MARCH 2015

THE COMMUNITY IMPACT OF FOOTBALL IN NSW

ECONOMIC, HEALTH AND SOCIAL

FOOTBALL FEDERATION AUSTRALIA

NORTHERN NSW FOOTBALL

FOOTBALL NSW

Contents

Foreword

It has been 135 years since the first recorded organised game of football took place between Wanderers and the Kings School on Parramatta Common. Since then, football has well and truly moved into our mainstream national consciousness.

We commissioned this report from renowned strategy and research consultancy Sport Business Partners (SBP) and economic and demographic analysts Street Ryan so that we can fully understand the measurable contribution our game makes to the NSW community. We have more than 365,000 registered participants, and a registered player base 22% larger than all the other football codes combined. We are active in every corner of NSW and enjoy the support of every ethnic group.

What the report also demonstrates is that we are a sport for all ages, enjoying tremendous engagement with the extended family network. Women have long been keen followers and supporters of football, particularly in terms of their role in getting kids to and from junior competitions. But what is less appreciated is just how many women are now playing the game. Almost one-quarter of registered players, 64,000, are females.

Football also plays an unrivalled role in melding together our different cultures. We are indisputably the 'world game' so when migrants arrive they gravitate to football as a familiar entry point to their new community. Parents know that they can put their kids straight on the pitch because they already know the rules and can immediately feel more at home.

Our participation levels are already experiencing double digit growth because of the public's growing appreciation of the beautiful game and our increasing population levels. We also expect growth in our participation levels will accelerate even further given the enthusiasm with which the Australian community embraced the AFC Asian Cup tournament and the Socceroos' historic victory.

Yet, football is suffering more than most other major sporting codes from a lack of community infrastructure. We recently produced a report, Meeting The Future Needs of Football in NSW: A Partnership Approach which details - at a local community level - the facilities infrastructure that is needed if we are to cope with the growing demand resulting from our rapidly increasing participation rates. We have a real challenge ahead to provide the facilities to allow our players to change, train and play confident in the knowledge they are in a safe environment.

Football Federation Australia, Northern NSW Football and Football NSW are committed to delivering that much needed community infrastructure. Our primary role is to administer the game efficiently on the football family's behalf so that we can contribute to local infrastructure development. But we also need help from all levels of government. So it is also our role to ensure we have the evidence to show government that no other sport enjoys so much grassroots participation and no other sport can match football's return on the taxpayer's dollar.

Eddie Moore
Football NSW CEO

David Eland
Northern NSW Football CEO

We would like to thank every single one of our local clubs whose data and input has been so vital in giving us an accurate picture of the value football delivers and highlighting the gaps in infrastructure that are inhibiting us from making an even greater contribution to our communities. This report helps make our case and shows we are the ideal partner to help government create strong, vibrant communities.

Football occupies a unique place in the Australian sporting landscape

Football is the biggest participant sport in NSW with over 280,000 individual registered players.

Grassroots football continues to boom in the wake of the Socceroos AFC Asian Cup victory, with player registrations at record levels.

This is in sharp contrast to most other organised club sports in NSW which are struggling to hold members.

The challenge for Football NSW and Northern NSW Football is to **ensure the Future Needs of Football are met** so that every individual that wants to participate has a place to play.

Investment in the quantity and quality of fields is required as demand currently outstrips supply.

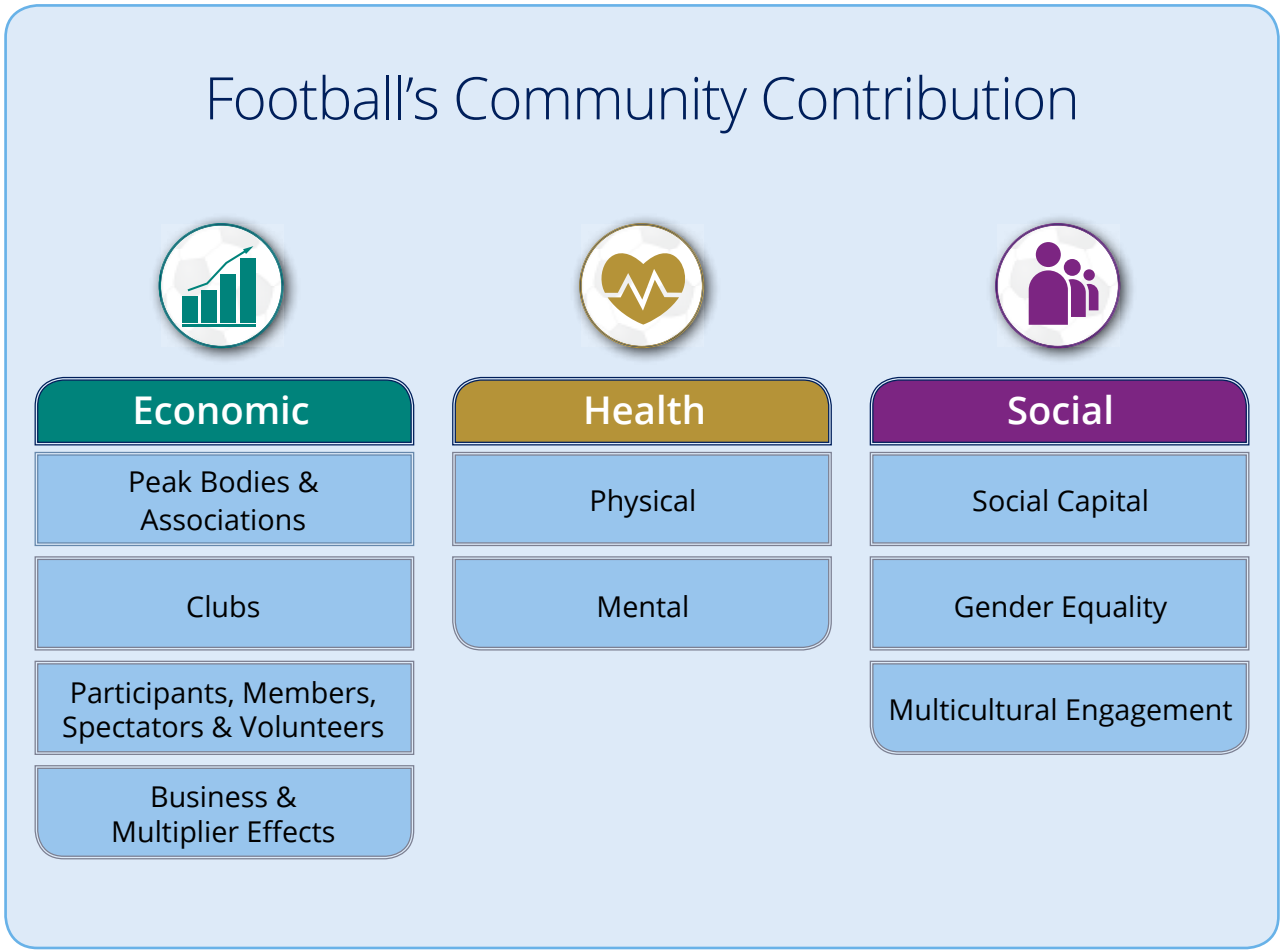
ANYONE FROM UNDER 5 TO OVER 45 CAN PLAY

22% OF PARTICIPANTS ARE FEMALES

INCLUDES ALL CULTURES LIKE NO OTHER SPORT

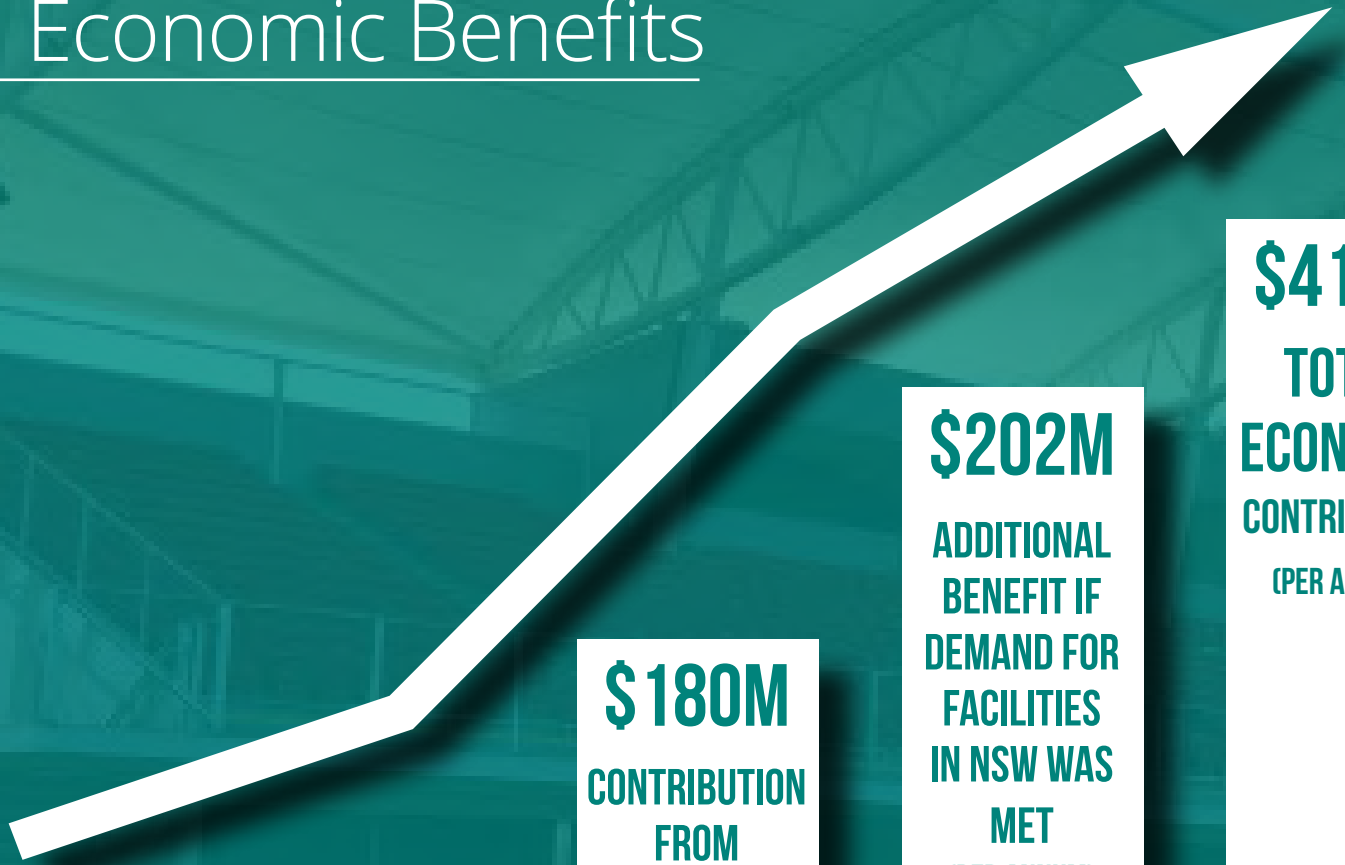
Investment in Football Facilities Benefits the Community

