

Queensland Community Sport and Recreation Clubs Survey: Impacts of COVID-19 as at August 2020

Summary of key findings

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Executive Summary

The COVID-19 pandemic has had an immediate and far-reaching impact on sport and recreation organisations throughout Queensland, and on Queenslanders who participate in these activities.

In March 2020, restrictions on movement and gatherings were brought in to help protect the health and safety of the Queensland community, including restrictions for community sport and recreation clubs. At the height of these restrictions, most community sport and recreation activities were not permitted.

Queensland sport and recreation clubs demonstrated adaptability and resilience through this uncertain and difficult period, paving the way for a return to play in June 2020.

The *Queensland Community Sport and Recreation Clubs Survey: Impacts of COVID-19 as at August 2020* was conducted to gain insights from clubs into their experiences in resuming activities. Results reveal the pathway out of restrictions and the implementation of a 'new normal' has been challenging for many sport and recreation clubs, and those impacts are still being felt.

Key findings include:

- Of the 73% of respondents who reported ceasing all activities due to COVID-19 restrictions, about 95% have resumed activities to various levels.
- Almost 90% of respondents reported additional costs involved in getting their clubs fit for play with extra hygiene and cleaning costs identified as the most common expense.
- The ability to generate revenue has declined with over half of respondents reporting a decrease in participant registrations and almost 60% reporting impacts to their fundraising activities. Participation decreases were mainly due to the financial burden and health and safety concerns.
- Respondents reported their greatest need moving forward was funding (50%).
- For some organisations, there have been surprising benefits including an increase in participation registrations (11%), a better sense of community, improved hygiene practices and the expansion of their online capabilities (69% of respondents indicated they would continue to use online engagement).

The Queensland Government recognises the impacts of the COVID-19 pandemic on the sport and recreation sector and has worked with the industry to provide a range of supports including additional funding, return to play guidance and initiatives to help Queenslanders remain active and engaged.

The findings from this survey will assist government to work together with industry partners, including QSport and Outdoors Queensland, to develop strategies to continue to assist the sport and recreation community in its recovery.

Message from QSport

Sport has faced challenges aplenty throughout 2020 as a direct result of the impact of COVID-19. In response, QSport has worked in collaboration with other peak industry bodies, the Queensland Government and advisory groups to provide assistance and assurance across the sport collective to find a way forward.

We continue to monitor the progress of the situation, identifying critical points like those highlighted by this survey, while following all advice from lead agencies to assist in managing the impact on the sport and recreation industry.

While there is no easy fix to the issues raised, we have an opportunity to work from within to achieve a sustainable return to play. The data collected provides a new benchmark that will inform decision-making and guide the development of future support mechanisms.

It is important now that we remain united, working together to reinvigorate community sporting hubs, creating a safe environment for the long-term benefit of the industry and Queenslanders alike.

Peter Cummiskey
Chief Executive Officer
 QSport



Purpose

The COVID-19 pandemic has impacted thousands of community sport and recreation clubs across Queensland, and the communities of members, volunteers, coaches, and families involved with them.

Queensland's COVID-19 restrictions for community sport and recreation clubs commenced on 24 March 2020.

In May and June 2020, the Australian Sports Foundation (ASF) carried out a survey to assess the impact of the COVID-19 pandemic on community sport across Australia. In July 2020, ASF published the results from this survey. A small Queensland data sample was provided in the ASF report.¹

Queensland clubs began a return to play and progressed to Stage 2 of Queensland's Roadmap to Easing Restrictions on 1 June 2020 and to Stage 3 on 3 July 2020.²

In August 2020, Sport and Recreation (previously within the Department of Housing and Public Works) adapted the ASF survey to measure any changing or emerging impacts of COVID-19 in Queensland during the return to play period.

Methodology

ASF undertook their survey to quantify the impact of COVID-19 on community sport clubs across Australia.

- There are an estimated 70,000 community sport clubs across Australia.¹
- The survey was open for five weeks from 19 May to 22 June 2020.
- 4,127 sporting organisations covering 99 sports across Australia responded to the survey (n=580 Queensland respondents including 486 small clubs³ and 94 large clubs⁴)

Sport and Recreation conducted the *Queensland Community Sport and Recreation Survey: Impacts of COVID-19 as at August 2020* to quantify the impact of COVID-19 on community sport and recreation clubs across Queensland once COVID Safe Industry Plans were developed and clubs returned to play (Stage 3 – 3 July 2020²).

Questions from the ASF were adapted to measure associated timing impacts, and to assist the needs of stakeholders in Queensland. The survey was open for 10 working days, closing midnight 28 August 2020.

The survey data collected 1,213 responses from sport and recreation clubs covering 99 activities across Queensland (Appendix 1 and 2). This response rate represents more than double the number surveyed across Queensland in the ASF survey.

