



**THE
CAMOGIE
ASSOCIATION**



A Research Baseline for Camogie

March 2024

#OurGameOurPassion



**THE
CAMOGIE
ASSOCIATION**

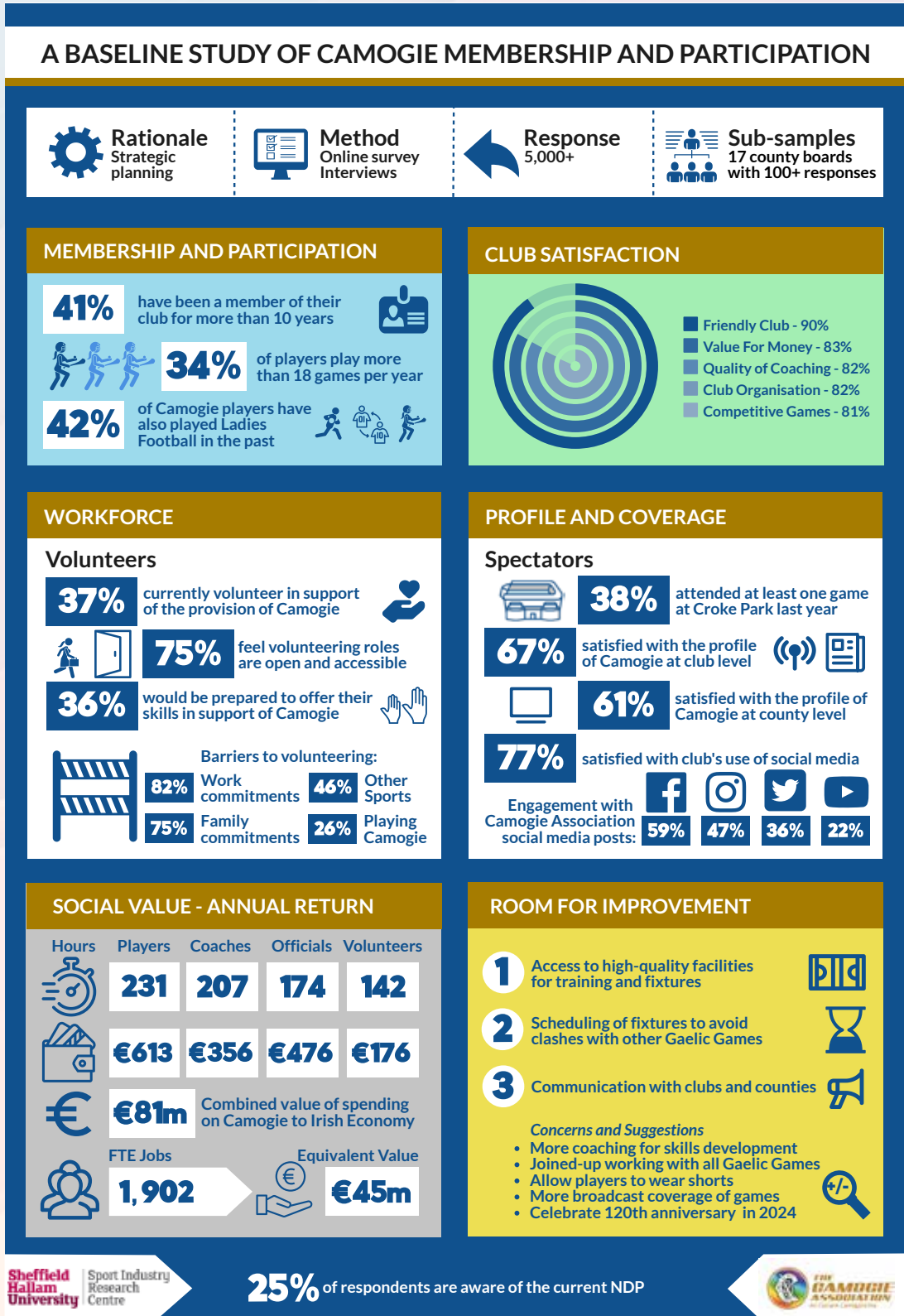
Submitted to:
Ard Chomairle An Cumann Camógaiochta.

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The infographic below highlights some of the key findings from the research study.



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Sport Industry Research Centre Acknowledgements

A chairde,

On behalf of the Sport Industry Research Centre at Sheffield Hallam University, I am pleased to present this baseline study of engagement in Camogie. This report, which has been more than a year in the making, cements the research centre's involvement interest in Gaelic Games, and has helped to deepen our understanding of their significance to the sporting and cultural landscape of Ireland. As the grandson of a keen hurler, my interest in Gaelic Games is not only professional, but personal, and I am especially proud to have made my own contribution (however small) to the Association's plans to develop the game.

The research is especially pertinent in view of the ongoing process of integration of Gaelic Games governing bodies. We are confident that the baseline established in this report establishes a benchmark in the continually evolving story of the sport of Camogie at a crucial point in the game's history. The patterns and trends identified here should reassure clubs, their members and participants, that Camogie has a sustainable long-term future if the challenges facing the sport can be met and overcome. In time, and perhaps most excitingly, the sport will be able to measure its progress by revisiting this process to establish how far the sport has progressed.

Particular credit for this research should go to Dr Paul Donnelly of Ulster University, and his volunteer colleagues



on the National Development Committee. The committee identified at an early stage the need for a comprehensive dataset to establish the current state of play in Camogie, and should be proud to have commissioned a survey with such impressive engagement from supporters of the sport. I would like to personally thank Ard Stiúrthóir, Sinead McNulty and her team, for their unstinting support in developing and distributing the questionnaire. The success of this research is due in large part to the continuous efforts of the Camogie Association's staff in promoting the survey to participants and volunteers.

Most importantly perhaps, I am exceptionally grateful to the 5,000 survey respondents, and to the stakeholders from across the sport and the broader Irish sports community who gave up their time to talk to the research team.

The Camogie Association now has access to a formidable resource which leaves it well-equipped to plan for the challenges and opportunities of the future. I wish the Association every success in its future endeavours, and look forward to seeing the game continue to grow and develop on the island of Ireland and beyond.

Is mise, le meas,

David Barrett,
*Research Fellow, Sport Industry Research Centre,
Sheffield Hallam University.*

Foreword

– Hilda Breslin, Uachtarán

On behalf of the Camogie Association, I am delighted to present “A Research Baseline for Camogie” report. I would like to thank the Sport Industry Research Centre at Sheffield Hallam University for their work, the National Development Implementation Committee and especially all of the respondents who contributed their time and insights. I would also like to thank Sport Ireland and our Ard Chomhairle for their support in commissioning the report.

The research contained within the report forms an important base for our Strategic Plan 2024-2026. This baseline study allows us to analyse our current position, identifying the starting point for our Strategic Plan and target our ambitions for the future. It will create a benchmark against which we can measure future success or progress. The challenges and opportunities identified will serve to further our ambition for women's sport for the next 120 years, our members have provided us with the road map contained within the data.

It is about our ambition, ambition for the future, determined to ensure Camogie reaches its full potential – we should never limit our ambition for our game, we should take pride in what we have and what we can achieve – the growth of our game is in our hands.

Is mise, le meas,

Hilda Breslin
Uachtarán



Foreword

– Sinéad McNulty, CEO

On behalf of the Camogie Association I am delighted to welcome the publication of this report. The 'baseline study' report which was commissioned with the support of Sport Ireland, and provides a snapshot in time of where Camogie sits in the sporting landscape, and what our members have identified as priorities for the Association in the coming years.

The Camogie Association is committed to evidence based decision making. As we prepared our strategic plan for 2024-2026, the importance of having accurate current data informed by our membership to guide the strategic direction of the Association was recognised.

The findings within this report present challenges and opportunities for our Association to deal with over the coming years. Some we knew, like the drop out of teenage girls from our sport, some which we had anecdotal evidence of and some which came as a new insight, such as the economic and social value of our sport in society.

As we celebrate our 120th anniversary in 2024 the Camogie Association stands as a unique female sports entity, from our historic foundations, through to achieving UNESCO Heritage status, and our role in the Gaelic Games family.

We operate in a competitive environment – not just on the pitch, but in the attraction of players and volunteers to our sport, growing our fan base, securing investment and sponsorship and drawing viewership through broadcast media and streaming. In this vibrant and dynamic environment Camogie has grown and developed, exploited technology to increase its output



and support to our members, and increased our club and membership numbers. Growth of our game and ensuring that Camogie is a field sport of choice for girls is the headline of our ambitions going forward.

I would like to thank Sport Ireland for their support in delivering this project, our Ard Chomhairle for their belief in the value of the research project, our members who invested their time in completing the research survey and focus groups, our staff team for their dedication in growing and developing Camogie and promoting this research project, and David Barrett and the team at the Sport Industry Research Centre in Sheffield Hallam University for their attention to detail and hard work in preparing this report.

Thanks to this research, and the insights from over 5,000 Camogie Association members, we know where we are, and can plan in detail where we want to get to. The fun starts now, as we take the information contained within this document and turn it into our strategic plan and develop programmes and initiatives to roll out through our clubs and members over the coming months and years.

Tús mhaith is leath na hoibre. Knowledge is power – now lets make it count and drive Camogie forward to be the field sport of choice for girls and women to play- socially and competitively.

Is mise, le meas,

Sinéad McNulty
CEO

Introduction

This report presents the findings of research into Camogie, undertaken by the Sport Industry Research Centre at Sheffield Hallam University. The research was commissioned by the Camogie Association, supported by Sport Ireland. The aim was to investigate the current state of play with regard to membership, participation, volunteering, finance, and facilities, to guide future strategic planning and decision making. The research findings are to be used to inform the development of the Association's next strategic plan. The scope of the research also reflects the Camogie Association's role in promoting Irish language and culture.

The results presented here are intended to give an indication of the general state of play of Camogie at county and club level, measured against the current position across the island of Ireland. The primary focus of the findings is on individual engagement with Camogie, but connections with other codes in the Gaelic Games family

are made throughout to contextualise the position of the sport in the broader picture with respect to sport and physical activity. They should be viewed in the context of establishing a baseline of current levels of engagement and involvement, so that future trends may be monitored and compared with a reliable and consistent set of data.

It is important to note that although the Camogie Association has conducted primary research in the past to support its planning and delivery, the survey upon which much of the analysis contained in the report is based is much larger in scope and scale than previous exercises. It is not possible therefore, to make any direct comparisons with previous research into Camogie or fit the findings into any time series of outputs. Nevertheless, an improved understanding of the baseline position of the sport is timely and essential to developing plans for continued growth in the months and years ahead, and will enable comparative data analysis in the future.

“41% of the respondents are coaches and 33% spectators.”

Results

Camogie Participation and Membership Survey

The Participation and Membership Survey generated a significant sample which enables detailed analysis by geographic and demographic group. The results presented here identify outcomes for the sample as a whole, and variations of significance which help to explain patterns of behaviour, motivations, and intentions among respondents. Before exploring the more detailed analysis however, it is first necessary to consider the nature of the survey sample.

Figure 1 shows the nature of the sample in terms of gender, age, engagement with Camogie, and provincial

geography, with several key facts evident in the graph. While women make up the majority of respondents (74%), it is also apparent that a significant number of men (26%) are engaged with the game in some way. Two thirds of respondents are aged between 25 and 54 (66%), while 36% have played the game in the last 12 months. Interestingly, 41% of the respondents are coaches and 33% spectators, while 17% have played Ladies Gaelic Football in the last year. In geographic terms, Leinster (44%) and Munster (33%) account for more than three quarters of all respondents, with members of clubs in Cork (15%) and Dublin (14%) foremost among them.

Figure 1 - Participant and Membership Survey Sample

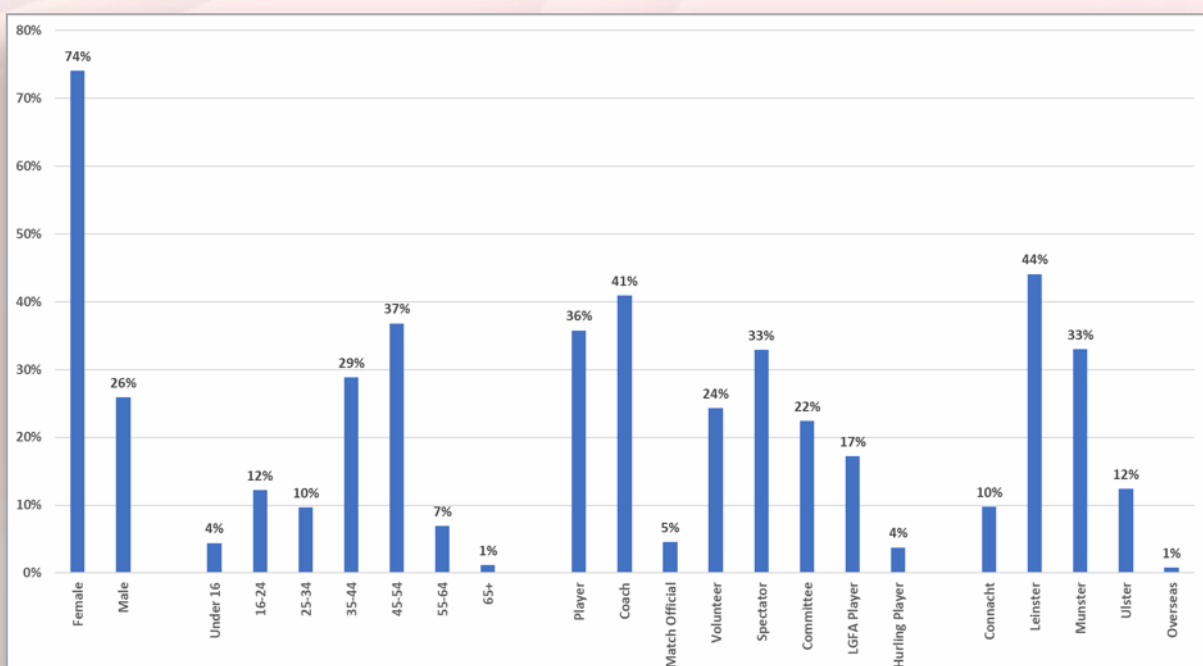


Figure 2 - Responses by County

County	Response	%	County	Response	%
Cork	719	15%	Offaly	114	2%
Dublin	676	14%	Armagh	101	2%
Galway	400	8%	Carlow	80	2%
Wexford	294	6%	Derry	72	1%
Tipperary	282	6%	Laois	72	1%
Kilkenny	263	5%	Roscommon	55	1%
Clare	207	4%	Kerry	47	1%
Kildare	203	4%	Donegal	44	1%
Limerick	202	4%	Louth	44	1%
Waterford	176	4%	Cavan	38	1%
Meath	173	3%	Tyrone	34	1%
Antrim	157	3%	Mayo	28	1%
Down	153	3%	Britain	24	0%
Wicklow	133	3%	Monaghan	15	0%
Westmeath	132	3%	Not Stated	44	1%
			Total	4,982	100%

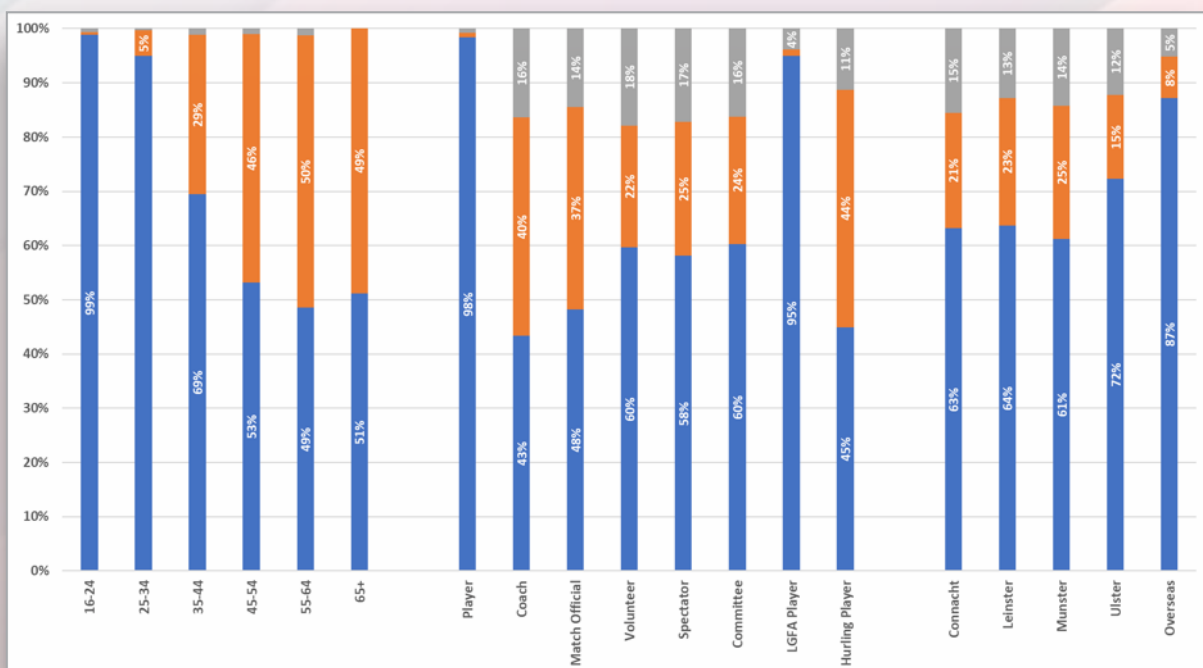
The geographical distribution of sample responses raises an important point relating to the relative strength of the game in participation terms across Ireland. Nearly half of all the responses to the survey (44%) came from Leinster, while a further 33% were from people living in Munster.

Ulster (12%) and Connacht (10%) accounted for almost all of the remainder. Figure 2 shows responses by county board,

with those counties playing in the 2023 All-Ireland Senior Championship highlighted in green. Twelve of the seventeen counties which generated more than 100 responses are those competing in the Senior Championship, while the three counties which are not listed (Fermanagh, Leitrim, and Longford) have a limited Camogie presence at club level and do not have a county board in place.

“Male involvement with Camogie increases with age.”