THIS REPORT PROVIDES COMPELLING EVIDENCE THAT INVESTMENT IN FOOTBALL FACILITIES HAS SIGNIFICANT ECONOMIC, HEALTH AND SOCIAL BENEFITS FOR THE ENTIRE COMMUNITY



Economic Contribution

Economic Benefits



$73.5M
FLOW ON EFFECT TO OTHER BUSINESSES (PER ANNUM)

$105M
CONTRIBUTION BY FOOTBALL CLUBS (PER ANNUM)

$180M
CONTRIBUTION FROM PLAYERS VOLUNTEERS SPECTATORS (PER ANNUM)

$202M
ADDITIONAL BENEFIT IF DEMAND FOR FACILITIES IN NSW WAS MET (PER ANNUM)

$417M
TOTAL ECONOMIC CONTRIBUTION (PER ANNUM)

Players, volunteers, coaches, referees and administrators make up a rich fabric of grassroots football which contributes **over $400 million annually** to the **NSW economy.** This excludes any contribution from the attendance of A-League, International Football or any other elite competition.

Economic Contribution

DURING THE PAST FEW DECADES SPORT AND RECREATION HAS EMERGED AS A FULL-SCALE INDUSTRY WITHIN THE AUSTRALIAN ECONOMY

Sport and Recreation is making substantial employment and financial contributions in all regions and at all levels (Local, State and National).

Grassroots football (including Futsal) is a large sector within the sport and recreation industry in terms of the number of participants, the number of volunteers and spectators, employment and contracting, and the collective expenditure generated by these people.

All this football activity generates economic activity directly and has an economic flow-on effect to other sectors of industry, such as administration; information technology; health services and education; retailing; construction; accommodation; food services; and transport.

The approach to valuing the economic contribution of football is similar to many other published studies of a similar nature, and includes data input from the Australian Bureau of Statistics Census of Population and Housing Data, Tourism Research Australia regional profiles, IBISWorld industry reports, as well as primary data related to participation and expenditure.

ECONOMIC CONTRIBUTION OF FOOTBALL NSW (Per Annum)	
Direct contribution	
FNSW, NNSWF and Associations	$58,070,000
Clubs	$105,430,000
Participants, Spectators, Volunteers	$180,430,000
Indirect contribution	
Business and Multiplier Effects	$73,560,000
Total	**$417,490,000**

Key Findings - Economic

THE TOTAL ECONOMIC CONTRIBUTION OF GRASSROOTS FOOTBALL PARTICIPATION IN NSW IS $417.49 MILLION PER YEAR

Football's Peak Bodies (FNSW and NNSWF) and Associations **contribute $58.07 million per year.**

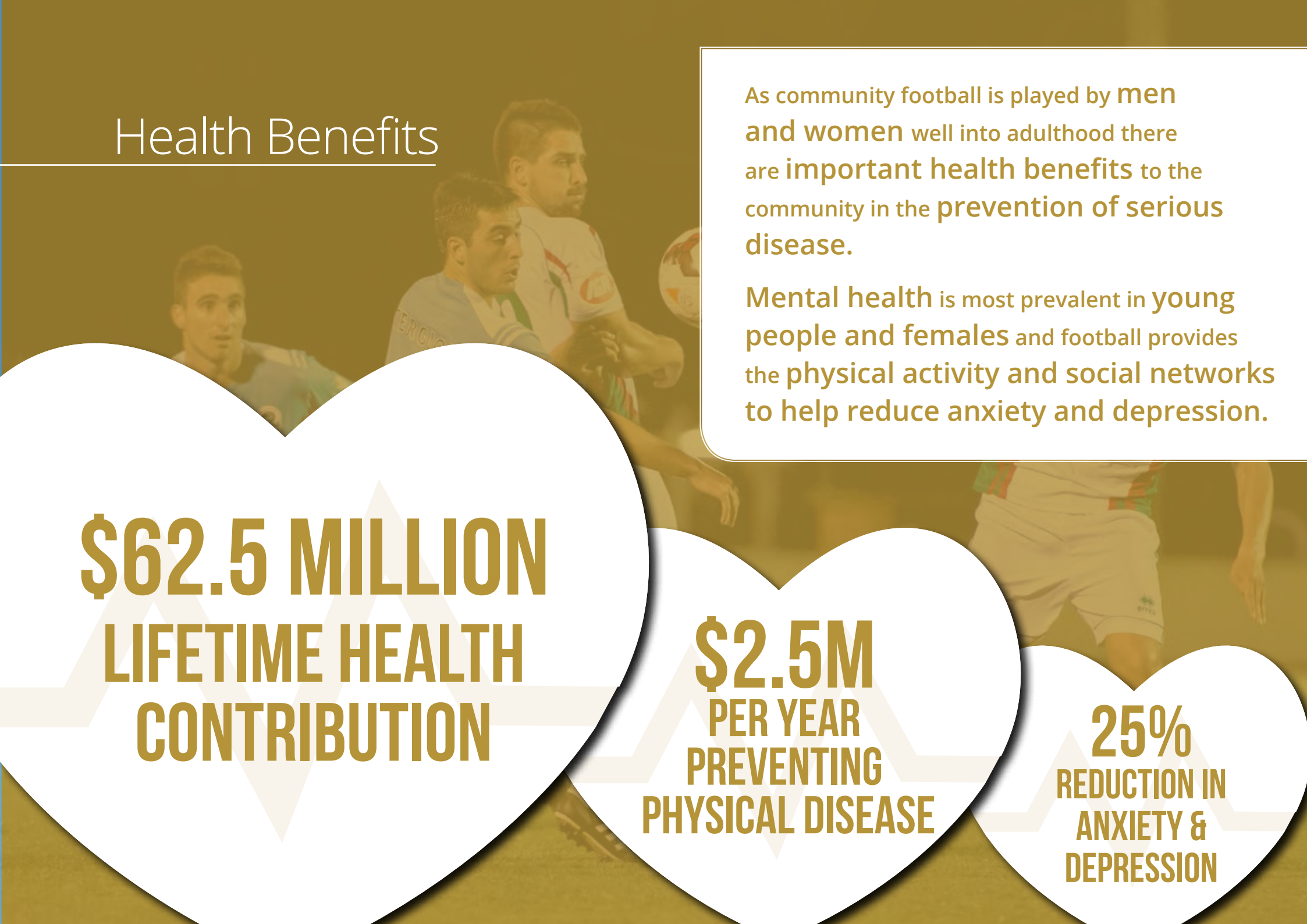
Collectively the **individual Football Clubs in NSW contribute $105.43 million per year.** The most significant portion of this contribution is from coaching, referee, medical and player payments ($32.4m), followed by administration ($23.9m), and equipment and grounds ($8.8m).

Expenditure by participants, members, spectators, and volunteers contributes $180.4 million per year. The majority of this expenditure (85%) is generated by participants and associated with the costs of clothing, equipment, food and beverage and travel.

The direct expenditure generated by grassroots football participation has a flow on effect to other businesses and is calculated through a multiplier effect. **The contribution of the Business and Multiplier Effects is $73.56 million per year.**

Health Contribution

Health Benefits



As community football is played by **men and women** well into adulthood there are **important health benefits** to the community in the **prevention of serious disease.**

Mental health is most prevalent in **young people and females** and football provides the **physical activity and social networks** to help reduce anxiety and depression.

$62.5 MILLION
LIFETIME HEALTH CONTRIBUTION

$2.5M
PER YEAR PREVENTING PHYSICAL DISEASE

25%
REDUCTION IN ANXIETY & DEPRESSION

Health Contribution

REGULAR PARTICIPATION IN PHYSICAL ACTIVITY PROVIDES SIGNIFICANT HEALTH BENEFITS TO INDIVIDUALS FROM BOTH A PHYSICAL AND MENTAL PERSPECTIVE

The physical health benefits are derived from the prevention of chronic diseases (ischaemic heart disease, type 2 diabetes, stroke, colorectal cancer and breast cancer). The mental health benefits are derived from the prevention of anxiety and depression.

The value of football's health contribution has been estimated based on the prevention of these selected physical and mental diseases amongst the 280,000 football participation base in NSW.

The key valuation approach is similar to many previous whole of sport industry studies, and includes data input from the Australian Institute of Health and Welfare and the Australian Government Department of Health.

Modelling of the health benefits of football is based on conservative estimates. It has also been modelled only on selected health issues which are evidenced to be attributed to physical inactivity. It is therefore likely that the health benefits of participation in football are significantly broader than what has been valued for this project.

HEALTH CONTRIBUTION OF FOOTBALL PARTICIPATION	
Yearly Physical Health Benefit	$2,521,858
Yearly Mental Health Benefit	$1,932,646
Total Yearly Health Benefit	**$4,454,504**

OTHER HEALTH CONTRIBUTION INDICATORS	
Football Lifetime Health Benefit*	$62,746,715
Number of Unique Participants	280,232

* The total football lifetime health benefit is calculated on the basis of the yearly health benefit multiplied by the average number of years of football participation for each age/gender segment (The average playing duration is 8 years and ranges from 4 years to 21 years)

Key Findings - Health

The total health contribution of football participation in NSW is **$4.5 million per year based upon 280,000 registered participants.**

Over the average duration in years of football participation, the **total health contribution is $62.7 million.**

Football's **physical health benefits contribute $2.5 million per year** due to the prevention of ischaemic heart disease, type 2 diabetes, stroke, colorectal cancer and breast cancer.

