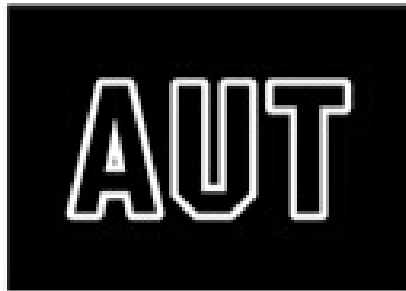


2019 REPORT

NATIONAL SPORT CLUB SURVEY



BACKGROUND

The National Sport Club Survey (NSCS) aims to generate insights that can be used to improve sport for all New Zealanders. While other sport industry data exists at individual level this survey provides a unique snapshot of the sport sector at club level.

Special thanks to project partners: Dynasty Sport, Pinnacle Corporation, Unlimited Ltd and Expert Services.

Regional seminars related to the NSCS are one way that insights are shared with the sport sector.

Congratulations to the Burnside Indoor Bowls Club (Dunedin) the winners of the prize draw. The club was given a \$500 apparel credit from Dynasty Sport.

METHOD

An email invitation was sent to representatives of more than 5800 sport clubs across the country. Representatives of 775 clubs completed the survey. 70 sports and all 16 Regions of New Zealand are represented. The survey captures the sport club experience of an estimated 150,000 Kiwis.

Numeric and open-ended questions were posed to club representatives across six focal areas including:

MEMBERSHIP

FACILITIES

SPONSORSHIP

MANAGEMENT

GOVERNANCE

VOLUNTEERS

A variety of insights from the 2019 NSCS are provided in the pages that follow. As you interpret results please consider that larger, more organised clubs are likely overrepresented forming a response bias. The insights are best used to foster discussion within and across sports.

SPORTS WITH MOST CLUBS REPRESENTED

ATHLETICS	25	GYMNASTICS	16
BADMINTON	26	HOCKEY	20
BOWLS	133	MULTI-SPORT	33
CRICKET	20	NETBALL	24
CROQUET	22	RUGBY UNION	23
FOOTBALL	34	SWIMMING	15
GOLF	55	TENNIS	28

PARTICIPATING CLUBS BY REGION

NORTHLAND	34	WELLINGTON	94
AUCKLAND	134	MARLBOROUGH	11
WAIKATO	76	NELSON	11
BAY OF PLENTY	50	TASMAN	6
GISBORNE	4	WEST COAST	6
HAWKE'S BAY	33	CANTERBURY	117
TARANAKI	29	OTAGO	57
MANUWATU/WANGANUI	42	SOUTHLAND	35

RESULTS

OVERALL FINANCIAL HEALTH

VERY FEW (5%) PARTICIPATING SPORT CLUBS REPORTED LOSING MONEY

	SURPLUS %	BREAKING EVEN %	LOSING MONEY %
NEW ZEALAND	39	56	5
RURAL	40	55	6
TWO SPORTS	35	53	12
THREE+ SPORTS	27	67	7
LARGE CLUBS (>300 MEMBERS)	43	54	4
SMALL CLUBS (<100 CLUBS)	35	59	6
ATHLETICS	33	54	12
BADMINTON	25	69	6
BOWLS	40	53	7
CRICKET	30	70	0
CROQUET	50	45	5
FOOTBALL	42	58	0
GOLF	37	61	2
GYMNASTICS	31	62	6
HOCKEY	21	74	5
NETBALL	25	67	8
RUGBY UNION	32	54	14
SWIMMING	27	73	0

MEMBERSHIP

CLUB SIZE	MEMBERS
NEW ZEALAND	190
RURAL	126
ATHLETICS	134
BADMINTON	76
BOWLS	78
CRICKET	151
CROQUET	44
FOOTBALL	563
GOLF	323
GYMNASTICS	340
HOCKEY	154
NETBALL	109
RUGBY UNION	390
SWIMMING	127

THE AVERAGE SIZE OF
PARTICIPATING SPORT CLUBS WAS
JUST BELOW 200

THE AVERAGE ANNUAL COST OF AN
ADULT PLAYING MEMBERSHIP WAS
\$227

COST OF ADULT MEMBERSHIP	\$
NEW ZEALAND	227
RURAL	168
ATHLETICS	73
BADMINTON	158
BOWLS	113
CRICKET	191
CROQUET	188
FOOTBALL	234
GOLF	517
GYMNASTICS	500
HOCKEY	414
NETBALL	170
RUGBY UNION	115
SWIMMING	172

