

KANTAR

Future of play, recreation and sport

Stakeholder research report





1 Background and method

Sport New Zealand needed sector insights into its longer-term future thinking

Context

- Sport New Zealand is progressing a study on the future of play, recreation and sport
- It is envisaged the project will be in two stages: a sector study followed later by a public study, based on a similar questionnaire
- This report covers stage 1 – consultation with stakeholders

Job to be done

Inform Sport New Zealand about longer-term needs of the sector to inform appropriate investments and interventions

Summary of survey method and response

This document contains a summary of the findings based on the full set of responses to the stakeholder survey

Invitations to participate were sent out across a range of different channels including:

- Sport NZ's Partner Update
- Balance is Better email
- Links embedded on the Sport NZ website and publicised on its social media channels
- Invites emailed to the Futures working group
- Invites emailed to key academic stakeholder

In total, we received 439 responses to the survey between 29th September and 27th October

Profile of respondents

ORGANISATION WORKED FOR	%
Sports club	35%
Regional Sporting Organisation	12%
Play, active recreation and sport private sector	12%
Health sector	11%
National Sporting Organisation	10%
Secondary school	10%
Regional Sports Trust	8%
Primary school	8%
Government department	7%
Academia	7%
Local council	5%
Maori organisation	3%
Play organisation	3%
Disability organisation	3%
National Recreation Organisation	1%

JOB TITLE / ROLE	%
CE or equivalent	18%
Senior management	21%
Middle management	15%
Community sport	35%
High performance sport	11%
Marketing / communications	9%

AGE	%
Under 20	2%
20 – 29	8%
30 – 39	18%
40 – 49	36%
50 – 59	22%
60 or over	12%
Prefer not to say	3%

REGION	%
Northland	2%
Auckland	25%
Waikato	9%
Bay of Plenty	6%
Gisborne	1%
Hawke's Bay	2%
Taranaki	3%
Manawatu-Whanganui	3%
Wellington (& Wairarapa)	19%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	0%
Canterbury	12%
Otago	9%
Southland	4%

Profile of respondents

ETHNICITY	%
New Zealand European	79%
Maori	15%
Samoaan	1%
Cook Islands Maori	1%
Tongan	1%
Niuean	1%
Chinese	1%
Indian	0%
Other	13%

