



# Tennis NSW Pulse Survey

July 2020



# Background

Throughout June 2020 we set out to capture sentiment from our tennis community to understand how they have been impacted by COVID-19. Furthermore, we sought to gain insight on how effective our own efforts were in supporting our stakeholders and ensuring that they were well informed.

The survey was structured into three sections:

- Club operations and the impact of COVID-19
- Leadership and support from Tennis NSW
- Communication from Tennis NSW

This survey was promoted through our Facebook and LinkedIn channels and it was sent via direct mail to our COVID-19 mailing list which includes clubs, coaches, councils, tournament directors, Sydney Badge delegates, Life Members and country delegates.

# Executive Summary

- 257 responses to the survey – 73% from Club Committee representatives
- Many clubs have suffered financially although many state it is still too soon to tell
- 53% have seen an casual court hire increase – 19% saying it has been 'significant'
- 85% have a COVID Safe Plan for their club
- 57% have been impacted in their ability to host tournaments
- 71% have not received financial support from their Local Council
- 65% have not provided financial relief to their Coaches
- Positive sentiment towards Tennis NSW for resources, comms, staff knowledge

# Who participated in this survey?

There was a total of 257 respondents to this survey.

73% - Club committee member

13% - Player

6% - Tennis coach

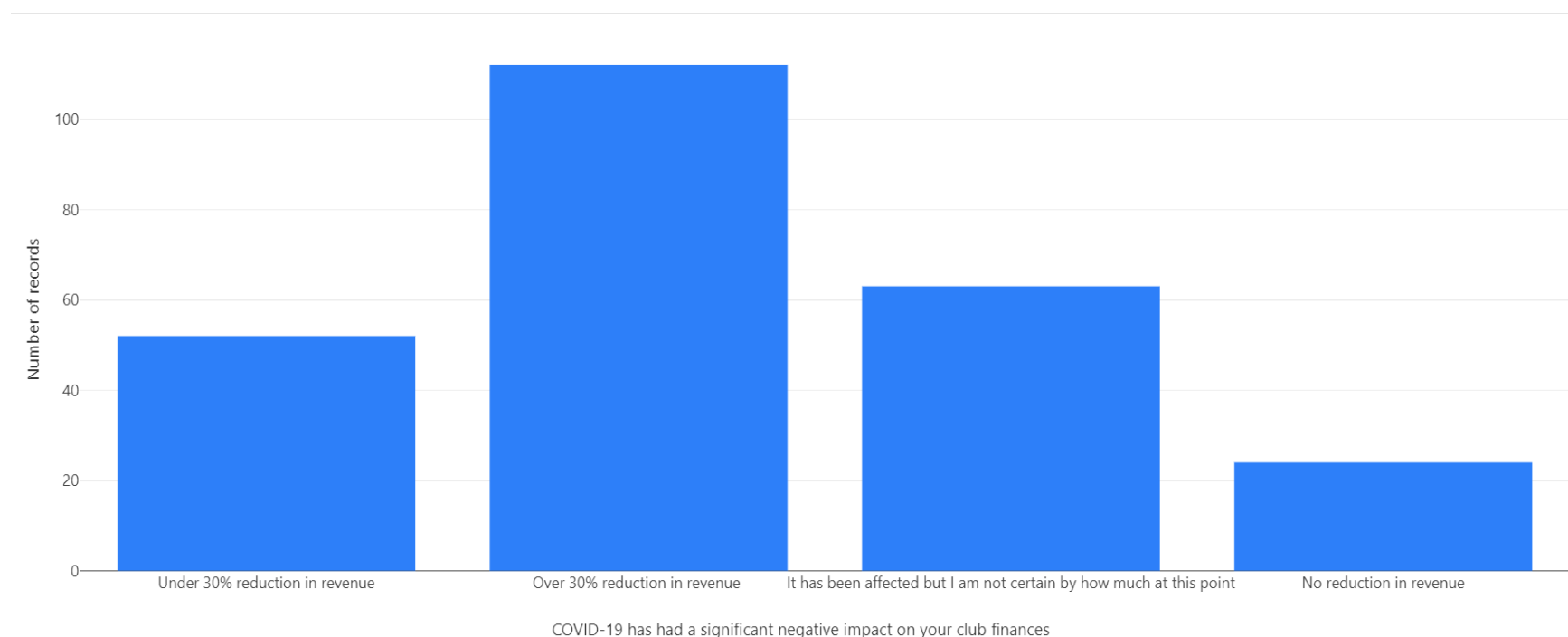
4% - Court operator

The remaining 4% is made up of respondents who selected multiple responses (e.g. Club committee member, player, court operator)

# What has been the impact of COVID-19 on revenue?

It is highlighted that a majority have been affected by **over 30% reduction in revenue**, with many also indicating that it is too soon to tell if they will be impacted financially by COVID-19.

When assessing the responses based on **only the responses of club committee members and court operators** the pattern of responses is unchanged so the chart above can be read as an accurate reflection of the audience it was intended for.



