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Otago Community Trust

Sport and Recreation – Sector Scan and Review

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Project Control Group

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With Thanks To

- All those representatives of the sport and recreation sector who gave their time to be interviewed and respond in writing to a series of questions posed to them. A full list of the respondent organisations is attached as Appendix One. A special thanks to the Otago Community Trust Board for their participation in a project workshop.

Disclaimer

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Executive Summary

Background

The Otago Community Trust (OCT) is a significant supporter of the sport and recreation sector (the Sector). To maximise the effectiveness of its funding of the Sector, OCT has requested a scan of the sector to understand the current and anticipated future shape and state of sport and recreation.

The benefits gained from participation in sport and recreation are well documented. Sport and recreation can help:

- Encourage social and community interaction and engagement
- Improve concentration and learning
- Increase self-esteem and self-awareness
- Improve personal health and quality of life
- Increase the economic return within an area

Participation patterns in sport and recreation have changed over time. Some traditionally popular activities have seen declines in membership while other emerging activities are becoming more popular. A number of factors is driving this change, including:

- A desire by parents to keep their young children away from contact sport.
- An increasing desire to participate informally and at flexible times to address work and family commitments.
- Financial pressures impacting people's ability to commit to club memberships and pay facility and competition fees.

The demographic profile of the Otago region is changing, both in terms of numbers and ethnic diversity. Population growth is projected in most parts of the region, with much of this in the older age groupings. Increasing ethnic diversity may call for different activity offerings. As the demographics change, so will the demand for facility design to meet aging, gender and ethnic diversity needs. These changes will require sport and recreation activities that are appropriate, in spaces and places that are suitable. At the same time Sport NZ is targeting tamariki and rangatahi, given the decline in participation in these age groups.

Sport and recreation occurs at a range of settings. This report has offered insights into the settings most frequented for sport and recreation. OCT already supports many of these settings such as indoor facilities and pools, outdoor sports fields and pools and walkways and cycleways. This support is highly valued across the sport and recreation sector.

This report also considers the barriers to participation, for both adults and young people. These barriers vary across age groups and also for those who wish to be more active compared with those that do not wish to be more active, either because they feel they are active enough or are just not interested in being active at all. Many barriers to participation relate to a participants' personal circumstances which OCT can have little or no influence on, such as tiredness or other commitments like work and family. But there are also factors that increased physical activity could improve, such as a lack of motivation which may be influenced by an individual's mental health. There are some barriers that relate to affordability, transport difficulties and availability/location of facilities and even the weather, that OCT funding support could help to further reduce.

Suicide rates and mental health and developmental disorders appear to be quite high in the region, without any obvious explanation. Southern DHB may be able to shed some light on this which may

also help OCT to prioritise which barriers OCT wishes to prioritise, possibly in collaboration with others.

The Otago Community Trust has identified a series of priority communities stated as:

- Children and young people*
- Māori*
- Pasifika*
- Former refugees
- New Migrants
- Rainbow communities
- Those experiencing mental health issues
- People living with a disability*
- People living rurally or in isolation
- Those facing hardship

Those marked with an asterisk align with Sport NZ priorities.

While these communities have been identified by OCT as priority communities, funding applicants are not required to address how the needs of these priority communities will be met through the work they are proposing to undertake, whether it be facility or programme development or delivery.

The report found that:

Stakeholder feedback gained during the development of this report indicates a very high level of satisfaction with OCT, its people and processes.

People appreciated:

- The consistency of funding year on year.
- OCT's accessible and collaborative approach across all aspects of the Sector.
- OCT's equitable approach to fund small organisations and communities.

Some questioned:

- The rationale behind the amount they are funded.
- What they perceive as OCT's expectation to sustain what they are doing, but do new and different things without increased funding.
- Whether OCT would consider longer funding contracts to allow certainty for staff and consistent programme delivery.

From a strategic perspective, the current application processes are sound and specifically ask respondents questions around the connection of their application to the OCT's vision. However, a greater understanding of success could be gained if respondents were asked to link the purpose of grant funds received to their own Strategic Plan and OCT's priority communities.

From a reporting perspective:

- An outcomes focus is appreciated as it allows recipients to tell a meaningful story of what they have achieved.
- Some would appreciate some help to develop tools to measure success.

