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# NATIONAL SPORT CLUB SURVEY

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## Reflection & Discussion

Wellington  
18 November, 2019

Auckland  
20 November, 2019

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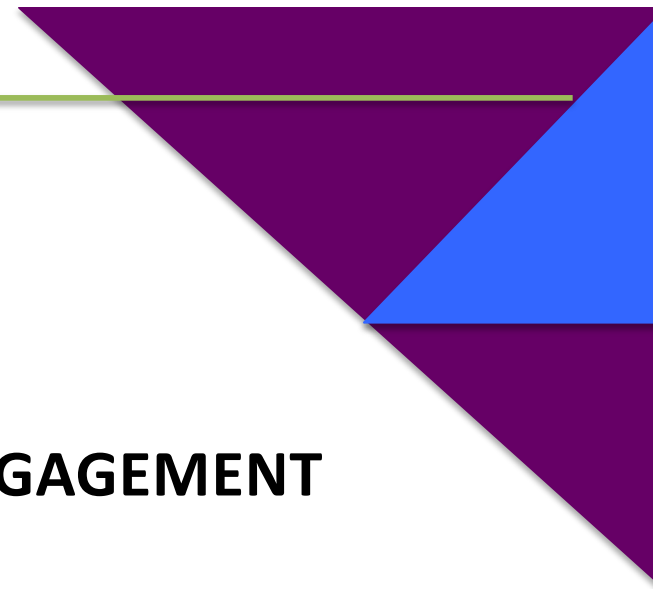


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**COMMUNITY ENGAGEMENT**

**THOUGHT LEADERSHIP**

**AMATEUR ADVOCACY**



Winner!

BURNSIDE INDOOR BOWLING CLUB

\$500 worth of apparel from Dynasty Sport



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# AUT SPORTS PERFORMANCE RESEARCH INSTITUTE NEW ZEALAND



<b>Leadership &amp; Management</b>	Kinesiology	Technology	Strength & Conditioning	Youth Development
Rugby Codes	Gym Sports	Physiology	Human Potential Centre	Nutrition



# Accessing & Interpreting Available Insights

The sport sector is **complex** with intertwined organisations

Lots of **Data and Insights** available that are potentially useful to those offering sport services to New Zealanders

Levels of analysis – sports, regions, organisations, clubs, individuals

A mix of paid professionals and volunteers gather and interpret data

More and more **dedicated positions** at regional/national level

Access what you can but don't rely too much on one source

**Synthesise** and consider **relevance** to your context

Allocate **Time** and **Discuss** with others to generate coherent strategy

How does your organisation or club manage this?

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# Insights-driven provision of sport to Kiwis



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# England Sport Club Survey (2018)

Closest overseas equivalent

1600 Responses

“far greater commitment to individual insight”



# 2019 National Sport Club Survey

## Database & Sample

Database constructed from web-based lists, liaising with RSOs and NSOs

5800 clubs invited in late September via email and social media

775 clubs responded across 70 Sports and all 16 Regions of NZ

The sport clubs of about 150,000 Kiwis captured in this project

Club representatives in varying roles completed questionnaires including presidents, chairpersons, secretaries

We estimate  
there are  
7000-7500  
sport clubs in  
NZ

Scaled items and open-ended questions about:

**MEMBERSHIP ♦ FACILITIES ♦ SPONSORSHIP**

**MANAGEMENT/GOVERNANCE ♦ VOLUNTEERS ♦ AMATEURISM**

**What's happening the wider sport sector at club level  
and how is this relevant to our sport/region/club?**

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# Clubs by region



Northland	34
Auckland	134
Waikato	76
BOP	50
Gisborne	4
Hawke's Bay	33
Taranaki	29
Manawatu / Wanganui	42
Wellington	94
Marlborough	11
Nelson	11
Tasman	6
West Coast	6
Canterbury	117
Otago	57
Southland	35

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# Clubs by sport

## LARGEST SUB-SAMPLES

Bowls (133)	Hockey (20)
Golf (55)	Cricket (20)
Football (34)	2 Sports (17)
Tennis (28)	3+ Sports (16)
Athletics (25)	Badminton (16)
Netball (24)	Gymnastics (16)
Rugby Union (23)	Swimming (15)
Croquet (22)	