GENDER	%
Male	42%
Female	52%
Gender diverse	1%
Prefer not to say	5%

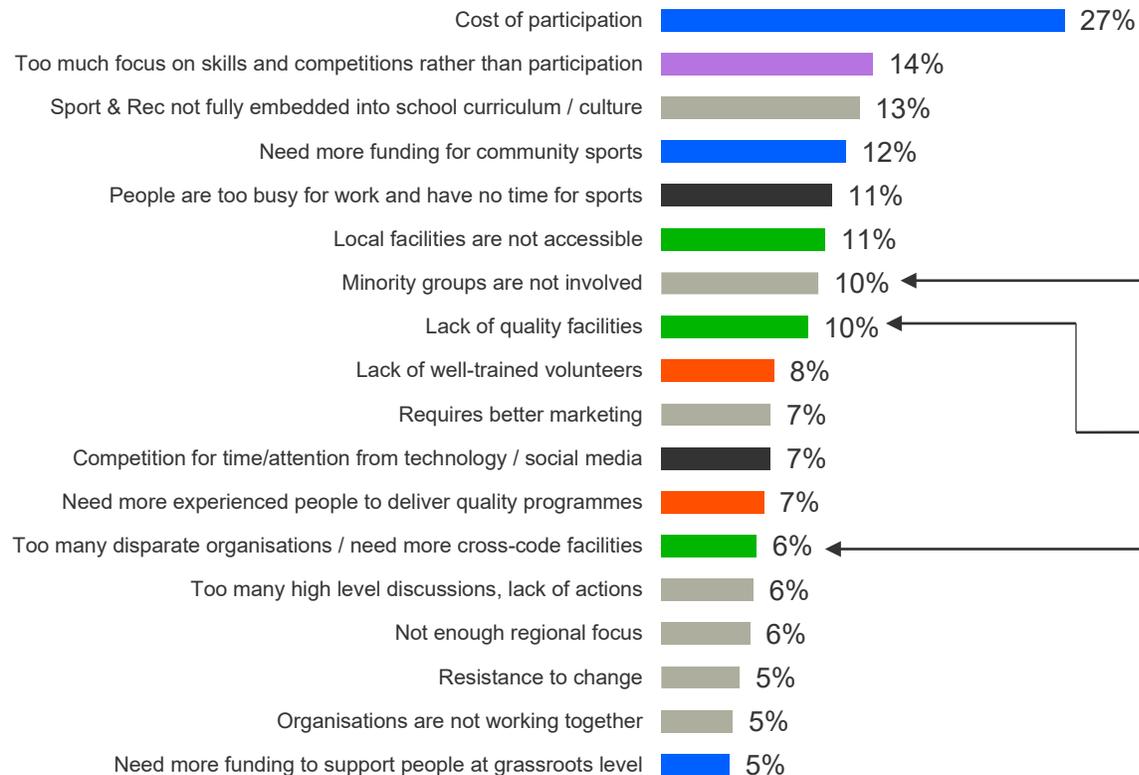
2 General findings



Costs are the main reasons given for strain in the system, although a wide range of interlinked factors are mentioned

Can you explain why you feel the current system is under strain?

Coded reasons (mentioned by 5% or more shown)



Those working at the **local level** have the greatest concern about **cost of participation**, although it's a key issue for all subgroups
National 24% Regional 23% Local 35%

Stakeholders in **Maori organisations** are more likely to want to see more involvement from minority groups
Work at Maori organisations 18% Work at other organisations 9%

CEOs are more likely to be concerned about the **lack of facilities**
Chief Executive or equivalent 20% Others 9%

Those working at the **national level** are most likely to mention a need for more cross-code facilities – local stakeholders are less sure of this
National 14% Regional 8% Local 5%

The high focus on competition comes from both the unequal allocation of system resources and the encouragement of schools, parents and coaches

Can you explain why you feel the current system is under strain?

Cost of participation

"I think the cost of participating in sport is increasing too fast and causing more and more dropouts at all levels. Everyone is trying to take a piece of the pie which is disappointing to see"

"Financially not everyone can afford to have their children participating in sports. The cost of entry at some venues is a barrier, especially if you have more than one child. Not to mention if your child makes a rep team, the additional costs are hard."

"Cost of many sports especially if they are on turfs, pools, inside venues etc."

"Cost - for equipment, access to venues, fees, suitable clothing and shoes etc Income inequalities"

Too much focus on skills and competitions rather than participation

The system is allocating more resources to high-performance sports

"Demands from adults on "winning", "achieving", and allocation of resources towards growing professionalism and priority of competitive sport outcomes."

"Much of the focus is placed on organised sports, team sports etc. This excludes money, attention and encouragement going towards active recreation, active transport, and active lifestyle choices being a part of everyday life in NZ."

Schools, parents and coaches encourage kids to be more competitive

"In terms of youth sport, the expectations and behaviours from parents/adults is ruining the overall experience and turning kids off. This is a downstream effect of professionalisation of sport and the need for 'winning' and for their child to be seen and 'selected' as a superstar. Too much importance put on being the best, 'my son is better than your son' type attitude. There is also far too much emphasis on school performance in sport, and it is becoming a business lever rather than a extra-curricular activity that is secondary to educational outcomes."

"Too much emphasis on winning and not enough on participation. Starts with adults and trickles down to kids. Because adults want their kids team to win pressure is placed on selecting the strongest players and giving them the best coaches etc which makes them get even stronger."

The system lacks integration and focus in schools, with resistance at governance levels

Can you explain why you feel the current system is under strain?

Sport & Rec not fully embedded into school curriculum / culture

“Poor integration between school play, kids' individual preferences for sport / activity type, formal sport training / education / coaching.”

“Lack of cultural activities and existing cultural barriers continue to discourage many Maori to participate in physical activity, in our current education and sporting systems.”

“For my social group, the system works very well at school level. At my school, everyone had to play a sport, and most people did so with enthusiasm - sport is an important part of the culture of young kids. At university level, it then drops off significantly - for rugby, more so than it used to.”

Need more experienced people to deliver quality programmes

“Too many facilitators filling out reports. We need more PE specialists in schools, Outdoor Education is critical and has become too hard to implement.”

“Amount and quality of coaches and leaders in the system that provide positive enough experiences for our young people to remain active in sport and recreation”

“Low levels of knowledge among educators in how to engage students in meaningful curriculum based physical activity across the school environment”

Resistance to change

“Inability of people to adapt and accept change as a positive thing. People in governance level boards or committee not evolving, delegating or stepping aside for new generation. Lack of understanding that grassroots and community are the focal points.”