Recommendations

General funding recommendations

The Otago Community Trust should:

- Advocate for and be involved in the development of a regional sport and recreation facility plan
 - Once developed work collaboratively with councils, other funders and Sport Otago to support the implementation of it
- Consider additional collaborative opportunities with other funders where possible that target specific barriers and/or settings.
- Consider establishing a strategic relationship with Southern DHB to better understand the health issues facing the Otago Region that may act as barriers to being active, but could benefit from increased physical activity.
- Consider additional tagged funding to further reduce identified barriers to participate in the Otago area such as a specific travel fund to be available to OCT identified priority communities.
- Consider adding women and girls as a priority community.
- Consider longer term grants (such as 3 years) on a more regular basis to ensure continuity within organisations.
- Consider the impacts of an ageing population in terms of facilities, programmes and support.
- When investing in facility development ensure that these facilities will meet the needs of the OCT identified priority communities.

Application and reporting recommendations

The Otago Community Trust should:

- Seek alignment of projects with your own priority community groups for applications and reporting.
- Seek confirmation and evidence of alignment with applicant's Strategic Plans.
- Consider how the calculation of funding levels could be more transparent.
- Consider how expectations of organisations around sustainability can be managed, in an environment where sustainability is heavily reliant on third party funders.
- Consider offering training to those who receive significant grant funding on how to report on outcomes.
- Consider offering training and/or developing a tool for applicants to better measure success of their proposed outcomes.
- Consider different levels of reporting to reflect the level of funding. Smaller grants require less detailed reporting.

1.0 Introduction

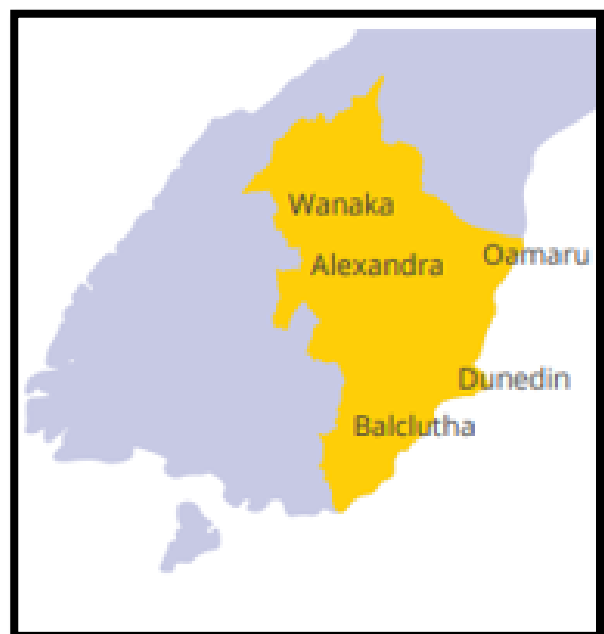
Having recently developed a 5-year Strategic Plan for 2022-2027 (the Plan), Otago Community Trust (OCT) is currently looking at how it can best respond to the needs of the sport and recreation sector (the Sector) across the area that it funds. OCT contracted RSL Consultancy to assist it with that process by undertaking an environmental scan of the Sector and how OCT fits within that.

OCT's funding area is defined is throughout Otago, covering:

- North Otago
- South Otago
- Central Otago including Wanaka

West Otago, Queenstown and Arrowtown are outside OCT's funding boundary.

OCT's boundary includes the territorial authority areas of Clutha District Council, Central Otago District Council, Dunedin City Council, Waitaki District Council and a portion of the Queenstown-Lakes District Council.



In the recently developed Strategic Plan the Otago Community Trust's vision is "Otago communities are vibrant and resilient, and protective of people, heritage and environment". OCT's 4 funding pillars represent the 4 strategic focus areas of granting. All four of these pillars can be realised through various forms of sport and recreation provision.