MEMBERSHIP

SHRINKING MEMBERSHIP	%
NEW ZEALAND	23
TWO SPORTS	23
THREE+ SPORTS	6
ATHLETICS	20
BADMINTON	0
BOWLS	37
CRICKET	25
CROQUET	15
FOOTBALL	15
GOLF	52
GYMNASTICS	6
HOCKEY	10
NETBALL	25
RUGBY UNION	18
SWIMMING	7

JUST LESS THAN ONE QUARTER OF PARTICIPATING SPORT CLUBS REPORT SHRINKING MEMBERSHIP

ON AVERAGE, 80% OF CLUB MEMBERS VISIT THE CLUB OR PARTICIPATE IN A CLUB ACTIVITY AT LEAST ONCE PER MONTH

MEMBERS ENGAGED AT LEAST ONCE PER MONTH	%
NEW ZEALAND	80
RURAL	80
LARGE CLUBS (>300 MEMBERS)	82
SMALL CLUBS (<100 MEMBERS)	80
ATHLETICS	75
BADMINTON	79
BOWLS	81
CRICKET	85
CROQUET	91
FOOTBALL	88
GOLF	64
GYMNASTICS	99
HOCKEY	88
NETBALL	78
RUGBY UNION	97
SWIMMING	87

FACILITIES

HAVE HOME	%
NEW ZEALAND	76
ATHLETICS	80
BADMINTON	47
BOWLS	85
CRICKET	85
CROQUET	100
FOOTBALL	90
GOLF	100
GYMNASTICS	81
HOCKEY	30
NETBALL	50
RUGBY UNION	96
SWIMMING	73

OVER THREE QUARTERS OF PARTICIPATING SPORT CLUBS REPORT HAVING A "HOME" FACILITY, WHILE LESS REPORT OWNING IT OR SHARING IT

OWN HOME	%
NEW ZEALAND	41
ATHLETICS	20
BADMINTON	13
BOWLS	49
CRICKET	35
CROQUET	25
FOOTBALL	30
GOLF	67
GYMNASTICS	23
HOCKEY	20
NETBALL	8
RUGBY UNION	67
SWIMMING	0

SHARE HOME	%
NEW ZEALAND	51
ATHLETICS	70
BADMINTON	75
BOWLS	53
CRICKET	76
CROQUET	50
FOOTBALL	65
GOLF	11
GYMNASTICS	31
HOCKEY	83
NETBALL	92
RUGBY UNION	62
SWIMMING	82

SPONSORSHIP

SPONSORS OVER \$1000	
NEW ZEALAND	2.1
ATHLETICS	0.2
BADMINTON	0.2
BOWLS	1.4
CRICKET	2.3
CROQUET	0.7
FOOTBALL	2.7
GOLF	7.0
GYMNASTICS	0.5
HOCKEY	0.6
NETBALL	0.5
RUGBY UNION	10.0
SWIMMING	1.0

PARTICIPATING SPORT CLUBS
REPORT AN AVERAGE OF TWO
SPONSORSHIPS OF OVER \$1000 PER
YEAR

Sport club representatives were asked about which role within the club was most responsible for securing sponsorship. From the analysis, it emerged that clubs with multiple large sponsorship (i.e., over \$1000 per year) had a dedicated fundraising role rather than aligning it to a more traditional board/committee role such as treasurer or secretary.

MANAGEMENT

ABOUT 15% OF SPORT CLUBS
REPORT HAVING A PAID
ADMINISTRATOR FOR AT LEAST 15
HOURS PER WEEK

PAID ADMIN >15 HOURS PER WEEK	%
NEW ZEALAND	15
LARGE CLUBS (>300 MEMBERS)	42
SMALL CLUBS (<100 MEMBERS)	2
ATHLETICS	0
BADMINTON	6
BOWLS	8
CRICKET	0
CROQUET	5
FOOTBALL	28
GOLF	46
GYMNASTICS	63
HOCKEY	5
NETBALL	4
RUGBY UNION	18
SWIMMING	7

MANAGEMENT

CLUBS ARE MORE LIKELY TO BE IN
SURPLUS AND GROWING WITH A PAID
ADMINISTRATOR

FINANCIAL HEALTH %	LOSING MONEY %	BREAKING EVEN %	SURPLUS %
NEW ZEALAND	5	56	39
PAID ADMIN	6	48	46

MEMBERSHIP GROWTH %	SHRINKING %	STABLE %	GROWING %
NEW ZEALAND	23	32	45
PAID ADMIN	21	32	48

Sport club representatives were asked what else was noteworthy about management of their club. Successful clubs (i.e., those that are growing and in a financial surplus) reported running like a business.