## OTHERS

AFL	Aikido	Archery	Aviation	Archery	Basketball	Billiards
Boxing	Canoe / kayak	Cheer	Clay Shooting	Climbing	CrossFit	Curling
Cycle / MTB	Darts	Dragon Boating	Diving	Equestrian	Fencing	Floorball
Fishing	Frisbee	Gliding	Gridiron	Handball	Judo	Kart Racing
Lacrosse	Marching	Martial Arts	Motor Sport	Orienteering	Petanque	Pony Club
Rock Climbing	Roller Sports	Rodeo	Rowing	Rugby League	Sailing	Snow Sports
Softball	Squash	Surfing	Surf Lifesaving	Synchronized Swimming	Special Olympics	Table Tennis
Table Tennis	Tennis	Triathlon	Underwater Hockey	Waka Ama	Water Polo	Weightlifting
Yachting						

# Financial Health

<b>FINANCIAL HEALTH</b>	<b>Surplus %</b>	<b>Breaking Even %</b>	<b>Losing Money %</b>
<b>New Zealand</b>	<b>39</b>	<b>56</b>	<b>5</b>
Auckland	37	58	5
Wellington	30	60	10
Rural	40	55	6
Two Sports	35	53	12
Three + Sports	27	67	7
Large Clubs (>300 members)	43	54	4
Small Clubs (<100 Members)	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

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# Membership

Club Size	Members
<i>New Zealand</i>	<i>190</i>
<b>ENGLAND</b>	<b>257</b>
Auckland	257
Wellington	178
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

Cost of Adult Playing Membership	\$
<i>New Zealand</i>	<i>227</i>
<b>ENGLAND</b>	<b>215</b>
Auckland	350
Wellington	188
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

Shrinking Membership	%
<i>New Zealand</i>	<i>23</i>
<i>New Zealand 2018</i>	<i>22</i>
<b>ENGLAND</b>	<b>15*</b>
Auckland	27
Wellington	21
2 Sports	23
3 + 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

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# Membership

<b>Members Engaged at least once per Month?</b>	<b>%</b>
<i>New Zealand</i>	<b>80</b>
<i>New Zealand 2018</i>	<b>75</b>
Auckland	81
Wellington	75
Rural	80
Two Sports	77
Three + Sports	84
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

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# Membership

	<b><u>Successful Clubs</u></b> <b>(Growing + Surplus)</b>	<b><u>Stagnant &amp; Struggling Clubs</u></b> <b>(Shrinking/Stable + Losing Money/Breaking Even)</b>
<b>Attract New Members?</b>	Cohesive Community Strategy	Sometimes NO effort at all Contact Details posted at Club Newspaper
<b>Single Most Successful Membership Recruitment Tool?</b>	Word of Mouth Running Programs	Word of Mouth Running Programs
<b>Benefits Prospective Members Seek?</b>	Culture Family Environment	Competition Health & Well-Being
<b>Attract New Members in Future?</b>	Flexible Memberships Schools	Better Engage Community Diversify Schools

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# Membership Discussion Questions

Pricing is a sophisticated element in the marketing mix. What is happening in your sport around setting prices like membership fees in a strategic way?

How can regional sport organisations help clubs recruit new members?

How can clubs help themselves?

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# Facilities

Have Home	%
<b>New Zealand</b>	<b>76</b>
<b>New Zealand 2018</b>	<b>85</b>
Auckland	73
Wellington	77
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

Own Home	%
<b>New Zealand</b>	<b>41</b>
<b>New Zealand 2018</b>	<b>32</b>
<b>ENGLAND</b>	<b>19</b>
Auckland	37
Wellington	35
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	%
<b>New Zealand</b>	<b>51</b>
<b>New Zealand 2018</b>	<b>48</b>
Auckland	58
Wellington	53
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

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# Facility Discussion Questions

To what extent do clubs in your sport share facilities with another sport or other group?

What models of clubs sharing space work best?

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# Sponsorship

<b>Sponsors over \$1000?</b>	
<b><i>New Zealand</i></b>	<b>2.1</b>
Auckland	2.3
Wellington	1.8
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

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# Sponsorship

	<b><u>Sponsored Clubs</u></b> <b>(At least 2 x \$1K)</b>	<b><u>Clubs not sponsored at all</u></b>
<b>Role most responsible?</b>	Manager Fundraising Person	Secretary / Treasurer Other committee Member
<b>What do prospective sponsors want?</b>	Advertising Recognition Signage	Advertising Recognition Signage
<b>Single most important barrier?</b>	Time Competition	Time No one responsible
<b>Anything else noteworthy?</b>	Getting Harder Use personal contacts Use outside specialists	Membership fees and grants enough

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# Sponsorship Discussion Questions

What can less visible sports do to generate sponsorship revenue?