# How have club memberships been affected?

Membership numbers have been unaffected – 24%

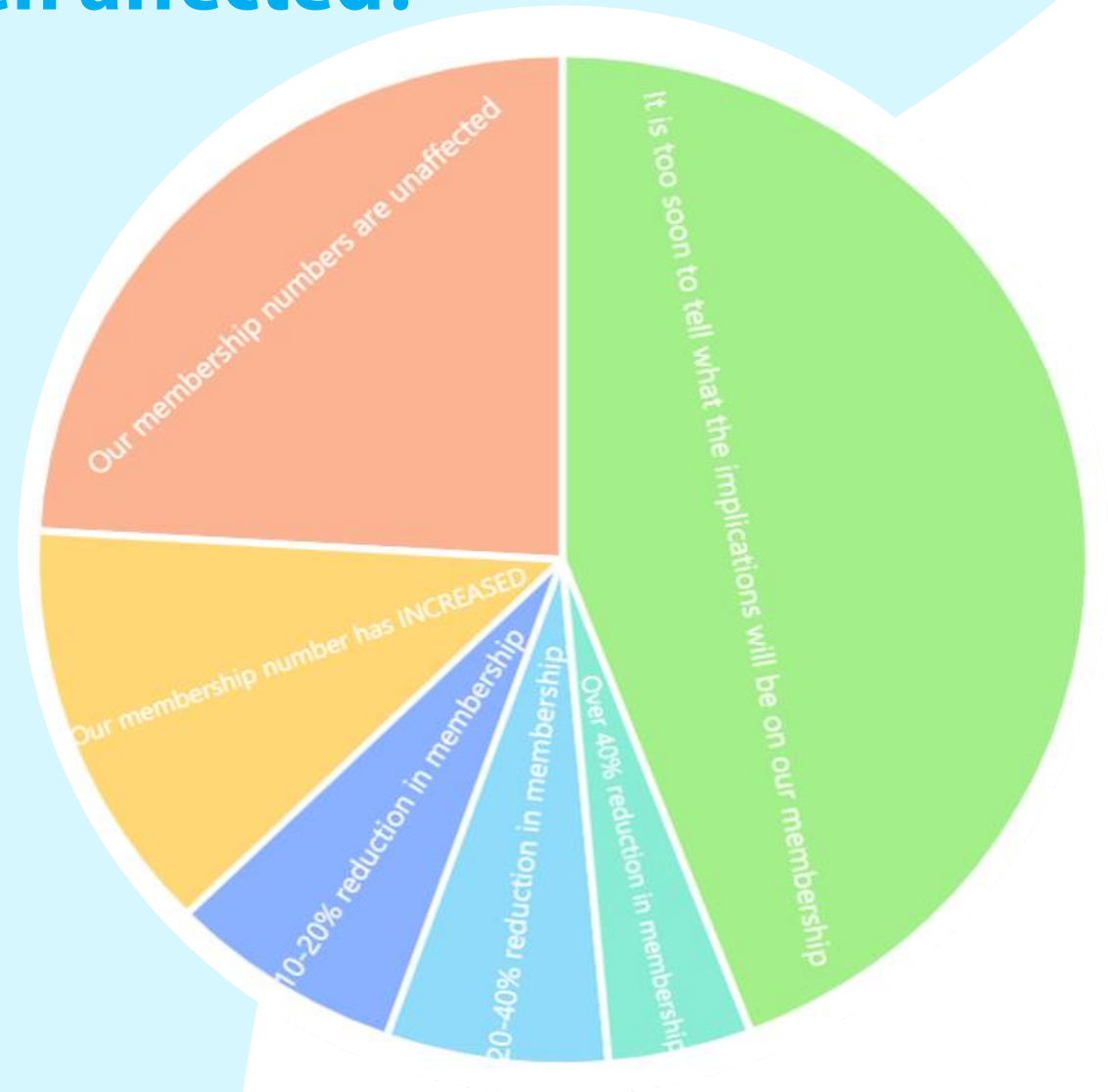
**It is too soon to tell – 44%**

Membership has increased – 13%

10-20% reduction in membership – 7%

20-40% reduction in membership – 6%

Over 40% reduction in membership – 5%



# How has casual court hire been affected?

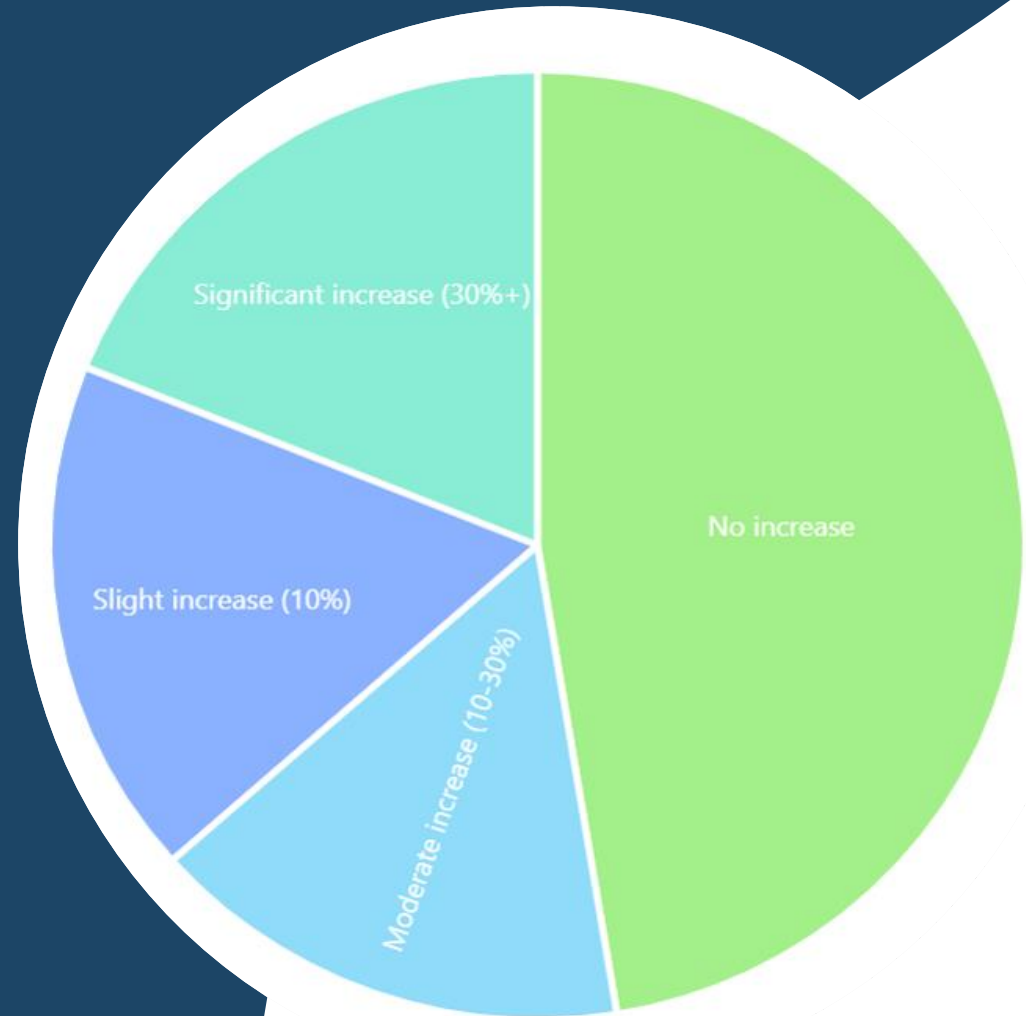
No increase in casual court hire – 47%

**Increase in casual court hire – 53%**

Slight increase – 18%

