

# Economic Importance of Sport in Northern Ireland 2013



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# 1. Introduction

## 1.1 Terms of Reference

This report has been prepared by the Sport Industry Research Centre (SIRC) at Sheffield Hallam University on behalf of Sport Northern Ireland. The purpose of the report is to provide an estimate of the economic importance of sport in Northern Ireland in 2013, the year following the London Olympic Games, as well as to inform about its direct economic contribution.

## 1.2 Methodology

The SIRC model of economic impact assessment uses, as its basic input (where possible), economic variables from official statistics. Hence, with the sole exception of some parts of the Voluntary Sector and international or national trade, there is no need for collection of primary data. In the Voluntary Sport Sector the Survey of Sport Clubs can be used for a general illustration of the sector. National income accounting provides the framework for this model, which is consistent with the UK National Accounts. It allows for a division of the sports economy into the seven sectors below:

- 1. Consumer Sector** - including the personal or household sector. Shows mainly sport-related expenditure, e.g. spending on sports clothing and footwear.
- 2. Commercial Sport Sector** - including spectator sport clubs, sports good manufacturers, and retailers. In this sector we would classify companies such as Chain Reaction Cycles, Nike, and football clubs. We also include a section of the media where a sport product/service is produced such as sport TV, sport publications, etc.
- 3. Commercial Non-Sport Sector** - including suppliers for the production of sport-related goods and services. This sector includes all companies of the commercial sector that do not provide a sport product, but they assist through supply of inputs or revenue in its production. The size of these

inputs is determined by the National Accounts and the Annual Business Inquiry (ABI) survey. Examples include a beer company sponsoring a football club, or energy required for the operation of a Leisure Club, etc. The advertising revenue received by the club, represents a flow from the Commercial Non-Sport to the Commercial Sport Sector. Within Commercial Non-Sport two large sub-sectors are gambling and satellite TV; however, the largest part is the general unidentified component derived from the demand of inputs in the sports economy. Finally, following recommendations of a Pan-European effort for establishing a Sport Satellite Account, the sport-betting element is placed within the context of the general betting market in Northern Ireland and the UK.

- 4. Voluntary Sector** - including non-profit making sport organisations such as amateur clubs run by their participants. Professional football clubs are not included in this category, even if they are managed on a non-profit basis.
- 5. Local Government Sector** - including income from Local Government sport facilities, sport-related grants from the Central Government, and rates from the Commercial and Voluntary Sectors. The sector has expenses such as wages for labour (a flow towards the Consumers Sector) and grants to the Voluntary Sector.

**6. Central Government Sector** - including taxes, grants and wages on sport-related activities. For example, a person buying a ticket for a football match records two flows: one towards the Government sector as value added tax (VAT) and another towards the commercial sport sector for the remainder of the price.

**7. Outside the Area Sector** - including all transactions with economies outside the region. This sector has also been affected by the change of definition of bicycles, bringing almost the whole of the trade of Chain Reaction Cycles into play.

We record income and expenditure flows between the seven sectors above. As a result we can draw up a set of income and expenditure accounts for each sector. The 'double entry' accounting principle is applied, so every expenditure flow from sector A to sector B is also an income flow in the sector B accounts. The income and expenditure accounts are then used to derive estimates for the following economic impact indicators of the sport economy:

- Sport-related consumers' expenditure;
- Sport-related employment; and
- Sport-related value added.

Sport-related value added is the most comprehensive statistic of economic value as it corresponds to the gross value added (GVA) in the economy as a whole. It shows the contribution

of the sport industry to the regional economy. We measure it as the sum of wages and profit surplus in the sector, adjusted for the inclusion of value contributed from National Lottery projects.

The method used is consistent with the Office for National Statistics (ONS) estimate, as reported in the publication *Consumer Trends*<sup>1</sup>. The sport-generated product (GVA) as percentage of the total regional product is usually the most important statistic to consider.

Finally, this report introduces the EU accepted Vilnius sport definition, which affects some categories, most notably bicycles in terms of its treatment in past UK studies. For example, under the Vilnius methodology, the full section of bicycles purchased by adults (minus the ones designed explicitly for commuting) is included in the study, whilst before this was linked to sport usage derived from Travel Surveys.

<sup>1</sup> *Consumer Trends Quarter 1 2015 (ONS)*



## 2. The Sport Economy in Northern Ireland

### 2.1 Summary of Key Indicators

Table 2.1 summarises the most important sport-related indicators for Northern Ireland, namely Consumer expenditure, GVA and employment. The table also draws comparisons for the region, focusing on the years 2004, 2008 and 2013, and on the situation in England as a whole. The estimate for total consumption expenditure is consistent with the European System of Accounts 1995 and the EU adopted Vilnius definition of sport. The year 2008 coincides with the beginning of the greatest post-war recession in the UK

(and Europe) which had a negative influence on the sport market.

According to Table 2.1, over £932 million was spent on sport-related goods and services in Northern Ireland in 2013, accounting for 3.2% of total Consumer expenditure in the region. This compares favourably to the national average for England (2.4%, 2010 - SIRC estimate). Compared with 2008, there was an increase of 35% in sport-related consumption, associated with an Olympics related boost in the sport economy throughout Northern Ireland.



**Table 2.1: Main Sport-related Indicators for Northern Ireland\***

|  | 2004  | 2008  | 2013/10 |
|--|-------|-------|---------|
| Consumer expenditure on sport (£million) | 446.2 | 688.1 | 932.1   |
| Percentage of Northern Ireland total     | 2.8%  | 2.8%  | 3.2%    |
| National average (England)               | 2.4%  | 2.3%  |         |

|                                      |       |       |       |
|--------------------------------------|-------|-------|-------|
| Sport-related GVA (£million)         | 521.9 | 638.6 | 866.6 |
| Percentage of Northern Ireland total | 2.3%  | 2.3%  | 2.6%  |
| National average (England)           | 1.7%  | 1.5%  | 1.9%  |

|                                      |      |      |      |
|--------------------------------------|------|------|------|
| Sport-related employment (thousands) | 16.0 | 17.9 | 25.7 |
| Percentage of Northern Ireland total | 2.2% | 2.3% | 3.1% |
| National average (England)           | 1.8% | 1.8% | 2.3% |

\*English data are only available for GVA and employment for the year 2010.

The proportion of total Consumer expenditure on sport has also increased from 2.8% in 2008 to 3.2% in 2013. This however partly reflects a more inclusive definition in the bicycles market, whilst in past studies only a small fraction was included according to the sport use in the National Travel Survey. The revision is in accordance with the EU adopted practice. Sport-related economic activity in Northern Ireland adds close to £867 million, which represents an increase of 36% over the year 2008. The contribution to GVA by sport in the region has also grown from 2.3% in 2008 to 2.6% in 2013.

Sport-related employment in Northern Ireland grew from 17,900 in the year 2008 to 25,700 in 2013, partly reflecting the aforementioned change in definitions. As a percentage of total employment, it increased from 2.3% to 3.1% respectively. This compares to the situation in England where a 1.8% percentage of sport employment in 2008 increased to 2.3% influenced by the preparations of the Olympic Games.

