



**RETURNING TO PLAY:**

# HOW YOUTH & LOCAL SPORTS WILL TRANSFORM IN THE WAKE OF COVID-19

Recapping our Industry Leaders Survey to understand how organizers across the country are recovering, rebuilding, and adapting to a new normal post pandemic.



## OVERVIEW

As cities and states reopen in the wake of COVID-19, youth and local sports organizations will return to a different kind of play. At LeagueApps, we wanted to understand what this “new normal” would look like—and we knew that the best way to gather these insights was to talk to the men and women running clubs, camps, tournaments, teams, and leagues across the country. These are people who are balancing city and state mandates with those of the communities they serve, and the people who we believe are shaping the future of this industry.

In late April and May 2020, we polled more than 340 organizers running a variety of different programs, both for-profit and nonprofit, in almost all 50 states. Our respondents represent nine different sports—baseball, softball, basketball, hockey, soccer, lacrosse, field hockey, volleyball, and football—and a number of them also run multi-sport programs. We asked questions about financial health, virtual programming, program development, and parent dynamics—and the results say a lot about what the future holds.

To help us analyze their responses, we also took a look at our own platform data, which reveals a great deal about program and parent behavior in real time. Finally, we included insights from a recent Morning Consult report, which surveyed more than 4,000 parents of youth athletes.

What we found? For starters, there are more commonalities than there are differences when it comes to the ways in which organizers navigated the pandemic and are planning their return. In addition, many of the trends that had begun to define the industry prior to the outbreak have been accelerated—from programs consolidating out of financial necessity to the adoption of new technologies. Finally, organizations responded to this forced pause in different ways—and this will impact the success they have going forward.

While organizations will surely face challenges, we believe that the industry is positioned to return stronger than before: albeit not without changes. Read on for the full analysis.

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*LeagueApps is the operating system and community for youth and local sports leaders, providing them with the tools they need to manage and grow their organizations. Our goal is to help organizers deliver game-changing experiences to their parents, players, and coaches. To learn more, visit [leagueapps.com](https://leagueapps.com).*

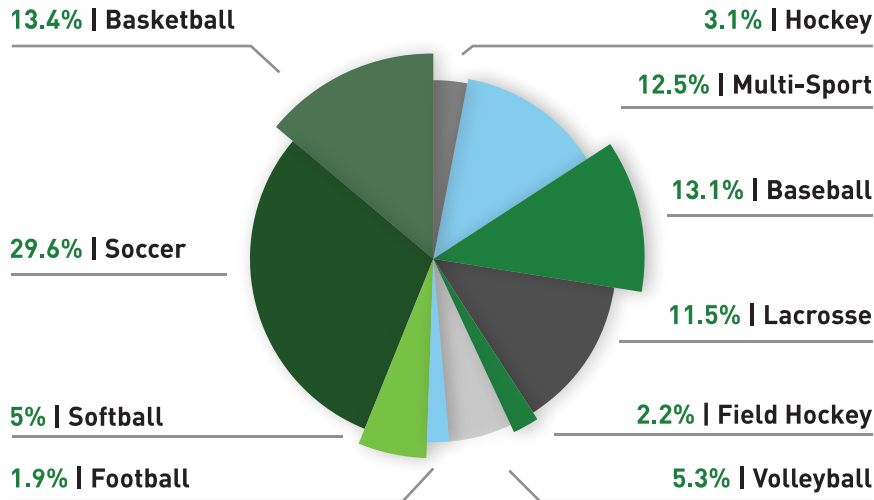
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# RESPONDENT BREAKDOWN



## PROGRAM SPORT

## PROGRAM LOCATION

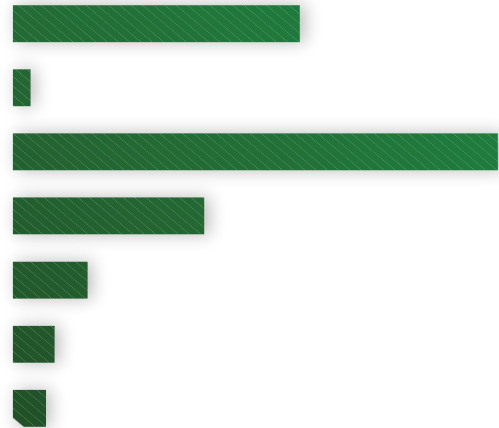
Northeast  
 Midwest  
 South  
 West



10% 20% 30%

## PROGRAM TYPE

League  
 Camp  
 Club/Travel  
 Multi  
 Town League  
 Tournament  
 Facility



10% 20% 30%

## SUMMARY

As cities and states continue to reopen in the wake of COVID-19, youth and local sports organizations will return to a different kind of play. While the pandemic impacted areas of the country disproportionately, our survey indicates that organizations across the country share most of the same perspectives and concerns, regardless of geographic location. Similarly, data only varied slightly by sport, likely due to the level of contact involved as well as historical funding factors.

In analyzing the responses, it is clear the industry will continue to face a number of challenges. However, we were also encouraged to see that organizers are adapting and innovating in ways that will push us all forward. The other big takeaway is that the trends we're seeing in these results, from consolidation to technological innovation, were all present prior to the pandemic—they have simply been accelerated.

Here is a summary of our findings.