The Queensland survey sample included:

- 89.9% (1090) of small clubs³
- ¹10.1% (123) of large clubs.⁴

The findings have been split into:

- impact of COVID-19 on club activities/operations
- future needs for clubs
- challenges ahead for clubs and the financial impacts of COVID-19 for clubs.

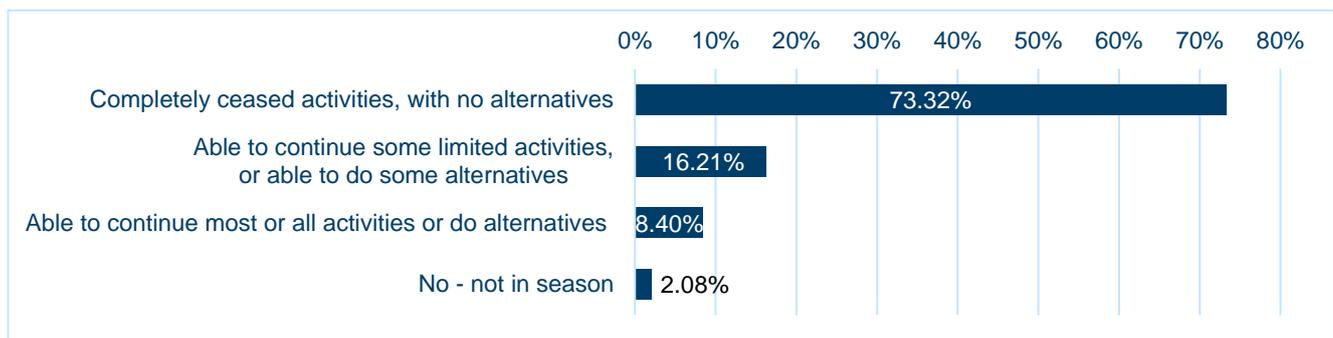
Please note, the potential for funding opportunities through both survey proponents (ASF and Sport and Recreation) may have impacted responses.

COVID-19 impact on Queensland community sport and recreation clubs

Restrictions on activities

In August 2020, 73.3% of respondents reported that their clubs had completely ceased activities due to restrictions during the COVID-19 pandemic.

Figure 1 **Ceasing of activities by clubs**



¹ Australian Sport Foundation (July 2020) Impact of COVID-19 on Community Sport

² Queensland Government, Roadmap to easing Queensland’s restrictions (Stage 1: 15 May 2020; Stage 2: 1 June 2020 (up to 20 people for non-contact indoor and outdoor community sport); Stage 3: 3 July 2020 (sport and recreation organisations following COVID Safe Industry Plan)

³ Small clubs are defined as sport clubs with fewer than 1,000 members and with less than \$250K in annual revenue

⁴ Large clubs are defined as sport clubs that exceed 1,000 members and \$250K in revenue

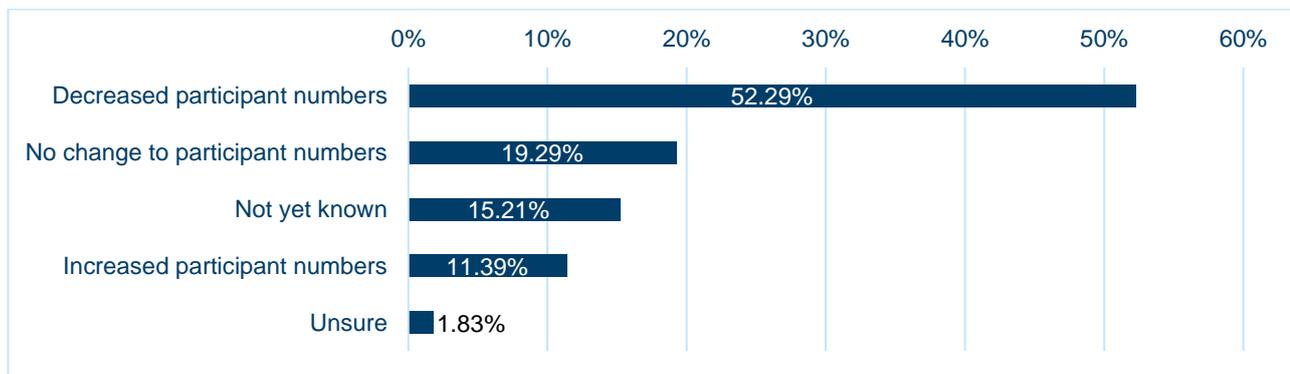
Of clubs that had ceased completely, most clubs have been able to resume activities to various levels since were lifted:

Response	Respondents
Completely resume activities with no changes	11.7%
Resume with some limited activities, or some alternatives	45.6%
Continue most or all activities or do alternatives	37.6%
Haven't resumed as not in season	4.99%

Participant registrations

At the time of the survey (late August) respondents reported that compared to last year, just over half had decreased participant registrations. Interestingly, 11.3% reported having increased participant registrations.

