



SPORTAUS

EMERGING SPORT PARTICIPATION TRENDS 2021

The impact of COVID-19 on organised sport in Australia

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1. Introduction

In October 2021, the pandemic remains a threat across Australia but its full impact on the sporting sector is still emerging. However, an assessment of current evidence provides some insights into how organised sport has been affected so far.

This brief assessment of the emerging trends impacting organised sport in Australia, has been conducted to provide up to date insights, but also to potentially guide a future participation focus. Understanding how Australians' sporting habits have been affected could provide helpful context in assessing a future focus for Sport Australia.

Whilst the impact of the pandemic has been wide-ranging, from a sport perspective, there are at least three broad areas of interest and impact:



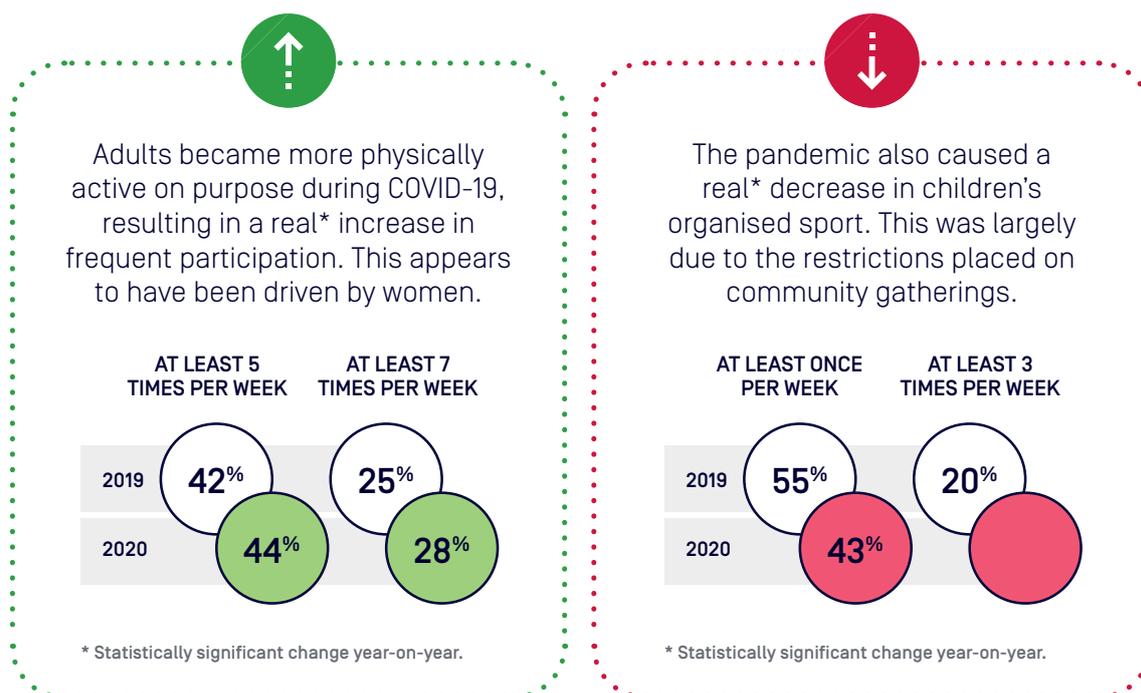
Each of these areas will be explored in more detail below.



2. Physical wellbeing

The pandemic has affected the sport and physical activity habits of Australians in many ways with the numerous participant cohorts responding differently. As an initial 'snapshot,' the June 2021 AusPlay survey data offered two interesting participation insights, reflected in Figure 1.

Figure 1: AusPlay 2021 - impact of the pandemic



Not highlighted in the graphic, but also interesting, is how older Australians responded during the pandemic. Despite being a high-risk cohort during the pandemic, this group demonstrated a greater appetite to be more physically active. These cohorts, plus others, will be explored in more detail below.

2.1 YOUNG AUSTRALIANS

COVID-19 represents a significant challenge for community sport as it learns to live with COVID-19. Compliance with social distancing policies, protocols promoting COVID-safe play environments, and COVID-19 specific training has, perhaps, permanently impacted the way that children and young people engage in organised sport. Naturally, some pre-pandemic habits will resume but it is also possible current changes to organised sport could be longer term.

For example, increased participation costs, a reduction in volunteers, and a reduced sport development workforce could create more barriers as the sport sector looks to recover from the pandemic and return to pre-pandemic activity levels.

