

IMPACT OF COVID-19 ON COMMUNITY SPORT

SURVEY REPORT JULY 2020



CONTENTS

EXECUTIVE SUMMARY	05
PREAMBLE	07
About the Australian Sports Foundation	
About this research	08
Community sport in Australia	
Survey Responses	09
By Sport	
By Location	10
By Club Type	12
IMPACT OF COVID-19 ON COMMUNITY SPORT	13
1. COVID-19 has cost community sports clubs an estimated \$1.6bn to date	15
2. The shutdown of community sport has had a profoundly negative social impact	19
3. The crisis is just beginning for community sport	23
Financial challenges	25
Decline in participation of Members/volunteers	26
4. Overall, one in four community clubs risk closure	31
5. Community sports clubs need a \$1.2bn funding injection	34
6. Conclusion	36

CONTENTS

APPENDIX	37
A. RESPONSE DATA	38
Method for Extrapolating Club Numbers	
Survey Response Numbers by Sport	39
B. FINANCIAL DATA	41
Free Text Calculation Method	
Financial Brackets	42
Negative Financial Impact	43
Negative Financial Impact of “Typical” Clubs	44
Future Funding Needed	45
Future Funding Needed by “Typical” Clubs	46
Aggregate Financial Data	47
Future Funding Needed by Most Specified Clubs	48
C. STATE DATA	50
D. COMMUNITY DATA	54
INFORMATION FOR MEDIA	56

EXECUTIVE SUMMARY

The survey results show that community sports clubs are at a crisis point and thousands need urgent and co-ordinated financial support to survive. Key findings include:

- Australia's 70,000 Community sports clubs have **lost an estimated aggregate \$1.6bn** to date due to COVID-19. For Small Local Clubs, the average amount lost to date is around \$14,900, while for Larger Local Clubs, the average amount lost to date is just over \$37,000;
- The shutdown of community sport from March onwards has had a **profound social impact** on community sports participants, with a contemporaneous research study showing around **1 in 3 respondents reported worse physical and mental health** compared to the year before;
- The return to sporting activity does not mean the crisis is over - indeed, it is just beginning. **Community sports clubs face multiple challenges in the months and years ahead**, including reduced revenues and increased costs, putting their financial sustainability under threat;
- Nearly **70% of Small Local Clubs forecast a decline in active participants** and **43% project a decline in volunteers**. At the same time, around **a third of clubs project increased demand for community sport** post lockdown, putting them under **increased pressure they may be unable to meet** due to financial constraints and lack of volunteers;
- Overall the combination of reduced revenues and increased costs mean that **one in four respondents feared for their club's solvency** - indicating over 16,000 community sports clubs nationally are thought to be at risk of closure;
- On average, Small Local Clubs require additional funding of around **\$12,600 per club**, to assist them through the return to sport, and Large Local Clubs require around **\$26,800 per club**;
- While these are relatively small amounts per club, in **aggregate the funding required is significant at \$1.2bn**. This is broken down between \$594m for Small Local Clubs, and \$613m for Larger Local Clubs;
- Approximately **\$300m** is needed for clubs most at risk **within the next 3 months**, and a further **\$400m** for clubs at risk **within the next 6 months**.



Our task now is to help community sport survive COVID-19.

Having highlighted the unfolding crisis and now quantified the scale of the problem, we aim to work with Australia's political, philanthropic and corporate leaders - and everyone who cares about the role community sport plays in our way of life - to help solve the issue.



On behalf of the Australian Sports Foundation we call on all who care about community health, and who see sport as part of the fabric of Australian life, to join us in our campaign to help community clubs survive.



Patrick Walker

CHIEF EXECUTIVE OFFICER

Mark Stockwell

CHAIR OF THE BOARD



PREAMBLE

ABOUT THE AUSTRALIAN SPORTS FOUNDATION

The Australian Sports Foundation is Australia's leading non-profit sports fundraising organisation and charity, and the only organisation to which donations for sport are tax-deductible.

Sport is at the heart of every community in Australia. It has the power to enhance lives; it improves physical and mental health and brings people together in a way that little else does. Sport is fundamental to the Australian way of life, and our mission is that everyone in Australia, regardless of background, ability or culture, has access to the health and social benefits of sport.

In the last 30 years we have distributed hundreds of millions of dollars to Aussie sports clubs to help develop an inclusive and active sporting nation, and to strengthen local communities.

We are committed to an Australia where everyone can play.

ABOUT THIS RESEARCH

COVID-19 has had a dramatic impact on sport in Australia and throughout the world. Much of the focus from media and governments has been on elite sports – with the shutdown creating a huge financial impact on professional clubs and competitions and the postponement of the Tokyo Olympic and Paralympic Games gaining understandable attention.

However, the shutdown of community sport has affected the day to day lives of millions of Australians in communities all over the nation. During March and April, community sports clubs were telling us that COVID-19 presented a real threat to their sustainability and viability. So in May 2020, the Australian Sports Foundation opened a [survey](#) to collect detailed information on how the COVID-19 crisis has affected community sports clubs, its participants, and its volunteers.

Our purpose in doing so was to shine a light on the unfolding crisis among community clubs and to use the data collected to work with all relevant stakeholders to ensure that community sport can survive and thrive into the future. Local sport will play a vital role in sustaining health, resilience and community spirit as we weather the COVID-19 storm, so it is essential these clubs are given the support they need.

COMMUNITY SPORT IN AUSTRALIA

According to the Clearinghouse for Sport (Australian sport's knowledge sharing platform), there are at least [70,000 community sports clubs](#) around Australia, and the Sport Australia [AusPlay results](#) for 2019 indicate that 15-16 million Australians (adults and children) play sport each year. Over 3 million adults also participate in sports in non-playing roles, such as volunteer coaching, administration, and support roles.

Community sport directly or indirectly touches the lives of almost all Australians.



SURVEY RESPONSES

During the five weeks in which the survey was open (19th May - 22nd June 2020), we collected **4,337 responses from 4,127 unique sporting organisations.**

The data collected covers **99 different sport types**, ranging from mainstream sports like football, netball and cricket, to sports with only one or two respondents, like carriage driving and pickleball.

By Sport

Table 1 - Data collected from 99 different sport types (top 25 shown)

Sport Name	# Clubs	Sport Name	# Clubs
football (soccer)	444	gymnastics	63
australian football	370	cycling	63
cricket	341	rowing	59
rugby league	282	athletics	53
equestrian	245	baseball	52
lawn bowls	209	volleyball	44
netball	189	touch football	43
swimming	166	croquet	39
golf	134	softball	39
multi-sport	127	sailing	35
tennis	125		
rugby union	117		
hockey	104		
martial arts	94		
basketball	93		

The full list of sports represented in the survey responses is available in Table 3 in the appendix.

By Location

We heard from **clubs in all states and territories**, and from both metro and regional Australia (darker areas represent a higher number of clubs responding from that area).

For a full breakdown by state and territory see Table 17 in the Appendix.

4127 UNIQUE ORGANISATIONS RESPONDED

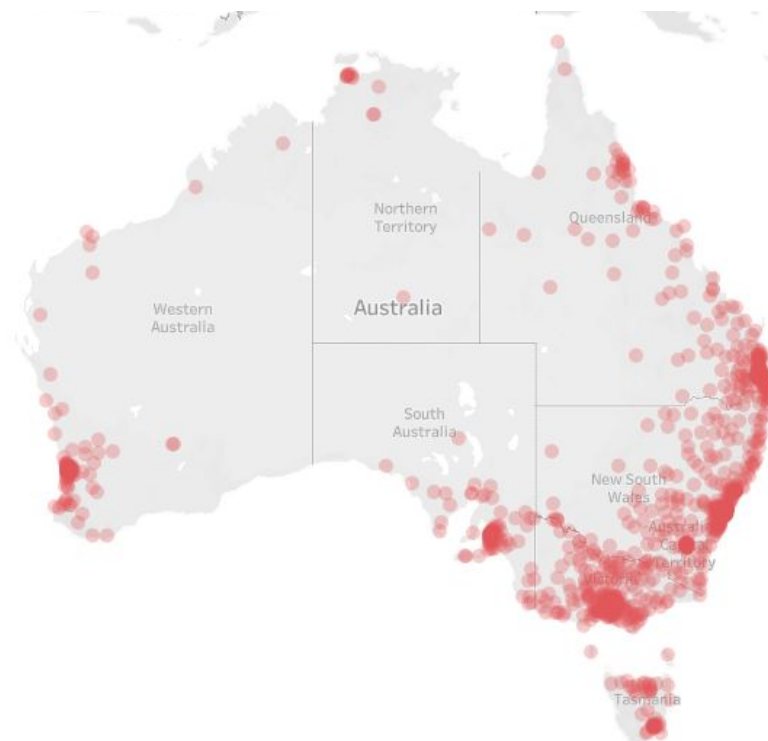


Figure 1 - Map showing respondents by location



By Club Type

Whilst we received responses from all levels of sport, including national and state sporting organisations, our primary focus was to assess the impact on community sports clubs. **Over 91% of all responses were from community sports clubs**, and so this report focuses on this segment only. Community sports clubs range in scale and size, so we have segmented their responses into two categories: Small Local Clubs and Large Local Clubs.

Small Local Clubs are defined as local/regional sports clubs or associations with fewer than 1,000 members and with less than \$250k in annual revenue; Large Local Clubs are those that exceed 1,000 members and \$250k in revenue.