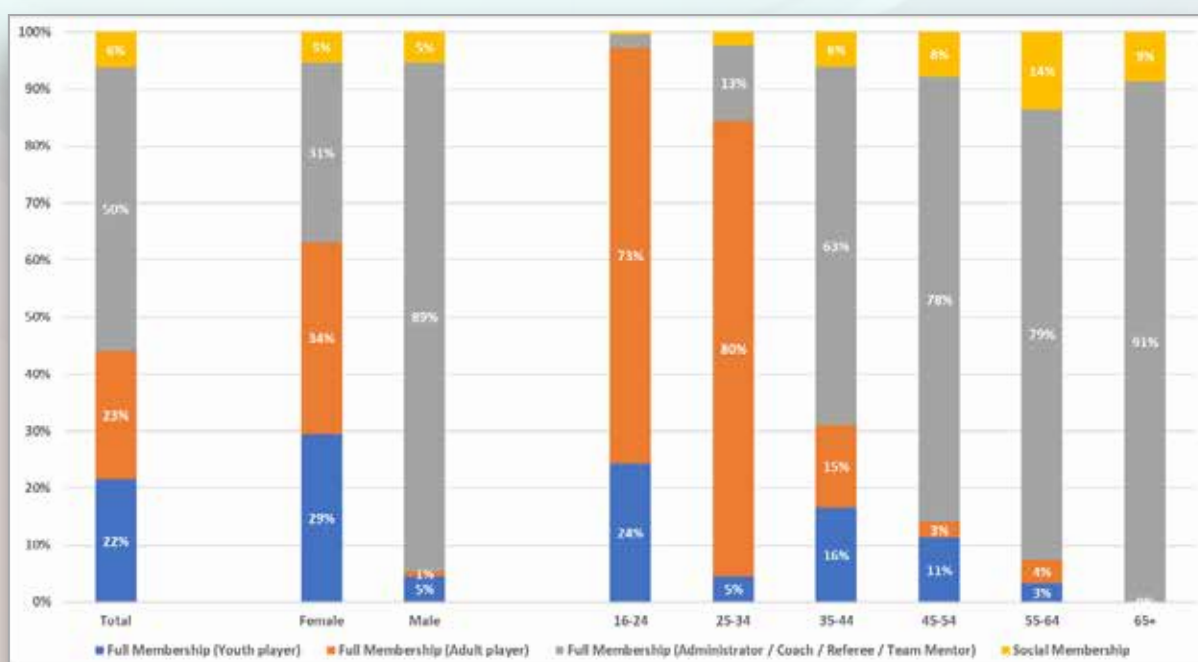
Figure 3 - The Nature of the Sample, by Age, Role and Location



A further examination of the sample by gender helps to explain who responded to the survey, and how they engage with Camogie (Figure 3). The graph shows the gender split in each category, and makes clear how engagement changes over time. Male involvement with Camogie increases with age, with just under half of all respondents aged 45 and above being men. This appears to relate to the roles undertaken in support of the game, male respondents accounting for 40% of coaches and 37% of match officials. Female respondents make up the greater share of volunteers (60%), spectators (58%) and

committee members (60%), and almost all players of both major Gaelic Games codes. It is also interesting to note that the proportion of female respondents is consistent in Connacht, Leinster, and Munster, at just above 60%, but notably higher in Ulster (72%) and higher still overseas (87%), though in the latter case the sample size is too small to be statistically reliable. An understanding of the survey sample is useful in explaining responses to questions relating to participation, satisfaction, and intentions with regard to future engagement in Camogie. The analysis which follows should therefore be viewed in this context.

Figure 4 - Type of Camogie Membership



Joining a Club

Membership of a Gaelic Games club is often described as a habit for life, and the survey results confirm that Camogie participants adhere to this pattern. Figure 4 outlines the affiliations of respondents by membership type, with 95% holding full membership. This is split between youth players (22%), adult players (23%) and the 50% of affiliated members who have a non-playing role (volunteers, coaches, match officials etc.).

There are distinct differences by gender however, with 63% of female respondents holding a playing membership and

almost 90% of males a non-playing membership. There is also a clear age gradient, with playing memberships making up a much higher proportion of affiliations among younger age groups, while the majority of people aged 35 and over have a non-playing role. This reflects the fact that active participation in all almost all sports declines with age. As people take on additional commitments at work and in the home, there is a negative impact on their ability to find time to train and play. Data produced by Sport Ireland confirms that in simple terms, the impact of age on participation is not unique to Gaelic Games, and is evident in all sports and activities in Ireland.

Figure 5 - Length of Club Membership

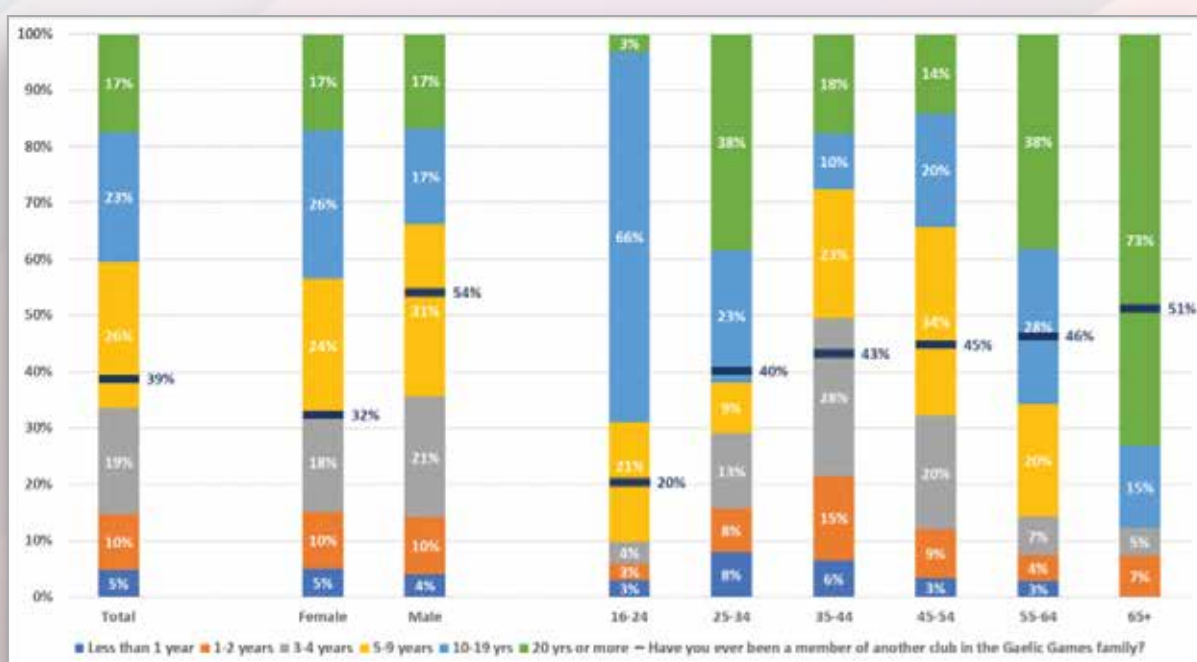
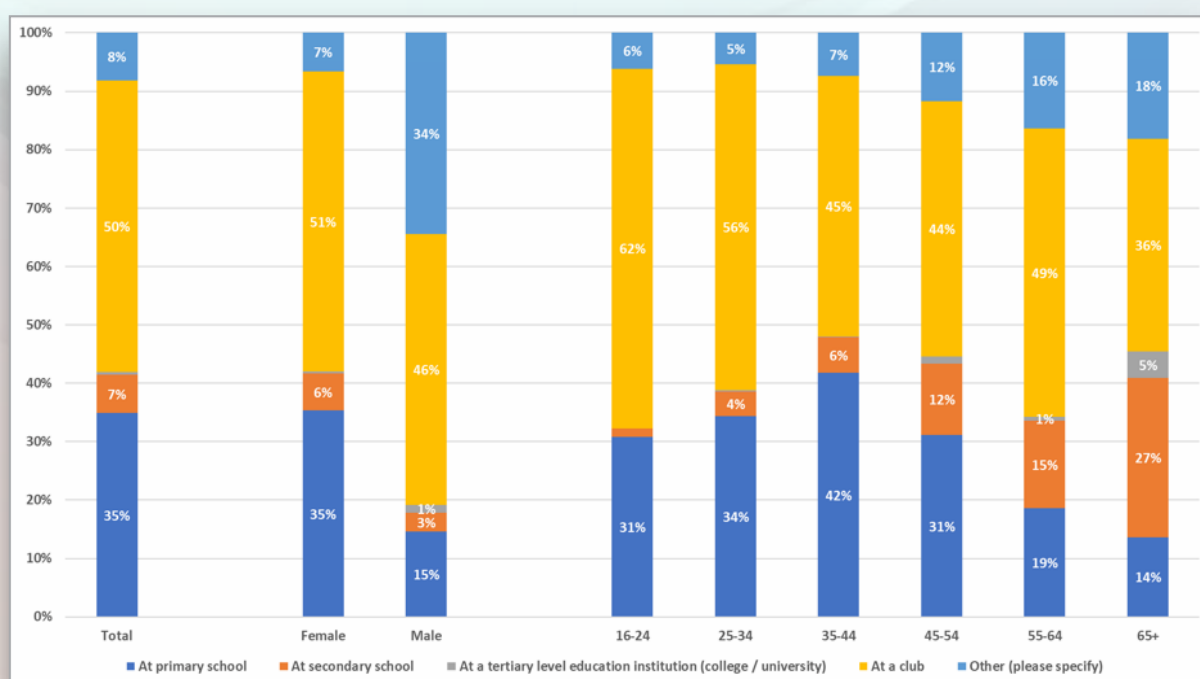


Figure 5 confirms that once engaged with a Camogie club, a significant proportion of respondents retain a long-term affiliation. Just over 40% of respondents have been a member of their club for 10 years or more, and only 39% have ever changed clubs. Interestingly, a higher proportion of men (54%) have been a member of another Gaelic Games club, though this figure demonstrates most reporting that they are affiliated to a separate entity for football or hurling. Similarly, many women report that they are members of a club affiliated to the LGFA, rather than having changed clubs to play Camogie.¹

“ Just over 40% of respondents have been a member of their club for 10 years or more.”

1 - <https://www.sportireland.ie/sites/default/files/media/document/2023-12/2022-ism-report.pdf>

Figure 6 - Where did you first try Gaelic Games?



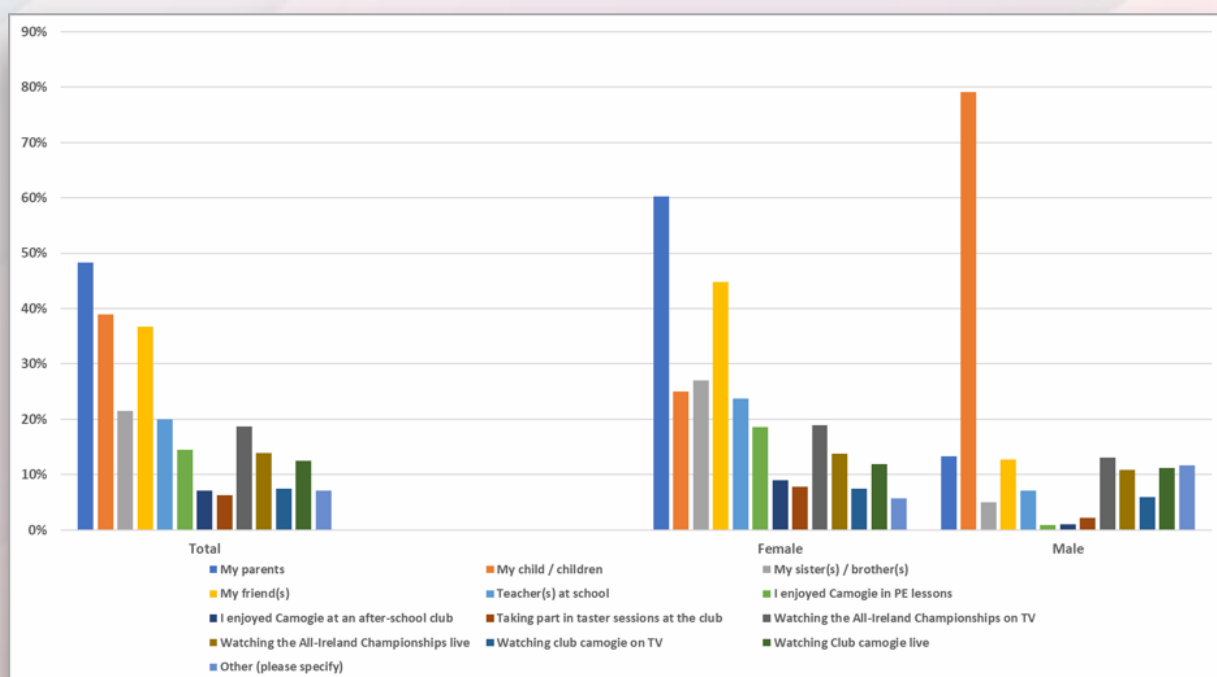
The age gradient evident in figure 6 is notable for several reasons. First, even among respondents aged 16 to 24, the majority (69%) report being a member of their club for at least 10 years. Second, just under half of those aged 35 to 44 state that they joined their club within the last 4 years, many of whom state they did so in support of a child's participation. Third, almost three quarters of respondents aged 65 and above have been members of their club for more than 20 years, reinforcing the notion that membership is for life.

The importance of the club environment to participation in Camogie is underlined by Figure 6, which shows where survey respondents were first introduced to Gaelic Games in general (and for many, Camogie more specifically). Half of all respondents said that they first tried Gaelic Games at a club, and it is interesting to note that this figure is higher among

people in the younger age groups, with 62% of those aged 16 to 24 identifying a club as their entry point.

Conversely, one in three respondents said that they were introduced to Gaelic Games in primary school with a further 7% citing secondary school as the place where the introduction was made. It is notable that only a small proportion of respondents claimed to have first encountered Gaelic Games at a third level institution, and that this figure appears to have declined with time; 5% of respondents aged over 65 said that they started playing Gaelic Games at college or university. This may reflect societal changes, with increasing number of students progressing to third level education since the 1980's, as well as changing attitudes to student life, and the increasing value placed on sport in colleges and universities.

Figure 7 - Who or what influenced you to try Gaelic Games?



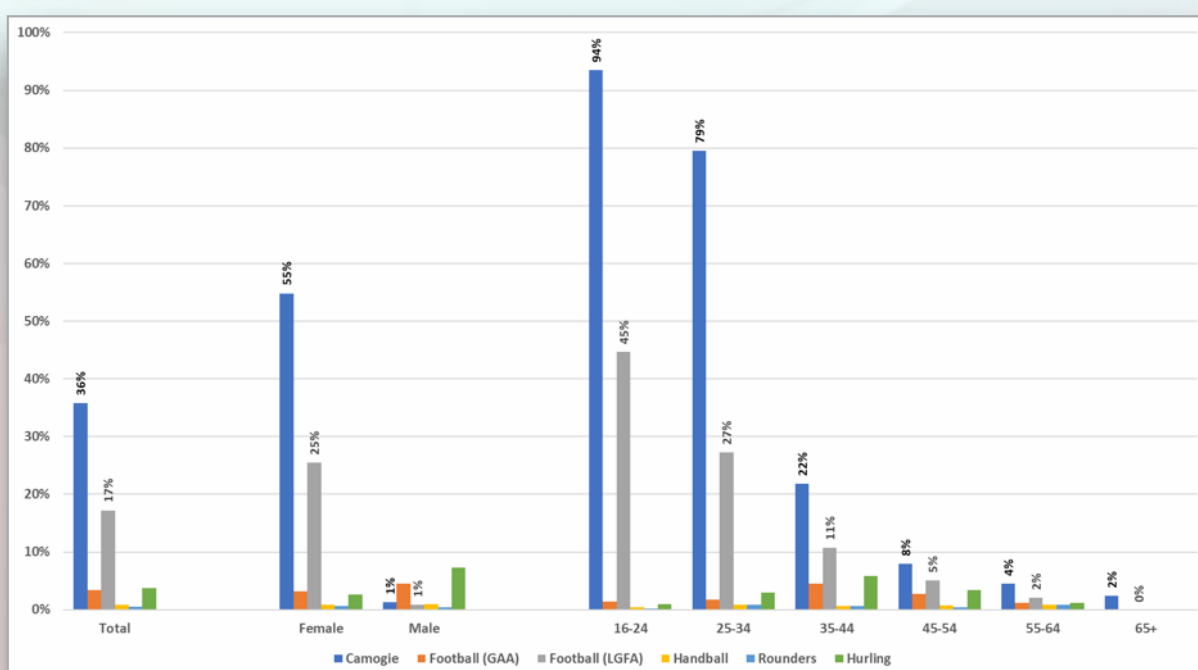
Having established that schools and clubs are the primary routes into Gaelic Games currently, and that once joined, participants tend to stay with a club for significant periods of time, it is useful to explore what influences people to join a club. Personal relationships are key here, and Figure 7 shows that 48% of all survey respondents cite their parents as being influential, while 39% identify their children and 37% refer to their friends. Teachers (21%) and siblings (20%) are also influential, and a further 19% state that watching the All-Ireland Championships on television played a part in persuading them to participate.

There is a significant difference between male and female survey respondents, in that only 23% of women cited their children as having had an influence on them joining a club, compared with 79% of men. This appears to suggest that

men are persuaded to become involved in volunteering, officiating, or coaching in support of a child's participation. Indeed, the other factors were cited by fewer than 13% of male respondents, and 70% said that their child was the strongest influence on their involvement. Women, by contrast, were more likely to identify their parents as being the strongest influence on their decision to join a club (37%), followed by friends (19%) and children (17%).

“48% of all survey respondents cite their parents as being influential.”