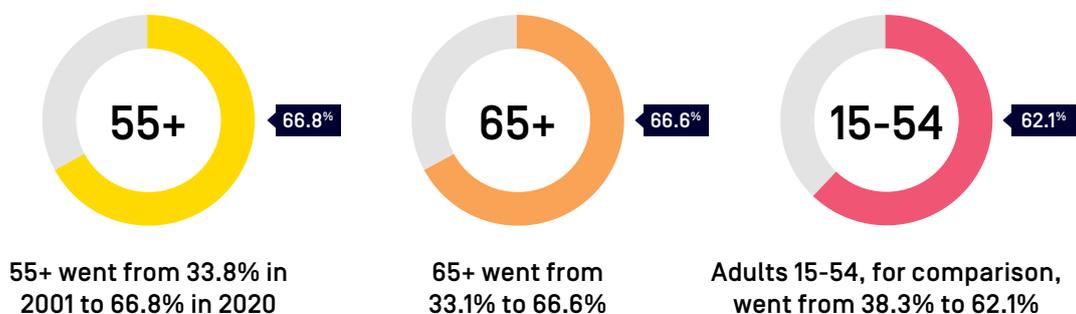
One concern is that with children missing out on sporting experiences during 2020, the pandemic may lead to a potential generation of young people 'lost' to organised sport. Understanding that the sporting and recreational habits we form in childhood can impact future adult behaviours, this absence of a sporting experience could have a lifetime impact on the health and wellbeing of many Australians.

A [national study on the impact of the COVID-19 pandemic](#) by the Canada Games Council revealed one in three young people were unsure if they would return to sport following the safe return to play, and one in five did not intend to return to sport after the pandemic. Additionally, Australian research has suggested that many participants believed that sport had become "too focussed on competition and winning before the lockdown occurred" [source: Elliott, S. et.al., *BMC Public Health*, March 2021].

With young Australians so significantly impacted by the pandemic and a possible ongoing legacy of the restrictions, this cohort might view organised sport differently in the future. Missing the early introduction with sport or dropping out at an influential age might mean some young Australians do not return to sport or never get to experience the benefits offered by a positive sporting experience.

2.2 OLDER AUSTRALIANS

Older Australians appear to have been more active during the pandemic *and* over a sustained period. When retrospectively tracking national sport and physical activity participation data (Exercise Recreation And Sport Survey (ERASS) and AusPlay research) over the past two decades, it is apparent older Australians were less active than other cohorts back in 2001 but in 2020 are more active overall—although the way they are active is more through recreational activities like walking:



This shows that, in the last 20 years, older Australians have made a bigger effort to increase physical activity (coming from a lower baseline) than the rest of the population.

During the COVID-19 pandemic, the [World Health Organisation \(WHO\)](#) warned that the impact on mental and psychosocial wellbeing of vulnerable groups, such as older adults, will be large and enduring.

The [United Nations \(UN\)](#) stressed that, although COVID-19 is in the first place a physical health crisis, it has the seeds of a major mental health crisis as well, especially for specific populations such as older adults, if action is not taken. It has been suggested that the measures taken by governments regarding social distancing and isolation, especially targeting groups at risk, can result in social isolation and loneliness.

One of the possible impacts of social distancing restrictions on older people is a reduction in physical activity. There is likely to be a reduction in both incidental physical activity because of reduced participation in community activities such as shopping and socialising, and a reduction in participation in formal exercise, such as attendance at exercise classes, gyms, golf, bowls, and other group activities. These activity and exercise restrictions may have negative effects on older persons because physical activity is linked to many health benefits in this population [[US National Library of Medicine, 2021](#)].