3 out of the top 6 most common diseases in Australia are preventable through physical activity, with **6.6% of all diseases being attributed to physical inactivity** according to the Australian Institute of Health and Welfare.

Physical inactivity is the fourth highest risk of disease behind tobacco, high blood pressure and obesity.

92% of the burden of disease resulting from physical inactivity is borne by people **aged 15 years and above** – therefore it is imperative that sport participants are encouraged to play well into adulthood.

Whilst the minimum level of physical activity recommended in order to prevent disease is based upon 5 x 30 minutes per week, **football participants on average play for 330 minutes per week.**

Football's **mental health benefits contribute $1.9 million per year** due to the prevention of anxiety and depression.

Mental disorders are the third most burdensome disease, and is most prominent amongst younger people and females. Football, as a mass participation sport with a high proportion of young participants and females (compared to other sports) is **well placed to deliver significant mental health benefits to society.**

Based upon the evidence used by the Department of Health to support the current physical activity guidelines, a conservative estimate of the **preventative effect of physical activity is a 25% reduction in risk of anxiety and depression.**

Social Contribution

Social Benefits

Those involved in grassroots football reflect the **multi-cultural nature of the community** like no other sport and through **connections made** in the **football social network** there are also **significant social and economic benefits to the community.**

83%

OF CLUBS INCLUDE PARTICIPANTS OF ANY CULTURAL BACKGROUND

22%

OF ALL PARTICIPANTS ARE FEMALE

86%

OF CLUBS INCLUDE FEMALE PARTICIPANTS

Social Contribution

GRASSROOTS SPORTS PARTICIPATION CONTRIBUTES A BROAD RANGE OF SOCIAL BENEFITS SUCH AS COMMUNITY COHESION, SOCIAL MOBILITY, SOCIAL INCLUSION AND SOCIAL CAPITAL

There are a range of unique social benefits that participation in football arguably does better than many other sports and community activities. This occurs most notably in the development of social capital which combines measures of trust (interpersonal and society), the diversity of personal networks, and the extent of an individuals engagement within a community.

Football participation also has unique strengths in the areas of multicultural engagement and gender equality.

The approach towards understanding the social contribution of football involved a literature review of sport's social impact, depth interviews with grassroots football stakeholders, review of survey data from 4,000 FNSW participants and 1,000 FNSW stakeholders, and Australian Bureau of Statistics data.

FOOTBALL'S UNIQUE SOCIAL STRENGTHS	
1	Multicultural Engagement
2	Social network diversity
3	Gender equity

Key Findings - Social

Unlike many sports in Australia, the **cultural diversity of the football participant base is highly reflective of the cultural diversity within the general population**. This includes people with European, Middle Eastern, Indian and Asian ancestry.

83% of football club stakeholders believe they provide an inclusive environment for participants of any cultural background (including new arrivals to Australia and those that may not speak English).

Due to global familiarity and passion for football, participants of diverse cultural backgrounds are drawn to the game without the need for targeted recruitment initiatives. **Football offers a familiar and welcoming environment** from which to begin creating strong links within a local community.

There are **13,559 registered FNSW coaches** who on average contribute 7.1 hours of volunteer time to their club each week.

86% of football club stakeholders believe that their football environment is **inclusive for female participants.**

Approximately **22% of football participants in NSW are female.** This is significantly higher ratio than most major sports, whilst the absolute number of females playing is comparable to sports with a female-focus, such as netball.

There are **11,317 registered FNSW administrators and general club volunteers** contribute on average 6.2 hours of volunteer time to their club each week.

According to the Australian Bureau of Statistics, **indicators of social capital amongst people who play sport** (i.e. Football NSW participants) **are higher than those that don't play sport.** This includes having a wider social network with greater diversity based on age, education and ethnicity; being more likely to volunteer; attend local events such as festivals and fetes; and in general have higher levels of trust and safety within their community.

Project Scope

THE OBJECTIVE OF THIS PROJECT WAS TO DETERMINE THE CONTRIBUTION THAT PARTICIPATION IN GRASSROOTS FOOTBALL PROVIDES TO THE COMMUNITY IN NSW.

Coverage

The focus of this project was to understand the contribution made to society by football participation across three key areas of economic, health and social.

Method

A range of valuation methodologies have been used in this project that are consistent with approaches and data inputs from the Australian Bureau of Statistics, the Australian Institute of Health and Welfare, the Australian Sports Commission, and the Australian Institute of Health and Welfare.

This project also incorporates primary research and statistics from surveys with approximately 4,000 NSW football participants and 1,000 NSW stakeholders.

Data Input

A wide range of data sources have been used to generate a holistic view of the contribution football in NSW makes to society. These include (but are not limited to):

1. Football-specific data

- Participant and stakeholders registration data
- Financial statements from grassroots football Clubs, Association and Football NSW
- 2013 survey results from 4,003 registered FNSW participants and 978 registered FNSW stakeholders (Administrators; Coaches; and Officials)

2. Government statistics

- Australian Bureau of Statistics Household Survey data (i.e. Multi-purpose; Expenditure; and Health surveys)
- Australian Bureau of Statistics Australian National Accounts
- Australian Sports Commission
- Australia Government Department of Health

3. Existing published research and statistics

- Australian Institute of Health and Welfare statistics

4. Stakeholder consultations

- Interviews with 6 representatives from NSW State Government departments and Local Government Authorities
- Interviews with 6 representatives from Football NSW grassroots clubs
- Interviews with 2 sponsors of Football NSW

Exclusions

This project has focussed purely on grassroots participation in Football in registered competitions. We have not attempted to understand the contribution and impact of the following:

- Elite or high performance football participation
- Attendance at A-League/W-League, international football (ie Socceroos) and any other elite football events or competitions.
- Participation in any private or un-affiliated tournaments, events, academies or skill-based programs
- Non-registered football participation that occurs in social and school programs.

> *"Huge involvement in the game in the community. Junior clubs are strong and growing. There is a huge sense of capacity that fosters the community spirit through the scale of the game at grass roots. There appears to be better engagement at community club level than other codes."*

Valuation Approach and Key Assumptions

The following provides an overview of the **conceptual methodology** towards calculating the economic contribution derived from football participation. The approach is similar to many economic contribution studies, and includes data input from the Australian Bureau of Statistics Census of Population and Housing Data, Tourism Research Australia regional profiles, IBISWorld industry reports, as well as primary data related to participation and expenditure.

- The Economic Contribution of football participation has been modelled across the whole of NSW.
- In addition to the whole of state contribution, within the region governed by Football NSW each participant has been allocated to a NSW Electorate to enable an estimated value for each Electorate. Football NSW has participants within 75 of NSW 93 Electorates, with the other 18 Electorates falling within the Northern NSW Football region.
- Estimate the expenditure of football's peak organisations, Associations and Clubs across affiliation/registration fees; kit and clothing; administration; marketing; coaching, referee, medical and player payments; equipment and grounds; trophies; events, canteen and presentations, and other general expenses.
- Estimate the expenditure of participants, members, spectators and volunteers on clothing; equipment; elite club membership (A-League/W-League); food and beverage; and travel costs.
- Estimates of the flow-on effect of direct expenditure was calculated from multipliers generated from the national accounts and applied to each electorate using location quotients.

"IT'S A GAME THAT PROMOTES A SAFE ENVIRONMENT. IT BREAKS DOWN BARRIERS, SPEAKS MANY TONGUES, TALKS MANY LANGUAGES & ANYTHING THAT PROMOTES ACTIVITY, INCLUSION & ENGAGES WITH DIVERSE BACKGROUNDS IS A BIG PLUS."

Economic Data Input

The following data sources have been used as key inputs into the approach towards valuing the economic contribution of football. Each data source is presented in more detail over the following pages.

- Annual reports from Football organisations
- Analysis of financial statements and/or income and expenditure records from football peak bodies, associations and clubs
- Football NSW's participant database
- Survey of participant results from SBP
- Australian Bureau of Statistics Census of Population and Housing Data
- Tourism Research Australia regional profiles
- IBISWorld industry reports

Expenditure by Peak Organisations, Associations and Clubs

Football NSW is the governing body for Association Football in New South Wales. Football NSW promotes and facilitates game participation, and community programs. Financial statements were provided for Football NSW and Football Northern NSW as the State peak bodies.

Estimates were calculated for all associations and all clubs based on a sample of six metropolitan and non-metropolitan associations and twenty three clubs. These expenditure calculations were applied to electorates in New South Wales. Expenditure categories were developed to reflect information provided, and the type of expenditure (especially as it relates to the flow-on industry sector). Only 'recurrent' or operating expenditure items were included. Fixed asset items are long-term investments and would distort the estimates if they were included. Depreciation of fixed assets is included in the estimates where it has been included in financial statements. (Table 1)

Clubs were further classified as:

- Small, with fewer than 150 participant members
- Medium, with 150 to 800 participant members
- Large, with more than 800 participant members.

Expenditure by Participants, Spectators, Members and Volunteers

The adjacent table presents details of direct expenditure by participants, spectators, members and volunteers, associated with their participation in football in New South Wales, excluding payments made to their club or association. (Table 2) Expenditure includes:

- Expenditure on clothing and equipment (including A-League and W-League supporter expenditure)
- Elite club membership
- Health equipment
- Food and beverages
- Travel costs.