Figure 8 – Participation Over the Past 12 Months



Current and Future Engagement

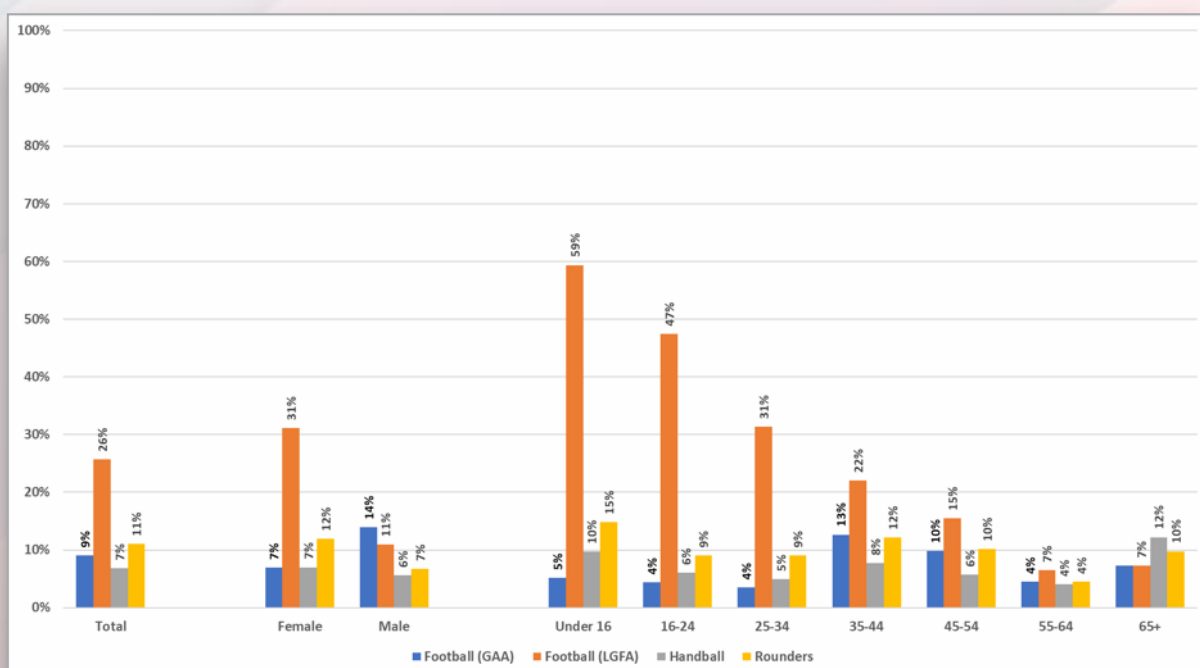
Figure 8 reveals the extent to which individuals **actively participate in the various Gaelic Games codes**, and makes clear that while Camogie is the primary code for responding to the survey, many are also active in other activities. It is clear that a significant proportion of Camogie participants are also active in Ladies Gaelic Football, and this is particularly true of women aged 16 to 25. **Overall, 55% of female respondents played Camogie in the last 12 months**, and 25% played football. Among the youngest age group these proportions were much higher, at 94% and 45% respectively.

These findings echo those of the 2022 Irish Sports Monitor,

which revealed that: “the most common combinations of sport participation are seen within the Gaelic Games. People who play Gaelic Games including Hurling, Camogie or Gaelic Football were highly likely to play a second Gaelic Game. 26% of hurlers and 29% of Camogie players also reported playing Gaelic Football.”

The sharpest decline in active participation rates appears to occur after the age of 35, with only 22% of respondents active in Camogie, and 11% playing Ladies Football, though it should be noted that this older age bracket includes a significant proportion of male respondents. The proportion of women reporting engaging in Handball or Rounders is very low, at less than 1%, even among younger respondents.

Figure 9 - Latent Demand for Gaelic Games



Significantly, individuals who play Camogie and Ladies Football are likely to play regularly. More than half (56%) of all respondents who participate in Camogie played 11 or more games in the last 12 months, and 53% of Ladies Football players participated in more than 10 games. This raises the issue of potential fixture conflicts for those who participate in both codes, though this does not apply to most Camogie players. It should also be noted that while 42% of Camogie players said that they have also played Ladies Football in the past, 46% said that they have no interest at all in doing so in the future.

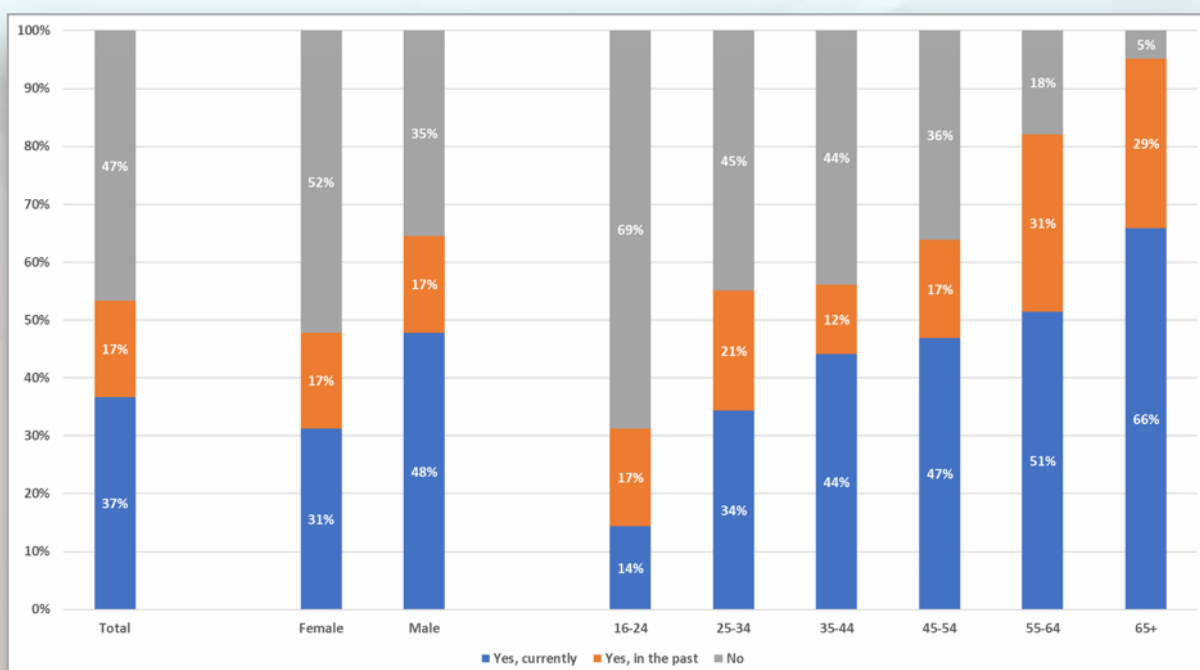
It is perhaps significant in this context, that the majority of respondents report their club offering either Men's (54%) or Ladies Football (57%), while only a small proportion appear

to have the opportunity to engage in Handball (12%) or Rounders (2%).

Figure 9 suggests that there is some scope for further growth across the codes, with 33% of female respondents saying that they would be very interested in playing Ladies Football, and 13% expressing an interest in playing Rounders.

“Individuals who play Camogie and Ladies Football are likely to play regularly.”

Figure 10 - Current and Previous Volunteering Contributions



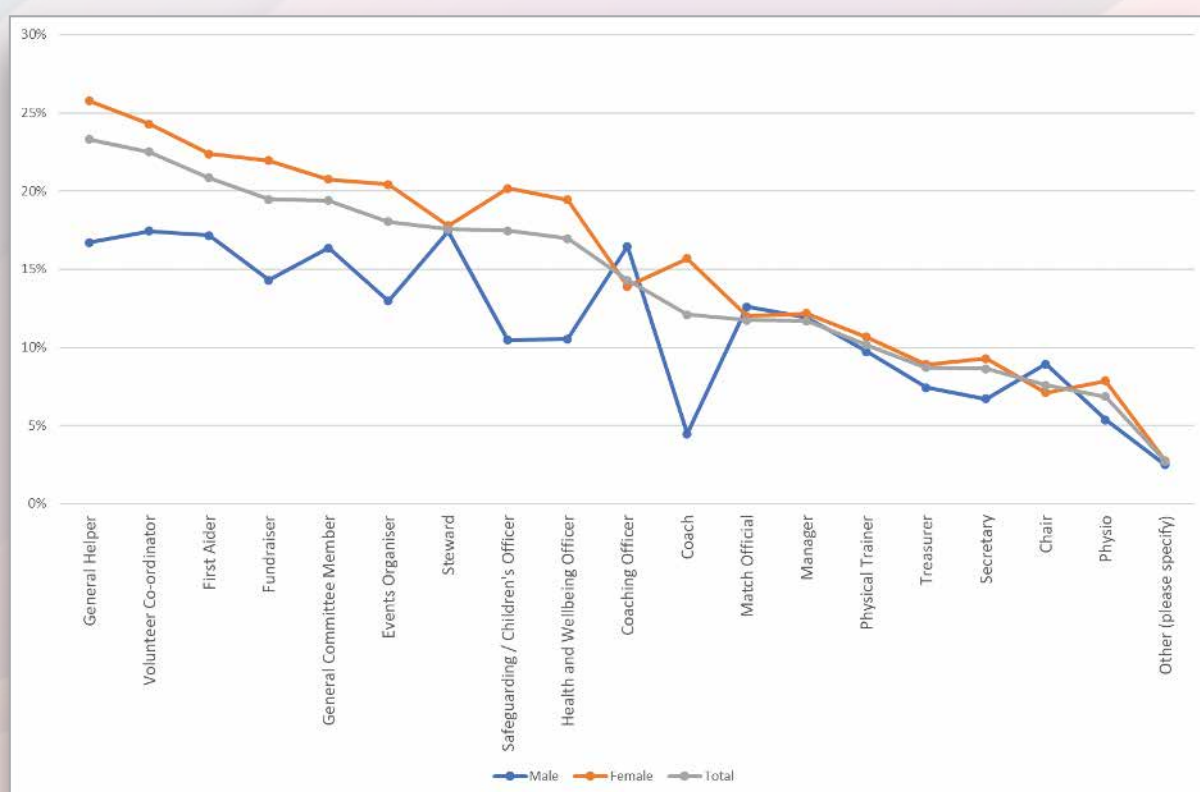
Volunteering

As an amateur sport, Camogie draws its strength from a committed volunteer workforce which supports participation at club and inter-county level. Figure 10 underlines the fact that the provision of Camogie at all levels depends in large part upon older men and women, who give their time to support the participation of young women and girls. Overall, 37% of individuals who responded to the survey currently have a volunteering role in Camogie, but this figure rises to 48% of male respondents, 51% of those aged 55 to 64 and 66% of individuals aged over 65. More significantly, when asked to name a specific volunteering role, 60% of male

respondents stated that they are a coach, compared with 21% of females, while 21% of men are managers (the equivalent figure for women being 5%), and 10% are match officials (3% of females). While this may appear to be a matter of some concern for a sport exclusive to women, the finding is consistent with other team sports both in Ireland and overseas. It should also be noted that the current position is dynamic, and it is to be expected that these figures will change over time as work continues to recruit and retain more female volunteers in these roles.

“ Considerable scope to recruit more volunteers from the ranks of current players.”

Figure 11 - Proportion of Respondents Who Would Consider a Volunteering Role in Future

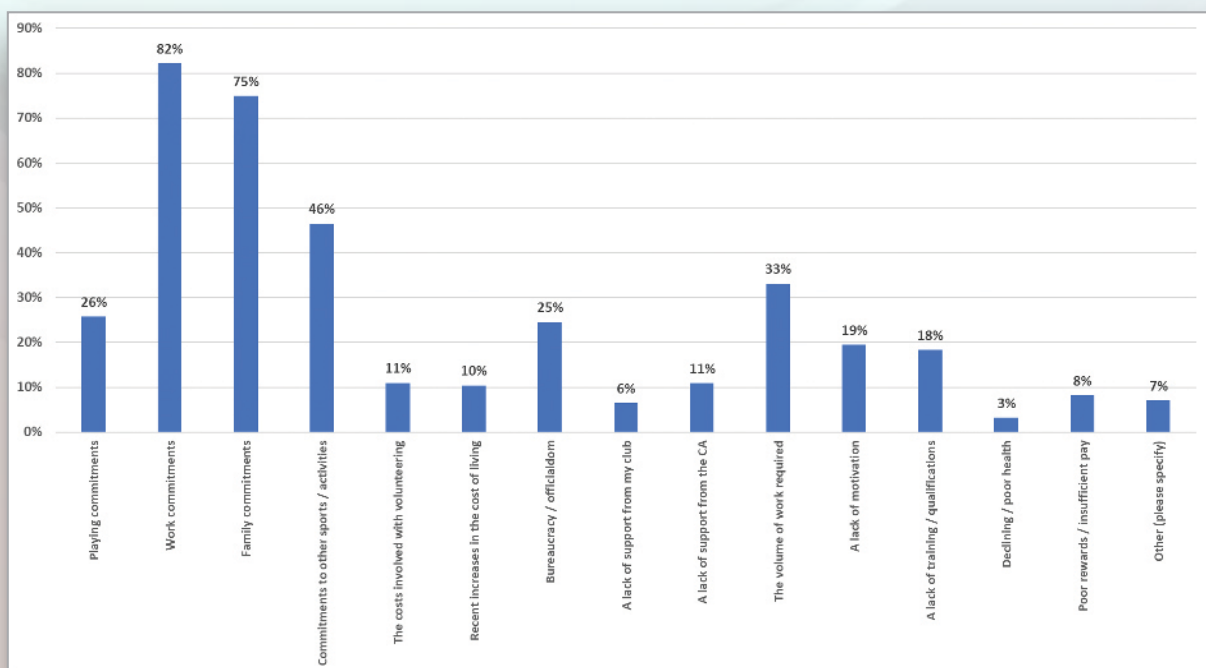


The survey results suggest that there is considerable scope to recruit more volunteers from the ranks of current players. Three quarters of survey respondents feel that volunteering roles at their club are open and accessible, and this translates to a proportion of people who would consider taking on a volunteering role in the future (Figure 11). Interestingly, the proportion of females who said that they would be prepared to volunteer in the future is higher than the equivalent figure for males (with the exception of 'Coaching Officer', 'Match Official' and 'Chair'). **More than a quarter of women responding to the survey would consider being a**

'General Helper', and encouragingly, 16% would be prepared to coach while 12% said they would consider officiating.

This is particularly notable in the context of the Camogie Association wanting to provide opportunities to women in roles that are currently held by men. Additionally, Sport Ireland has stipulated that at least 40% of governing body board members should be female by December 2023, and this target is likely to work its way down from Ard Chomhairle to club level, over coming years.

Figure 12 - Barriers to Volunteering



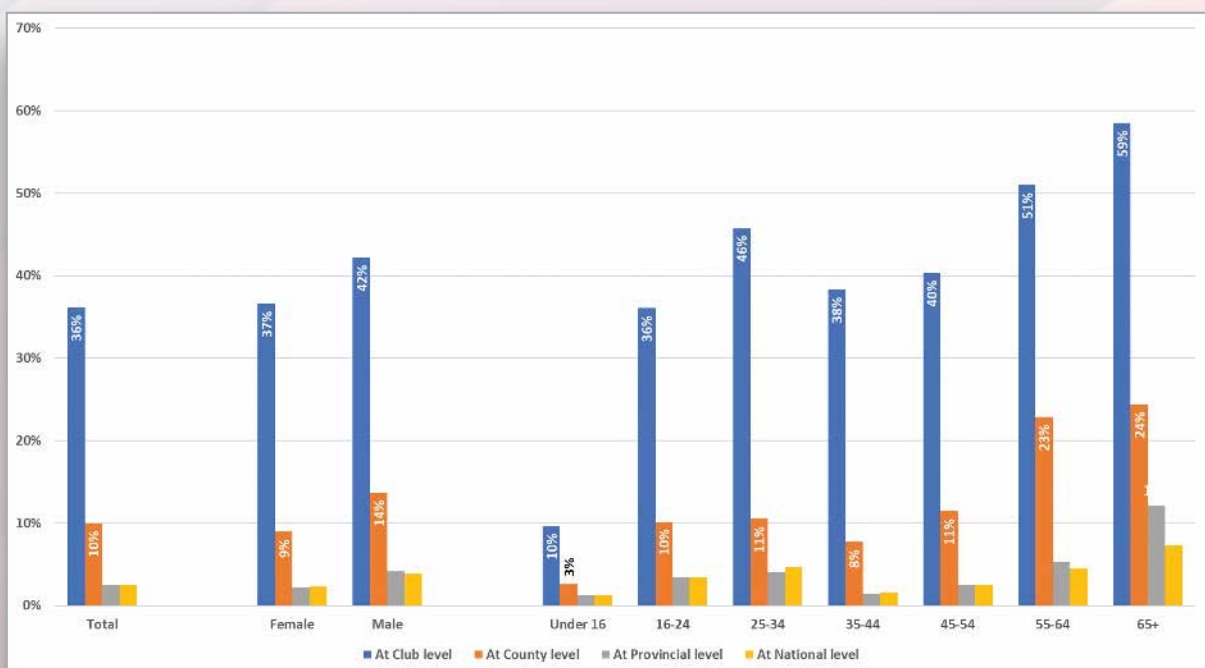
Nevertheless, while the desire to volunteer may be demonstrable, significant barriers exist which prevent individuals from offering their support to the delivery of Camogie (Figure 12). These barriers are predominantly related to the need to balance the demands of work (82%) and family (75%) alongside volunteering commitments.

It is notable however, that 46% of respondents cite other sports and activities as a barrier, while 26% feel that their playing commitments would prevent them from engaging in volunteering. One in three respondents to the survey

are put off volunteering by the volume of work required, underlining the importance of perceptions to the decision to volunteer. Furthermore, 25% of respondents feel that the level of bureaucracy involved in volunteering is prohibitive. These negative perceptions appear to have more traction among older people, with around half of all respondents aged 55 and above saying that the volume of work puts them off volunteering, and just under 40% citing bureaucracy as a barrier.

“36% have considered offering these skills at club level, while 10% would be prepared to apply their knowledge in support of their county.”

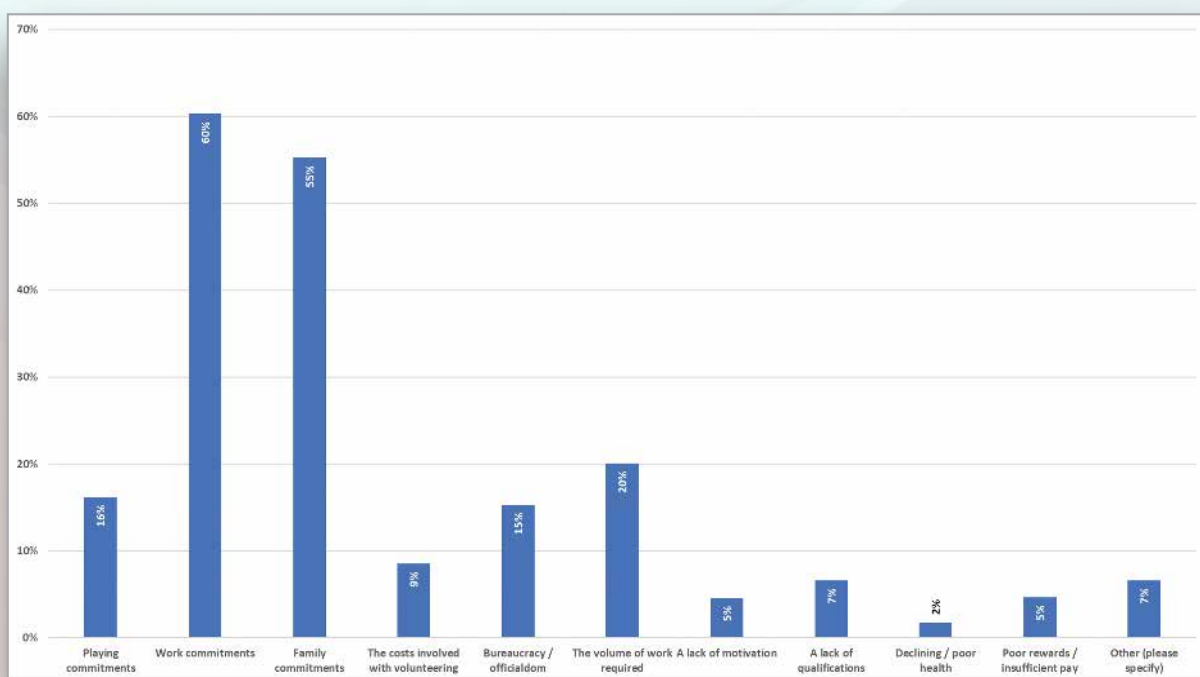
Figure 13 - Interest in Future Volunteering



The survey asked respondents to identify whether they had personal skills or attributes which might be helpful in the running of the game, and the responses were encouraging, particularly at club level. Skills identified by individuals fell into two categories: on-field (predominantly coaching but also including physio, first aid, etc), and; off-field (typically administrative, such as IT, accounting, and education). Just over a third of all respondents (36%) have considered offering these skills at club level, while 10% would be prepared to apply their knowledge in support of their county.

