



# Munster Council G.A.A. Return on Coaching Investment





# Munster Council G.A.A. Return on Coaching Investment

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## RESEARCH SUMMARY AT A GLANCE





# Munster Council G.A.A. Return on Coaching Investment

## RESEARCH SUMMARY AT A GLANCE

### Munster GAA Coaching Performance Summary

- 58,538 underage players are registered with 422 juvenile clubs operating across the six Munster counties
- There was a total of 10,300 mentors and coaches engaged with underage GAA clubs across the province in 2019.
- Every euro invested in juvenile coaching by Munster GAA in 2019 yielded a return of €16.81 compared to €15.27 in 2015.
- The Munster GAA investment of €1.77 million into provincial coaching supports and structures in 2015 generated a return on investment of €29.7 million.
- The total player time generated by Munster GAA clubs in underage games and training was 2.15 million hours representing the cumulative time spent by all underage players attending training sessions and games in 2019.
- Parents are receiving a €9.61 return on investment for every euro they spend on their children's GAA membership based on the health, social and sports benefits they receive for their children. This represents an increase from the 2015 value of €9.15.
- Over 2,880 weekly underage training sessions are held across the province during the playing season generating 3,900 hours of G.A.A. coaching time for underage players each week.
- 37% of clubs in the province have experienced growth in the playing numbers while 37% of clubs have retained the same playing numbers over the past three years.
- Over 26% of clubs in the province have witnessed a decline in their playing numbers in the past three years.
- 39% of clubs stated that they have an above average level of difficulty in attracting mentors to get involved in coaching with the club.
- 48,990 underage players participated in Munster GAA Cul Camps hosted in 2019 across the province an increase of 50.5% on 2015.
- The 2019 playing numbers per age group are as follows;

Age Grade	No. of Players 2019	No. of Players 2015
Under 8	14,060	13,434
Under 10	10,416	10,129
Under 12	10,478	10,691
Under 14	9,059	9,898
Under 16	7,800	8,852
Under 18	6,725	7,784



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- A total of 862,456 player contact hours are generated by Munster GAA coaches through the Go Games coaching programme in primary schools generating a value of €6.598 million.
- The value of total schools activity between schools Go Games and Blitzes across hurling and football is €11.572 million accounting for 1.51 million hours of Gaelic Games contact in the province.
- The lifetime value an underage player receives from GAA activity is valued at €4,150.80, based on a player participating from under 8 to minor. The 2015 lifetime value of a player was estimated at €3,542.96 representing an increase of 17.2%. This is a direct consequence of more training and playing opportunities throughout all age grades combined with an increase in the value parents attach to GAA activity. B
- Based on the value parents are willing to pay for Non GAA exercise and physical activity for their child they would have to pay €4,983.04 to the private sector per child over that period of time.
- The general wellbeing derived from playing Gaelic Games and personal development were identified by parents as the two most important outcomes of their children's involvement in the G.A.A
- Parents value a one hour training session delivered by the GAA at €7.63 per hour compared to €6.17 in 2015.
- Parents place a value of €8.03 per hour of general exercise / physical activity where their child can obtain the range of health and sports from being physically active.
- Parents consider €7.97 a fair amount to pay for one hour of activity for their children in a non-sports activity.
- Based on the value parents place on one hours GAA activity the following represents the value received per child in a GAA season i.e. the value of the total seasons playing and training activity based on parents' valuation of one hours training and coaching and current level of playing activity per each age group.

Age Grade	Value of GAA season
Under 8	€ 267.75
Under 10	€ 374.85
Under 12	€ 405.45
Under 14	€ 357.67
Under 16	€ 365.28
Under 18	€ 304.40

- Underage Players value one hours coaching delivered through the GAA at €4.21 per hour.
- Under 14s surveyed valued one hours GAA coaching at €6.14 while under 16's valuation was €4.06 and €4.31 for minor players.
- The overall average value amount underage GAA players are willing to pay for one hour's entertainment in a non-sporting activity is €6.88.



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- Under 14s valued one hours non sport entertainment at €7.57, under 16s at €6.39 and minor players at €7.36.
- The overall average amount players are willing to pay for one hour of general exercise or sports activity (non GAA) is €4.87.
- Under 14s surveyed indicated they are willing to pay on average €5.11 for one hour of general exercise or sports activity (non GAA) while under 16s are willing to pay €4.77 with minors are willing to pay €4.96 per hour.
- Munster GAA activity in schools is responsible for the generation of 1.51 million playing hours of GAA activity across primary schools through Go Games coaching and blitzes.
- There are 649 primary schools with hurling Go Games blitz programmes with 47,429 players. The average number of blitzes played by a player is 5.
- There is a total of 770 primary schools with football Go Games blitz programmes with 60,378 participants. The average number of blitzes played by a player is 4.
- There is a total of 914 primary schools receiving Go Games coaching programmes with 84,359 participants.
- A total of 142 post primary schools are engaged with Games Development activities with Munster Council GAA personnel.

### Go Games Outputs

- The average number of blitzes played by an underage GAA player is 7
- 79% of all primary schools in Munster participated in 5+ football blitzes
- 67% of all primary schools in Munster participated in 5+ hurling blitzes
- 86% of primary schools participated in 8 or more training sessions
- There is a total of 385 Clubs with a U8 Club Go Games Blitz Programme (i.e. 5+ blitzes)
- 390 Clubs have a U10 Club Go Games Blitz Programme (i.e. 5+ blitzes)
- There is a total of 386 Clubs with a U12 Club Go Games Blitz Programme (i.e. 5+ blitzes)
- The number of players in Go Games Blitz Programmes is 25,406

### Super Touch Outputs

- 50% of all post-primary schools in Munster participated in 3+ games blitzes
- The number of clubs with a Super Touch Blitz programme is 213 with 3,818 participants. The average number of blitzes played by a player is 4.
- The number of school Super Touch Blitz programmes is 102 with 4,419 participants. The average number of blitzes played by a player is 4.
- Over 17,600 hours of secondary level player activity is generated through the schools Super Touch Blitz programme across the province.





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### Talent Academy Outputs

- A total of 16 Talent Academy Hurling U.14 Squads exist in the province with 474 participants
- There are 12 Talent Academy Hurling U.15 Squads with 305 participants.
- A total of eight (8) Talent Academy Hurling U.16 Squads exist with 220 participants
- A further 14 Talent Academy Hurling U.17 Squads are in operation with 424 participants
- There are 16 Talent Academy Football U.14 Squads with 470 participants
- A total of 13 Talent Academy Football U.15 Squads exist with 349 participants.
- Eight (8) Talent Academy Football U.16 Squads are in operation with 259 participants.
- Six (6) Talent Academy Football U.17 Squads are in operation with 202 participants.

### Coach Education Outputs

- 136 Foundation Courses (including 21 online foundation courses)
- Delivery of 31 Award 1 Courses
- Delivery of 2 Award 2 courses
- There are 90 active tutors in Munster
- Delivery of 63 online coaching courses
- Hosted 63 workshops across the province

# Munster Council G.A.A.

Return on Coaching Investment



## SECTION ONE

### INTRODUCTION





# Munster Council G.A.A. Return on Coaching Investment

## 1.1 INTRODUCTION

Repucon Consulting was commissioned by Munster Council GAA to undertake coaching return on investment analysis across its provincial games development activities. The review of 2019 coaching investment by Munster Council GAA is a follow up study to similar research undertaken in 2011 and 2015.

The methodology employed for the 2019 review is consistent with the approach employed in these previous studies, facilitating direct data comparisons and identification of any emerging trends from the three studies. The coaching return on investment study is based on the creation of a socio-economic measurement system to value the coaching outputs of Munster Council GAA, its coaching channels such as the Games Development structures and the activity of clubs and schools. The research approach is based on a Social Return on Investment (SROI) methodology used to measure intangible and non-market traded services i.e. creation of a value system around the coaching services provided to underage players across the province.

The SROI assessment programme, extending from 2011 to 2019, provides an indication of the efficiency of the investment by Munster Council GAA into annual coaching activity. It highlights the value of its benefits compared to the value of the resources that may have been invested elsewhere e.g. capital investment projects. The measurement approach employs a monetary value system that represents the social value created by the coaching interventions. This accounts for the entire range of the value generated i.e. beyond a narrow sports focused dimension. This allows for the calculation of a benefits to costs ratio. For example, a ratio of 2:1 indicates that an investment of €1 into provincial coaching structures delivers €2 of social value i.e. a value associated with the benefits GAA participation generates.

SROI is a measurement framework increasingly used in sports to understand, measure and report the social and economic value created by an intervention, programme, policy or organisation's activity. The SROI approach is widely employed to determine the impact of investment into sports provision and the return generated by the governing body. This is principally based on the value the end user places on the key outputs of the coaching investment i.e. the value placed by players and / or parents on one hour of GAA coaching. This is assessed versus the subsequent value received over the course of a GAA season, based on the outputs of their club and the price paid in terms of annual membership.

This SROI assessment model has its foundations in traditional economic evaluation and is recognised for providing a holistic measurement framework through its inclusion of both social and sport impacts from the perspective of stakeholders, namely clubs, parents and players. The approach generates a valuation reflecting the wider impacts that arise from the coaching interventions. These include outcomes such as physical wellbeing, mental wellbeing, individual development, social and interpersonal development in addition to a player's sports development.



## Munster Council G.A.A. Return on Coaching Investment

The following represents the main activity base for Munster Council GAA games development activities through its club and schools base.

Table 1.1.1: 2019 Registered juvenile GAA clubs and schools involved with games development activity

County	Clubs	Primary Schools	Post Primary
Clare	44	109	16
Cork	148	340	52
Kerry	66	129	18
Limerick	60	128	22
Tipperary	67	139	22
Waterford	37	69	12
Total	422	914	142

In developing the SROI value system, the following research methodology was employed;

### 1. Survey of Second level students

- a. Sample Size - 674 completed surveys
  - i. Surveys conducted in second level schools across all six Munster counties focused on Transition Year students.
- b. Key Research Objectives
  - i. Determine value system that underage players place on GAA and non GAA sports activity.
  - ii. Assess factors contributing to fall off in Gaelic Games participation among teenagers

### 2. Survey of Parents of underage players

- a. Sample Size - 464 completed surveys
  - i. Survey of parents of underage GAA players across all six Munster counties
- b. Key Research Objectives
  - i. Determine value parents place on the coaching provided to their children at all age grades.
  - ii. Assess the level of uptake of coaching and playing provided by clubs among underage players





## Munster Council G.A.A. Return on Coaching Investment

- iii. Establish the outputs of GAA coaching that parents attach the highest values.
- iv. Establish the benefits and outputs of GAA coaching where parents attach the highest values i.e. identify the most important reasons for participating in GAA activity.

### 3. Survey of Munster GAA clubs

- a. Club Sample size – 366 completed surveys from a total of 422 eligible clubs
  - i. Online survey of all Munster GAA Clubs - 88% response rate.
- b. Research Objectives
  - i. Examination of the current coaching and playing outputs of all clubs with underage structures.
  - ii. Identify areas for future coaching development focus.
  - iii. Identification of anticipated challenges in managing the current coaching provision by clubs.
  - iv. Analyse participation levels and rates of retention across each age category.
  - v. Analyse player participation levels based on cross analysis with other research data e.g. parents estimation of their child's participation rate in annual club activity.

### 4. Review of Munster GAA Coaching Data

- i. Examine the scale of Munster Council GAA activity from games development to school-based activity.
- ii. Analyse the overall volume of hourly inputs and expenditure into coaching activity by Munster Council GAA.
- iii. Review of annual Munster GAA Coaching data across all operational levels impacting on underage games.

### 5. Review of Munster GAA Player Numbers Data

Following the primary research data collection, analysis was conducted to assess the following key values that are used in the SROI model to determine the overall coaching outputs across the provincial structures and the associated return on investment generated.

- 1. Value generation for GAA coaching of underage players



## Munster Council G.A.A. Return on Coaching Investment

2. Value generation of non-GAA sports activity
3. Value generation of non-sport activity.

The values determine the market value each cohort places on GAA coaching, non GAA sports and non-sports activity. These values are subsequently applied to a financial model to estimate the overall return on investment, lifetime value of coaching for underage players and the annual return on GAA membership paid by parents.



## SECTION TWO

# MUNSTER COUNCIL GAA CLUB RESEARCH



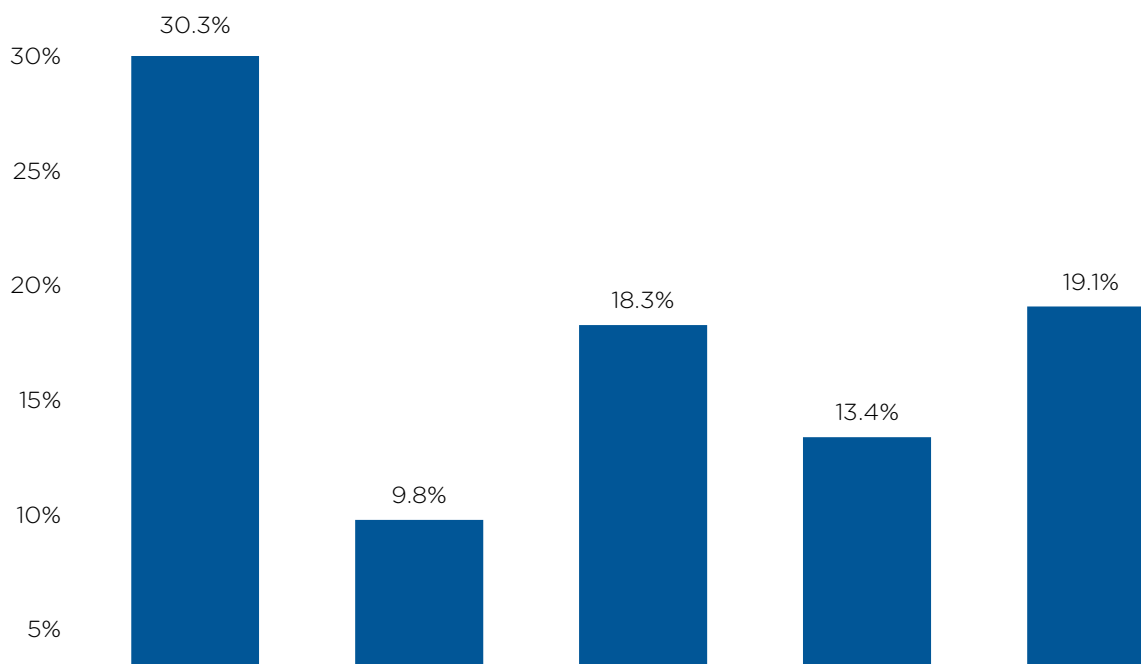


## Munster Council G.A.A. Return on Coaching Investment

### 2.1 MUNSTER GAA UNDERAGE CLUBS OVERVIEW

Munster Council GAA underage clubs were invited to participate in the study through an online survey issued to all club secretaries. A total of 422 underage GAA clubs are currently registered in Munster, representing a slight decrease from 430 underage clubs registered in 2015. A total of 366 clubs responded to the survey across the province. The number of club responses received from each of the counties are as follows.