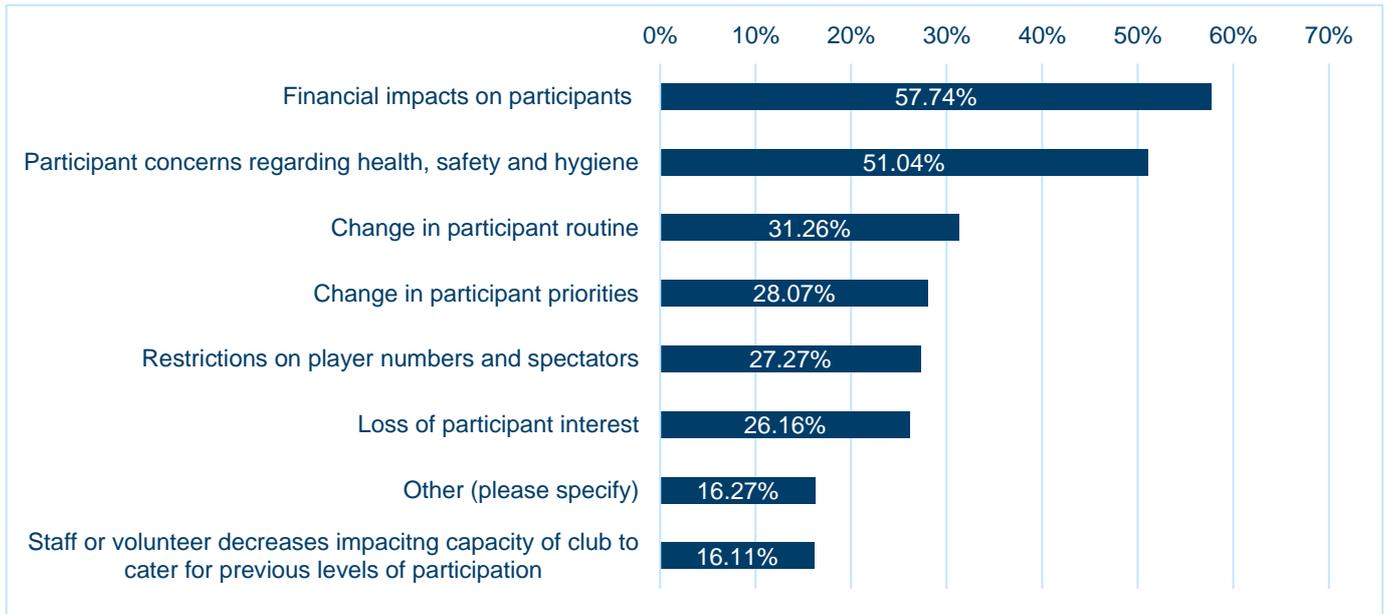
Figure 2 – Club participant registrations affected by COVID-19



Of the 11.3% of clubs who believed that participant registrations had **increased** (n=137), the majority cited an increase of less than 24%. The respondents indicated social connection (47%) and improved health outcomes (20%) as the key reasons for the increased participant registrations.

Of the 52.2% of clubs who believed that participant registrations had **decreased** (n=629), the majority cited a decrease between 10-50%. The respondents indicated the key reasons for decreased participant registrations were due to financial impacts on participants (58%) and participant concerns regarding health, safety and hygiene (51%).

Figure 3 – Reasons for decreased participant registrations in clubs (Multiple response question)



Since restrictions have been lifted, 56% of respondents indicated that less than 100 people (including members, staff, volunteers and spectators) in their clubs continued to be negatively impacted by clubs not being able to operate as normal. However, the number of people negatively impacted vastly ranged across clubs.

Continued COVID-19 impacts (positive (+) or negative) on participants, staff and supply chains quoted by respondents included:

Impacts

Participants

- Better sense of community (+)
- Decreased participants attending (recruitment and retention)
- Level of uncertainty (pay fees, attend, health and safety, hygiene controls)
- Parents unable to supervise/watch training
- Parent knowledge/support/share in success as unable to view training
- Restrictions on bathroom/change room facilities and convenience for participants
- Unable to cater for gatherings/functions
- Time cleaning and disinfecting by participants
- Changing regulations and training schedules
- Concerns of participating whilst threat of virus is around
- Concerns about a second wave
- Travelling to events
- Lack of spectators at events
- Less interactions and impact of club morale
- Cancelled (or restricted) competitions
- Disgruntled parents
- Lack of motivation

Staff

- Ability to conduct online meetings (+)
- Better hygiene practices (+)
- Lack of volunteers (recruitment and retention)
- Increased workload for committee members/coaches/managers
- Reduction in people willing to volunteer (people have changed their priorities)
- Increased administration time
- Increased responsibility and accountability for safety and compliance (especially on volunteers)
- Increased cleaning time and record-keeping
- Volunteer burnout
- Logistic and management issues
- Loss of staff
- Canteen restrictions
- Loss of coaching staff and resources