Moderate increase – 16%

Significant increase – 19%



# Implementing COVID-19 Safety Plans

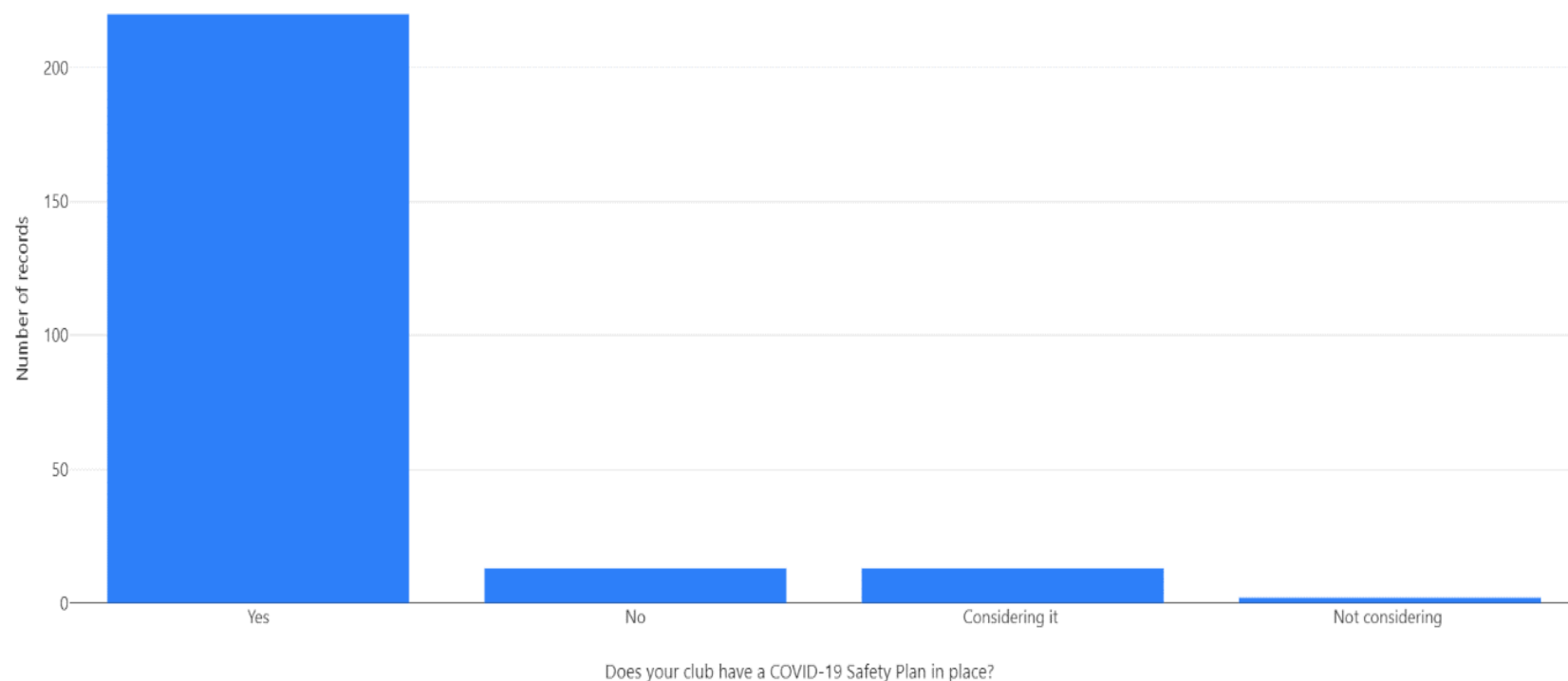
**220 out of 257 respondents indicated they have implemented a COVID-19 Safety Plan.**

Of those 13 who indicated they **did not have** a Safety Plan and identified their role:

3 were Club Committee Members

2 were Players

1 was a Coach





# Hosting tournaments

The impact on tournament hosting has proven to be significant as expected.