Sport-related employment grew at a faster rate than sport value added. During the period 2008-2013, sport-related GVA and employment grew by 36% and 44% respectively. The gap

is explained in terms of the pressure applied upon wages in the recession of the intermediate period.

We can further consider the information in Table 2.2 which compares wages and expenditure in general, and the sections of clothing and footwear and gambling, which play an important role in the formation of sport-related spending. The figures in Table 2.2 are not sport-related; however they illustrate important and undisputable differences between Northern Ireland and the remaining UK nations serving as a background for understanding the sport economy.

**Table 2.2: Wages Against Expenditure, 2013**

|                  | Average weekly disposable income | Family weekly expenditure | Family weekly clothing and footwear expenditure | Family weekly gambling expenditure |
|------------------|----------------------------------|---------------------------|---|------------------------------------|
|                  | £                                | £                         | £   | £                                  |
| England          | 610                              | 505.4                     | 22.1  | 2.8                                |
| Scotland         | 564                              | 449.0                     | 23.0  | 3.1                                |
| Northern Ireland | 516                              | 484.7                     | 35.0  | 4.4                                |
| Wales            | 529                              | 438.8                     | 22.2  | 2.9                                |

Source: Family Spending - A report on the 2013 Living Costs and Food Survey, Table A35 (ONS)

In Table 2.2, Northern Ireland has the lowest position in terms of average wages per week; yet in terms of overall expenditure per week (categories 1-13 in Family Spending) it occupies the second position behind England. This implies that the recessionary impact of 2008-10 was much slower in arriving compared to the rest of the UK and that the domestic population continued spending at a much higher level achieving higher economic

growth. In England for example, according to Table 2.2, the average household spends 83% of disposable income compared with 94% in Northern Ireland. This important factor affects the way the sports economy behaves. Two categories where Northern Ireland has a clear advantage compared with the rest of the UK is clothing and footwear, and gambling, both very important in sport-related spending. The average

weekly household expenditure in Northern Ireland on clothing and footwear, and gambling is £35 and £4.4 correspondingly, compared with £22.1 and £2.8 in England, representing respective differences of 58% and 57%. This pattern of consumption gives an advantage to the national sports economy compared with the rest of the UK.



## 2.2. Consumer Expenditure

Table 2.3 summarises the value of sport-related expenditure in Northern Ireland. It shows that the total value of sport-related Consumer expenditure was £932 million in 2013, representing an increase of 35% over the year 2008 (in market prices). Based on Family Spending evidence, sport clothing and footwear is the largest category of Consumer spending on sport, accounting for £235 million or 25% of the market in 2013. Sport-related gambling is the second largest category accounting for £206

million or 22% of the market in 2013. Participation subscriptions and fees is the third largest category, accounting for £155 million. The smaller than average increase (8%) in sport-related participation subscription and fees expenditure during the period 2008-13 can be explained by the maturity of the sector and the effect of the economic recession following 2008. After participation, the most important category of expenditure is TV rental, cable and satellite subscriptions (£97 million).



**Table 2.3: Sport-related Consumer Expenditure in Northern Ireland**

|  | 2004       | 2008       | 2013       |
|--|------------|------------|------------|
|  | £m         | £m         | £m         |
| Sport clothing and footwear                  | 130        | 175        | 235        |
| Sports equipment and bicycles                | 31         | 56         | 63         |
| Participation subscriptions and fees         | 67         | 144        | 155        |
| Admissions to events                         | 15         | 22         | 23         |
| Sport-related gambling                       | 90         | 130        | 206        |
| TV rental, cable and satellite subscriptions | 39         | 71         | 97         |
| Other sport-related expenditure              | 75         | 90         | 153        |
| <b>Total</b>                                 | <b>446</b> | <b>688</b> | <b>932</b> |

According to Family Spending<sup>2</sup>, weekly household expenditure on 'participant sports' in Northern Ireland increased from £2.6 in 2004 to £2.9 in 2013, representing an increase of 12%. Other expenditure categories include publications, sport-related BBC licence fee, and sport travel.

Table 2.4 below, represents the pattern of Consumer spending in sport in constant 2013 prices. The total amount is based on the Consumer Price Index as derived from the database of Consumer Trends (ONS), while the individual sport categories are based on the sports indices of the publication

Sport Market Forecasts 2009-2013. The latter is using a selected filtering of official indicators to derive the aforementioned statistics. According to Table 2.4, during the period 2008-2013, sports-related Consumer spending increased in real terms by 21%. Significant increases over the same period occurred in sports clothing and footwear (43%) and in sports related gambling (30%). Further increases were recorded by sport equipment (5%) and other sport expenditure (44%). The sports clothing and footwear sector experienced a significant decline in the price index over the aforementioned ten-year period.



**Table 2.4: Sport-related Consumer Expenditure in Northern Ireland, Constant 2013 Prices**

|  | 2004       | 2008       | 2013       |
|--|------------|------------|------------|
|  | £m         | £m         | £m         |
| Sport clothing and footwear                  | 100        | 164        | 235        |
| Sports equipment                             | 32         | 60         | 63         |
| Participation subscriptions and fees         | 96         | 172        | 155        |
| Admissions to events                         | 22         | 26         | 23         |
| Sport-related gambling                       | 127        | 158        | 206        |
| TV rental, cable and satellite subscriptions | 52         | 84         | 97         |
| Other sport-related expenditure              | 104        | 106        | 153        |
| <b>Total</b>                                 | <b>534</b> | <b>770</b> | <b>932</b> |

<sup>2</sup> Family Spending - A Report on the 2013 Living Costs and Food Survey (ONS)



## 2.3 Sport-related Output

Estimates of sport-related output are based on value added by the sport sector. Value added is calculated as the sum of wages and profits generated in the sector. Table 2.5 summarises the value added by sport in Northern Ireland. According to Table 2.5, sport-related economic activity increased from £639 million in 2008 to £867 million in 2013. The largest part of this economic activity (£455 million, 52%) is generated by the Commercial Non-Sport Sector.

The Commercial Sport Sector is the second largest in terms of value added, generating £173 million (20% of total). Most of the valued added in this sector is attributable to spectator sports and retailing. The latter includes sport-related clothing and footwear, equipment and publications. The next sector in size is the Voluntary Sector (£131 million, 15%); followed by the Public Sector (£107 million, 12%).