2,523 clubs from our sample (**61%**) were classified as **Small Local Clubs** under that definition. **1,233 (30%)** were classified as **Large Local Clubs**. The remaining 371 (9%) of respondents were from other kinds of sporting organisations (such as professional sports clubs, national sporting organisations, and schools).

With thousands of responses from all over Australia, covering 99 different sport types, the survey responses represent a sound basis to draw conclusions for community sport as a whole. We therefore extrapolated the results from survey respondents across the national population of 70,000 community clubs to assess the overall impact of COVID-19, using the methodology outlined at Appendix A

	% Local/Regional Clubs in Sample	Estimated Total Clubs in Australia
Small Local Clubs	67%	47,147
Large Local Clubs	33%	22,853
Total Local Clubs	100%	70,000

Table 2 - Estimated total clubs in Australia

IMPACT OF COVID-19 ON COMMUNITY SPORT





1. COVID-19 HAS COST COMMUNITY SPORTS CLUBS AN ESTIMATED \$1.6BN TO DATE

From March 2020 until our survey close on 22 June, the shutdown of local sport and the **impact of COVID-19 on local economies cost community sports clubs an estimated \$1.6bn**, broken down as follows:



**Refer to Appendix Table 8*

Based on our survey responses, the average amount lost is \$14,900 for Small Local Clubs, and \$37,434 for Large Local Clubs.*

However, this average negative financial impact is inflated by outlying clubs and sports with more particular assets, or higher self-reported losses. If we remove these outliers, we can get a more accurate picture of the loss borne by the majority of “typical” Small Local, and Large Local Clubs:

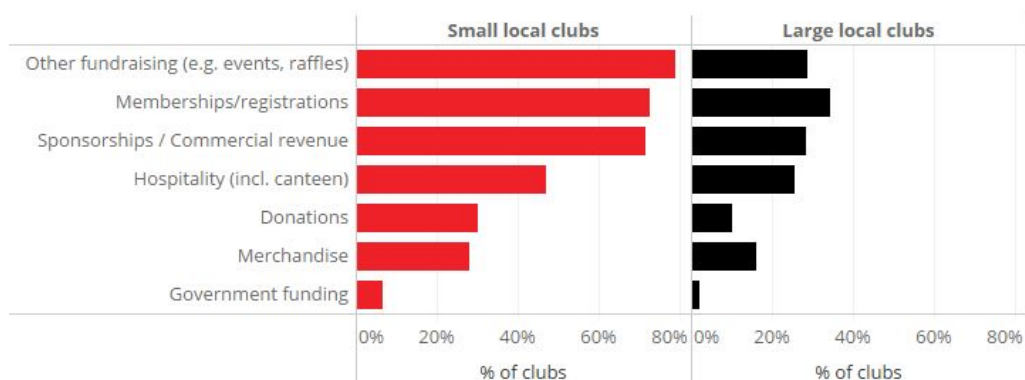
- For Small Local Clubs who have lost under \$25k (approx. 77% of Small Local Clubs), the **average amount lost is \$10,394****
- For Large Local Clubs who have lost under \$50k (62% of Large Local Clubs) the **average amount lost is \$13,367****

** Refer to Financial Bracket Calculation Method in Appendix B for details of assumptions and methodologies used in our calculations.*

*** Refer to Appendix Table 9 & Table 10*

Figure 2 - Declined Revenue Streams

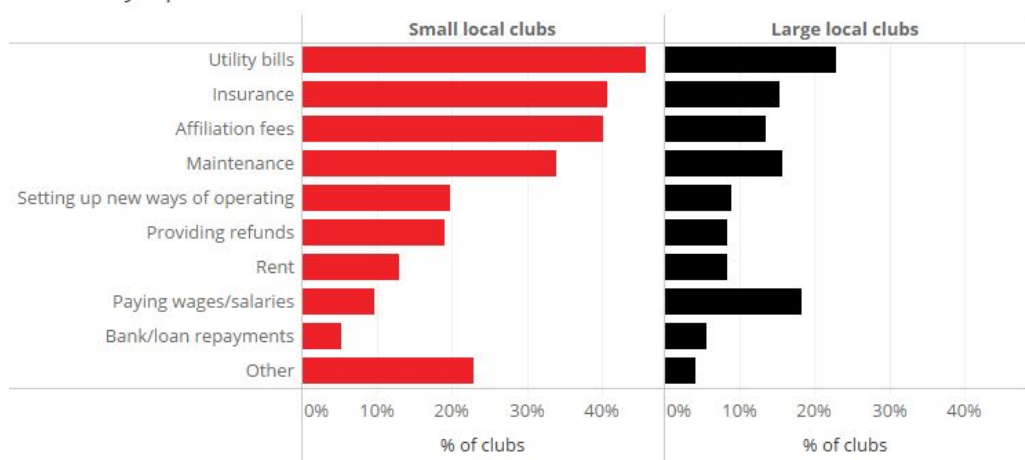
Declined revenue streams



Clubs overwhelmingly reported that their main sources of revenue (principally memberships, sponsorships, fundraising and events/hospitality) ceased or declined.

Figure 3 - Continuing Expenses

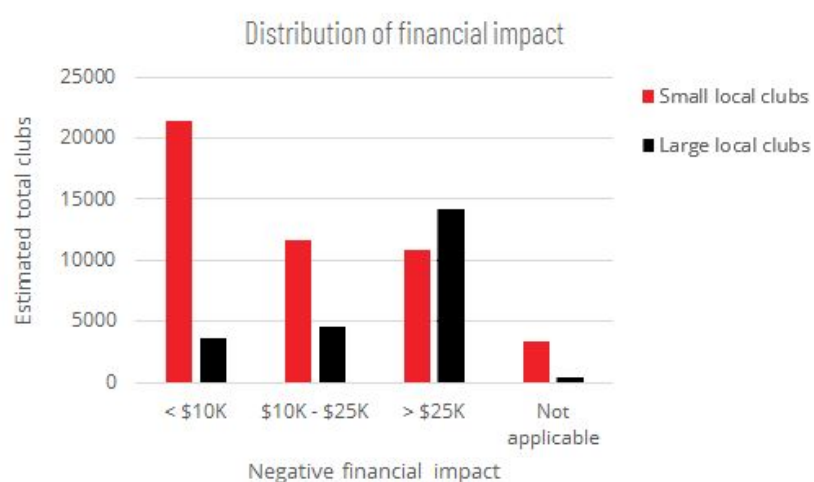
Continuing expenses



Despite being largely volunteer-run, outgoing costs continued even though sporting activities were on hold, with **91% of Small Local Clubs** (an estimated 42,600 clubs around Australia) **recording ongoing expenses** such as utility bills, affiliation fees, maintenance and rent.

These ongoing expenses, coupled with the loss in revenue, caused **93% of all clubs to lose money** during the period.

Figure 4 - Distribution of financial impact



Respondents reported that these losses were funded by clubs drawing down on savings or going into debt. Concerningly, responses to the survey also showed that **many community clubs have little in the way of capital or cash reserves** meaning that for a large proportion of both Small Local and Large Local Clubs ongoing losses cannot be sustained for a prolonged period.

This means that the **survival of thousands of clubs is under threat** if financial support is not provided (*see point 3 - The crisis is just beginning for community sport*).





2. THE SHUTDOWN OF COMMUNITY SPORT HAS HAD A PROFOUNDLY NEGATIVE SOCIAL IMPACT

Community sport is one of the most efficient ways of delivering wellbeing outcomes for the population. It provides physical activity, social connection, meaning and purpose—key protective factors for physical and mental health.

Clubs responding to the survey consistently reported concerns about the impact that a lack of community sport has had on physical and mental health, and on their communities as a whole.



Mental health of club members has suffered - a couple significantly - due to inability to row and lack of support group.



- Sandy Bay Rowing Club, Sandy Bay, TAS



As we have a lot of 70 plus members it's important to keep fitness levels up. Without regular exercise, many are finding they are feeling stiff and old and may not be able to get back to any sport.



- Bombora Outriggers, Bongaree, QLD



Not being able to play has many impacts: player's mental health, loss of revenue including external fundraising, less exposure for sponsors, lost coaches and volunteers due to changes to their work requirements, already forecasted higher affiliate fees due to loss of revenue from parent body.

- South Darwin Rugby Union Club, Marrara, NT



These impacts have been measured and assessed as part of a contemporaneous and complementary study (*Sport and Wellbeing* conducted by Victoria, Federation and Flinders Universities and led by Professors Rochelle Eime, Hans Westerbeek and Murray Drummond). This surveyed over 4000 sport-playing Australians to investigate the contribution of sport to the health and wellbeing of individuals and communities before, during, and after COVID-19.

When study participants rated their health during COVID-19 lockdown restrictions compared to a year earlier, **one quarter reported their general health was worse** than the year before, **29% reported worse physical health** (and 32% of 13-17 year olds), and **31% reported worse mental health**. The research clearly demonstrates the negative impact that the absence of community sport has had on physical and mental health – even over the relatively short period of 3-4 months experienced to date.

The results of our survey, when considered in light of the *Sport and Wellbeing* study outcomes, raises serious concerns about the social consequences and community dislocation we face as a nation if community clubs cannot survive the present crisis and ensure their sustainability as life post COVID-19 continues to evolve.