Figure 2.1.1: Breakdown of underage club replies by county

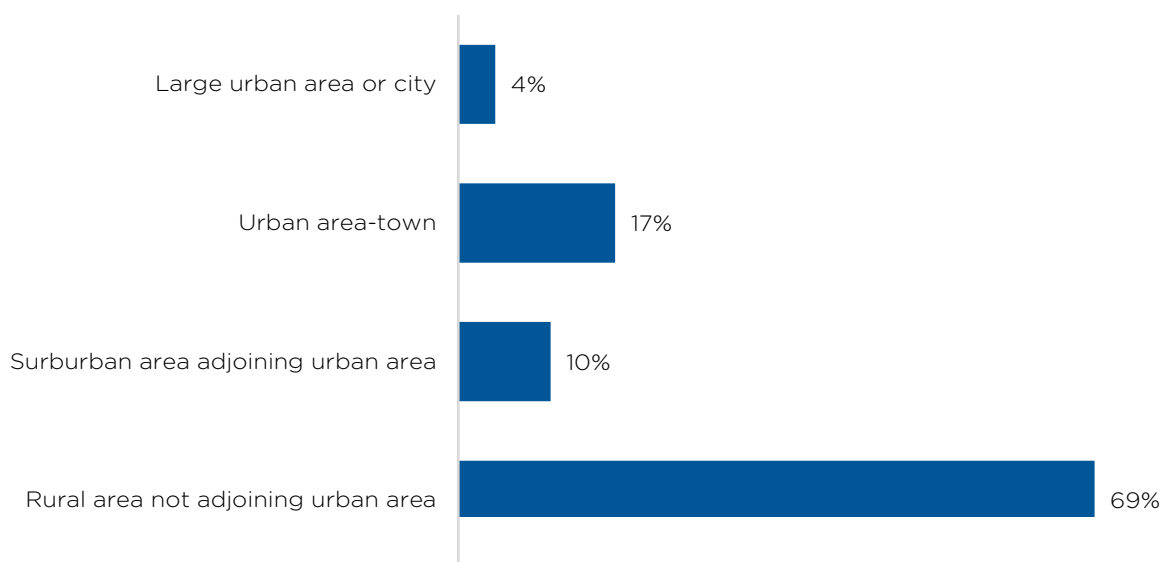






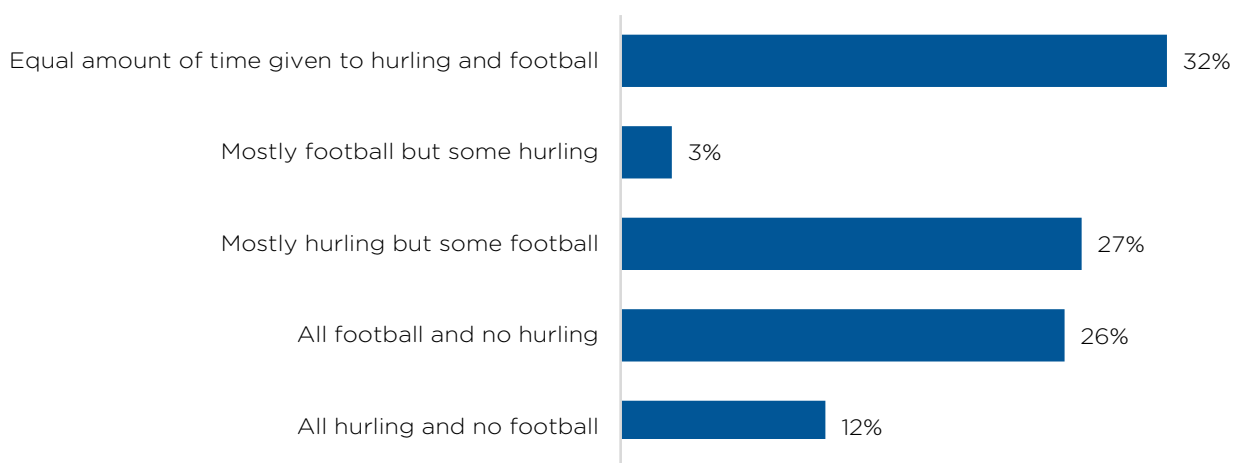
## Munster Council G.A.A. Return on Coaching Investment

Figure 2.1.2: Profile of club location



A total of 69% of replies were received from clubs located in the rural area not adjoining an urban area. A further 10% were received from clubs located in suburban areas that adjoin an urban area e.g. suburbs on the hinterland of a large urban area. A total of 21% of replies were received from clubs located in an urban town or large urban area or city.

Figure 2.1.3: Overview of club playing activities

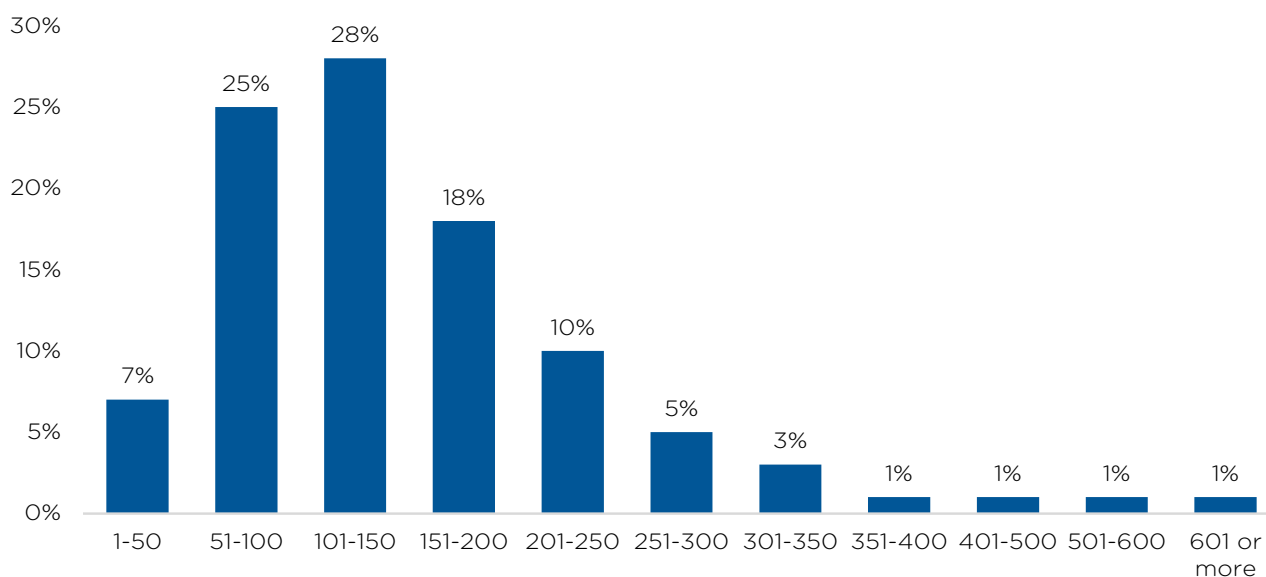




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Almost one third of clubs indicated they provide an equal amount of time to both hurling and football activities for underage players. A further 27% indicated they play mostly hurling but some football while 3% play mostly football but some hurling. 26% of replies were received from clubs that play only football with no hurling while 12% of clubs only play hurling.

Figure 2.1.4: Overview of numbers of underage players registered with clubs

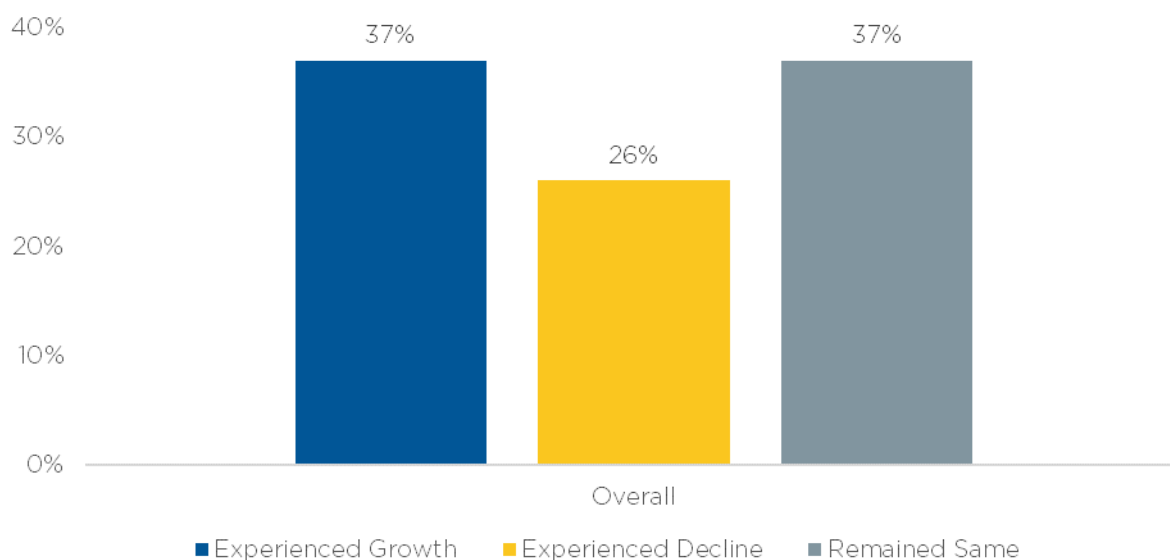


The highest percentage of clubs catered for between 101-150 underage players (28%) with a further 25% indicating they cater for between 51-100. 60% of clubs stated they cater for a maximum of 150 underage players. 12% of clubs stated they had in excess of 250 players registered in 2019.



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Figure 2.1.5: Clubs growth and decline in playing numbers over the past three years

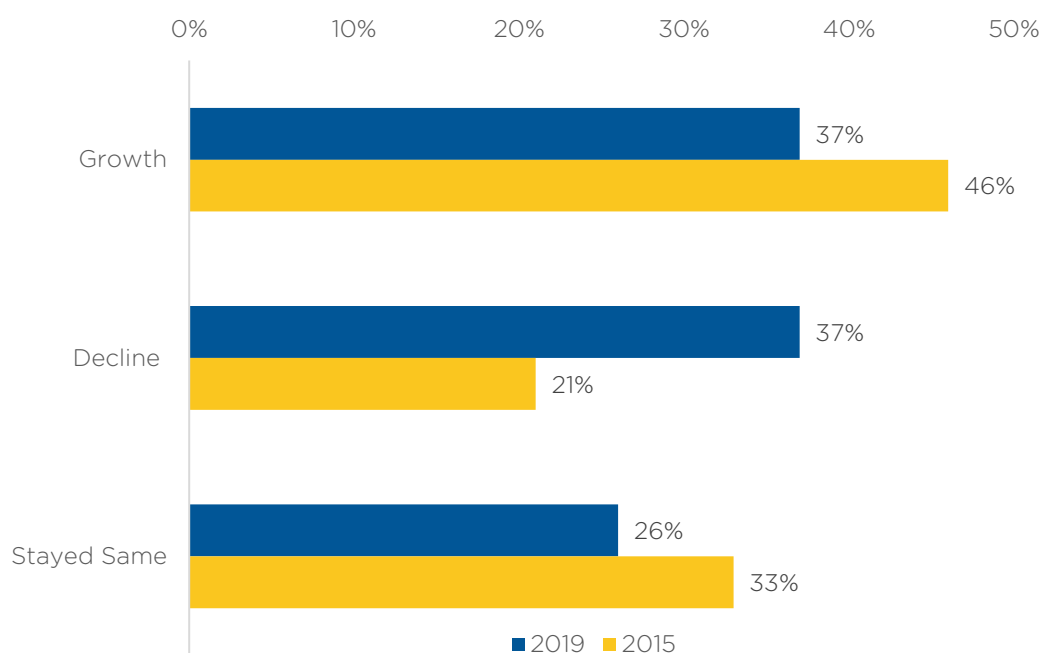


A total of 37% of clubs across Munster had experienced growth in their playing numbers in the past three years while 26% stated they had experienced a drop in playing numbers. A further 37% indicated their playing numbers remained the same over the last three years. When examined in the context of the 2015 study, the rate of player growth in clubs has declined from 46% to this year's figure of 37%. In the 2015 review, one in five clubs indicated that they had experienced a decline in playing numbers in the past three years. This has increased to 26% in the 2019 assessment.



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Figure 2.1.6: Comparison of club growth and decline in player numbers 2015 -2019



Clubs in Cork and Waterford indicated that they had experienced growth in numbers that exceeded the overall average of 37%.

Almost half of clubs in Cork (47%) had experienced growth in playing numbers in the past three years while 42% of Waterford clubs stated they had experienced an increase in underage players for the same period. Kerry clubs recorded the lowest level of growth.





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Figure 2.1.7a: Breakdown of growth / decline in playing numbers by county

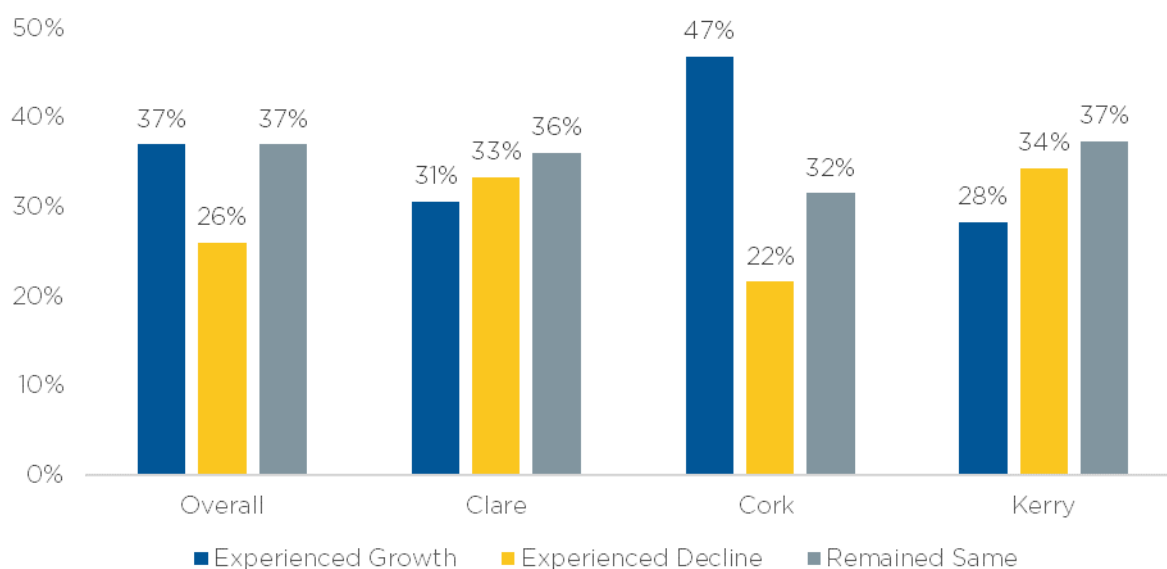
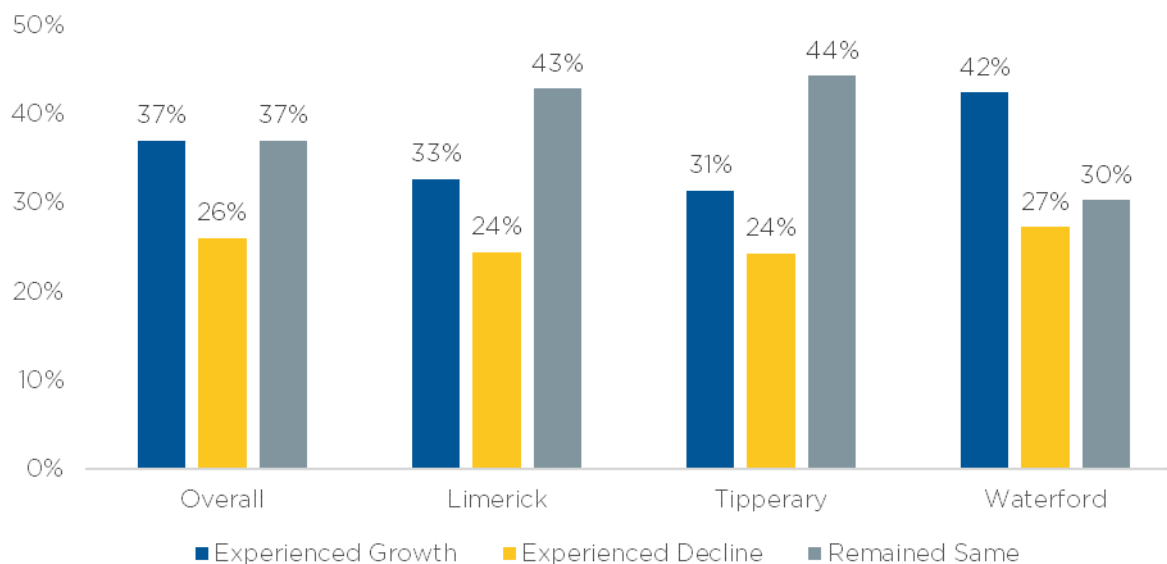
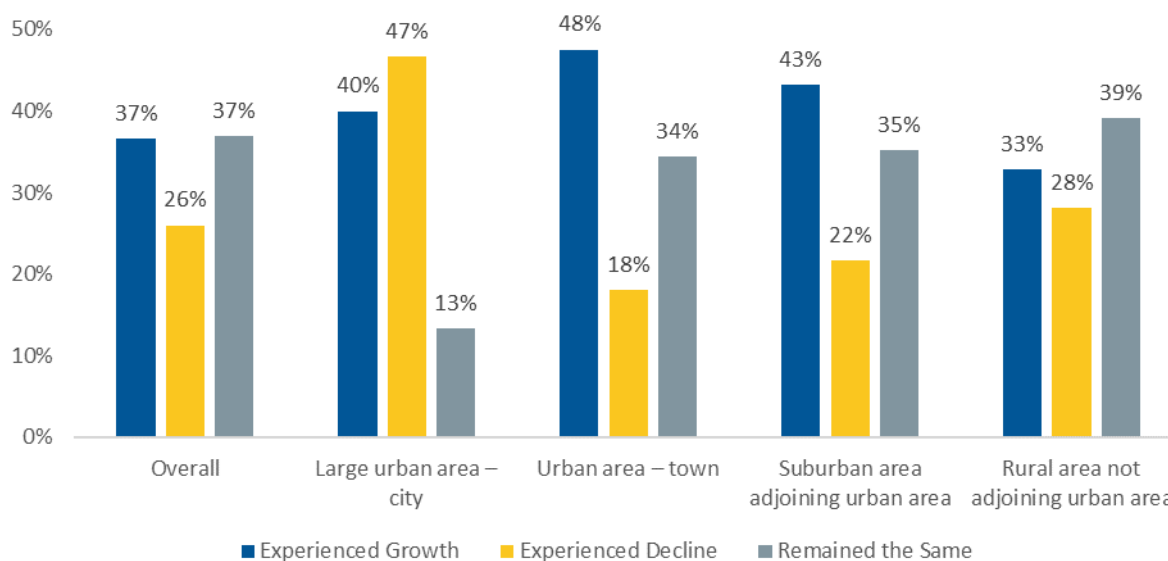