Table 1

Expenditure by Peak Organisations, Associations and Clubs			
Expenditure Category	**FNSW**	**NNSWF**	**Total**
Affiliation/ Registration Fees	$45,698,102	$10,657,644	$56,355,746
Kit & Clothing	$6,513,506	$1,568,235	$8,081,741
Administration	$18,047,319	$5,904,372	$23,951,691
Marketing	$4,068,115	$1,605,986	$32,433,174
Coaching, Ref, Medical and Player Payments	$26,518,731	$5,914,443	$32,433,174
Equipment and Grounds	$7,262,045	$1,617,978	$8,880,023
Trophies	$1,264,206	$248,768	$1,512,974
Events, Canteen and Presentations	$2,388,996	$237,005	$2,626,001
Other	$18,346,239	$5,628,336	$23,974,575
Total	**$130,107,259**	**$33,382,768**	**$163,490,027**

Table 2

Expenditure by Participants, Members, Spectators and Volunteers			
Segment	**FNSW**	**NNSWF**	**Total**
Participants	$114,640,508	$37,035,443	$151,675,951
Spectators, Members, and Volunteers	$20,352,197	$8,401,230	$28,753,428
Total	**$134,992,705**	**$45,436,673**	**$180,429,378**

Note: Detailed breakdown of expenditure by Electorates within FNSW's area is provided in Appendix C.

Business and Multiplier Effects

Retailers of sporting goods sell a wide assortment of sporting equipment to meet diverse needs of consumers from occasional social participants to professional athletes.

In addition to the direct, or dedicated, football businesses (clubs, associations, coaching and training businesses, and sports equipment businesses) there are many indirect business activities that flow on from this direct expenditure. Hundreds of businesses and public sector organisations have a sizeable proportion of their annual turnover (and subsequent expenditure) derived from the expenditure made by associations, players, and other stakeholders in football.

Multipliers were generated from the national accounts and applied to each electorate using location quotients, to produce estimates of the flow-on effect of direct expenditure. This analysis has been relatively limited for the 2014/15 estimates (due to restricted data sources and lack of disaggregation in direct expenditure by expense categories).

Business types with flow on activities from football include: Accommodation; food service; Retail trade; Construction; Health services; Education services; Administration and support services; Art and recreation.

Advice from profiles of these businesses provided some insights into expenditure patterns, together with industry data on tourism and a range of relevant industry sectors. The indirect business and multiplier effect estimates are provided adjacent. (Table 3)

Economic Contribution by Electorates with FNSW territory

In addition to the whole of state community contribution calculated for this project, within the region governed by Football NSW each organisation and individual has been allocated to a NSW Electorate to enable an estimated value for each Electorate.

The Riverstone Electorate provides $20.17 million in economic contribution to the community. The Football NSW head office is located within the Riverstone Electorate explains the significant gap between Camden/Campbell as the Electorate with the second highest contribution.

Approximately half (47%) of Electorates with FNSW's territory contribute between $3-$6 million to the community. (Table 4)

Table 3

Business and Multiplier Effects (Indirect Contribution)			
Expenditure Category	**FNSW**	**NNSW**	**Total**
Construction	$1,675,943	$374,238	$2,097,376
Retail Trade	$9,889,782	$2,447,964	$12,425,810
Accommodation and Food Service	$7,552,846	$3,390,610	$11,041,121
Transport	$9,527,722	$3,920,546	$13,553,794
Admin and Support	$3,969,090	$1,365,681	$5,416,383
Health Care	$5,522,095	$1,368,011	$7,066,306
Arts and Recreation	$19,778,958	$1,225,473	$21,963,775
Total	**$57,916,436**	**$14,092,525**	**$73,564,565**

Note: Detailed breakdown of expenditure by Electorates within FNSW's area is provided in Appendix C.

Table 4

Rank	Electorate	Total Contribution	Rank	Electorate	Total Contribution
1	Riverstone	$20,174,310	11	Menai	$6,581,531
2	Camden/ Campbell	$12,712,246	12	North Shore	$6,472,782
3	Heathcote	$11,564,743	13	Castle Hill	$6,445,637
4	Miranda	$9,994,677	14	Epping	$6,320,077
5	Ku-Ring-Gai	$8,645,720	15	Hornsby	$6,019,522
6	Wakehurst	$8,156,281	16	Cronulla	$5,955,729
7	Manly	$7,817,439	17	Ryde	$5,763,519
8	Hawkesbury	$7,415,583	18	Gosford	$5,759,120
9	Lane Cove	$7,104,359	19	Mulgoa	$5,675,654
10	Keira	$6,873,162	20	Blue Mountains	$5,670,932

Distribution of Electorates within FNSW territory by Contribution	
% of Electorates	**Contribution ($)**
33%	< $3,000,000
47%	$3,000,001 < $6,000,000
21%	>$6,000,001

Valuation Approach and Key Assumptions

The following provides an overview of the **conceptual methodology** towards calculating the health benefits derived from football participation. The approach is similar to many previous whole of sport industry studies, and includes data input from the Australian Institute of Health and Welfare and the Australian Government Department of Health.

Physical Health

- Evidencing the negative effects of insufficient physical activity. The seminal study by Begg et al (2007)1 attributed 6.6% of the burden of disease in Australia to physical inactivity. The specific diseases resulting are ischaemic heart disease, type 2 diabetes, stroke, colorectal cancer and breast cancer.
- Identifying the total number of Disability-Adjusted Life Years (DALY's) lost due to diseases caused by physical inactivity, and then calculating the equivalent contribution from a per person perspective.
- Understanding the expected life duration based on current age and gender segments, as well as the average duration in years of football participation.
- Calculating the Value of a Statistical Life Year (VSLY) based upon Department of Finance best practice guidelines. The VSLY used is $181,129.
- Modelling the actual number of football participants (across age and gender segments).
- The basic formula for calculating physical health benefits is therefore:- Physical Health = No. Of Participants x DALY's prevented x VSLY x (1-year of Football Participation/Expected Life Remaining)

Mental Health

- Calculating the mental health benefits was similar to the method used to calculated physical health, with a number of adjustments as follows.
- Evidencing the preventative effects of physical activity on anxiety and depression. Based upon the evidence used by the Australia Government Department of Health to support the current Physical Activity & Sedentary Behaviour Guidelines for Adults (18-64 years)[2], we have estimated that physical activity has a 25% preventative impact on anxiety and depression.
- Identifying the total number of Disability-Ability Life Years (DALY's) lost due to anxiety and depression, and then calculating the equivalent contribution from a per person perspective.
- The basic formula for calculating mental health benefits is therefore:- Mental Health = No. Of Participants x (DALY's from anxiety and depression/preventative effect of physical activity) x VSLY x (1-year of Football Participation/ Expected Life Remaining). (Table 5 & 6)

Health Data in Detail

Table 5

Health Contribution of Football Participation			
Participant Segment	**Physical Health Benefit**	**Mental Health Benefit**	**Total Health Benefit (Yr)**
Male 0-14 years	$0	$323,224	$323,224
Male 15-24 years	$15,977	$485,497	$501,474
Male 25-64 years	$2,078,668	$442,520	$2,521,188
Male 65-74 years	$64,640	$1,087	$65,727
Male 75+ years	$15,365	$55	$15,420
Female 0-14 years	$0	$132,182	$132,182
Female 15-24 years	$7,510	$338,686	$346,196
Female 25-64 years	$339,084	$209,392	$548,476
Female 65-74 years	$615	$3	$618
Female 75+ years	$0	$0	$0
Total	**$2,521,858**	**$1,932,646**	**$4,454,504**

Table 6

Other Figures	
Football Lifetime Health Benefit	**No. of Unique Participants**
$1,454,508	111,997
$5,265,472	51,516
$45,633,504	53,672
$1,386,835	173
$339,250	10
$502,291	28,329
$2,734,945	22,002
$5,429,911	12,530
$0	3
$0	0
$62,746,715	**280,232**

Data Input

The following data sources have been used as key inputs into the approach towards valuing the health contribution of football. Each data source is presented in more detail over the following pages.

Physical Health

- Health care expenditure in Australia
- Health care expenditure on Disease
- The cause of disease in Australia
- The burden of disease due to physical inactivity
- Disability-Adjusted Life Year (DALY)
- DALY's attributed to physical inactivity
- Value of a Statistical Life Year (VSLY)
- Recommended physical activity levels
- Average life expectancy and duration of football participation

Mental Health

- Health care expenditure on mental disorders
- The cause of disease in Australia
- The prevention of anxiety and depression
- DALY's caused by anxiety and depression

Health care expenditure in Australia[3]

According to the AIHW total heath expenditure on goods and services in Australia was $147.4 billion in 2012-2013. Over a ten-year period to 2012-2013, total expenditure on health equates to an average of 9.01% of Gross Domestic Product (GDP) per annum. From a NSW perspective, the average expenditure of health per person equates to approximately $5,977 in 2012-2013.

Health care expenditure on disease[4]

Whilst not all heath expenditure is allocated towards a specific category (such as disease) figures from 2008-2009 AIHW expenditure data show that approximately 11% of total allocated health expenditure is spent on cardiovascular diseases (the highest expenditure category). This is followed by neoplasms (cancers) at 7% and diabetes mellitus at 2% of allocated expenditure.

The cause of disease in Australia[1]

Cancer and cardiovascular disease are the two leading causes of disease in Australia, accounting for 37% of all disease. Whilst there are a range of risk factors that contribute to each disease group, physical inactivity is attributable to 3 of the top 6 diseases in Australia. This means sport participation is critical to the prevention of the overall burden of disease in the community. (Table 7)

The burden of disease due to physical inactivity[1]

In Australia, 32.2% of the burden of disease can be attributed to 14 selected risk factors (shown opposite). Of these risk factors, physical inactivity is the fourth highest cause at 6.6%, behind tobacco (7.8%); high blood pressure (7.6%); and high body mass (7.5%).

These findings are taken from a seminal study by Begg et al (2007) for the Australian Institute of Health Welfare (AIHW). The data from this study is widely used in Australia to measure the burden of disease, and has also been used in many similar studies to this one, including Muller et al (2010)5 and Access Economics (2010)6. Note that the Begg et al (2007) study is currently being updated by the AIHW using 2010 data, however this report is not due to be released until 2016.