[Impacts on] mental health of participants and extended family and friends that are no longer active or social because they are not supporting or separating and socially interacting with each other because there is no training or competition to watch. Social connections and support has been lost.

- Belconnen Volleyball Club, Canberra, ACT

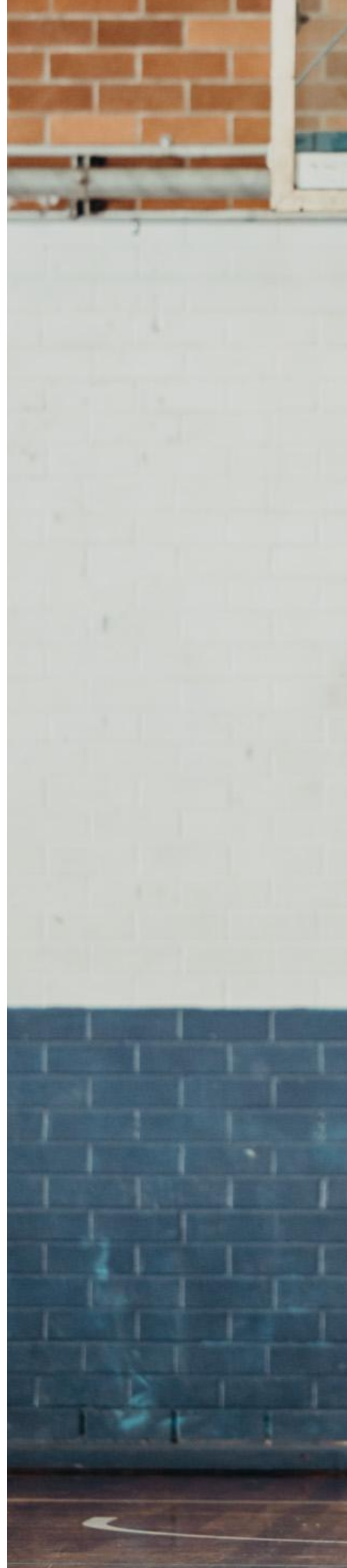
3. THE CRISIS IS JUST BEGINNING FOR COMMUNITY SPORT

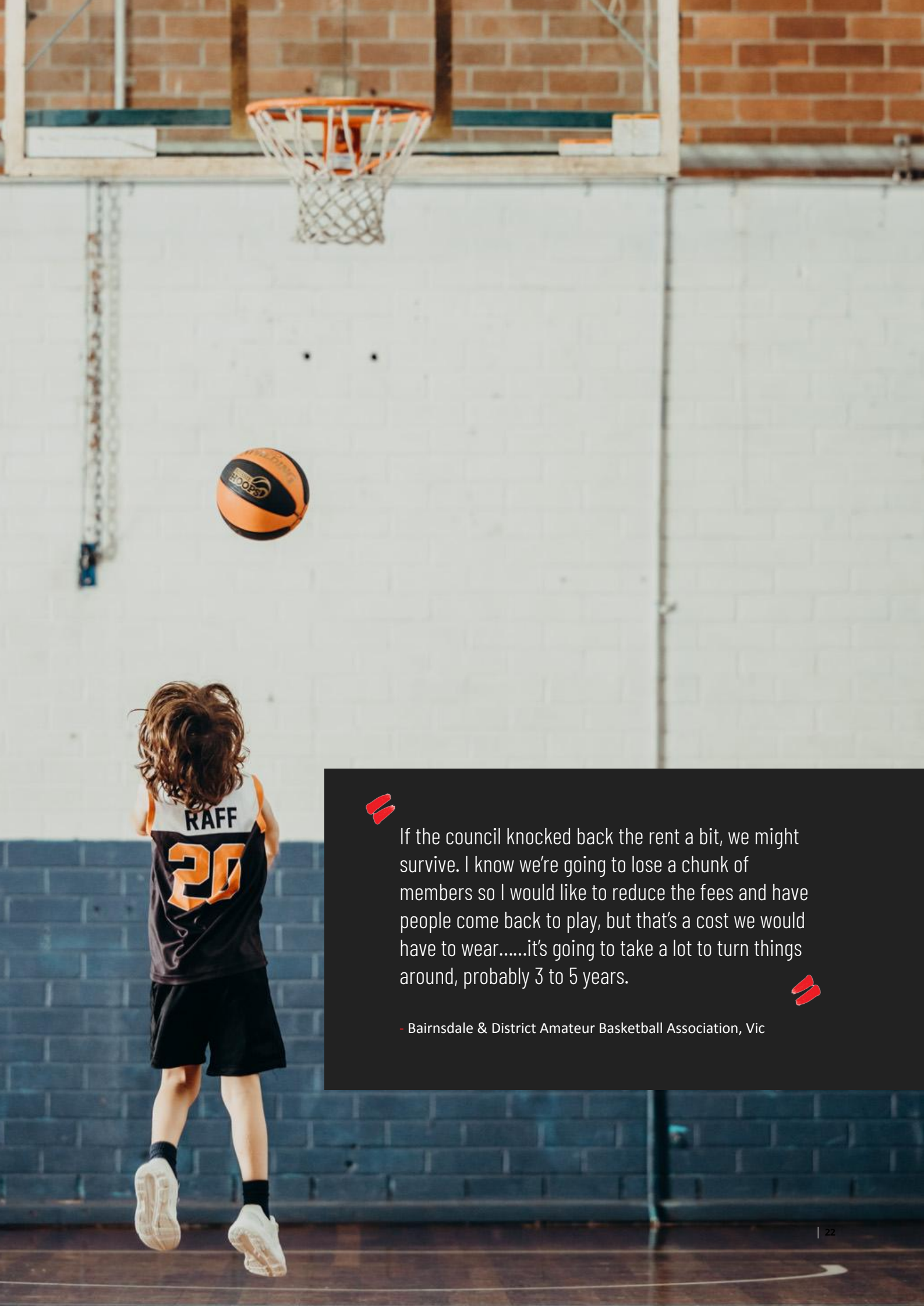
While restrictions on sporting activity are lifting in most states and territories and many community sports are taking tentative steps to restart, the rapid surge in COVID-19 cases in Victoria in early July caused a swift return to sporting (and economic) shutdown. This will inevitably mean the cancellation of most winter-sporting competitions in metropolitan Melbourne - a huge blow to affected communities, and one that our survey shows will threaten the survival of many Melbourne sports clubs.

But even if the return to community sporting activity continues elsewhere without further widespread disruption, our survey responses show that this is far from the end of the crisis. With people out of work, habits broken and health concerns discouraging participants and volunteers from returning, **community sport could take years to fully recover.**

And of course, economic circumstances mean that clubs' income will remain depressed for the foreseeable future – with local sponsors doing it tough and unable to afford their traditional support, and members who have lost their jobs or business being unable to afford sport for themselves or their kids.

Clubs' survey responses highlighted two primary areas of concern in the months ahead: finance/funding, and member/volunteer engagement.





If the council knocked back the rent a bit, we might survive. I know we're going to lose a chunk of members so I would like to reduce the fees and have people come back to play, but that's a cost we would have to wear.....it's going to take a lot to turn things around, probably 3 to 5 years.

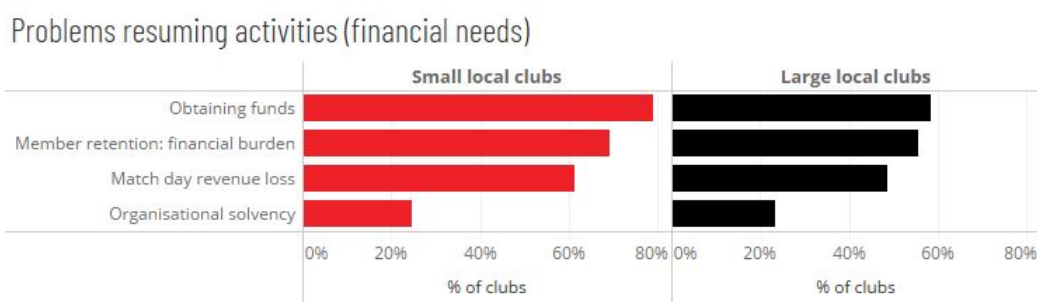


- Bairnsdale & District Amateur Basketball Association, Vic

Financial challenges

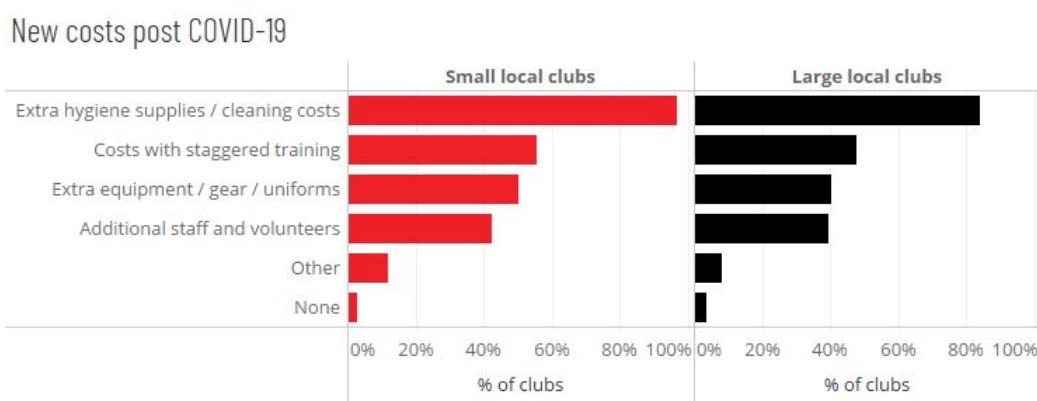
The biggest problem for both Small Local Clubs and Large Local Clubs is obtaining the necessary funding to replace lost income (principally from reduced sponsorship, matchday revenues, fundraising and memberships) and to assist members who can no longer afford for themselves or their kids to participate in sport. For around 80% of Small Local Clubs, for example, **obtaining funds is their number 1 priority**.