Figure 2.1.7b: Breakdown of growth / decline in playing numbers by county



## Munster Council G.A.A. Return on Coaching Investment

Figure 2.1.8: Player numbers growth / decline examined by geographic area



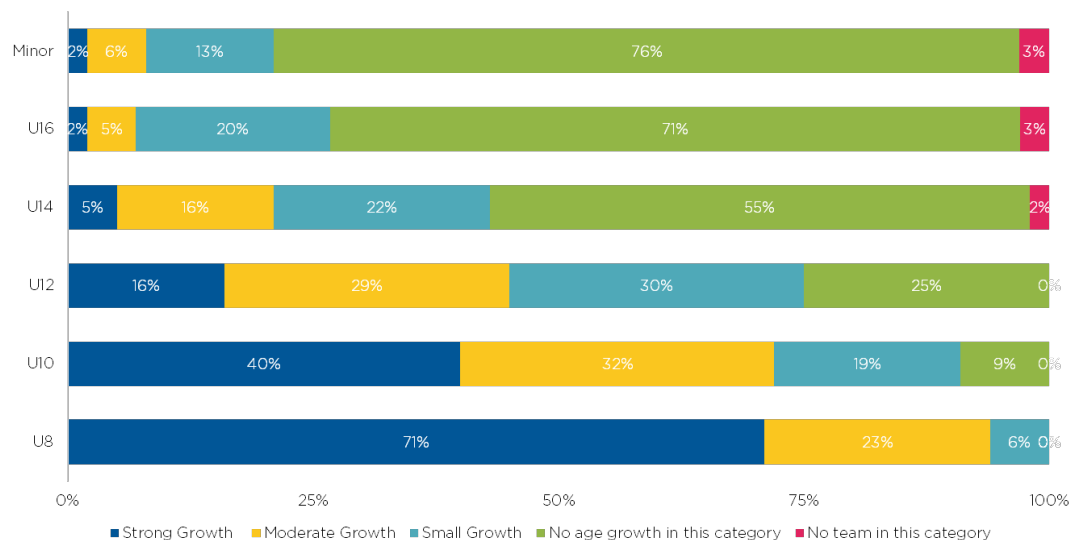
When the data is examined based on the geographic location (e.g. urban versus rural), urban areas and their hinterlands all experienced growth. Urban town clubs recorded the highest level of growth (48% compared to the overall average of 37% growth).

Rural areas have experienced the lowest levels of growth over the past three years. 33% of clubs stated they had recorded an increase in underage playing numbers, compared to the overall growth average of 37%.

Rural areas also recorded the second highest level of a decrease in playing numbers. However, it was city clubs who recorded the highest level of decline in playing numbers. 47% of clubs located in cities recorded a fall in numbers compared to the overall 'experienced decline' average of 27%. Urban towns have recorded the lowest levels of decline in the past three years in playing numbers.

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Figure 2.1.9: Player numbers growth in clubs examined by age group



Clubs who indicated they had experienced a level of growth over the last number of years were examined in the context of the age groups that had attracted the highest level of growth. Based on the overall playing numbers across the province and younger players accessing the sport, the highest levels of growth were in the under 8 and under 10 categories. When the data of the clubs whose numbers had dropped, it is the older age categories that recorded the highest levels of fall off in player numbers.

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Figure 2.1.10: Player numbers decline in clubs examined by age group

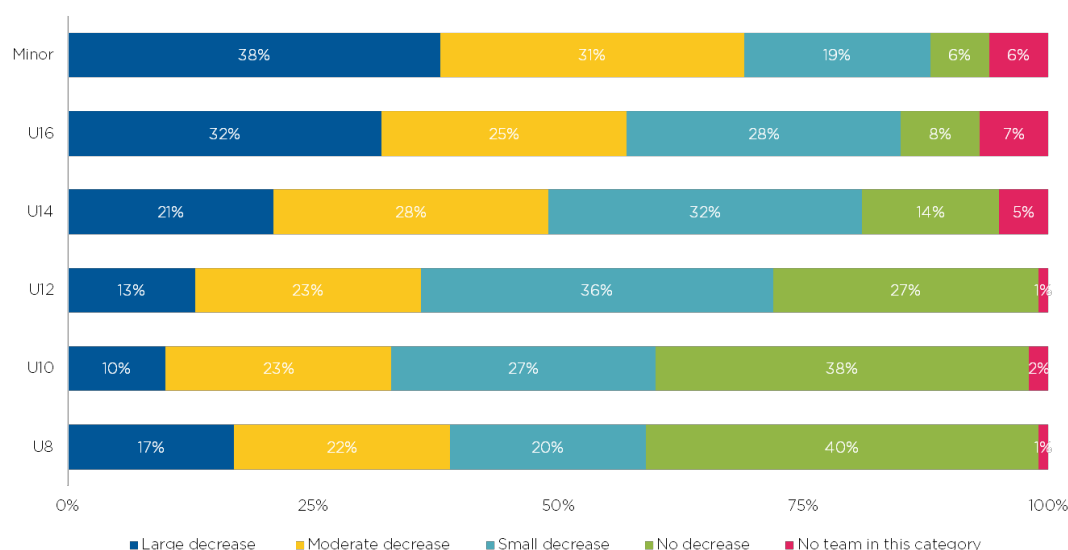


Table 2.1.11: Annual registered playing numbers by age group – 2011 - 2019

Age Group	2011		2015		2019	
	Players	% Participation Decline	Players	% Participation Decline	Players	% Participation Decline
Under 8	12,349		13,434		14,060	
Under 10	11,333	-8.3%	10,129	-24.6%	10,416	-25.9%
Under 12	10,431	-8.0%	10,691	5.5%	10,478	0.6%
Under 14	9,241	-11.4%	9,898	-7.4%	9,059	-13.6%
Under 16	7,849	-15.1%	8,852	-10.6%	7,800	-13.9%
Under 18	7,039	-10.3%	7,784	-12.1%	6,725	-13.8%
U8 - U18		-43.0%		-42.1%		-52.2%

The average overall decrease in players numbers from the under eight category to minor level is 46.1%. The fall in the registered players figures assessed for 2019 highlights an above average decline of 52.2%. The largest fall off is evident among players registered at under eight and under ten, following a similar pattern to the 2015 numbers. Registration numbers remained static to under 12 and decrease at a rate comparable with previous years.



# Munster Council G.A.A. Return on Coaching Investment

## 2.2 KEY CLUB OUTPUTS

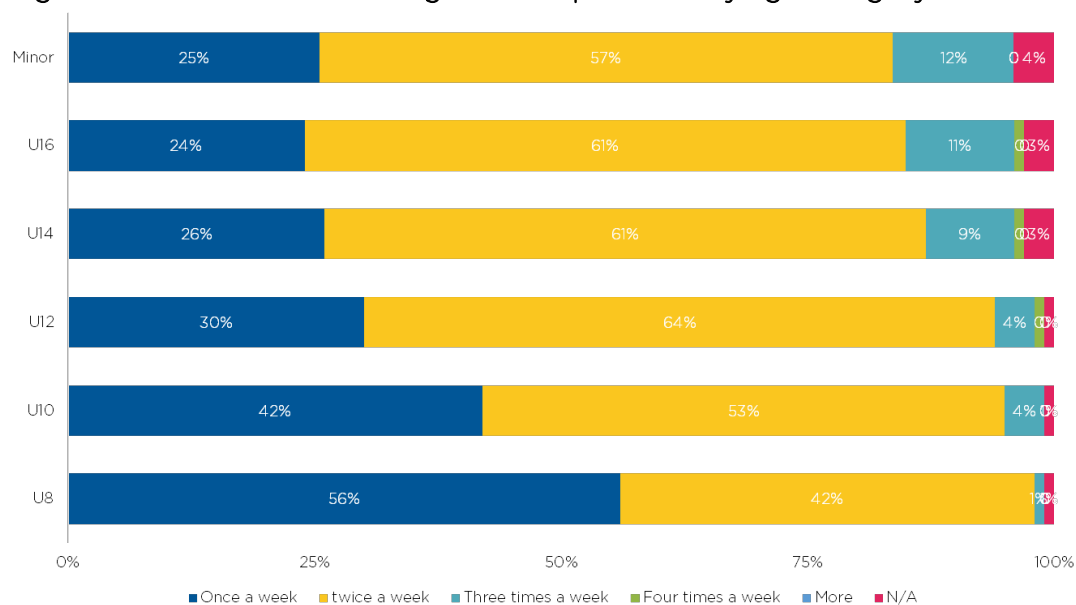
The following represents the key annual training and games outputs by all Munster Council GAA clubs. The volume of activity generated by clubs is applied to the analysis of the overall level of weekly coaching and games provision and assessment of total GAA outputs across the province.

Table 2.2.1: Summary of GAA training and playing season pattern

Start Month	% of Clubs
January	15%
February	49%
March	30%
End Month	% of Clubs
September	17%
October	54%
November	23%

The vast majority of clubs commence their training and playing activities in February (49% with a further 30% of clubs starting underage activity in March). October (54%) is the most popular month for clubs to stop underage activity with 23% stating they finish in November.

Figure 2.2.2: Number of training sessions per week by age category







## Munster Council G.A.A. Return on Coaching Investment

In order to understand the playing patterns of the various underage teams, clubs were invited to outline the number of training sessions held per week across each age category. The majority of clubs provide training either once or twice a week. However, there is an increased number of clubs providing a higher frequency of training in the Minor and Under 16 age categories.

Over half (56%) of clubs deliver coaching once a week to under 8s. This increases to 53% of clubs providing training twice a week to under 10s. When underage players reach under 12, almost two thirds of clubs are providing training at least twice a week. After the under 12 age category, the frequency of training at under 14 to Minor increases considerably, reflecting the commencement of competitive championships.

**Table 2.2.3: Average number of mentors per age category**

Age Group	Average Number of Mentors
Under 8	4.72
Under 10	4.48
Under 12	4.29
Under 14	3.85
Under 16	3.65
Under 18	3.39

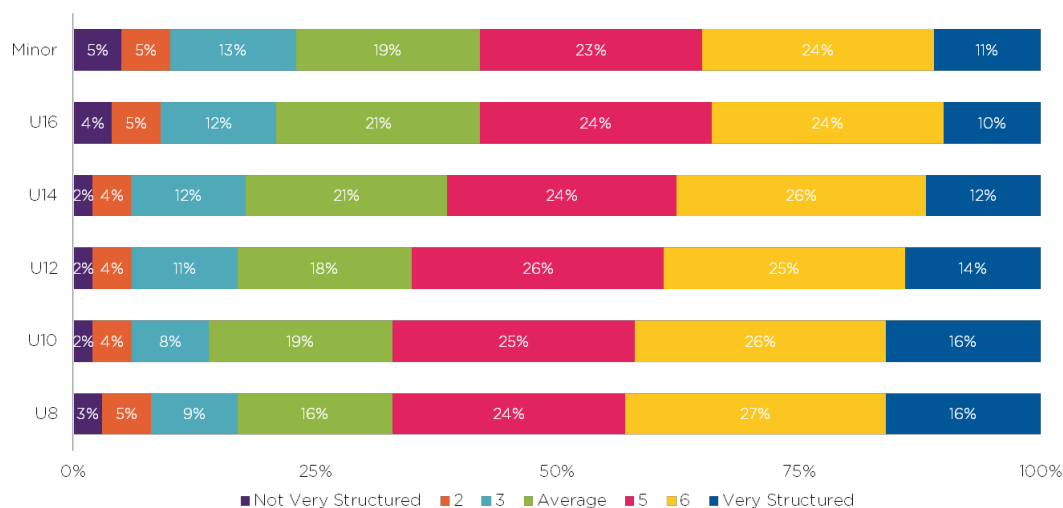
The total number of mentors involved in Munster GAA clubs in 2019 is estimated at 10,340. This equates to an average of 25 team mentors and coaches per club across the province. This has increased from an average of 20 per club in the 2011 club research and remains at the same level as the numbers involved in teams in 2015.

The number of mentors associated with the various age groups also reflects the volume of players across each age category. Underage teams in the formative playing years attract an average of five mentors per team decreasing to an average of three for Minor teams.



## Munster Council G.A.A. Return on Coaching Investment

Figure 2.2.4: Clubs rating of coach education structures within the club examined by age group

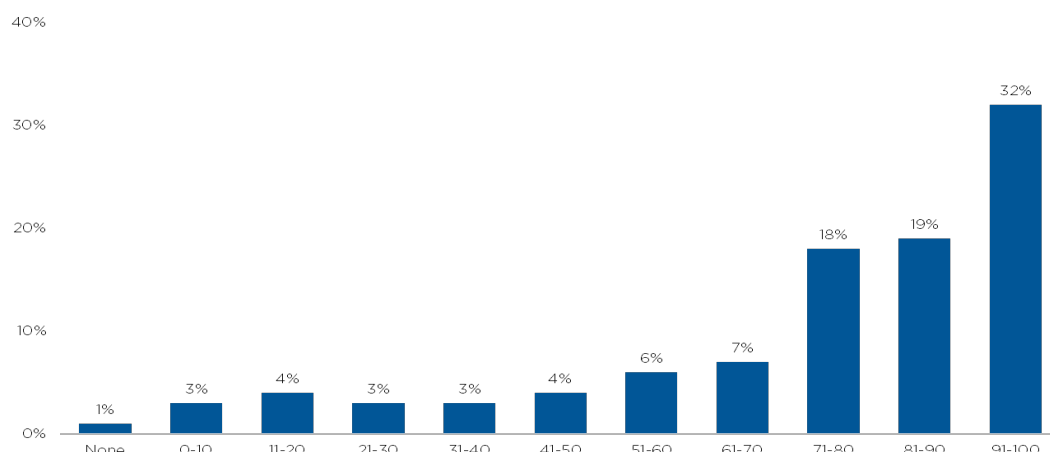


Analysis of the club feedback would suggest that the existing coach education structures are more highly rated for younger age categories than for older age groups. The analysis of the above average ratings received by clubs suggest that the coach education structures for under 8, under 10 and under 12 exceed what is delivered for clubs from under 14 to minor. Minor and under 16 teams recorded the highest levels of below average coach education structures in the ratings received by clubs. This is aligned with the volume of early stage coaching programming i.e. Foundation Level and Level 1, more closely associated with teams in the younger age categories.



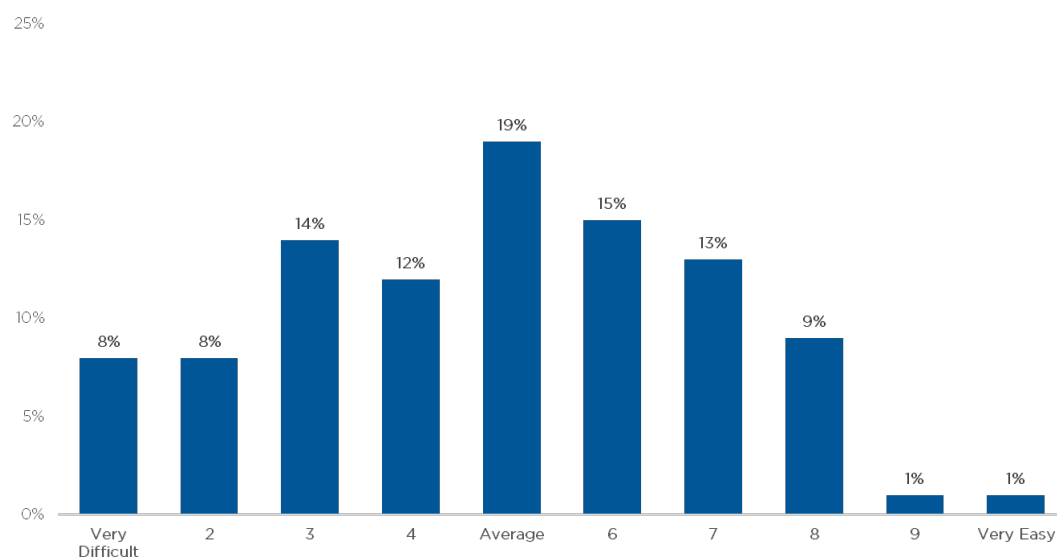
## Munster Council G.A.A. Return on Coaching Investment

Figure 2.2.5: Percentage of club mentors/coaches with Foundation or Higher Level coaching



A total of 69% of clubs indicated that 70% or more of their mentors and coaches have achieved a foundation or higher level coaching award delivered through Munster Council GAA. Less than one third of clubs indicated that all of their club mentors and coaches have achieved foundation or higher level coaching awards.