Supply chains

- Difficult to gain hygiene supplies
- Compliance costs (equipment, cleaning, signage, uniforms)
- Difficult to obtain stock and equipment supplies
- Manufacturing and delivery delays

Future needs

Club needs

Both the ASF survey and Queensland survey asked: *“What resources/assistance does your club need to manage or overcome difficulties that you are facing right now?”*

Clubs reported the following were their greatest needs moving forward:

ASF survey during COVID-19 restrictions - May/June 2020	Queensland survey during return to play - August 2020
<ul style="list-style-type: none"> ▪ Funding/finance ▪ Member subsidies ▪ Training in hygiene ▪ Additional volunteer resources ▪ Training in online or digital engagement⁵ 	<ul style="list-style-type: none"> ▪ Funding/finance (50%) ▪ Member subsidies (12%) ▪ Additional volunteer resources (11%) ▪ Training in online or digital engagement (2.5%) ▪ Training in hygiene to manage COVID-19 when return to sport (2.3%)
<i>Note: Australia-wide sample</i>	<i>Note: Queensland only sample</i>

Online engagement

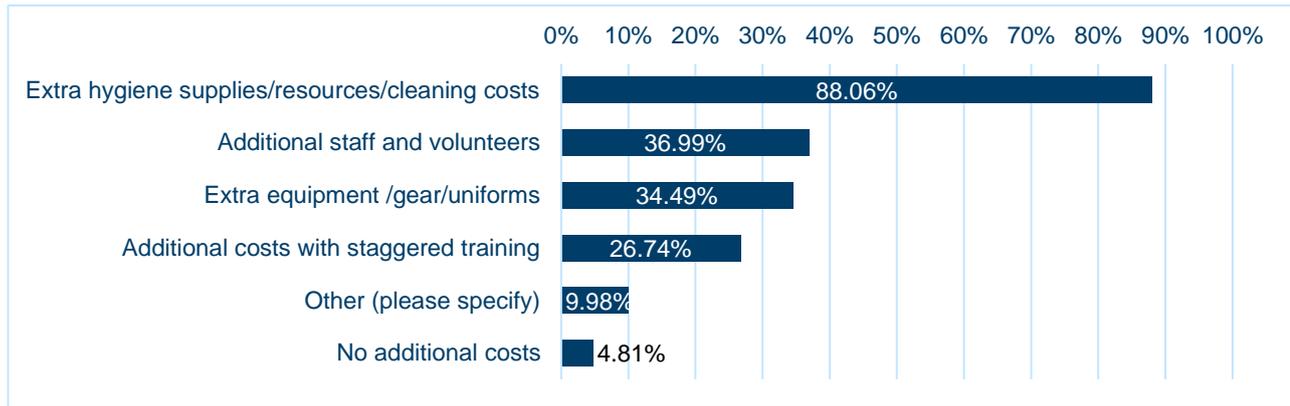
In Queensland, 25% of clubs reported that they started using online engagement during COVID-19, and a further 45% of clubs reported increasing their usage of online engagement. 43% of these clubs indicated that online platforms were used for community engagement, and a further 17% of these clubs reported online platforms were used for online classes or live training.

69% of clubs indicated that they would continue to use online engagement about the same level or more than during restrictions. Only 9% of respondents reported that they have not continued using online engagement.

Additional costs

Clubs reported additional costs were involved in getting clubs fit for play/competition due to COVID-19. Extra hygiene supplies/resources/cleaning costs was identified as the most common additional cost for clubs.

Figure 4 – Additional types of costs that have been involved in getting clubs fit for play/competition (multiple response question)



