



Returning to Action: Evaluating Organisational Preparedness in the Wake of the Covid-19 Pandemic

Submitted to:
Ricky Boardman
Research and Development Manager
Sport and Recreation Alliance

Submitted by:
David Barrett and Richard Coleman
Sport Industry Research Centre
Sheffield Hallam University
Sheffield, S10 2BP

Tel: +44 (0)114 225 5920
E-mail: d.barrett@shu.ac.uk

15th April, 2021

SPORT+
RECREATION
ALLIANCE

Sheffield
Hallam
University | Sport Industry
Research
Centre

Introduction:

The research was commissioned to investigate the current outlook for community sport as Covid-19 restrictions are eased, with a dual focus on their experiences during the pandemic and their readiness to return to action. The survey focusses primarily on voluntary clubs, which are the setting in which around 4 million people regularly take part in sport, though other organisation types, such as private companies and sole traders delivering coaching are included in the findings. An understanding of this sector of the sports' market is crucial to developing policy responses which will underpin efforts to match and eventually surpass pre-pandemic levels of participation in the community.

This is the first and only major study to attempt to cut across the full range of organisations delivering active opportunities to communities in the UK. By encompassing the entire eco-system, the study enables organisations that support active opportunity deliverers to assess the impact of restrictions across a set of common metrics, produced using the same methodology. It therefore allows for the most expedient and effective interventions to be identified at the global level, supporting the delivery of strategic and timely policy responses.

What we did:

An online survey was developed with the final survey being distributed by National Governing Bodies (NGBs) and via the Sport for Development Coalition network in February and March. Responses were monitored regularly to ensure representation by individual sports using the 2017 study of affiliated clubs as a guide; Sport England produced this guide and also distributed the survey link for this project to clubs registered with its 'Club Matters' programme.

Respondents were asked to consider their position prior to the onset of the pandemic, to report the impact of the pandemic on their organisation at the time of their response (February, 2021); and to project the residual effects of this experience on their ability to reinstate active opportunities following the removal of restrictions. The questionnaire was designed to collect data relating to participation, workforce facilities and finance, in the context of the Covid-19 pandemic. The survey generated 1,406 responses from organisations providing more than 75 sports. There are notable variations in the proportion of organisations which are voluntary clubs. This has a material impact on how sports are affected by the pandemic. The majority of responses came from clubs located in England, with a small minority from the other home nations of the UK.

What we found:

The full results of the study are presented in the full document and summarised in the infographic below.

Impact on activity, participants, and workforce during the pandemic

The study found that throughout lockdown, community sport providers were unable to provide activity opportunities to their communities (99% reduction when compared to pre-pandemic levels). This is understood to have affected the physical and mental health of participants and volunteers. Volunteers and organisation leaders have remained at the helm throughout the lockdown (75% of administrative volunteers remained active during the pandemic). The survey shows significant enthusiasm from organisers to reinstate active opportunities as close to pre-pandemic levels as possible (86% felt that they would 'eventually rebound to where they were before'). The paid workforce suffered the most significant fall in numbers during the pandemic (dropping by 63% and projected to return at 86% of pre-pandemic levels after lockdown eases).

Impact on finances during the pandemic

The reduction of income (down 51%) has outpaced the reduction in expenditure (down 41%). This has meant that many organisations have had to rely on their savings to service bills and liabilities (18% average reduction on reserves). A significant proportion of respondents have deferred their liabilities until next year with the

hope of being able to service these with revenue generated from renewed activities (average increase in liabilities of 20%). The financial picture painted by this survey is that organisations are in a weaker position when compared to pre-pandemic levels, but not critically so (65% of organisations agreed that the pandemic would leave ‘permanent scarring’).