**Table 2.5: Sport-related Value Added in Northern Ireland**

|                      | 2004       | 2008       | 2013         |
|----------------------|------------|------------|--------------|
| Sector               | £m         | £m         | £m           |
| Commercial Sport     | 112        | 120        | 173          |
| of which:            |            |            |              |
| Spectator sports     | 21         | 26         | 35           |
| Retailing            | 54         | 49         | 90.4         |
| Commercial Non-Sport | 244        | 326        | 455          |
| Voluntary            | 96         | 106        | 131          |
| Public               | 71         | 87         | 107          |
| <b>Total</b>         | <b>522</b> | <b>639</b> | <b>866.6</b> |

Within the Commercial Sport Sector, retailing increased from £49 million in 2008 to £90 million in 2013, reflecting the increasing trend for sports-wear to be used as fashion-wear and the full accounting of some global retailing companies such as Chain Reaction

Cycles, contributing significant amounts of profits and wages towards the national GVA. It is further consistent with evidence that the London Olympic Games have had an important impact on sport retailing and the health and fitness sectors in the UK.



## 2.4 Sport-related Employment

Table 2.6 provides estimates for sport-related employment in the Northern Ireland. The employment estimates for 2013 are based on wage payments and average salaries per sector. In general, employment is derived by dividing the sport-related wage bill by the average salary. Regional average weekly pay is provided by the Annual Survey of Hours and Earnings (ASHE).

Sport and associated industries are estimated to employ 25,700 people in Northern Ireland, accounting for 3.1% of all employment in the region in 2013. This represents an increase of 44% since the year 2008 study, but partly reflecting the full adoption of the Vilnius definition used in the EU.

**Table 2.6: Sport-related Employment in Northern Ireland**

|                      | 2004        | 2008        | 2013        |
|----------------------|-------------|-------------|-------------|
| Sector               | ('000)      | ('000)      | ('000)      |
| Commercial Sport     | 3.92        | 4.1         | 5.7         |
| of which:            |             |             |             |
| Spectator sports     | 0.9         | 1.3         | 1.6         |
| Retailing            | 1.67        | 1.4         | 2.6         |
| Commercial Non-Sport | 7.4         | 8.4         | 13.6        |
| Voluntary            | 1.9         | 2.2         | 2.5         |
| Public               | 2.7         | 3.3         | 3.9         |
| <b>Total</b>         | <b>16.0</b> | <b>17.9</b> | <b>25.7</b> |

As in the case of value added, the largest sector is Commercial Non-Sport, supporting 13,600 jobs or 53% of all sport-related employment in Northern Ireland. This is followed by the

Commercial Sport Sector, Public and Voluntary Sectors supporting 22%, 15% and 10% of the region's sport-related jobs respectively.





## 2.5 Summary of Income and Expenditure flows

Table 2.7 below summarises the income and expenditure flows for the seven sport-related sectors in 2013. The largest portion of income is generated in the Commercial Non-Sport Sector, accounting for £623 million. This is followed by the Commercial Sport Sector (£509 million) and the Consumer Sector (£437 million).

Within the Commercial Sport Sector, 69% of generated income comes from retailing. This consists mainly of sport equipment, clothing and footwear, and sales of sport-related books, magazines, newspapers, and DVDs.

**Table 2.7: Sport-related Income and Expenditure, 2013**

| Sector               | Income<br>£m | Expenditure<br>£m |
|----------------------|--------------|-------------------|
| Consumer             | 437          | 932               |
| Commercial Sport     | 509          | 488               |
| of which:            |              |                   |
| Spectator sports     | 53           | 51                |
| Participation sports | 21           | 20                |
| Retailing            | 352          | 327               |
| Voluntary            | 188          | 92                |
| Commercial Non-Sport | 623          | 577               |
| Central Government   | 361          | 127               |
| Local Government     | 173          | 177               |
| Outside the Area     | 299          | 166               |

\* Current factor expenditure (wages, other inputs)

On the expenditure side, by far the most important category is the Consumer Sector accounting for £932 million of expenditure. This is followed by the Commercial Non-Sport (£577 million) and Commercial Sport (£488 million) Sectors. Table

2.7 indicates that under the current economic structure, the Central Government generates more income (mainly out of taxes) than what it spends within the national economy on sport.



## 3. Comparisons with English Regions

Tables 3.1 to 3.3 compare Northern Ireland's sport statistics to the equivalent statistics of English Regions in the cases of Consumer Spending, GVA and Employment. As mentioned before, the sport-related expenditure in Northern Ireland is above the average English trend, with 3.2% of total Consumer expenditure in Northern Ireland being sport-related (compared to smaller percentages in English regions and overall). Tables 3.1 and 3.2 compare the Consumer spending and GVA patterns in 2008 prices to facilitate comparisons across time. Among the ten economies considered in Table 3.1, Northern Ireland is first in terms of absolute sport-related Consumer spending per capita and in terms of the share of sport in the overall spending. Important advantages that contribute towards this position include a disproportionate importance of Outdoor Recreation in Northern Ireland, with the associated greater spending per family on sport clothing and footwear (as confirmed by Family Spending), and a greater amount of spending (per family) on sport-related betting. It is important to emphasise that the recessionary pattern of English Regions in 2008

was not followed in the case of Northern Ireland. For example, the 2008 data from Family Spending indicates that the average spend per household per week was £490 in the case of Northern Ireland, compared to £465 for England, £417 for Wales, and £433 for Scotland<sup>3</sup>, making Northern Ireland one of the highest spending regions in the UK. What sets Northern Ireland apart as an economy is that on average a household spends 94% of the disposal income compared with 83% in England, generating much better prospects for growth of the sport economy.

Table 3.2 indicates that Northern Ireland is the first economy among the ten considered in terms of the share of sport-related GVA in the economy. This corresponds to 2.6% of its total output. The same order is reproduced in the case of employment in Table 3.3. In terms of sport-related employment out of total employment, at 3.1% Northern Ireland is the best performing economy out of the ten considered. This however does not take into account the progress that has been recorded in England as a whole following the peak of the economic crisis.



<sup>3</sup> Family Spending – A report on the 2008 Living Costs and Food Survey, Table A35 (ONS)



**Table 3.1: Summary of Sport-related Consumer Spending in Northern Ireland 2013 (2008 prices) and English Regions in 2008 (latest available regional data)**

|  | East    | East Midlands | London  |
|--|---------|---------------|---------|
|  | £m      | £m            | £m      |
| Sport clothing and footwear (£m)             | 429.6   | 293.0         | 633.0   |
| Sports goods (£m)                            | 155.6   | 118.2         | 229.2   |
| Participation subscriptions and fees (£m)    | 443.6   | 248.1         | 518.8   |
| Admissions to events (£m)                    | 82.1    | 45.9          | 96.1    |
| Sport-related gambling (£m)                  | 350.13  | 237.5         | 369.5   |
| Other sport-related spending (£m)            | 854.6   | 455.6         | 882.5   |
| Total Expenditure on Sport (£m)              | 2,315.6 | 1,398.4       | 2,729.1 |
| Per Capita Sport Spending (£)                | 404.2   | 315.5         | 358.1   |
| Proportion (%) of Total Consumer Expenditure | 2.6%    | 2.4%          | 2.1%    |

