SEPTEMBER 2025

VICSPORT

OUR 2025 MEMBER SURVEY REPORT

THE STATE OF SPORT

Table Of Contents

Cover Image supplied by Canva
@cputnam03

The State of Play

WELCOME TO OUR FIRST STATE OF SPORT REPORT

Our annual survey of Vicsport member organisations provides us with insights into what's on the minds of our industry leaders.

The *survey received over 50 responses from representatives of member organisations providing a sufficient industry sample from which we can take some directional insights.*

- **Confidence is high — but not universal.** The overall average rating from respondents was 8.2 out of 10, but there's a notable gap between those classed as 'Extra Large Organisations' (9.8/10) and our 'Small Organisations' (7.9/10)[1].

- **Facilities and volunteer capacity are the biggest brakes on progress.** Even our larger member organisations flagged them as persistent constraints.
- **Workforce sustainability is on everyone's radar.** Compliance burdens, internal systems and governance capability present challenges, and the volunteer pipeline is consistently noted as under pressure.
- **Financial positions are generally solid… for most.** The majority reported a stable forecast for the next 12 months, but there's caution for many in 2025/26.
- **Participation is stable, but is high on the list of challenges to address.**

Why this survey matters?
For SSAs, LGAs, and clubs, these insights point to where sector-wide coordination can have the biggest impact.

Key issues have become time critical. Strengthening infrastructure and volunteer systems, scaling new participation-retention strategies, and the adoption of technology has become imperative.

1. Refer to Vicsport Organisational Memberships

Our Industry Sentiment & Outlook

8.19/10

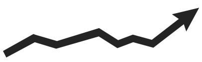
Confidence in our own organisations is strong

The average outlook across all respondents for their own organisations is high, generally signaling resilience and optimism, however there are lower levels of confidence in our smaller organisations, compared to the larger organisations.

7.54/10

Confidence for the industry is optimistic

On average, there is a less confident outlook from our survey respondents for the overall outlook of the Victorian sport and active recreation sector.



The participation outlook is positive - but needs to be a focus

Most expect participation to grow or hold steady in the next 12 months, but stated 'expanding participation' and 'improving participant and member experiences' as their top opportunities.

The financial outlook is stable, with caution

The status of organisations financial outlook is generally considered to be stable, however some issues were flagged, as 1 in 4 reported a deficit in the last 12 months.

Facilities are causing some concerns

Almost half of respondents anticipate facility quality or access to be a significant challenge, with facility development or upgrades being a critical focus.

Our greatest concerns are for volunteer and staff capacities

The outlook for our most important resources are less optimistic - with over 54% of respondents stating volunteer shortages, and 41% citing compliance burdens as the biggest challenge for their organisation.

Where are the opportunities?

The signposts: The responses tell us that getting more people involved as participants, members and volunteers, along with facilities and revenue growth are the keys to success.

#1 Participation & Experiences

'Expanding participation' was ranked as the number one opportunity by 59% of respondents, closely followed by *'improving participant and member experiences'* (52%), with '*inclusion and equity strategies*' (28%) featuring highly.

#2 Facilities

37% of respondents stated *'Facility development or upgrades*' as another main opportunity.

#3 Volunteers

The importance of volunteers was recognised with more than 1 in every 3 respondents stating that *'volunteer recruitment and retention'* was a top priority.

#4 Revenue

Also unsurprisingly, given some of the industry challenges identified in the survey, *'commercial revenue growth'* featured highly for over a quarter of respondents.

Where we are concerned

The signals: There are some warning signs, and the issues are already becoming chronic for some. Without intervention, these trends could severely damage the future of community sport.

#1 Volunteer and Workforce capacity

The most frequently cited challenge - *'volunteer shortages'* was called out by 54% - along with 41% stating *'compliance burdens*' - which highlights the high expectations on our critical resources.

#2 Facilities

'Facility access or quality' was noted by over 40% of respondents, underlining a key challenge that is being recognised as a opportunity for development.

#3 Finances

The high reliance on a small number of revenue sources, may have resulted in *'financial sustainability'* being called out by over 25% of respondents.

#4 Participation inclusion & retention

‘*Inclusion and engagement of under-represented groups’* (23%), along with overall '*participation retention'* (21%) rounded out the top challenges identified in the survey.

Where We Are Different

The call outs: As an industry we share many challenges and opportunities, however we also have our differences. Relevance is always important to understand, to help guide our decisions.

Different organisations have different outlooks.

Our respondents from member organisation classified as ‘Extra Large’ rate their confidence in their own organisations at 9.8/10 (and ‘Large’ at 8.7/10) which is a *notably more confident outlook* than our ‘Small’ member organisation respondents stating 7.9/1*0.*

Different planning

Respondents from our ‘Extra Large’ organisations stated they had all updated their strategic plans in the past two years, however *only 41%* of ‘Small’ organisations have done so.