“Funding models, ‘old-school’ mentality of those in decision making positions (at all levels - club committees through to councils)”

“The decision makers in our sports structure - we as the NSO have little control over change because it is voted by Associations. Associations are slow to come around to new ways of thinking and are stuck in the old way/traditional which is not suiting our new participants. Change takes a long time to put into place.”

Many stakeholders include elements of balance in their descriptions of the ideal future system

Please explain what your ideal play, active recreation and sport system would look like in 15 years' time

Coded reasons (mentioned by 5% or more shown)



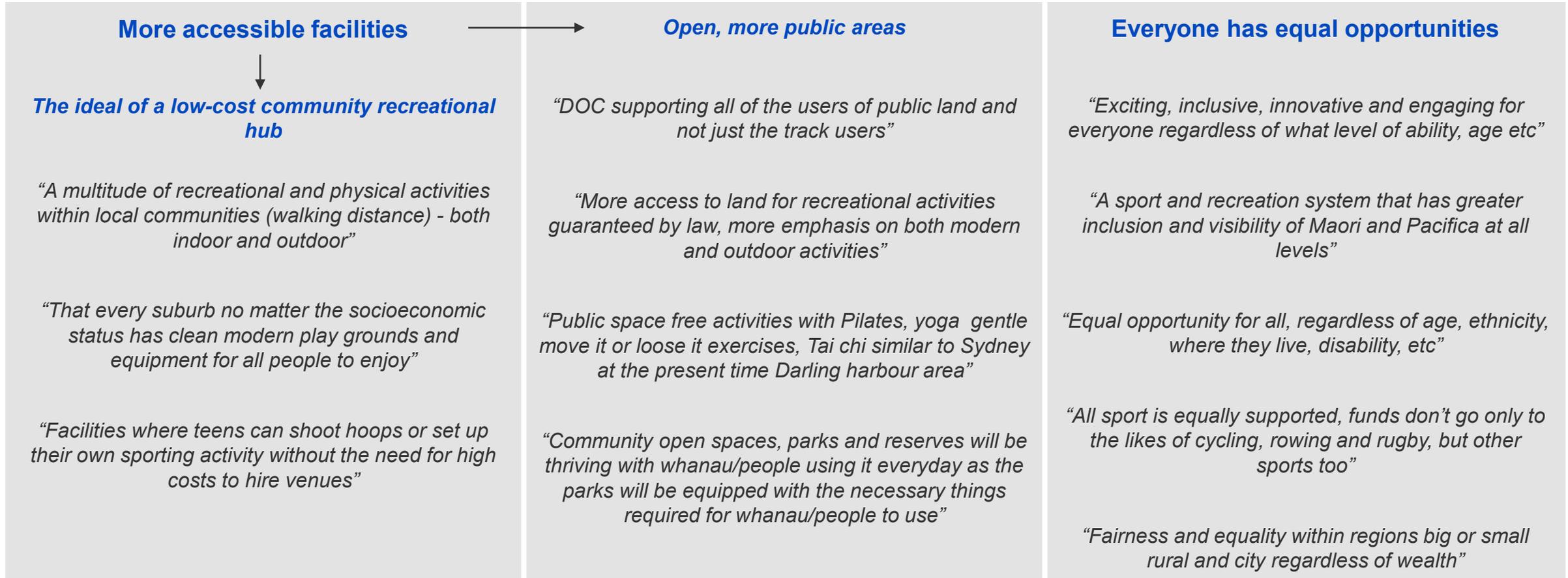
Equal opportunities is a key feature of the future for those in **Maori or regional organisations**
Work at Maori organisations 36% *Work at other organisations 21%*
National 24% **Regional 32%** *Local 20%*

Those in regional organisations are most keen on collaboration
National 14% **Regional 17%** *Local 10%*

CEOs think the ideal future system would be led by local communities
Chief Executive or equivalent 16% *Others 7%*