While male respondents are marginally more inclined to offer their skills in support of the game, Figure 13 shows that age is a more significant determinant of willingness to come forward. The proportion of people willing to consider offering their skills to the club or county is higher among people aged between 55 and 64, and higher still among people of pension age. This is likely to be related to the amount of free time that they are able to offer, but the data demonstrates that there are additional volunteers available to support the game.

Figure 14 - Barriers to Offering Skills in Camogie

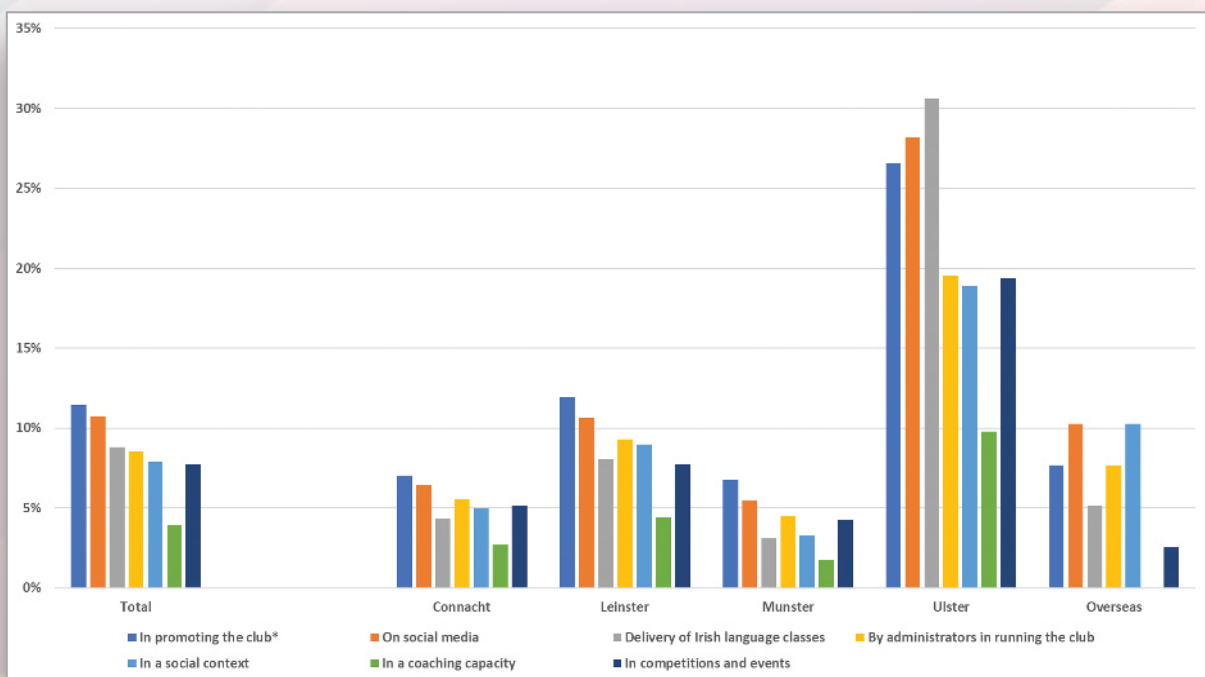


The challenge, therefore, is to identify how to engage with volunteers who have skills to offer. Figure 14 reiterates that barriers which prevent people volunteering in general terms, also interfere with them offering more specific competencies. Work (60%) and family commitments (55%) are again prominent, with the volume of work (20%) and

bureaucracy (15%) secondary concerns. Interestingly, these figures are lower than for volunteering generally, suggesting that familiarity with the tasks involved supports more rational decision making with regard to engagement in Camogie.

“The promotion of the Irish language is a significant aspect of the Camogie Association.”

Figure 15 - Use of the Irish Language

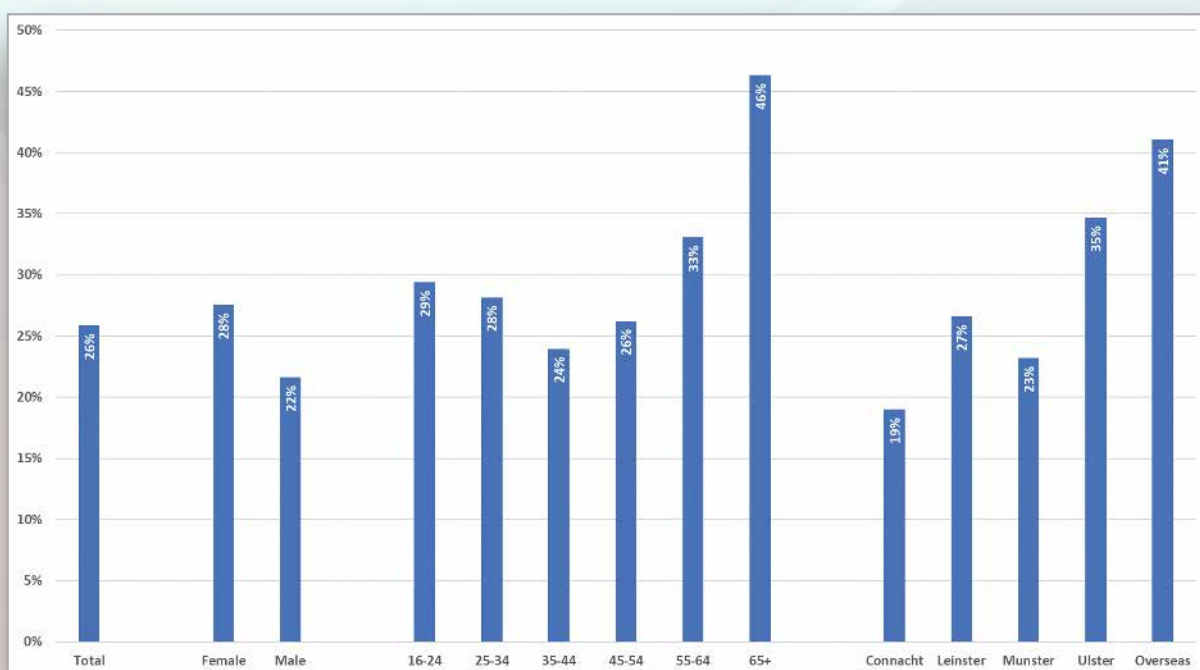


Language and Culture

The promotion of the Irish language is a stated objective of the Camogie Association, as Figure 15 reveals, however, its current use in a range of different contexts is limited, with only around 10% of survey respondents reporting Irish being spoken to a significant extent. There is more widespread use of the Irish language in clubs in Ulster,

with more than a quarter of members reporting that the Irish language is used in club promotion (23%), social media (26%) and Irish language classes (31%). It is notable that a much lower percentage of people (4%) report significant use of the Irish language in a coaching context however, though again, the figure is higher in Ulster (10%).

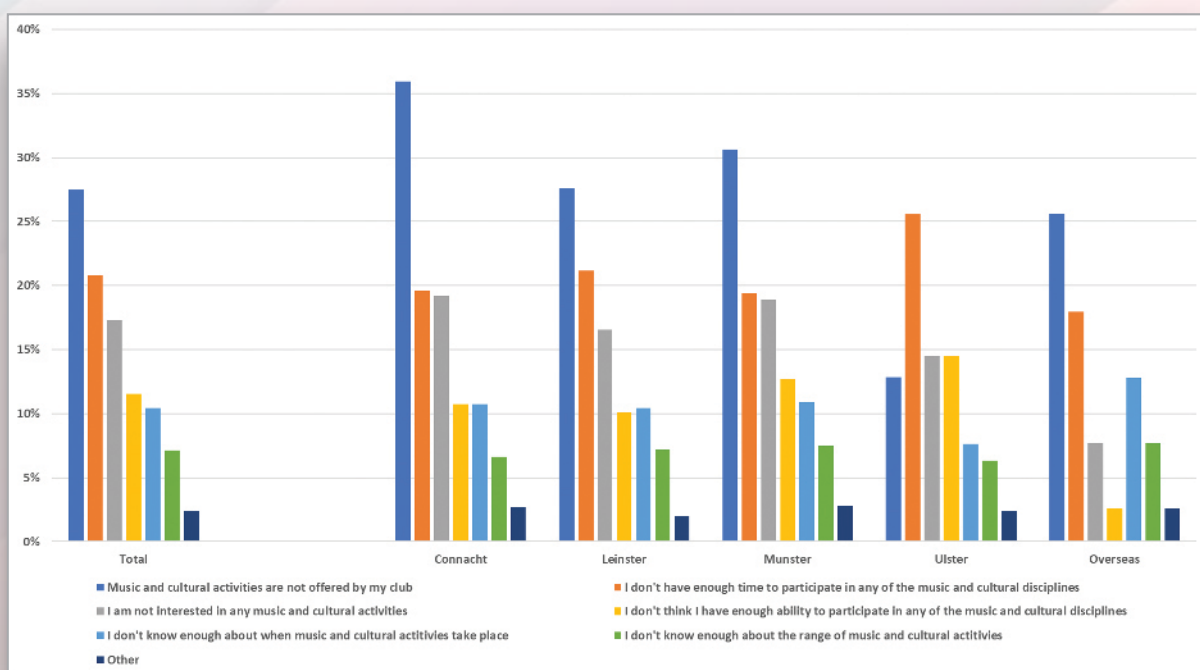
Figure 16 – Participation in Cultural Activities



Just over a quarter of survey respondents have taken part in cultural activities organised by their Camogie club, as Figure 16 shows. Women (28%) are more likely to have engaged than men (22%), and participation rates are higher still among older club members, reflecting a shift in the way that people continue to connect with their club as they grow older, while people of working were the least engaged (24% among those aged 35 to 44).

Ulster again stands out with a higher rate of engagement (35%), while respondents from Connacht were least likely to have participated (19%). Respondents living overseas appear to be particularly keen to maintain cultural links through their Camogie clubs, 41% saying that they had done so.

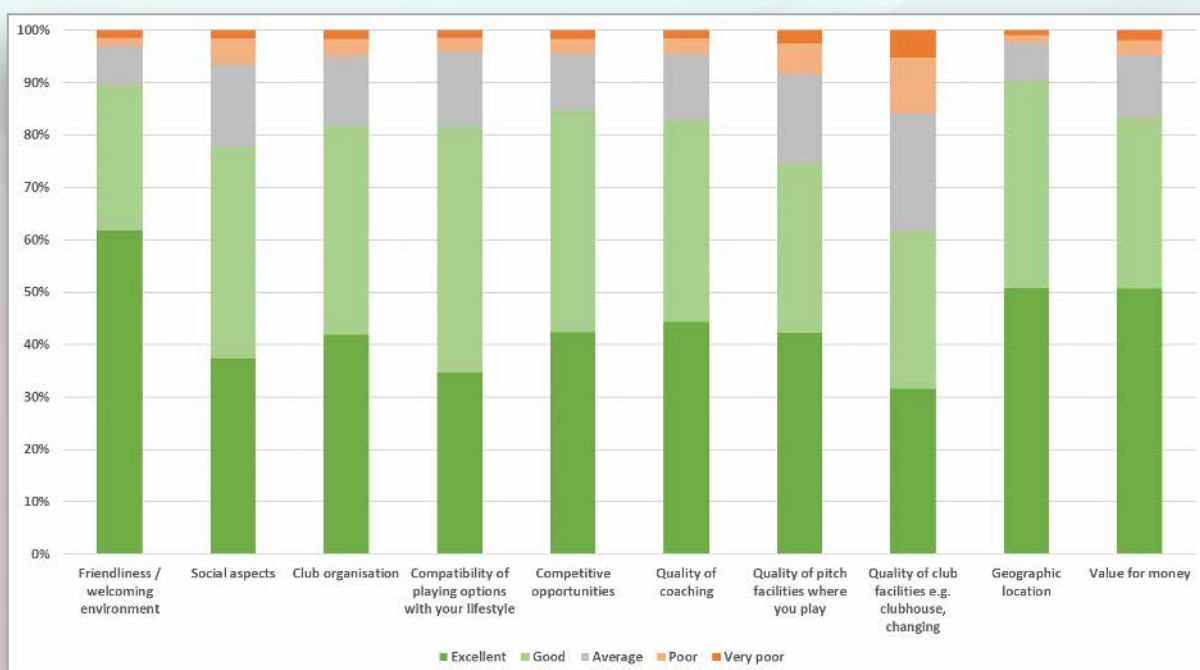
Figure 17 - Barriers to Participation in Cultural Activities



These patterns are explained to some extent by Figure 17, which shows that the primary reason for not engaging in cultural activities is that clubs do not offer them (27%). This is particularly true in Connacht (36%), and to a lesser extent Munster (31%) and Leinster (27%), while only 13% of respondents from Ulster identified this as a barrier to participation. The more significant issue in Ulster is potential participants lacking the time to engage (26%),

while a notable proportion of respondents from Connacht (19%), Leinster (17%) and Munster (19%) said that they were not interested in participating.

Figure 18 - Satisfaction with Personal Experience of Club



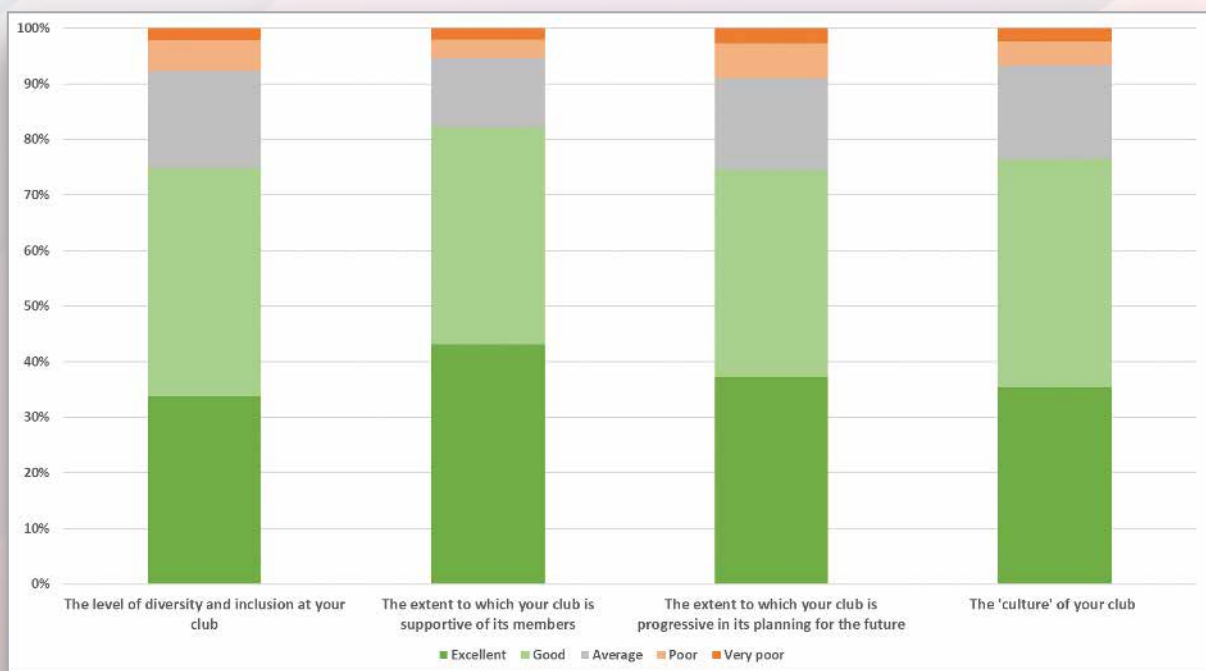
Satisfaction

The survey asked members to rate a number of aspects of club membership, the answers providing a measure of satisfaction with clubs' planning, administration, and delivery of Camogie. Figure 18 shows that in most respects, members rate their club as 'Excellent' or 'Good', underlining the strong appeal of club membership. Friendliness (88%) and geographic location (88%) are rated particularly

highly, with the majority of members believing that their club performed well against the measures of community importance. Coaching (81%) and competition (79%) also achieve high scores, while most members feel their club is well organised (80%) and offers good or excellent value for money (81%).

“Offers good or excellent value for money (81%).”