Different confidence in different locations

Respondents from our ‘Regional’ based member organisations reported confidence levels of 8/10 on average, slightly less than the overall response average from ‘Metro’ and ‘State Wide’ organisations - who reported 8.3/10.

Different forecasts

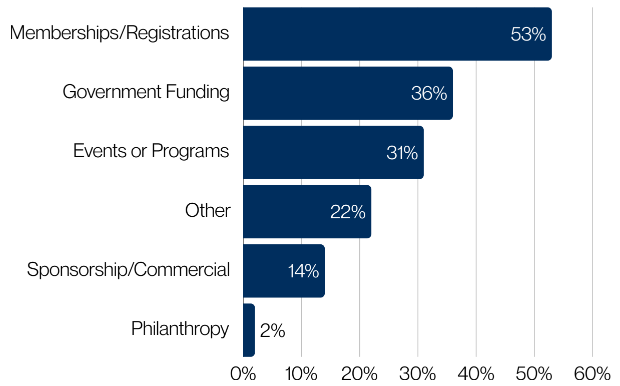
Several of our ‘Medium’, ‘Small’ and ‘Associate’ member organisations *reported a financial deficit,* however none of the ‘Extra Large’ or ‘Large’ organisations reported the same results.

THE FINANCE & HUMAN RESOURCE CHALLENGES

Responses to our industry survey highlighted some key trends to keep an eye on.

Revenue Sources

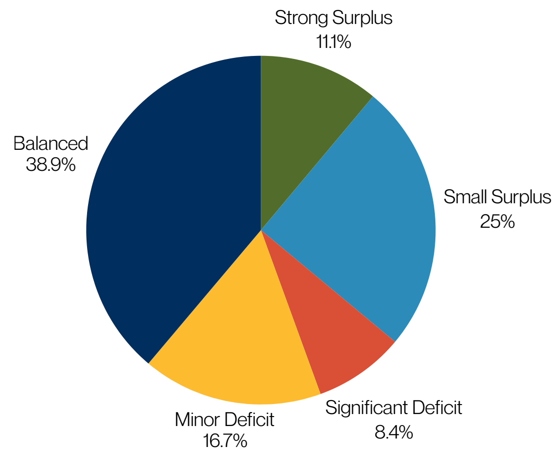
The revenue sources which account for more than 25% of an organisations income:



There is a high reliance on a small number of revenue streams, with 61% stated *diversifying revenue streams* is key to financial sustainability.

Forecast Financial Position

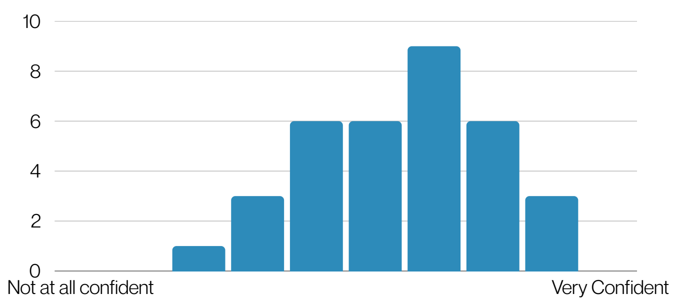
Over a quarter of respondents reported a deficit.



72% of respondents indicated *developing commercial partnerships and sponsorship* would strengthen their organisations financial sustainability.

Volunteer Resources

47% stated 'Volunteers' is the biggest gap in workforce capability and our survey reveals mixed confidence in our 'organisations ability to recruit and retain volunteers'.



Guidance is needed - and we are here to help at Vicsport.

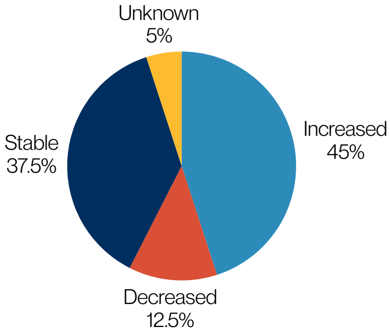
Professional development needs

The top six areas of support our respondents are seeking for professional development or support that would most benefit their teams were:

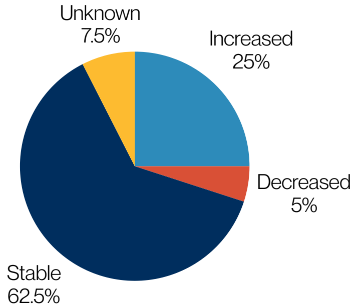
PARTICIPATION, RESEARCH & INNOVATION PRIORITIES

Responses from our members call out some key challenges and opportunities.