### **Financial impact has been widespread, regardless of geography of sport.**

Across the board, organizers worry that they will struggle to pay for their facilities and staff in the coming months, and that the economic situation will make it harder for parents to spend money on sports. This is true for both community non-profits and private for-profit organizations.

### **In response to health and safety concerns, the industry is rapidly adapting.**

A majority of those we surveyed plan on modifying their programs in order to keep athletes and coaches safe, whether that means only playing outdoors or prohibiting fans at practices and games.

### **While sport is on pause, innovation isn't—and technology is winning.**

More than half of organizers said that they have launched virtual training programs and other digital offerings since the outbreak of the pandemic. Others say they have spent time in vesting in new infrastructure and internal processes that will allow them to better handle a crisis like this in the future.

### **Accessibility is a bigger issue than ever before.**

Kids were already being left out of youth and local sports. As Americans across the country continue to struggle financially in the wake of the pandemic, accessibility will be an even bigger issue.

### **Club programs are taking the lead.**

Our data suggests that club programs will emerge from this pandemic the strongest—whether that's due to funding, parent attitudes, or the ability and desire to innovate.

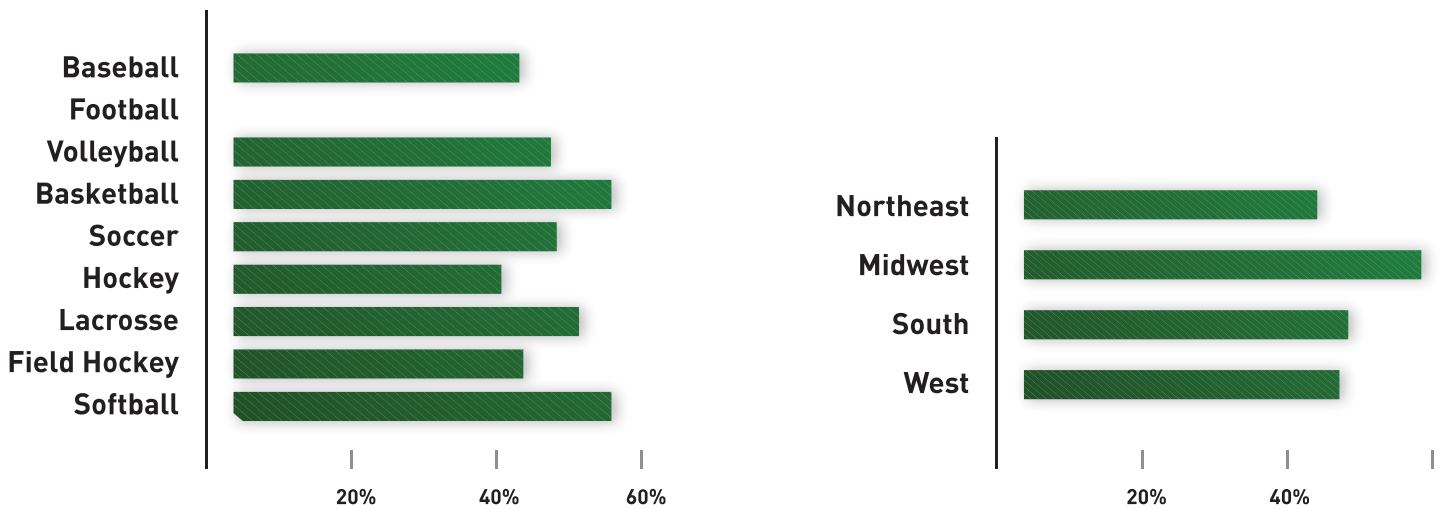
# FINANCIAL IMPACT HAS BEEN WIDESPREAD, REGARDLESS OF GEOGRAPHY OF SPORT.

**Half of those surveyed worry they won't have the funds to pay for facilities and staff.**

The result? The consolidation that has increasingly started to take place—larger organizations growing as smaller organizers are acquired, merged, or dissolved due to lack of funding and resources—will likely increase at a more rapid rate. According to our proprietary research, less than 3,000 organizations control more than 35% of the estimated registration volume in youth sports, while smaller organizers (with less than \$100,000 in yearly programmatic revenue) are shrinking by 15% year over year.

COVID-19 has without a doubt placed additional burden on organizations that were already struggling to stay afloat. On top of the fact that many organizations saw their revenue grind to a standstill, many organizers had to dip into their bank accounts to refund players and parents.

*I worry I won't have money to pay for my facilities and staff.*



Parents recognize this challenge as well. According to a recent Morning Consult [poll](#), 54% of youth sports parents expressed concern that a program their children participate in could fold.