Begg et al (2007) found five specific diseases which physical inactivity is an attributing factor. Ischaemic heart disease (also commonly known as Coronary Heart Disease) has the highest attribution at 3.4%, followed by Type 2 diabetes at 1.3%. (Table 8)

Physical Health

Table 7

Top 10 causes of disease in Australia		
Cause	**% of all Diseases**	**% of Disease attributable to physical inactivity**
Cancers	19	5.6
Cardiovascular disease	18	23.7
Mental disorders	13.3	-
Neurological & sense disorders	11.9	-
Chronic respiratory diseases	7.1	-
Diabetes mellitus	5.5	23.7
Unintentional injuries	4.8-	
Musculoskeletal diseases	4	-
Genitourinary diseases	2.5	-
Intentional injuries	2.2	-

Table 8

Disease burden attributable to 14 risk factors	
Risk Factor	**% Attribution**
Tobacco	7.8
High blood pressure	7.6
High body mass	7.5
Physical inactivity	6.6
• *Ischaemic heart disease*	• *3.4*
• *Type 2 diabetes*	• *1.3*
• *Stroke*	• *0.9*
• *Colorectal cancer*	• *0.6*
• *Breast cancer*	• *0.5*
High blood cholesterol	6.2
Alcohol	2.3
Low fruit and vegetable consumption	2.1
Illicit drugs	2.0
Occupational exposures and hazards	2.0
Intimate partner violence	1.1
Child sexual abuse	0.9
Urban air pollution	0.7
Unsafe sex	0.6
Osteoporosis	0.2
Total*	**32.2**

Note: the total is not cumulative as there is some overlap between risk factors

Disability-Adjusted Life Year (DALY)[1]

The Disability-Adjusted Life Year (DALY) is a single, consistent measurement of the years of life lost due to premature death and 'healthy' years of life lost. This measurement of the burden of disease is adopted and used by the World Health Organisation (WHO).

A study by Begg et all (2007) found that 50% of the burden of disease impacts people between the ages of 15-64 years of age. Football NSW has 48.9% of its participants within this same age bracket, which suggests there is a large portion of the participation base that contribute significantly to reducing the costs associated with disease burden.

Distribution of age, disease and FNSW participation			
Age Group	**Australian Population Distribution**	**FNSW Participant Distribution**	**DALY Population Distribution**
0 - 14 years	20.0%	51.0%	8.4%
15 - 44 years	43.4%	43.4%	24.1%
45 - 64 years	23.8%	5.5%	25.9%
65 - 74 years	6.8%	0.1%	16.3%
75+ years	6.0%	0.0%	25.4%

Physical Health

Disability-Adjusted Life Year (DALY) attributed to physical inactivity[1]

Based upon the findings from Begg et al (2007), it is possible to calculate the contribution of any given person, based upon their age and gender profile, to the DALY's lost as a result of physical inactivity.

Note that there is zero to very minimal DALY's lost due to physical inactivity for people between 0-24 years of age. This is an important distinction given that a significant portion of football participation is by people within this age bracket.

Therefore the health contribution of junior football

participation is not as significant at that of participation beyond 25 years of age where we know that the risk of disease due to physical inactivity increase. (Table 10)

Table 10

	Males					Females				
	0 - 14	**15 - 24**	**25 - 64**	**65 - 74**	**75+**	**0 - 14**	**15 - 24**	**25 - 64**	**65 - 74**	**75+**
DALY's attributed to Physical inactivity - Australian Population (A)	0	147	42,424	21,262	23,909	0	166	32,596	17,172	36,756
Australian Population, 2003 (B)	2,041,000	1,404,00	5,292,000	656,000	478,000	1,938,000	1,349,000	5,311,000	694,000	718,000
Ave. DALY per person (C) = (A/B)	-	0.0001	0.008	0.032	0.050	-	0.0001	0.006	0.025	0.051

Value of a Statistical Life Year (VSLY)[7]

The value of a statistical life year in 2014 is $181,129. This figure is calculated based on best practice guidelines from the Australian Government (Office of Best Practice, Department of Finance) who calculated the VSLY in 2007 as $151,000. In accordance with their recommendations, this figure has been indexed against the CPI inflation rate from June 2007 to June 2014. Some other studies have used a VSLY as high as $252,014 based on a global literature review conducted by Access Economics in 2008, however SBP has chosen to use a conservative VSLY to ensure consistency with Australian government guidelines and common practice.

Recommended physical activity levels[2, 8]

According to the Australia Government Department of Health, the current Physical Activity & Sedentary Behaviour Guidelines for Adults (18-64 years) are:

- Doing any physical activity is better than doing none. If you currently do no physical activity, start by doing some, and gradually build up to the recommended amount.
- Be active on most, preferably all, days every week.
- Accumulate 150 to 300 minutes (2 ½ to 5 hours) of moderate intensity physical activity or 75 to 150 minutes (1 ¼ to 2 ½ hours) of vigorous intensity physical activity, or an equivalent combination of both moderate and vigorous activities, each week.
- Do muscle strengthening activities on at least 2 days each week. For health benefits to be achieved through physical activity, a person must meet the minimum recommended levels of 3 x sessions of at least 20 minutes vigorous exercise; OR 5 x 30 minutes of moderate exercise per week. Whilst regulatory standards on the minimum recommended levels of exercise continue to evolve, it is these levels of the amount of physically activity that contribute health benefits that are representative of the currently available scientific evidence. Football NSW participants on average commit 5.6 hours per week to their football participation, and therefore are considered to more than sufficiently meet the requirements to achieve health benefits. Whilst not evidenced, it is also hypothesised that that benefits continue with more advanced levels of activity beyond that recommended.

Physical Health

Average life expectancy and duration of football participation[9,10]

The current life expectancy of individuals at their present age is show in the adjacent table. This has been calculated from ABS, 2014 Life Tables. It shows that a Male who is currently 25 years of age is expected to live to 82 years of age, whilst a Female 75 years of age is expected to live to 94 years of age.

The current life remaining has been factored into the calculation of the physical health benefits of football participation by valuing the contribution of one year of being physically active out of a person remaining life.

To illustrate this more clearly, we know that a Football NSW participant that is Male between 15-24 years of age has on average played 10.5 years of football. Therefore football cannot claim to be the source of disease prevention for that person's entire life, however it will contribute preventative health benefits for their remaining life.

Whilst it is regularly hypothesised that participation in team sport at a young age is likely to lead to a continued active life, it is not possible to model this effect, or in this instance for FNSW to take 'credit' for this future behaviour. However, given that we know that physical health benefits are generated in later life, it is imperative the strategies are devised to keep participants playing beyond 25 years of age.

Gender/Age Group	Current Life Expectancy (Years)[9]	Average Life Remaining (Years)[9]	Expected Average Duration of Football Participation (Years)[8]
Male 0 - 14 years	80	73	4.5
Male 15 - 24 years	81	61	10.5
Male 25 - 64 years	82	37	18.1
Male 65 - 74 years	85	16	21.1
Male 75+ years	93	6	22
Female 0 - 14 years	85	78	3.8
Female 15 - 24 years	85	65	7.9
Female 25 - 64 years	86	41	9.9
Female 65 - 74 years	88	18	0
Female 75+ years	94	7	0

Note: Taking into account the current age and gender distribution of football participants, the average duration of football participation across the total playing population is approximately 8 years.

Mental Health

Health care expenditure on mental disorders[4]

Whilst not all heath expenditure is allocated towards a specific category (such as disease) figures from 2008-2009 AIHW expenditure data show that approximately 8% of total allocated health expenditure is spent on mental disorders – this being the third highest disease expenditure category.

The cause of disease in Australia[1]

Following cancer and cardiovascular disease, mental disorders are the third most common causes of disease in Australia, accounting for 13.3% of all disease. Within the mental disorder disease category, anxiety and depression was the largest specific cause, accounting for 7.3% of all disease.

Top 10 causes of disease in Australia	
Cause	**% of all Diseases**
Cancers	19
Cardiovascular disease	18
Mental disorders	13.3
• *Anxiety and Depression*	• *7.3*
Neurological & sense disorders	11.9
Chronic respiratory diseases	7.1
Diabetes mellitus	5.5
Unintentional injuries	4.8
Musculoskeletal diseases	4
Genitourinary diseases	2.5
Intentional injuries	2.2

Mental Health

The prevention of anxiety and depression[8]

Based upon the evidence used by the Australia Government Department of Health to support the current Physical Activity & Sedentary Behaviour Guidelines for Adults (18-64 years), we have estimated that physical activity has a 25% preventative impact on anxiety and depression.

The 25% preventative impact has been used as a conservative estimate for a number of reasons. The Brown et al (2012) report identifies a range of studies which supported physical activity as protective against the onset of anxiety disorders and symptoms, with a reduction impact of 48-53%.

The Brown et al (2012 report also notes that there is substantial evidence that regular physical activity protects against the onset of depression symptoms and major depressive disorder. The reduction impact across a number of studies, was between 25-40% lower.

Whilst the evidence used by the Department of Health to support the physical activity guidelines address anxiety and depression separately, Begg et al (2007) do not. Begg et al (2007) reasoned that because of high levels of comorbidity between depression and anxiety, as well as the largely similar treatment pathways, these conditions should be combined. This resulted in the burden of disease as measured by DALY's to be grouped for both anxiety and depression.

Given that we know the collective impact of anxiety and depression in terms of DALY's, and separately the preventative impact physical activity has on both anxiety and depression, we have chosen the lowest preventative impact (25%) in order to take a conservative approach. (Table 13)

Disability-Adjusted Life Year (DALY) caused by anxiety and depression[1]

The findings from Begg et al (2007) show that anxiety and depression has a comparatively larger impact on a per person basis amongst the younger age groups, and females compared to males.

For the mental health aspects of this project we have calculated the number of DALY's caused by anxiety and depression that are likely to have been prevented due to participation in physical activity.

Across the various age segments, 25% of all DALY's lost due to anxiety and depression occur between the ages of 15-24, whilst 66% of all DALY's are lost to females. (Table 13)

Table 13

	Males					Females				
	0 - 14	**15 - 24**	**25 - 64**	**65 - 74**	**75+**	**0 - 14**	**15 - 24**	**25 - 64**	**65 - 74**	**75+**
DALY's caused by Anxiety and Depression - Australian Population (A)	9,554	17,868	36,126	1,430	343	15,507	29,946	80,515	321	175
DALY's prevented due to participation in physical activity (B) = (A x 25%)	2,389	4,467	9,032	358	86	3,877	7,487	20,129	80	44
Australian Population, 2003 (C)	2,041,000	1,404,000	5,292,000	656,000	478,000	1,938,000	1,349,000	5,311,000	694,000	718,000
Ave. DALY prevented per person (D) = (B/C)	0.0012	0.0032	0.0017	0.0005	0.0002	0.0020	0.0055	0.0038	0.0001	0.0001

Assessment Approach and Key Assumptions

The following provides an overview of the **conceptual methodology** towards assessing the social contribution of football participation.