Participation & Retention

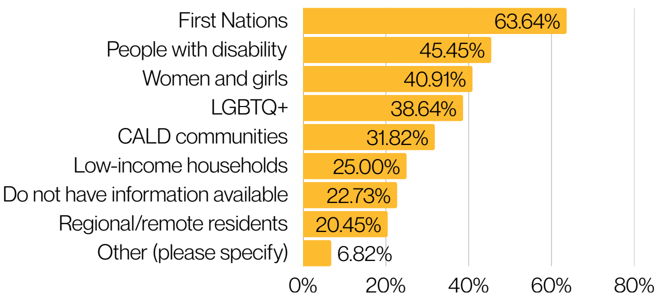


Participation levels in the past 12 months



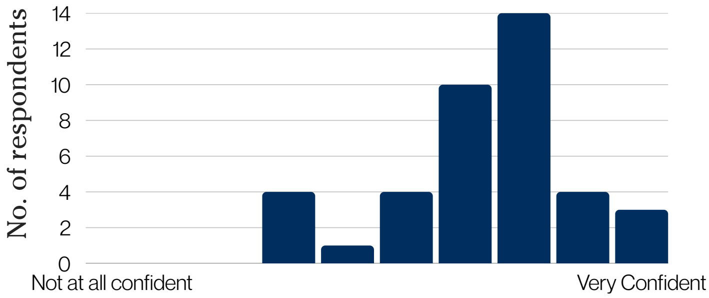
Retention levels in the past 12 months

Under representation



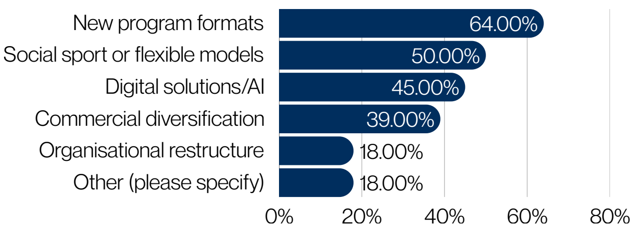
Several participant groups are reported as currently under-represented in respondents programs or sports, highlighting areas of focus for the future.

Quality of Experiences



Some organisations are confident they are providing quality experiences, however given the importance in attracting and retaining participants, this is an area to improve upon.

Research and Innovation



New program formats and *social sport or flexible models* are the clear priority, along with *digital solutions/AI and commercial diversificaton* being the top 4 areas of 'innovation or reform' respondents were actively exploring.

What areas of research would be most valuable for the Victorian sport sector to pursue in the next 2 years?

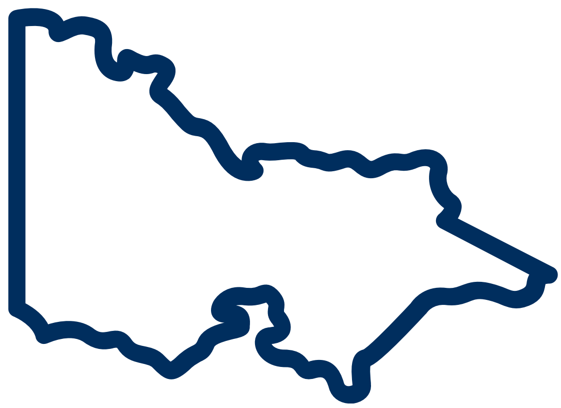
- Workforce Trends
- The Value of Sport
- Club viability and sustainability factors
- Emerging governance & compliance challenges
- Participant experience and satisfaction
- Youth participation trends and transition points
- Effective models for share servcies & cross-sport collaboration


Image supplied by Canva

THE REPORT ON VICSPORT

Responses to our member survey highlighted key actions for Vicsport to act on.

Our Membership



MEMBER SATISFACTION = 7.75/10

Our relationships are strong, and we will build on these connections.

The Issues to address

Our survey asked about the key issues that matter for our respondents that Vicsport could focus on. The top themes were:

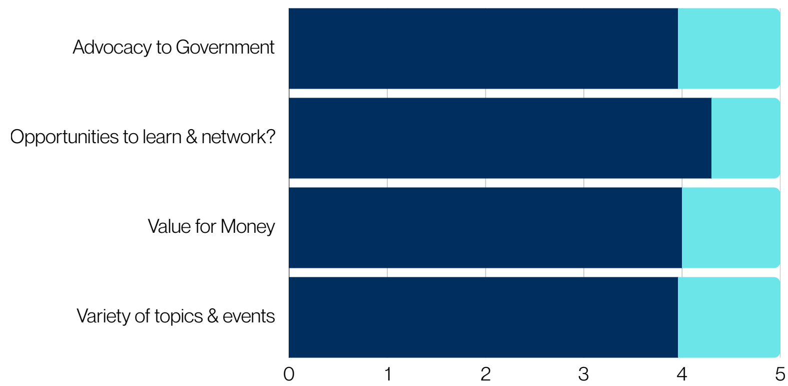
- Funding & Advocacy
- Volunteers & Workforce
- Facilities & Access
- Governance & Compliance
- Inclusion & Participation