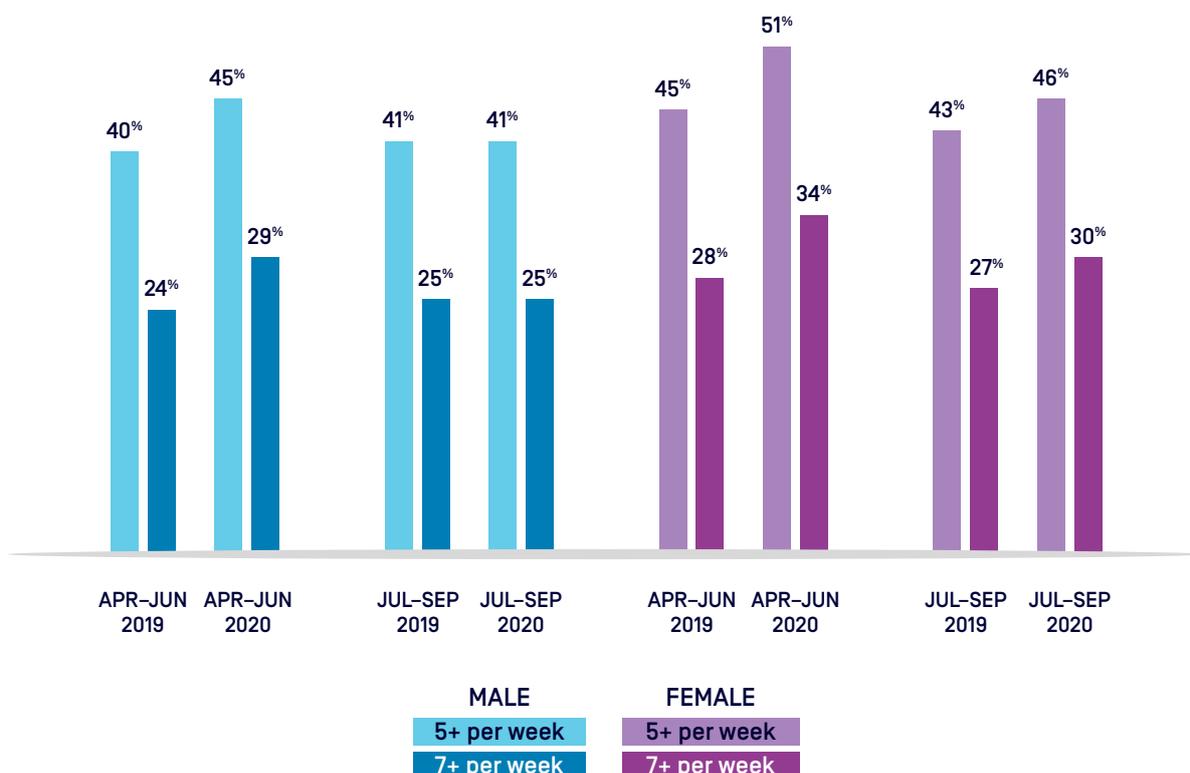
The pandemic has taken its toll on older Australians, but despite the restrictions, this cohort appears to have the desire to be more active and gain access to the physical activities and social interactions reduced through the pandemic.

2.3 WOMEN

In October 2020, using April-June data for 2019 and 2020, AusPlay reported that, as participation frequency increased, so did the gap between participation rates for both males and females. Data collected during July-September suggests that increased high frequency participation was only sustained by females.

The report also stated that females have consistently been more active on purpose across both waves of the pandemic. In contrast, the male data shows pronounced peaks and troughs, which may be explained by established activity behaviour. Women are more likely than men to participate in the types of physical activity, such as walking for daily exercise, which were still possible during periods of lockdown. Conversely, males play more organised sport, which was turned off and on throughout 2020.

Figure 2: Participation frequency by gender 2020



[The Grattan Institute \[2021\]](#) reported the COVID-19 recession hit women much harder than men and is expected to compound women's lifetime economic disadvantage. Women lost more jobs than men – almost 8% at the peak of the crisis, compared to 4% for men. They shouldered more of the increase in unpaid work – including supervising children learning remotely, taking on an extra hour each day more than men, on top of their existing heavier load; and they were less likely to get government support – JobKeeper excluded short-term casuals, who in the hardest-hit industries were mostly women.

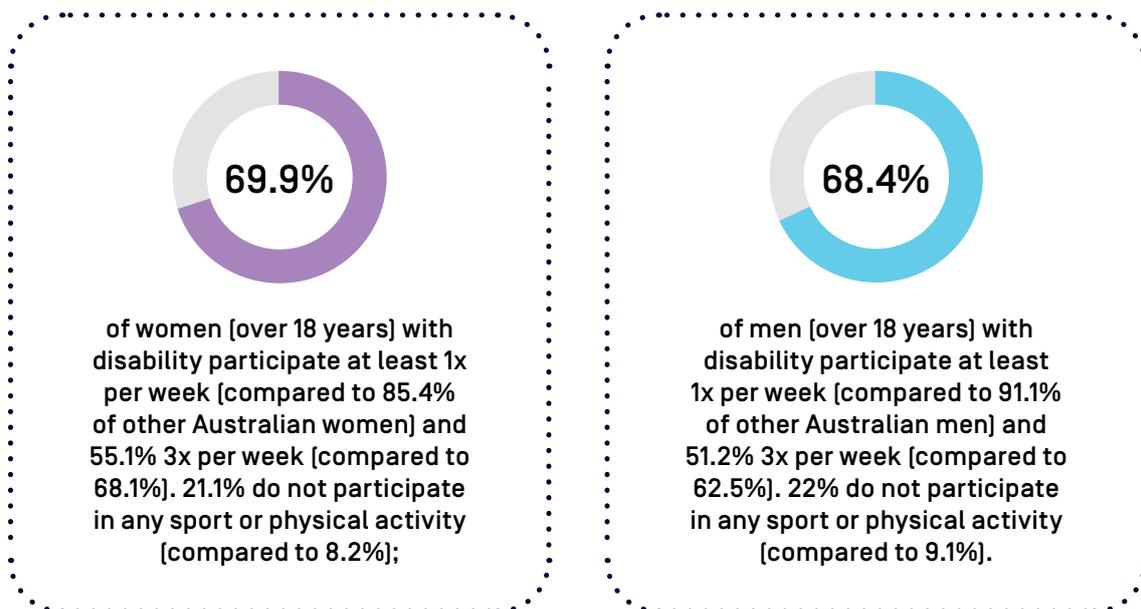
The report also stated that with women working from home, combined with school and childcare closures and increased unpaid work the crisis exacerbated existing gender inequalities. Many women reduced their paid work and study, especially mothers. Single mothers are yet to recover and were already among the most economically vulnerable. The 'extra' career interruptions during COVID-19 compound existing economic disadvantage for women.

