



JUMPSTART STATE OF SPORT REPORT

March 2021

Message From the President

At Jumpstart, we have a single-minded focus on improving the wellbeing of children by enabling access to sport and play for kids across Canada. But over the last year, the COVID-19 pandemic has had a deep and devastating impact on the landscape of community sport in Canada: from the closure of recreational facilities, to the modifications of — or cancellation of — sport programming, to the significant financial losses being faced by community sport organizations.

In September 2020, Jumpstart launched its Sport Relief Fund, an \$8 million fund dedicated to helping sport and recreation organizations continue to operate through 2020. It provided support in the form of grants that helped cover programming and operational needs in order to ensure continued opportunities for kids across the country to play. However, the overwhelming response to Jumpstart's Sport Relief Fund in 2020 demonstrated a far greater need for support than anticipated, which led us to commission this study.

To build back sport and play means understanding the full scale of the challenges we're facing and that's exactly what this report is intended to do. The Jumpstart State of Sport Report highlights the findings of a research study we undertook in partnership with Ipsos to understand the impact of the COVID-19 pandemic on access to sport in Canada — and the findings make it clear that Canada's recreational sport ecosystem is in dire need of support.

52% of community sport organizations not permanently closed are concerned about the permanent closure of their organization in 2021. And 81% of sport organizations not currently closed are worried about their ability to offer programming in 2021. Despite many sport organizations facing bankruptcy, their commitment to the kids they serve remains steadfast as survey responses indicate that their concerns continue to be focused on the health and wellbeing of youth and how these recreational closures are impacting them.

This crisis at the grassroots level is matched only by the one facing Canada's children who are experiencing high levels of trauma and social isolation due to the pandemic. Sports give children a chance to boost their self-esteem, nurture their creativity, help them excel in school, and connect to their communities. Sports help kids reach their full potential. And the absence of sport during these tumultuous times has led to a decline in both the physical and mental health of children. According to our study, the majority of parents say their kids are feeling isolated and lonely and are finding it hard to reduce stress and anxiety, and 69% say that their kids are already showing signs of being less physically fit.

At Jumpstart, we understand that sport and play aren't just 'nice to haves' — they're the foundation of a healthy and thriving Canada. Our country, our communities and our children need sport more than ever. Through the continued efforts of our Jumpstart Sport Relief funding and the findings shared in this study, we hope to shine a light on the importance of sport in Canada and inspire others to help us on the journey of building back our sport and recreation sector for every child across Canada.



Scott Fraser
President, Canadian Tire Jumpstart Charities



ACKNOWLEDGEMENTS

Thank you to the following experts for your guidance and input on this report, as well as our Jumpstart Sport Relief Fund program and the related funding recommendations.

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- Benoit Huot, Paralympic Gold Medallist and Jumpstart Ambassador
- David Legg, Professor, Health and Physical Education, Mount Royal University
- Norm O'Reilly, Director, International Institute for Sport Business and Leadership
- Beckie Scott, Olympic Gold Medallist and CEO of Spirit North
- Fabrice Vil, Founder and Executive Director, Pour 3 Points

Thank you as well to every individual and sport organization who took the time to share their experiences with us. Your stories make this report richer. We are committed to working together to help you thrive again.



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SURVEY FINDINGS



THREE KEY TAKEAWAYS

1) The infrastructure of recreational sport in Canada is crumbling

- Three in 10 sport organizations are temporarily or indefinitely closed.
- Six in 10 are attempting to run modified programming.
- A third of sport organizations are bankrupt or approaching bankruptcy.

Community sport and recreation organizations are in deep crisis.

2) The impact on Canadian youth is severe

Sport organizations aren't the only ones in crisis.

- 74% of parents say their kids are feeling isolated and lonely.
- 64% say kids are finding it hard to reduce stress and anxiety.
- 69% of parents say that their kids are already showing signs of being less physically fit.

And those numbers are significantly higher for kids whose participation in sport has been impacted by COVID-19.

3) A 'return to normalcy' in sport won't be quick or easy

When Canada is ready to return to sport, there are no clear indicators that sport will be ready for Canada.

- 52% of community sport organizations not permanently closed are concerned about the permanent closure of their organization in 2021 as a result of the COVID-19 pandemic.
- More than three-quarters of all organizations believe it will take more than six months for the recreational sport sector to return to a "pre-COVID state."

And so while 87% of parents say that their kids are very much looking forward to a return to sport and play, the impacts of the COVID-19 pandemic will be felt for months — and likely years — to come.