| North East | North West | South East | South West | West Midlands | Yorkshire & Humber | Northern Ireland |
|------------|------------|------------|------------|---------------|--------------------|------------------|
| £m         | £m         | £m         | £m         | £m            | £m                 | £m               |
| 164.9      | 417.6      | 520.2      | 347.6      | 441.4         | 290.6              | 250.7            |
| 44.3       | 133.9      | 137.0      | 115.7      | 100.6         | 81.0               | 57.9             |
| 126.1      | 379.0      | 524.2      | 396.2      | 279.6         | 258.9              | 129.0            |
| 23.4       | 70.2       | 97.1       | 73.4       | 51.8          | 47.9               | 19.3             |
| 214.6      | 350.2      | 385.8      | 278.0      | 610.7         | 303.7              | 168.5            |
| 255.2      | 710.1      | 904.2      | 600.6      | 651.9         | 553.0              | 224.3            |
| 828.5      | 2,060.9    | 2,568.4    | 1,811.6    | 2,135.9       | 1,535.2            | 849.7            |
| 321.7      | 299.7      | 306.5      | 347.8      | 394.7         | 294.5              | 455.3            |
| 2.6%       | 2.2%       | 1.9%       | 2.3%       | 2.9%          | 2.2%               | 3.2%             |

**Table 3.2: Summary of Sport-related Output in Northern Ireland 2013 (2008 prices) and English Regions in 2008 (latest available regional data)**

|                                       | East    | East Midlands | London  |
|---------------------------------------|---------|---------------|---------|
| Sector                                | £m      | £m            | £m      |
| Commercial Sport                      | 664.9   | 358.8         | 740.3   |
| of which:                             |         |               |         |
| Spectator sports                      | 83.9    | 66.8          | 178.7   |
| Participation sports                  | 67.4    | 31.5          | 121.9   |
| Retailing                             | 215.7   | 112.6         | 282.1   |
| Manufacturing                         | 77.2    | 46.2          | 75.6    |
| TV and Radio                          | 34.6    | 27.0          | 81.2    |
| Commercial Non-Sport                  | 1,085.6 | 705.8         | 1,294.8 |
| Voluntary                             | 302.6   | 160.7         | 333.4   |
| Public                                | 187.4   | 150.1         | 222.1   |
| Total Sport-related Economic Activity | 2,240.5 | 1,375.3       | 2,590.5 |
| Sport GVA as % of Total GVA           | 2.0%    | 1.7%          | 1.0%    |

| North East | North West | South East | South West | West Midlands | Yorkshire & Humber | Northern Ireland |
|------------|------------|------------|------------|---------------|--------------------|------------------|
| £m         | £m         | £m         | £m         | £m            | £m                 | £m               |
| 190.9      | 496.0      | 752.0      | 344.2      | 470.1         | 309.8              | 151.6            |
| 73.7       | 187.2      | 135.5      | 75.64      | 90.0          | 55.7               | 29.2             |
| 15.4       | 55.9       | 80.6       | 60.43      | 43.7          | 26.3               | 9.7              |
| 60.3       | 149.6      | 194.6      | 135.82     | 180.6         | 136.7              | 80.8             |
| 24.7       | 58.9       | 65.8       | 39.5       | 54.9          | 58.5               | 2                |
| 15.9       | 42.6       | 50.0       | 32.3       | 32.4          | 31.6               | 7.7              |
| 444.7      | 1,085.5    | 1,273.4    | 858.1      | 1,115.2       | 772.5              | 406.9            |
| 91.6       | 247.7      | 332.4      | 260.6      | 214.4         | 166.5              | 117.0            |
| 90.6       | 253.0      | 233.9      | 143.1      | 139.9         | 175.6              | 95.7             |
| 817.8      | 2,082.3    | 2,591.6    | 1,606.0    | 1,939.6       | 1,424.5            | 771.2            |
| 2.0%       | 1.7%       | 1.4%       | 1.6%       | 2.0%          | 1.6%               | 2.6%             |

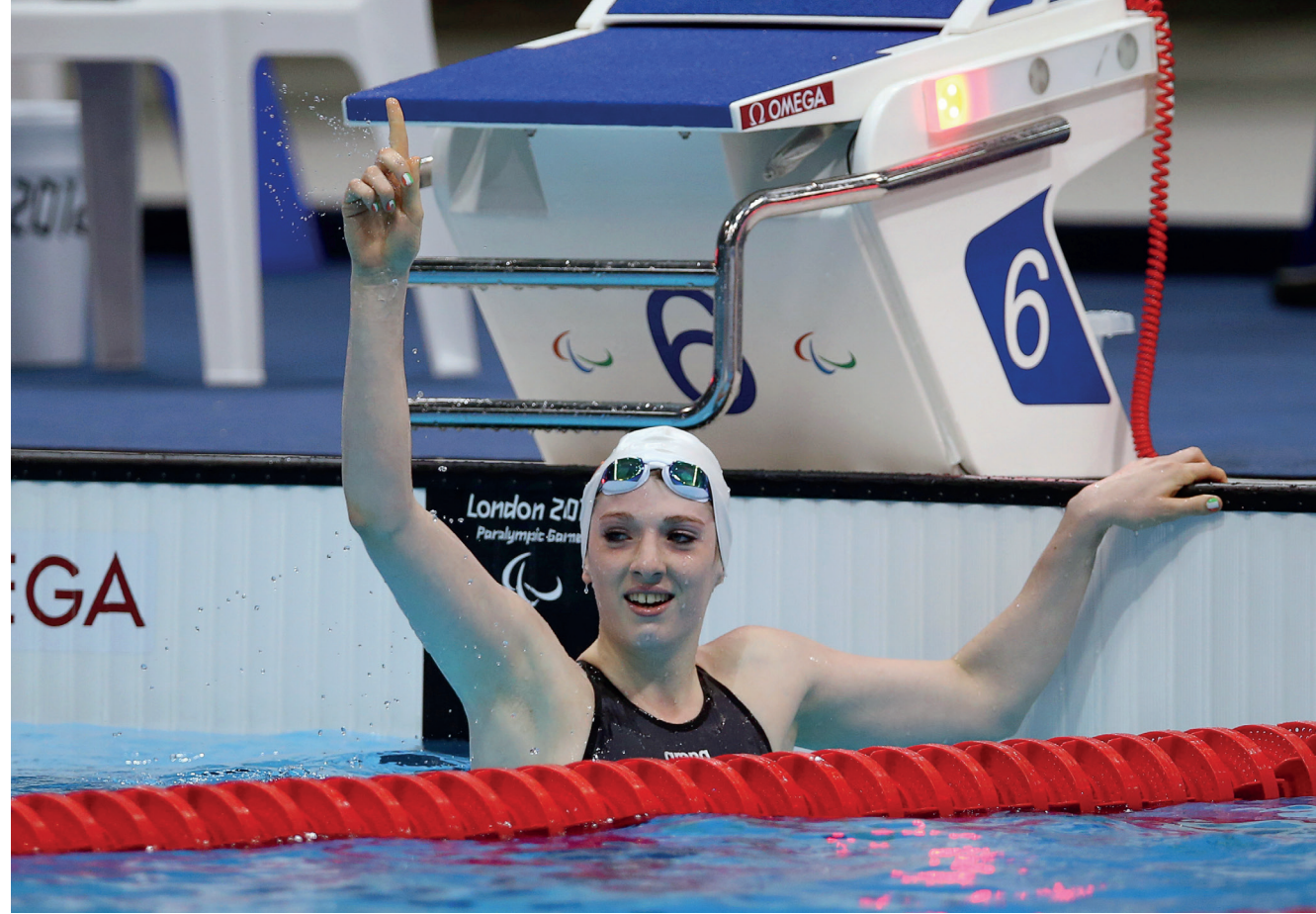


**Table 3.3: Summary of Sport-related Employment in Northern Ireland 2013 and English Regions in 2008**  
(latest available regional data)