Figure 2.2.6: Level of ease to attract new coaches or volunteers into the club

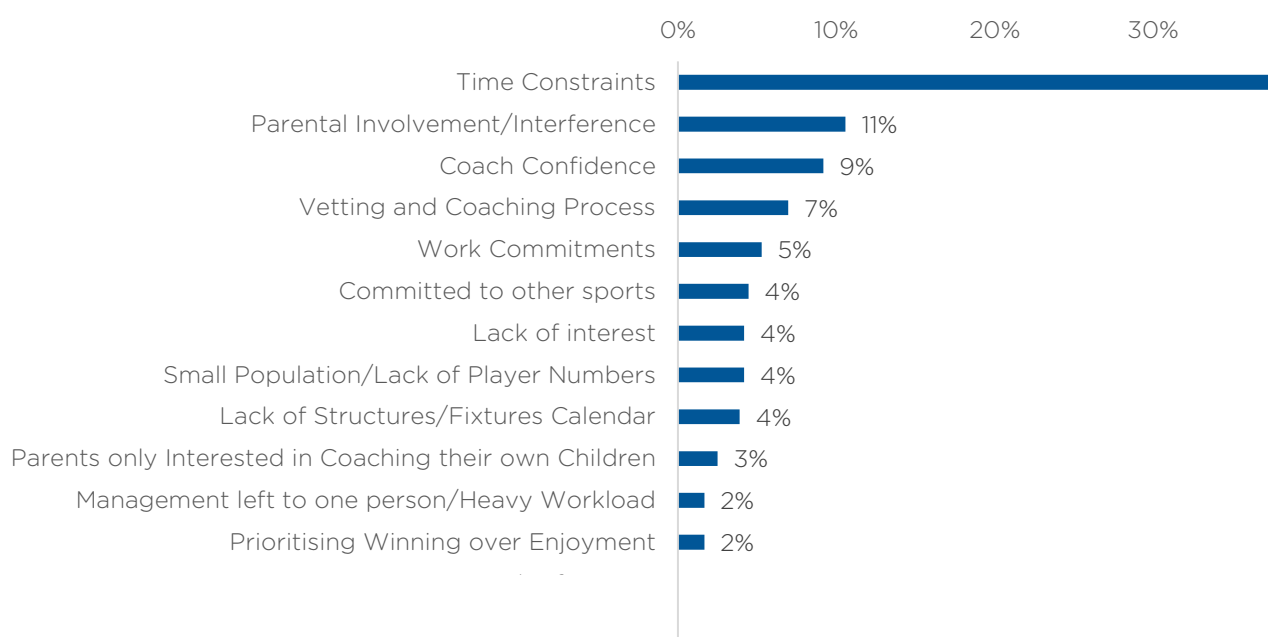




## Munster Council G.A.A. Return on Coaching Investment

Clubs were invited to rate the ease or level of difficulty they encounter with attracting new volunteers, mentors and coaches to assist with club activity. Almost one third of clubs rated attracting new volunteers in the 'very difficult' categories with 42% rating it as above average in the level of difficulty. Significantly, only 11% of clubs rated attracting new mentors and coaches in the 'very easy' categories.

Figure 2.2.7: Key issues faced by clubs in attracting new coaches / mentors

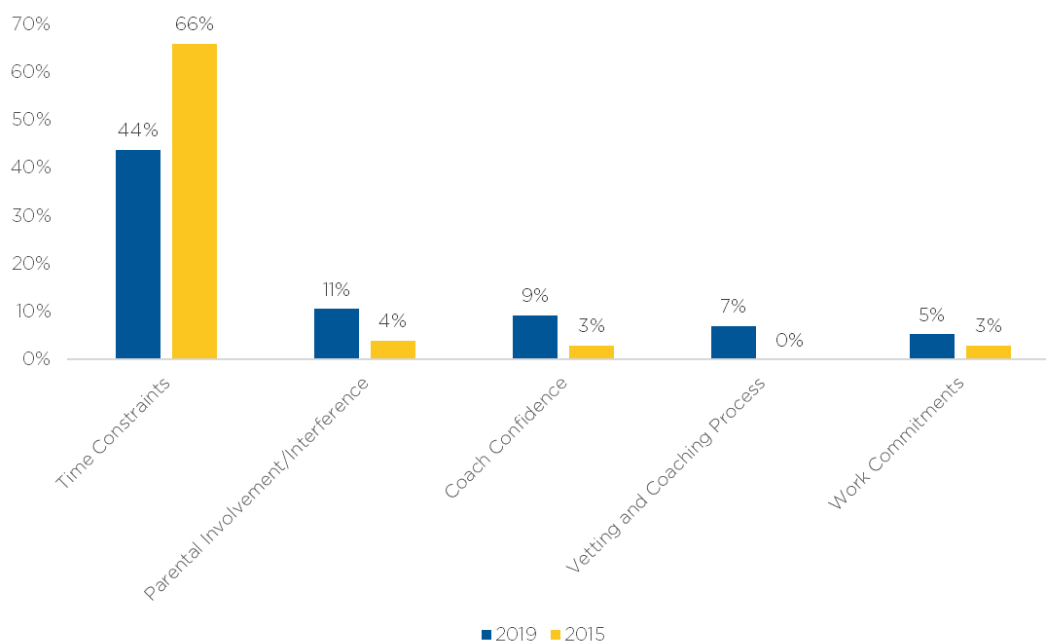


The key issues faced by clubs in attracting new coaches and mentors concentrated on the time constraints on being involved with teams (44%). 11% of clubs highlighted parental involvement and interference as a challenge in attracting new coaches and mentors while 9% indicated that parents or potential volunteers were not confident enough to coach underage. A further 7% highlighted the level of “red tape” around vetting and coaching courses as a deterrent.



## Munster Council G.A.A. Return on Coaching Investment

Figure 2.2.8: Key Issues Faced by Clubs in Attracting New Coaches / Mentors (2015 versus 2019)



The key challenges in attracting new coaches and mentors were examined versus the previous 2015 research. In 2015, two thirds of responses mentioned time constraints as the main factor. This dropped to 44% in the 2019 research.

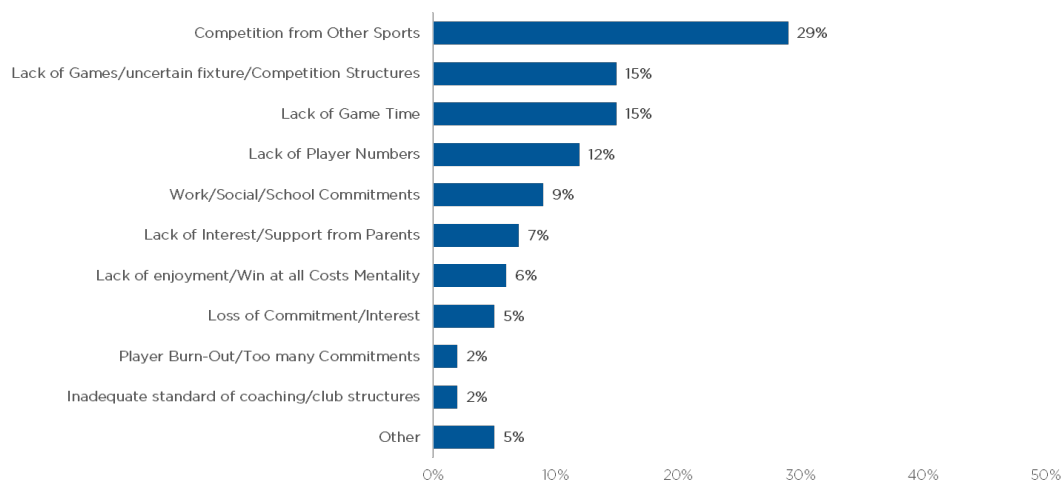
The issue which grew in terms of significance is the level of parental involvement and interference as a deterrent for volunteers to become involved. This factor grew from 4% to 11% between the 2015 and 2019 studies. Equally significant was the level of coach confidence. In 2019, 9% of clubs highlighted volunteers' lack of coaching confidence as the key issue compared to only 3% in 2015. A number of clubs highlighted a number of compliance issues as 'red tape' that acted as a deterrent in attracting new coaches. A total of 7% of clubs highlighted the issues around garda vetting and coaching courses as deterrents in their ability to attract new coaches and mentors. The fifth most significant factor was parental work commitments which was highlighted by 5% of clubs in 2019. This has risen from 3% in 2015.





## Munster Council G.A.A. Return on Coaching Investment

Figure 2.2.9: Clubs view on the main challenges in retaining underage players



The scale of competition from other sports to retain players at underage level was highlighted by 29% of clubs. A further 15% highlighted the lack of games and uncertainty around fixtures and competitions as a key challenge in retaining players. An equal number (15%) highlighted the lack of game time players are afforded at underage level. The challenges some clubs encounter in terms of decreasing player numbers was mentioned by 12% of clubs while underage players work, social and school commitments were highlighted by 9% of respondents. Additional factors mentioned included the lack of interest or support from parents while the lack of enjoyment arising from a “win at all costs” mentality was highlighted by 6% of club replies.



## SECTION THREE PARENTAL RESEARCH





# Munster Council G.A.A. Return on Coaching Investment

## 3.1 PARENTS SURVEY OVERVIEW

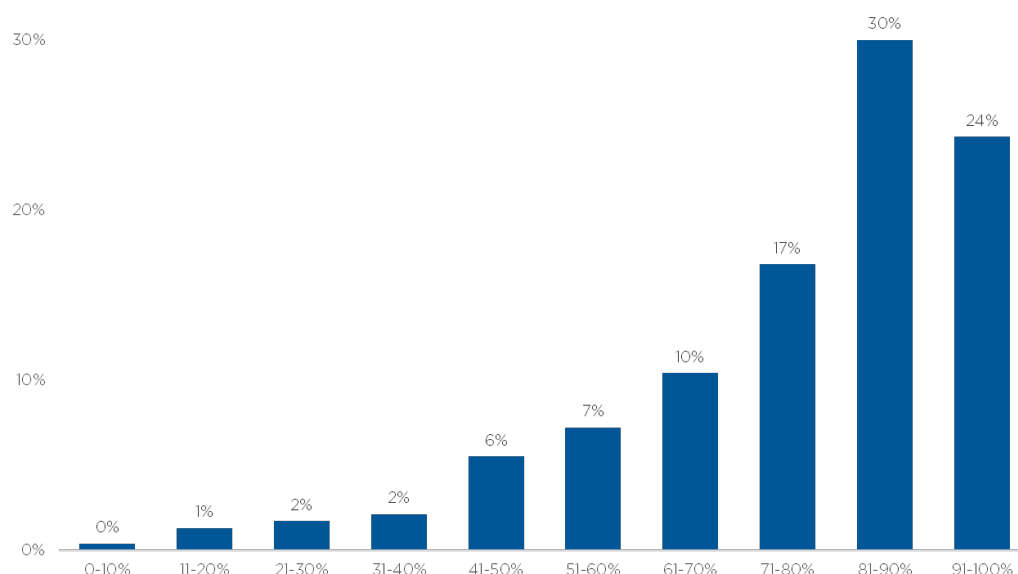
A survey of parents with children involved in GAA activity was conducted across the province. It was designed to gather a representative sample of respondents based on the age of children participating in GAA activity and their geographic location i.e. urban versus rural.

The primary focus of the research was to develop a parental value for their child's participation in GAA activities. The method employed was based on a Willingness to Pay (WTP) valuation system. Parents were invited to value the outputs delivered by the GAA in addition to valuing other non GAA / sport activity as an additional reference point.

In order to ensure consistency in the evaluation approach over the course of the 2011-2019 assessment period, the category of outcomes were aligned with the previous research. In order to reflect most recently associated benefits of sports participation, the categories of mental health and general player wellbeing benefits were added as areas for evaluation. This followed a review of probable benefits of GAA participation supported by analysis of international sports impact studies.

Parents were invited to self complete the coaching value survey. In addition to the value assessments and WTP model, parents rated the importance of a range of outcomes and a ranking of priority areas they perceived as the most important outputs of GAA participation.

Figure 3.1.1: Parents estimate of GAA training sessions/matches/blitzes attended by their child





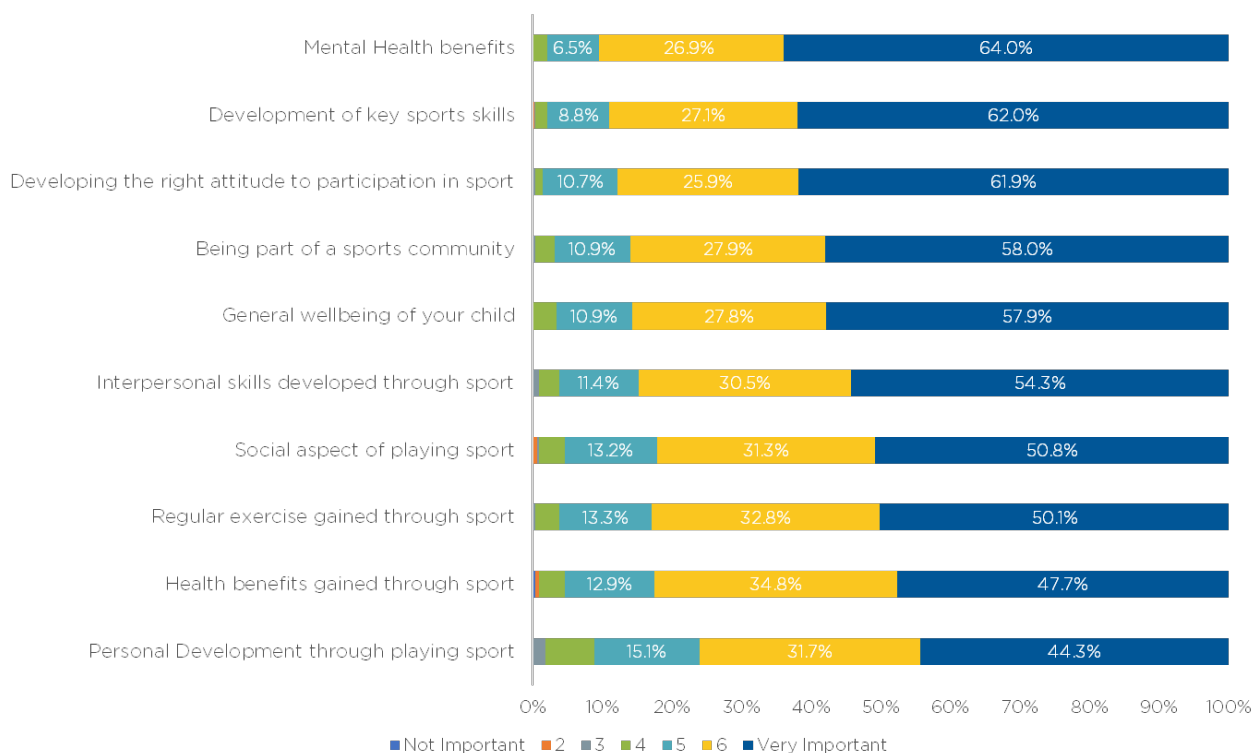
# Munster Council G.A.A. Return on Coaching Investment

The participation rates in coaching and playing activity are largely consistent with previous research. The 2019 figures highlight a small increase in the number of players who participate in at least 80-100% of all available sessions.

## 3.2 PARENTS VALUATION OF THE BENEFITS OF PHYSICAL ACTIVITY

Parents were invited to rank and rate the importance of a range of outputs from physical activity and social benefits of participation. The areas examined were consistent with previous research and agreed as key outputs of participation in sport i.e. physical, social and sport development.

Figure 3.2.1: Importance placed on key outputs of children's participation in GAA activity



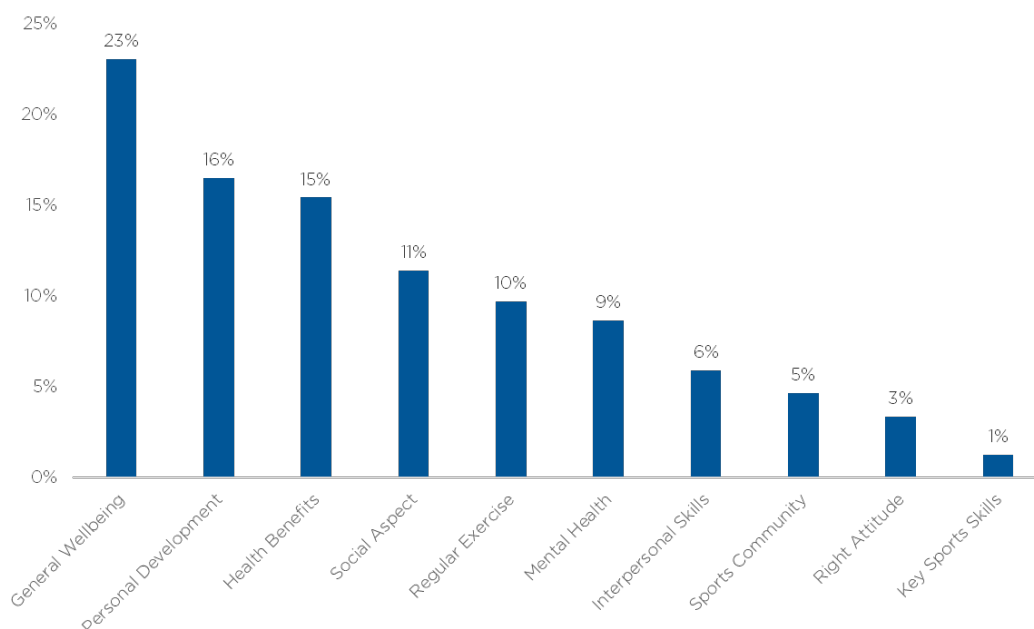
Mental health benefits, development of key sport skills and the opportunity for children to develop the right attitude to sports participation each achieved over 60% ratings as 'very important' outcomes. Significantly, only two of the nine elements assessed achieved less than 50% 'very important' ratings. These included the health benefits gained through sport and personal development through playing sport. These three factors, in addition to the



## Munster Council G.A.A. Return on Coaching Investment

social aspect of playing sport, recorded the highest levels of below average importance ratings. Almost 91% of parents rated the mental health benefits in the top two 'very important' rating categories while 89% attached a similar importance scoring to the development of key sports skills for their children.