Figure 5 - Problems resuming activities (financial needs)



To compound these revenue shortfalls, **community clubs face increased costs in returning to sporting activity in a COVID-19 environment**. Over 97%, (or an estimated 46,000) Small Local Clubs and 84%, (or an estimated 19,000) Large Local Clubs face increased cleaning and hygiene costs, for example, while around 50% of Small Local and 40% of Large Local Clubs will face additional costs for extra gear, uniforms or equipment.

Figure 6 - New costs post COVID-19

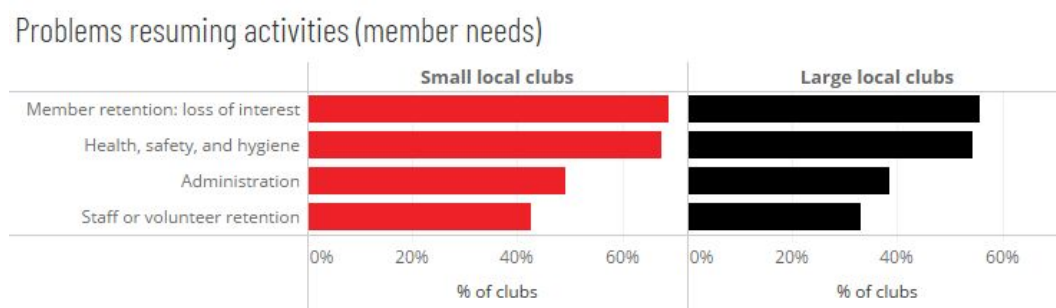




Decline in participation of Members/volunteers

Nearly 70% of Small Local Clubs and 56% of Large Local Clubs are **forecasting a reduction in the number of members** due to loss of interest caused by the period of inactivity (with whole seasons having been cancelled in many cases) and/or concerns around health and hygiene.

Figure 7 - Problems resuming activities (member needs)



I would not be surprised with a 20-25% drop even from registered players pre-shutdown with loss of motivation/routine.

- Canberra Region Rugby League, Canberra, ACT

With clubs closed, existing members will find it hard to encourage students to return with a loss of motivation, members will find it difficult to recruit new students due to class restrictions on numbers and spectators. Volunteers will lose motivation and may not return, equipment may fail due to lack of use to mention a few things.

- Australian Taekwondo Victoria, VIC

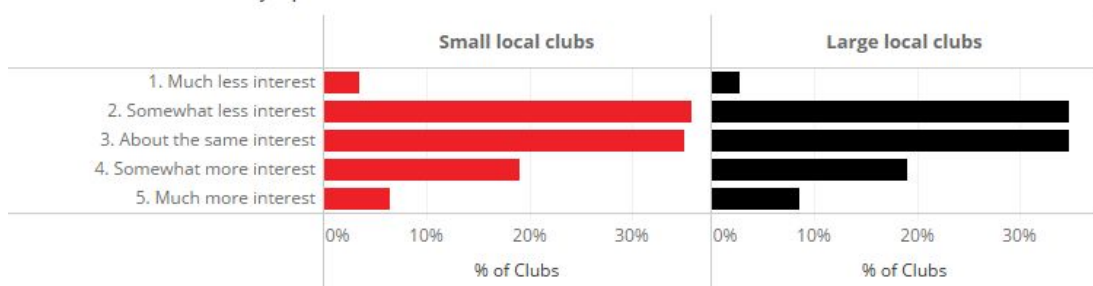


A similar number of clubs also forecast a decline in membership for financial reasons, with many members no longer able to afford for themselves or their kids to participate in sport due to loss of employment or other financial reasons.

However, the survey data also showed an almost equal split in whether clubs forecast a change in **demand** for community sport. As the table below shows, when asked whether clubs expected interest in community sport to increase, decrease, or be much the same, answers were split roughly a third for each.

Figure 8 - Continuing Expenses

Interest in community sport



For those that are expecting interest/demand to stay the same or increase, this creates another challenge, as they will be faced with meeting this demand at a time when their financial resources are strained to the limits and/or the community's ability to afford to participate is compromised.



And it is not just the active participants themselves who have been affected; Australia's army of 3 million **sporting volunteers** – on whose shoulders community sport rests so heavily – are also **expected to decline**, with over 43% of Small Local Clubs and more than 30% of Large Local Clubs citing this as a concern.

Many club volunteers are members of vulnerable populations and it will be unrealistic to expect them to re-engage with the club until it is completely safe to do so.

- Adamstown Rosebud Football Club, Newcastle, NSW

A significant number of volunteers have found COVID - 19 a difficult period to negotiate and have lost enthusiasm for volunteering.

- Albury Thunder Rugby League Football Club, Albury, NSW

The projected decline in volunteers is particularly concerning when set against the fact that 42% of Small Local Clubs and 34% of Large Local Clubs say they will require additional support from volunteers – to cope with issues such as additional hygiene measures and reporting, and practicalities such as staggered training. This creates a real pinch point that will in itself affect the sustainability of community clubs.

“ I need a lot of volunteers to help with all the new regulations we need to implement but I don't want to lean on the committee when a lot of them have their own issues We will have to get people to come in one entrance and leave out another, sanitise everything before, during and after the games, and log everyone who has been through the centre, so there's a whole lot of logistics that put us behind the eight ball because of a lack of volunteers. ”

- Bairnsdale & District Amateur Basketball Association, Vic





We are now faced with the impact of key committee and volunteer personnel that have realigned their priorities during the break and disengaged from the club. A large number of members particularly in our women's teams have indicated that they can no longer afford to participate, [due] to the external pressures COVID-19 has placed in their personal lives.



- Ashfield Sports Club, Perth, WA

4. OVERALL, ONE IN FOUR COMMUNITY CLUBS RISK CLOSURE

As outlined at section 1, financial losses for each club to date are relatively small, with **typical average losses in the region of \$10-\$13k* for most Small Local and Large Local Clubs** respectively. However, when combined with the ongoing decline in revenue and increase in costs now facing community sport, our survey responses show that the sustainability of thousands of Australian community clubs is at risk.

**Refer to Appendix Table 9 and 10*

This is because many community sports clubs have little in the way of cash reserves to survive any prolonged financial hit. At the time the survey was open, with community sport largely shut down, 17%/26% of respondents (Small Local, and Large Local Clubs respectively) only had funds to cover costs for a further 3 months, and a further 29%/31% only had funds to survive 6 months. That means that roughly half of all community sports clubs (around 34,000 clubs in total) are in a vulnerable financial position (approximately 21,000 Small Local Clubs and 13,000 Large Local Clubs).

Figure 8 - Ability to cover costs



While the shutdown of community sport has, at the time of writing, been eased in most States and Territories, the 6-week lockdown of Melbourne that took effect from 8 July 2020 has again stopped community sport in the city in its tracks. Our survey indicates that this alone threatens the survival of hundreds – maybe thousands – of Melbourne clubs that may not have the funds to survive even this relatively short period. The reintroduction of sporting shutdowns in other states and cities following any future flare-ups would be likely to trigger widespread closure of community clubs.







Even without a return to widespread shutdowns, approximately one in four respondents (24% of Small Local Clubs and 23% of Large Local Clubs) cited Organisational Solvency as one of their major challenges going forward. Applying these responses to the population of community clubs as a whole, this indicates that over **16,000 community sports clubs nationally are concerned about their solvency** due to the twin pressures of reduced revenues and increased operating costs.

As the *Sport and Wellbeing* study clearly shows, the loss of thousands of community clubs would have a devastating impact on physical and mental health for millions of participants and volunteers. It would affect communities all over Australia in both metro and regional locations, and would lead to widespread social dislocation.

We cannot allow this to happen.


 Social [impacts] for the town as this is the only major sport in town.
 

- Baradine Magpies Seniors Rugby League Football Club, Baradine, NSW



APPROXIMATELY

1 in 4

cited Organisational Solvency as one of their major challenges going forward (24% of Small Local Clubs and 23% of Large Local Clubs)



We are a tiny community and this is the only thing we have. Coronavirus may be the end of our club.