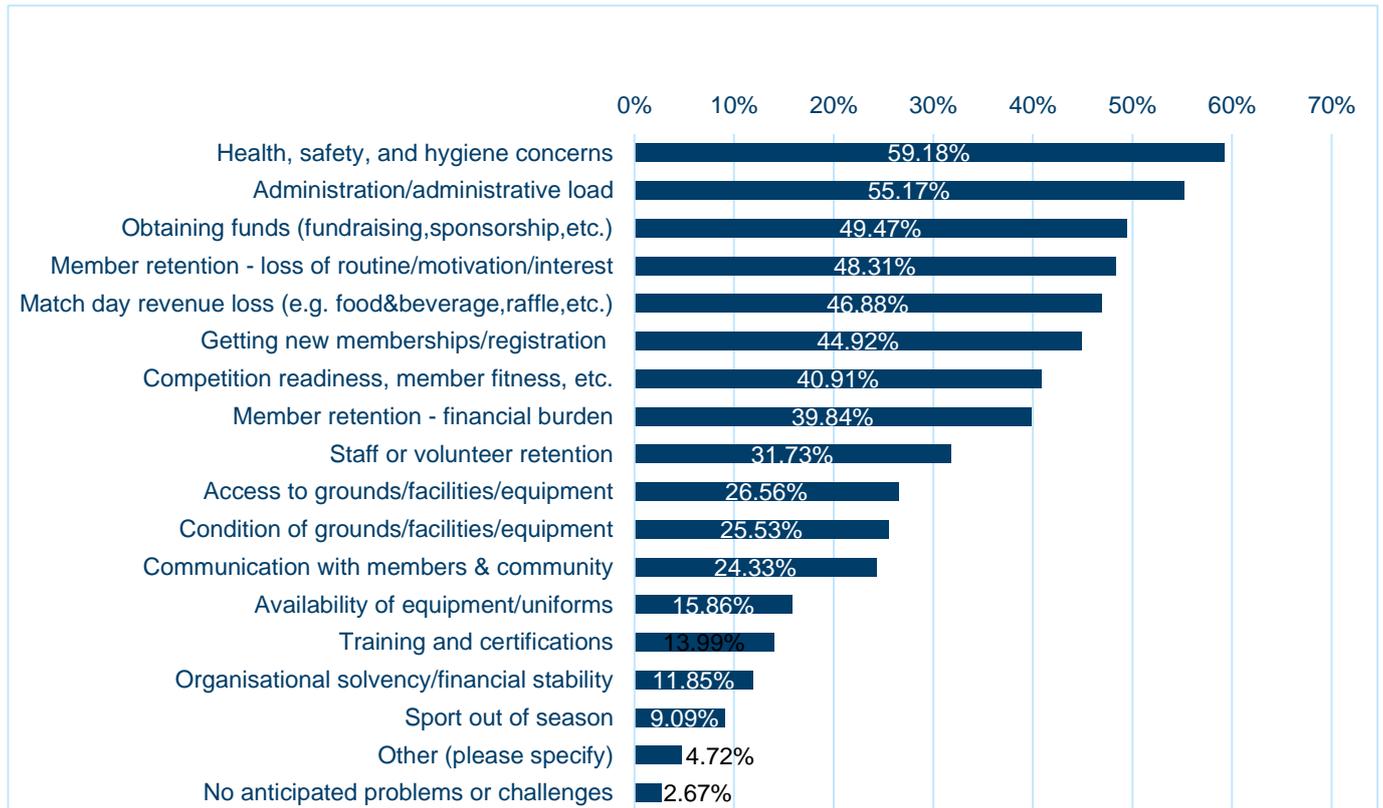
These additional costs were similar to the findings in the ASF survey during COVID-19 restrictions (extra hygiene supplies/cleaning costs (97%), extra equipment/gear/uniforms (50%)).

Challenges ahead

Identified challenges

In Queensland, clubs experienced a broad range of problems and challenges since resuming activities. The top problems and challenges included health, safety, and hygiene concerns (59%), administration/administrative load (55%), obtaining funds (50%), and member retention (49%).

Figure 5 – Challenges for clubs since resuming activities (multiple response question)



Only 3% of respondents reported they had not anticipated problems and challenges since activities were resumed.

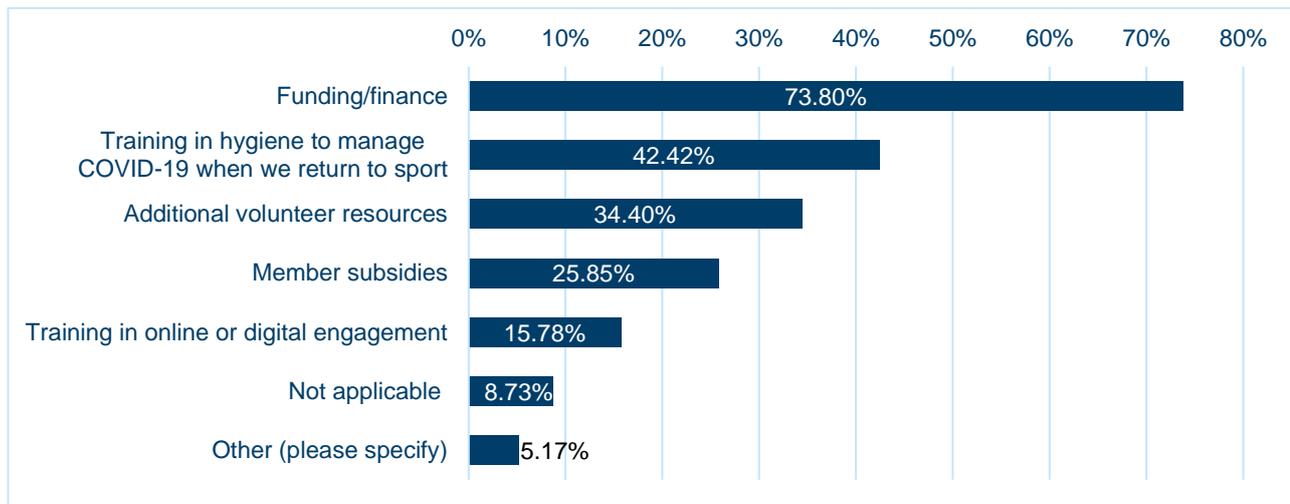
Of the respondents, 5% reported other problems and challenges including implementation of COVID-19 guidelines, change of conditions limited visitors, unable to hold fundraising events, loss of revenue from clubhouse functions/venue hire, competing for participants with delay of season for winter sports, maintenance costs and impact of travel bubbles.