With such an impact on women, the data on physical activity during the pandemic is encouraging and demonstrates women are actively seeking for different and more flexible ways to be active that fit around their everyday lives and challenges.

2.4 PEOPLE WITH A DISABILITY

While acknowledging the strengths, resilience, and impact of persons with disability in sport and our communities, they have significantly lower levels of sport and physical activity participation compared to the broader community and suffer from higher levels of negative health and wellbeing impacts.

The most recent AusPlay results [April 2021] show that 53.2% of adults who have a disability or physical condition that restricts life in some way participate at least three times per week in sport and/or physical activity (organised or non-organised). Compared to 65.3% of adults who do not have a disability, 21.5% of adults who have a disability do not participate in any sport or physical activity (compared to 8.7% of adults without disability). Data on children under the age of 18 years is not currently collected.



In August 2021 the ABC reported on the closures of day programs for people with disability causing serious harm to mental health, and the concern that the pandemic's impact on some of society's most vulnerable will be long term.

Research by the [UK Activity Alliance](#) has found that people with a disability are less likely to feel they have the ability to be active because of coronavirus and were less likely than non-disabled people to have found new ways to be active during the pandemic, be using exercise to manage their physical or mental health, or to have more time for physical activity. However, 78% of people with a disability surveyed said they would like to do more physical activity. This means that there is significant interest that can be used to improve engagement with sport post-pandemic.

The UK's [Annual Disability and Activity Survey](#), 2021 reported that COVID-19 has reversed progress made in levels of activity among people with disability and raised concerns the gains may not be recovered because of the ongoing effects of the pandemic. The survey stated that prior to COVID-19 the number of people with disability who were physically inactive had fallen to 34%, down 7 percentage points from 41% the year before. During the pandemic (2020/21), that number rose back to 39%.

Many programs and support services were unable to run during the pandemic, particularly during lockdowns as physical distancing was often not possible, especially for individuals with high needs. The effect on long-term participation trends is not yet clear. However, potential increased costs or reductions in accessible programs will have a significant impact on individuals and the broader disability community.

With the announcement of the 2032 Paralympic Games to be held in Brisbane now is the perfect time for sports to consider focussing on improving accessibility and inclusion practices to help increase engagement and participation by persons with disability. This can lead to positive individual, community and high performance outcomes.

2.5 ABORIGINAL AND TORRES STRAIT ISLANDER PEOPLE

During the pandemic evidence suggests that Aboriginal and Torres Strait Islander communities and individuals were significantly impacted and were identified as being at greater risk than the broader community for severe COVID disease.

Research from the Centre for Social Impact indicates financial hardship due to the pandemic could be greater for disadvantaged communities, particularly those where a higher proportion are Aboriginal or Torres Strait Islander peoples. The research revealed half of respondents in these communities did not have any money put away, and just under 40% said they would be able to get \$2,000 in a week if there was an emergency. This suggests there is likely to be high levels of stress for a lot of Aboriginal and Torres Strait Islander people, and other disadvantaged communities, in the face of an economic downturn.

During 2019 and 2020, an increase in physical activity was indicated in the AusPlay survey. This suggests there was an increase in the proportion of individuals within the community who were interested and able to be more active and start achieving the benefits of activity.



2.6 RECREATIONAL ACTIVITY

The pandemic removed or reduced access to organised sport, in some cases entire seasons of community sport was cancelled. In the absence of organised sport, Australians searched for alternatives to be physically active and accelerated a trend toward non-organised, or social, sport.

In 2013, the Australian Sports Commission and Commonwealth Scientific and Industrial Research Organisation (CSIRO) identified this trend in the [Future of Australian Sport](#) report. Called “The Perfect Fit”, this trend highlighted Australian preferences towards activities such as running, walking or going to the gym, suggesting people were looking for tailored activities to suit personal needs. Health, rather than competition, was becoming a major driver.