**More than 10% of organizations will need to rebuild after shutting down completely.**

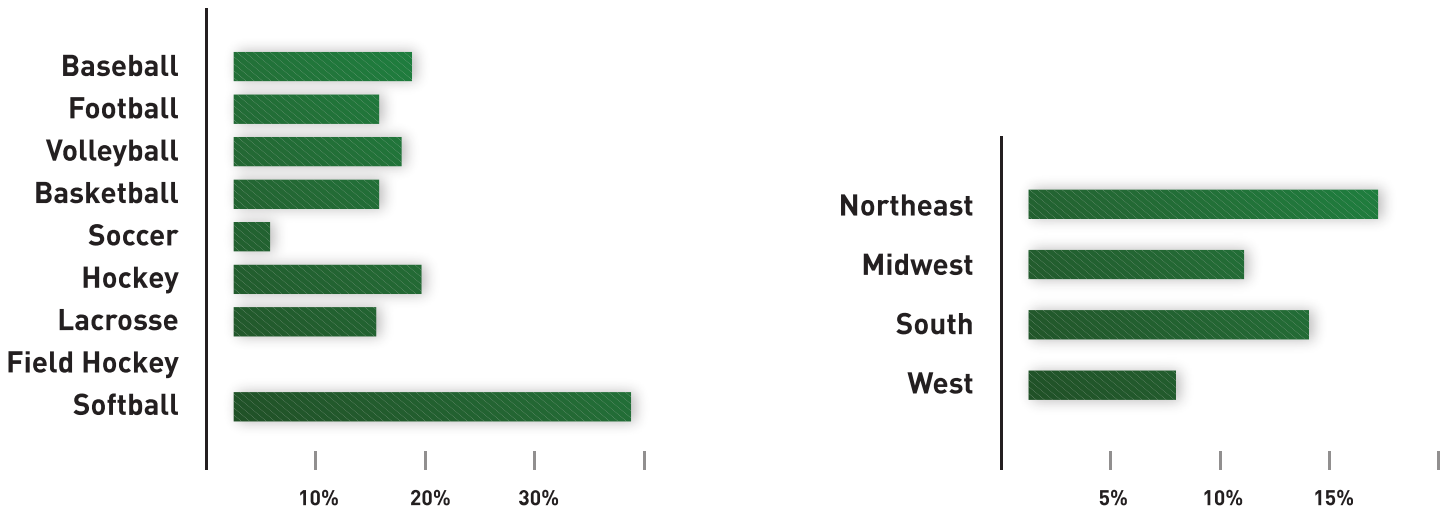
When looking at the organizations that were forced to shut down as a result of the pandemic, a few different factors stand out. For starters, sports that generally practice and play indoors, such as hockey and volleyball, saw their operations come to a halt at a higher rate than those that play outside, such as soccer and lacrosse.

Funding also plays a clear role in whether or not organizations were able to stay afloat. While many soccer organizations are non-profits, and are fortunate to have active boards and donors that can help them

navigate situations like these, sports like softball have historically struggled to secure the same kind of financial support.

Finally, results show that the Northeast, which was hit the hardest by the pandemic and will be the slowest to reopen, was home to the greatest number of total shutdowns.

*The Coronavirus has shut down my operations*

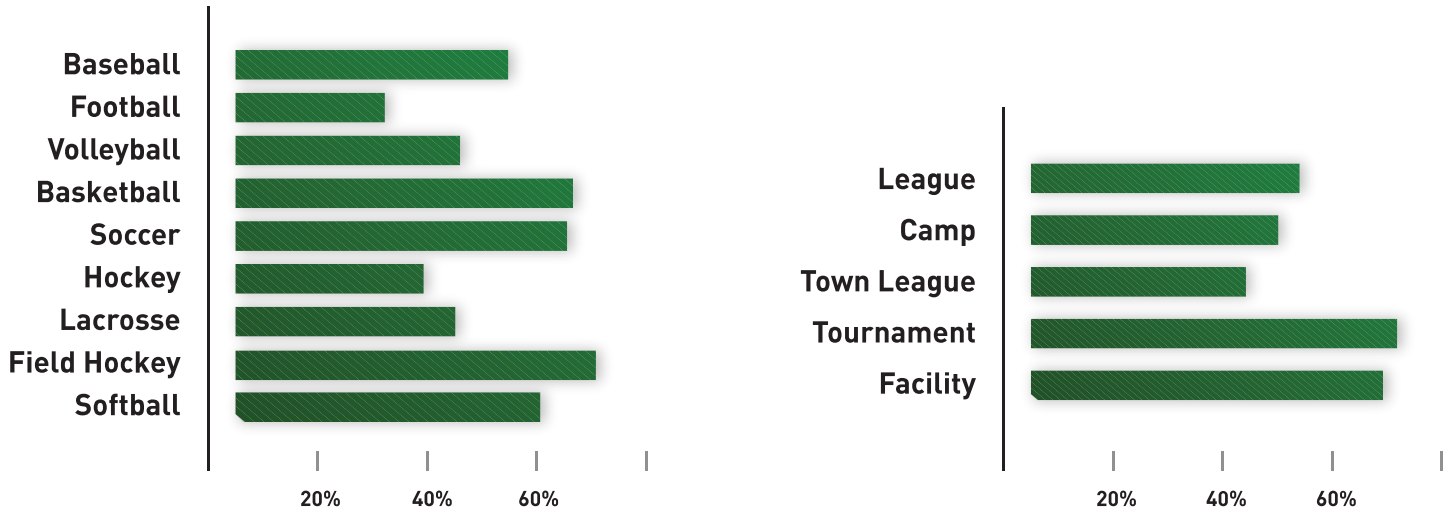


In the absence of increased economic support for the sports industry and individual families, there’s no question that this will continue to be a real issue for organizations. The issue with the CARES Act, [explained attorney Nicholas Simon](#) during one of our recent Town Halls, is that it was not designed to support businesses like youth and local sports organizations—many of which do not employ a number of full-time workers, and who had high fixed costs associated with their programs (field space, equipment, coaches, training and background checks).