Figure 3.2.2: Parents ranking of the Most Important output of their child's participation in GAA activity



Based on the criteria assessed as important outcomes of GAA participation, parents were invited to select the single most important outcome from their child's participation in GAA activity.

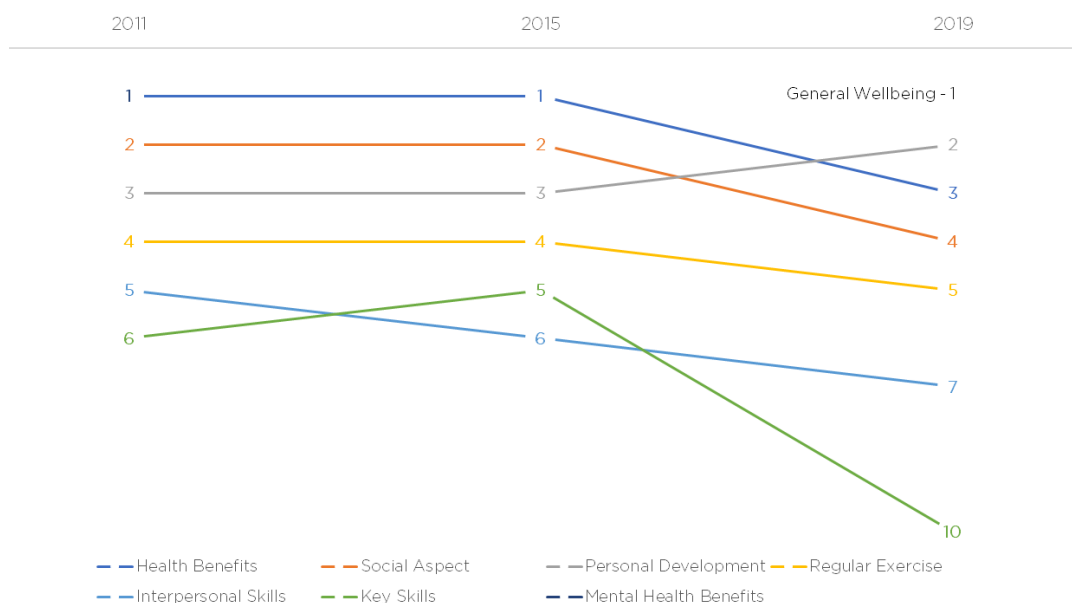
The top ranked output among parents was general wellbeing followed by personal development and the health benefits children gain. When parents were asked to single out one desired output, the importance of sports and skills development moved to a much lower ranking in contrast to the social and wellbeing benefits of GAA participation. Despite mental health benefits recording the highest number of very important ratings (see figure hereunder), it received the sixth most important ranking of the outputs examined.





## Munster Council G.A.A. Return on Coaching Investment

Figure 3.2.3: Comparison of aspects rated as Most Important 2011 – 2019



In the previous research, the health benefits and the social aspect in addition to personal development were consistently ranked as the top three outputs of children’s GAA participation. The importance of sports skills development was not considered as a key output in any of the previous research projects. The addition of new categories such as general wellbeing provided a greater level of focus among parents in terms of personal development, wellbeing and the health and social outcomes provided through sports and in particular GAA participation. This also became a very important factor in the subsequent analysis of the values placed by parents on GAA participation associated benefits.

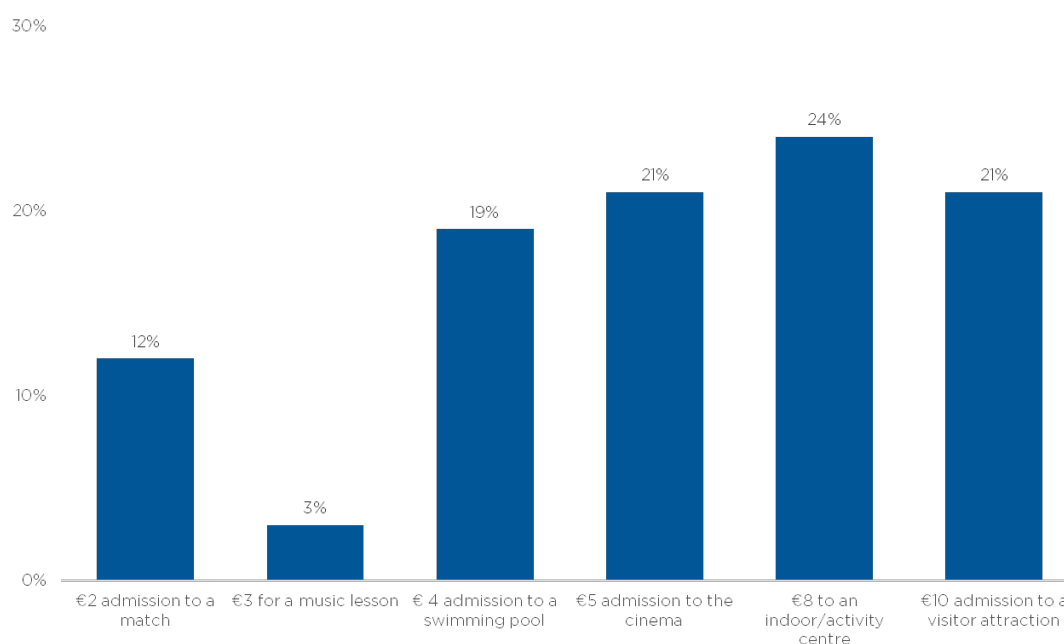


## Munster Council G.A.A. Return on Coaching Investment

### 3.3 PARENTAL VALUATION OF GAA PARTICIPATION BY THEIR CHILD

The following represent the parental value of children's participation in GAA activity in addition to ranking the importance of the associated sport, social and physical outputs.

**Figure 3.3.1: Parents value of activities matching the value placed on GAA participation**  
(Which of the following costs for activities matches the value you place on one hour of participation in GAA activity for your child)

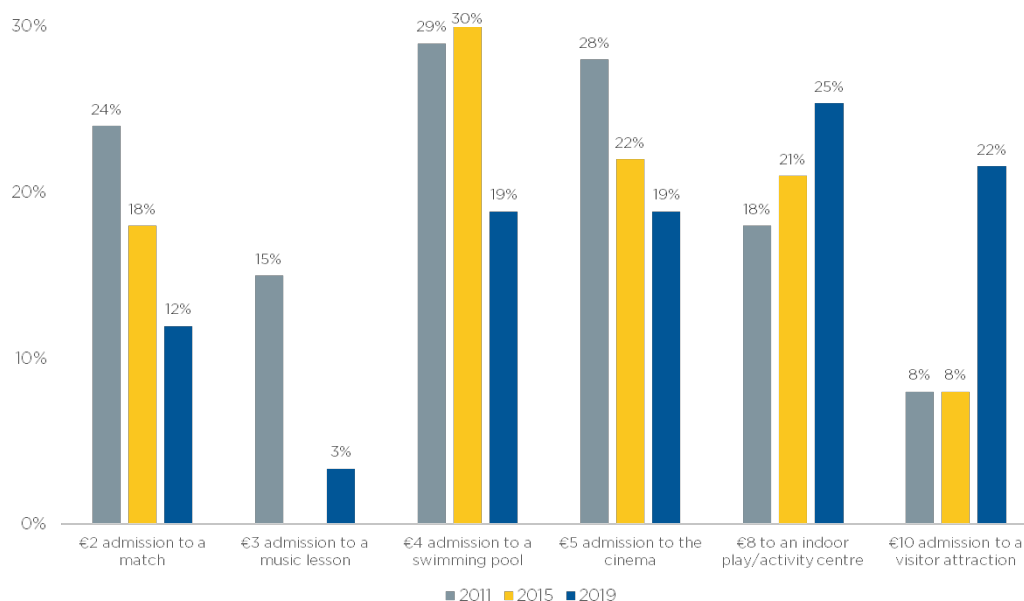


Parents were invited to assign a value which the most closely associated with one hour of participation in GAA activity for their child. The values were drawn from a range of different activities and scenarios that parents typically pay for an activity for their child. Significantly, over two thirds of parents attached a value of €5 or greater from the options provided. One in five parents matched a €10 value to one hour of activity with 24% associating an €8 payment for an indoor activity as matching an hour of GAA activity.



## Munster Council G.A.A. Return on Coaching Investment

Figure 3.3.2: Comparison of 2011-2019 parents' value of activities matching the value placed on GAA participation



When examined with previous research, a significant pattern emerged between the 2011 study and the 2019 findings. The values that match parents' view of one hour of GAA activity has increased significantly. In the 2011 to 2019 period there has been almost a reversal in values moving from associating GAA activity with lower per hour activity costs to the higher cost activities.

In 2011 the majority of valuations were placed below €5 with only 26% of parents comparing one hour of activity at a value above €5. This increased marginally in 2015 while now reflecting a complete reversal the value in 2019. The values that are subsequently recorded in this analysis are consistent with a higher value system among parents for an hourly output of GAA activity. Over one third of parents in 2019 matched the value at less than €5 compared to 38% in 2015 and 69% in 2011.



## Munster Council G.A.A. Return on Coaching Investment

Table 3.3.3: Summary of parental values of sport, non-sport and GAA activities

Activity	Value
Average cost of activities that parents currently pay for one hour of children's activities	€ 9.16
Amount considered fair by parents to pay for an hour of exercise to gain desired benefits	
Under 8 - Under 12 (value based on age profile of respondents children)	€ 7.90
Under 14 - Under 18 (value based on age profile of respondents children)	€ 8.60
<b>Overall</b>	<b>€ 8.03</b>
Amount considered fair to pay for one hour of activity in a non-sports activity	
Under 8 - Under 12 (value based on age profile of respondents children)	€ 7.82
Under 14 - Under 18 (value based on age profile of respondents children)	€ 8.34
<b>Overall</b>	<b>€ 7.97</b>
Value placed by parents on one hour of coaching delivered by a G.A.A. club	
Under 8 - Under 12 (value based on age profile of respondents children)	€ 7.65
Under 14 - Under 18 (value based on age profile of respondents children)	€ 7.61
<b>Overall Coaching Return on Investment Value</b>	<b>€ 7.63</b>

Parents were invited to value their children's participation in GAA activity. The values increased across all areas assessed from the cost parents are willing to pay for sport and non-sport activity through to the actual valuation of GAA activity. In the 2019 research, the average hourly cost of activities parents are currently paying for is €9.16, rising from €8.11 in 2015.

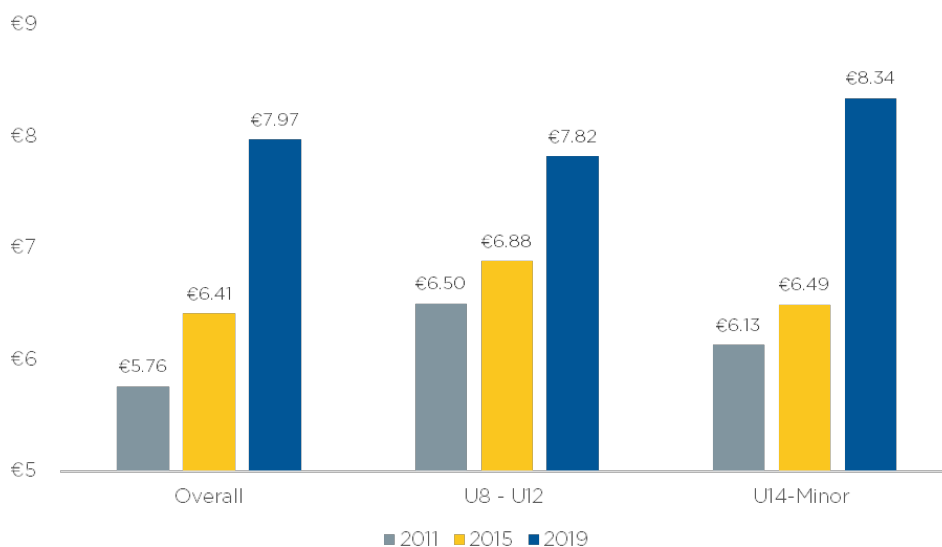
Parents were subsequently invited to indicate what they considered a fair amount to pay for an hour of exercise that would gain the desired benefits highlighted previously e.g. social, physical and sport. This increased to €8.03 overall with parents of older children willing to pay more for physical activity that provides the range of social, wellbeing and sports benefits outlined.

After assessing the parents valuation of activities that provide an hours exercise for children in addition to non-sports activities, parents were invited to suggest a value for one hours coaching being delivered by their GAA club. The overall hourly value was €7.63, representing an increase of 23.6% on 2015 parental valuation of one hour of GAA activity.



## Munster Council G.A.A. Return on Coaching Investment

Figure 3.3.4: Amount considered fair for one hour of non-sport activity 2011-2019



The values established by parents as a fair amount to pay for an hour of exercise from a non GAA activity highlights an increased propensity to pay for general entertainment or non sport activities for children. The research in 2011 and 2015 reflected a consistency in the overall hourly values for GAA activity. However, in 2019 parents appear to place a higher value on one hour of exercise from non GAA activities that produce the desired social, physical, sport and wellbeing benefits for their child. The biggest increase is among parents of children in the competitive age categories of under 14 to Minor.





## Munster Council G.A.A. Return on Coaching Investment

Figure 3.3.5: Value placed on one hour of coaching by a GAA club 2011-2019

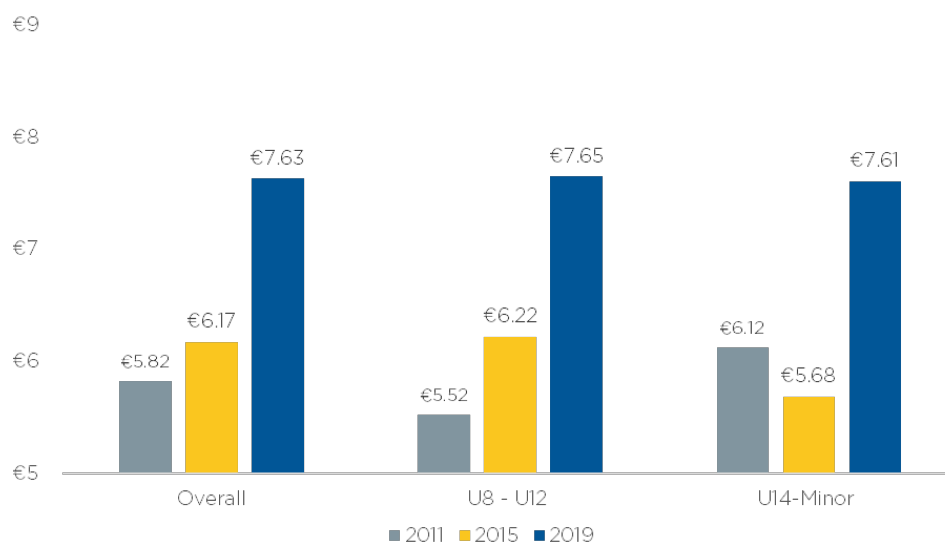
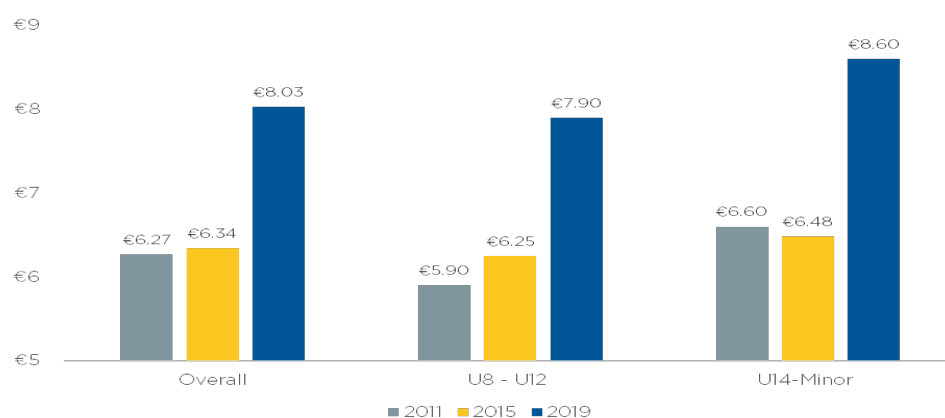


Figure 3.3.6: Amount considered fair to pay for one hour of exercise (non GAA activity) that produces the desired social, physical, sport and wellbeing benefits for a child



The following represents the summary of key parental valuation data collated from 2011-2019. The figures represent the values parents of underage players place on sport, non-sport and GAA coaching and playing provision, developed through the social (coaching) return on investment valuation system.