|  | East        | East Midlands | London      |
|--|-------------|---------------|-------------|
| Sector   | ('000)      | ('000)        | ('000)      |
| Commercial Sport                                 | 25.2        | 12.5          | 20.9        |
| of which:  |             |               |             |
| Spectator sports                                 | 3.9         | 2.9           | 5.5         |
| Participation sports                             | 3.0         | 1.3           | 3.6         |
| Retailing  | 6.5         | 3.4           | 8.6         |
| Manufacturing                                    | 2.3         | 1.0           | 1.5         |
| TV and Radio                                     | 0.8         | 0.8           | 1.7         |
| Commercial Non-Sport                             | 23.8        | 16.5          | 20.7        |
| Voluntary  | 6.2         | 3.4           | 4.9         |
| Public   | 6.8         | 5.4           | 6.3         |
| <b>Total Jobs in Sport</b>                       | <b>62.1</b> | <b>37.9</b>   | <b>52.8</b> |
| <b>Sport Employment as % of Total Employment</b> | <b>2.2%</b> | <b>1.8%</b>   | <b>1.4%</b> |

|  | North East  | North West  | South East  | South West  | West Midlands | Yorkshire & Humber | Northern Ireland |
|--|-------------|-------------|-------------|-------------|---------------|--------------------|------------------|
|  | ('000)      | ('000)      | ('000)      | ('000)      | ('000)        | ('000)             | ('000)           |
|  | 7.2         | 18.8        | 25.5        | 12.7        | 18.1          | 9.8                | 5.7              |
|  | 3.7         | 9.0         | 5.9         | 3.7         | 4.2           | 2.9                | 1.6              |
|  | 0.7         | 2.5         | 3.3         | 2.8         | 1.9           | 1.3                | 0.5              |
|  | 1.8         | 4.5         | 5.8         | 4.1         | 5.4           | 4.0                | 2.6              |
|  | 0.6         | 1.6         | 1.3         | 0.9         | 1.8           | 0.5                | 0.7              |
|  | 0.5         | 1.2         | 1.2         | 1.2         | 1.2           | 1.2                | 0.3              |
|  | 11.1        | 25.3        | 26.0        | 20.1        | 26.1          | 18.5               | 13.6             |
|  | 2.2         | 5.8         | 7.0         | 5.7         | 4.9           | 4.5                | 2.5              |
|  | 3.4         | 9.7         | 8.1         | 5.5         | 5.1           | 7.0                | 4.0              |
|  | <b>24.0</b> | <b>59.5</b> | <b>66.7</b> | <b>44.0</b> | <b>54.2</b>   | <b>39.8</b>        | <b>25.7</b>      |
|  | <b>2.1%</b> | <b>1.9%</b> | <b>1.6%</b> | <b>1.7%</b> | <b>2.2%</b>   | <b>1.6%</b>        | <b>3.1%</b>      |





## Appendices



# Appendix 1: Statistical Sources

Sources of data used in the model include the following publications:

- Consumer Trends
- Travel Trends
- Family Spending
- Regional Trends
- Annual Business Inquiry
- Annual Survey of Hours and Earnings
- Regional Accounts
- Leisure and Recreation Statistics
- Sports Northern Ireland Annual Report and Accounts
- Department of Culture, Arts and Leisure Resources and Accounts
- Housing and Construction Statistics
- National Accounts
- BBC Annual Report and Accounts
- UK Markets
- HM Customs and Excise Report
- Monthly Digest of Statistics
- Financial Statement and Budget Report
- Horserace and Betting Levy Board Report
- Government's Expenditure Plans
- BSkyB Annual Report
- National Travel Survey
- Labour Trends

# Appendix 2: Definitions

## 1. National Income Accounting

The concepts of National Income Accounting were developed for macro-economic analysis in the 1930s and 1940s. The basic principle is that there is accounting equality between total output, total income and total expenditure. The most common definitions of total output in the economy as a whole are the Gross Domestic Product and GVA. For example, assume that the total output in a factory producing football shoes is £100m. This is equivalent to the income generated as wages (say £60m) as profits (say 10m) and as flow to the companies selling inputs (£30m) required in the production. Further, total income will also be identical to total expenditure because output that is not sold in the current financial year is treated as investment expenditure.

## 2. Gross Value Added (GVA)

GVA (based on wages and profits) is the difference between total income and the cost of inputs used in the production process (raw materials and services). Alternatively it can be expressed as:

$$\text{GVA} = \text{GDP} - \text{taxes on products} + \text{subsidies on products.}$$

GVA shows the contribution of the sports sector to the economy as a whole.

## 3. Sport

We follow the definition employed in the publication Sport Market Forecasts. Sport is divided into the following sectors: sport clothing and footwear; sport equipment; health and fitness; other participant sports; boats; spectator sports; sport gambling; sport TV and video; sport-related publications; and sport-related travel.

## 4. Employment

This is full-time equivalent (FTE) jobs. In this case two half-time jobs are measured as one full-time equivalent.



## Appendix 3: Sources and Methods

This section attempts to explain how the estimates are derived. Many are generated through the flows in the model. The flows among the sectors in the SIRC model are based on a double entry principle between income and expenditure. Data sources mostly relate to the expenditure side, especially in the case of Consumers. The 'Outside the Area' Sector is treated as residual in the flow system. No current data exists to adequately describe the Voluntary Sector; for this reason we use relationships that arise from previous studies and surveys to relate the Voluntary Sector to the sport economy. The estimation of the remaining five sectors is explained below:

### 1. Consumer Expenditure

Many items of sport-related Consumer expenditure are located in the Family Expenditure Survey (FES) at the UK level. Only broader categories of spending exist for UK regions. The latter are used to extract the relative statistics from the UK figures in a proportionate manner.

**Admissions:** They are estimated from Family Spending. Data exists for 'spectator sports admission charges' for the UK as a whole and for 'sports admissions and subscriptions' for the regions. Our estimate comes directly from the database deposited in the Essex Archives (because of the special circumstances of the recession).

**Sports goods:** Expenditure is estimated using the Family Spending category 'sports and camping

equipment', and annual reports of major sports companies.