This is why LeagueApps, along with a number of community and national sports organizations, have joined forces to launch the [PLAY Sports Coalition](#). We’re fighting to pass a youth sports stabilization fund that would support programs across the country, in particular sports-based youth development programs and non-profits. (You can learn more and get involved [here](#).)

**One positive finding: almost 60% of organizations have been using the pause to figure out ways to lower costs and generate revenue in new ways.**

Organizations are recognizing that the return to play may be uneven, and the larger economic crisis could impact youth sports participation for a long time. As a result, they report using this forced downtime to diversify their revenue streams and lower costs in an effort to stay financially solvent. This is especially true for those running basketball and soccer programs, which tend to attract children from the most economically and racially diverse backgrounds. The same goes for those running tournaments and operating facilities: decreased travel will change the shape of tournament operations for months (and maybe years) to come, while facility owners will need to find new ways to generate revenue with fewer practices and games.

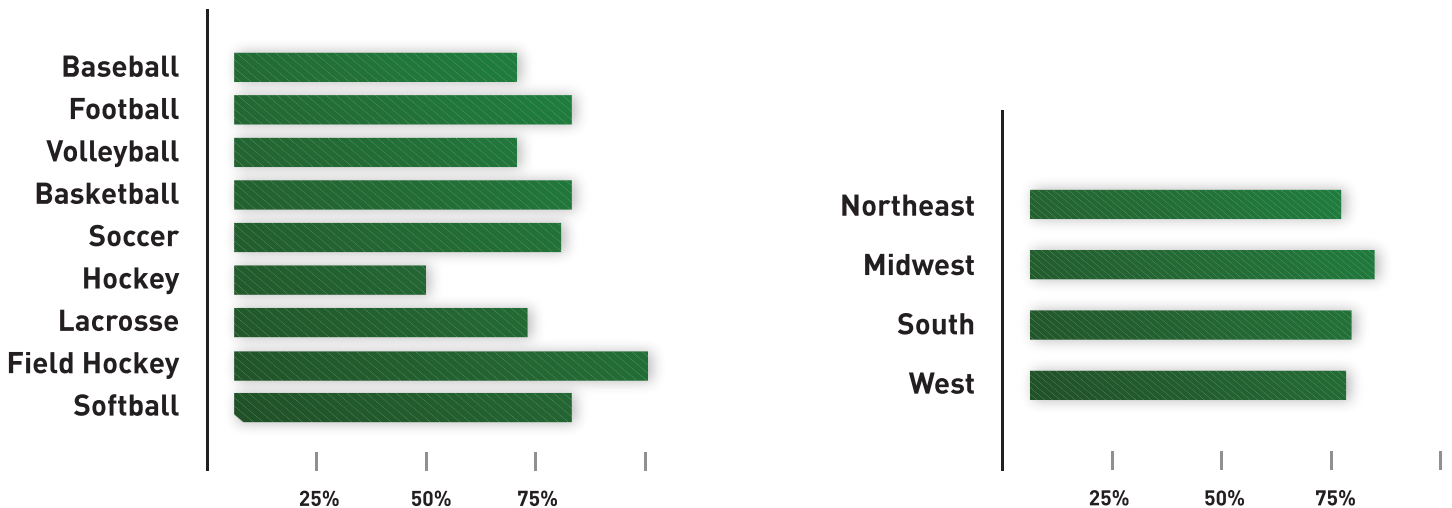


## IN RESPONSE TO HEALTH AND SAFETY CONCERNS, THE INDUSTRY IS RAPIDLY ADAPTING.

More than 75% of organizers worry that parents will keep kids out of sports even if they're able to open up programs. As a result, they're doing what they can to inspire confidence.

Even when cities and states open up, a majority of organizers expressed concerns that their families will be afraid to engage in team sports—a worry that transcends sport and geography. These fears are well-founded: according to a [survey](#) by North Carolina State University in partnership with the Aspen Institute's Project Play, Utah State University and George Mason University, 50% of parents worry their child will get sick from sports, while a Morning Consult [poll](#) reports that 50% of parents wouldn't support a full-return to sports without a vaccine.