## Munster Council G.A.A. Return on Coaching Investment

Table 3.3.7: Comparison of parental values and coaching return on investment data 2011-2019

	2011	2015	% Change	2019	% Change
Average cost of activities that parents currently pay for one hour of children's activities	€7.90	€8.11	2.6%	€9.16	12.9%
Amount considered fair by parents to pay for an hour of exercise to gain desired benefits (value based on age profile of respondents children)					
Under 8 - Under 12	€5.90	€6.25	5.9%	€7.90	26.4%
Under 14 - Under 18	€6.60	€6.48	-1.8%	€8.60	32.7%
Overall	€6.27	€6.34	1.1%	€8.03	26.7%
Amount considered fair to pay for one hour of activity in a non sports activity (value based on age profile of respondents children)					
Under 8 - Under 12	€5.76	€6.41	11.2%	€7.82	21.9%
Under 14 - Under 18	€6.50	€6.88	5.8%	€8.34	21.2%
Overall	€6.13	€6.49	4.2%	€7.97	22.8%
Value placed by parents on one hour of coaching delivered by a G.A.A. club (value based on age profile of respondents children)					
Under 8 - Under 12	€5.52	€6.22	12.6%	€7.65	22.9%
Under 14 - Under 18	€6.12	€5.68	-7.1%	€7.61	33.9%
Overall	€5.82	€ 6.17	6%	€7.63	23.6%

The percentage increases from the 2019 and 2015 analysis demonstrate a higher level of appreciation of the outputs of children's participation in regular activity and the associated social, physical and sports benefits. It is also worth factoring the economic climate in the context of when the period of research started in 2011 versus the economic conditions of 2019.



## SECTION FOUR

# UNDERAGE PLAYERS RESEARCH





# Munster Council G.A.A. Return on Coaching Investment

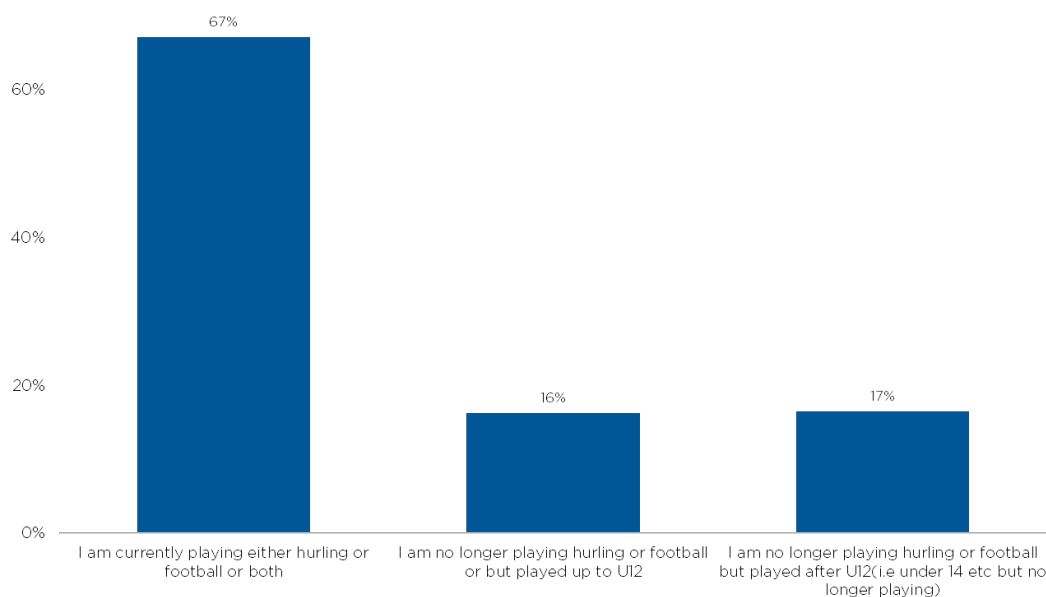
## 4.1 PLAYER RESEARCH OVERVIEW

A programme of research was conducted among post primary students across the province, largely concentrated on transition year students. The primary focus of the research was to establish the value players place on GAA activity. The research also gathered the views of underage players on opportunities to improve their experience in GAA activity while also examining the opinions of former underage players who no longer take part in GAA activity.

The research was conducted among a representative sample of Transition Year students across the province to achieve a mix of currently active GAA players and lapsed players.

## 4.2 GAA AND SPORT PARTICIPATION PROFILE

Figure 4.2.1: Current participation levels in GAA activity by respondents



Over two thirds of respondents currently playing either hurling or football or both codes. 17% of those who participated in the research stated that they were no longer playing hurling or football but had played to an age grade after under 12. A total of 16% of respondents no longer play either codes but had played up to under 12.



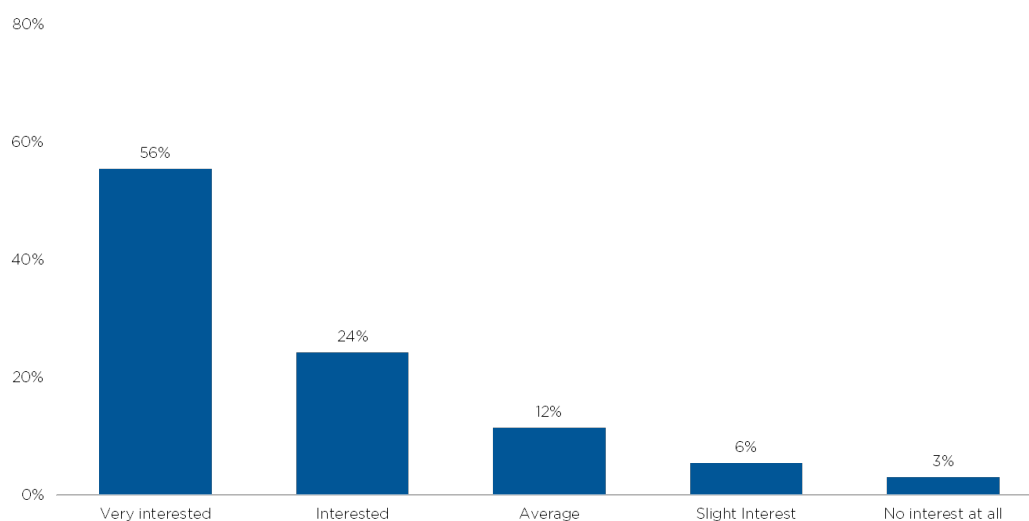
## Munster Council G.A.A. Return on Coaching Investment

CSPPA 2018 - Range of Community Sports (Participated in during last 12 months)<sup>1</sup>

Community Sport	Primary			Post Primary		
	Boys	Girls	All	Boys	Girls	All
Soccer	55%	16%	33%	43%	12%	26%
Gaelic Football	<b>38%</b>	30%	34%	<b>39%</b>	26%	32%
Dance	2%	23%	14%	2%	22%	13%
Camogie/Hurling	<b>25%</b>	19%	21%	<b>21%</b>	16%	18%
Basketball	13%	9%	11%	12%	10%	10%
Athletics	8%	11%	10%	9%	12%	11%
Rugby	20%	4%	11%	12%	4%	8%
Handball	2%	2%	2%	4%	2%	3%

The Munster Council GAA research undertaken in 2015 and 2019 among post primary students each reflect a response level consistent with the national studies examining post primary boys participation in GAA activity. The post primary boys data suggests 60% participation. The survey sample was 67% who are still participating. In the 2011, this level of participation was 68% reflecting a very representative survey sample among second level students across the province.

Figure 4.2.2: Respondents interest level in sport



In order to determine the general level of interest in sport among the survey participants, a number of profile questions assessed current interest levels in sport, interest in the GAA

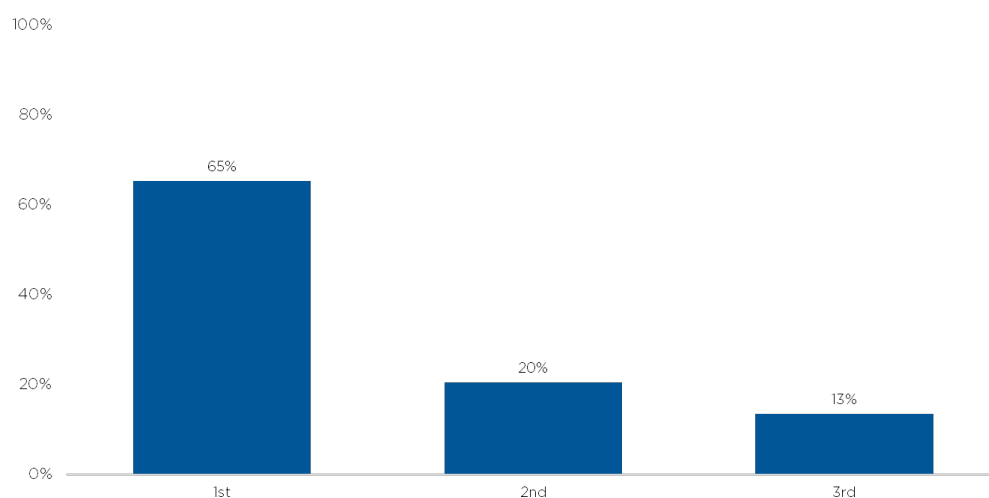
<sup>1</sup> Sport Ireland - Children's Sport Participation and Physical Activity Study 2018 (CSPPA 2018).



## Munster Council G.A.A. Return on Coaching Investment

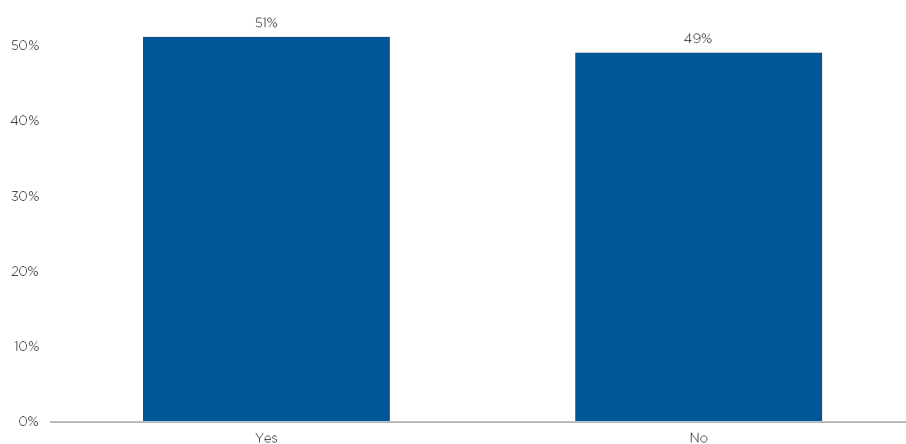
versus other sports and level of sport participation. Over half (56%) stated that they were 'very interested' in sport while under a quarter of respondents (24%) said they were 'interested' in sport. Only 9% indicated a slight or no interest in sport.

Figure 4.2.3: Rating of interest of GAA versus other sports - state if the GAA is your 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> choice sports activity



Almost two thirds of survey respondents who participate in GAA stated that Gaelic games were their first preference sport compared to other sports while 20% rated it as their second preference. Just over half of the respondents participate in other team sports.

Figure 4.2.4: Do respondents take part in other team sports







## Munster Council G.A.A. Return on Coaching Investment

### 4.3 PLAYER SROI VALUATIONS

Table 4.3.1: Players valuation of sport, non-sport and GAA participation

Activity	2015	2019
Average amount teenagers are willing to pay for one hours exercise or sports activity		
U14	€3.84	€5.11
U16	€5.12	€4.77
Minor	€5.47	€4.96
Overall Average	€4.97	€4.87
Average amount teenagers are willing to pay for one hours entertainment for a non-sporting activity		
U14	€6.14	€7.57
U16	€6.19	€6.39
Minor	€7.44	€7.36
Overall Average	€6.72	€6.88
How much do you value one hours coaching delivered through your GAA club		
U14	€4.20	€6.14
U16	€4.82	€4.06
Minor	€5.32	€4.31
Overall Average	€4.84	€4.21

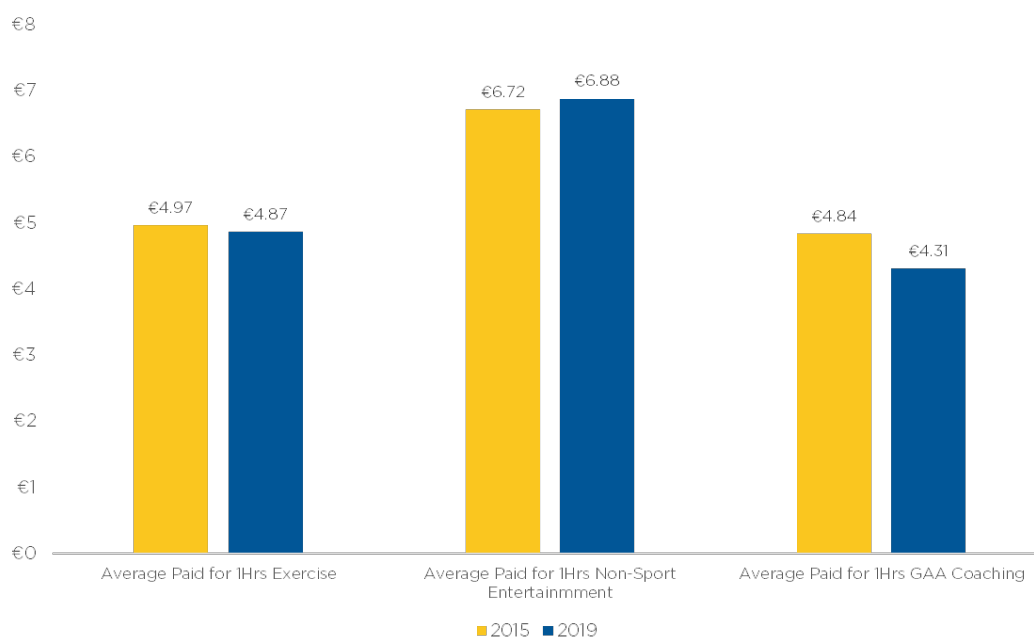
A similar valuation methodology as used among parents was employed for players to assess their valuation of GAA activity in comparison to their parents' views. The research followed the same willingness to pay methodology assessing the same categories i.e. an hour's exercise in a sport activity and in a non-sport activity. Further analysis was also undertaken with current players on the value they place on one hours coaching delivered through their GAA club.

The overall average that parents indicated they were willing to pay for one hour of exercise for sports activity was €4.87. This is largely consistent with the 2015 value of €4.97. There was drop in the value per hour among the under 16 and Minor categories across the 2015 and 2019 studies. The overall average amount teenagers stated they were willing to pay for an hour's entertainment for a non-sporting activity was also consistent with previous research. In 2019 the average amount they were willing to pay was €6.88 compared to €6.72 in 2015.



## Munster Council G.A.A. Return on Coaching Investment

Figure 4.3.2: Overall comparison of player values 2015 - 2019



The pattern of responses is also largely consistent when teenagers' value of an hours coaching delivered through the GAA was examined. The overall average in 2019 was €4.31 compared to €4.84 in 2015. Similar to the amount teenagers are willing to pay for an hour's exercise or sport activity, the biggest drop in values was among the respondents who play at under 16 and Minor levels. The research did highlight a consistency with previous research in relation to the willingness of teenagers to pay for non-sport entertainment placed at a higher level than sport or GAA activity. The gap between the parental value of non-sport and GAA activity has closed over the 2011-2019 period. In contrast, this value gap among teenagers remained largely consistent reflecting a possible set of different values and outputs in contrast to parents.