 <p>EMPOWERED COMMUNITIES</p> <p>Communities are strong, vibrant and resilient. They collaborate and share ideas and resources. They support volunteers and volunteering initiatives.</p>	 <p>IMPROVED HEALTH AND WELLBEING</p> <p>People have access to health and welfare services and are able to participate in recreation and leisure activities.</p>	 <p>INCREASED ACCESS TO OPPORTUNITIES</p> <p>All are valued for the contribution that they make. The region has a thriving economy that directly contributes to inclusive growth.</p>	 <p>THRIVING CHILDREN AND YOUNG PEOPLE</p> <p>All children and young people in Otago are valued, accepted and empowered to lead fulfilled lives. They are healthy, happy and their wellbeing is nurtured.</p>
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Through the Plan OCT has identified an extensive, although not exhaustive, number of priority communities:

- Children and young people*
- Māori*
- Pasifika*
- Former refugees
- New Migrants
- Rainbow communities
- Those experiencing mental health issues
- People living with a disability*
- People living rurally or in isolation
- Those facing hardship

Those marked with an asterisk align with Sport NZ's current investment priorities.

1.1 Methodology and scope

The following methodology was followed in the undertaking of this Sector scan and review:

- 1) Brief and methodology for the project agreed.
- 2) 72 stakeholders invited to either undertake one on one interviews or respond to emailed questions:
 - 20 interviewed
 - 16 responded by email.
- 3) A secondary data review was undertaken of all national and local data/research. This included data from Otago Community Trust (OCT), Sport Otago, Sport NZ, Stats NZ and the New Zealand Secondary School Sports Council.
- 4) The demographic profile of each local authority area in the OCT area was also completed.
- 5) To provide insights on the Sport and Recreation sector a secondary data review was distributed to the OCT Board and staff for their workshop, held on 26 October.
- 6) The workshop's purpose was to discuss barriers and settings along with initial findings from stakeholder feedback and to provide an overview of the participation and demographic profile of the region.
- 7) Findings from the workshop, Sector engagement and secondary data review collated into a Sector Scan and Review report.

This report should be read in conjunction with the Snapshot of Sport and Recreation in Otago.

2.0 The Sport and Recreation Sector

2.1 Sport, recreation and play

Sport is competitive by nature and generally has a local, regional, national and international structure to draw upon. Active recreation is inherently less structured than sport with participation occurring in a wider range of settings, often informally and is increasing in popularity. Play, also unstructured and informal; is undertaken by and generally lead by children under 18. Sport, recreation and play are all mechanisms that can be used for achieving wider benefits

2.2 The structure of the sport and recreation sector

The Sport and Recreation Sector (the Sector) is complex, with many organisations involved in supporting and delivering sport, active recreation and play opportunities across New Zealand. As Figure 2.1 shows, no single organisation engages across the breadth of the Sector. Different groups work at different levels across the Sector. The picture is no different in Otago, with Sport NZ, councils, Sport Otago, funders like OCT, RSO, clubs and many others supporting and delivering sport, active recreation and play.

Here is an indication of the different levels that Sport NZ, OCT and Sport Otago operate in:

Sport New Zealand

Sport NZ takes a national/regional approach, connecting with national sport and recreation organisations (NSOs and NROs) and regional sports trusts (RSTs) through investment and with other government agencies, councils and other funders through information sharing.

Otago Community Trust

OCT takes a regional/local approach working with the 5 councils across the Otago Region, RSTs, regional sports organisations (RSOs) where they exist, or NSOs in the absence of an RSO and schools. Sport and recreation grant funding from OCT is primarily into organisations that provide sport rather than active recreation opportunities, although wider funding into facility/amenity development and upgrades like pools, cycleways and trails does encompass recreational pursuits.

Active recreation: ‘non-competitive physical activity for the purpose of wellbeing and enjoyment.’