- Baan Baa Tennis Club, Narrabri, NSW



5. COMMUNITY SPORTS CLUBS NEED A \$1.2BN FUNDING INJECTION

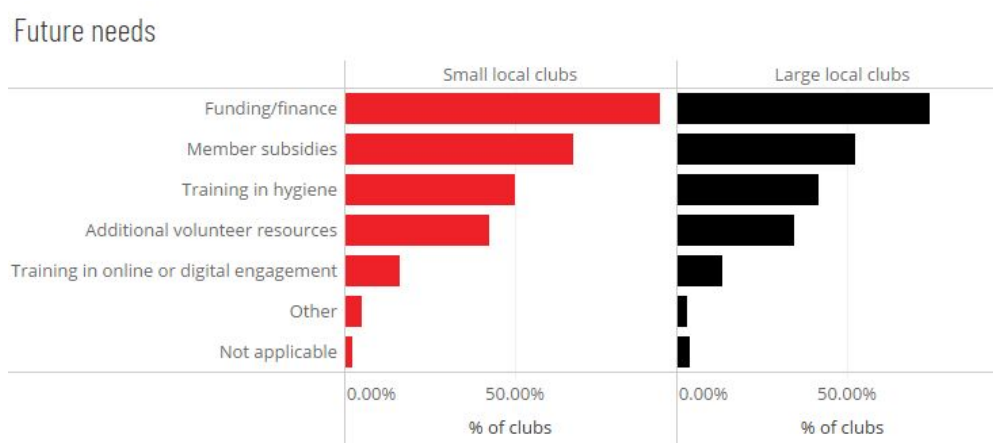
Clubs were asked to estimate the future funding required to help them navigate the return to sporting activity.

In aggregate, **Australian community sports clubs need in the region of \$1.2 billion* to resume activities after COVID-19** and meet the twin challenges of increased costs and reduced revenues. This is broken down between Small Local sports clubs reportedly requiring \$594 million (at an average of \$12,610 per club) and Large Local Clubs requiring \$613 million (average \$26,835).



**Refer to Appendix Table 11*

**Refer to Financial Bracket Calculation Method in Appendix B for details of assumptions and methodologies used in our calculations.*



Figure 9 - Future Needs



With the pressure on local economies and negative impact COVID-19 has had – and will continue to have – on potential sponsors, it is unlikely that community sport has the capacity to raise the necessary funds itself. Indeed, aside from the impact on local sponsors and membership revenues, clubs are reporting that many traditional forms of fundraising are themselves severely compromised:

 We simply don't have enough volunteers to run online fundraising plus in the country everyone is doing it tougher than normal financially. 

- Cootamundra Rugby League Football Club seniors, NSW

 On the back of bushfires, fundraising is not an option in the local community - businesses are not able to support. 

- Highlands District Cricket Association, NSW

In the immediate term, the one in four clubs who have reported concerns about their organisational solvency are most at risk within the next 3-6 months.

Based on survey responses, providing support to those clubs who reported they would be out of funds within 3 months would involve a financial injection of around \$300m*.

To assist those clubs who reported cash reserves would be exhausted within 6 months, an additional \$400m** of funding would be required.

**Refer to Appendix Table 15 and 16*

***Refer to Appendix Table 17*



6. CONCLUSION

COVID-19 has had a damaging impact on community sports clubs and threatens the survival of over 16,000 clubs nationwide. The loss of clubs on this scale would have a devastating impact on physical and mental health, and on social cohesion.

While we cannot solve a problem of this scale alone, we passionately believe in the value of community sport, and we will lead the charge to fight for its survival. We call on all who care about community sport, and all who can contribute to its survival to join with us.

To find out more and explore opportunities to help, please [contact us](#).

For media enquiries, please contact Jodie Artis at Progressive PR (jodie@progressivepr.com.au).

The Australian Sports Foundation

20 July 2020

APPENDIX



A. RESPONSE DATA

Method for extrapolating club numbers

There are at least [70,000 community sports clubs around Australia](#). Using the % of responses between Small Local Clubs and Large Local Clubs, we have extrapolated these figures to arrive at estimated aggregate totals for each of these types of club.

When using the Clearinghouse figure of 70,000 total community sports clubs in Australia to determine the total number of clubs impacted, the following assumptions were made:

- Only local / regional sports clubs and community organisations are included in this figure (i.e. the Clearinghouse figure does not include other kinds of organisations such as school clubs, professional clubs, state bodies, and the other types we've categorised as 'Other' in this report).
- The clubs that responded to the survey are proportionately representative of sports organisations in Australia.

Table 3 - Number of clubs in sample

Club Type		Number of Clubs in Sample
Local/Regional Sports Clubs	Small Local/regional sports clubs	2,321
	Small community groups	202
	Large local/regional sports clubs	1,125
	Large community groups	108
Other Sports Organisations	State sporting organisations	117
	Professional sports clubs	53
	National sporting organisations	45
	School/University clubs	25
	Government organisations/councils	8
	Not provided	123
TOTAL		4,127

Table 4 - Estimated total clubs in Australia

% Local/Regional Clubs in Sample		Estimated Total Clubs in Australia
Small Local Clubs	67%	47,147
Large Local Clubs	33%	22,853
Total Local Clubs	100%	70,000

Survey response numbers by sport

Table 5 - Survey response numbers by sport

Sport Name	# Clubs
football (soccer)	444
australian football	370
cricket	341
rugby league	282
equestrian	245
lawn bowls	209
netball	189
swimming	166
golf	134
multi-sport	127
tennis	125
rugby union	117
hockey	104
martial arts	94
basketball	93
gymnastics	63
cycling	63
rowing	59
athletics	53
baseball	52
volleyball	44

Sport Name	# Clubs
touch football	43
croquet	39
softball	39
sailing	35
shooting	34
dragon boating	33
paddlesports	32
motor sports	31
dancesport	20
roller sports	20
motorcycling	19
squash	19
surf life saving	19
water polo	18
calisthenics	18
campdraft	17
disability sports	16
cheerleading	14
darts	14
polocrosse	14

Sport Name	# Clubs
drill dance (marching)	14
archery	13
ice hockey	13
futsal	12
badminton	11
rodeo	11
boxing	9
surfing	9
table tennis	9
ice skating	8
Aviation Sport	8
fencing	7
floorball	7
sport climbing	7
lacrosse	6
orienteering	6
synchronised swimming	6
triathlon	6
weightlifting	6
outdoor recreation	6
bocce	5

Survey response numbers by sport

Table 5 - Survey response numbers by sport continued.

Sport Name	# Clubs	Sport Name	# Clubs
diving	5	tenpin bowling	2
horse racing	5	biathlon	1
oztag	5	billiards & snooker	1
Dog Sports	5	curling	1
fishing	4	dinghy boat racing	1
flying disc	4	jet skiing	1
gridiron	4	pigeon racing	1
other	4	powerboat racing (circuit)	1
Fitness Activities	3	rc car racing	1
ice racing	3	real tennis	1
pickleball	3	table football	1
snowsports	3	trugo	1
water skiing	3		
blind sports	2		
dodgeball	2		
handball	2		
petanque	2		
underwater sports	2		
Lumberjack Sports	2		
circus	2		
lifesaving	2		

B. FINANCIAL DATA

Free text calculation method

The estimated total financial impact to date and future funding needed share the same basic method of calculation. Most respondents selected a financial range when assessing financial costs and funding needs. However, a percentage (around 6%) also added specific free text amounts. These amounts were used to give an estimate of what respondents meant on average when selecting a particular financial band.

Table 6 - 'What has been the estimated negative financial impact on your organisation since 1 March, 2020?'

Range	Small Local Club Average Free Text Entry	Large Local Club Average Free Text Entry
\$0	-	\$0
<\$10K	\$8,833	\$8,853
\$10K-\$24,999	\$13,121	\$13,539
\$25K-\$49,999	\$22,161	\$19,721
\$50K-\$99,999	\$43,522	\$42,253
\$100K-\$249,999	-	\$132,631

Table 7 - 'How much funding does your organisation require to assist in resuming operation / activities?'

Range	Small Local Club Average Free Text Entry	Large Local Club Average Free Text Entry
\$0	\$0	\$0
<\$10K	\$10,296	\$13,060
\$10K-\$24,999	\$13,362	\$24,016
\$25K-\$49,999	\$21,867	\$32,746
\$50K-\$99,999	\$31,466	\$62,948
\$100K-\$249,999	-	\$113,332

We received some results in upper bands, which were removed from the data on the basis that they were not felt to be realistic (consistent with classification of club finances) and/or were distortive of the overall results.

Financial brackets

Calculation method

The below data is achieved by segmenting responses within the self-selected financial brackets (Negative Financial Impact, and Future Funding Needed), privileging free text response.

While each club and category had different answers and needs, by averaging their responses an approximate figure can be found (most clubs will fall under this number).

Median is included in the datasets for the centre of the distributions.

The average response within each financial bracket was then extrapolated based on overall Australian community sport club numbers as found in Appendix table 4.

Totals for a given category are calculated by extrapolating the overall average financial figure and multiplying by the extrapolated number of clubs (ie. if x clubs were y% of the sample, then multiply the average by the same y% of the total population to yield an overall figure).

As there are inherent differences between club types, Grand Totals are calculated as the sum of Small Local Club extrapolated totals and Large Local Club extrapolated totals.

Due to the methods of data collection and extrapolation, some cleaning of the data was required. This includes removing null or inaccurate/outlier data such as:

- "Null Responses" - i.e. Surveys that did not select a finance bracket were not counted
- Small Local Clubs with negative impacts, or funding required >\$100,000 were not counted
- Large Local Clubs with negative impacts, or funding required >\$250,000 were not counted

As those errors were not a statistically significant proportion of the original data set (<3%), yet were distorting the results, it was determined that it was safe to remove them to preserve the utility of the data.

