar applications, the area of health and fitness is ripe for a technology-led revolution.

Eight in ten people in our survey have smartphones. Of these, a third have one or more apps relating to sport, and 37% have app(s) relating to exercise and fitness. Twice as many men as women have sports apps, while golf fans are the most enthusiastic users (at 50%). Among those who have exercise and fitness apps, the vast majority relate to running and walking:

Type of Exercise Apps on Smartphone%

Running / Walking	71
Home workouts	38
Gym work	26
Cycling	18
General Fitness	3
Other	1

Of course, the application of IT to sport and fitness is not confined to smartphones and apps. New technologies such as FitBit and other 'wearables' are enabling users to better measure and track their performance and wellbeing. Already, 15% of adults in our survey say they own a wearable device to monitor their fitness when exercising. Women and those aged 25-34 are more likely than average to use such devices.

As for the future, the trend is clear: 47% of those who don't currently use fitness devices say they will consider using a data monitoring device or service to track and improve their fitness over the next twelve months. That's 1.3 million people – spending on sport and fitness technology looks set to take off.



John Treacy

Irish Sports Council



It might sound like a surprising thing to say: but the recession has been good for sport in Ireland! Many people who were not active before are now active in sport and other physical activities. For some, it's simply that they have more free time, including time to volunteer in local clubs. For others it's a recognition that they need to invest in their own health and wellbeing. Both the Department of Health and the Irish Sports Council have put out a strong message that now is the time for people to take control of their fitness and health, and the message is getting through.

Of course, there has been a funding squeeze for many sports clubs and organisations. Most have coped with the new economic realities, indeed some are currently experiencing capacity issues due to higher intakes. This is beginning to change – for example, through the re-opening of the Sport Capital Programme – but the resilience of community-level sports in Ireland is testimony to commitment of tens of thousands of members and supporters throughout the country.

I expect we'll see even more people participating in fitness and sport as the recovery gets underway – people get hooked on the endorphins! Also it's a virtuous circle: as fitness improves so does health and productivity, so people become more determined to stay fit. The bottom line is that even when the economy returns to full health, most people will continue to invest in their own health and wellbeing.

We know from research that regular exercise improves your quality of life and can even 'turn back' your body clock – benefits that will appeal to many more people as our population grows older like in other European countries. Healthy Ireland – an inter-departmental initiative chaired by Keith Wood – is a good example of how the Government can play its part in putting health and fitness at the centre of policy. Nearly a quarter of our population has been 'left behind' when it comes to better health and fitness. We see this in the statistics for obesity and social deprivation.

The danger is that poor health – like poverty – will get stuck in an inter-generational cycle of recurring problems. We simply cannot afford as a nation to let so many citizens fall behind.

At the professional level, the National Governing Bodies have played a key role in driving elite and high-performance sports in Ireland. The Irish Institute of Sport has supported them by providing world-class coaching and development services using the latest in sport science and technology. Furthermore, the success of Irish sporting professionals on the international stage also helps our bids to host international sporting events.

We've demonstrated our ability to host such events before: the Ryder Cup and Special Olympics, for example, plus equestrian events on a regular basis. We are better positioned than ever to host events such as the Rugby World Cup in 2023, and maybe international soccer events thereafter. We should also host more American football games as the sport gathers more followers outside of the United States.

There are still gaps in our sporting infrastructure however. I would like to see the construction of a velodrome in Ireland – we already have world-class cyclists who would undoubtedly benefit from such an initiative. Likewise the building of an indoor sports arena on the National Sports Campus will also be hugely beneficial.

Whether at a professional or a community level, the economic impact of sport is enormous. We need to better appreciate the economic return on investment in sport and fitness – whether in terms of generating new incomes from hosting international events or reducing the need for health services in the future.

We need to be careful and strategic about the sports we invest in at a policy level – that way we can be confident about the economic impact for the country as a whole, and the ultimate benefits for all our citizens.



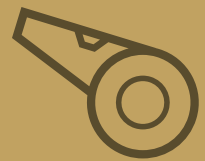
CONCLUSION

These are exciting times for sport in Ireland. Our survey and report confirms that Irish people in general, and sports fans and participants in particular, are playing their part in securing the future for sport. The commitments of time and money to sport from the Irish people and the Irish Government will sustain us through recovery and on to the next phase of development.

The economic value of sport is enormous: over €2.4 billion spent by the Irish people alone as supporters, parents, participants and consumers. Everyone benefits from this investment, whether through better health for the nation as a whole, or healthier finances for local businesses and retailers. Government also benefits through increased tax revenue (from citizens and tourists alike), as well as from fewer health service commitments (over the long run in particular).

Our report has indeed shown a snapshot of sport in Ireland at a critical juncture in its development. We are set for take-off: at a grass roots and international level.