**Bicycles:** The basis of the estimate comes from Consumer Trends. This is filtered regionally according to Family Spending.

**Boats:** The estimate is derived from a SIRC model for the sector based on statistics from the British Marine Federation.

**Participant sports subscriptions and fees:** Expenditure is estimated using the Family Spending categories: 'participant sports excluding subscriptions' and 'subscriptions to sports and social clubs'.

**Clothing and footwear sales:** The estimate is based on a SIRC model, annual reports from sports companies, and statistics from Consumer Trends and Family Spending. In general, where possible, we assume that sports clothing and footwear are consumed in the same proportions (out of total clothing and footwear) as in the UK imports statistics. This gives a very accurate estimation in the case of footwear.

**Sport-related travel:** This is derived from a SIRC model based on National Travel Survey statistics.

**Books, magazines and newspapers:** Statistics are based on Family Spending and Consumer Trends. The sport share is derived according to the sport content in publications.

**Video and DVDs purchase and rental:** Based on statistics from Family Spending and the British Video Association.

**BBC licence:** Expenditure is derived from the sport-related content of the BBC licence. It is based on data from the BBC Annual Report, a SIRC model and the number of households.

**TV rental, cable and satellite subscriptions:** The basic estimate is derived from Family Spending. A basic sport-related estimate is filtered by using BSkyB and BBC statistics on the basis of programming expenditure.

**Sport-related gambling:** The basis of the estimates is the UK figure, which is derived from official HM Customs and Excise data. A model by SIRC is used to ensure that the value of the overall gambling sector corresponds to the Consumer Trends statistics. Subsequently the regional element is derived by using Family Spending weights and the population estimates. The overall gambling spending is not taken from Family Spending. The derived figures relate to net gambling. We do not double count winnings. For example, according to our methodology, in 2008, total gambling in the UK was £9.9bn. In the same year, just the stakes in general betting approached £38bn.

### 2. Commercial Sport

#### Income

**Spectator club admissions:** This is a flow of income coming from the domestic Consumer Sector and the overseas visitors to Northern Ireland. Data from FES and HM Customs and Excise have been used. Income from Tourists is estimated from Travel Trends and the Digest of Tourist Statistics.

**Sponsorship:** Most of this income comes from the Commercial Non-Sport Sector. Various sources are used from the SIRC archive. We also assume that the sponsorship market is associated with the size of the spectator sports industry.

**Horserace betting levy:** These statistics are calculated using data from the Horserace Betting Levy Board Annual Report and population statistics from Population Trends.

**Cost of the rights to top league matches:** The basic estimate is derived from BSkyB statistics.

**Subscriptions and fees:** This is derived from the income and expenditure flows in the model.

**Retailing:** Income from retailing is associated with Consumer expenditure on sport-related equipment, clothing, footwear, books, newspapers, magazines, and DVDs. A part of this expenditure is flowing towards local authorities, while VAT is going to the Central Government.

**Exports:** Income from exports is estimated using trade assumptions

based on Input-Output tables for wider (than sport) sections of the economy. These ratios are applied on the sport-related Consumer spending.

**TV and radio:** Income in the case of BBC comes directly from the license fee. Only the sports-related part is considered.

#### Expenditure

**Wages:** The calculation of wages is based on the flow of income to the sector and estimated statistics (on the basis of the old Business Monitors and the Annual Business Inquiry) that relate wages to total income. This method of calculating wages is repeated in all sectors at a UK regional level.

**Other inputs:** In the case of spectator and participation clubs an estimation of profits is required. Then 'other inputs' is the residual income after profits and wages have been accounted for. In the case of retailers, 'other inputs' can be estimated directly through statistics from the Input-Output tables and the ABI at a UK regional level.

**Investment:** In a similar way investment is estimated as a ratio of the generated value added in each sub-sector. We do some assumptions so that we end up with the best possible estimates given the existing information. For example, the share of investment out of value added in the sport retailing sector is assumed to be the same as in the retailing sector as a whole.

### 3. Commercial Non-Sport

#### Income

**Income coming from consumer spending (net of tax):** This is determined according to the flows of Consumer expenditure. For example, in the case of gambling, Consumer spending is directed towards the Government as taxes and towards the Commercial Non-Sport Sector as income.

**Sales of current inputs to other sectors:** These are determined again from the flows of the model. For example, sales to the Commercial Sport Sector are identified from a part of the Commercial Sport spending. The latter is directed either to the Commercial Non-Sport or Out of Area Sectors. This distribution is determined from the Input-Output tables.

**Sales of capital inputs to other sectors:** They are related to the capital expenditure of the Local Government, and Commercial and Voluntary Sectors.

#### Expenditure

**Wages:** Spending on wages is calculated as a percentage of total income accruing to the sector. This income can be expressed as wages, profits, or imports (before tax and investment decisions). The part of turnover directed towards wages can be estimated from a SIRC model based on Input-Output tables and the ABI.

**Imports:** They are estimated using the same method as above (wages).



## Appendix 3: (continued...)

**Corporation tax:** It is derived from the profits accruing to the sector (factor surplus, estimated as above) and the tax rate, estimated from the National Accounts (Blue Book).

**Rates:** The estimate is based on the value added generated in the sector and a model estimating rates as a percentage of value added for the two commercial sectors.

**Sponsorship and advertising:** They are estimated using non-official statistics and a SIRC model.

**Lottery Awards:** They are estimated using data from Department of Culture, Media and Sport (DCMS) and the Lottery Fund Accounts of Sport Northern Ireland.

### 4. Local Government

#### Income

**Fees and charges:** The estimates are based on the Local Government Financial Statistics and on a SIRC model for the sector.

**Sales of equipment:** This is derived from a part of Consumer spending on sport equipment above.

**Grants from Central Government:** Using the HM Treasury Budget Report, an estimate of grants from Central Government as a percentage of Local Authority receipts is derived. This is then applied to Local Government expenditure categories.

**Rates:** This is tax income received from the Voluntary, Commercial Sport and Commercial Non-Sport Sectors.

The estimates are derived from the flows of the SIRC model.

#### Expenditure

Total expenditure on sport services: This is derived from the Local Government Financial Statistics and a SIRC model for processing the data. This is then distributed into wages and other inputs.

**Education:** Spending on education is derived from the Blue Book and the Government's Expenditure Plans (Department of Education Services).

**Capital expenditure:** This is based on statistics from the Blue Book (Table 5.3.7).

### 5. Central Government

#### Income

Income accruing to the Central Government is mainly in the form of taxation. These estimates are determined from the tax rates and the flows within the SIRC model.