Negative financial impact

Table 8 - Negative financial impact brackets

Club Type	Est. Neg. Financial Impact (Range)	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Negative Financial Impact	Extrapolated Negative Financial Impact	Median Negative Financial Impact
Small Local Clubs	1 - 9,999	1,088	49%	23,138	\$8,833	\$204,373,538	\$9,998
	10,000 - 24,999	611	28%	12,994	\$13,121	\$170,489,026	\$14,999
	25,000 - 49,999	343	15%	7,294	\$22,161	\$161,648,982	\$24,999
	50,000 - 99,999	175	8%	3,722	\$43,522	\$161,971,475	\$49,999
	Total	2,217	100%	47,147	\$14,900	\$702,490,300	\$3,999
Large Local Clubs	0 - 0	36	7%	1,626	\$0	\$0	\$0
	1 - 9,999	128	25%	5,781	\$8,853	\$51,179,193	\$9,998
	10,000 - 24,999	106	21%	4,787	\$13,539	\$64,816,609	\$14,999
	25,000 - 49,999	82	16%	3,703	\$19,721	\$73,036,724	\$24,999
	50,000 - 99,999	66	13%	2,981	\$42,253	\$125,947,742	\$49,999
	100,000 - 249,999	88	17%	3,974	\$132,631	\$527,128,646	\$149,999
	Total	506	100%	22,853	\$37,434	\$855,479,202	\$14,999
Grand Total		2,785	100%	70,000	\$21,262	\$1,557,969,502	\$14,999

Negative financial impact of “typical” clubs

Table 9 - Negative financial impact of “typical” clubs: Small Local <\$25k

Club Type Small Local Clubs						
Est. Neg. Financial Impact (<\$25k)	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Negative Financial Impact	Extrapolated Negative Financial Impact	Median Negative Financial Impact (copy)
Under \$25k	1,699	77%	36,131	\$10,394	\$375,546,653	\$9,998
Other	518	23%	11,016	\$29,484	\$324,792,796	\$24,999
Grand Total	2,217	100%	47,147	\$14,900	\$700,339,449	\$3,999

Table 10 - Negative financial impact of “typical” clubs: Large Local <\$50k

Club Type Large Local Clubs						
Est. Neg. Financial Impact (<\$50k)	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Negative Financial Impact	Extrapolated Negative Financial Impact	Median Negative Financial Impact (copy)
0	36	7%	1,626	\$0	\$0	\$0
Under \$50k	316	62%	14,272	\$13,367	\$190,771,605	\$14,999
Other	154	30%	6,955	\$93,975	\$653,620,640	\$149,999
Grand Total	506	100%	22,853	\$37,434	\$844,392,245	\$14,999

Future funding needed

Table 11 - Future funding needed brackets

Club Type	Funding for Resuming Difficulties (Range)	Sampled Clubs	% Answers	Extrapolated Clubs	Average Future Funding Needed	Extrapolated Funding Needed After Difficulties	Median Funding Needed to Resume After Difficulties
Small Local Clubs	0 - 0	2	0%	40	\$0	\$0	\$0
	1 - 9,999	1,551	65%	30,751	\$10,296	\$316,608,178	\$9,998
	10,000 - 24,999	565	24%	11,202	\$13,362	\$149,679,788	\$14,999
	25,000 - 49,999	184	8%	3,648	\$21,867	\$79,770,816	\$14,999
	50,000 - 99,999	76	3%	1,507	\$31,466	\$47,412,969	\$24,999
	Total	2,396	100%	47,147	\$12,610	\$594,523,670	\$14,999
Large Local Clubs	0 - 0	36	7%	1,546	\$0	\$0	\$0
	0 - 9,999	237	45%	10,181	\$13,060	\$132,961,248	\$9,998
	10,000 - 24,999	118	22%	5,069	\$24,016	\$121,734,702	\$14,999
	25,000 - 49,999	72	14%	3,093	\$32,746	\$101,280,103	\$24,999
	50,000 - 99,999	39	7%	1,675	\$62,948	\$105,456,784	\$49,999
	100,000 - 249,999	30	6%	1,289	\$113,332	\$146,050,948	\$149,999
	Total	532	100%	22,853	\$26,835	\$613,260,255	\$14,999
Grand Total		2,928	100%	70,000	\$15,430	\$1,207,783,925	\$9,998

Future funding needed by “typical” clubs

Table 12 - Future funding needed by “typical” clubs: Small Local <\$25k

Club Type Small Local Clubs						
Funding Needed to Resume (<\$25k)	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Future Funding Needed	Extrapolated Funding Needed After Difficulties	Median Funding Needed to Resume After Difficulties
Under \$25k	2,116	89%	41,953	\$11,130	\$466,931,325	\$9,998
Other	262	11%	5,195	\$24,478	\$127,149,413	\$14,999
Grand Total	2,378	100%	47,147	\$12,610	\$594,080,738	\$9,998

Table 13 - Future funding needed by “typical” clubs: Large Local <\$50k

Club Type Large Local Clubs						
Funding Needed to Resume (<\$50k)	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Future Funding Needed	Extrapolated Funding Needed After Difficulties	Median Funding Needed to Resume After Difficulties
0	36	7%	1,546	\$0	\$0	\$0
Under \$50k	427	80%	18,343	\$19,517	\$357,990,573	\$5,000
Other	69	13%	2,964	\$84,854	\$251,507,256	\$49,999
Grand Total	532	100%	22,853	\$26,835	\$609,497,829	\$14,999

Aggregate financial data

Table 14 - Overall extrapolated average and aggregate financial impact

	Extrapolated Clubs	Avg. Est. Neg. Financial Impact	Extrapolated Est. Neg. Financial Impact	Average Future Funding Needed	Extrapolated Future Funding Needed
Small Local Clubs	47,147	\$14,900	\$702,490,300	\$12,610	\$594,523,670
Large Local Clubs	22,853	\$37,434	\$855,479,202	\$26,835	\$613,260,255
Total	70,000	\$21,262	\$1,557,969,502	\$15,430	\$1,207,783,925
Other Clubs	-	\$55,018	-	\$33,707	-

*Extrapolated financial totals are achieved by multiplying the average financial data by extrapolated clubs

Future funding needed by the most at-risk clubs

Table 15 - Months until closure: Small Local

Club Type	Small Local Clubs					
Can Continue Covering Costs	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Future Funding Needed	Extrapolated Funding Needed After Difficulties	Median Funding Needed to Resume After Difficulties
< 3 months	407	17%	8,069	\$14,875	\$120,030,838	\$0
3 - 6 months	682	29%	13,522	\$13,223	\$178,796,117	\$9,998
6 - 12 months	650	27%	12,887	\$12,151	\$156,591,152	\$9,998
12 + months	639	27%	12,669	\$10,919	\$138,332,811	\$9,998
Grand Total	2,378	100%	47,147	\$12,610	\$593,750,918	\$9,998

**The grand total is the sum of the Extrapolated Funding Needed After Difficulties column*

Table 16 - Months until closure: Large Local

Club Type	Large Local Clubs					
Can Continue Covering Costs	Sampled Clubs	% of Answers	Extrapolated Clubs	Average Future Funding Needed	Extrapolated Funding Needed After Difficulties	Median Funding Needed to Resume After Difficulties
< 3 months	135	25%	5,799	\$31,514	\$182,755,989	\$14,999
<6 months	296	59%	6,916	\$30,682	\$394,952,700	\$14,999
6 - 12 months	102	19%	4,382	\$30,349	\$132,977,178	\$14,999
12 + months	100	19%	4,296	\$19,569	\$84,062,553	\$9,998
Grand Total	498	100%	22,853	\$26,835	\$611,992,432	\$14,999

**The grand total is the sum of the Extrapolated Funding Needed After Difficulties column*

Table 17 - Funding needed by clubs <6 months before closure

Can Continue Covering Costs	Sampled Clubs	Extrapolated Clubs	Average Future Funding Needed	Extrapolated Funding Needed After Difficulties	Median Funding Needed to Resume After Difficulties
Small Local	1,089	21,687	\$13,842	\$298,826,955	\$9,998
Large Local	296	13,711	\$31,057	\$423,670,076	\$14,999
Grand Total	1,385	35,398	\$15,615	\$722,497,031	\$9,998

**The grand total Extrapolated Funding Needed After Difficulties is the sum of the column*

C. STATE DATA

The following section includes top-level data points (club numbers, self-reported financial needs, self-reported member needs) and separated these by state to show affected clubs by location.