- Literature review to understand the definitions and contextual approach towards what we have labelled as "community contribution". This includes social cohesion, social capital, social inclusion, and social mobility – these concepts are frequently used interchangeably although there are slight differences. For this project we have focussed on the development of social capital given this primarily looks at local networks within a community rather than society as a whole.
- Depth interviews with 10 individuals actively involved in football at a local community. This included 6 interviews with local club administrators and 4 interviews with local government authorities.
- Australian Sports Commission participation statistics across various sport and physical recreation activities were used to assess both the gender equality and absolute number of participants.
- A range of socio-economic indicators were used to compare football participants against the general population. Income, education, and cultural background data was obtained from a 2013/2014 Football NSW survey with approximately 4,000 participants and cross-referenced against data representative of the NSW population contained within the 2011 Census of Population and Housing.
- Football NSW stakeholder (coaches, administrators, and volunteers) attitudes towards the inclusion of participants from both genders, any cultural background and disability were established through a 2013/2014 survey data from approximately 1,000 FNSW stakeholders.
- In 2012 the Australian Bureau of Statistics produced a report which sought to establish a correlation between indicators of social capital and sports participation. For this project it is assumed that football participants are reflective of general sports participants in a range of social capital indicators (self-assessed health; personal stressors; work-life balance; feelings of safety and trust; social network size and diversity; and access to support).

"ON THE SOCIAL FRONT, FOOTBALL HAS ALL OF THE TOOLS TO BE A HUGE FORCE IN MAKING CHANGE AND RESULTING IN POSITIVE COMMUNITY AND SOCIAL OUTCOMES. THE NUMBERS IN FOOTBALL AND THE LONG TERM IMPACT, BOTH COMMERCIALLY AND AT GRASSROOTS, CAN BE SIGNIFICANT."

Social Data Input

The following data sources have been used as key inputs into the approach towards valuing the social contribution of football. Each data source is presented in more detail over the following pages and in the appendix.

- The community benefits of sports participation
- What is a cohesive society?
- Football NSW Participant Social Indicators
- Football NSW Clubs catering to diverse participation
- Football NSW Volunteer Commitment
- Participation by gender amongst selected major sports
- Qualitative assessment of football's social impact
- Sport and Social Capital in Australia
- Football NSW Supply and Demand

The community benefits of sport participation[11,12,13]

Some of the social benefits of participating in sport are improved community identity, community cohesion, the promotion of community pride and ownership, and the promotion of ethnic or cultural harmony. A literature review by Atherley (2006) concluded that sport can help provide social benefits such as community integration, cohesion, cooperation, and community identity and pride. It is also evidenced that sport participation can contribute to crime reduction, community safety, education and lifelong learning, and environmental benefits.

What is a cohesive society?[14]

The OECD defines a society as "cohesive" if it works towards the well being of all its members, fights exclusion and marginalisation, creates a sense of belonging, promotes trust, and offers its members the opportunity of upward social mobility. Within this definition of 'social cohesion' there are three distinct aspects. These being social inclusion, social capital and social mobility.

- Social inclusion: is measured by aspects of social exclusion such as poverty, inequality, acceptance, and social polarisation.
- Social capital: combines measures of trust (interpersonal and society), the extent of personal networks, and the extent of an individuals engagement within a community.
- Social mobility: measures the degree to which people can or believe they can change their position in society. For the purposes of this study for Football NSW, the community contribution of football participation has focussed on the development of social capital and social inclusion.

Football NSW Participant Social Indicators[9,15,16]

Compared to the general population, Football NSW participants generally have a higher level of household income and education, which is consistent with Australian Sports Commission data that shows sport participation rates are significantly higher amongst households with higher income and higher levels of educational attainment.

From one perspective this is a positive indicator for current participants as they are obtaining health benefits and the development of social capital through sport participation. However from another perspective, it highlights the need for greater accessibility to participation opportunities amongst people with low income and education levels.

Whilst Football NSW participants have a higher proportion of people only speaking English compared to the NSW general population, they are over-represented in a number of languages. Football NSW have a higher proportion of Italian, Greek, Spanish, Croatian, Macedonian and German speakers amongst the participation base. This is indicative of the multi-cultural inclusiveness of the sport.

	FNSW Participants	NSW Population
Highest Education Level		
University degree	46%	20%
Diploma	12%	8%
Trade qualification	20%	18%
Annual Household Income*		
<$50k (FNSW) / <$52k (Pop.)	8%	38%
$50k<$110k (FNSW) / $52k<$104k (Pop.)	25%	25%
>$110k (FNSW) / >$104k (Pop.)	40%	26%
Not stated	28%	11%
Language other than English spoken at home		
Only English	78.5%	72.5%
Italian	3.2%	1.2%
Greek	2.9%	1.3%
Spanish	2.8%	0.8%
Arabic	1.5%	2.7%
Croatian	1.4%	0.3%
Macedonian	1.2%	0.4%
German	1.0%	0.3%
Hindi	0.8%	0.8%
Mandarin	0.7%	2.0%
Cantonese	0.7%	2.0%

* Note there were discrepancies in data set income ranges

Football NSW Clubs catering to diverse participation[9]

Football NSW club stakeholders (coaches, team managers, administrators, and volunteers) have positive attitudes towards providing an inclusive and welcoming environment for a diverse range of participants types.

Findings from a 2013 survey with FNSW stakeholders shows that 83% believe their club is inclusive towards people from any cultural background, whilst 86% believe their club is inclusive towards female participants.

Almost half (43%) of FNSW stakeholders believe their club is inclusive towards participants with a disability. This suggests that clubs would do their best to accommodate anybody within the limitations that facilities and competitions structure allow, however this aspect of participation inclusion is not actively pursued.

Our club provides an inclusive environment for...

Female participants	
Strongly agree	49%
Agree	37%
Neither agree nor disagree	7%
Disagree	2%
Strongly disagree	1%
Don't know	4%
Total	100%
Total agree	**86%**

Our club provides an inclusive environment for...

Participants from any cultural background (including new arrivals to Australia and those that may not speak English)	
Strongly agree	49%
Agree	34%
Neither agree nor disagree	12%
Disagree	1%
Strongly disagree	0%
Don't know	5%
Total	100%
Total agree	**83%**

Participants with a disability	
Strongly agree	19%
Agree	24%
Neither agree nor disagree	30%
Disagree	7%
Strongly disagree	3%
Don't know	17%
Total	100%
Total agree	**43%**

Football NSW Volunteer Commitment[9]

Volunteering within the local community is an indicator of social capital given the social networks and community engagement that result from this activity.

Football NSW coaches commit on average 7.1 hours per week volunteering with their Club, whilst administrators and volunteers commit slightly less at 6.2 hours per week.

These are significant contributions in volunteers hours, and represent the strong community impact the game has a grassroots level.

Number of Volunteers		
	Coach	**Volunteer/ Admin**
No. registered with FNSW	13,559	11,317

Weekly volunteer commitment (hours)		
	Coach	**Volunteer/ Admin**
Less than 1 hour	1%	2%
1-2 hours	6%	15%
2-3 hours	16%	18%
3-4 hours	15%	16%
4-5 hours	13%	10%
5-7 hours	14%	10%
7-9 hours	9%	8%
10-12 hours	12%	8%
12-14 hours	3%	4%
15-19 hours	4%	3%
20 hours or more	7%	6%
Total	100%	100%
AVG	**7.1**	**6.2**

Participation by gender amongst selected major sports[17]

Football across NSW has a significant participation base in terms of the total number of participants, as well as across bother genders.

According to the most recent participation data released by the Australian Sports Commission in 2013, Football (described in the report as Soccer) has a significantly larger participation base compared to most other organised sports.

Compared to the other major football codes, Football (soccer) has more participants than Australian Rules, Rugby League and Rugby Union combined.

The results from the ASC (2013) report provide limited accuracy when looking at male versus female participant bases (due to the scope and depth of respondents). However it appears Football trails behind only Netball in terms of the total number of female participants. We suspect that Netball is predominantly a female participation sport, and the majority of total participants are female.

These findings support the conclusion that football in NSW has a greater gender balance amongst participants compared to other sports, while it's also the largest organised sport in terms of absolute number of participants.

2012: NSW Participation in selected major sports ('000's people)[17]

	Males	Females	Total
Soccer (indoor & outdoor)	193.5	66.9	260.4
Netball	np	np	110.6
Dancing/ballet	10.1	73.3	83.4
Basketball (indoor & outdoor)	56.3	26	82.3
Cricket (outdoor)	73	---	73
Rugby League	np	np	63
Hockey	19	34	53
Rugby Union	np	np	52.5
Gymnastics	10.6	17.7	28.3
Australian Rules	np	np	19.2

--- = Nil or rounded to zero; np = Not available for publication but included in totals

Qualitative assessment of Football's social impact

In depth interviews with 10 individuals actively involved in football at a local community were conducted to identify football's unique strengths in delivering social benefits to individuals and the community.

These in depth interviews included 6 interviews with local football club administrators and 4 interviews with local government authorities.

Whilst football, like all sports, delivers a broad range of social benefits, the following were identified as unique strengths of football.

Social Network Diversity

In NSW, 58% of Grassroots Football Clubs have more than 150 members and there are 26 Clubs with more than 1,000 players. Over the past few years these figures have been growing and this trend is expected to continue over the coming years.

Over time the traditional Football offer has evolved into a broad range of products to meet the growing needs of this market. It is common for community clubs to have teams playing in juniors, men's, women's, over 35's, over 45's, masters and small sided social competitions.

With memberships of this size and a wide range of products comes great diversity. Bringing so many people together within any community setting will naturally provide a large mix of demographics, psychographics and cultural beliefs.

For members of Football Clubs, this brings great opportunities to develop their own social and professional networks.