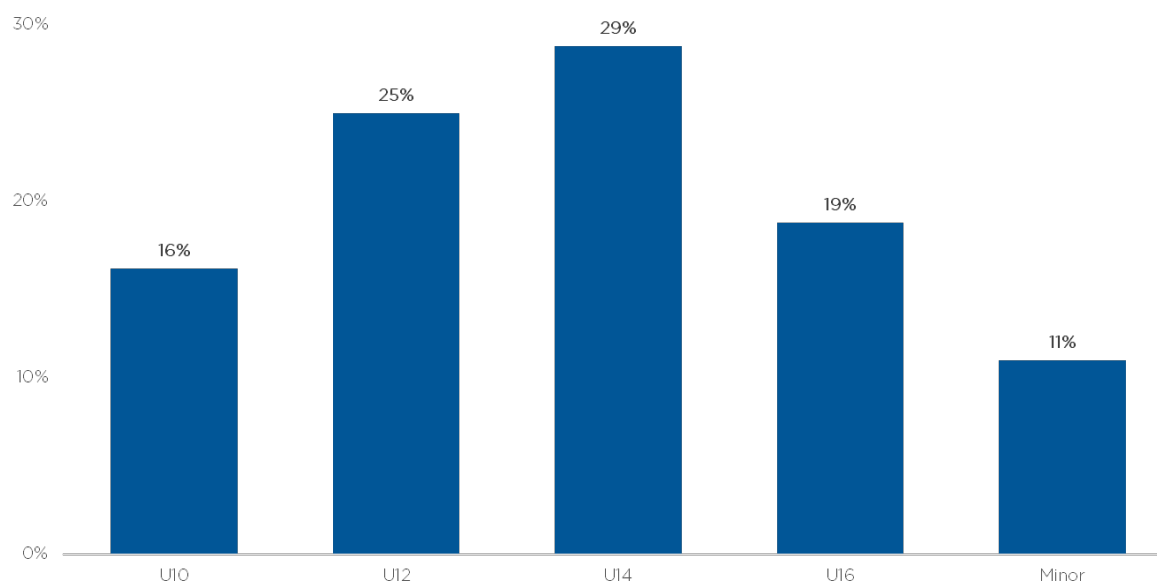


## Munster Council G.A.A. Return on Coaching Investment

### 4.4 LAPSED PLAYER FEEDBACK

The research took the opportunity to assess the reasons why teenagers who no longer participate in GAA activity stopped playing. Participants who initially indicated that they no longer play GAA were invited to complete a range of questions to determine the key factors influencing their decision to finish an involvement with the GAA.

Figure 4.4.1: When respondents who no longer play stopped participating in GAA activity

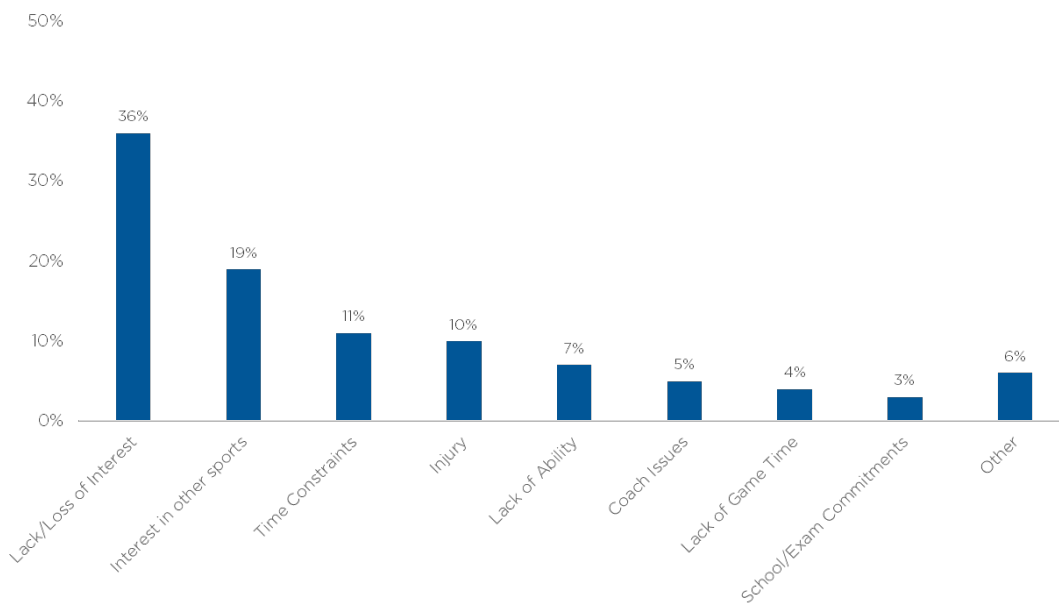


The highest level of drop off from GAA activity was at under 14 level with 29% stopping at this age rate. A quarter of respondents stated that they finished playing at under 12 with 16% stopping at under 10 level. 30% of respondents had stopped at either under 16 or Minor level.



## Munster Council G.A.A. Return on Coaching Investment

Figure 4.4.2: Respondents reasons for stopping playing GAA

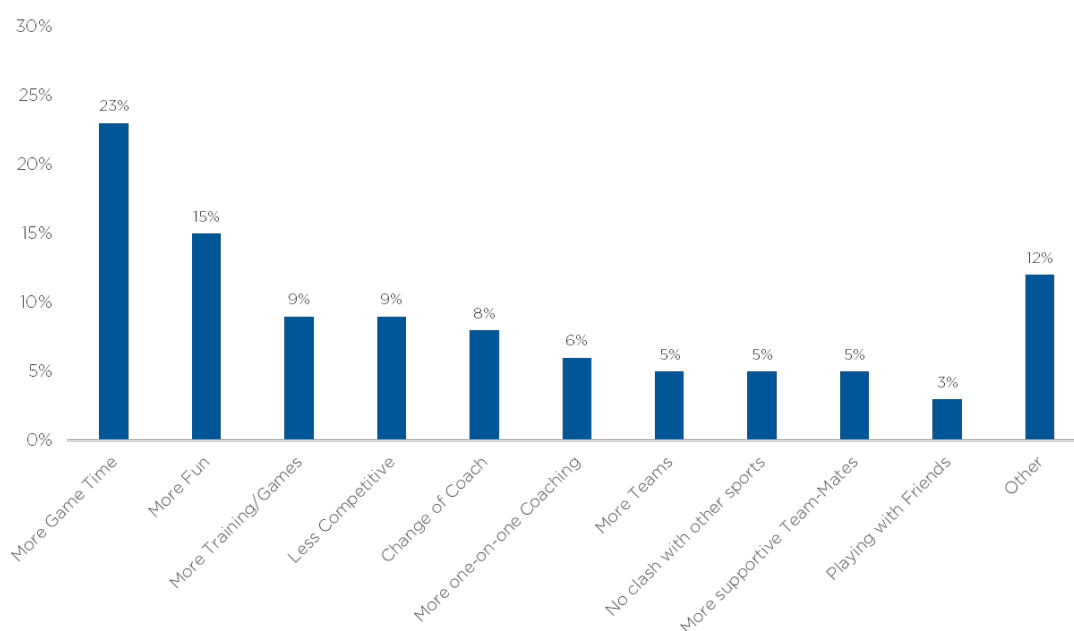


The lack of interest among respondents was the main reason for finishing with GAA activities mentioned by 36% of respondents. Almost one in five respondents pursued their interest in other sports while 11% mentioned time constraints as the main reason why they stopped participating in GAA activity.



## Munster Council G.A.A. Return on Coaching Investment

Figure 4.4.3: Lapsed players suggestions to retain players longer



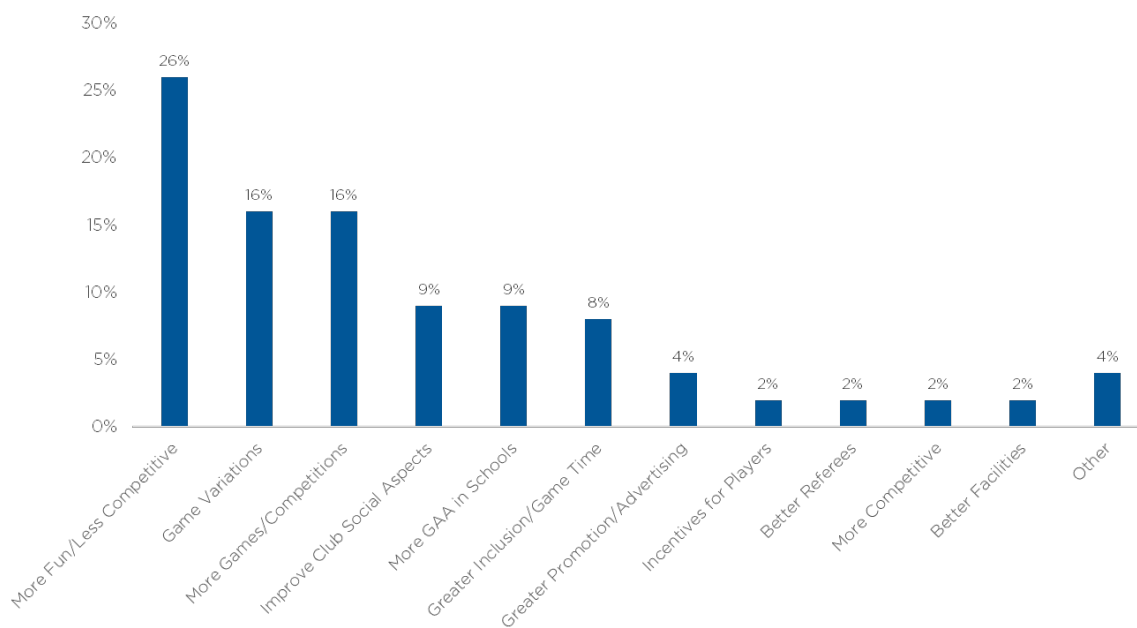
Almost a quarter of respondents suggested more game time for players to retain more players as they progressed through the age groups. 15% suggested more fun attached to playing the games. 9% of respondents suggested making the participation less competitive while a similar percentage suggested more training and games. Despite only 4% of respondents mentioning a lack of game time as the reason that they had stopped GAA activity, it attracted the highest level of recommendations among lapsed GAA players.

Coaching structures and coach personalities were mentioned as additional factors. A change of coach was suggested by 8% while 6% suggested more one on one coaching in order to develop them as players.



## Munster Council G.A.A. Return on Coaching Investment

Figure 4.4.4: Current players suggestions to retain more players



Survey participants who continue to play GAA were invited to submit their ideas on how to retain more players within the GAA. Over a quarter recommended less competitive structures and more fun element to games participation with a further 16% suggesting the introduction of variation in the way games are played. A similar percentage suggested more games and competitions to give more playing time. Additional replies advocated an increased social focus in GAA participation and more involvement through second level schools structures.





## SECTION FIVE COACHING RETURN ON INVESTMENT





## Munster Council G.A.A. Return on Coaching Investment

### 5.1 OVERVIEW

The overall methodology employed is designed to create a valuation of the total Munster Council GAA games development activity. This investment is the catalyst for clubs, schools and games activities generating significant volumes of sport and physical activity across the province on a weekly basis. The objective is to determine the overall coaching return on investment from the annual financial inputs of Munster Council GAA. This is measured through assessing hourly outputs in terms of levels of participation measured with the value stakeholders place on the coaching investment.

As detailed in the previous sections, the volume of outputs are significant. Each of these measured outcomes contribute to the overall return on investment analysis. This is estimated based on the calculation of the total games and coaching outputs through the various provincial structures combined with the value derived through Munster Council GAA games development activity.

The operational framework of GAA clubs, schools and Games Development personnel across the six counties are responsible for the generation of the hours of GAA outputs. These are the coaching and playing hours 'consumed' by underage players. The associated value identified through the primary research among clubs and parents highlights the growing volume of participation opportunities being embraced by players i.e. increased levels of uptake of training and games.

### 5.2 PLAYING TIME GENERATED

The return on investment model is devised using the values associated with the GAA outputs and the weekly and season long provision of participation opportunities across clubs, schools and games development activities. The research of the provincial clubs provides the basis for weekly participation opportunities i.e. training and matches / blitzes. The additional provincial Games Development activity stimulates additional waves of playing opportunities in primary and second level schools.

Almost 2,900 weekly underage training sessions are held across the province during the playing season generating 3,900 hours of G.A.A. coaching time for underage players each week. This represents an increase of 1% from 2015.

Munster GAA activity in schools is responsible for the generation of 1.48 million playing hours of activity across primary schools through Go Games coaching and blitzes



## Munster Council G.A.A. Return on Coaching Investment

Table 5.2.1: Players attendance of available training sessions organised by their club

% of Sessions Attended	2015	2019
0-10%	5%	0%
11-20%	2%	1%
21-30%	2%	2%
31-40%	3%	2%
41-50%	2%	6%
51-60%	6%	7%
61-70%	6%	10%
71-80%	22%	17%
81-90%	24%	30%
91-100%	28%	24%

The increasing levels of participation among underage players in available training sessions is illustrated above with 72% of players taking part in 70% or more of all training and coaching sessions hosted by clubs. This level of participation accounts for the generation of player sessions e.g. one player attending two training sessions in a week is responsible for generating two player sessions that week. This is developed based on a player's season attendance at all available sessions estimated by parents in order to estimate the overall attendances per age group.

Table 5.2.2: Estimated player sessions per season (training, match/blitz participation)

Age Group	2019	2019
	No. of Registered Players per Age Category	No. of Player Sessions per Season
U8	14,060	386,365
U10	10,416	412,835
U12	10,478	484,121
U14	9,059	368,701
U16	7,800	308,880
U18	6,725	191,663

The total playing / training time generated by Munster clubs was 2.15 million hours in 2019. This is based on weekly training sessions and games activity provided across all age groups.



## Munster Council G.A.A. Return on Coaching Investment

### 5.3 VALUING GAA PARTICIPATION

As detailed in previous sections, primary research was conducted among parents and players to determine the value they place on participation in GAA activities. The research sample included 464 parents and 674 teenagers distributed across the province.

Table 5.3.1: Parental values and coaching Return on Investment

Activity	2019
<b>Average cost of activities that parents currently pay for one hour of children's activities</b>	€ 9.16
<b>Amount considered fair by parents to pay for an hours exercise to gain desired benefits</b>	
Under 8 - Under 12 (value based on age profile of respondents children)	€ 7.90
Under 14 - Under 18 (value based on age profile of respondents children)	€ 8.60
<b>Overall</b>	€ 8.03
<b>Amount considered fair to pay for one hours activity in a non-sports activity</b>	
Under 8 - Under 12 (value based on age profile of respondents children)	€ 7.82
Under 14 - Under 18 (value based on age profile of respondents children)	€ 8.34
<b>Overall</b>	€ 7.97
<b>Value placed by parents on one hours coaching delivered by a G.A.A. club</b>	
Under 8 - Under 12 (value based on age profile of respondents children)	€ 7.65
Under 14 - Under 18 (value based on age profile of respondents children)	€ 7.61
<b>Overall</b>	€ 7.63

Parents value one hours GAA coaching and playing activity at €7.63 per hour. Parents of 'Go Games' U8 - U12 players placed an average value of €7.65 while U14s to minor placed an average value of €7.61 per hour.

Based on average club membership fees for underage players, parents are receiving €9.61 value (return on investment) for every euro of annual GAA membership they pay. In contrast parents are receiving a lower return on investment from non GAA activities. Based on parental values reviewed, the average return of investment for non GAA activities is €9.16 for each euro spent.



## Munster Council G.A.A. Return on Coaching Investment

The lifetime value of a child's participation in GAA activity from under eight to minor is €4,150 per player. This equates to the value generated per player who stays involved in underage GAA activity and represents a multiple of the annual GAA club membership they pay i.e. typically nine times the value of the club membership they pay.

Players who demonstrate a high level of interest in GAA activity will typically attend up to 460 training and playing sessions from the start of their underage career to when they complete playing at minor level.

The average value parents associate with a season of coaching and games from a Go Games player U8-U12 is €349 while parents of players U14 to minor value a season at €342 per player.

Underage Players value one hour coaching delivered through the GAA at €4.21 per hour. Under 14s value one hour GAA coaching at €6.14 while players under 16 attach a value of €4.06 per hour and €4.31 for minor players. These figures are largely consistent with the data obtained through player research conducted in 2015.

### 5.4 COACHING RETURN ON INVESTMENT - 2019

The following represents the approach adopted to estimate the overall coaching return on investment impact. The total value generated is comprised of the following elements assessed versus the total investment in coaching and games development by Munster Council GAA

#### 1. Clubs

Training and coaching sessions in clubs calculated from:

- Total number of registered players at each age group as provided by Munster Council GAA.
- 366 responses received to club survey representing 87% of provincial clubs.
- Data provided by clubs on the number of training sessions held per week at each age group.
- Parents survey indicated the percentage of training sessions attended by their child.





## Munster Council G.A.A. Return on Coaching Investment

### 2. Schools – Coaching Programmes

Participation levels in schools programmes derived from:

- The total number of player contact hours derived from data supplied by Munster Council GAA on the numbers of students participating and number coaching session undertaken.

### 3. Schools – Go Games

- The total number of player contact hours derived from data supplied by Munster GAA on student participation in in 5+ hurling and football blitzes organised in schools in the province.