“The effect on our youth will be felt for years as these kids have lost confidence, friendships, motivation, and an area to just be free and themselves. I’m worried that when combined, we are going to see a drop in sports enrolment at approximately 30%... due to lack of interest, and cost to families due to the economy.” –Survey Respondent



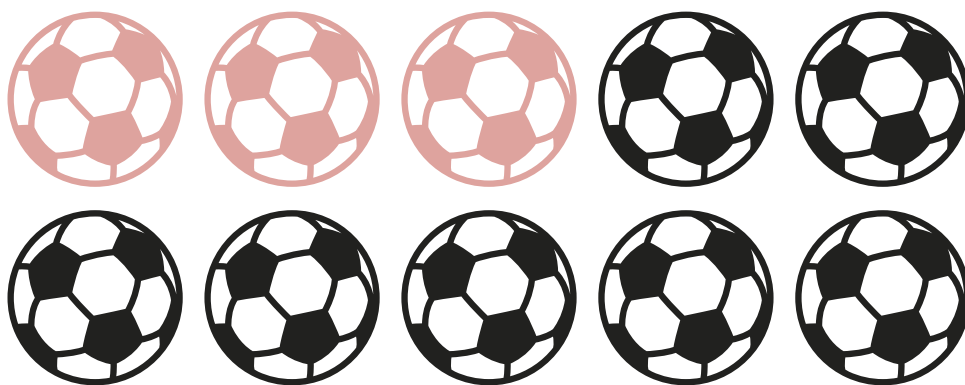
THE INFRASTRUCTURE OF RECREATIONAL SPORT IN CANADA IS CRUMBLING



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THE FINDINGS

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are temporarily/indefinitely closed.

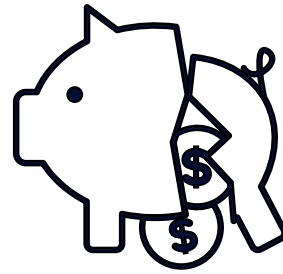
Another 6 in 10 are attempting to run modified programming.

About 1 in 3 sport organizations **are bankrupt or facing bankruptcy.**

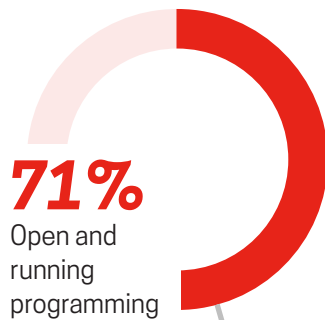
Those with smaller operating budgets are most at risk as are those operating in Northern and Atlantic Canada.



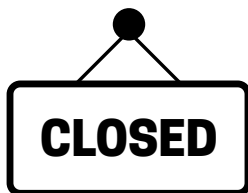
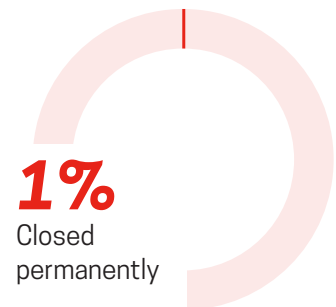
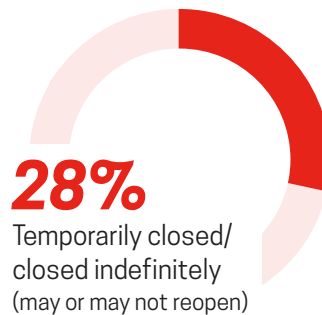
Financial losses account for half of the average operating budget.



Current state of sport organizations:



64%
Open and running with modifications



If current conditions do not change, almost 1 in 5 organizations (18%) believe they will need to permanently close within 6 months.

“Grant funding has either decreased substantially or disappeared entirely. These funding programs were the difference for us in the past, and without them moving forward we will struggle to exist. The mental health of our membership will be substantially affected if our organization ceases to exist.” –Survey Respondent

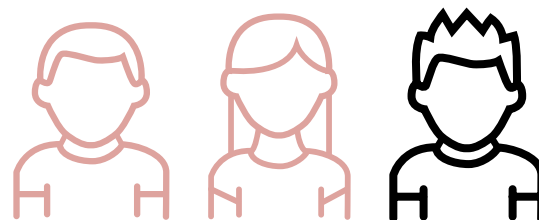
THE IMPACT ON CANADIAN YOUTH IS SEVERE



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THE FINDINGS

Two-thirds of parents of children aged 4 to 17 say that the COVID-19 pandemic has had a strong impact on their kids' participation in sports or recreational play. This sentiment is even stronger among those with kids 4 to 12.