The key issues our respondents want Vicsport to advocate to government and other agencies are:

- Funding reform and fairness
- Infrastructure and facility access
- Volunteer and compliance relief

Our Performance

Average rating by respondents out of 5.



Our performance in serving the industry appears strong, however we always strive to improve.

Our Service offerings

How likely are you to engage with Vicsport for the following?

We are here to help.

WHY DO WE MATTER?

THE VALUE OF SPORT

The vast contribution of sport is a belief held by many, and the case is continually building. But the story still needs to be told, with the evidence to back it up.

"If we didn't have sport and recreation, we'd be spending billions to create it."

- Jason Hellwig
Chair, Vicsport

The Recognition

97% of Australian adults believe sport is good for their health & wellbeing[1].

The Scale & Relevance

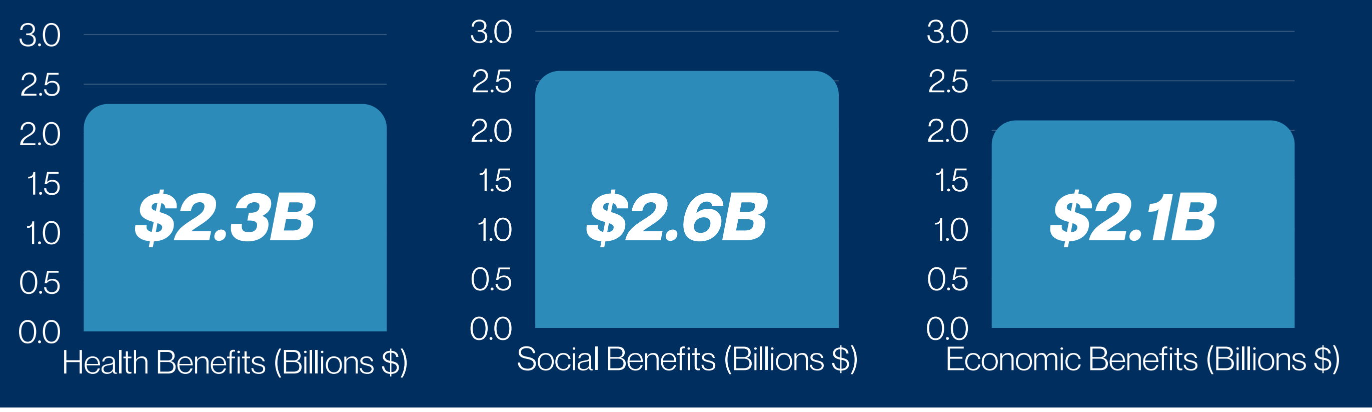
85.4% of Victorian adults participate in community sport and active recreation[2].

The vast majority of Victorian adults, and children are active in sport and recreation in some form. However, the percentage that are involved in 'organised sport', is being challenged.

Maintaining our role in the provision of sport will ensure we remain central to the value that sport and recreation provides.

Sport is being asked to provide a lot, and it delivers a great deal of positive impact.

The 2021 report by KPMG into the *Value of Community Sport and Active Recreation Infrastructure*[3] revealed community sport and active recreation delivers $2.6 billion in social benefits annually in Victoria.



The report also revealed community sport and active recreation delivers (at least) an estimated $2.3 billion in health benefits on an annual basis, and (at least) $2.1 billion in economic benefits.

The research continues to evolve, and we have opportunities to prove the value of sport in Victoria. If you are interested in contributing or exploring this further, please contact our Vicsport team.

1. 'Community Perceptions Monitor Annual Report 2022-23', Australian Sports Commission, 2023
2. Community sport and active recreation in Victoria, Parliament of Victoria, 2025
3. Value of Community Sport and Active Recreation Infrastructure, KPMG, 2021

VICSPORT

Vicsport's vision for Victorian sport is a thriving Victorian sports industry, which is well resourced, well governed, innovative and inclusive.

We will support our members to be the best they can be by connecting, informing, supporting and enabling sporting organisations to provide opportunities for sport to play a role in the lives of all Victorians.

FOR
MORE
INFORMATION

WWW.VICSPORT.COM.AU