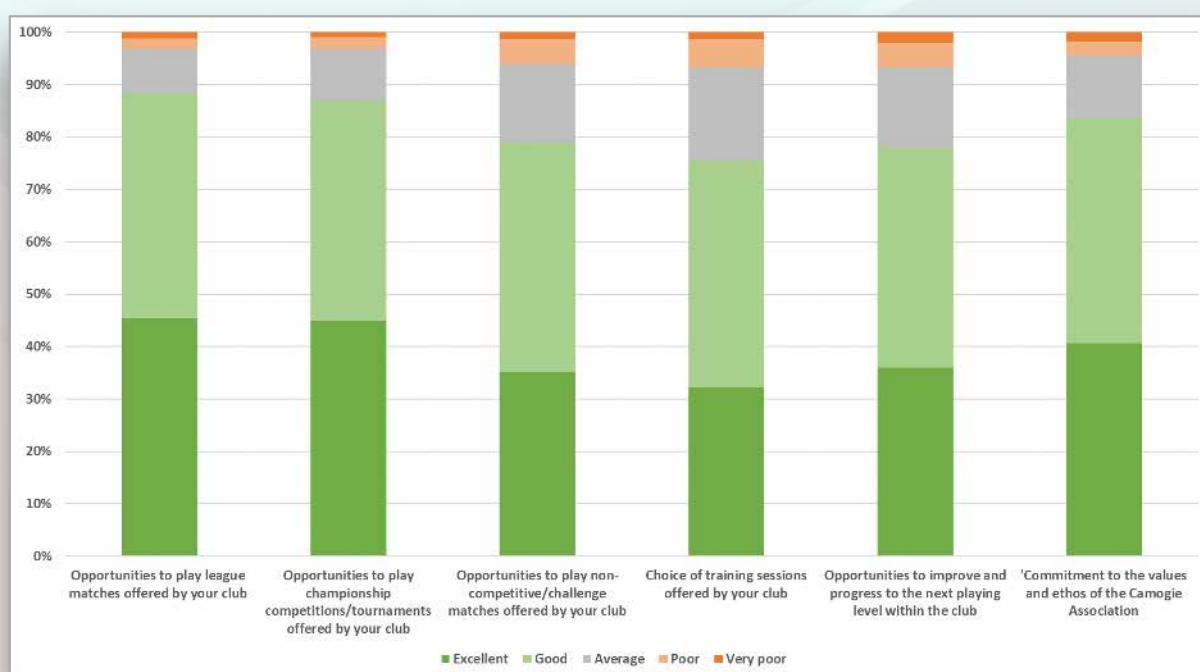
Figure 19 - Satisfaction with Club Culture and Environment



On the subject of club culture and environment, the picture is again a positive one (Figure 19). There is broad agreement that clubs are diverse and inclusive (75%), and that they are supportive of their members (82%). Similarly, most respondents believe that their club is progressive in its planning for the future (75%) and are satisfied with

the culture of the club (76%). Satisfaction does not vary significantly by age or gender, though it is perhaps notable that the scores among younger respondents are marginally lower across the board. Members aged over 65 reported higher satisfaction than any other group (88%) with the level of support provided by their club.

Figure 20 - Satisfaction with Playing and Training Experience

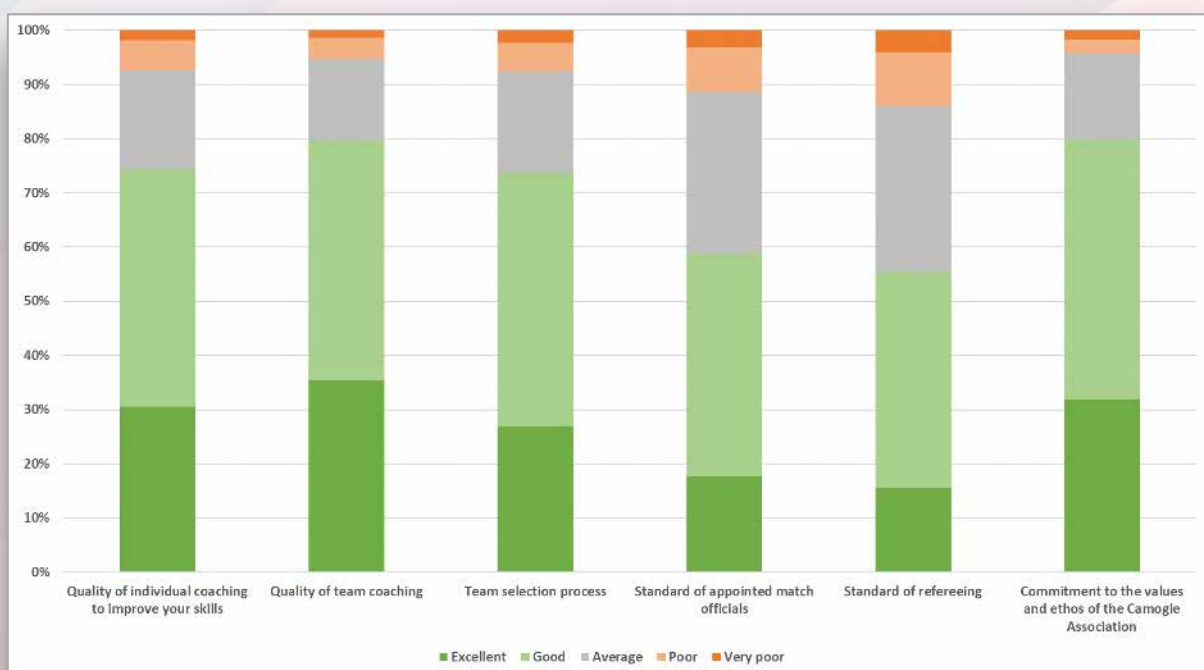


The survey also records high levels of satisfaction with the experience of playing and training in Camogie clubs (Figure 20). A clear majority of respondents were satisfied with the competitive league (88%) and championship (87%) opportunities on offer, as well as with the opportunity to play socially (79%). Satisfaction with training (75%) and player development opportunities is also high (78%). It is notable that male respondents (most of whom are coaches) are less satisfied with playing and training opportunities than their female counterparts.

The Camogie Association should take some reassurance from the fact that 83% of survey respondents feel their club is committed to the values and ethos of the sport. Nevertheless, it is also pertinent to note that the national results of the Safeguarding and Risk Assessment process (May 2023) which highlighted that a high proportion of complaints to children's officers related to a lack of playing time at underage level. This outcome, combined with the high proportion of adults in the survey, means that there is no room for complacency in responding to this challenge.

“80% have a positive opinion of the quality of team coaching.”

Figure 21 - Satisfaction with Coaching, Officiating and Management

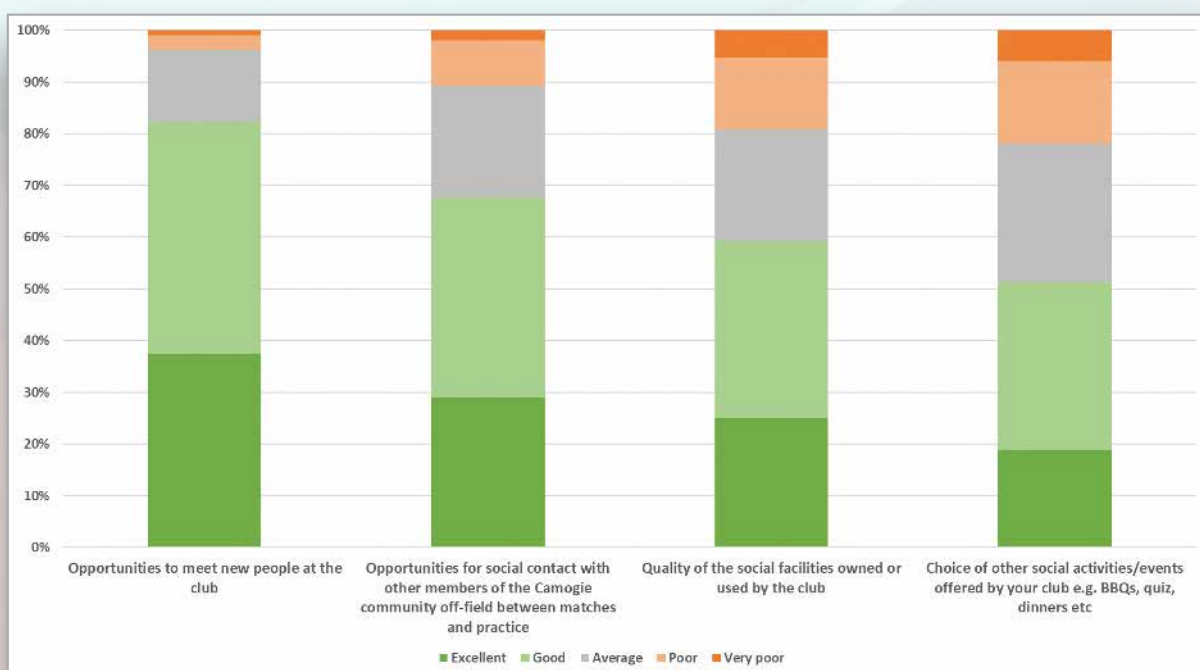


The survey reveals high levels of satisfaction with the quality coaching within clubs, with 74% of respondents rating individual (skills) as 'Good' or 'Excellent', while 80% have a positive opinion of the quality of team coaching on offer. Almost three quarters (74%) of club members are satisfied with team selection while 80% feel coaching and selection is consistent with the ethos and values of the Camogie Association (Figure 21).

Opinions relating to referees and match officials are

more neutral however, with only 59% of members rating referees as 'Good' or 'Excellent' and 55% satisfied with the standard of match officials. This should not be taken as cause for particular concern, however. Only 11% of survey respondents expressed a negative view of match referees for example, with the remainder (30%) rating them as 'average'. Additionally, the findings are consistent with similar surveys conducted in other sports, which report a more negative view of officiating than of other aspects of club administration and delivery.

Figure 22 - Satisfaction with Social Experience



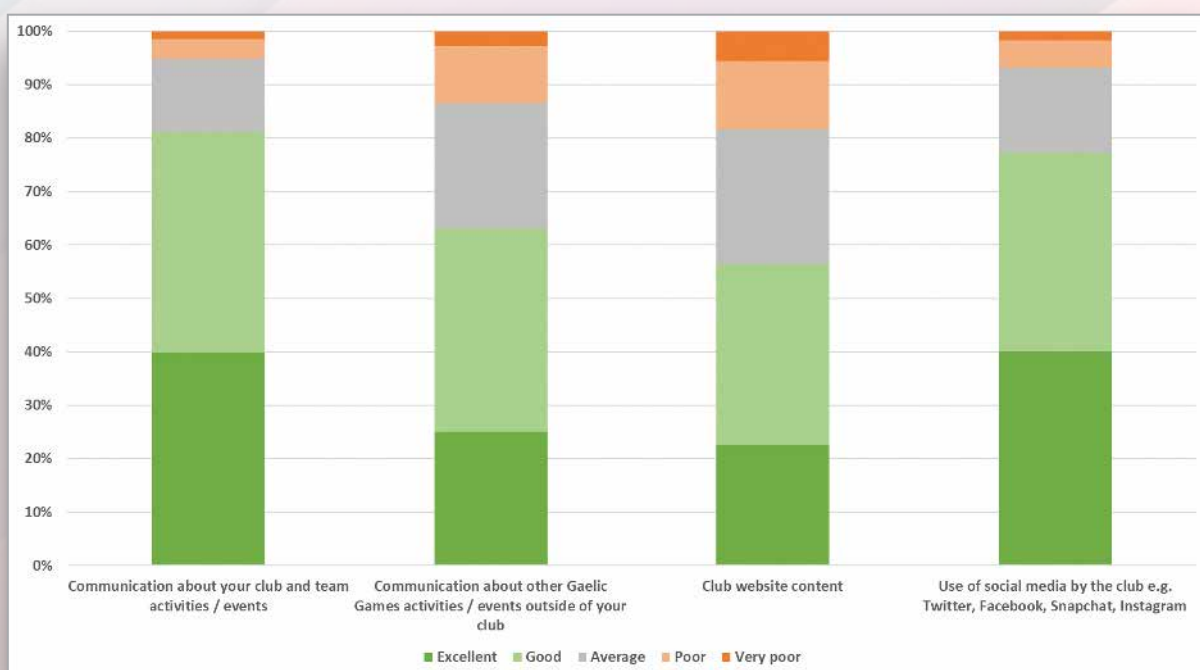
Voluntary sports clubs are underpinned by members' social interactions which are fundamental to fostering a sense of togetherness and shared purpose, and the survey results reveal some interesting findings in this regard. Significantly, 82% of club members are satisfied that their Camogie club offers 'Good' or 'Excellent' opportunities to meet new people. Further, two thirds of respondents feel that they have opportunities for social contact with members of other clubs between matches and practice (Figure 22).

It is notable however, that while 60% of respondents rate their club's social facilities as 'Good' or 'Excellent', almost 20% feel that they are 'Poor' or 'Very Ppoor', equating to a net satisfaction rate of only 40%. Moreover, 51% of members are satisfied with the choice of other social

activities offered by their clubs, but 22% have a negative view with net satisfaction running at 29%. There is a strong sense from the survey, that social interactions off the pitch are being constrained by poor facilities which limit the range of functions and activities which clubs can provide for their members.

“82% of club members are satisfied that their Camogie club offers ‘Good’ or ‘Excellent’ opportunities to meet new people.”

Figure 23 - Satisfaction with Experience of Club Communication



Camogie club members appear to be generally satisfied with the flow of information about activities and events, with 81% rating their clubs' communication as 'Good' or 'Excellent'. Tellingly, they are less satisfied with the communication of other Gaelic Games activities (i.e., other codes and other contexts), with 64% scoring this positively, and 14% expressing a negative view (to give a net satisfaction score of just under 50%). It may be the case that survey respondents are reflecting a view of communications from other parts of the Gaelic Games community, including county boards and Ard Comhairle, though it is impossible to confirm this without further investigation.

It is also interesting to note that while 77% of respondents were satisfied with their club's use of social media, the

equivalent score for more 'traditional' club websites was much lower at 56%, with 18% saying they were dissatisfied (net satisfaction falling to 38% (Figure 23).

This is another aspect of club activity which mirrors trends seen elsewhere in Gaelic Games, and in other sports. Clubs are increasingly exploiting the ease and immediacy of social media to communicate with their members, rendering traditional internet pages redundant to some extent. Nevertheless, there is no significant difference between members from different age groups in terms of their satisfaction with clubs' use of social media or more traditional websites. It is also pertinent to note that older respondents are more satisfied with club websites, while younger people are generally more favourable towards social media.

Added Value

The range of activities offered by Gaelic Games clubs includes, in many cases, recreational sport and physical activity which does not come under the aegis of the Camogie Association or any other governing body concerned with Gaelic Games. Just under a third of all respondents are members of clubs that offer walking or rambling (32%), with 30% stating that their club encourages participation in running (and a further 5% citing parkrun activities). Other activities on offer include fitness classes (25%), golf (18%), yoga and pilates (14%), and dance classes (8%).

It is important to note that these figures relate only to the extent to which activities are offered by clubs, rather than any measure of participation in them. There is a clear desire on the part of club members to do more than participate in Camogie at their club. Indeed, half of those who responded to the survey thought that their club should provide more opportunities to socialise, while 43% felt that their club should stage events that were open to the whole community and 25% wanted their club to be more inclusive of people from non-traditional Camogie backgrounds. Nevertheless, 21% of respondents want to engage with other organisations in the Gaelic Games family, and 41% would like their club to organise supporters' trips to major Camogie occasions.

This underlines both the inter-related nature of Gaelic Games clubs, and the importance of shared experiences to fostering camaraderie and togetherness. The value of Camogie to an individual, and that of membership of a Camogie club, are not therefore restricted to the direct benefits of participation, but also includes indirect social benefits which come from an enlarged social network.

Figure 24 and Figure 25 show how it is possible to quantify, albeit in crude terms, the social value of Camogie to its participants and club members. The graphs show how the sum total of activity in Camogie may be equated to the contribution of time and money to participation, coaching, volunteering, and spectating. The largest proportion of engagement with Camogie measured in terms of time, is through active participation, at just under 4.5 hours per person per week, while coaching consumes an average of 4 hours per week each.

The average volunteer contributes 2.75 hours of time per week in support of Camogie, while match officials are engaged for slightly longer, at three hours twenty minutes per week. Interestingly, spectators spend more than two and a half hours per week watching Camogie, although the survey makes no distinction between watching in person and watching coverage of the game on television.

Crucially, Figure 24 also highlights how the contribution of time varies by gender and age. For example, men spend 4 hours and 41 minutes coaching per week, compared with an average of three hours and seven minutes for women. Similarly, respondents aged between 16 and 34 participate for just over five hours per week, but after the age of 35 the average amount of weekly participation time declines dramatically to just under three hours. Conversely, the contribution of time from older respondents to coaching, increases steadily with age, while engagement in match officiating and other forms of volunteering peaks in the 25-34 age bracket.

“ 4.5 hours, per person, per week active participation. ”

Figure 24 - Social Value Contribution of Camogie: Time in Hours per Week

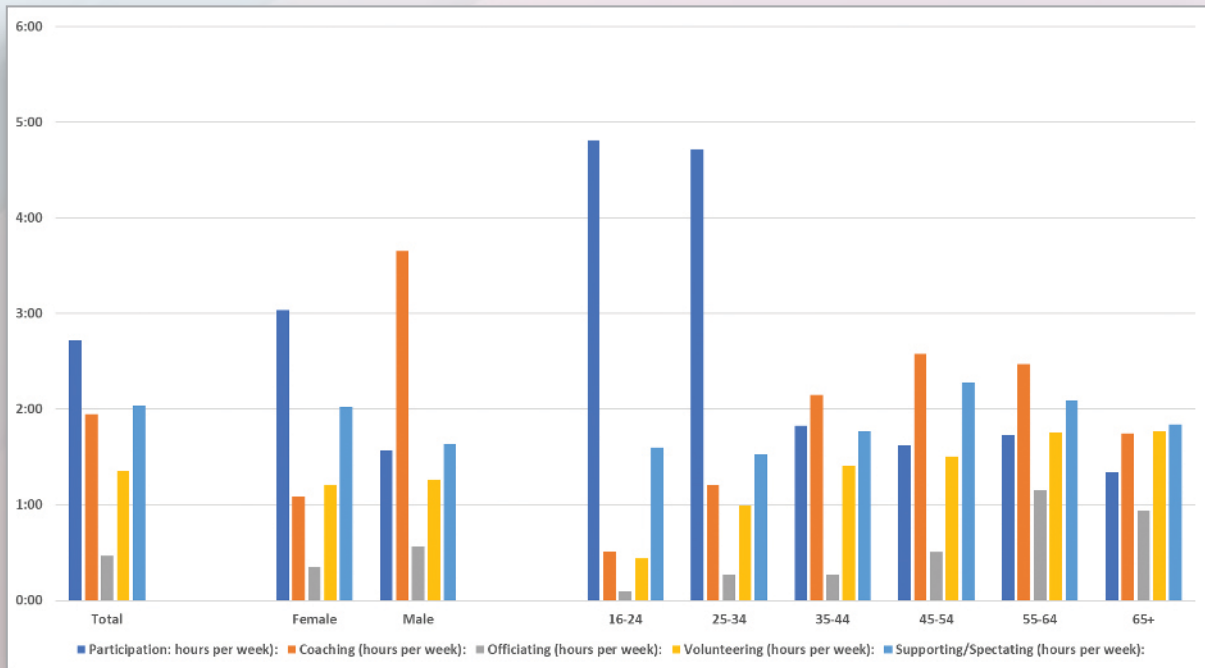
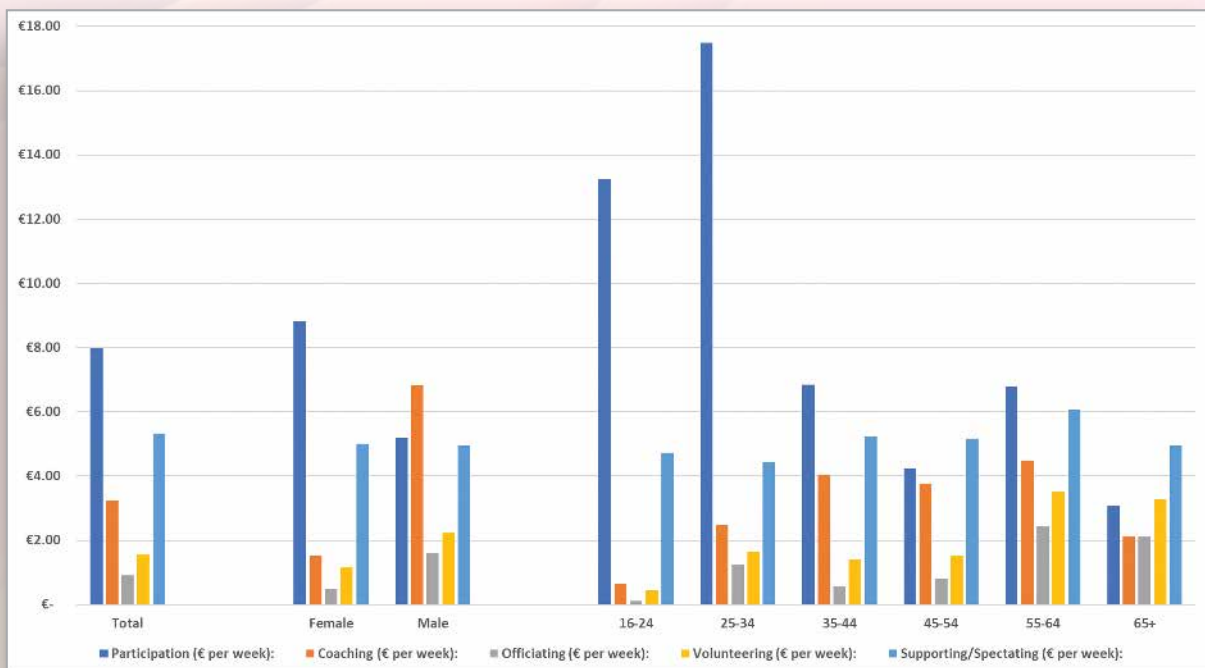


Figure 25 - Social Value Contribution of Camogie: Money in Euros per Week



In financial terms, impact of engagement on Camogie club members is also notable, with participation costing the average Camogie club member €11.79 per week, while spending on spectating comes to €6.88. Volunteering (€3.38) generates lower costs on average, though coaching (€6.85) and officiating (€9.15) are more expensive for those who are engaged in this way.