*I worry that parents will avoid signing their kids up for sports out of fear.*

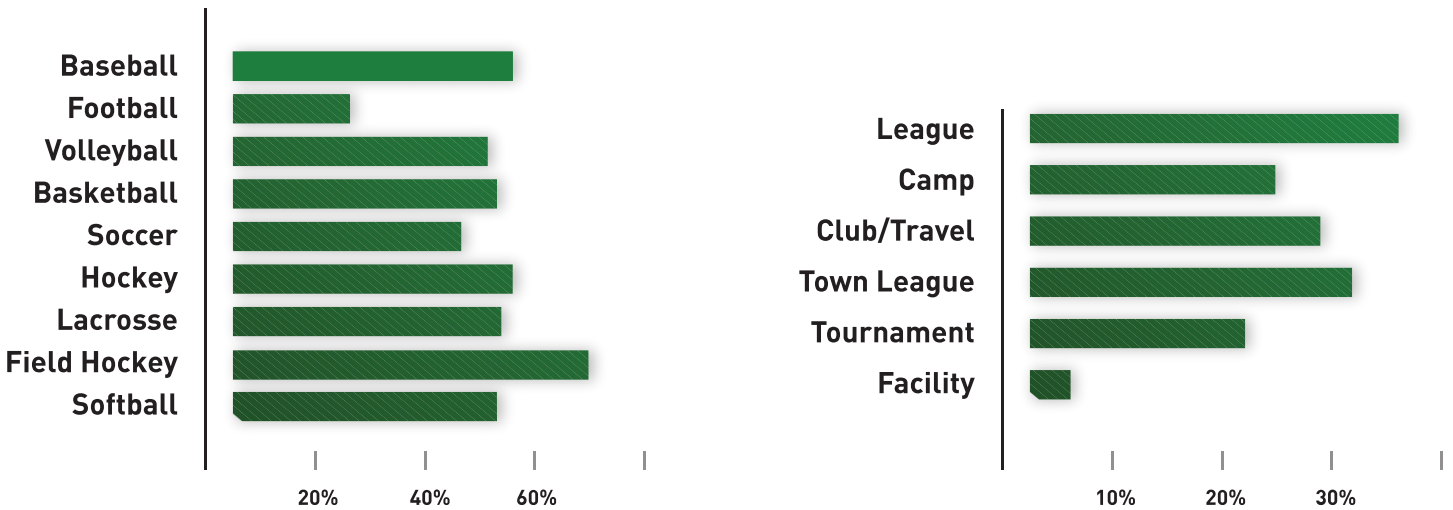




# RETURNING TO PLAY: HOW YOUTH & LOCAL SPORTS WILL TRANSFORM IN THE WAKE OF COVID-19

When it comes to adapting programming, organizers will do what they can—from minimizing the number of players on the court or in the dugout to completely rethinking the design of travel programs and tournaments. According to our recent Town Halls, the most immediate changes will likely involve small group training and supplementing in-person practice with virtual skills and drills.

*I will be making some changes to my programs.*

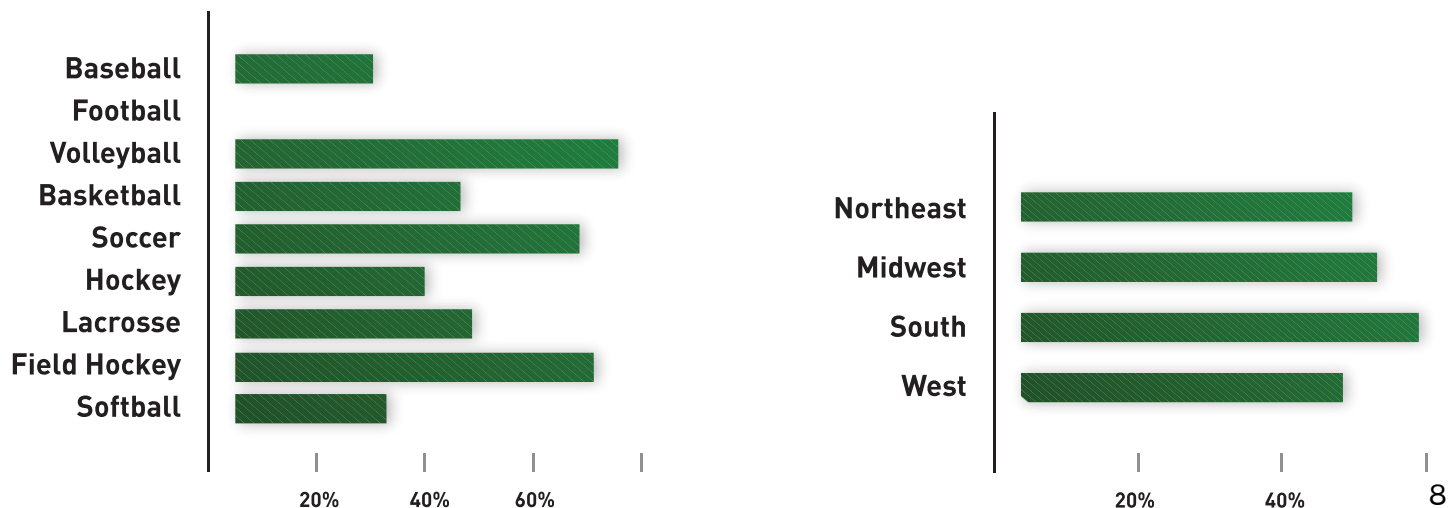


## WHILE SPORT IS ON PAUSE, INNOVATION ISN'T —AND TECHNOLOGY IS WINNING.

More than half of the organizers we surveyed have launched some kind of virtual programming since the COVID-19 outbreak, and another 15% plan on doing so in the near future.

Prior to the pandemic, virtual training was gaining steam. On our platform, we have seen a 4,000% year-over-year increase in registrations for digital programming—a trend that is likely not slowing down anytime soon.