Under the cloud of COVID-19, Australians were about 3-5% more physically active during restrictions between April and June 2020 (AusPlay, 2020), at a time when organised sport was not possible for public health reasons. Increased messaging from Government regarding the importance of exercise as one of the few reasons permitted to leave home during lockdown, is also likely to have driven this increase and heightened people’s awareness of health benefits.

When considering which activities were the most popular for Australians, Figure 3 shows the prominence of non-organised, recreational activities during 2020. While this is influenced by the fact these activities are also COVID-19 safe, the trend towards these activities has been established even prior to the pandemic. Golf and tennis reported growth during 2020 but this has been attributed to the social (while still socially distanced) element of the game. Golf Australia indicated this trend had influenced a refocus on casual golf instead of competition-based golf.

Figure 3: Top ten activities with increased participants 2020



The cancelling of sport and the shutting down of gyms, combined with an increased awareness of personal health and wellness, led to an increase in outdoor activity. In January 2021, the ABC reported a surge in bicycle sales across Australia with manufacturers unable to meet demand and 12 month waiting lists for certain models. In the US, in 2020, 53% of Americans ages six and over participated in outdoor recreation at least once, the highest participation rate on record ([Outdoor Foundation, 2021](#)).

Technology also played a significant role with 39% of Australians using digital platforms to exercise during the national lockdown in 2020, according to a study by Deakin University. The study stated the increase in the use of digital platforms will continue as Australians invest further in wearable fitness tech, at-home fitness equipment, and apps. PWC also suggested that sport consumption shifted to digital means as esports were 'emancipated' from the shadow of 'traditional' physical sport offerings (PWC, 2021).

Sales of home fitness equipment soared by 411% in 2020 (ABC) and downloads of home fitness apps [increased by 47%](#) across Asia Pacific. Overall, while many people are likely to return to pre-pandemic habits, it is clear that digital offerings provide a popular alternative and their increased use in the future is likely.

Several sports also integrated digital options to replace organised sport during the lockdowns:

- Netball Australia – developed **Netfit** an online platform providing participants access to netball programs and workouts which could be performed at home.
- Football Australia – introduced **#PlayAtHomeChallenge** weekly football skills for participants to practise at home, challenge friends and post results on social media.
- AusCycling – established a partnership with virtual cycling platform, Fulgaz to provide members with access to virtual courses and races.

Whilst some of these were largely temporary measures, it demonstrates viable digital opportunities for sport to engage contemporary consumers and offer flexible products to suits evolving consumer demands.

Esports have been growing significantly for several years and a 2021 report from [PWC](#) suggests COVID-19 created an increase in gaming interest, both from new audiences and those Australians seeking an alternative form of entertainment, alleviating boredom and loneliness during lockdown.

PWC reported the interactive games and esports market accounted for 5.9 percent of the total Australian entertainment and media market in 2020. By 2025, this share is expected to grow to 6.8 percent, making gaming one of the highest growth rate sectors.

Hybrid sports, incorporating simulated sport in a digital environment, are also emerging and will only increase in sophistication, popularity and affordability, placing even more competition on traditional sport participation. With the introduction of 5G broadband in Australia, the capability to integrate simulated or virtual sports into the sporting industry is elevated. Faster transmission speeds and virtual network compatibility will support widespread adoption and provide a platform for the development of further innovation and the domestic growth of the virtual experience economy.

These participation trends indicate that many Australians are adopting recreational activities that meet their busy and social lives. Sport participation choices are becoming driven by flexibility, tailored by the needs of the individual, as highlighted through the 2013 CSIRO [Future of Australian Sport report](#) (Megatrends). COVID-19 has not so much created new trends in sport participation, more accelerated established trends. How many of the newly adopted trends remain for the longer term, remains to be seen but certainly there are opportunities of focus for organised sport to either mitigate or integrate the trends.

2.7 VOLUNTEERING

Prior to the COVID-19 pandemic over three million Australians volunteered in the sport and active recreation sector each year.

In April 2021, Sport Australia released the [Future of Sport Volunteering](#) report which highlighted the impact that COVID-19 has had on volunteers in the sport sector, including concerns about the potential for volunteer to not return to sport once restrictions are lifted, “only 53% of adults who volunteered in sport before COVID-19 were back volunteering by March 2021, and while there has been steady improvement in volunteers returning to sport in recent months, this is a critical time to ensure we are doing everything we can to attract and retain volunteers in sport.”

The report highlights several opportunity areas for the sport sector to consider, including better collaboration between community sport clubs to drive operational efficiencies, and reframing the perception of volunteering to enhance its value proposition. The opportunities are focused on action at the community sport level, while outlining the role for sport and volunteering bodies to enable this action.