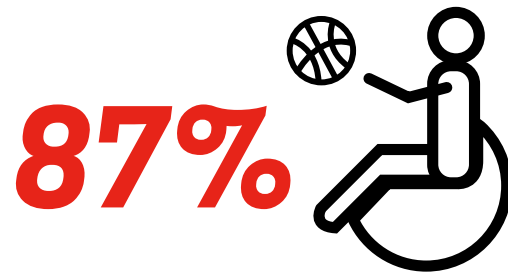
“As a school, we are struggling to engage our students in sports and activities due to the limitations of COVID. Very few of our students have access to outdoor play, parks, etc. near their homes. They are limited to their apartments. We are very worried about their physical and mental health.” –Survey Respondent



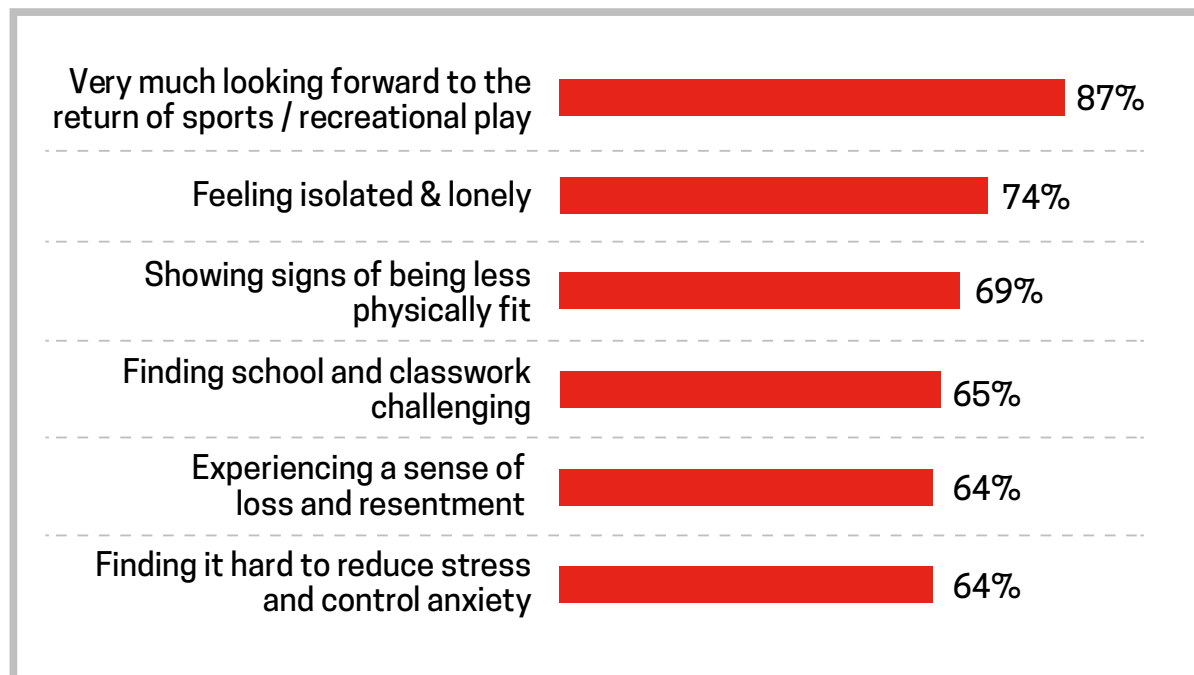
The COVID-19 pandemic has had a severe impact on Canadian kids. A majority of parents say that due to the pandemic their kids are feeling isolated and lonely, finding it hard to reduce stress and anxiety and showing signs of being less physically fit.

“Most small sports clubs struggle with basic operational costs like coaching fees and facility rentals. These costs are becoming prohibitively expensive. If this cost is passed on to participants, enrolment will plummet.” –Survey Respondent

87% of sport organizations are particularly concerned about individuals with already low access to sport.