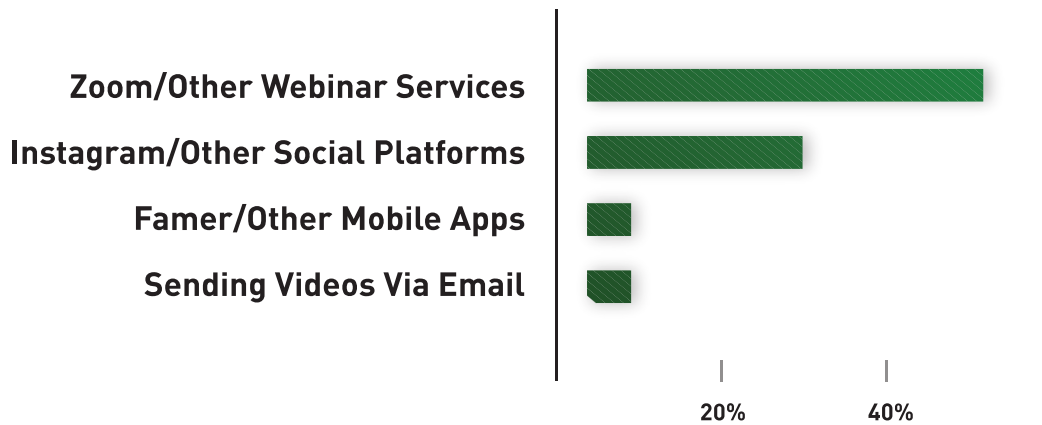
*I have launched virtual training since the outbreak of COVID-19.*





Since COVID-19 forced us indoors, organizations have used virtual training to keep coaches and players connected and build deeper relationships with parents. For some organizers, this training has proven to be an effective way to eliminate the number of requests for refunds; for others, it has actually been a way to generate additional revenue. Given that fees for digital programs are lower—according to our data, the average fee for virtual programming is \$30, compared to \$300 for in-person programs—this may be a particularly attractive option for parents who will struggle financially in the coming months.

Organizers have taken a number of different approaches to developing these offerings, from simply sending videos with drills via email to hosting live workouts via Zoom, Facebook, or Instagram. Many organizations are also embracing training technology like Famer, MaxOne, Techne, and HomeCourtAI—platforms that make it easy to develop and distribute virtual curriculums.

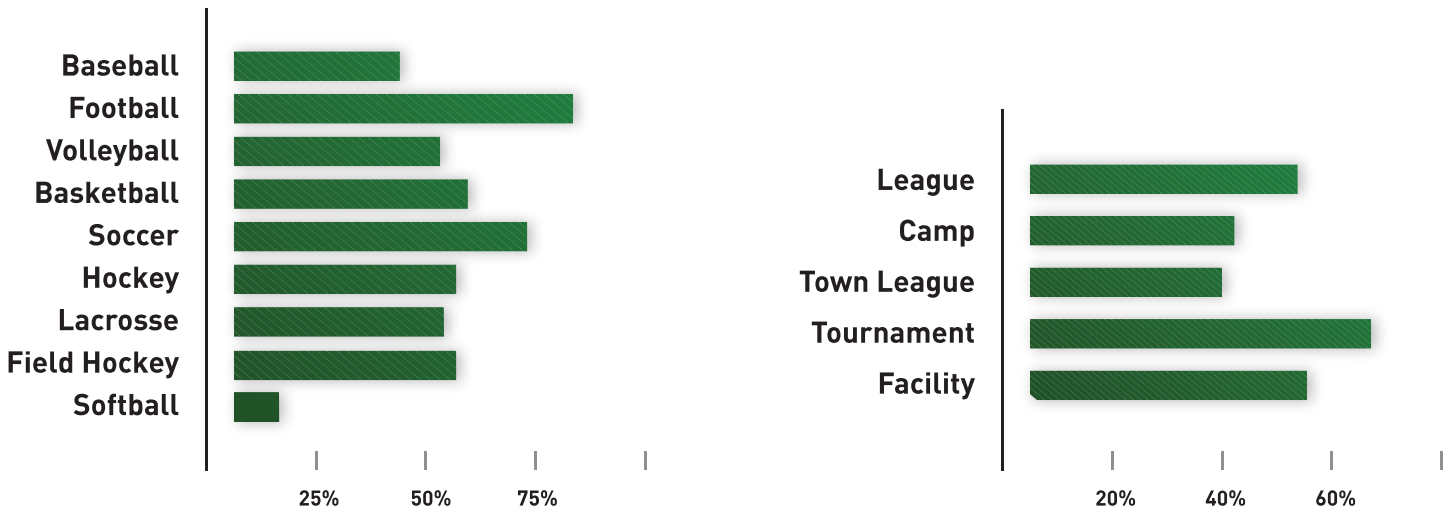


“Virtual training is teaching kids self discipline they didn’t know they had,” says Fred Wilson, Executive Director of the Mustang Soccer League in Danville, California. Beyond that, “it means we can have practice five days a week instead of just two or three. From January through June, our off-season, we’ll be able to create a new revenue stream. It will be a good supplement to what we’re doing on the field.”

Courtney Clements, Head Coach of the San Diego Bulldogs, a top basketball program run out of the Boys & Girls Club of San Dieguito, agrees that virtual training is here to stay. She emphasized how she’s brought in speakers to address her players virtually, helping them take away life lessons beyond what happens on the court. She’s also launched virtual film study that has been more productive and interactive than it was when the team gathered in person. When her club returns to play, they won’t need to cut into practice time to review tape—a major benefit.