Through our research, one of the common themes was the ability for Football Clubs to foster diversity within an individuals social network. This provides benefits such as fitting in at school, finding a local trade or part-time employment, developing business connections to accelerate professional careers, and engaging with a wider cross-section of the community.

> *"Football is a great outlet for males who don't usually talk to each other. Particularly in our area many are isolated because of their work, so football brings them together where they can talk, or at least be distracted."*

> *"All of our sponsors must be family friendly & community supportive."*

> *"It has very strong inclusiveness. Kids from any background can appreciate what soccer is and be placed on a pitch, know the rules...it is a great way to break down (social) barriers. We go into culturally diverse communities and schools where there can be 50-100 different cultures – and it has the ability to cut through."*

Multicultural Engagement

Football has the ability to transcend race, religion and gender within the community. It is a global sport with a national voice and increasing community penetration at the grassroots level.

As Australia's population continues to become more and more multicultural, so does the need for community integration. Given the familiarity of the game across the world, Football is a natural integration facilitator. It is a sport that speaks all languages.

Multicultural engagement has been synonymous with Football for a long time. At the community level it is not uncommon to have more than five nationalities represented in a single team of 11 players.

Our findings show that in years gone by, grassroots football clubs made a conscious effort to be a multi-cultural facilitator, but these days it has become seamless – 'we don't even think about engaging with particular communities, it just works'.

Being part of the 'Football Family' drives community engagement through shared passion and global familiarity for the sport.

"I'd never played the game before, but started playing with some of the other Dad's in the third grade competition. There was a guy from Chile, a guy from Japan and three Burmese blokes...just people I wouldn't normally meet or become friends with day to day."

"Our club doesn't target people from different cultures because we don't need to. The kids are just drawn to the sport because they already know the game and are familiar with it."

"We don't even think about engaging with particular ethnic communities, it just works."

Social Skills and Behaviour

The culture of a sports club can change from year to year and the tone is often set by the leaders of the day. There is no doubt that sporting clubs play a large role in shaping the behaviour of their members – for good and bad.

The common themes from our research indicate that at a junior level, the participants are generally more well rounded individuals than their non-sporting counterparts. The strongest messages related to their teamwork and spirit, having the ability to fit in, and respect for their leaders. It also gave children a greater understanding of a variety of cultures that they would not have had interactions with if it weren't for their Football club.

To provide context, the common comparison was with the non-sporting participant who are less fit, more anti-social, eating more fast-food and playing lots of video games.

At a senior level the benefits of persistence, perseverance and having harnessed an ability to work with others to achieve a shared goal were more common.

"Soccer is prepared to say "no" to idiots. The culture within soccer is much better than other sports. The culture depends on the playing group at the time, but the older heads can give the young guys guidance."

"There are many benefits here...it's a healthy, easy and active pastime. Those involved are less likely to tag a building, it builds a sense of ownership, and people are more active and therefore less likely to be involved in petty crime. It builds a sense of community and allows people to assimilate and build relationships."

"It reinforces teamwork, resilience, leadership and support and a healthy body and mind."

Community Connectedness

People develop deep affiliations with sport and can often identify themselves as being part of their community through their connections with sporting teams.

We have found that particularly in regional areas, players and members of a local community will develop a sense of belonging and local pride from their association with their local Football Club.

The typical grassroots football club will have many partnerships with local businesses and events. It is common for fundraising to occur at the 'local show' or school fete by organising volunteers to host a BBQ or sell raffle tickets.

We have also heard case studies of partnerships with the local police where the Club will develop a partnership to educate their members on community issues such as Stranger Danger, Community Protection and Family Violence.

There are many clubs running school clinics, come and try days for girls, and most of the Clubs involved in this research have various policies on offering scholarships, waving fees or using subsidised payment plans for disadvantaged members.

Grassroots football clubs also create opportunities for community members to utilise a well maintained multi-purpose grass field. This is opposed to other sports like hockey where facilities can sometimes be exclusive to just their sport.

> *"It's great. Volunteering is encouraged and is a critical part of the community. They are desirable, caring places to have in a community"*

> *"Football is absolutely critical to our community"*

> *"Football builds a sense of community ownership, and people are more active and less likely to be involved in anti-social behaviour"*

> *"Our local primary school uses our ground for their school carnival day"*

> *"Without the football club, you would have to travel out of town to access any organised physical activity"*

> *"Healthy football clubs make our area a more attractive place to live for families."*

Sport and Social Capital in Australia[18]

In 2012 the Australian Bureau of Statistics defined social capital as being "a resource available to individuals and communities founded on networks of mutual support, reciprocity and trust".

Social capital can contribute to both individuals (via outcomes in health, education, employment and family wellbeing) and communities (community strength and resilience). It is theorised that participating in sport develops social capital due to the community based social interaction that this involves.

The ABS suggests that whilst it is not possible to establish a causal link between sport participation and social capital, it is possible to establish correlations between the two.

From 12 selected indicators of social capital (see adjacent table), it can be seen that sport participants in comparison to non-sport participants are healthier, more engaged with their local community, and have closer relationships with their social networks.

Each of the sport and social capital indicators in the adjacent table are presented in more detail in Appendix B. (Table 21)

Table 21

Sport and Social Capital Indicators (ABS, 2012)		
	Sport Participants	**Non-sport Participants**
Self-Assessed Health Status (% Excellent/Very Good)	57%	40%
Personal Stressor (% that experienced personal stress)	63%	56%
Time in Current Dwelling (% less than 5 years)	43%	39%
Work-life Balance (% can meet family/community responsibilities)	92%	87%
Volunteership (% that volunteer)	42%	19%
Event Attendance (% attended community event/festival	72%	44%
Feelings of Safety (% that feel safe at home after dark)	88%	79%
Level of Trust (% that generally trust people)	56%	48%
No. of Confidants (% with 3 or more friends to confide in)	58%	37%
Contact with Social Networks (% with weekly face-to-face contact)	81%	73%
Social Network Diversity (% with friends of same ethnicity)	23%	33%
Access to support (% able to ask for small favours)	94%	88%

Football NSW Supply and Demand[9]

In 2014 SBP conducted research with 721 Football NSW Club administrators through an online survey.

The findings from this research indicated that Administrators identified there is a need for one additional pitch per club to accommodate their needs. Two thirds of Administrators also identify the need to improve the quality of the playing surface as their most desired facility improvement.

These findings highlighted the shortage in current facilities and an inability of Clubs to meet current player demand.

References & Appendix

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Appendix: A - About the Authors

SBP provides advice and insights to the sport and commercial business sector through a range of integrated strategic, commercial and market research services.

The firm was established in 2001 as a specialist strategic consultancy for the sport business sector, and for the last 15 years we have been a trusted adviser to more than 50 leading professional and Olympic sports, government agencies and commercial businesses across Australia, New Zealand and internationally.

In 2008 SBP developed an in-house market research division to complement our strategic consultancy experience. The result is an integrated market research and strategy solution, which combines powerful insights and problem-solving strategies.

The core services offered by SBP are based around strategic reviews and planning, market research and insights, commercial and business model advisory and business problem solving.

Illustrating the breadth of sporting experience within SBP, sports that it has worked with include Football Federation Australia, Athletics Australia, Australian Rugby Union, Cricket Australia, Gymnastics Australia, Baseball Australia, Golf Australia and the Australian Sports Commission.

Street Ryan has been established since 1981 and works on regional development assignments in metropolitan, provincial, rural and remote areas of every Australian state and territory. Initially a function of the focus on regional development, where a range of forecasting and modelling techniques were required, quantitative analysis and impact assessment have become core Street Ryan consulting areas in their own right.

Street Ryan has exhaustive experience and practical knowledge in sports assessment, participation censuses, economic and demographic analysis and projections. Our senior staff have been working in these areas for more than three decades. We have a long history in supporting national sporting organisation clients, including long-term relationships with the Australian Football League (AFL), Cricket Australia, Bowls Australia, and the Australian Rugby Union, as well as a range of shorter term assignments with Golf Australia, Softball Australia, New Zealand Cricket, Tennis Australia and Hockey Australia.

Beyond sporting organisations, Street Ryan specialises in regional development assignments around Australia for private and public organisations, often encompassing economic contribution and impact assessment and demographic analysis for capital development and investment projects, major events, tourism and industry sectors.

Appendix: B - Social Data Sources

Sport and Social Capital in Australia – Selected Indicators[18]

Self-Assessed Health Status		
	Sport Participants	**Non-sport Participants**
Excellent	22%	13%
Very Good	35%	27%
Good	30%	32%
Fair	11%	18%
Poor	3%	9%
Total	**100%**	**100%**

Time In Current Dwelling		
	Sport Participants	**Non-sport Participants**
Less than 5 years	43%	39%
5 years or more	57%	61%
Total	**100%**	**100%**

Volunteership		
	Sport Participants	**Non-sport Participants**
Volunteers	42%	19%
Not volunteers	58%	81%
Total	**100%**	**100%**

Personal Stressor		
	Sport Participants	**Non-sport Participants**
Experienced a personal stressor	63%	56%
Did not experience a personal stressor	37%	44%
Total	**100%**	**100%**

Work Life Balance*		
	Sport Participants	**Non-sport Participants**
Can meet responsibilities	92%	87%
Can not meet responsibilities	8%	13%
* Of those with family/community responsibilities		

Event Attendance		
	Sport Participants	**Non-sport Participants**
Attended cultural venue (past 12 mths)	92%	68%
Attended sporting event (past 12 mths)	64%	35%
Attended community event (past 12 mths)	72%	44%

Sport and Social Capital in Australia – Selected Indicators[18]

Safety

	Sport Participants	Non-sport Participants
Feel safe at home alone after dark	88%	79%
Feel safe at home during day	96%	90%
Feel safe walking alone after dark	53%	33%
* % Very Safe/Safe		

Number of Confidants

	Sport Participants	Non-sport Participants
None	10%	23%
1-2 friends	32%	40%
3-4 friends	32%	23%
5 or more friends	26%	14%

Contact with Social Networks

	Sport Participants	Non-sport Participants
Everyday	21%	19%
At least once a week	60%	54%
At least once a month	14%	17%
At least once in three months	4%	7%
No recent contact	1%	3%
* Face-to-Face contact		

Trust

	Sport Participants	Non-sport Participants
General trust people	56%	48%
Trust in hospitals	74%	70%
Trust in doctors	38%	37%
Trust in local police	77%	69%
* % Strongly Agree/Somewhat Agree		

Social Network Diversity

	Sport Participants	Non-sport Participants
Friends with same ethnic background	23%	33%
Friends of similar age	9%	17%
Friends with same level of education	12%	16%
* % All Friends of same level...		