Reinstating Active Opportunities

With further support there is confidence of being able to reinstate a significant proportion of the active opportunities previously provided (overall activity opportunities projected to return to around 90% of pre-pandemic levels, with 76% of members/participants projected to return to responding organisations). The biggest barriers to reinstating active opportunities are centred on limited access to facilities (affecting 77% of organisations) and the capacity of volunteers to help organise and deliver activity (80% agreed that they will have reduced capacity due to having fewer coaches available). Should these two factors be addressed quickly then organisations will be able to return to a full programme of activity at a much faster rate. For organisations that need financial support, ensuring adequate access to loans and grants will also be key in expediting a full ‘return to play’ (71% agreed that they will need ongoing financial support to return to full capacity and 53% agreed that they will rebound more quickly with adequate financial support).

Key Themes

In terms of the overarching key themes from the study, the following were identified (these are explored in greater detail in the main report):

- **Facilities:** Organisations need the greatest level of facility capacity as possible to support return to play. This pertains particularly to schools, specialist facilities, leisure centres and community halls and spaces.
- **Volunteer workforce:** The volunteer workforce has remained in place but there is some sign of ‘strain’ amongst this group. This group is vital to reinstating activity opportunities and it will be important that this group are ‘looked after’ as the burden of leading organisations continues.
- **Resilience:** The survey shows that organisations remain in place with great enthusiasm to reinstate active opportunities for their communities.
- **Impact differentials:** The scale and scope of the challenges faced by different types of organisations is varied. However, organisations serving communities of higher deprivation and those serving communities with greater levels of ethnic diversity were adversely impacted to a greater extent than the average.
- **Loosening of ‘club’ ties:** Respondents projected a significant reduction in membership/participants. There is some concern that people will pivot to ‘lifestyle’ activities that do not require a ‘club’ structure or be lost to activity all together.

Implications of the findings:

The impacts of the pandemic have varied considerably between organisations according to the facilities they use, the activities they provide and the people whose participation they facilitate. The survey found that organisations serving deprived communities and communities with higher levels of ethnic diversity were generally affected to a greater degree than other providers. This may have implications for the future return on investment of sport and physical activity on social value outcomes in England.

What next:

Given the uncertainty surrounding the final timescales for the removal of Covid-19-related restrictions on sport and physical activity, it is recommended that the projections of community sport providers regarding their return to play and the key drivers and barriers that have affected them are revisited in a longitudinal study.

THE IMPACT OF COVID-19 ON THE VOLUNTARY SPORTS SECTOR



Rationale
Strategic planning



Method
Online surveys



Response
1,400+



Sub-samples
27 sports/activities with 30+ responses

MEMBERSHIP

60%

drop in membership during the pandemic



Forecast to recover to

76%

of pre-covid levels



PARTICIPATION

99%

of all activity stopped during lockdown



Forecast to recover to

90%

of pre-covid levels



WORKFORCE

Paid staff

63%

reduction in workforce during lockdown



Forecast to return to

85-95%

depending on role

Volunteers

75%

in admin roles and nearly half in facility management roles still active during pandemic



Forecast to return to almost pre-pandemic levels immediately



Volunteering time input to be higher post-pandemic



33% of clubs think they will lose coaches due to lockdown

FINANCE

Income

51%



Expenditure

41%



Reserves

18%



Liabilities

20%



Accessed Covid-19 Financial Support

43%



Average Covid-19 Financial Support

£12k



LIMITING FACTORS

1

Facilities - Leisure centres, schools and outdoor pitches



2

Availability of volunteers if facilities are open - especially coaches



Predicted outcomes and concerns

- Impact on participants
- Loss of habit among junior participants
- Loss of teams in team sports
- Participant switch to lifestyle activities
- Financial support to accelerate rebound



Sport and Recreation Alliance
Holborn Tower, 137-145 High Holborn,
London, WC1V 6PL

Tel: +44 (0)20 7976 3900
E-mail: info@sportandrecreation.org.uk

David Barrett and Richard Coleman
Sport Industry Research Centre
Sheffield Hallam University
Sheffield, S10 2BP

Tel: +44 (0)114 225 5920
E-mail: d.barrett@shu.ac.uk

SPORT+
RECREATION
ALLIANCE

Sheffield
Hallam
University | Sport Industry
Research
Centre