Due to the challenges of the past year, parents say their kids are:



“As we shift to a virtual e-sport norm, I fear for our youth. The physical literacy skills of our youth are on a steady decline. As it does, we have moved from a “free play” model to a more structured and scientific approach to teaching these skills which is shown to be less effective. We are failing our youth. I fear for the future of sport in the current climate.” –Survey Respondent

“While we try to exercise over Zoom with them, kids keep quitting with the reduced amount of “fun” we can offer. I see serious declines in self-motivation and self-esteem, weight gain, muscle loss, and trouble regulating emotions and handling stress. Each month that this continues we lose a handful more children from organized sport in our club alone.” –Survey Respondent



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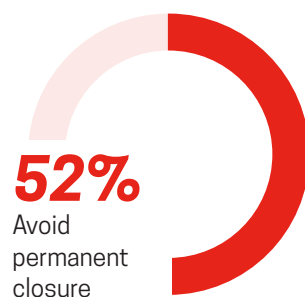
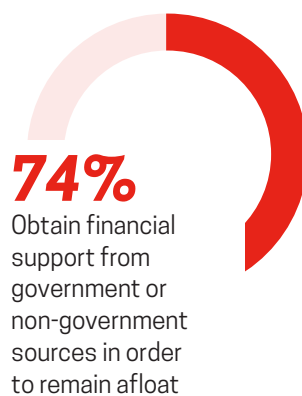
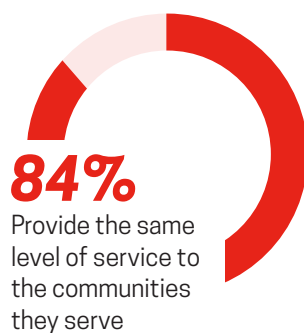
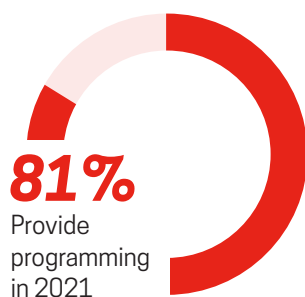
- More than three-quarters of all organizations (78%) believe that it will take more than six months for the recreational sport sector to return to a pre-COVID state.
- More than half of all sport organizations (52%) believe it will take more than a year.

“As one coach here put it, if kids are not continuing to do sport regularly, they are going to get out of it altogether. These years (junior high and especially high school) are critical to keeping kids in sport.” –Survey Respondent

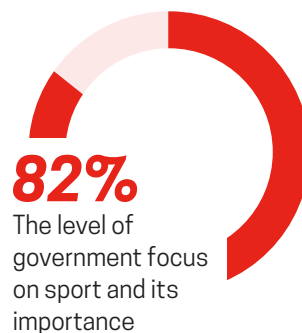
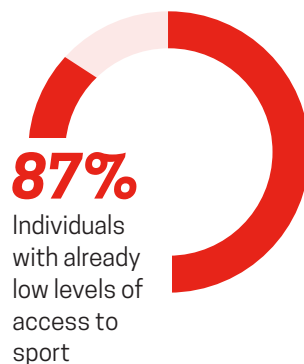




Among those not permanently closed, sport organizations have significant concern over their ability to:



All sport organizations have expressed significant concern for:



JUMPSTART'S SPORT RELIEF FUND

Building Back Sport & Play for All Kids

Jumpstart's Sport Relief Fund was originally launched in September 2020 as an \$8 million fund dedicated to helping sport and recreation organizations continue to operate. It provided support based on need in the form of grants covering programming and operational gaps exposed by the COVID-19 pandemic to enable safe sport and play across the country.

The Vital Signs Sport & Belonging report calls on the importance of being intentional about promoting sport's ability to foster inclusion and belonging and not leave it to chance¹. Through consultation with community partners and key stakeholders, we learned that return to play plans have given little consideration to the systemic barriers to sport and play for many in Jumpstart's communities: children with disabilities², girls and young women³, Indigenous children and youth, Black youth and families in financial need.

In building Jumpstart's Sport Relief Fund we were presented with an opportunity to strike a balance between recovery and renewal, allowing us to aggressively address the systemic barriers to sport participation for Canadian children and youth of all abilities and backgrounds. Grant applications for the initial Sport Relief Fund were scored based on quality and assessed against a 5-point Equity, Diversity & Inclusion score⁴.

Nearly 700 organizations were ultimately provided grants through Jumpstart's Sport Relief Fund⁴, impacting over 70,000 kids from coast-to-coast-to-coast. In addition to overcoming financial barriers to participation:

- 23% of funded applications addressed equity, diversity and inclusion for Black children and youth and 33% for Indigenous children and youth.
- 39% of funded applications addressed equity, diversity and inclusion for children/youth with disabilities.
- 30% addressed equity, diversity and inclusion for girls/young women and 4% for sexual minorities.