Table 18 - Responses by state split into Small Local and Large Local Clubs

	Small Local Clubs				Large Local Clubs			
	Total survey respondents	Estimated total clubs	Avg. funding needed to resume	Estimated total funding needed to resume	Total survey respondents	Estimated total clubs	Avg. funding needed to resume	Estimated total funding needed to resume
ACT	40	943	\$13,779	\$12,993,597	17	731	\$34,721	\$25,381,051
NSW	746	15087	\$12,314	\$185,781,318	201	8,730	\$28,181	\$246,020,130
NT	16	471	\$11,249	\$5,298,279	3	137	\$61,665	\$8,448,105
Queensland	486	9901	\$15,127	\$149,772,427	94	4,091	\$33,106	\$135,436,646
SA	170	3300	\$12,579	\$41,510,700	30	1,303	\$17,832	\$23,235,096
Tasmania	93	1886	\$10,050	\$18,954,300	15	663	\$13,666	\$9,060,558
Victoria	630	12730	\$11,997	\$152,721,810	126	5,485	\$24,052	\$131,925,220
WA	185	3772	\$12,097	\$45,629,884	40	1,737	\$34,145	\$59,309,865

Figure 10 - Club responses by state

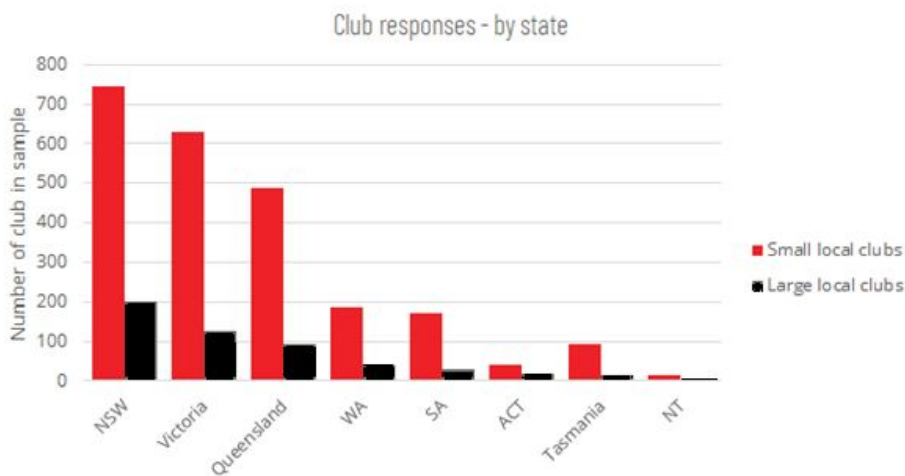
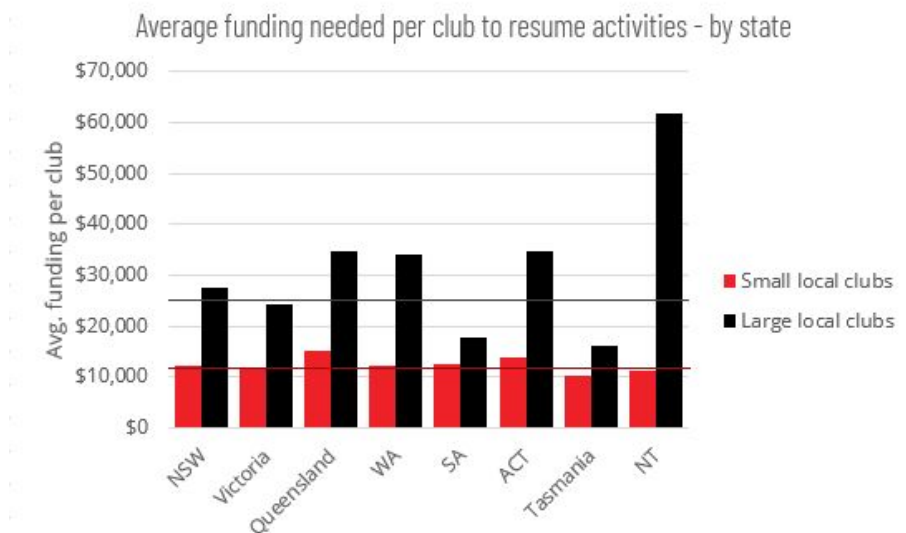


Figure 11 - Average future funding needed per club by state



The national average funding needed per club to resume is \$12,610 for Small Local Clubs and \$26,835 for Large Local Clubs.

For Small Local Clubs, ACT and Queensland indexed higher than the national average funding needed to resume.

For Large Local Clubs, ACT, New South Wales, Northern Territory, Queensland, and Western Australia indexed higher than the national average funding needed to resume.

Northern Territory had fewer Large Local Clubs than other states (3 in the sample, extrapolated to 137 clubs), but these clubs were asking for, on average, higher levels of funding than other states.

Figure 12 - Estimated total funding needed to resume activities: by state

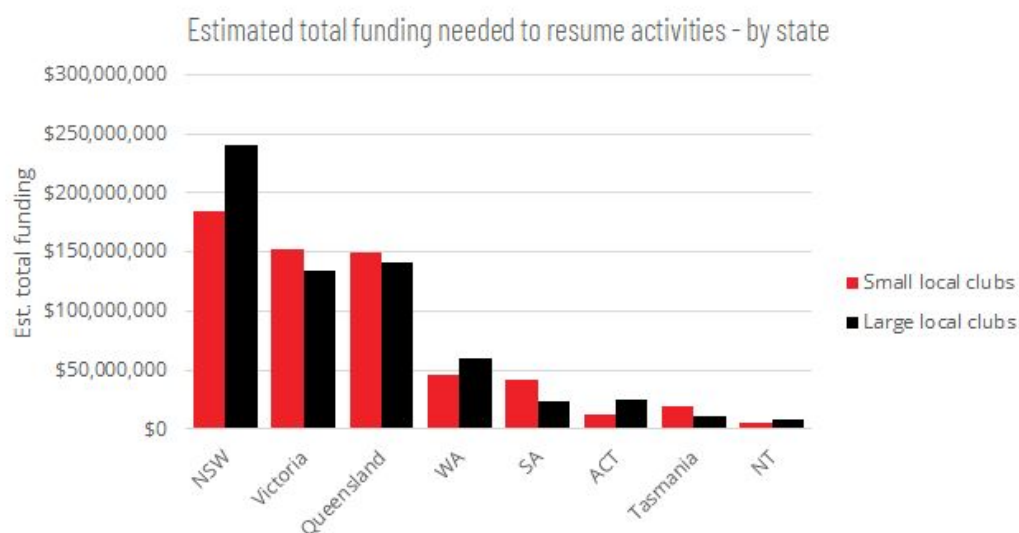
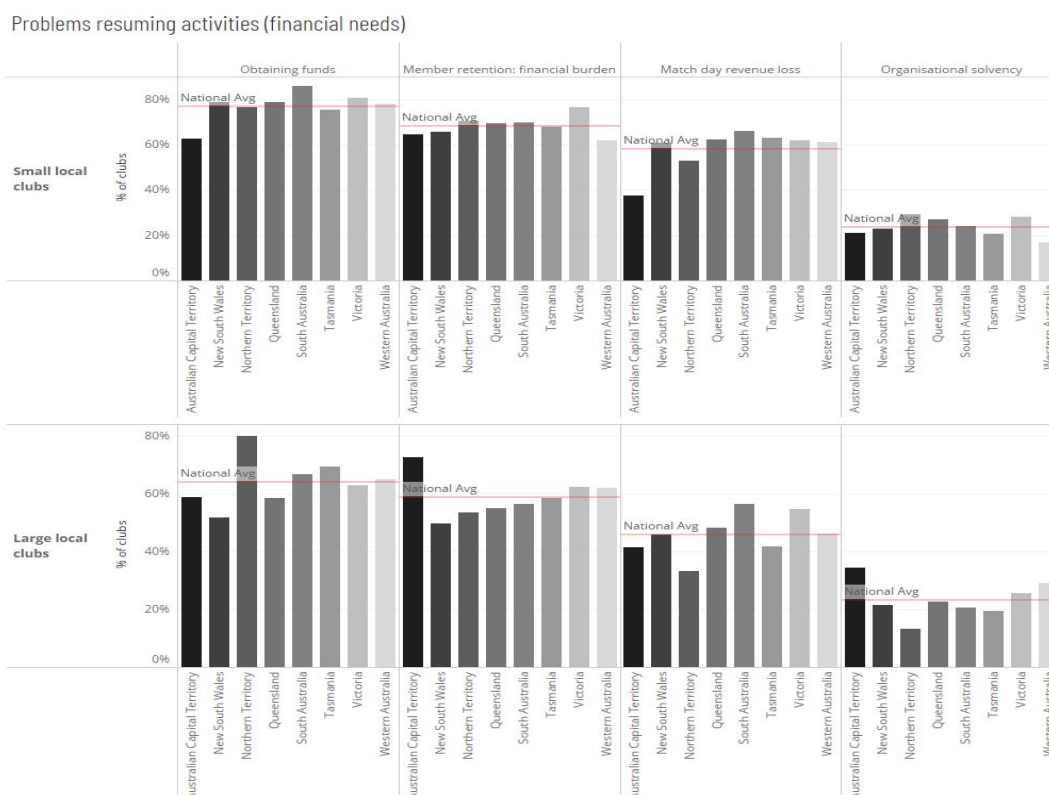