#### Expenditure

**Grants via Sports Council:** Data is provided by the Sports Council's Annual Accounts.

**Wages:** Estimates are provided from the Sport Council's Annual Accounts.

**Support for Local Government expenditure:** It is determined in the Local Government income below.

## Appendix 4: Model Output

### Consumer Expenditure on Sport-Related Goods and Services, 2013

|  | £million     |
|--|--------------|
| Admissions   | 23.1         |
| Sports goods   | 38.5         |
| Bicycles   | 23.9         |
| Boats  | 23.3         |
| Participants sports subscriptions and fees             | 154.7        |
| Clothing sales   | 149.3        |
| Footwear sales   | 86.0         |
| Repairs and laundry                                    | 1.8          |
| Travel   | 78.6         |
| Books and magazines                                    | 4.5          |
| Newspapers   | 13.6         |
| Video: purchase and rental                             | 0.5          |
| BBC licence  | 8.8          |
| TV and video rental, cable and satellite subscriptions | 97.0         |
| Internet subscriptions                                 | 2.1          |
| Skiing holidays  | 18.7         |
| Public schools   | 2.0          |
| Gambling: football pools                               | 6.0          |
| Horse racing   | 180.7        |
| Raffles and gaming                                     | 19.0         |
| <b>Total</b>   | <b>932.1</b> |



## Appendix 4: (continued...)

### Commercial Sport Income, 2013

|  | £million     |
|--|--------------|
| <b>Spectator Clubs:</b>                  |              |
| Admissions                               | 21.8         |
| Sponsorship and advertising              | 11.3         |
| Corporate entertainment                  | 5.0          |
| Horserace betting levy                   | 2.2          |
| Cost of the rights to top league matches | 9.5          |
| <b>Participation Clubs:</b>              |              |
| Subscriptions and fees                   | 21.2         |
| <b>Retailers (net of Vat):</b>           |              |
| Equipment                                | 125.9        |
| Clothing and footwear                    | 207.6        |
| Books, newspapers, magazines and videos  | 18.5         |
| <b>Exports and Manufacturers' Sales:</b> |              |
| Clothing, footwear and equipment         | 61.0         |
| <b>TV and Radio:</b>                     |              |
| BBC                                      | 8.8          |
| Commercial                               | 8.8          |
| Exports                                  | 1.5          |
| Internet subscriptions                   | 1.8          |
| Lottery Awards                           | 0.8          |
| Lottery Partnerships                     | 0.3          |
| <b>Total Income</b>                      | <b>505.9</b> |

### Commercial Sport Expenditure, 2013

|   | £million     |
|---|--------------|
| <b>Current Factor Expenditure</b>       |              |
| Spectator clubs:                        |              |
| Wages                                   | 33.7         |
| Other inputs                            | 16.9         |
| Participation:                          |              |
| Wages                                   | 10.6         |
| Other inputs                            | 9.5          |
| Retailers:                              |              |
| Wages                                   | 65.3         |
| Other inputs                            | 261.6        |
| Manufacturers:                          |              |
| Wages                                   | 13.0         |
| Other inputs                            | 33.9         |
| TV and Radio:                           |              |
| Wages                                   | 8.6          |
| Other inputs                            | 5.6          |
| <b>Total Factor Expenditure</b>         |              |
| Total wages                             | 131.3        |
| Total other inputs                      | 327.6        |
| Total factor surplus                    | 41.6         |
| Total value added                       | 172.9        |
| <b>Current Transfers</b>                |              |
| Corporation tax                         | 4.3          |
| Rates                                   | 5.2          |
| <b>Capital Expenditure</b>              |              |
| Investment                              | 19.9         |
| <b>Total Expenditure Leaving Sector</b> | <b>488.2</b> |

## Appendix 4: (continued...)

### Voluntary Sector Income, 2013

|   | £million     |
|---|--------------|
| <b>Factor Income (monetary)</b>                       |              |
| Players' subscriptions and match fees                 | 86.6         |
| Equipment   | 0.4          |
| Sponsorship and advertising                           | 7.7          |
| Raffles and gaming machines                           | 19.0         |
| Bar receipts  | 113.7        |
| Subtotal (factor income)                              | 227.5        |
| <b>Other Monetary Income</b>                          |              |
| Grants  | 18.5         |
| Employers' subsidies                                  | 12.8         |
| Interest  | 3.2          |
| Lottery Awards  | 3.2          |
| Lottery Partnerships                                  | 2.8          |
| <b>Total Monetary Income (excluding bar receipts)</b> | <b>154.3</b> |

### Voluntary Sector Expenditure, 2013

|   | £million    |
|---|-------------|
| <b>Factor Expenditure</b>                                   |             |
| Wages   | 60.3        |
| Ground hire and rents                                       | 9.3         |
| Equipment   | 0.2         |
| Other   | 9.5         |
| (Bar purchases)   | 79.6        |
| Subtotal (factor expenditure)                               | 158.9       |
| Rates   | 4.5         |
| Interest  | 0.6         |
| Investment  | 7.5         |
| <b>Total Monetary Expenditure (excluding bar purchases)</b> | <b>91.9</b> |



## Appendix 4: (continued...)

### Commercial Non-Sport Income, 2013

|  | £million     |
|--|--------------|
| Receipts Net of Tax from Consumer Spending:                    |              |
| Travel   | 30.2         |
| Gambling   | 168.4        |
| Skiing   | 8.2          |
| Public schools   | 1.6          |
| TV rental, cable and satellite subscriptions                   | 77.6         |
| Sales of Current Inputs to:                                    |              |
| Central Government Sector                                      | 15.8         |
| Local Government Sector  | 33.0         |
| Commercial Sport Sector  | 235.8        |
| Voluntary Sector   | 12.3         |
| Interest from Voluntary Sector                                 | 0.6          |
| Sales of Capital Inputs to:                                    |              |
| Local Government Sector  | 21.8         |
| Commercial Sport Sector  | 11.9         |
| Voluntary Sector   | 6.0          |
| Promotion Expenditure for Sponsorship<br>(intra-sectoral flow) | 26.6         |
| <b>Total Income</b>  | <b>623.2</b> |

### Commercial Non-Sport Expenditure, 2013

|  | £million     |
|--|--------------|
| Producers of Inputs to Sport:  |              |
| Wages  | 290.2        |
| Imports  | 173.9        |
| (factor surplus)   | 165.1        |
| (value added)  | 455.3        |
| Corporation tax  | 16.9         |
| Rates  | 13.7         |
| Purchases of Inputs from Sport:  |              |
| Sponsorship and advertising  | 30.1         |
| TV and radio advertising   | 8.8          |
| Corporate entertainment at sports events                               | 5.0          |
| Employees' sports subsidies  | 3.8          |
| Horserace betting levy   | 2.2          |
| Interest payments to Voluntary Sector                                  | 3.2          |
| Promotion Expenditure for Sponsorship:<br>(to elsewhere in CNS sector) | 26.6         |
| Cost of the rights to top league matches                               | 9.5          |
| Lottery Awards   | 9.2          |
| Lottery Partnerships   | 10.8         |
| <b>Total Expenditure Leaving Sector</b>                                | <b>577.3</b> |