As the analysis of time data has established, the contributions made by different participant groups reflect the demands of the roles in which they engage, and the extent of their involvement, which is reflected in their financial commitments. Thus, young people spend more money on participating than elder members, who are more likely to spend money on volunteering and coaching. It is interesting to note that the highest level of spending on participation is among those aged 25 to 34, reflecting the discounts on subscriptions and match fees available to those in younger age groups.

Given that they constitute a minority of the overall membership, it is to be expected that the actual contribution of time and money made by coaches and volunteers is higher than these average figures, and some indication of this comes from the variation by age evident in the graph. Male respondents, spend twice as much money on coaching per week (€8.75) as females (€4.45), and significantly more on officiating (€12.88 for males compared with €3.96 for females). Respondents aged 55 to 64 commit more in financial terms to coaching (€8.98 per week) than those of playing age, though it is interesting to note that there is a secondary peak in terms of coaching spending among those aged between 25 and 34 (€8.06).

The financial cost of spectating is remarkably consistent between the demographic groups however, at around €6.50 per week (with the exception of those aged 65 and above). Measuring the extent of the broader social impact of Gaelic Games is beyond the scope of this report, but it is possible to generate a simple, if crude, measure of the impact of Camogie on the Irish economy. Figures supplied by the Camogie Association reveal that there are currently just under 95,000 participants affiliated to clubs on the island of Ireland (of which 81,000 are junior members).

If the average rate of weekly spending is aggregated to an annual figure, each person who plays Camogie spends around €613 per year on participation, which would equate to €36.3m across the whole economy. Applying equivalent rates for coaches, officials, volunteers and spectators produces a total figure of €81.6m. In short, players, volunteers and supporters spend just under €82m annually on sustaining the game of Camogie on the island of Ireland.

Figure 26 - Social Value – Direct Expenditure

Role	Pop*	Cost per person		Annual Cost
		/week	/year	Total
Participants	94,813	€11.79	€612.87	€58,108,281
Coaches	6,690	€6.85	€356.01	€2,381,733
Officials	5,550	€9.15	€475.74	€2,640,383
Volunteers	11,310	€3.38	€175.92	€1,989,663
Spectators	46,000	€6.88	€357.98	€16,467,225
Total	164,363	€38.05	€1,978.53	€81,587,283

“Players, volunteers and supporters spend just under €82m annually.”

Figure 27 - Social Value – Replacement Value

Role	Pop ^a	Hours per Person		Annual Hours	FTE Jobs	Replacement Value	
	Total	/ week	/ year	Total	Equivalent	Min. Wage	Med. Wage
Coaches	6,690	3.99	207	1,388,142	667	€15,686,001	€28,637,362
Officials	5,550	3.34	174	964,381	464	€10,897,507	€19,895,184
Volunteers	11,310	2.73	142	1,603,836	771	€18,123,345	€33,087,134
Total	23,550	10.06	523	3,956,359	1,902	€44,706,853	€81,619,680

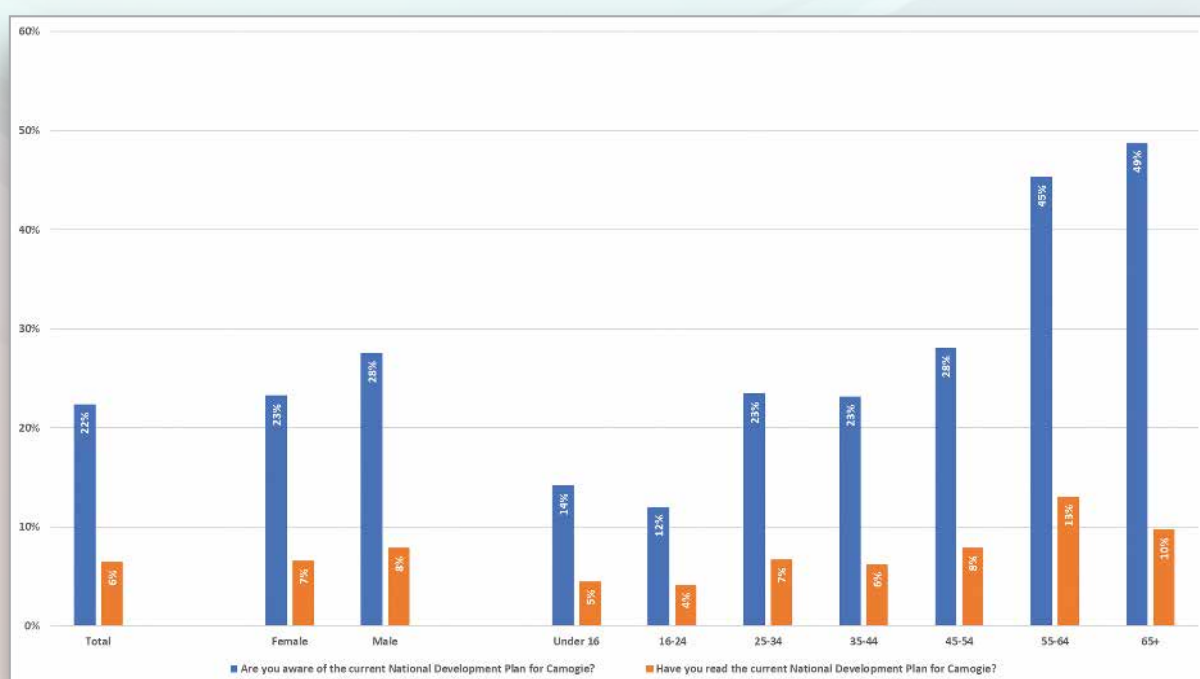
It is also possible to measure social value by calculating the value of the time given by the volunteers who sustain the game. Aggregating the data from the survey provide an annual number of hours contributed by the 23,550 coaches, officials and volunteers who give their time in support of Camogie every year. This can be converted to a figure representing the number of full-time equivalent jobs (assuming an average of 8 hours a day, 5 days a week, 52 weeks of the year). As Figure 27 indicates, based on the responses from the survey, the amount of time contributed would be equal to that of 1,902 full-time employees. At the current rate of the minimum wage, this would cost €44.7m per year, and if the median wage were applied, the replacement value of the time contributed would be €81.6m.

In simple terms then, based on these data Camogie participants and those who support them generate direct spending of €81.6m into the economy of the island of Ireland. The contribution of volunteer time equates to just over 1,900 full-time equivalent jobs with a notional value of at least €44.7m. To place these figures in their proper context, it is interesting to note that in the most recent available financial accounts (for 2022) the turnover of the

Camogie Association, which employed 18 full-time staff, was €2.9m, of which staff costs accounted for just under €1m.

While these estimates present a positive picture of Camogie's impact, some caution is necessary in interpreting the data, due mainly to the assumptions implicit in the calculations. This is particularly true of the estimate of participant spending, which assumes that the average figure of €7.36 per week is applicable to all players, of whom 81,000 (85%) are junior members, many of whom would be under 16 years of age and therefore beyond the reach of the survey upon which these calculations are based. Equally, no attempt has been made to quantify the physical and mental health benefits generated by participation in the sport. It is therefore quite possible that the figures presented here underestimate the true picture of Camogie's social and economic value, though this could only be confirmed through further research. Nevertheless, even as an indicative exercise, this analysis should provoke further discussion of the wider value of Camogie, not just in sport participation terms, but in a broader societal context. The findings are particularly pertinent in light of ongoing research to measure the social and economic value of the Gaelic Games Family.

Figure 28 - Awareness of National Development Plan (NDP)



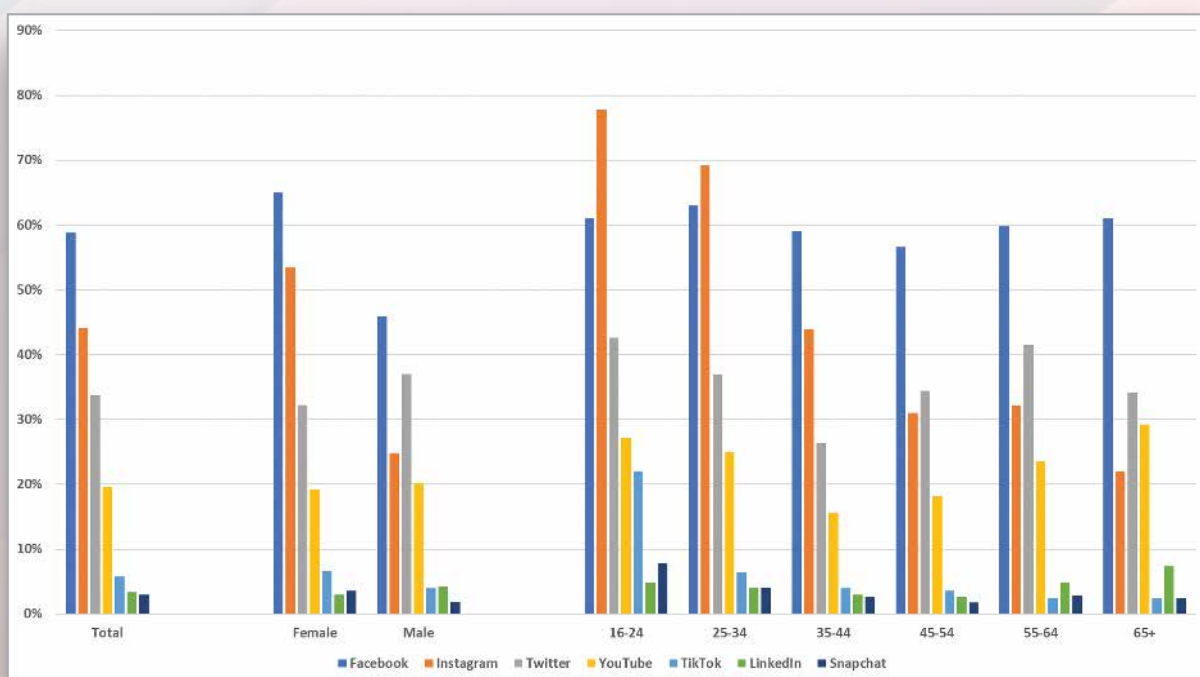
Looking Ahead

The overall purpose of the survey was to provide data to underpin the new National Strategic Plan for Camogie. In this context, survey respondents were asked to confirm whether or not they were aware of the current National Development Plan (covering the period 2020-2023), and whether or not they had read the document. Figure 28 outlines the responses to this question, and underlines two key points. First, only 22% of all respondents are aware of the current plan, though awareness of the document increases significantly with age. Second, an even smaller proportion of respondents (6%) stated that they had read the plan. Moreover, when asked to confirm the four key

pillars of the plan - Passion, People, Pride and Place - only 5% were able to do so (though again, recognition was higher among older respondents). As a measure of the extent to which the aims and objectives of the current plan have permeated throughout the Camogie community, these figures suggest that there is a considerable way to go in communicating the message and ensuring that clubs and counties are working to a consistent agenda which matches that of the national governing body.

One explanation for the lack of awareness of the current NDP could be the low levels of engagement with Camogie Association communications evident in the survey. Only 27% of all survey respondents stated that they received

Figure 29 - Social Media Engagement



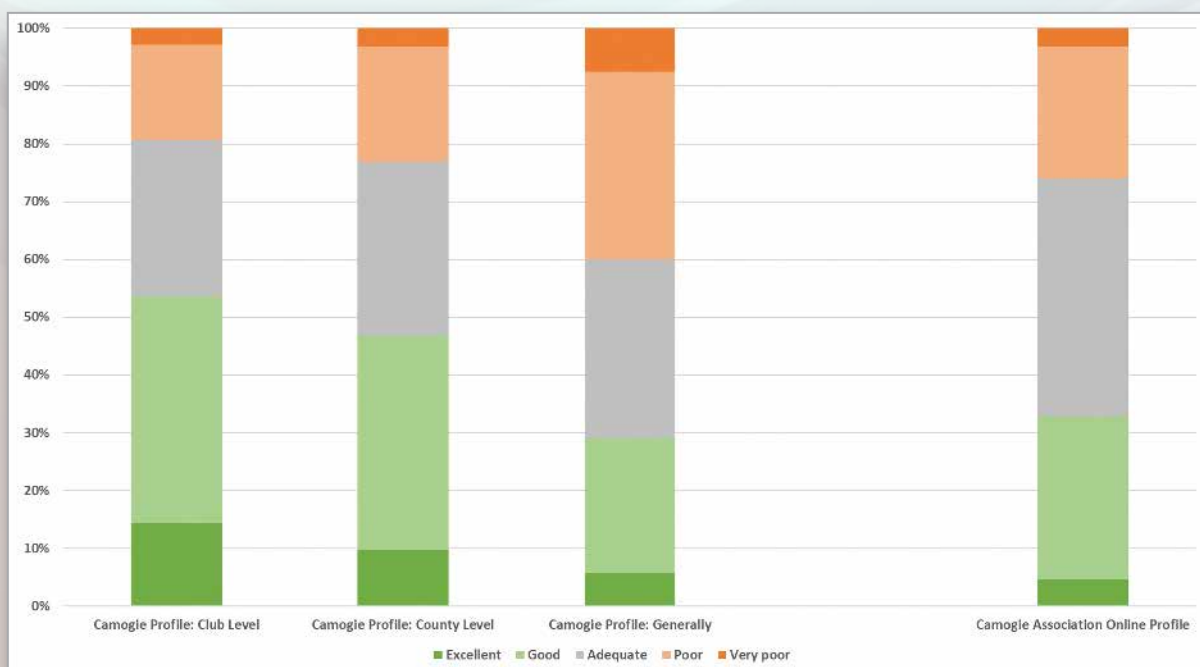
national communications from the Association, though this figure is higher among people in older age groups (35% of those aged 55 to 64). Conversely, there appears to be much more engagement with the Association’s social media output, as Figure 29 makes clear. Facebook is the most popular channel in terms of reach, with just under 60% of survey respondents receiving information in this way, while Instagram is much more popular among young people, with 78% of people aged 16-24 accessing Camogie Association output.

With the exception of Twitter, women are more likely than men to engage with the Association’s social media content across all channels. Twitter (34%) and YouTube (20%)

also appeal to a sizeable market, while the recent addition of TikTok appears to have made some headway among younger people, with 22% of respondents aged 16 to 24 engaging with content on the newest social media channel.

Overall, penetration remains low however, at 6%, while engagement via LinkedIn (3%) and Snapchat (3%), is even more limited. Nevertheless, the data in the graph underline the fact that different channels appeal to different sectors of the Camogie community, and that there is significant potential to engage further with people in ways that match their lifestyle and preferences.

Figure 30 - Satisfaction with the Profile of Camogie



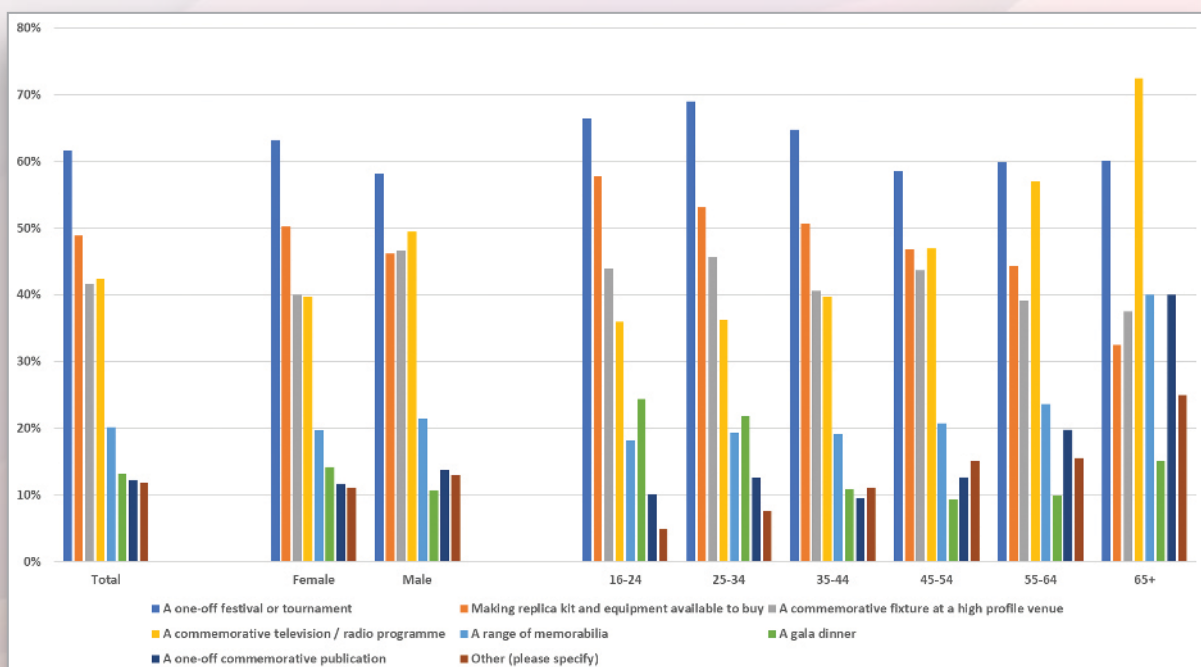
In this context, it is notable that opinions of the Camogie Association's online profile are broadly neutral (Figure 30), with 41% of respondents classifying it as 'Average' and only 5% rating it 'Excellent'. At club level, the profile of the game is rated 'Good' or 'Excellent' by just over half (54%) of the Camogie community, with just under half (47%) expressing a similar view of the game at county level.