**Over 60% of respondents said that they were able to use the downtime forced upon them by COVID-19 to improve internal processes, systems, and technology infrastructure.**

A silver lining of the forced pause in play, according to our respondents, is that it allowed them time to think creatively, adopt new technologies, and spend time optimizing their operations. The result: when sport returns, organizations may be better set up to support their customers and run their businesses more efficiently when sports do come back.



“I’m not going to say this has been easy, but it has forced us to think differently, and brought initiatives to the forefront that would have taken 2-3 years to get to,” says Sarah Natchez, Chief Operating Officer of Super Soccer Stars. “It has forced us to be efficient. And as we move forward it’s what will put us at the forefront of digital innovation.”

## **ACCESSIBILITY IS A BIGGER ISSUE THAN EVER BEFORE.**

**More than 60% of organizers are concerned that parents and families won’t be able to afford their programs as a result of COVID-19.**

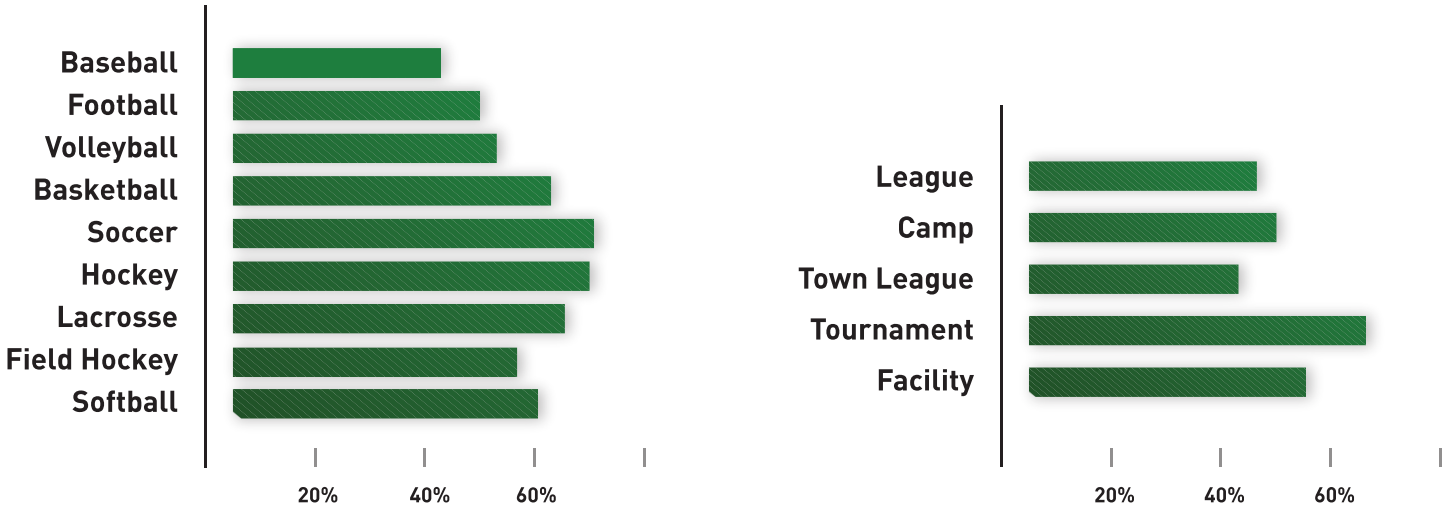
As it becomes more expensive to engage in youth and local sports, kids are increasingly remaining on the sidelines. This was true prior to the pandemic—and now, it’s magnified. According to [data](#) from Morning Consult, 55% of parents who make less than \$50,000 in annual income are less likely to enroll their child in youth sports in the wake of the COVID-19.

Our survey shows that club organizers were most likely to worry about parents’ ability to pay for programs, especially in travel-heavy sports like soccer, basketball, lacrosse and hockey.

At LeagueApps, we have been advocating for private sector solutions to ensure accessibility for years with our FundPlay program, pledging 1% of our revenue to impact 500,000 kids in underserved communities by the end of 2022. This is also a focus of the PLAYSports Coalition, which has been developing a family-focused strategy for sports participation in partnership with Rep. Max Rose. Learn more about the bill he recently introduced [here](#).