Resources in need

Clubs have needed to use a range of resources and assistance to manage or overcome difficulties when resuming activities. Funding/finance (73%) was the key resource identified for clubs, followed by training in hygiene to manage COVID-19 (42%), and additional volunteer resources (34%). 9% of respondents reported ‘not applicable’ regarding resources needed to manage or overcome difficulties.

Other areas were identified including changing approach on fixtures to get players back, infrastructure/facility costs, access to school and community facilities for training, planning to host events, and increased commitment and time from existing committee members.

Figure 6 – Resources/assistance clubs needed to manage or overcome when resuming activities (multiple response question)



Since COVID-19 restrictions have been eased in Queensland, 62% of clubs reported that some of their participants or wider community expressed worries or concerns about resuming activities due to COVID-19. This demonstrates the amount of uncertainty COVID-19 has brought to participants and the community in relation to returning to sport and recreation activities and clubs.

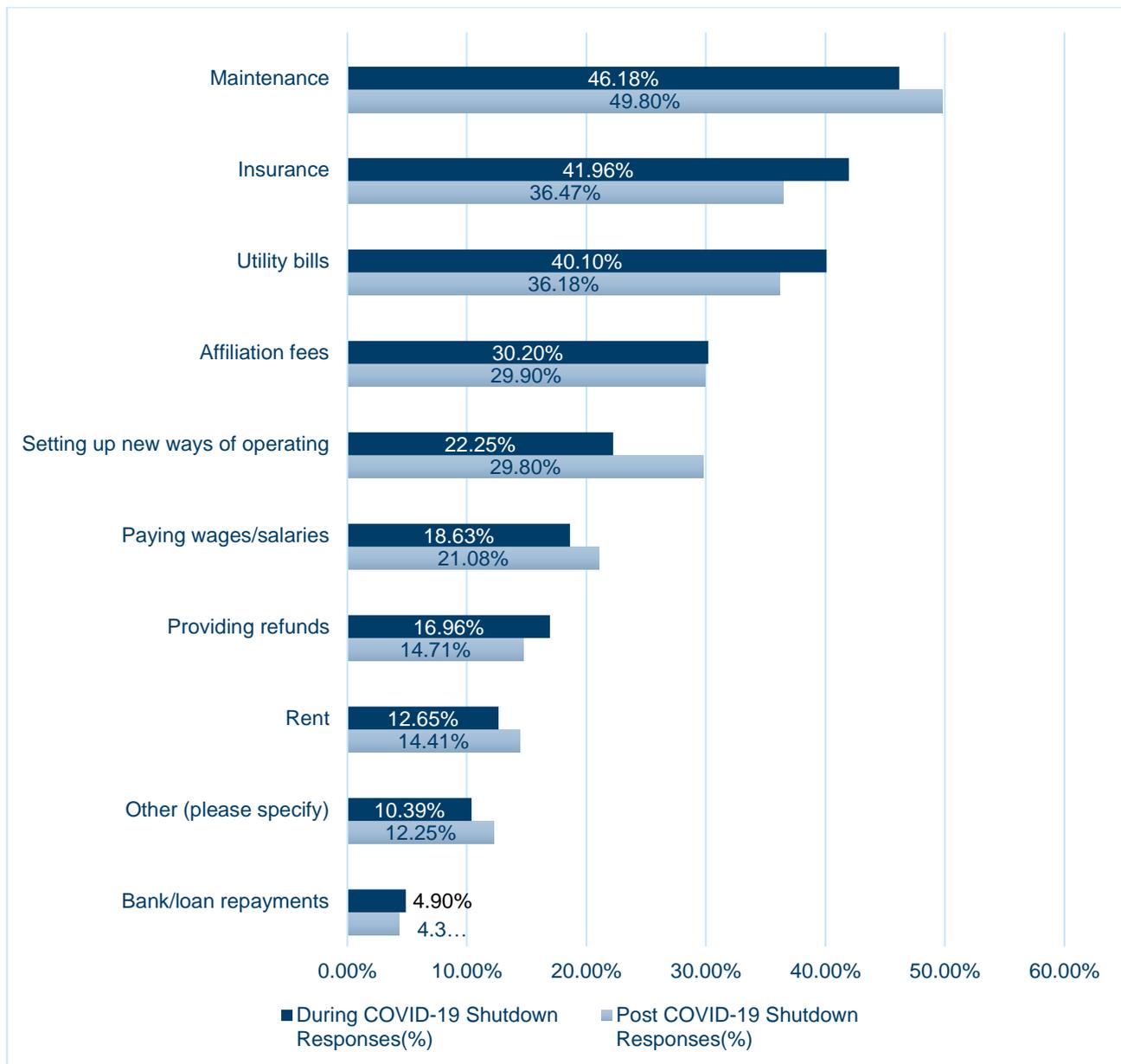
Financial/funding impact

A total of 1,020 respondents (84% of total sample) completed questions in relation to financial/funding impacts to their club.