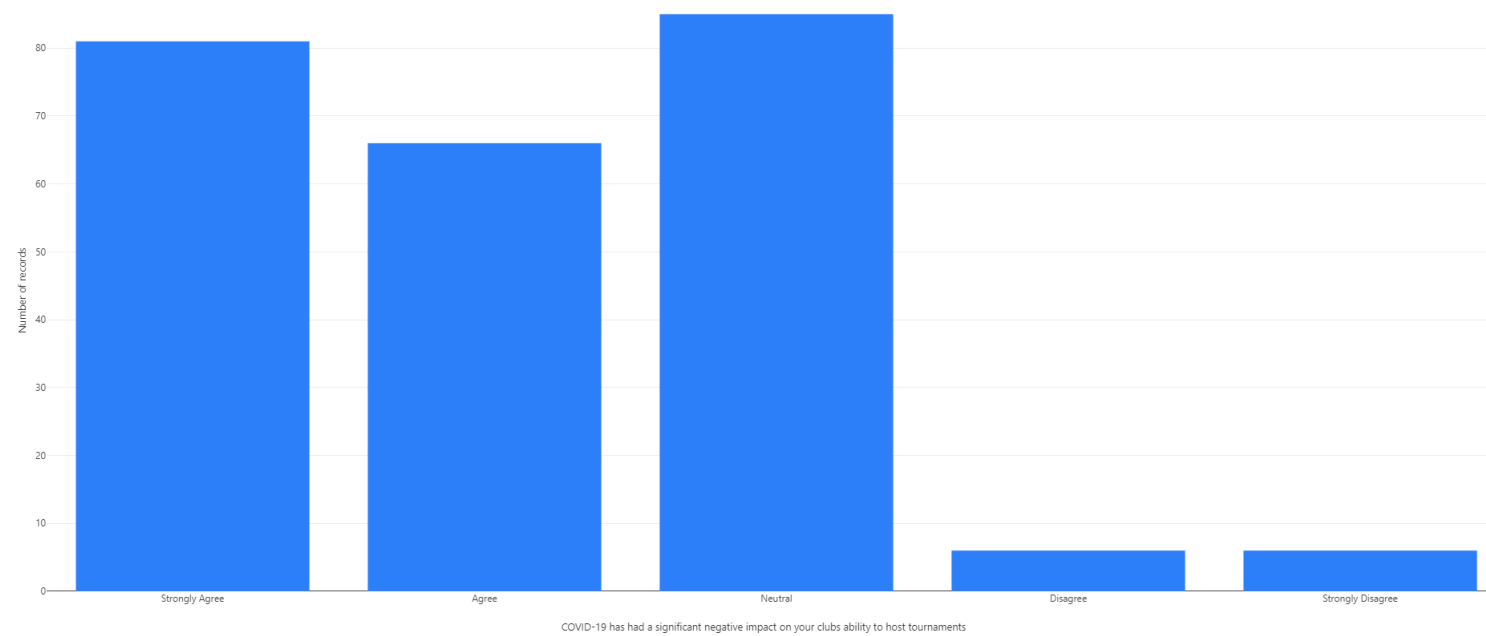
Strongly agree – 81 respondents

Agree – 66 respondents

**Neutral – 85 respondents**

Disagree – 6 respondents

**Strongly disagree – 6 respondents**



## Clubs providing financial relief to their coaches

- 30% have provided financial relief to coaches
- **65% said they were not providing relief**
- 5% considering providing financial relief.



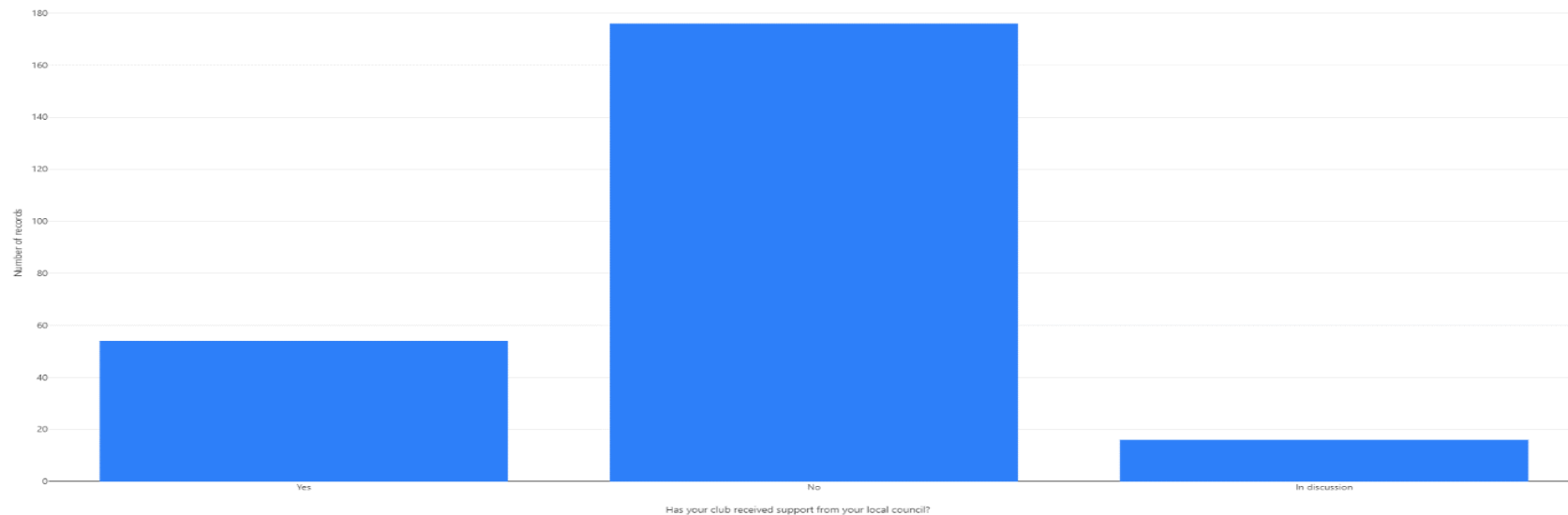
# Local Council support

**71% indicated that they have not received support from their local council**

22% said they had received support

6% are in discussion with local council

When looking at this for coach responses only, 50% of respondents indicated they had received relief or were in discussion. 40 respondents indicated they had been supported by JobKeeper, 2 have been supported by Payroll Tax Assistance.