¹ Vital Signs Sport & Belonging, Community Foundations of Canada, 2015

² COVID-19 Disability Survey, Abilities Centre & Canadian Disability Participation Project, 2021

³ Canadian Women & Sport, The Rally Report, June 2020

⁴ Jumpstart EDI (Sabiston), results from applicants of Jumpstart Sport Relief Fund

KEY INSIGHTS FROM SPORT RELIEF

The results from the first two sections of this report, along with the first round of applications received in response to the Sport Relief Fund, resulted in a number of key insights:

- Organizations who have been able to continue operating are bearing increased financial costs due to the requirements of purchasing PPE and sanitization/cleaning; and organizations that have not been able to operate have seen a drastic reduction in revenues from program registrations and associated fees.
- Knowing that the pandemic and the associated impacts are also being keenly felt by their constituents, many sport organizations are offering price reductions where possible to ensure that their programming remains accessible.
- Many recipients of Sport Relief Fund support are leveraging their grants to increase participant capacity so that they can be ready to provide more Canadians with the opportunity to participate in physical activity programs when safe to do so. While this is a positive outcome for sport participation, it comes at the cost of organizations addressing their near-term financial concerns.
- Sport participation and physical activity organizations are facing both a supply and demand shock, where they are unable to supply normal programming due to financial and/or public health constraints and are also losing participants due to financial and/or health concerns.





An estimate from this research suggests that if community sport organizations do not resume normal operations within six months, they could lose their capacity to provide programs for up to approximately 2.2 million participants⁵. Given this overwhelming need, Canadian Tire Corporation (“CTC”) committed an additional \$12 million to the Sport Relief Fund in February 2021. This will allow Jumpstart to disburse much needed additional financial support to sport organizations to help build back sport and play throughout 2021. Our goal is to reach as many organizations as possible while creating the most impact.

As we emerge from these challenging times, return to play will be more important than ever. While we recognize that the Sport Relief Fund alone will not solve the complex issues and challenges facing the sport community and the youth they serve, Jumpstart is proud to embrace its role in building back sport and play and ensuring continued opportunities for kids across the country. We hope that you will join us.

⁵ Based on CFLRI percentages of participants per age group, we estimate approximately 12.7 million Canadians are sport participants. Assuming that every organization represents an equal share of that capacity, a loss of 18% of organizations results in a loss of 2.2 million participants worth of capacity.

METHODOLOGY

To gauge the impact of the COVID-19 pandemic on the recreational sport sector, Jumpstart commissioned Ipsos to conduct two surveys:

Among parents of children aged 4 to 17 to understand the mental and physical impact on children/youth due to loss of access to sport and play (Ipsos Omnibus*)

- Sample size, n=1000
- Length of interview, 5 mins
- Fieldwork dates, Jan 26 - 28, 2021

Among sport organizations** to understand the pandemic's impact on programming, as well as organizations' ability to continue operating during the crisis

- Sample size, n=1102
- Length of interview, 8 mins
- Fieldwork dates, Jan 27 - Feb 1, 2021

*Conducted using the Ipsos Omnibus. Survey data are weighted by age, gender and region to represent the demographic profile of the Canadian population.

**The sample was provided by CTC and included 389 registered charities, 574 non-profit organization and 139 other organizations, representing municipal parks and recreation organizations (n = 247), multi-sport facilities (n = 214), sport organizations/clubs/associations (n = 422), provincial sport organizations (n = 143), national sport organizations (n = 44) and other organizations (n = 199). While the exact universe of sport organizations is unknown, we believe this sample captures the breadth and depth of the sport ecosystem in Canada.



ABOUT CANADIAN TIRE JUMPSTART CHARITIES

Canadian Tire Jumpstart Charities is a national charity committed to ensuring kids in need have equal access to sport and recreation. With an extensive, national network of more than 1,000 grantees and 289 local chapters, Jumpstart helps eligible families cover the costs of registration, transportation, and equipment, and provides funding to selected organizations for recreational infrastructure and programming. Supported by the Canadian Tire Family of Companies, Jumpstart has provided more than two million opportunities for Canadian kids to get in the game since 2005. For more information, visit jumpstart.canadiantire.ca.

Follow Jumpstart on [Twitter](#), [Instagram](#) and [Facebook](#) to learn about how the charity is giving kids across Canada a sporting chance.

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