What role is there for national and regional sport organisations to assist clubs in this area?

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# Management

<b>PAID ADMIN &gt;15 HOURS PER WEEK</b>	<b>%</b>
<i>New Zealand</i>	15
<i>New Zealand 2018</i>	14
<b>ENGLAND</b>	<b>9</b>
Auckland	22
Wellington	12
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

<b>FINANCIAL HEALTH</b>	Losing Money %	Breaking Even %	Surplus %
<i>New Zealand</i>	5	56	39
<b>Paid Admin</b>	6	48	46

<b>MEMBERSHIP GROWTH</b>	Shrinking %	Stable %	Growing %
<i>New Zealand</i>	23	32	45
<b>Paid Admin</b>	21	32	48

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# Governance

Board / Committee Tenure	YEARS
<b>New Zealand</b>	<b>5.6</b>
Auckland	5.2
Wellington	5.4
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	6.0
Swimming	5.3

Board / Committee Female	%
<b>New Zealand</b>	<b>44</b>
Auckland	44
Wellington	44
Athletics	55
Badminton	42
Bowls	36
Cricket	13
Croquet	66
Football	31
Golf	27
Gymnastics	90
Hockey	53
Netball	92
Rugby Union	24
Swimming	69

Board / Committee Under 30	%
<b>New Zealand</b>	<b>9</b>
Auckland	12
Wellington	10
Athletics	9
Badminton	22
Bowls	3
Cricket	12
Croquet	2
Football	11
Golf	3
Gymnastics	7
Hockey	23
Netball	18
Rugby Union	9
Swimming	3

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# Management/Governance

	<b><u>Successful Clubs</u></b> <b>(Growing + Surplus)</b>	<b><u>Stagnant &amp; Struggling Clubs</u></b> <b>(Shrinking/Stable + Losing Money/Breaking Even)</b>
<b>Anything else noteworthy about the management / governance of your club?</b>	<p>Paid Admin/manager</p> <p>Run like a business</p> <p>Open to new voices at committee/board table</p> <p>Participate in the sport themselves</p>	<p>Fully volunteer based organization</p> <p>Difficult to recruit board members</p> <p>Time poor</p>

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# Management / Governance Discussion Questions

What is the current situation and future of paid admin support in your sport?

What is the current situation and future of women and young people on boards/committees in your sport?

What can regional and national sport organisations do to help with this?

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# Volunteers

Number of Volunteers at Sport Clubs	#	As % of Club Size
<i>New Zealand</i>	31	16
<i>New Zealand 2018</i>	30	-
<b>ENGLAND</b>	<b>37</b>	<b>14</b>
Auckland	26	10
Wellington	16	9
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

In ENGLAND, number of Volunteers per club **RISING** since 2011

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# Changes in Amateurism

- Increased prize money
- Greater emphasis on money
- More sports and so wider range of amateur opportunities

## Challenges

- Increased emphasis on elite, professional or performance development
- Difficulties with funding
- Fewer volunteers, smaller clubs, declining membership
- More regulation, emphasis on health and safety

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# Future of Amateurism

## Optimistic

A strong belief that amateurism would thrive or at least continue

*“Strong future, still the base of all codes”*

*“Always a place for the fun loving keen amateur”*

vs

## Pessimistic

Concerned about amateurism:  
“struggle”, “gloomy”,  
“dying”

*“It will probably slowly die out”*

*“Does not exist anymore. Once money is the end result, it cannot be amateurism.”*

The word “hopefully” often used

Survival is dependent on the **availability of volunteers and/or funding.**

**Declining participation** and/or club membership perceived as a threat to volunteerism and amateurism

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# Volunteers & Amateurism

## Discussion Questions

Does less sport club voluntarism in cities raise a red flag?

In your sport how old on average are volunteers and is there a younger group coming in behind?

How can amateur sport be balanced with the elite side of the sport which is more visible and people seem to prioritise?

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# Takeaways

Consider how membership is packaged and priced to meet changing wants and needs

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

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

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

Open discussions about board / committee tenure and how to increase turnover

Consider the diversity on boards / committees in your sport and how it may be enhanced – and overcome apathy to do it!

What is happening in your sport to encourage voluntarism at club level?

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Thank for your attendance  
and contribution today!



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