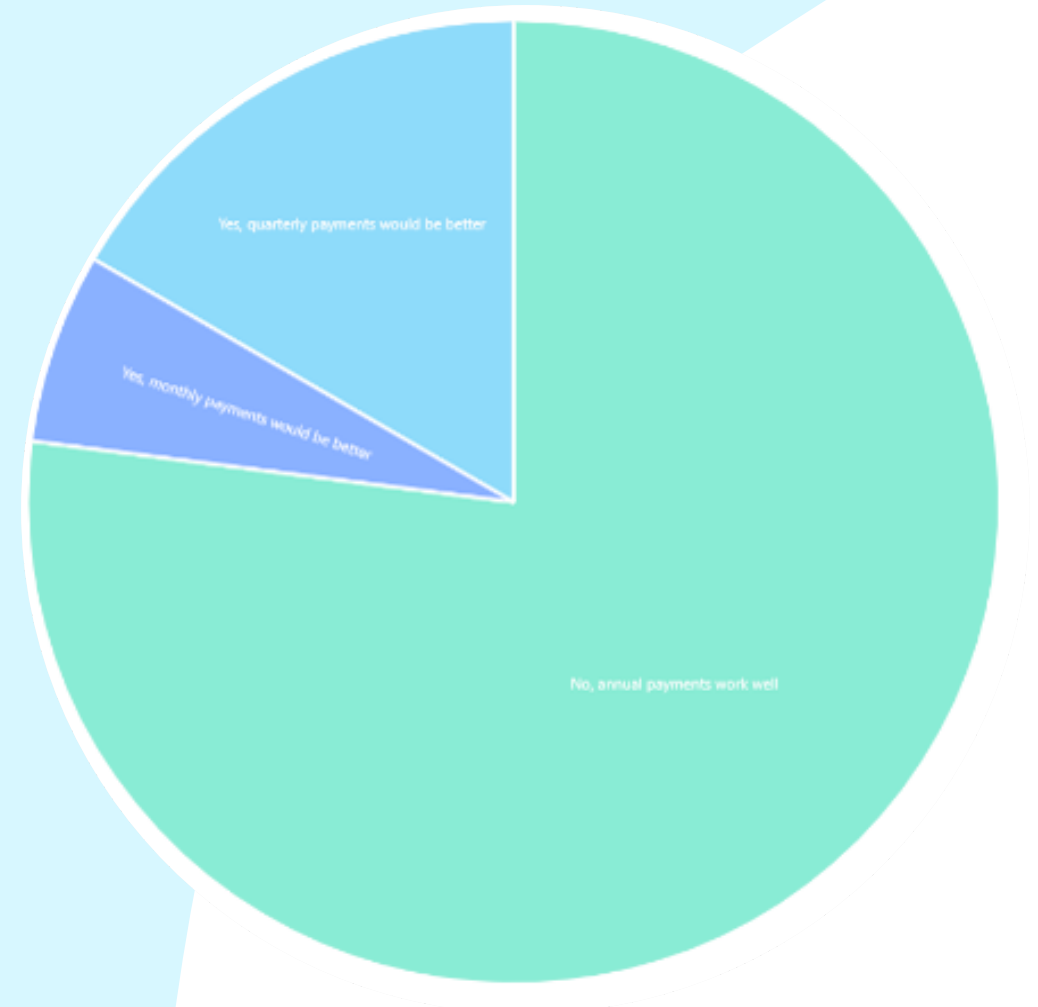


# Affiliation fee payment preferences

**77% - Annual payments to TNSW**

16% - Quarterly payments to TNSW

6% - Monthly payments TNSW



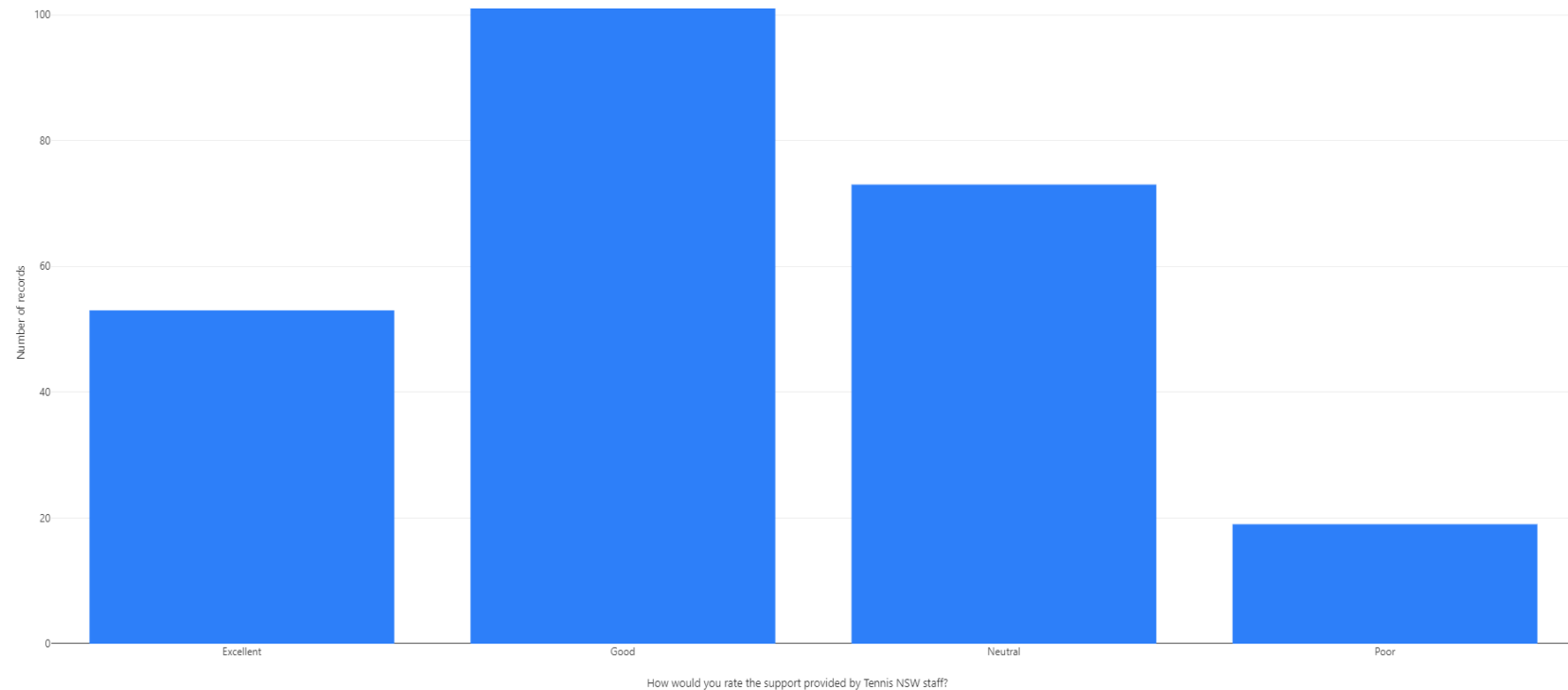
# Support provided by Tennis NSW

21% indicated the support by TNSW staff was 'Excellent'