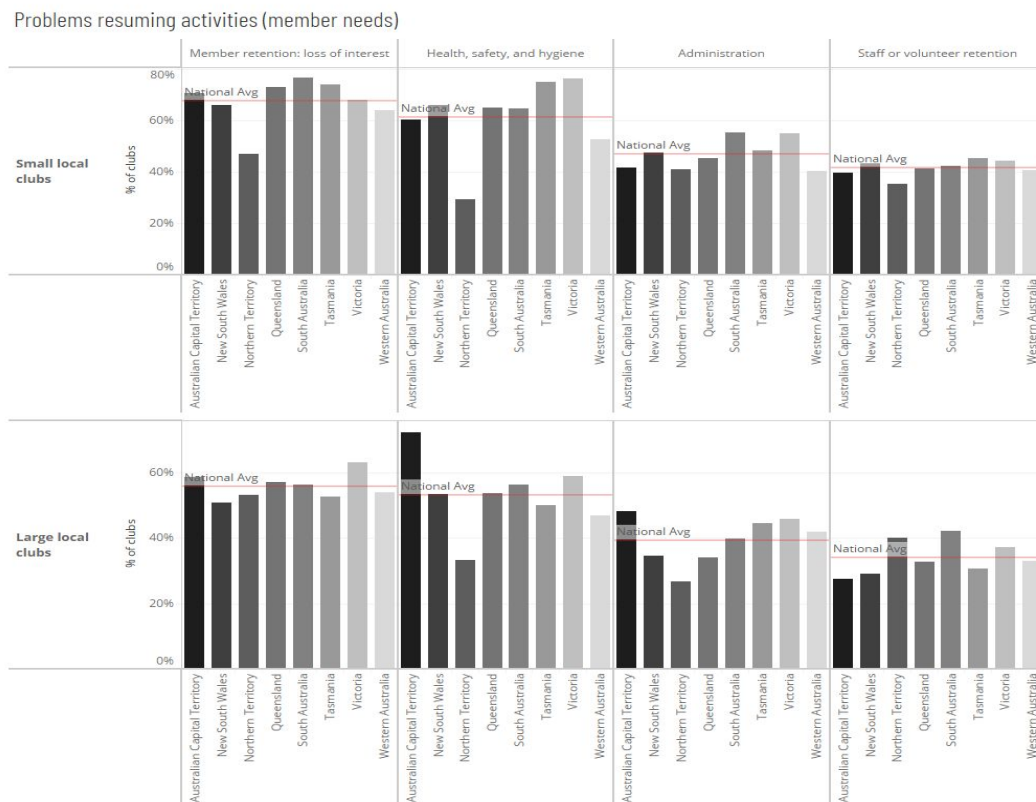
Figure 13 - Problems resuming activities (financial needs): by state



Victorian Small Local Clubs reported more difficulties with retaining members (on financial grounds), with a higher percentage of South Australian Small Local Clubs reporting difficulties with obtaining funds. ACT Small Local Clubs appear less likely to need to obtain funds to reopen and are also reporting less revenue loss from match days.

Northern Territory Large Local Clubs are reporting higher difficulties with obtaining funds to resume, and a higher percentage of ACT Large Local Clubs are concerned for their organisation solvency.

Figure 14 - Problems resuming activities (member needs): by state



A smaller percentage of Northern Territory Small Local Clubs have concerns with members losing interest. A higher percentage of Tasmania and Victoria Small Local Clubs report health, safety, and hygiene being problems for resuming activities.

For Large Local Clubs, ACT clubs are much more concerned about health, safety, and hygiene as a problem to resuming activities.

D. COMMUNITY DATA

Clubs serving specified populations that may have specific support or funding needs

Respondents were asked if their organisation **significantly** served any of the following populations, who according to Sport Australia's National Sports Plan (Sport 2030) currently are less likely to participate in sport (noting that multiple selections were allowed):

- Aboriginal and Torres Strait Islanders
- Culturally and Linguistically Diverse
- Elderly
- Girls and Women
- LGBTIQ+
- Low Socio-economic Status (SES)
- People with Disabilities

This section highlights the problems resuming activities from both a financial needs and member needs perspective, for clubs serving these specific populations.

Table 19 - Clubs serving specified populations

	Small Local Clubs	Large Local Clubs	Other Clubs	Total Clubs	% of sample
Aboriginal and Torres Strait Islander	500	234	49	783	19%
Culturally and Linguistically Diverse	476	180	45	701	17%
Elderly	345	190	47	582	14%
Girls and Women	1,462	701	145	2,308	56%
LGBTIQ+	218	118	30	366	9%
Low Socio-economic status (SES)	738	293	54	1085	26%
People with Disabilities	413	241	68	722	17%
None of these/no Specific Population	673	319	54	1,046	25%
Other Specific Population	150	70	26	246	6%

Figure 15 - Problems resuming activities (financial needs): Clubs serving specified populations

Problems resuming activities (financial needs)

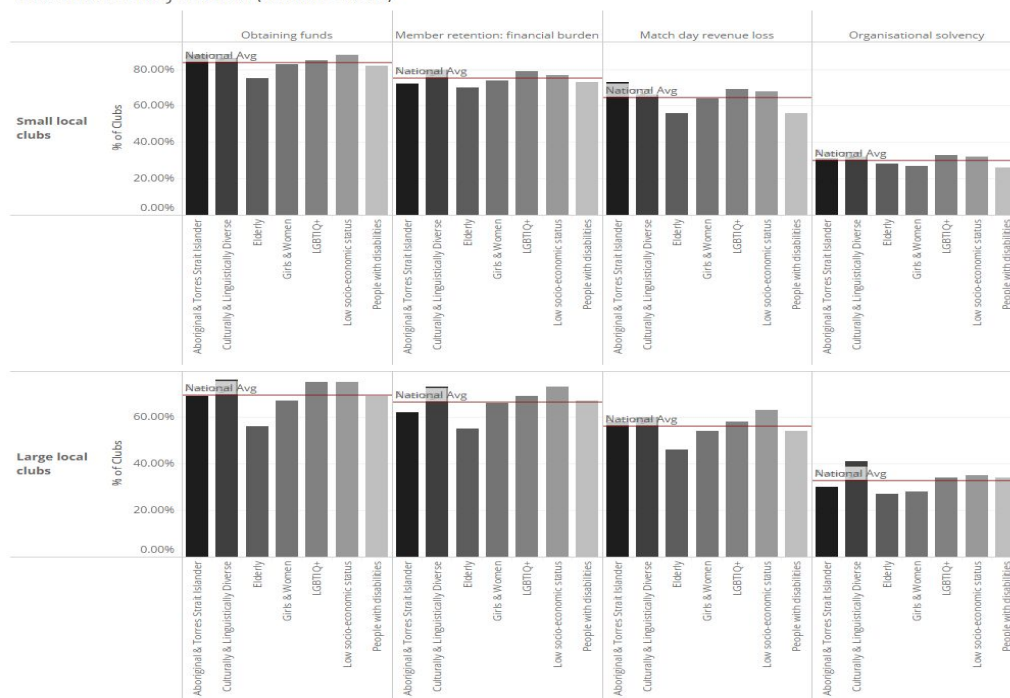
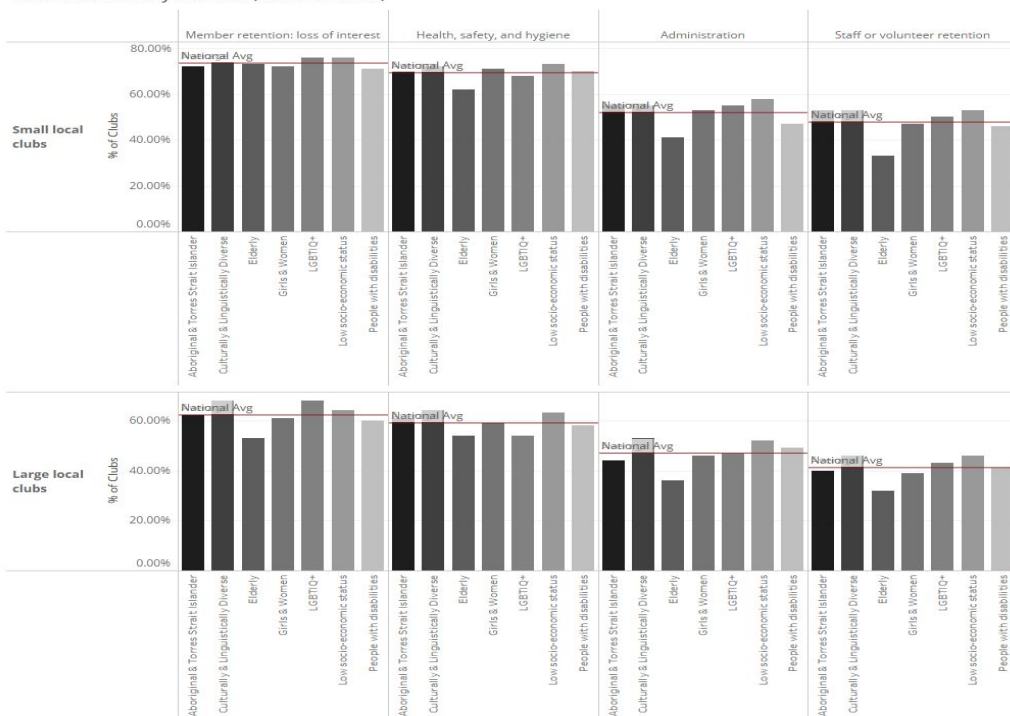


Figure 16 - Problems resuming activities (member needs): Clubs serving specified populations

Problems resuming activities (member needs)



As can be seen from the above tables, the funding requirements and other challenges for clubs significantly serving these groups did not differ materially from the national averages.

Information for Media

For media enquiries, please contact Jodie Artis at Progressive PR (jodie@progressivepr.com.au)

How you can help

For more information, or to find out how you can help, please visit

<https://covid.sportsfoundation.org.au/>

PATRICK WALKER

CEO

AUSTRALIAN SPORTS FOUNDATION

MARK STOCKWELL

CHAIR OF THE BOARD

AUSTRALIAN SPORTS FOUNDATION