Continuing expenses

The top 3 main costs for Queensland clubs reported by respondents for both during the shutdown period and after restrictions were eased included: maintenance, insurance, and utility bills.

Figure 7 – Main costs for clubs during and post COVID-19 shutdown (Multiple response question)



Other costs reported after restrictions were eased included: cleaning and hygiene, venue hire, equipment and permit fees.

These main costs reported by clubs after restriction were eased are similar to ASF findings for small clubs during COVID-19 restrictions such as utility bills, affiliation fees, maintenance and rent.

Staff expenses

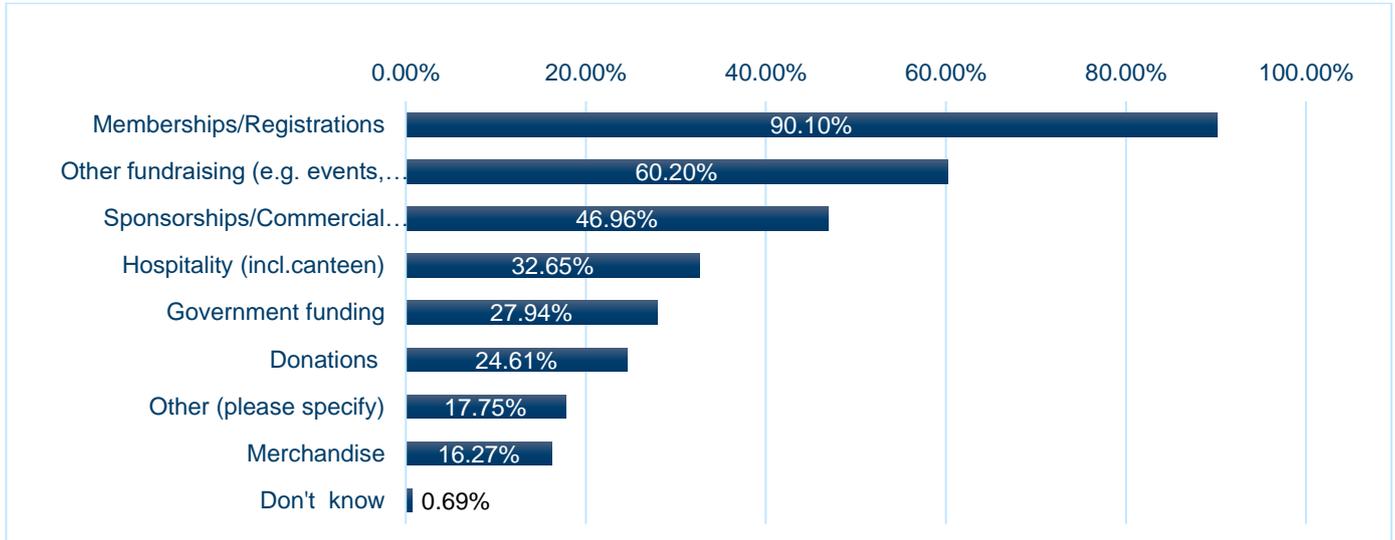
A total of 73% of respondents reported that they did not have any paid staff (full-time or part-time) eligible for JobKeeper payment. Of those who were eligible (n=273), the large majority of their staff (76%-100%) received the JobKeeper payment.

Revenue streams

Respondents indicated that the top 3 main sources of revenue in clubs included:

- memberships / registrations (90%)
- other fundraising (eg. events, raffles) (60%)
- sponsorships / commercial revenue (47%)

Figure 9 – Main sources of revenue for clubs (Multiple response question)



During COVID-19 restrictions (May/June 2020), the ASF survey reported that the main sources of revenue ceased or declined were:

- fundraising eg. events, raffles
- memberships/registration
- sponsorships/commercial revenue
- hospitality (including canteen)
- donations
- merchandise
- government funding

When asked the same question in August 2020, Queensland clubs reported that the same revenue streams have continued to be impacted since restrictions eased:

- memberships/registration (59%)
- fundraising eg. events, raffles (59%)
- sponsorships/commercial revenue (45%)
- hospitality (including canteen) (31%)
- donations (24%)
- merchandise (13%)
- government funding (8%)

Other revenue streams identified were competition/event fees, facility hire fees and grants.