### 4. Munster Games Development Programmes (Club Go Games)

- The number of children participating in 5+ Go Games Club blitzes as supplied by Munster Council GAA.

### 5. National Go Games Week (Munster Council GAA Activity)

- The number of children participating in National Go Games Week and Croke Park Activity Days provided by Munster Council GAA.

### 6. Development Squads

The total number of player contact hours derived from:

- Number of hurling and football squads and players provided by Munster Council GAA attending an average of 16 sessions per season.

### 7. Total Value Generated

- Application of the Hourly Value Parents place of GAA Participation at Under 12's and Under 14 – Under 18 age groups determined through the parents survey to the total number of hours calculated through each of the areas supported through Munster GAA games development.





## Munster Council G.A.A. Return on Coaching Investment

### 8. Total Games Development Investment

- The amount invested in games development as provided by Munster Council GAA.

### 9. Return on Coaching Investment

- The value generated by every euro of investment into coaching and games development, calculated by dividing the Total Value Generated by the Total Games Development Investment.

Table 5.4.1: Summary of coaching Return on Investment – Munster Council GAA

	€
1. Clubs	€16,330,000
2. Primary Schools - Coaching Programmes	€11,440,000
3. Secondary Schools - Go Games	€135,000
4. Munster Games Development Programmes (Go Games & Club Coaching)	€1,480,000
5. National Go Games Week (Munster Council GAA Activity)	€51,000
6. Development Squads	€0.329 million
7. Total Value Generated	€29,762,000
8. Total Games Development Investment	€1,770,000
9. Return on Coaching Investment	€16.81

In addition to the value generated through the clubs the overall value assessment includes the value generated by the Games development activities in schools and Go Games activity. Some of the key outputs include a total of 862,460 player contact hours are generated by Munster GAA coaches through the Go Games coaching programme in primary schools generating a value of €6.6 million.

Munster GAA activity in schools is responsible for the generation of 1.51 million playing hours of GAA activity across primary schools through Go Games coaching and blitzes.

There are 649 primary schools with hurling Go Games blitz programmes with 47,429 players. The average number of blitzes played by a player is 5.

There is a total of 770 primary schools with football Go Games blitz programmes with 60,378 participants. The average number of blitzes played by a player is 4.

There is a total of 1,056 primary and secondary schools receiving Go Games coaching programmes with 84,359 participants.



## Munster Council G.A.A. Return on Coaching Investment

The value of total schools activity between schools Go Games and Blitzes across hurling and football is €11.4 million accounting for 1.49 million hours of Gaelic Games contact in the province.

The overall value created through clubs, schools and games development activities is €29.76 million. When assessed against the annual investment of €1.77 million by Munster Council GAA, the return for each euro of coaching investment is €16.81 i.e. each euro invested generates of multiple of almost €17 in value generated.

This represents an overall increase of coaching value from €26 million in 2015 to €29.7 million in 2019. Since 2011 this annual value has increased by almost €10 million through increased level of participation and an increasing value placed on GAA activity by parents. The corresponding return on investment ratio has also increased from €15 to €17 for each euro invested into the provincial coaching structures. Since 2011, this ratio has risen from €12 to €17 reflecting the increased parental value and the associated increase in coaching, training and participation opportunities for juvenile players across the province.



## SECTION SIX

# RESEARCH CONCLUSIONS





## Munster Council G.A.A. Return on Coaching Investment

### 6.1 INCREASED COACHING RETURN ON INVESTMENT

The research represents the third undertaking of coaching return on investment analysis by Munster Council GAA. The value generated by every euro of investment into coaching and games development has increased annually from an initial value of €12 to €17.

Table 6.1.1: Comparison of coaching Return on Investment - 2011 to 2019

Year	Annual Coaching Investment	Coaching Value	Return on Investment Ratio
2011	€1.64 million	€19.7 million	€12:€1
2015	€1.72 million	€26.3 million	€15:€1
2019	€1.77 million	€29.7 million	€17:€1

The overall coaching value in 2019 of €30 million has risen €4 million in the past four years and €10 million since 2011. Despite the slight decline in playing numbers in 2019, the playing outputs of clubs and the games development activities have risen. This increase is due to a higher volume of training sessions provided across the province compared to 2015. The research has also demonstrated a higher level of regular participation among players with 72% of all registered players taking part in 70-100% of available training sessions. The volume of playing activity is estimated through player participation in the available sessions provided by the club. The number of player sessions generated annually has risen from 1.8 million sessions in 2011 to a total of 2.2 million sessions across the province in 2019. The participation pattern among underage players demonstrates the demand profile for training and playing activity remains strong. Equally the parental value associated with these GAA outputs have also increased contributing to an increase in the overall coaching value produced by Munster Council GAA.

### 6.2 INCREASED STAKEHOLDERS VALUATION OF GAA ACTIVITY

One of the most significant patterns that emerged in the research is the growth in the willingness to pay valuations by parents and the growth in values parents suggest is the closest match to the value of a GAA training session. Since the research began in 2011, the majority of valuations were associated with lower value activities i.e. less than €5. In the 2019 analysis, this pattern has almost reversed completely with a significant increase in the values parents now place on their child's participation in GAA activity e.g. matching the values of non sport activities in excess of €5.

Similarly, the specified value parents are willing to pay for non-sport activity has increased. Notwithstanding the contrasting economic environment between 2011 and 2019, the analysis consistently reflects a higher valuation of physical activity and GAA participation. Double digit percentage increases are evident across all areas examined.



## Munster Council G.A.A. Return on Coaching Investment

Table 6.2.1: Comparison of parent's willingness to pay - 2011 to 2019

Year	Average Hourly Cost Parents Pay for Children's Activities	Hourly Value Parents place of GAA Participation	Difference (€)
2011	€7.90	€5.82	€2.08
2015	€8.11	€6.17	€1.94
2019	€9.16	€7.63	€1.53

More specifically, the overall hourly value parents associate with GAA activity in 2019 has risen to €7.63 per hour from the 2011 value of €5.82. When discounted to account for the annual time differential the 2011 and 2019 figures are very similar reflecting a robustness around the valuations of GAA activity among parents. Equally significant is the closing of the value differential between the amount of money parents typically pay for one hour of children's activities and the value of an hour of GAA activity. In 2011, the average costs paid by parents for an hour of children's activities was €7.90 while an hour of GAA activity was valued at €5.82 (value difference of €2.08). In 2015 the value difference between the two parental valuations was €1.94. In 2019, parents estimate the average cost of what they pay for children's activities at €9.16 per hour. Assessed against the hourly GAA value of €7.63 the value difference is now reduced to €1.53. This indicates the perceived value of GAA activity versus a market traded service or activity parents currently pay for is closing. It is evident from the values and reducing value difference, there is a greater appreciation of the wider benefits of GAA participation. The prioritisation of desired outputs among parents focused on the health and social benefits of GAA activity. The closing value gap highlights an increased level of awareness of the wider benefits beyond sports skills and the focus on the 'whole of the player' outcomes delivered through the GAA.





## Munster Council G.A.A. Return on Coaching Investment

Table 6.2.2: Summary of 2011 - 2019 coaching return on investment values

Activity	2011	2015	% Change	2019	% Change
Average cost of activities that parents currently pay for one hour of children's activities	7.90	€8.11	2.6%	€9.16	12.9%
Amount considered fair by parents to pay for an hours exercise to gain desired benefits (value based on age profile of respondents children)					
Under 8 - Under 12	€5.90	€ 6.25	5.9%	€ 7.90	26.4%
Under 14 - Under 18	€ 6.60	€ 6.48	-1.8%	€ 8.60	32.7%
Overall	€ 6.27	€ 6.34	1.1%	€8.03	26.7%
Amount considered fair to pay for one hours activity in a non-sports activity (value based on age profile of respondents children)					
Under 8 - Under 12	€5.76	€ 6.41	11.2%	€7.82	21.9%
Under 14 - Under 18	€ 6.50	€ 6.88	5.8%	€8.34	21.2%
Overall	€ 6.13	€ 6.49	4.2%	€ 7.97	22.8%
Value placed by parents on one hours coaching delivered by a G.A.A. club (value based on age profile of respondents children)					
Under 8 - Under 12	€ 5.52	€ 6.22	12.6%	€ 7.65	22.9%
Under 14 - Under 18	€ 6.12	€5.68	-7.1%	€ 7.61	33.9%
Overall	€ 5.82	€ 6.17	6%	€ 7.63	23.6%

### 6.3 CHALLENGES OF PLAYER RETENTION

The challenge of player retention is not unique to the GAA. The evidence of national studies<sup>2</sup> (Sport Ireland - Children's Sport Participation and Physical Activity Study 2018) suggests the level of participation at post primary school age has reduced by 6% points from 64% in 2010 to 58% in 2018.

The research undertaken among clubs and second level students reflects the player registration profile with reducing player numbers evident at each subsequent age category. The average fall-off in player numbers from the 2011-2019 analysis is 46%, with the differential being highest in the 2019 period of review. While the review does not track individual player retention, the figures are illustrated to highlight the differences between the entry level age groups compared to the older age groups with less players still active in Gaelic Games as they get older.

<sup>2</sup> Sport Ireland - Children's Sport Participation and Physical Activity Study 2018 (CSPPA 2018).





## Munster Council G.A.A. Return on Coaching Investment

Table 6.3.1: Overview of annual registered playing numbers by age category

Age Group	2011		2015		2019	
	Players	% Participation Decline	Players	% Participation Decline	Players	% Participation Decline
Under 8	12,349		13,434		14,060	
Under 10	11,333	-8.3%	10,129	-24.6%	10,416	-25.9%
Under 12	10,431	-8.0%	10,691	5.5%	10,478	0.6%
Under 14	9,241	-11.4%	9,898	-7.4%	9,059	-13.6%
Under 16	7,849	-15.1%	8,852	-10.6%	7,800	-13.9%
Under 18	7,039	-10.3%	7,784	-12.1%	6,725	-13.8%
U8 - U18		<b>-43.0%</b>		<b>-42.1%</b>		<b>-52.2%</b>

The reduction in player numbers is more evident at the under 12 and u14 age categories, largely coinciding with the progression from primary to second level education. The introduction of competitive games structures is also a factor at these age groups, possibly leading to less game time for some players. The feedback from teenagers who no longer participate in GAA activity suggests more playing time and variety in games delivery should be considered in order to retain higher numbers. Clubs and second level student feedback confirmed the key challenges remained around competition from other sports, however, they equally recognised the need for a different approach to some games delivery in order to reduce the numbers no longer taking part in GAA activity.

Table 6.3.2: Overview of age group at which players stopped playing 2019 (based on second level student feedback)

Age Respondents Stopped Playing	2015	2019
Under 10	17%	16%
Under 12	29%	25%
Under 14	25%	29%
Under 16	24%	19%
Under 18	4%	11%

### 6.4 CAPACITY FOR FURTHER GROWTH THROUGH VOLUNTEERS

The successful delivery of training and games activity is based on the strength of the volunteer base throughout the province. Each of the coaching return on investment studies revealed a mentor and coaching base in Munster in excess of 10,300. Since 2011, the average number of mentors per club associated with underage teams has increased from 20 to 25. Despite this level of growth, it remains an operational challenge for clubs in attracting new coaches and mentors.

Many of the recommendations received from clubs and post primary players require additional personnel to create the desired delivery. Clubs have consistently highlighted the



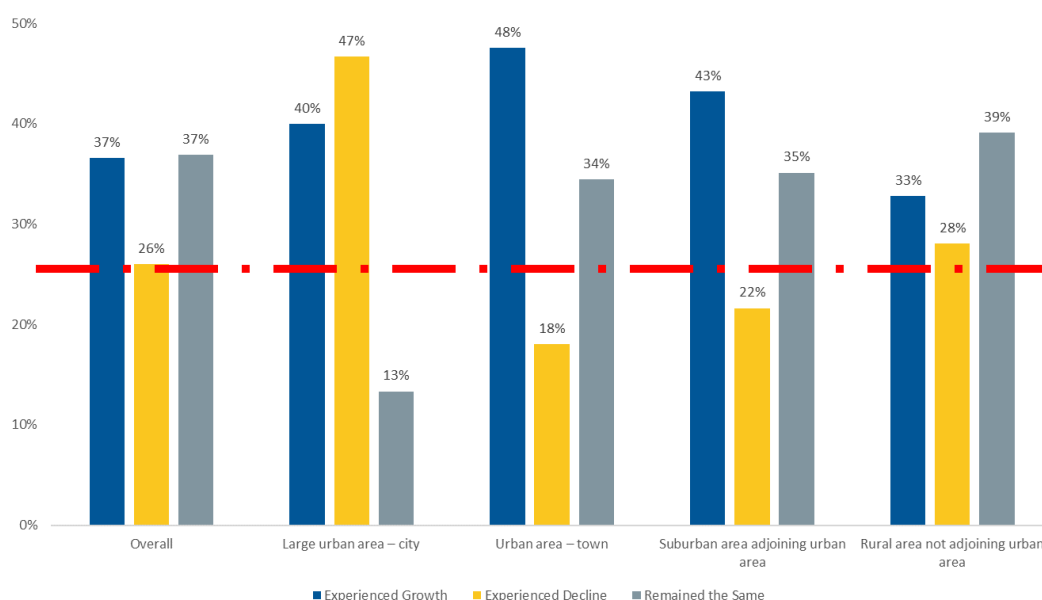
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difficulty in attracting new volunteers to become involved in mentoring and coaching. One of the most significant emerging factors in attracting new people into the club is parental interference and pressure on mentors. This has increased from a baseline of 3% to 11% as a significant deterrent in people becoming involved. Aligned with this issue, according to clubs, is the lack of confidence among some potential in their ability to get involved due to coaching expectations. The ability to continue to grow the outputs of the GAA, evident over the course of the 2011-2019 studies, will be restricted in the absence of a new approach to volunteers and reinforcing the participation ethos at certain age grades that are vital gateway grades to engage with parents to consider their participation in mentor and coaching roles.

## 6.5 MANAGING A CHANGING PLAYING BASE

The composition of the provincial playing base comprised of a changing urban and rural demographic highlights the challenges many clubs face from accommodating growing numbers to dealing with declining pools of players. The clubs research highlighted a significant number of city clubs experiencing a decline in their playing numbers. Rural clubs also experienced an above average rate of decline. This trend is further supported by the slight fall in the number of clubs from the 2015 level of 430 to 422 in 2019.

Figure 6.5.1: Changing player base by geographic area



Based on the geographic location e.g. urban versus rural, urban areas and their hinterlands all experienced growth with urban towns recording the highest level of growth (48%



## Munster Council G.A.A. Return on Coaching Investment

compared to the overall average of 37% growth). Rural areas have experienced the lowest levels of growth over the past three years with 33% of clubs stating they had recorded an increase in underage playing numbers compared to the overall average of 37%.

Rural areas also recorded the second highest level of a decrease in playing numbers. City clubs however recorded the highest level of decline in playing numbers with 47% of clubs located in cities recording a decrease in playing numbers compared to an overall average of 27%. Aligned with this urban playing base challenge is an acknowledgment among urban clubs around the difficulty in attracting volunteers. Analysis of the responses to the research on ease of attracting volunteers demonstrates a changing dynamic among large urban or city clubs. The challenge to grow participation levels is mirrored by the need to attract greater numbers of volunteers, mentors and coaches to create the environment to attract and retain players.



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### 6.6 WEEKLY IMPACT OF NO PLAYING ACTIVITY

The annual value generated through Munster Council GAA activities is almost €30 million rising from €26 million in 2015. The recent Covid-19 crisis has resulted in an increased appreciation of sport in society and the wider social, community and physical impact the GAA generates. The restrictions imposed across the country resulted in a complete cessation of juvenile and adult games activities. In order to determine the value lost to the GAA community in terms of hours of activity and the associated value, analysis of the weekly outputs was conducted.

An assessment was undertaken on the weekly impact of no playing activity taking place at clubs in the province. The assessment was based on examining one week during the 'lockdown' period in April following the Easter break. This is a point in time according to the clubs research that all clubs would have resumed training across all age categories in preparation for the 2020 playing season.

• Weekly Number of training sessions	-	2,883
• Weekly Number of coaches / mentors engaged	-	10,300
• Weekly Player Contact Hours Lost	-	80,539
• Weekly Coaching / Mentors Hours Lost	-	15,733
• Parental Valuation of loss of club GAA activity per week	-	€610,337
• Player's <sup>3</sup> Valuation of loss of club GAA activity per week	-	€336,885

Based on parental valuation of their children's participation in GAA training and playing, the weekly value of lost activity is €610,337. This is based on the total number of weekly hours generated through Munster Council GAA structures and the weekly rates among the overall player pool of 58,000 juvenile players. The volunteer base of 10,300 helps to deliver 15,733 coaching hours each week across the six provinces. Adopting the underage players valuation of their GAA participation, the weekly value of lost activity is €336,885 per week.

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<sup>3</sup> Valuation based on the overall average placed by students on one hour of GAA coaching applied across all age groups from U8 to U18.



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