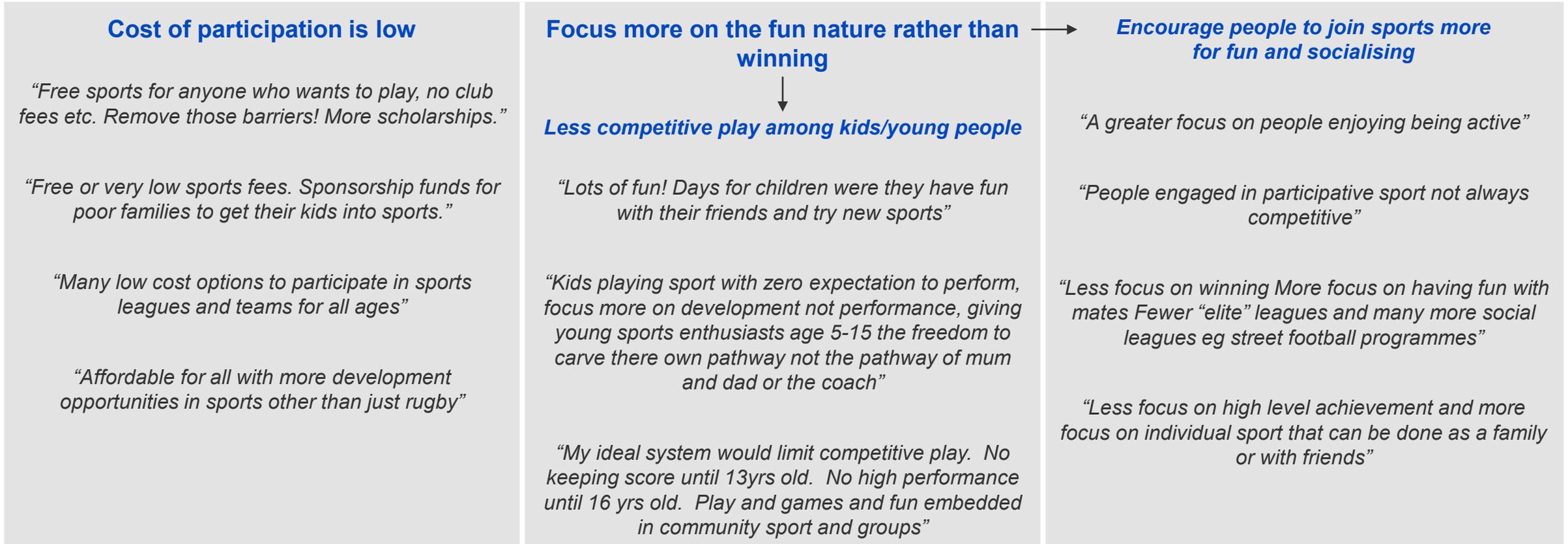
The ideal system not only provides equal opportunities to every demographic groups and region, but the same support to all sports

Please explain what your ideal play, active recreation and sport system would look like in 15 years' time



Ideally there would be more encouragement for both adults and children to join sports for fun rather than competition

Please explain what your ideal play, active recreation and sport system would look like in 15 years' time



People will pay more attention to fitness in general, and sporting organisations at all levels will work better together

Please explain what your ideal play, active recreation and sport system would look like in 15 years' time

Wellbeing/fitness focus

“A system where play, active recreation and sport is seen as part of everyday life to enhance relationships, community and health.”

“Being physically active both incidental & intentional will become a natural every day occurrence for all people from all ages & all walks of life”

*“People walking to work 20 min exercise Each day
Clean green NZ ideology in play Decreased
OBESITY!!!”*

It is extremely important to maintain a fitness programme whether within sport or just for general fitness and health”

More collaboration across organisations

Organisations share the same goal and collaborate more with each other

“Getting people active, enjoying being active and staying active over their lifetime needs to be a key goal across all of govt and local government and all need to be held accountable.”

“Ensuring that the Ministries of Sport & Recreation, Health and Education are working together. We need to ensure that facilities and programmes are available to all who want to use them. “

“Sports working together better, Sport New Zealand communicating and involving NSO's more in the solutions.”