GOVERNANCE

SPORT CLUBS REPORT
 BOARD/COMMITTEE TENURE OF LESS
 THAN 6 YEARS, 44% FEMALE
 MEMBERS AND 9% MEMBERS UNDER
 30

BOARD/COMMITTEE TENURE	YEARS
NEW ZEALAND	5.6
ATHLETICS	6.2
BADMINTON	6.1
BOWLS	6.1
CRICKET	6.8
CROQUET	4.2
FOOTBALL	4.5
GOLF	4.7
GYMNASTICS	3.3
HOCKEY	5.3
NETBALL	4.1
RUGBY UNION	6
SWIMMING	5.3

GOVERNANCE

BOARD/COMMITTEE FEMALE	%	BOARD/COMMITTEE UNDER 30	%
NEW ZEALAND	44	NEW ZEALAND	9
ATHLETICS	55	ATHLETICS	9
BADMINTON	42	BADMINTON	22
BOWLS	36	BOWLS	3
CRICKET	13	CRICKET	12
CROQUET	66	CROQUET	2
FOOTBALL	31	FOOTBALL	11
GOLF	27	GOLF	3
GYMNASTICS	90	GYMNASTICS	7
HOCKEY	53	HOCKEY	23
NETBALL	92	NETBALL	18
RUGBY UNION	24	RUGBY UNION	9
SWIMMING	69	SWIMMING	3

Sport club representatives were asked what else was noteworthy about governance in their sport club. Successful clubs (i.e., those that are growing and in a financial surplus) reported being open to new voices at the board/committee table.

VOLUNTEERS

THE AVERAGE NUMBER OF VOLUNTEERS
REPORTED AT EACH CLUB IS 31 WHICH IS
16% OF MEMBERS

NUMBER OF VOLUNTEERS AT SPORT CLUBS	#	AS % OF CLUB SIZE
NEW ZEALAND	31	16
ATHLETICS	21	16
BADMINTON	9	12
BOWLS	12	15
CRICKET	15	10
CROQUET	13	30
FOOTBALL	69	12
GOLF	24	7
GYMNASTICS	12	4
HOCKEY	18	12
NETBALL	19	17
RUGBY UNION	54	14
SWIMMING	13	10

DISCUSSION POINTS

WE ENCOURAGE DISCUSSION AND
EVOLVING STRATEGY AT SPORT CLUBS
RELATED TO THE FOLLOWING:

How membership is packaged
and priced to meet changing
wants and needs

Operational/facility models in
which space may be shared to
mutual benefit

Establish an understanding of
how "active" your members are
and how this could be improved

Consider whether a paid
administrator/manager is right in
your sport and club structure

Consider board/committee
tenure and how to increase
turnover

Consider the diversity on
boards/committees in your sport
and how it may be enhanced

Consider creative ways of how to
encourage volunteerism amongst
members

PROJECT TEAM

GORDON NOBLE-CAMPBELL

Gordon is the current chair of the NZASA, former director of the Hurricanes (Super Rugby) and former President of the Wellington Rugby Referees Association.

MICHAEL NAYLOR (PHD)

Michael is a Senior Lecturer in sport marketing at Auckland University of Technology. He is a member of the Sports Performance Research Institute New Zealand and director at the Sport Management Association of Australia & New Zealand.

MEL JOHNSTON

Mel is a PhD candidate at Auckland University of Technology with broad experience across New Zealand's sport sector. Mel's current research relates to major events and sport fans.

KATHARINE HOSKYN

Katharine is a PhD candidate at Auckland University of Technology with decades of experience across sport clubs and various not-for-profit contexts. Katharine's current research relates to club membership across Bowls and Golf in New Zealand.

AMBER CAMPBELL

Amber is an aspiring sport sector practitioner currently studying sport, recreation and business at Auckland University of Technology.

PLEASE DIRECT ALL QUERIES RELATED TO THE NATIONAL SPORT CLUB SURVEY TO ENQUIRIES@ASA.ORG.NZ



The NZASA was formed in 2017 to work collaboratively with all sporting codes in promoting, fostering, advancing and encouraging the core values of organised amateur sport, with the goal of ensuring there are opportunities, incentives and recognition for all participants, which are aligned to their distinctive status as amateurs. The Association's vision is for all New Zealand communities (urban and rural) to have viable and enduring amateur sporting bodies which are able to attract, engage, build and sustain membership based on each participant's and each community's unique needs.



**AUT SPORTS PERFORMANCE
RESEARCH INSTITUTE NEW ZEALAND**

The Sport Performance Research Institute New Zealand (SPRINZ) is New Zealand's number one rated sports research institute with a growing global reputation. SPRINZ is a group of dynamic and innovative researchers producing applied research in improving human health, sports performance and long-term athletic development. The SPRINZ Sport Leadership & Management Research Group is a founding partner of the National Sport Club Survey.