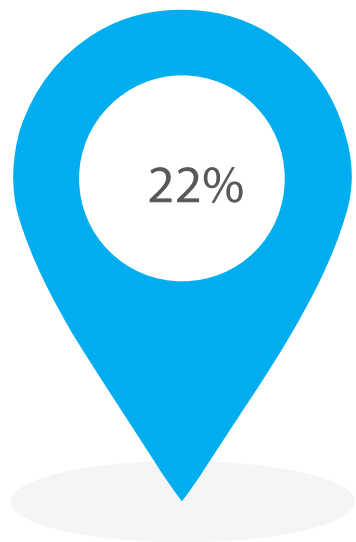
**42% described it as 'Good'**

30% said 'Neutral'

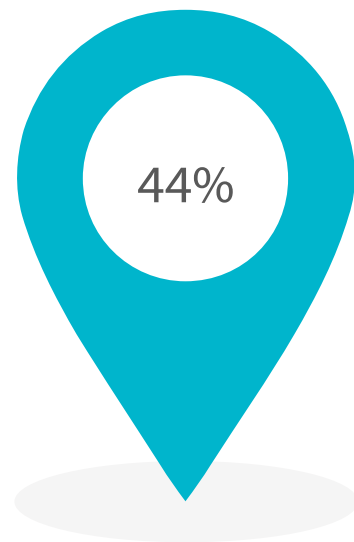
7% stated 'Poor'



