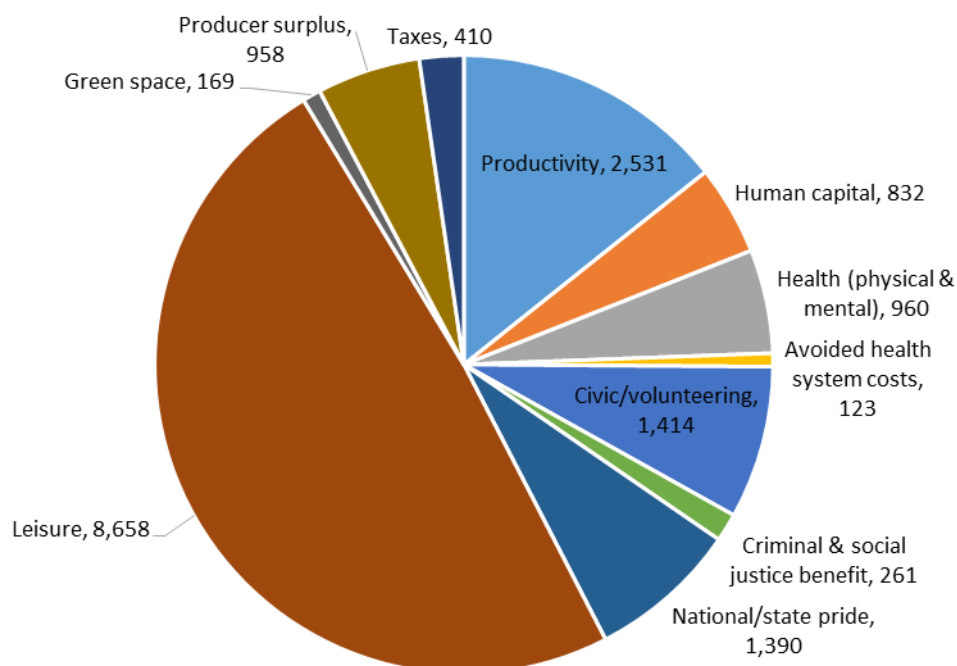


Summary

Sport and active recreation provide large benefits to Queenslanders, through various economic and social channels. Total economic and social benefits are estimated to be in the order of \$18 billion, an amount equivalent to around 5% of Gross State Product (GSP) (Figure 1).

Figure 1. Benefits of sport and active recreation in Queensland, 2018-19, \$ million



Source: Adept Economics estimates, 2019.

The sport and active recreation sector directly and indirectly supports economic activity and jobs across Queensland. Sport and active recreation are estimated to make an economic contribution of around \$5 billion per annum, or nearly 1½ % of GSP (Table 1).

Table 1. Economic contribution of sport and active recreation in Queensland

Category	Direct industry value added (\$M)*	Total industry value added (\$M)	Share of GSP (%)	Direct employment	Total employment	Share of total employment (%)
Sports & active recreation	1,891.2	4,665.4	1.30	30,343	61,869	2.44
Sports & active recreation-related tourism	168.1	334.3	0.09	3,616	5,590	0.22
Total	2,059.3	4,999.7	1.39	33,959	67,459	2.66

Source: Adept Economics estimates as detailed in this report. Note: Direct refers to value added and employment directly attributable to sport and active recreation and does not include indirect (flow-on or multiplier) contributions. The "Total" columns include both direct and indirect contributions.

The sport and active recreation sector directly supports the employment of around 34,000 Queenslanders and, directly and indirectly, of over 67,000 Queenslanders, or 2½% of all employed people.

It is evident that sport and active recreation make a substantial contribution to the Queensland economy and provide immense benefits to Queenslanders through a wide range of channels, including health, civic benefits, green space, leisure and national and state pride, among others.

Comparisons with other sectors

Directly, sport and active recreation (and related tourism) employ around 34,000 Queenslanders, or around 25,100 in full-time equivalent (FTE) terms. This contribution can be compared with, say:

- 19,300 people employed as baristas or bar attendants (or 12,300 FTEs)¹;
- 9,100 FTEs directly employed in sugar manufacturing²; or
- around 4,200 FTEs directly employed in the Queensland racing industry, according to figures published by Racing Queensland.³

So the sector makes a substantial contribution to Queensland employment and the economy and hence warrants attention from policy advisers and decision makers.

Benefits and contributions by sub-sector

The sport and active recreation sector is made up of four distinct sub-sectors, notably:

- **Sport**—i.e. organised sporting activities, both professional and amateur, including e.g. netball, cricket, the different football codes, athletics, basketball, lawn bowls, etc.;
- **Fitness**—i.e. gyms, personal trainers, yoga studios, etc.;
- **Outdoor recreation**—i.e. bushwalking, hiking, camping and other outdoor activities, including the growing activity of adventure tourism; and
- **Community recreation**—i.e. community recreational activities organised by community groups such as PCYC and YMCA.

Economic data are not available specifically for these categories, but the relative benefits of these sub-sectors to the total benefits of sport and active recreation have been estimated using reasonable assumptions based on available data (Table 2). All sub-sectors provide annual benefits to Queenslanders valued in the billions, with sport leading the way with an annual benefit of \$9 billion.

¹ ABS, 2016 Census of Population and Housing.

² Lawrence Consulting, 2019, p. 6.

³ Racing Queensland, 2017.

Table 2. Economic benefits of sport and active recreation in Queensland, by sub-sector

<i>Sub-sector</i>	<i>Benefit (\$M)</i>	<i>% of GSP</i>
Sport	9,001	2.51
Fitness	3,364	0.94
Outdoor recreation	3,541	0.99
Community recreation	1,800	0.50
Total	17,706	4.93

Source: Adept Economics estimates as detailed in this report.

In a similar way to how the economic benefits by sub-sector were estimated, the economic contributions associated with the different sub-sectors have been calculated using reasonable assumptions (Table 3). The sport sub-sector makes the largest economic contribution to Queensland, followed by outdoor recreation, fitness and community recreation.

Table 3. Economic contribution of sport and active recreation in Queensland, by sub-sector

<i>Sub-sector</i>	<i>Industry value added (\$M)</i>	<i>Share of GSP (%)</i>	<i>Employment</i>	<i>Share of total employment (%)</i>
Sport	2,538.7	0.71	34,245	1.35
Fitness	886.4	0.25	11,755	0.46
Outdoor recreation	1,100.2	0.31	15,169	0.60
Community recreation	474.3	0.13	6,290	0.25
Total	4,999.7	1.39	67,459	2.66

Source: Adept Economics estimates as detailed in this report.