Drawing on the insights from the report, Sport Australia worked with partners from across the sport and volunteering sectors to develop a vision for sport volunteering.

The [Sport Volunteering National Plan](#) outlines Sport Australia’s role in leading and supporting sport to navigate the evolving volunteer landscape. The impact of the national plan will be assessed annually over an initial four-year period.





3. Mental wellbeing

The pandemic has impacted the mental health of many Australians with numerous publications linking a decline in mental health to declining levels of physical activity and increased sedentary behaviour. A [2021 online survey](#) sought to understand why and how physical activity and sedentary behaviour had changed because of the pandemic, and how those changes impacted mental health.

The survey reported:

-  Respondents were less physically active [aerobic activity, -11%; strength-based activity, -30%] and more sedentary [+11%] during the pandemic as compared to 6-months before.
-  Respondents had increased psychological stress [+22%] and brought on moderate symptoms of anxiety and depression.
-  Respondents' whose mental health deteriorated the most were also the ones who were least active.
-  The majority of respondents were unmotivated to exercise because they were too anxious [+8%], lacked social support [+6%], or had limited access to equipment [+23%] or space [+41%].
-  Respondents who were able to stay active reported feeling less motivated by physical health outcomes such as weight loss [-7%] or strength [-14%] and instead more motivated by mental health outcomes such as anxiety relief [+14%].

This study demonstrates a direct link between mental health and physical activity and the value in remaining active during periods of high stress.

A recent study, funded by the [Natural Sciences and Engineering Research Council of Canada](#), stated this link is being further exposed during the pandemic. It suggested, during the initial stage of the pandemic, people who were less physically active had worse mental health.

In June 2021, the [Australian Bureau of Statistics](#) reported 20% of Australians experienced high or very high levels of psychological distress in the last four weeks, similar to March 2021 [20%] and November 2020 [21%]. Further, almost 30% of younger Australians (aged 18 to 34 years) experienced high or very high levels of psychological distress in June 2021, compared with 18% of people aged 35 to 64 years and 10% of people aged 65 years and over.

During the first national lockdown period of April to June 2020, it was [found](#) (through Sport Australia's Community Perceptions Monitor survey) that people who were finding it easier to keep fit and active reported feeling more optimistic and connected, with greater well-being. The segment of the population called 'Sport Lovers' appeared the most positive, and the 'Not interested [in sport]' the least positive.

The [Centre for Social Impact](#) predicted that the far-reaching economic and social impacts of COVID-19 will continue to take a toll on Australians' mental health. This is sometimes referred to as "the second epidemic" and evidence of this mental health burden is already emerging.

The implementation of social restrictions, combined with the removal of sport and other social opportunities has impacted the mental health of many Australians but the research supporting the benefits of sport participation on a positive mental outlook is clear. With an apparent ongoing impact on mental health, sport participation could play a valuable role in rebuilding mental health and reconnecting people.

4. Financial wellbeing

4.1 INDIVIDUALS

Paying for sport in the current financial climate could be a barrier for many Australians as the impact of COVID-19 has affected disposable income and influences spending choices. Financial concerns include job losses or reduced income from employment, businesses, or investments. Also, concerns about job security, career prospects and retirement plans; and the financial wellbeing of family members and the local community.

The [Australian Institute of Family Studies](#) stated Australians are mostly reducing their spending rather than increasing debt. There appears to be a high level of caution with spending, even among those whose income has not changed. The most common financial action taken was to cut down on non-essential expenses. This was followed by reducing spending on essential items such as groceries, and using money saved for other purposes to pay for everyday expenses.

Research from the [Centre for Social Impact](#) indicates financial hardship could be even greater for disadvantaged communities, particularly those where a higher proportion are Aboriginal or Torres Strait Islander peoples. The research revealed half of respondents in these communities did not have any money put away, and just under 40% said they would be able to get \$2,000 in a week if there was an emergency. This tells us there is likely to be high levels of stress for a lot of Aboriginal and Torres Strait Islander people, and other disadvantaged communities, in the face of an economic downturn.

With costs being an issue for many Australians, this will likely impact how much importance is placed on paying for traditional organised sports participation. Combined with the increasingly popular community trend towards free and lower cost outdoor and recreational physical activities, organised sport participation is at risk of becoming a more discretionary priority with many Australians.



4.2 SPORTING ORGANISATIONS

Sporting organisations primarily depend on membership income as a key source of revenue to fund ongoing operations and support their workforce. With sport cancelled across Australia, this lack of revenue is impacting sporting organisations at all levels and has placed the survival of some community sporting clubs in jeopardy.