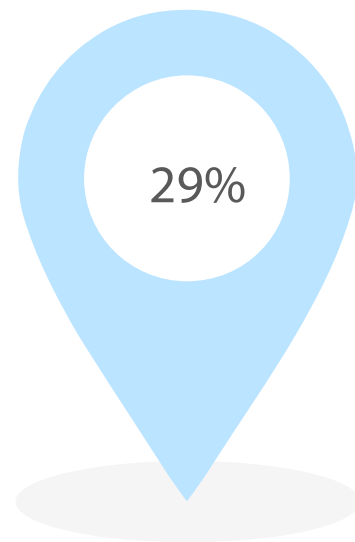
## Knowledge of Tennis NSW staff



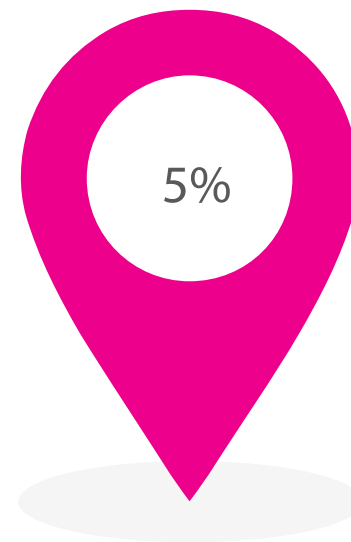
Excellent



Good



Neutral



Poor

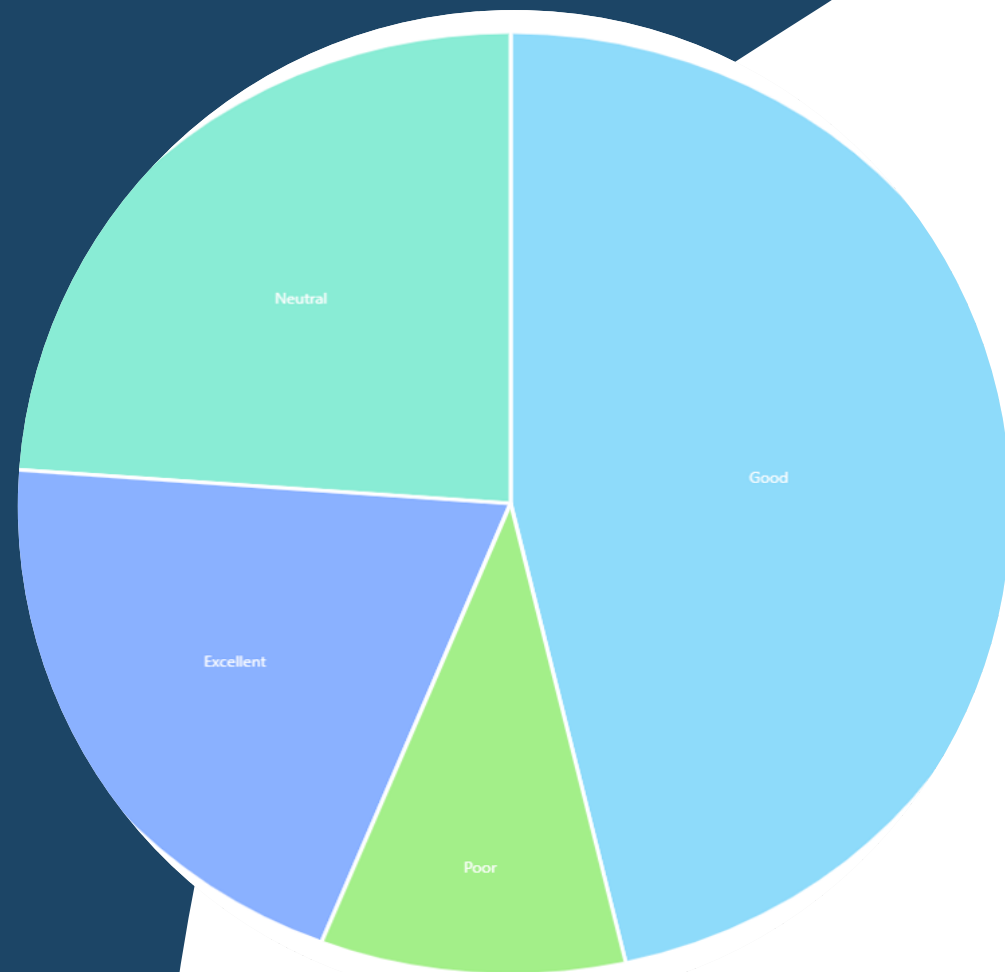
# Leadership of Tennis NSW

20% - Excellent

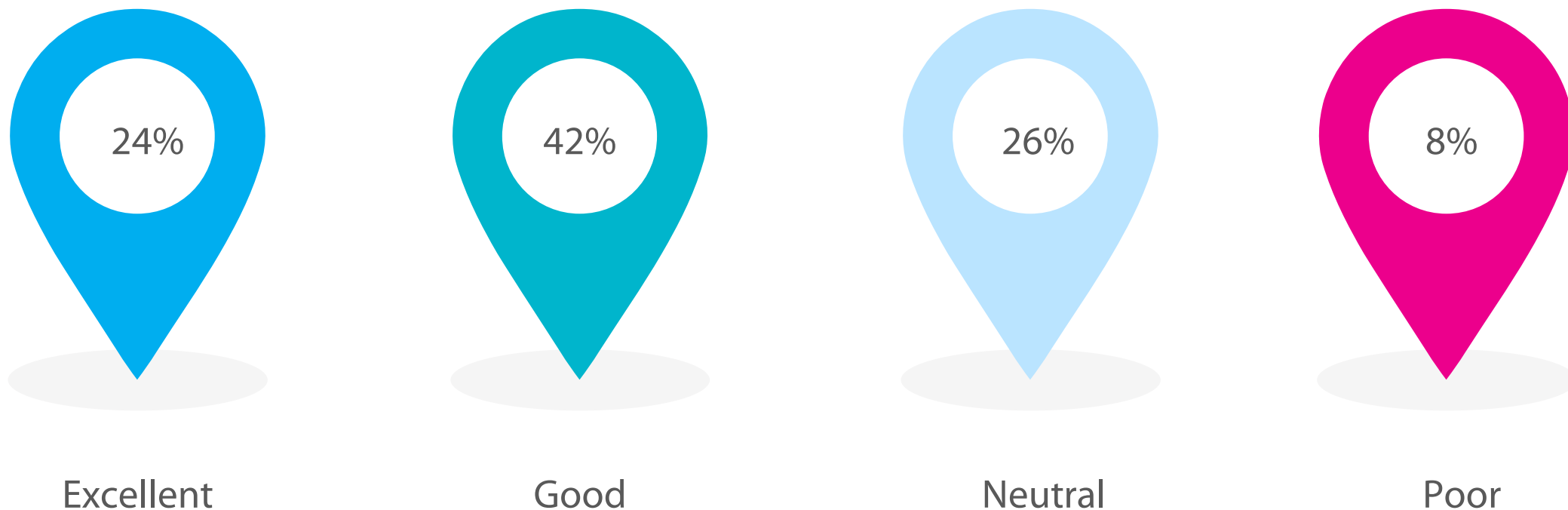
**46% - Good**

24% - Neutral

10% - Poor



## Resources provided by Tennis NSW



When segmenting Court Operators, 86% indicated the resources were 'Excellent' or 'Good'. Similarly, 75% of Coaches indicated that the resources were 'Excellent' or 'Good'.



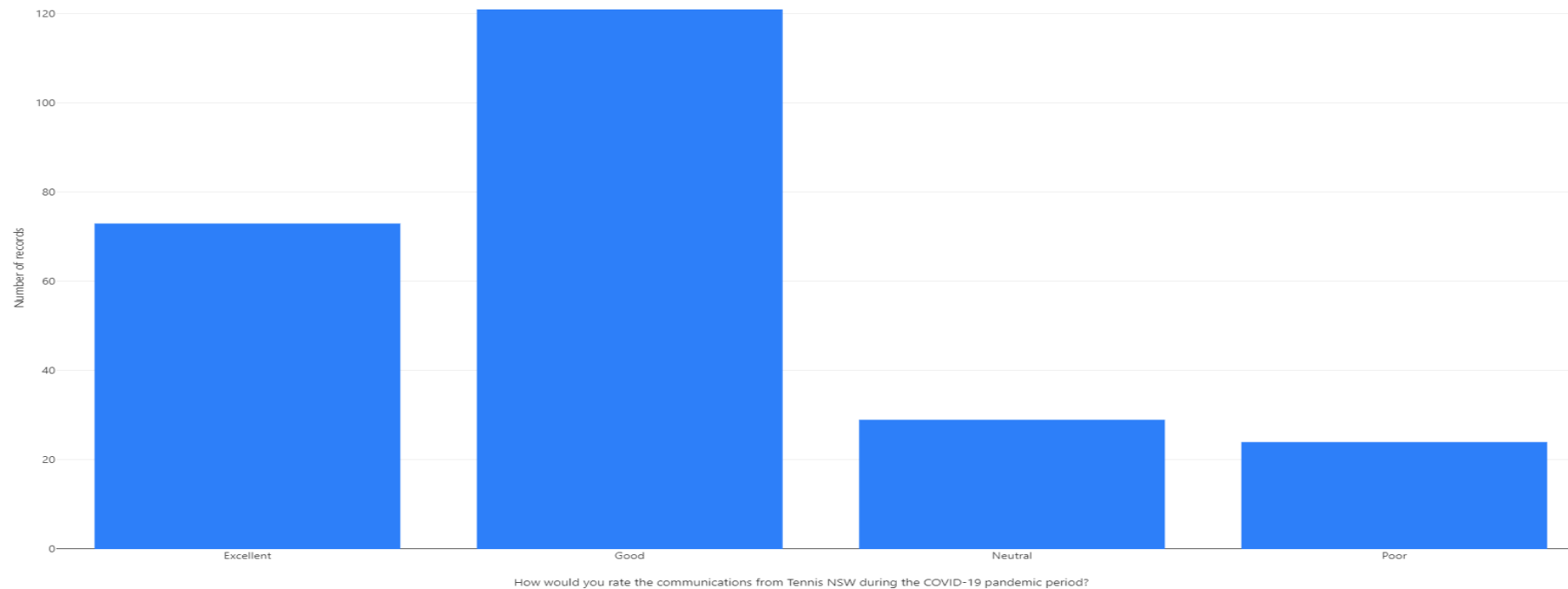
# Communication from Tennis NSW during COVID-19