Access to Support

	Sport Participants	Non-sport Participants
Are able to ask for small favours	94%	88%
Are able to ask for support in a crisis	95%	90%

Appendix: C

Electorate	Direct Contribution by FNSW, NNSWF, Associations and Clubs	Direct Contribution by Participants, Spectators, Volunteers and Members	Indirect Contribution from Business and Multiplier Effects	Total Contribution
Riverstone	$14,440,252	$2,386,621	$3,347,437	$20,174,310
Camden/Campbell	$5,040,409	$5,205,015	$2,466,822	$12,712,246
Heathcote	$4,616,710	$4,764,419	$2,183,614	$11,564,743
Miranda	$3,624,160	$4,504,643	$1,865,874	$9,994,677
Ku Ring Gai	$2,946,048	$4,471,075	$1,228,597	$8,645,720
Wakehurst	$3,366,314	$3,190,549	$1,599,418	$8,156,281
Manly	$3,690,396	$2,903,566	$1,223,477	$7,817,439
Hawkesbury	$3,650,096	$2,702,331	$1,063,156	$7,415,583
Lane Cove	$2,415,329	$3,625,128	$1,063,902	$7,104,359
Keira	$1,314,542	$4,328,316	$1,230,304	$6,873,162
Menai	$1,994,264	$3,450,663	$1,136,604	$6,581,531
North Shore	$3,851,435	$1,841,953	$779,394	$6,472,782
Castle Hill	$2,727,567	$2,830,299	$887,771	$6,445,637
Epping	$2,224,138	$3,273,217	$822,722	$6,320,077
Hornsby	$1,946,951	$3,094,991	$977,580	$6,019,522
Cronulla	$2,180,540	$2,699,060	$1,076,129	$5,955,729
Ryde	$1,999,972	$2,856,660	$906,887	$5,763,519
Gosford	$2,019,755	$2,527,960	$1,211,405	$5,759,120
Mulgoa	$1,869,426	$2,615,289	$1,190,939	$5,675,654

Electorate	Direct Contribution by FNSW, NNSWF, Associations and Clubs	Direct Contribution by Participants, Spectators, Volunteers and Members	Indirect Contribution from Business and Multiplier Effects	Total Contribution
Blue Mountains	$1,888,773	$2,595,143	$1,187,016	$5,670,932
Oatley	$1,880,315	$2,414,351	$1,078,036	$5,372,702
Balmain	$2,326,367	$1,957,212	$944,964	$5,228,543
Baulkham Hills	$2,180,157	$2,209,079	$686,645	$5,075,881
Blacktown	$2,459,855	$1,486,583	$892,042	$4,838,480
Wollongong	$1,879,489	$1,955,026	$987,632	$4,822,147
Rockdale	$1,944,104	$1,783,752	$1,088,410	$4,816,266
Wyong	$1,655,380	$2,062,300	$1,005,979	$4,723,659
Pittwater	$1,790,789	$1,713,943	$1,172,541	$4,677,273
Penrith	$1,591,671	$2,154,905	$896,658	$4,643,234
Smithfield	$1,877,639	$1,867,210	$862,571	$4,607,420
Bathurst	$1,555,408	$2,185,108	$727,987	$4,468,503
Orange	$1,561,335	$2,129,233	$659,708	$4,350,276
Kogarah	$1,385,842	$1,777,513	$777,160	$3,940,515
East Hills	$1,485,582	$1,670,383	$754,939	$3,910,904
Auburn	$1,436,380	$1,629,291	$799,308	$3,864,979
Drummoyne	$1,665,179	$1,559,004	$594,077	$3,818,260
The Entrance	$1,366,281	$1,569,062	$809,636	$3,744,979
Davidson	$1,346,913	$1,931,992	$437,763	$3,716,668

Electorate	Direct Contribution by FNSW, NNSWF, Associations and Clubs	Direct Contribution by Participants, Spectators, Volunteers and Members	Indirect Contribution from Business and Multiplier Effects	Total Contribution
Dubbo	$1,517,793	$1,489,078	$661,719	$3,668,590
Liverpool	$1,178,461	$1,729,367	$753,932	$3,661,760
Goulburn	$1,446,084	$1,443,019	$750,271	$3,639,374
Shellharbour	$716,347	$1,939,147	$744,895	$3,400,389
Willoughby	$715,293	$2,260,410	$409,467	$3,385,170
Canterbury	$1,539,101	$1,512,464	$303,083	$3,354,648
Bega	$1,052,048	$1,335,828	$841,683	$3,229,559
Bankstown	$1,265,870	$1,250,292	$658,514	$3,174,676
Strathfield	$1,312,032	$1,275,594	$580,103	$3,167,729
Coogee	$746,970	$1,763,009	$594,011	$3,103,990
Toongabbie	$1,097,298	$1,445,024	$536,789	$3,079,111
Terrigal	$665,931	$1,631,934	$623,831	$2,921,696
Murrumbidgee	$1,201,371	$1,224,632	$320,291	$2,746,294
South Coast	$1,089,102	$985,149	$641,097	$2,715,348
Marrickville	$1,217,774	$978,564	$505,893	$2,702,231
Wagga Wagga	$991,133	$1,113,854	$422,295	$2,527,282
Mount Druitt	$973,825	$1,032,260	$515,165	$2,521,250
Fairfield	$1,225,729	$724,167	$476,534	$2,426,430
Parramatta	$1,190,650	$691,951	$408,583	$2,291,184

Electorate	Direct Contribution by FNSW, NNSWF, Associations and Clubs	Direct Contribution by Participants, Spectators, Volunteers and Members	Indirect Contribution from Business and Multiplier Effects	Total Contribution
Cabramatta	$1,030,027	$782,563	$402,968	$2,215,558
Wollondilly	$703,255	$1,061,109	$447,519	$2,211,883
Macquarie Fields	$706,176	$1,041,195	$435,482	$2,182,853
Kiama	$1,110,244	$566,734	$450,893	$2,127,871
Granville	$821,767	$819,728	$415,920	$2,057,415
Sydney	$635,423	$928,775	$415,417	$1,979,615
Swansea	$674,550	$878,450	$402,394	$1,955,394
Burrinjuck	$792,925	$818,028	$254,030	$1,864,983
Albury	$717,140	$650,460	$288,515	$1,656,115
Maroubra	$468,219	$723,919	$340,915	$1,533,053
Londonderry	$352,440	$513,436	$222,417	$1,088,293
Lakemba	$414,459	$280,222	$182,218	$876,899
Heffron	$584,977	$0	$167,223	$752,200
Barwon	$533,189	$32,129	$54,088	$619,406
Vaucluse	$176,635	$80,068	$63,180	$319,883

Economic Contribution

Expenditure by Peak Organisations, Associations & Clubs	FNSW	NNSWF	TOTAL
Affiliation/ Registration Fees	$45,698,102	$10,657,644	$56,355,746
Kit & Clothing	$6,513,506	$1,568,235	$8,081,741
Administration	$18,047,319	$5,904,372	$23,951,691
Marketing	$4,068,115	$1,605,986	$5,674,101
Coaching, Ref, Medical and Player Payments	$26,518,731	$5,914,443	$32,433,174
Equipment and Grounds	$7,262,045	$1,617,978	$8,880,023
Trophies	$1,264,206	$248,768	$1,512,974
Events, Canteen and Presentations	$2,388,996	$237,005	$2,626,001
Other	$18,346,239	$5,628,336	$23,974,575
TOTAL	$130,107,259	$33,382,767	$163,490,026
Expenditure by Participants, Members, Spectators and Volunteers			
Participants	$114,640,508	$37,035,443	$151,675,951
Spectators, Members, and Volunteers	$20,352,197	$8,401,230	$28,753,428
TOTAL	$134,992,705	$45,436,673	$180,429,379
Business and Multiplier Indirect Expenditure			
Construction	$1,675,943	$374,238	$2,097,376
Retail Trade	$9,889,782	$2,447,964	$12,425,810
Accommodation and Food Service	$7,552,846	$3,390,610	$11,041,121
Transport	$9,527,722	$3,920,546	$13,553,794
Admin and Support	$3,969,090	$1,365,681	$5,416,383
Health Care	$5,522,095	$1,368,011	$7,066,306
Arts and Recreation	$19,778,958	$1,225,473	$21,963,775
TOTAL	$57,916,436	$14,092,523	$73,564,565
TOTAL ECONOMIC CONTRIBUTION	**$323,016,400**	**$92,911,963**	**$417,483,970**

Health Contribution

	FNSW	NNSWF	TOTAL
Physical health	$2,115,694	$406,164	$2,521,858
Mental Health	$1,615,568	$317,078	$1,932,646
TOTAL HEALTH CONTRIBUTION	**$3,731,262**	**$723,242**	**$4,454,504**

Total Economic and Health Contribution $421,938,474

Key inputs	
FNSW Participants	206,031
NNSWF Participants	46,639
Total Participants	252,670
Football Pitches in NSW	2,031
FNSW Clubs	724
NNSWF Clubs	250
Total Clubs	974

Key ratios	
Community Contribution per Pitch	$207,749
Community Contribution per Player	$1,670
Community Contribution per Club	$433,202
Players per Pitch	124
Community Contribution with additional 1 pitch per Club	$202,347,648
New Players with additional 1 pitch per Club	121,172

Disclaimer

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The work informing this study was undertaken between December 2014 and February 2015 and draws on primary field work and information collected from publicly available secondary sources during this time.

Due to rounding, numbers presented throughout this report may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures.

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THE COMMUNITY CONTRIBUTION OF FOOTBALL IN NSW