In September 2021, the [Australian Sports Foundation](#) reported nearly 83% of community sport clubs surveyed reported lost revenue across sponsorships, fundraising and membership income. With minimal financial reserves, over 12% of clubs (approx. 9,000) expressed concern for ongoing financial risk.

Exacerbating this concern is the ongoing operational costs that are reported to have either stayed the same (88%) during the pandemic or increased (47% reported). The most common increased cost lines included new hygiene measures and extra equipment due to COVID-19 protocols, member refunds (due to shortened or abandoned seasons), and overheads (such as insurance).

A survey by the [Sport and Recreation Alliance](#) in the UK also reported a decline in grassroots sport during the pandemic, suggesting around 60% of members were lost. Although clubs reported they expected to recover about three quarters of pre-pandemic memberships, that will require a vast amount of effort and substantial funding.

Even the Olympic success has not driven a surge in community sport memberships with insights from the UK suggesting the usual [post-Olympic growth](#) has been slow to emerge.

With reduced revenue, possibly for a period beyond the pandemic, many community sport clubs will struggle, especially if additional costs are required to create COVID safe environments. The impact on the paid workforce across sport could lead to an even greater dependence on volunteers to fill key roles, placing an even greater emphasis to create positive volunteering environments.

The impact of the pandemic has also been felt at the national level with a broad range of NSOs reporting a significant decline in annual revenue. Analysis undertaken by Sport Australia of National Sporting Organisations (NSOs), with a December 31 financial reporting year-end, revealed an average revenue reduction of 32% across 17 NSOs from 2019 to 2020. Whilst 14 of these NSOs reported a surplus, this aggregate surplus of \$5.1 million appears to be underpinned by \$9.5 million of Government Stimulus support; with the remaining three NSOs reporting an aggregate deficit of \$30.1 million, despite reporting a combined \$7.2 million of Government Stimulus.

With Federal Government Stimulus payments no longer available, the full financial impact of the pandemic on NSOs is still uncertain. NSOs with a June 2021 financial year-end are expected to provide detailed financial reporting to the ASC by mid-November 2021.

With 2020 financial reporting as a guide and Federal Government Stimulus payments removed, it is likely some NSOs will be in a weakened financial position. NSOs are looking to lead their respective sports through recovery but the reduced level of finance and/or resources could impact their ability to do so. When considering an aspiration to rebuild pre-pandemic membership levels or consider new approaches to organised sport, consistent with contemporary demand, the challenges for some NSOs could be great.

4.3 AUSTRALIAN ECONOMY

The pandemic has impacted the Australian economy in many different ways but the Organisation for Economic Co-operation and Development (OECD) reports the pandemic recession in 2020 was milder than in most other OECD countries. It suggests, as the recovery becomes more firmly entrenched, public policy must focus on setting the conditions for another prolonged period of strong and well-distributed growth in living standards. At the same time, steps should be taken to prevent the economy from future economic shocks and ensure the financial sector supports household financial resilience.

Economic analysis by KPMG (May 2020) estimated that the Australian sports industry generates approximately \$32.2 billion in sales (based on 2016/17 data), resulting in a contribution to gross domestic product (GDP) of approximately \$14.4 billion and supporting approximately 128,000 full-time equivalent jobs. This equates to approximately 0.8% of GDP and 1.5% of total Australian employment.

Sports operations, including the administration, governance, delivery and support of sport and recreation participation activities across the country is the largest segment of the industry. This segment accounts for 44% of industry sales, 38% of industry value add, and 47% of industry employment.

The impact on the financial wellbeing of the sporting industry impacts the national economy and efforts to rebuild the industry should be considered as part of a holistic, national economic recovery strategy.



5. Focus Areas

This brief exploration into some key trends impacting Australian organised sport participation has revealed both worrying trends but also valuable opportunities. COVID-19 has influenced many aspects of society and some new habits or behaviours will likely be long-term. Whilst it is likely many Australians will return to pre-pandemic habits and organised sport will also return to normal, is that the best outcome? Has the pandemic provided sport with a pathway to rebuild, address long-standing trends and adapt to meet modern demands?

The trends identified within this assessment are not exclusive; but they do appear prominent and provide Australian sport with a guide as to areas of possible risk and opportunity. Further exploration into these trends is recommended to better understand how they might affect the diverse range of sports, and sport participants. To learn to live with COVID-19 and identify how sport might emerge from the pandemic more resilient and more relevant to contemporary consumers.

When consolidating the above research and evidence, there are at least three areas of focus for sport to consider in the future.