## Appendix 4: (continued...)

### Central Government Income, 2013

|                             | £million     |
|-----------------------------|--------------|
| Taxes:                      |              |
| Expenditure                 | 172.7        |
| Incomes generated in:       |              |
| Commercial Sport Sector     | 41.0         |
| Voluntary Sector            | 16.7         |
| Commercial Non-Sport Sector | 101.5        |
| Local Government Sector     | 26.5         |
| Factor Income (excl VAT):   |              |
| Rail receipts               | 2.35         |
| <b>Total income</b>         | <b>360.7</b> |

### Central Government Expenditure, 2013

|  | £million     |
|--|--------------|
| <b>Transfer Payments</b>                           |              |
| Grants via Sports Councils                         | 12.8         |
| Grant Support for Local Government Expenditure on: |              |
| Sport (net spending)                               | 52.2         |
| Education  | 28.7         |
| Foundation for Sport and Arts                      | 0.0          |
| Football Trust                                     | 0.0          |
| Subsidy to CG employees                            | 9.0          |
| <b>Factor Expenditure</b>                          |              |
| Sports Council: wages and other inputs             | 20.0         |
| Rail: wages and other inputs                       | 1.8          |
| Other wages and inputs                             | 2.3          |
| <b>Total</b>                                       | <b>126.6</b> |



## Appendix 4: (continued...)

### Local Government Income, 2013

|                                    | £million     |
|------------------------------------|--------------|
| Local Authority Sports Facilities: |              |
| Fees and charges                   | 33.3         |
| Sales of equipment                 | 17.2         |
| Ground hire                        | 4.7          |
| Grants from Central Government:    |              |
| Fund net expenditure on sport      | 52.2         |
| Sport education                    | 28.7         |
| Via Sports Council                 | 1.9          |
| Rates:                             |              |
| Voluntary Sector                   | 4.5          |
| Commercial Sport Sector            | 5.2          |
| Commercial Non-Sport Sector        | 13.7         |
| Payments for policing              | 0.6          |
| Lottery Awards                     | 3.8          |
| Lottery Partnerships               | 6.9          |
| <b>Total income</b>                | <b>172.5</b> |

### Local Government Expenditure, 2013

|                               | £million     |
|-------------------------------|--------------|
| Current Expenditure           |              |
| Direct gross expenditure:     |              |
| Wages                         | 54.8         |
| Other current expenditure     | 46.6         |
| Education:                    |              |
| Wages                         | 29.9         |
| Research                      | 0.3          |
| Local Transport and Policing: |              |
| Wages and other inputs        | 11.0         |
| Grants to voluntary clubs     | 7.6          |
| Capital Expenditure           |              |
| Investment                    | 27.2         |
| <b>Total Expenditure</b>      | <b>177.4</b> |

## Appendix 4: (continued...)

### Outside the Area Income, 2013

|  | £million     |
|--|--------------|
| Sports, clothing, footwear and equipment | 96.1         |
| Import content of skiing                 | 6.7          |
| TV imports                               | 1.6          |
| Prize income                             | 7.2          |
| Import Content of UK Production of:      |              |
| Sport-related goods and services         | 13.4         |
| Commercial Non-Sport Sector output       | 173.9        |
| <b>Total Income</b>                      | <b>298.9</b> |

### Outside the Area Expenditure, 2013

|  | £million     |
|--|--------------|
| Sports, clothing, footwear and equipment | 153.3        |
| Admissions to sports events              | 4.1          |
| TV exports                               | 1.5          |
| Prize income                             | 7.2          |
| <b>Total Expenditure</b>                 | <b>166.2</b> |

### Value Added by Sport-related Economic Activity, 2013

|                                | £million     | Index        |
|--------------------------------|--------------|--------------|
| Sector                         |              |              |
| Commercial Sport:              |              |              |
| Wages                          | 131.3        |              |
| Surplus                        | 41.6         |              |
| Lottery projects               | 0.4          |              |
| <b>Total</b>                   | <b>173.3</b> | <b>20.0</b>  |
| Voluntary:                     |              |              |
| Wages                          | 60.3         |              |
| Surplus                        | 68.6         |              |
| Lottery projects               | 2.1          |              |
| <b>Total</b>                   | <b>130.9</b> | <b>15.1</b>  |
| Commercial Non-Sport:          |              |              |
| Wages                          | 290.2        |              |
| Surplus                        | 165.1        |              |
| <b>Total</b>                   | <b>455.3</b> | <b>52.5</b>  |
| Central Government:            |              |              |
| Wages                          | 7.0          |              |
| Lottery projects               | 0.8          |              |
| <b>Total</b>                   | <b>7.8</b>   | <b>0.9</b>   |
| Local Government:              |              |              |
| Wages (education)              | 29.9         |              |
| Wages (sports facilities)      | 54.8         |              |
| Wages (transport and policing) | 11.0         |              |
| Lottery projects               | 3.7          |              |
| <b>Total</b>                   | <b>99.3</b>  | <b>11.5</b>  |
| <b>Total Value Added</b>       | <b>866.6</b> | <b>100.0</b> |



## Appendix 4: (continued...)

### Employment, 2013

|                             | Employment<br>('000s) |
|-----------------------------|-----------------------|
| <b>Sector</b>               |                       |
| <b>Commercial Sport:</b>    |                       |
| Spectator clubs             | 1.6                   |
| Participation clubs         | 0.5                   |
| Retailers                   | 2.6                   |
| Manufacturing (exports)     | 0.7                   |
| TV and Radio                | 0.3                   |
| Subtotal                    | 5.7                   |
| <b>Voluntary Sector:</b>    | 2.5                   |
| <b>Commercial Non-Sport</b> | 13.6                  |
| <b>Central Government:</b>  |                       |
| Administration              | 0.2                   |
| <b>Local Government:</b>    |                       |
| Sports facilities           | 2.6                   |
| Education                   | 0.9                   |
| Transport and policing      | 0.3                   |
| Subtotal                    | 3.8                   |
| <b>Total</b>                | <b>25.7</b>           |

### The Expenditure Flows Matrix, 2013 (£m)

|                             | CON   | CS    | VOL   | CNS   | CG    | LG   | OV    |
|-----------------------------|-------|-------|-------|-------|-------|------|-------|
| Consumer Sector             | 0.0   | 304.2 | 106.0 | 286.1 | 152.3 | 50.5 | 29.9  |
| Commercial Sport Sector     | 95.0  | 0.0   | 0.0   | 247.7 | 44.6  | 5.8  | 95.2  |
| Voluntary Sector            | 43.6  | 0.2   | 0.0   | 18.9  | 20.1  | 9.2  | 0.0   |
| Commercial Non-Sport Sector | 215.3 | 41.4  | 20.8  | 0.0   | 101.5 | 24.3 | 173.9 |
| Central Government Sector   | 7.0   | 1.2   | 19.8  | 15.8  | 0.0   | 82.8 | 0.0   |
| Local Government Sector     | 69.3  | 4.3   | 7.6   | 54.8  | 41.3  | 0.0  | 0.0   |
| Outside the Area Sector     | 7.2   | 158.1 | 0.0   | 0.0   | 0.8   | 0.0  | 0.0   |

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