30% - Excellent

**49% - Good**

12% - Neutral

10% - Poor





## Where are people obtaining their COVID-19 tennis related information from?

23% - TNSW website

**36% - Relying on direct email from TNSW**

17% - TNSW website & direct email

7% - TNSW Facebook

9% - All of the above

8% - None of the above



## Social media accounts followed

**55% - None**

31% - Facebook only

7% - Facebook & Instagram

3% - Facebook & Linked In

2% - Facebook & Twitter

2% - All

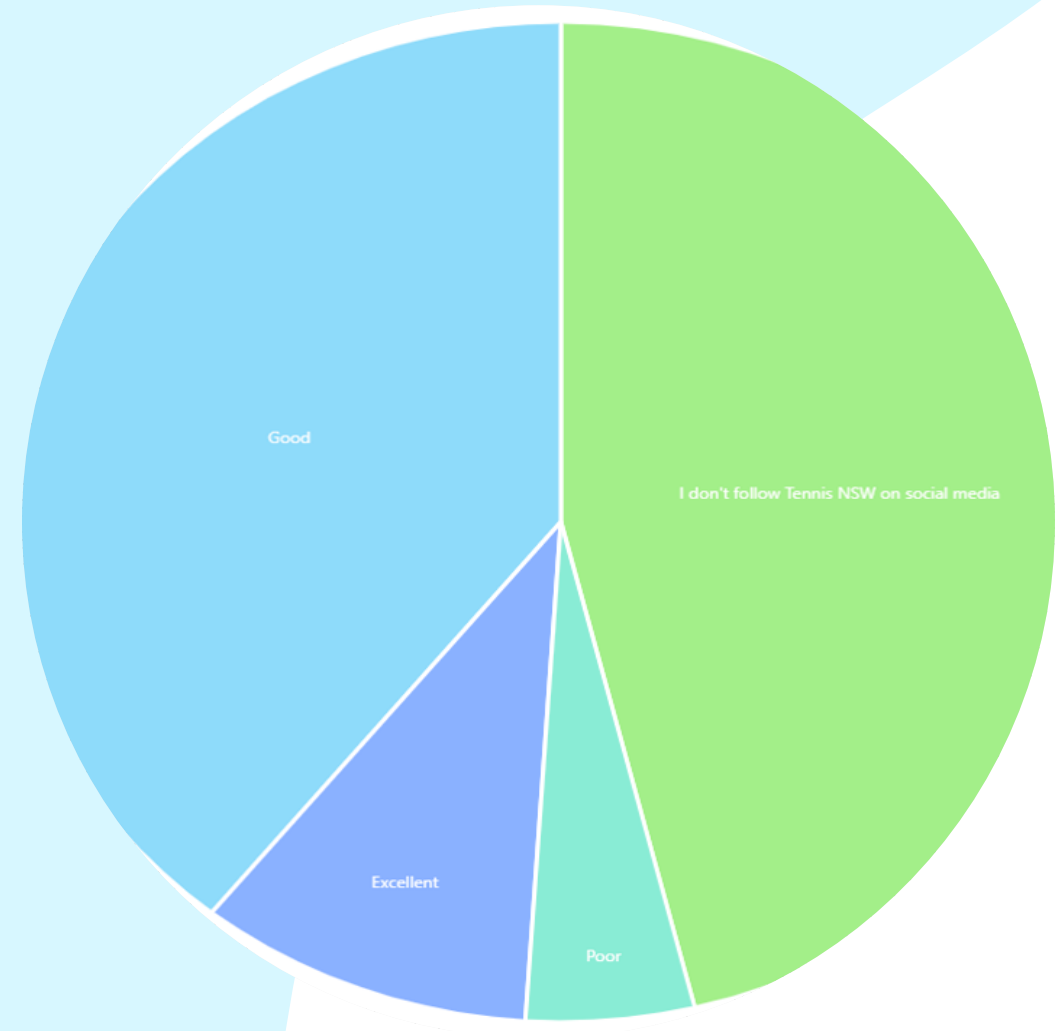
# Quality of Tennis NSW social media channels

10% - Excellent

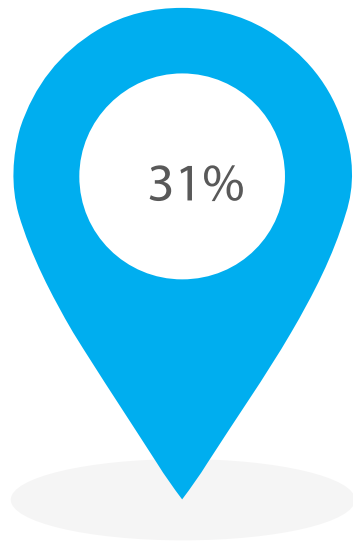
39% - Good

5% - Poor

**46% - I don't follow Tennis NSW on social media**



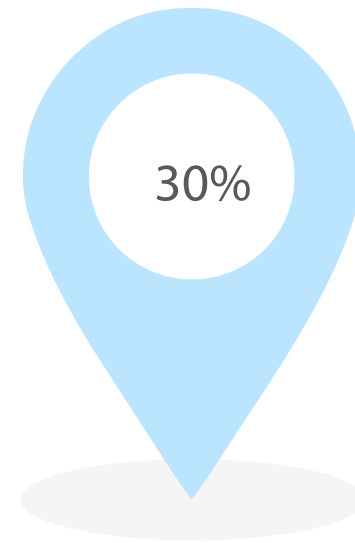
# Desire for Tennis NSW to assist in securing hygiene products for clubs



Yes



No



Impartial

# Key Themes

Whilst we can only draw some conclusions from a small sample, the general themes are as follows:

1. Clubs have been impacted although the extent of which is still hard to tell
2. Coach operators / businesses are very clear on the impact C-19 has had
3. Minimal co-operation / support towards Coaches from Club committees
4. Support / assistance from local council has been minimal – this may be due to the large number of clubs who remain on a peppercorn rent
5. Sentiment towards Tennis NSW is generally positive

# Next Steps

Tennis NSW Management to review results and commentary and determine appropriate actions from the pulse survey.

Management is liaising with Tennis Australia on Wave 2 of a further survey to be rolled out mid-August to our Members.

Thank you again to everyone who participated. We welcome and take on board your feedback and will continue to strive for excellence in all areas of the business.

Thank you, Tennis NSW