5.1 COHORT FOCUS

Young Australians have certainly been the most impacted by the pandemic across many areas of social importance and the concern for their physical activity habits is further exacerbated by the significant concerns over their mental health. Young Australians have not only missed out on sport during the last pandemic, but also the valuable social interactions that help shape young lives. It is possible the impact on our children could have a longer-term legacy into their adult lives and future health and wellbeing. Even prior to COVID-19, youth participation was a concern, and a renewed focus could provide young Australians with improved access to sport and broader life benefits. The role of schools connecting with community sport clubs more effectively could provide value to children but also to community sport as it looks to recover lost revenue.

Women and older Australians have demonstrated a desire to be more active during the pandemic, although not necessarily in traditional sporting environments. With both cohorts having been significantly affected across wellbeing and financial factors, there is potentially an opportunity to leverage the recent increase in participation to target this cohort and ensure organised sport includes suitable activities to attract and retain. The social or informal aspect of participation has been a key driver of attracting both of these cohorts and this could provide sport with valuable insight into how to engage and retain.

Many people with a disability have been unable to access physical or social activities during the pandemic and some do not have the ability to adopt new recreational activities as substitutes. It is likely, some Australians with a disability have not been able to be consistently physically active during the pandemic and so returning to pre-pandemic habits might be challenging. The risk of people with a disability not returning to sport should be considered and opportunities to re-engage better understood.

5.2 CONTEMPORARY FOCUS

Social and recreational habits constantly evolve and Australians now have a greater number of recreational and leisure choices that might better suit their lifestyles. Organised sport must now compete with more social or informal options and the growth of digital or online/virtual activities will continue to evolve and become more accessible and affordable.

As Australians seek different ways to be physically active, sport must find different ways to attract contemporary customers. Sport, possibly more than ever, can play a valuable role in the lives of Australians but only if it meets social demands and appeals to a diverse community with busier lives and less money to spend on non-essential items.

In 2017, the Boston Consulting Group (BCG), released its Intergenerational Review of Australian Sport which outlined several key areas where Sport Australia could focus to promote the growth of Australian sport. The review highlighted a key factor to participation growth included the “modernisation of entry level products” and the development of “new and targeted offerings” – for example:



MAKING SPORT MORE AFFORDABLE FOR LOW INCOME FAMILIES



MAKING SPORT MORE ACCESSIBLE TO MIGRANT GROUPS



MAKING SPORT MORE ATTRACTIVE TO WOMEN

The evidence on contemporary sport and active recreation habits are already established. It is likely sport will return to normal on many fronts but that will not change the direction of pre-pandemic trends. As sport looks to rebuild membership levels and grow organised sport participation, the activities of Australians when sport has not been accessible provide a roadmap for how sport might re-engage with its users and perhaps reach new users, previously not attracted to traditional sport (or competitive) offerings.

Change will be easier for some sports than others due to many factors including resources, capability and possibly even a readiness or desire to change. Perhaps this creates a risk of those sports lacking the resources to adapt, falling behind those able to respond more swiftly. But, even with limited resources, a review of current participation offerings to align with contemporary demand could build resilience and facilitate growth.



5.3 COST FOCUS

This paper highlights the impact to many Australians' finances and this impact could be widespread and ongoing. Current indications suggest non-essential spending will be impacted for several years and this could include sport participation costs, especially if trends towards active recreational pastimes are also considered as an alternative. With many community sporting clubs relying heavily on membership income, a prolonged decline in membership registrations and anticipated income would be devastating.

Declining income levels at sporting peak bodies could impact workforce levels and subsequently inhibit capacity to implement change or just maintain demand. The sport sector is already dependant on volunteers across all levels and this might become even greater with a reduced paid workforce. With a risk of ongoing reduced revenue and a reduced workforce, many sports might need to consider innovative approaches to workforce or operational efficiency as they attempt to return to pre-pandemic performance at reduced capacity.

The Australian Government is limited constitutionally with its ability to manage a voucher scheme autonomously but can potentially work in partnership with the jurisdictions and sports to develop a shared business model and deliver a joint program.

If cost is a barrier to organised sport participation, how can the sector react to mitigate this and support more Australians to afford access to sport?

6. Summary

This paper is just a summary assessment of trends currently impacting organised sport and deeper exploration is recommended to better understand how these trends relate to specific sports and the broader sector. The relevance, impact and future steps to accommodate or mitigate these trends will likely differ across the various groups but it is also likely there will be many opportunities to collaborate.

Further discussion is encouraged, and Sport Australia will be reaching out to its immediate stakeholder group, plus extended network to invite those conversations and build even greater evidence and wisdom to help guide the Australian sport sector. As we enter the "green and gold" runway and a greater focus on Australian sport in the coming years, the value of promoting 'our sporting nation' becomes even more imperative. How sport responds to the impact of the pandemic could help re-establish the value proposition of organised sport and contribute towards a golden era of sport in Australia.



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