Notably, however, 40% of respondents feel that Camogie's

profile in the media generally is 'Poor' or 'Very Poor', and only 29% have a positive outlook in this respect. Taken together, this data may be taken at face value as evidence of a disconnect between the governing body and its constituent counties and clubs. In reality, this is more likely to be a function of personal bias in favour of local connections and a reflection of better familiarity with the work of county boards and clubs at local level.

“42% support the idea of a commemorative fixture at a high profile venue.”

Figure 31 - Suggestions for Camogie's 120th Anniversary Commemorations



There is a more positive picture with respect to prospects for the celebration of the Camogie Association's 120th anniversary in 2024. While only 19% of survey respondents were aware of the significance of the date at the time of asking, the majority in favour of celebrating the anniversary was almost unanimous at 93%. Figure 31 outlines some of the proposals put forward for the commemoration, with a majority in favour of a one-off festival or tournament. In

addition, almost half of the respondents are in favour of making replica kit and equipment available to purchase, while 42% support the idea of a commemorative fixture at a high profile venue. Interestingly, the same proportion are in favour of a television or radio documentary, with support rising to 73% of respondents aged over 65 (a key demographic for broadcasters).

Qualitative Feedback

Figure 32 - What clubs do well



Community clubs provide inclusive and high-standard training and facilities for girls and women in Camogie. They offer opportunities for all ages and skill levels to participate in the sport, with great support for teams and a safe environment for players. Clubs are generally well-organised and well-run, with a strong structure at both underage and adult levels. They encourage volunteerism, participation, and fundraising for child welfare. They also provide coaching opportunities for children and engage with them to play the sport in a fun and family-friendly

environment. They encourage players and volunteers to be part of their club family through social functions, which supports the recruitment and retention of new and existing members and volunteers.

Despite competition from other sports and activities, the commitment of committee members and coaches sustains the game. Clubs promote a positive, welcoming, and inclusive environment which aligns well with the ethos of the sport of Camogie.

“Integration is seen as a unique opportunity for Camogie.”

While there were many positive comments on the plans and actions of the Camogie Association, there was also a significant number of survey respondents who readily identified ways in which the organisation could be more efficient and effective. Many see the Association as a bureaucracy, which currently acts in isolation from the GAA and LGFA. This view fails to acknowledge the significant amount of ongoing work undertaken jointly by the three governing bodies, however. Paradoxically, that same process of integration is seen as a unique opportunity for Camogie specifically, and for Gaelic Games in general.

The single most important change that survey respondents would like to see to the running of the game, is improved co-ordination between Camogie and Ladies Football. This was cited repeatedly as an important way of retaining players, especially at county level, with many examples provided of players being forced to choose between codes when fixtures clash. As well as simplifying the job of county boards, a resolution to this issue would generate additional benefits by making more efficient use of facilities, and encourage better spectator attendance by supporting better promotion.

While the Association's use of the internet and social media is generally well-regarded, survey respondents feel that the

game is treated unfairly in terms of television coverage. Once again, integration is viewed as something of a panacea in this respect, though there are few, if any firm ideas as to how this might transpire.

Other suggestions which might support the continued development of the game include bringing Camogie into line with Hurling by discarding the rules regarding 'shouldering'. Alignment with Hurling in this respect would also simplify the process of recruiting and developing match officials, by making it easier to transition between the two codes. Another area in which respondents expressed firm views was the continued insistence on players wearing skorts. It is clear from survey responses that younger players in particular see nothing wrong with wearing shorts, and more specifically dark coloured shorts.

It is also clear from the survey that respondents feel the Association should take the lead on 'growing' the game. This is not simply a matter of finding more people to play and support Camogie however. Survey respondents were keen to take the game into new territories by developing clubs in 'smaller' or 'weaker' counties, establishing clubs in areas which are currently underserved, and engaging with participants from non-traditional Camogie backgrounds.

Stakeholder Interviews

Following the conclusion of the quantitative survey, a cross section of stakeholders from within the game, and from the broader Irish sporting community were interviewed. Coaches, players, parents and volunteers at club and county level were interviewed, as well as representatives of governing bodies and partner organisations. Each was asked a series of questions designed to dig beneath the surface of the issues identified in the online questionnaire (see Appendix 1). The interviews were recorded and transcribed for subsequent analysis, from which six consistent themes were identified:

- **Participation**
- **Volunteering**
- **Integration**
- **Communication**
- **Marketing and Promotion**
- **History and Culture**

Participation

The raison d'être of any governing body of sport is to continually increase the number of people playing the game which it administers. This view is echoed by stakeholders at every level of the game. At the national level, there is a requirement to demonstrate continued growth to partners and funders as evidence of the progress and development of the game.

The Camogie Association has the primary responsibility for growing the game, but there are various factors that impact participation, such as socioeconomic factors, government policies, and support policies. Increasing participation would benefit Camogie in several ways. It would safeguard the future of the sport, raise standards, and create a strong commercial profile.

At club level, the motivation for increasing participation is much simpler: Clubs want to remain competitive and sustainable in the long term. There is therefore a clear impetus to introduce Camogie to as many girls as possible, and while the survey suggests that clubs are the main location where this takes place, those working at local level believe that schools still have a role to play. Where clubs have strong, effective links with schools, the two settings are generally supportive of each other, but one club volunteer cited an example of the impact of an unsupportive head teacher:

"I could certainly point the finger at the national school. Because this is just my opinion, but the headmaster there doesn't value sports. It's just the way it's set up here. Everything has to be done as an extracurricular activity, which teachers in fairness aren't always inclined to do. It's very hard to get people who are generally involved in the clubs to try to get into the schools. It's all about timing. School is during the day. Most people that are coaching in clubs work during the day when coaching activity takes place during the evenings. And it's not so easy to do that."

The issue of retention, or ensuring that girls continue to play Camogie, is a complex one. Stakeholders recognised the rate at which participation drops as players progress through the education system and into employment, though this is not unique to Camogie specifically or indeed to sport in Ireland more generally. The barriers which present themselves, particularly as girls enter their teens, are often related to issues of self-image or self-esteem, while some club level stakeholders admit that competing interests (such as school, other sports, social activities) often divert players away from involvement in the game. Negative participation experiences can have a significant deterrent effect on continued participation. Club-based stakeholders referred to a number of factors which may reduce participants' motivation to play and train,

“ Social participation is one means by which women and girls might stay engaged with Camogie.”

including: limited playing opportunities for weaker players; one-sided or mismatched fixtures; coaching and selection which emphasises winning over enjoyment, and; not feeling part of a team due to social 'cliques'.

It is clear that for many participants, the desire to play both Camogie and Ladies Football is fundamental to their continued engagement with Gaelic Games. However, fixture congestion is frequently cited as a significant barrier to the progress of teams and individual players, with a perception that many clubs give priority to football. While the one club model of administration is seen as helpful in securing access to more sympathetic pitch times, it is by no means a panacea. There is concern, at least in some quarters, that Camogie players and teams will continue to be squeezed out, with negative consequences for the game in the long term. Again, at club level, the impact is more immediate:

“We're a dual club. I think if we focused on one [code], we'd probably win a lot more, but we always get caught at the end of the season with really important knockout games coming one day after another. So for example, one day we had a football semi-final and it went to extra time. And we managed to win that and had to get up the next morning and play a knockout over again.”

Throughout the survey and the qualitative discussions which followed, the issue of social participation was pertinent to the debate. The concept of retaining participants also extends to those who are keen to be physically active, but are less enthusiastic about competition. Social participation is one means by which women and girls might stay engaged with Camogie, without the formality involved in competitive sport. It appears that some clubs are using this approach successfully as part of a broader programme of social activity designed to engage with women who have been

active in the past, or who are looking for new ways to participate. In doing so, they are not only mirroring the approach of other sports, including other games within the Gaelic Games family, but they are also generating additional benefits. Specifically, social participation is an exceptionally effective recruitment tool for volunteers, and it is to this aspect of Camogie the discussion now turns.

Volunteering

Club-based stakeholders understand the need to continuously identify and engage with volunteers to support the delivery of Camogie at local level. Interestingly, a consensus emerged during the interviews as to the best way to achieve this, focusing on social activities as a means of drawing in people who will take on tasks which underpin activity within their club. Whether it be Social Camogie or other non-Camogie activities staged in an informal environment, the social aspect of the sport at club level can sometimes be overlooked in terms of its importance as a networking tool. Personal connections between members can be exploited to draw on their skills and abilities:

“The main objective of Social Camogie is to provide a social forum for people to participate, particularly those who have drifted away from the game or who were never involved to begin with and are new to the sport but have become involved as a result of their daughter's involvement. But there is a secondary objective. This is a prime opportunity to identify people who can support the game through volunteering by giving them little jobs to do which may lead to them becoming involved in a more formal way.”

The intention of all stakeholders at every level, is to find, develop and retain as many volunteers as possible to ensure that the overall workload required to plan, deliver and sustain Camogie is shared widely and fairly.

One club-based stakeholder advocates avoiding the use of the term 'volunteer' altogether, preferring to refer to helpers among the membership, and reinforcing the sense that overt volunteer recruitment is less effective than the more organic, incremental approach outlined above. Interestingly, sport industry practitioners agree that this is more sustainable in the long term, though one stakeholder advised that:

"The Camogie Association should also consider the practicalities of recruiting and retaining volunteers. They should ensure that the time spent on volunteering is used to maximum effect for the organisation and that the person enjoys it. This can be achieved by providing a kind of work-life balance, ensuring that volunteers feel comfortable and motivated to contribute to the club's success."

One more recent development which has been welcomed universally is the adoption of the One Club delivery model. This is already proving its worth at the local level, by reducing the level of duplication and of effort implicit in running separate entities for Camogie, Ladies Football and other Gaelic Games codes. This has led to economies of scale for clubs and individuals alike, with dual code players being only required to complete a single affiliation. As one volunteer from Leinster explained:

"Our treasurer is happy because we've saved on insurance and we haven't had to hire pitches from the council so often because we've been able to plan things better. And the players like it because they only have to register once. So they pay one [subscription] fee for the year, instead of two."

On a purely pragmatic level, the One Club model has simplified volunteering structures, reduced duplication, and helped to resolve conflicting schedules, as well as generating savings of time and money for clubs and

individuals. In broader terms however, the more significant benefit of club-level integration is that Camogie volunteers are working collaboratively with their counterparts from other codes, as another volunteer testified:

"There is a lot more alignment and collaboration, a lot more engagement, a lot more uniformity. There's a little bit of a journey but it's infinitely better than what it was prior to the One Club initiative. Ultimately, I suppose we're all paying club members. So I suppose you want both male and female members to get equal opportunities in terms of the resources and One Club seems to be on the right path in that context."

Integration

By extension, with goodwill in evidence at club level, the general expectation is that the proposed integration of Gaelic Games governing bodies is now inevitable.

Interviewees were consistent in referring to 'when' integration is going to happen as opposed to 'if', and were equally consistent in identifying positive outcomes which might result from the process. Foremost among these is the resolution of conflicting training and playing schedules which interfere with the scheduling of Camogie and Ladies Football, with the expectation that participation in both codes will increase (primarily through higher retention of existing players).

"You know, we need to move forward really. Like I met with the Chairperson of the of the football club last week and I just sat down and I said, "Look, let's work together." I said, "The guys want us, we'll do it. Whatever it takes, let's work together and put the players first." And the response was 'Yeah!'"

“One Club model has simplified volunteering structures and reduced duplication.”

The apparent enthusiasm for integration masks a note of caution on the part of Camogie stakeholders however. There remains a considerable amount of work to be done to achieve full integration of three governing bodies, with their own history, culture and ways of working. Some stakeholders are concerned that Camogie may lose something of its identity in being absorbed into a larger organisation with multiple responsibilities. One senior sport practitioner described integration succinctly, if not humorously, as being “like going from being in the rebel alliance to joining the Death Star!”. Nevertheless, volunteers are more than able to identify potential pitfalls, as well as possible solutions:

“It’s a cultural thing within the GAA. It’s a very male-orientated organisation. I mean, it’s actually bonkers when you’re looking at it. If you were from another country and you came in and looked at the way the GAA was set up you’d probably say, you know, ‘where are the women?’ ... But in order to break down those barriers, they need to be working together, I suppose. It has to be led from the front. Has to be done from the top. You know, definitely it has to be led from the top.”

While many stakeholders harbour the belief that integration will resolve issues of access to (pitch) facilities, (clubhouse) amenities and scheduling of fixtures, which have been seen to hamper the development of the game for some time, there remains the risk that expectations will exceed reality. Several stakeholders at club level identified issues with county boards which suggest that the transition will not be entirely smooth.

One volunteer provided an example related to the scheduling of fixtures:

“It’s just not working the way it is. I was the Secretary for the Camogie club, and I did suggest at a meeting that we have a liaison officer for fixtures to work with the Ladies Football, and they would have a corresponding liaison officer for that. I was told ‘no’ by the county board, so the idea was kind of dead in the water.”

The Camogie Association, and the clubs and players it serves should benefit in the long term from integration with the GAA and LGFA. Nevertheless, to be successful, the process itself will require caution and compromises on all sides:

“The assumption is that integration will happen, is inevitable and will have everyone’s understanding. However, there are twin pressures to consider: keeping momentum and taking great care moving forward. Missteps can become the DNA of the new organisation, so there is a strong awareness that this is an extremely vital phase and that they must move forward with a high degree of care.”

Communication

One of the ways in which the Camogie Association will be able to address the concerns of its members, participants, volunteers and supporters is through clear and consistent communication. Members expect, and have every right to expect the Camogie Association to be proactive in sharing information which might be relevant to their involvement in the sport. Some volunteers feel that the Association, as one club-based volunteer explains:

“Communication is massive you know. Now I see [our members] stand and shoulder to shoulder on a pitch wanting both Associations to move forward and get better rights. And if we don’t, if we don’t keep going, we’ll lose our voice in the new organisation.”

In 2023, high profile incidents which have generated negative publicity in the media (such as the debate over Kildare's entry into the Senior Championship, and the withdrawal of player cooperation in advance of the All-Ireland final) run the risk of creating a negative impression of the Association itself. In the case of the former however, the Association was not directly involved in the dispute, and acted as intermediary in resolving the argument. Nevertheless, the Kildare issue was one of several examples which, fairly or unfairly, were deemed by some stakeholders to be the responsibility of the national governing body, regardless of their actual role. This serves to underline the importance of communication to the effective operation of the Camogie Association, and the need to build capacity, both centrally and at county level, to improve the flow of information in all directions.

Promotion and Marketing

Above all else, members want Camogie to be visible. There is little doubt that supporters of Camogie are passionate about their involvement in the game and would like to share their enthusiasm with others. The way the game is promoted is critical to its continued success, especially in a competitive market for the attention of fans in the broadcast media.

"The profile of the game could be raised by challenging media and broadcasters to give equal coverage to Camogie as it does to Hurling. There are instances of high profile Camogie games being ignored, which should always be challenged from an equalities perspective. Games are missing from previews and highlights programmes when lesser games on the men's side receive all the coverage that they need."

The irony here however, is that demands for increased

visibility in any sport are usually driven by those who are already connected to it in some way, a fact recognised by at least one partner stakeholder:

"The horse must lead the cart: it cannot be the other way around. The commercial profile goes from participation, and having more TV viewership figures does not necessarily mean more participation."

Recent initiatives in other women's sports offer a template for the Camogie Association, and stakeholders from other organisations feel that there is much to be gained from looking further afield in exploring ways to promote and market Camogie to new and existing audiences. Key to this is the need to consider non-traditional markets for the game. Sport industry stakeholders suggest that opportunities are currently being missed to engage with people who had never previously engaged with Gaelic Games, particularly among migrant communities.

The identification of role models around whom a narrative thread can be built, is thought by sports professionals to be crucial. Again, positive examples from other sports demonstrate the value of personalities who become ambassadors and, with whom participants, volunteers, coaches, officials and spectators alike can identify. One aspect of the marketing mix which sports professionals felt needed to be addressed urgently is that of branding. The current Camogie Association logo is thought to be dated and old-fashioned, making it hard to read and reproduce.

"The typeface is not contemporary. The way the logo is designed is not contemporary. So, the sport is conspiring almost to keep itself looking old and fuddy-duddy, when there is an opportunity to be really exciting and vibrant"

“Members want Camogie to be visible.”

and address the new young woman, who is not afraid to express themselves, not afraid to get him involved in a very connected sport, a very dynamic sport. And therein lies the challenge and the opportunity.”

Similarly the approach to kit positions Camogie in the direct opposition to many of its competitor sports. There was consistent criticism from players, and those who support them, of the continued refusal to allow players to wear shorts during games, which many feel amounts to a victory for tradition over pragmatism, particularly when other sports have changed their rules to reflect player demands. Camogie is seen as increasingly isolated in this respect.

IN SUMMARY:

Participant retention is key to growth.

- As a governing body, the critical issue for the Camogie Association will always be the number of people playing the game.
- That girls are being introduced to the game (mainly in clubs) is not in doubt (though all educational settings have a role to play).
- There is recognition from all quarters however, that participant drop-off at key life stages interferes with player progression and reduces the overall player base.
- There are specific issues for women and girls which affect retention in different ways to male participants (kit, body image, athleticism).
- Volunteer recruitment is best done socially.
- Most volunteers engage as a result of a child's participation, confirming the family ties that underpin Gaelic Games.
- Once children grow up and, in many cases, move on, the challenge is to work out how to maintain the connection with the volunteer.