Cooperation across sporting codes

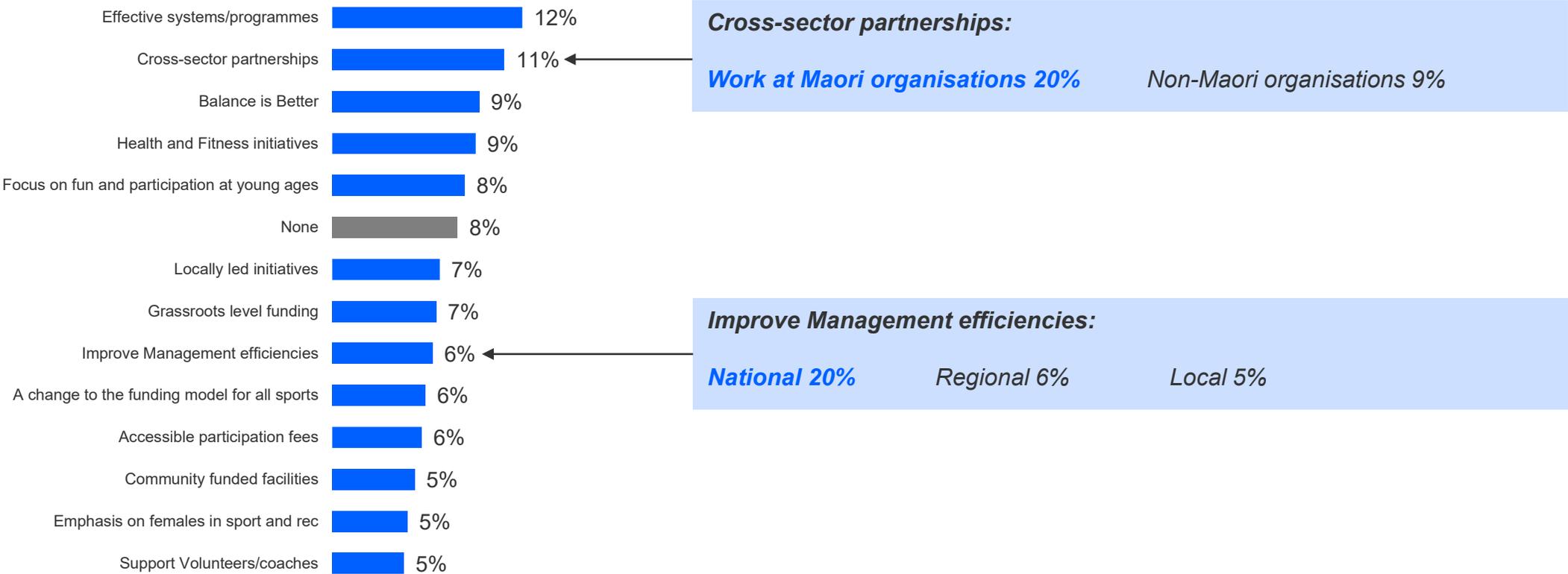
“National level, Regional level, Community level. At community level a number of sporting codes could integrate under a one club banner and be managed by a professional team to provide financial / business services / promotional and health and fitness support across the whole community.”

“I would aspire to have a sporting system that is similar to the Australian RSL set up. Where different sporting codes combine into one central location, which would be the heart of the community. Meaning that a number of different sports could feed off the one venue, it can be sustainable for the future and offered a shared service model for all to use. “

A range of examples of actions or trends are given, but there is no strong single consistent answer coming across more frequently than others here

Thinking about this ideal system, which actions, initiatives or trends are you aware of today that could help get us there?

Coded reasons (mentioned by 5% or more shown)



Having a variety of people at the decision-making level will help to deliver various forms of sport programmes

Thinking about this ideal system, which actions, initiatives or trends are you aware of today that could help get us there?



More funding for underfunded sports and communities is needed

Thinking about this ideal system, which actions, initiatives or trends are you aware of today that could help get us there?

Cross-sector partnerships

“A closer relationship between Ministry of Education and Sport NZ as well as with Councils”

“Sport to work with Ministry on Education an getting sport into the in school curriculum”

“More collaboration and Partnership with communities and Decision makers”

“Engage with Hapu and Maori educators/health practitioners but more importantly, Maori who hold cultural knowledge and Maori who have studied in Physical Education, Maori who are practitioners in taonga taakaro. Maori health experts, Whanau Maori”

A change to the funding model for all sports

“More even spread of funding across all sports would be a good start!”

“Prioritisation of funding to traditionally underfunded sports, activities and communities”