Exciting times indeed.

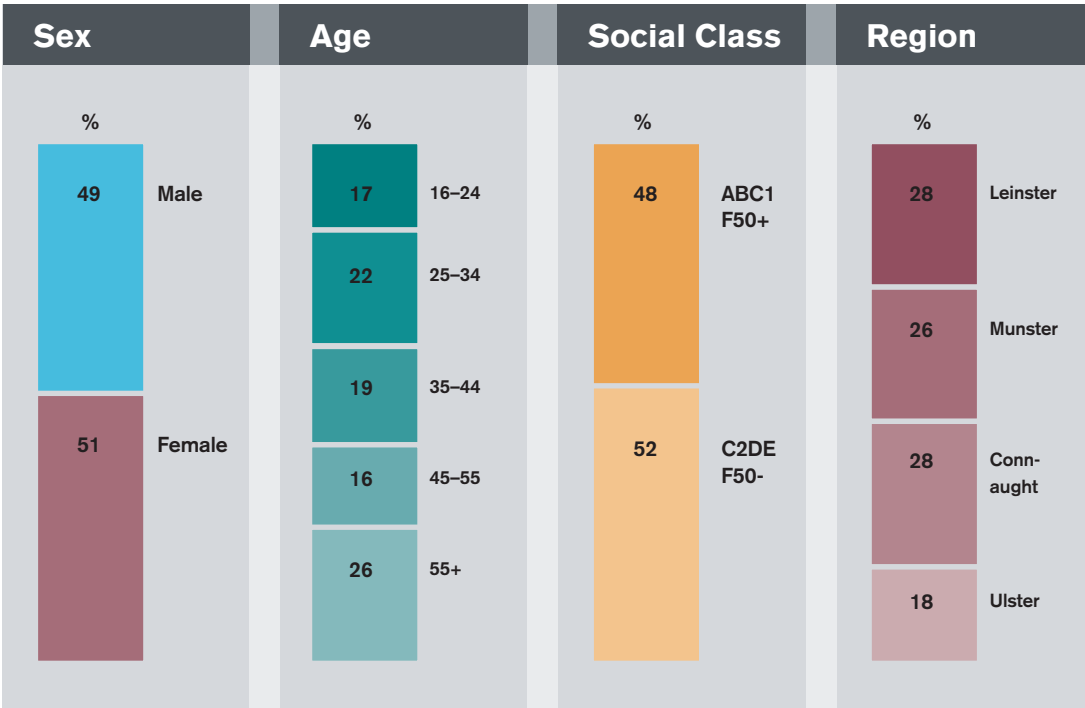


APPENDIX 1: METHODOLOGY

The survey for The Sport Report was conducted in May 2014.

Amárach polled a nationally representative sample of 1,000 adults aged 16-75 online, using quota controls for gender, age and social class.

The sample profile is as follows:



Base: All Irish Adults – 1000

APPENDIX 2:

FULL LIST OF SPORTS AND ACTIVITIES

Appendix 2: Full list of sports and activities.

Full list of sports and activities people are interested in, ranked in order:

Question asked:

Which of the following sports are you interested in? Tick all that apply.

	%
Walking	56
Soccer	47
Rugby	41
General fitness or weight loss activities	41
Swimming	38
Gaelic Football	34
Hurling	31
Tennis	30
Golf	29
Running	29
Cycling	28
Athletics (E.g Track or Cross country)	17
Boxing	17
Motorsport	15
Basketball	11
Cricket	10
Weightlifting or bodybuilding	10
Martial Arts	9
American Football	7
Camogie	6
Hockey	6
MMA	4
Fencing	2
Aerobics/ Yoga/ Pilates	2
Water sports	2
Other	2
Equestrian/ Riding	1
Dance/ Zumba	1
Squash/ Racket ball/ Badminton	1

Base: all those interested in sport and exercise

APPENDIX 2:

FULL LIST OF SPORTS AND ACTIVITIES

Full list of sports and activities people participate in, ranked in order:

Question asked:

Do you play or take part in any of the following sports or exercise? Tick all that apply.

	%
Walking	58
General fitness or weight loss activities	33
Swimming	26
Running	22
Cycling	18
Golf	16
Soccer	13
Weightlifting or bodybuilding	8
Gaelic Football	7
Tennis	7
Rugby	5
Hurling	4
Athletics	4
Basketball	4
Cricket	3
Martial Arts	3
Camogie	2
Boxing	2
Motorsport	2
MMA	1
Hockey	1
Equestrian/ Riding	1
Aerobics/ Yoga/ Pilates	1
Water sports	1
Dance/ Zumba	1
Squash/ Racket ball/ Badminton	1
Other	1
American Football	*
Fencing	*

Base: all who participate in sports and exercise



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