- The most significant issue in volunteer terms is that women are significantly under-represented among the coaching workforce.

Volunteer recruitment is best done socially.

Most volunteers engage as a result of a child's participation, confirming the family ties that underpin Gaelic Games. Once children grow up and, in many cases, move on, the challenge is to work out how to maintain the connection with the volunteer. The most significant issue in volunteer terms is that women are significantly under-represented among the coaching workforce.

Insecurity of facility access hampers development

- Historically, Camogie has had to fight for equal access to training and playing facilities. This hampers player development, and has an impact on planning fixtures.
- The more significant issue, however, is with the scheduling of fixtures with respect to Ladies Gaelic Football competitions, with some high-profile clashes at club and county level.
- Educational facilities offer some potential to relieve pressure on club pitches.
- Communication is and will be crucial.
- Views on communication are mixed, reflecting dissatisfaction with some elements of how clubs, counties and the Camogie Association's approach this task.
- No question that the profile of the sport could be higher, and members clearly want Camogie to be more visible in broadcast media.
- Use of social media is critical, and needs to take a 'horses for courses' approach – younger players are increasingly rejecting traditional media channels.

- Importance of communication takes on additional significance in light of integration.
- Latent demand for social activities and informal participation.
- Clubs are offering a wide range of social activities, despite limited access to facilities in many cases. Informal physical activity opportunities are commonplace and include other Gaelic Games codes.
- There is evidence of some latent demand for Rounders, as one example of a social sporting activity.
- The more significant issue is the high proportion of Camogie players who are also active in Gaelic Football, and how to accommodate their desire to play both codes.

The cultural and historical significance of Camogie is underplayed

- In light of the prevailing attitude towards traditional kit rules, it is interesting to note the recognition among many stakeholders of Camogie's importance to the historical and cultural fabric of Ireland.
- Sport industry professionals highlighted the position of the Camogie Association as one of the earliest recognised national governing bodies of women's sport.
- This historical significance is thought by some in the profession to be somewhat underplayed and is one aspect which could feature in future marketing plans.

Awareness of planning processes is patchy

- 'Market' penetration of the National Development Plan is low among those most affected by its outputs.
- This is reflected in low levels of understanding of Camogie Association's input, and low satisfaction with Camogie's profile.

Integration should unlock economies of scale across the Gaelic Games Family

- There is significant optimism that integration will improve access to facilities, and an acknowledgement that this will take time to implement successfully.
- It is recognised that integrated ways of working are in place at a local level through the One Club model, which offers the simplest template for future development.
- Some interviewees expressed concerns that integration would see Camogie dissolve into a larger Gaelic Games entity at the expense of the qualities which make the game unique.
- Others would like to see integration go further, to increase the physicality of the game and align more fully with hurling.
- A hope expressed by many is that the integration of the administrations running Ladies Gaelic Games will resolve the majority of fixture conflicts, releasing the best players for the most significant games.

Monitoring of progress will be crucial

- As a baseline study, this work sets the context for work on the revised Strategic Plan, and establishes the benchmark against which progress should be made.
- The breadth and depth of information presented here provides significant food for thought, but the key consideration is how progress will be measured as the new NDP is implemented.

CONCLUSIONS AND RECOMMENDATIONS

This baseline exercise has generated a significant amount of primary data which identifies the most significant issues currently facing the game of Camogie, its participants, and supporters. While the primary focus is on individual engagement with Camogie, connections with clubs, counties

“Camogie is dependent on its volunteer workforce.”

and other codes in the Gaelic Games family are made throughout to contextualize the position of game in the Irish sporting landscape. The results presented here are distinct from previous research into Camogie and should not be compared directly with previous surveys. However, an improved understanding of the baseline position is timely and essential to developing plans for continued growth in the months and years ahead.

Recommendation 1: The Camogie Association should support the delivery of positive Camogie experiences in educational institutions with well-defined links to local clubs.

The survey suggests that a significant shift has taken place in terms of where participants are introduced to the game. While older players tended to have their first experience of Camogie in a club environment, younger people increasingly try the game in school first. This reflects positively on the continuing efforts by the Camogie Association to ensure that Camogie features on the PE curriculum in schools, particularly primary schools. This investment of resources in school-based provision is a significant shift, albeit one which is broadly welcomed by supporters of Camogie.

The most significant returns on that investment occur when there is a clear and reliable pathway from schools to clubs, which is itself dependent on volunteer capacity at local level. Further, the investment in provision in educational settings should not be confined to primary level. The consistent message emanating from analysis of qualitative data collected for this research is that the Camogie Association should focus its attention on the high rate of drop-off in participation among girls in post primary education. This is not unique to Camogie by any means, and there are significant parallels with other sports in Ireland and overseas. Nevertheless, as a female only

sport, Camogie should consider how to continue to provide opportunities for young women and girls to discover, develop and deepen their affinity for the game.

Investment in school-based provision presents the ideal opportunity to take the game to non-traditional communities across the island of Ireland. For example, there is currently one county with no affiliated clubs (Fermanagh) and four counties with five or less clubs (Leitrim, Mayo, Monaghan and Sligo).

Successful delivery in the school environment should (in time) lead to demand at club level, and the Camogie Association should consider how to prepare the ground for the formation of new teams and clubs in future. There is much to be gained by stimulating demand for Camogie through school provision in areas and communities where the game does not currently have a significant presence.

Recommendation 2: The Camogie Association should recruit, recognise and retain a skilled, motivated, and pro-active volunteer workforce to support the long-term sustainability of the game.

As an amateur sport, Camogie is dependent on its volunteer workforce which commits a significant amount of time and money throughout the year to supporting the game at club and county level. The survey makes clear that volunteers at local level have a clear idea of what the local issues are, and how to resolve them, often more quickly than a county board or indeed the Camogie Association at national level.

It makes sense for them to act with autonomy where appropriate. The Association's role is to ensure that in doing so, they adhere to the standards and ethos of the sport. This can be achieved primarily through the existing programme of training and development, which is well regarded by volunteers and administrators.

The most pressing need is to consistently recruit and retain the volunteers who will support the game of Camogie at all levels. The results of the survey confirm that there are significant numbers of people with abilities and attributes that would be of use to the administration of the game. Nevertheless, one of the key concerns of potential volunteers is the extent of demands on their free time. This reality is, however, that volunteers contribute an average of only 1.2 hours per week, and while this level of time commitment may vary depending on role, club and location, the headline figure of 72 minutes represents a useful promotional 'hook'.

The challenge, therefore, is to identify the most effective way of matching individuals with the right skills to support Camogie with opportunities at club, county, and provincial level, and incentivise them to offer those skills to the game. Here again, the baseline data offers a possible solution. Survey respondents and interviewees alike cited the use of informal participation and social activities as a means of approaching potential volunteers, inviting them to undertake informal roles initially, and increasing their involvement over time. The barriers to volunteering are often more a matter of perception than reality, and the pragmatism expressed here offers an elegant solution to an ongoing issue common to all sports which are supported by volunteers.

The profile of volunteers in any sport should reflect the people who play the game. It is essential that the proportion of female coaches, umpires and administrators increases steadily and permanently. This has additional long-term benefits for Gaelic Games in a broader sense, in that women could and should play a larger part in the coaching workforce for hurling. Furthermore, Camogie, along with other sports on the island of Ireland, has a role to play in reaching out to new communities and those from non-traditional Gaelic Games backgrounds.

Recommendation 3: The Camogie Association should explore all available options to improve access to high quality sports facilities for training and competition.

While significant progress has been made in recent years, access to training and playing facilities of sufficient quality continues to present a barrier to the development of the game. Camogie clubs are increasingly transitioning to a One Club model in which resources are shared with GAA and LGFA organisations. There is a clear expectation that access to facilities will improve automatically, though this is by no means a foregone conclusion. The integration process will take time and a significant amount of negotiation to come to full fruition.

In the meantime, there are several opportunities to ease the pressure on existing facilities. For example, by taking a proactive and collaborative approach to fixture scheduling in conjunction with administrators from the GAA and LGFA, the Camogie Association could help to ensure equity of access to pitch facilities for its clubs and participants.

The Association also has a role to play in advocating for a fair allocation of resources from agencies which support sport through capital investment in facilities on the island of Ireland, including Sport Ireland, Sport Northern Ireland, and the various local sports development partnerships. Being able to demonstrate demand for pitch space is clearly critical to making a persuasive argument in this regard, which underlines the need for high-quality data relating to participants, teams, clubs and county panels. It is to be hoped that the increasing use of the Foireann database will facilitate this in the medium to long term.

“**Camogie receives less coverage than it merits.**”

In the meantime, the focus of the Camogie Association's attention should be on identifying and securing access to existing facilities. Continued delivery in educational settings offers some scope for growth in this regard, if relationships which have already been established can be embedded and consolidated. Post-primary and third-level sites could present a convenient and ready-made solution to facility shortages, to the benefit of clubs, counties, schools and colleges alike.

Recommendation 4: The Camogie Association should improve communication channels by building skills and capacity at all levels.

The issue of communication was raised repeatedly in the course of both the online survey, and the qualitative conversations with the game's participants and stakeholders. There was almost unanimous agreement that participants, volunteers, and administrators should be more forthright in supporting the promotion of Camogie, and enable the sport to take its place at the heart of the national sporting conversation. That process is hampered however, by issues of capacity at all levels of the game, as well as by the current complexity of Camogie's relationship with other Gaelic Games codes.

At club level, Camogie is often perceived to be the poor relation by comparison with (men's and Ladies) football and hurling, though there is much praise from survey respondents and stakeholders alike for the One Club model of integration. Ironically, this only serves to underscore the most significant concern with regard to communication: the planning of fixtures. Evidence from the survey and the qualitative interviews suggests that the planning of club and inter-county fixtures takes place without reference to other Gaelic Games codes,

generating frequent clashes of timing with Ladies Football in particular. The need for improved communication between the games' governing bodies is therefore paramount, and one of many issues for which integration is seen as the simplest solution.

Nevertheless, many supporters feel that Camogie receives less coverage than it merits, though club fixtures are perceived to have a higher profile than the county game. Communication from county boards and from the Camogie Association itself is crucial to maintaining visibility, and it is therefore surprising to note that only one in four survey respondents receives national communications from the governing body, despite significant levels of engagement with the Association's various social media channels.

Equally, only one in four people involved in the game are aware of the current National Development Plan, and one in five know of the Association's 120th anniversary next year.

The challenge for Camogie is to increase the visibility of the game in an already crowded sporting media landscape, while maintaining its traditions and values. It is also increasingly clear that younger players and volunteers are using different channels to access the information that supports their engagement with the game. The adoption of social media necessitates a different approach which is more immediate and less formal than traditional methods of communication. It is therefore crucial that Camogie continues to build on its recent successes in exploiting the benefits of social media, if it is to maintain its relevance for current and future generations of participants and supporters.

Recommendation 5: The Camogie Association should support clubs to diversify, offering other opportunities within communities to increase levels of physical activity and social engagement.

It should be abundantly clear from the evidence of this research that involvement in Camogie has a significance which extends far beyond merely playing the game itself. Camogie clubs are communities of interest which give a sense of identity to their members and supporters. They offer a broad range of opportunities for physical and social activities which provide a safe and secure supportive network for their members. In short, they provide a form of social capital which would be hard to replicate elsewhere.

The scope and extent of these non-Camogie activities is therefore unsurprising, but there is a clear motive for clubs doing more than just training and playing. Social activities are not only one of the most effective ways of raising funds to make clubs more sustainable financially, but they also serve as an important means of recruiting volunteers. While it has not been possible (within the scope of the current research) to establish a causal relationship between social engagement and club development, the data make it clear that demand exists for clubs to do more in this regard. It is particularly striking that those who are already involved in Camogie feel that their clubs should be reaching out more to engage with the wider (non-traditional) community.

Nevertheless, there are intrinsic and incidental benefits to be gained from broadening the range of activities within Camogie settings, not least the improvements to physical and mental health which arise from walking, running, cycling, dance and fitness. Individuals, clubs, and counties also benefit from the networking opportunities

that arise, which allows information to be shared and ideas exchanged. It is clear that clubs are already delivering on this agenda to the extent that physical activity opportunities of various kinds are offered in so many clubs. The unmet demand however, is for social activities, particularly those which encourage clubs and individuals to reach out to new participants and audiences.

Recommendation 6: The Camogie Association should support provinces, counties and clubs to develop long-term strategic plans with the intention of achieving recommendations 1-5.

Analysis of the qualitative data from the survey reveals that the delivery of the game at club and county level is often perceived to be ad hoc, piecemeal, and at odds with the aims and objectives of the Camogie Association. In this context it is perhaps unsurprising that only 7% of survey respondents have read the current National Development Plan, and 3% correctly identified its four pillars. As a measure of the extent to which the strategies and objectives of the Association have permeated to grassroots level, this is stark evidence that there is a considerable way to go.

The low level of recognition of the National Development Plan underscores and to some extent explains why planning at club, county and provincial level should be (or at least perceived to be) so fragmented. It is almost impossible to align local or regional plans for the development of Camogie with national priorities when the framework is so poorly understood. While it could be argued that this is simply an issue of communication, it is more accurate to say that the process of strategic planning is poorly understood, and low on the list of priorities for voluntary sports clubs who live from day-to-

“Build on the opportunities that will be afforded by the integration of Gaelic Games Governing bodies.”

day. Clubs typically see few, if any, tangible benefits from projecting years into the future, when the focus is on the coming days, weeks and months.

Furthermore, clubs often lack the capacity to undertake this work, especially when short term demands on volunteer time are prioritised to fulfil fixtures in the process. It is therefore sporadic in extent and inconsistent in execution. **The Camogie Association’s role should therefore be to provide clubs and counties with the support necessary to develop long term strategic plans which align with the aims and objectives of the national governing body.** The development of the new plan represents an ideal opportunity to promote this by developing tools and templates which can be rolled out and replicated on a large scale.

Recommendation 7: The Camogie Association should build on the opportunities that will be afforded by the integration of Gaelic Games Governing bodies: efficiency, efficacy, economies of scale the opportunities afforded by the integration of Gaelic Games governing bodies: efficiency, efficacy, economies of scale.

It is increasingly clear that the debate over integration has moved on from the question of ‘whether’ it will happen to ‘when’ and ‘how’. This survey and others have identified widespread and deep-rooted support for integration, as well as a wide variety of ways in which the process could make the administration governance of Gaelic Games more efficient and effective. Integration is undeniably one of the most significant opportunities for the development of Camogie in a generation. There is there is understandable excitement among supporters of the game at the prospect of increasing at

a stroke the resources available to players, coaches and administrators.

Alongside this optimism, there is caution and concern from many within the game, who worry about the potential loss of Camogie’s distinct identity. Equally, if the administration of the game is subsumed into a larger entity, survey respondents and interviewees expressed fears that control of the game’s future will no longer be in its own hands. In this context, recent statements by an Iar Uachtaráin, Mary McAleese, should provide some reassurance. There remains a healthy level of caution towards integration however, which cannot and should not be ignored.

That said, the integration of the governing bodies responsible for administering Gaelic Games could and should help to resolve many of the more significant issues which have been identified as hindering the growth and development of Camogie. If managed correctly, integration will filter through the game from top to bottom, bringing with it a number of advantages: increased access to facilities; improved financial, coaching and administrative resources; reduced duplication of volunteer effort, and; fewer conflicts of interest. The most immediate benefit should be better scheduling of club and county fixtures.

This will not happen without incident however, and it is the responsibility of all interested parties, but especially those charged with the responsibility of running the game, to ensure the best possible outcome for Camogie.

Recommendation 8: The Camogie Association should commit to an ongoing programme of research which exploits existing information resources and develops new insight through targeted data collection.

The survey of 5,000 people upon which this study is based has established a baseline position for the game of Camogie which reflects the state of play in 2023. As the title suggests however, the research does not show progress or direction of travel. The outcomes of the baseline study can only take on their full significance if the exercise is repeated at some point in the future.

Nevertheless, as the national governing body for the sport, the Camogie Association already collects a significant volume of regularly updated data through its affiliation and registration processes for clubs, coaches, and volunteers.

It is entirely legitimate for the Association to utilise this resource to improve its administration and develop an even better understanding of its position in the context of sport and physical activity on the island of Ireland. Further, as integration progresses, the Association will be able to make increasing use of shared information resources, especially the Foireann database of GAA members.

By understanding and utilising existing data to the fullest possible extent, the Association will release additional capacity and resources to explore additional research questions which lie beyond the scope of the current exercise. These might include:

- **What is the state of readiness of the existing coaching workforce?**
- **What is the extent of the shortfall in the number of match officials?**

- **How much investment is required to develop new facilities/upgrade existing pitches?**
- **What is the best way to develop a Camogie presence where none currently exists?**

It is also important to highlight one further research question resulting from the analysis of the data in the survey: that of the value of Camogie to the economy and to society in general. An initial attempt to estimate the value of the sport to the island of Ireland suggests an economic impact many times larger than the financial input of the Camogie Association (as measured by the size of its annual budget). However, this crude calculation does not take into account the value of the physical and mental health benefits resulting from participation in physical activity, which other organisations (notably Sport Ireland) have explored in some detail. This is another avenue of investigation which the Association might consider exploring in making the case for continued investment in the sport.

In the meantime, the implementation of the new National Development Plan for Camogie will necessitate continued monitoring of progress against the aims and objectives of the Association. This will require careful consideration as to which datasets are the most appropriate and relevant measures of strategic and operational performance.

David Barrett, Sport Industry Research Centre
August 2023.

“Value of the physical and mental health benefits resulting from participation in physical activity.”

Appendix 1 –

Qualitative Interview Question Schedule

Ice-breaker

- What is the most positive thing that has happened at your club in the last 12 months?

Theme 1 – Changing the Game

- What is the most significant issue currently facing the game of Camogie?
- In your view, what would be the best way to resolve this issue?
- What currently prevents this from happening?
- Who should take responsibility for making this change?
- What other benefits would be derived from making this change?

Theme 2 - Volunteering

- How could the Camogie Association support clubs to recruit and retain more volunteers?

Theme 3 – Camogie's Profile

- How could the Camogie Association improve the profile of the game?
- How should the Camogie Association celebrate its 120th anniversary?
- How can the Association make the all-Ireland final more of a Camogie occasion?

Theme 4 – Planning the Future

- What action could the Camogie Association take to grow the game in your area?
- What would you like the Camogie Association to focus on in the new National Development Plan?

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GAMOGIE
ASSOCIATION**