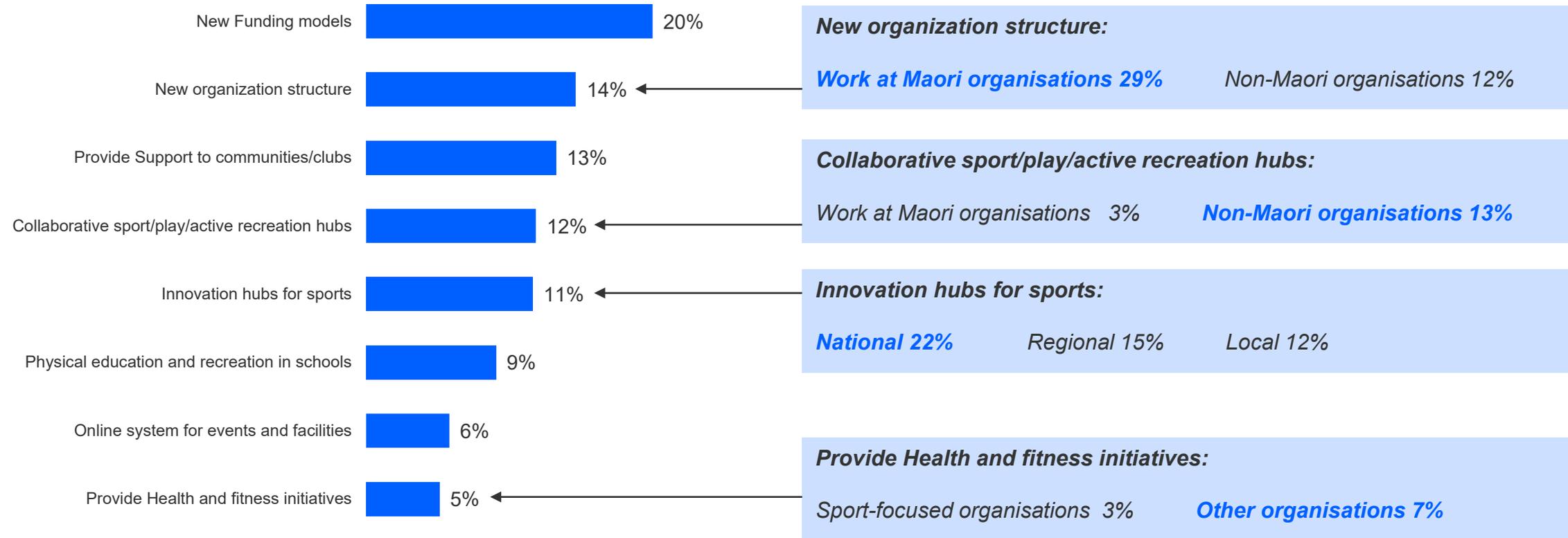
“Greater funding towards targeted local and community based sporting programmes with support from the wider RSOs”

“A change to the funding for all sports - we are an organisation that does extensive delivery to lower deciles school students and receive no salary funding”

New funding models and organisation structures are seen as key enablers of a move towards a more ideal system

Which innovations will speed up the time it takes to reach this ideal system?

Coded reasons (mentioned by 5% or more shown)



More funding is needed for quality programmes and facilities to speed up the time to reach the ideal system

Which innovations will speed up the time it takes to reach this ideal system?

New funding models



More funding for quality programmes/initiatives

“Futures funding made available to trial pilots programmes/initiatives (measurable and actionable)”

“More funding for initiatives that try new approaches and properly monitor and evaluate the outcomes.”

“Government funding given to clubs to offer cheaper access, food etc to professional games. “

“Funding for event deliverers as classic RSO's are short staffed and have this as their last priority”

More funding for facilities

“Money does need to spent on facilities and having them available for all sports. “

“Major change to funding systems to prioritise investment around key participation activities and also to stop investment in single use facilities”

“A Govt fund to help ease the pressure of money and the upgrading of facilities. “

Provide support to communities/clubs

“Give money and support to grassroots communities in order to innovate change. Or at least allow flexibility in programmes to allow for local flavours. Involve those communities in all the processes”

“Contact with National Sporting Code Associations/Schools - bring them to the table to discuss how this can be achieved right down to a grass roots level in all parts of NZ.”

“I'm not sure the government continuing to put money into sport is sustainable long term but it can perhaps help to make clubs more buoyant. Perhaps putting more money into promotion and available options in your community would help.”

Less administration and more usage of digital technology are key to quickly reach the ideal system

Which innovations will speed up the time it takes to reach this ideal system?

New organisation structure

“Employing people with an open mind and let tradition not get in the way.”

“Trust Maori to engage and deliver to Maori.”

“Sport NZ should have a shared services team that provides all tech, admin, HR, Legal and other advisory services for sport. The burden of administration can be greatly reduced, allowing sport to invest in much needed system change.”

“Simplify - perception that SportNZ has become an inefficient GOVT department with too much resource being tied up at the governance and administration levels which could be better used at community level”

Innovation hubs for sports

“Digital Delivery - a video lesson and support system created immediately across multiple sports“

“Innovation such as augmented reality for training and racing and taking effort out of physical course set up. Also the ability to replay or practice using AR or VR. More camera and drone tech for better angles of competitors and sharing performance wider than just TV and mainstream.”

“Create innovation hubs and resource them. These hubs must be multi disciplinary and need people from outside the sector. They should also be closely linked to a local community”