Since restrictions have been eased, clubs reported starting the following new revenue-raising activities to help address the impact of COVID-19:

- additional sponsorships
- online raffles
- online fundraising
- other (funding grants (local and state government), merchandise, functions, social fundraisers, local business hosted fundraising (ie. BBQs), additional membership fees, advertising to regain participants)

The lack of volunteers to assist with revenue-raising activities (sponsorship or fundraising) was highlighted as a current challenge.

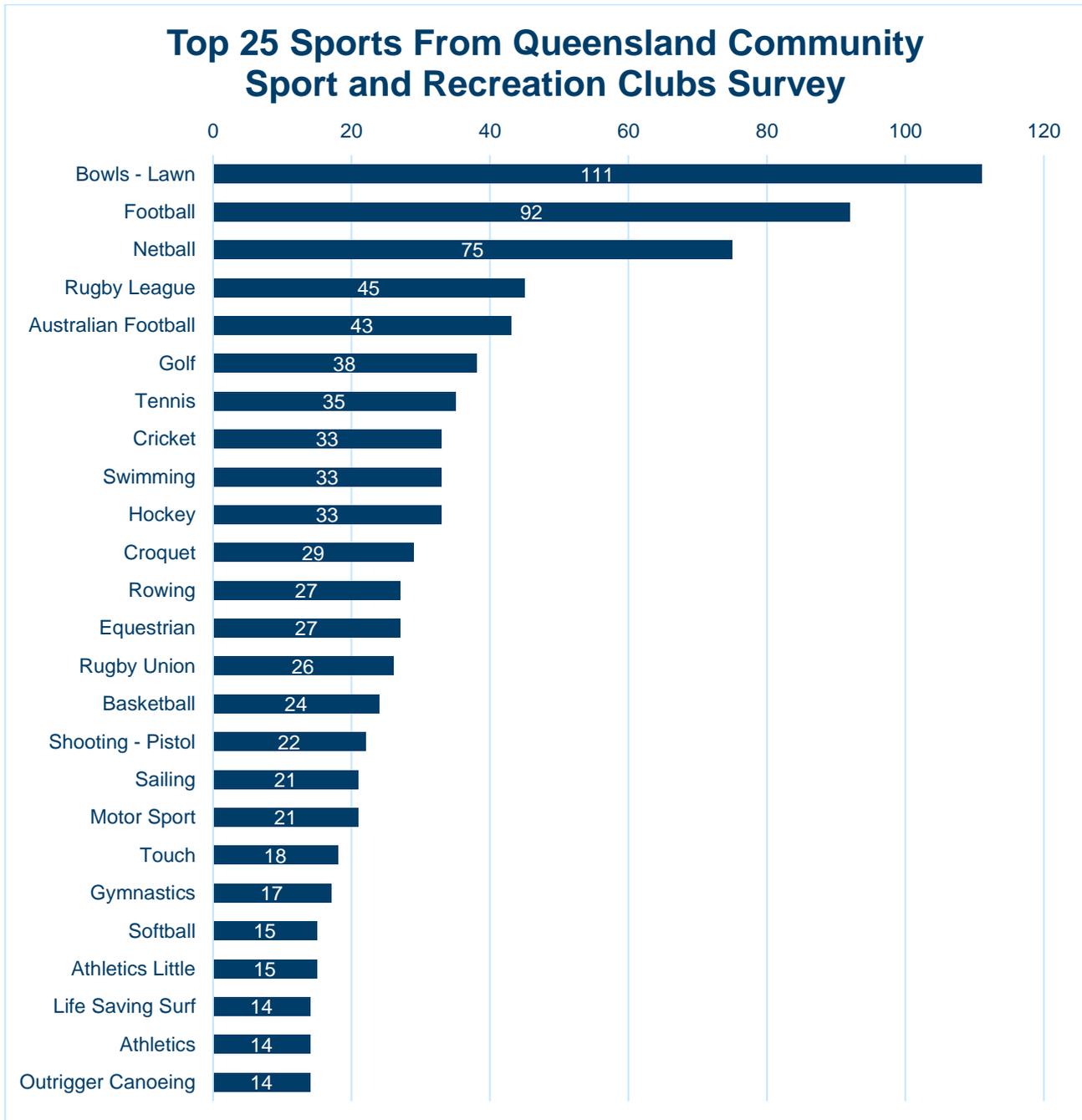
Financial impact

Based on survey respondents, the estimated negative financial impact since 1 March 2020 are:

- Small clubs (n=822) have lost an average of \$23,275
- Large clubs (n=89) have lost an average of \$166,101

9% of respondents (n=1,020) indicated that they had NOT had any financial impact as a result of COVID-19.

Appendix A: Data collected from 99 different activities (top 25 shown)



Appendix B: Heat map