**Nearly 80% of club and travel programs believe that they will be able to fully “bounce back.”**

*I am worried about parents' ability to pay for my programs.*



## CLUB PROGRAMS ARE TAKING THE LEAD.

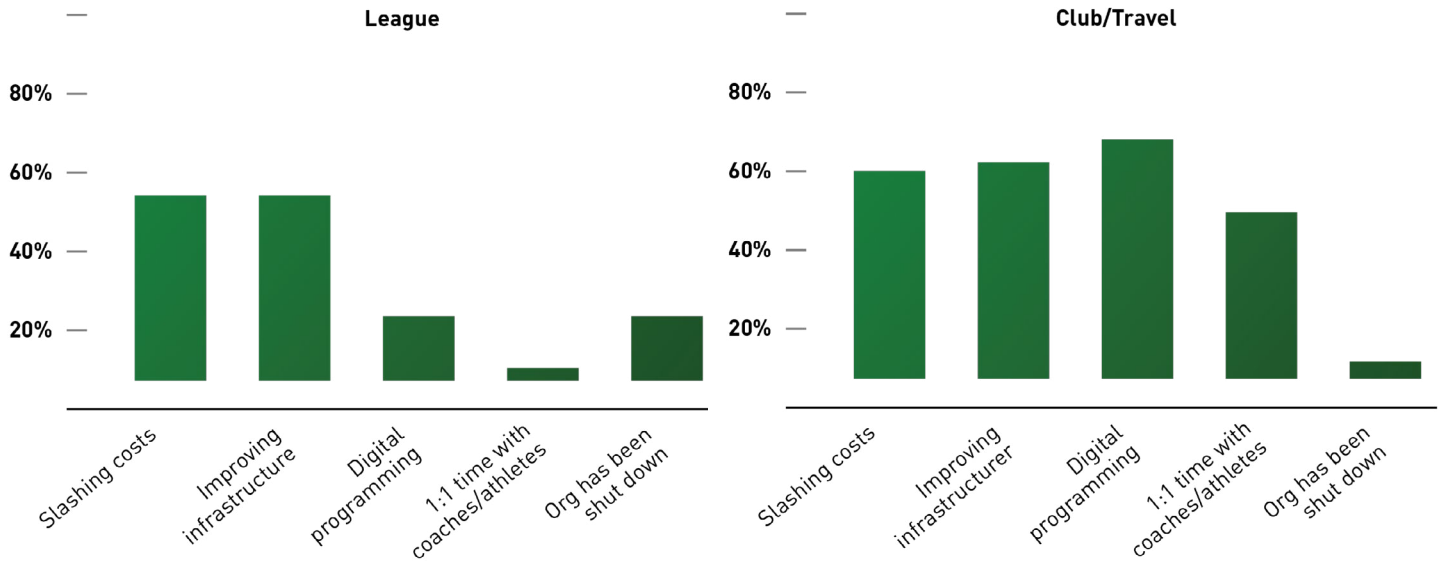
There’s been a lot of discussion about the need for a “reset” in youth sports, and a shift back to more recreational programs. However, based on our survey, it appears that club programs may be in a better position relative to local leagues during this return to play period.

Almost 50% of club programs have used the pause to stay engaged with their families and kids, spending 1:1 time with coaches and athletes for evaluations, virtual coaching, mentoring, college recruiting, and getting them ready for the next season. Additionally, over 60% of club programs, and 85% of multi-format programs that include competitive programs, have used the pause to invest in new processes and technology.

Parents attitudes in club and travel programs mirror this optimism. According to the Morning Consult [poll](#), two-thirds of parents of club and travel participants said that youth sports is the most important activity that their children participate in, versus more than half of recreational participants.

LeagueApps platform data supports these responses. In April 2020, while total program creation was down 53% year over year, and league program creation was down by 67% year over year, club program creation was up 23%. In May 2020, club program creation jumped even higher—up by 25%.

*How club programs have used the downtime compared to leagues*



**Over a quarter of all tournament and facility providers believe that their businesses will be severely disrupted.**

Many tournaments and facilities are recognizing the reality that return to play will involve less travel and less large format tournament play. Over 78% of tournament operators and 94% of facilities are planning modifications in their programs. Over two-thirds of these organizations are also using the pause spending their time thinking about new business models and lowering costs.

**More than 80% of town leagues are concerned that families won't sign-up for their programs during this return to play, and almost 50% were concerned that they would be severely disrupted in 2020.**

At a time when local play has become a greater focus, many town leagues may be not ready to adapt to the changing circumstances of the pandemic. These programs were the least likely to have used the time to engage families, less likely to adopt virtual programming, and least likely to have used the time to improve internal processes, systems, manuals, and technology infrastructure.

## **WHERE WE GO FROM HERE**

Moving forward, it's clear that youth and local sports will look different this summer and fall. One of the things we've heard most often from organizers is that they will need to focus on prioritizing health and safety of their participants, and protecting themselves from liability—developing waivers that outline protocols for social distancing, preventative safety measures like temperature checks, and what parents can do at practices and games.



## RETURNING TO PLAY: HOW YOUTH & LOCAL SPORTS WILL TRANSFORM IN THE WAKE OF COVID-19

Conversations in our NextUp Industry Group on Slack suggest that many organizers will work with parents and players to design these phases together, arriving at a plan that gives people confidence.

The manner in which organizations have responded to the youth sports pause may also reflect how they succeed in the period coming out of it. The unpredictability of the COVID-19 recurrence and broader economic overhang may reward organizations that have incorporated technology into the operations and programs, and adapted their cost structure and operational model. At a minimum, organizations that have demonstrated flexibility may need to continue to call on that skill.

Lastly, with accessibility to amazing sports experiences even more of a concern, there's a responsibility and opportunity for the industry to keep all children in mind during the return to play, and an invitation for organizations to apply their innovation muscle to the challenge of participation.

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*If you're looking for more return to play resources, be sure to follow LeagueApps on [LinkedIn](#) and check out our [blog](#). We'd also be happy to discuss these survey results in more detail. If you have any questions, email [jeremyg@leagueapps.com](mailto:jeremyg@leagueapps.com).*