Sport NZ

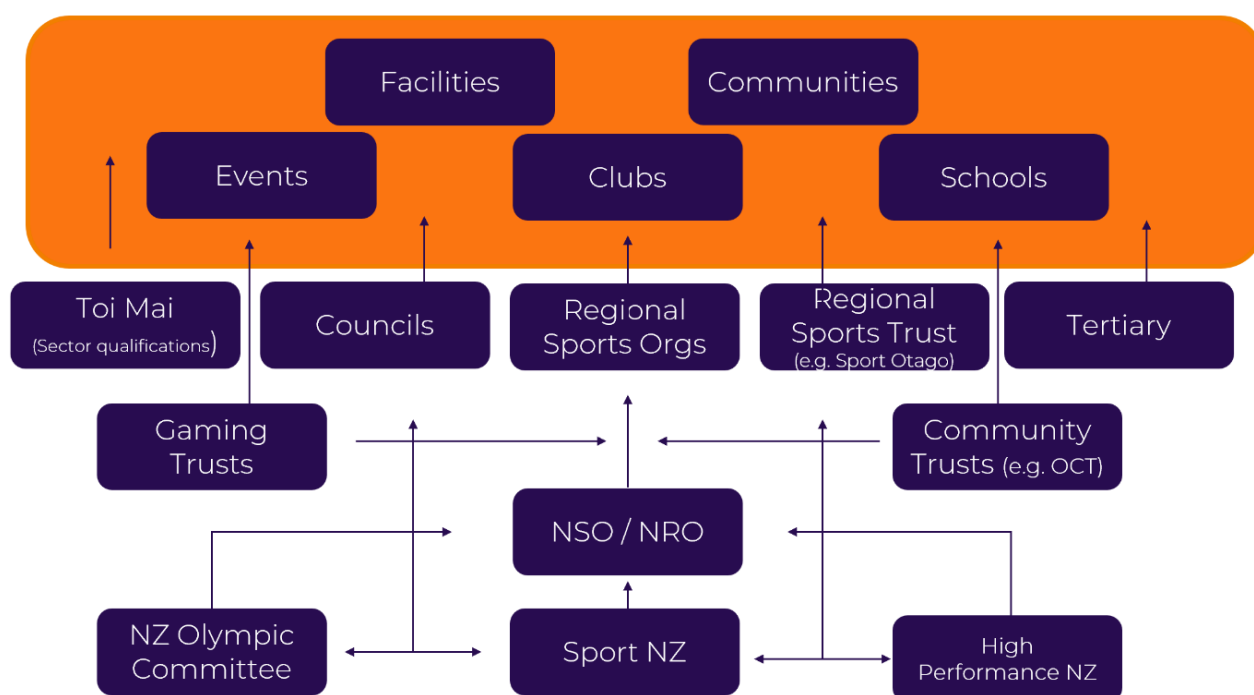


Sport Otago

Sport Otago takes a regional/local approach working with RSOs where they exist, councils, schools, clubs and funders such as OCT. While largely providing a facilitation, professional development and information sharing role, it also allocates a share of Sport NZ's Tū Manawa fund across the Otago Region.

Figure 2.1 shows the various components of the sector and how they relate to each other. Those shown in the orange box deliver sport, active recreation and play. Others hold a mix of sport leader, driver and support roles.

Figure 2.1: The Sport and Recreation Sector in New Zealand



2.3 Investment in the Sector

Millions of dollars are fed into the Sector every year to ensure New Zealanders can access a variety of sport, active recreation and play opportunities. Table 2.1 lists the key funders of the Sport and Recreation sector and their investment in 2019/2020. This data comes from a number of sources:¹

Table 2.1: Approximate Annual Investment in Sport and Recreation Sector in New Zealand

\$1.3billion	Local government
\$170m	Class 4 Gaming Trusts
\$20m	T.A.B.
\$20m	Community Trusts
\$85m	Lotteries Grants Board (incl. \$65m to Sport NZ)
\$116m	Sport NZ (funding from Central Government/ Lotteries)

¹ Data provided by Sport NZ

The Otago Community Trust

OCT distributes funds to support the Sector through a number of different funding categories, with the amount varying year on year depending on the demand in the various categories. While not able to accommodate all applications, or of those funded, to the level sought by applicants, the contribution to the Sector is significant. The table below gives a breakdown of how much was distributed by OCT in the different funding categories in the 2018/2019-2020/2021 financial years.² Funds are typically distributed for facility development and enhancement, programmes, events and equipment across a number of agencies, including local councils, schools, national and regional sports organisations, regional sports trusts, youth development and disability organisations and clubs.

Table 2.2: Funds Distributed by OCT to Support Sport and Recreation in the Otago Region.

Funding Sector	Funds Distributed 2018/2019	Funds Distributed 2019/2020	Funds Distributed 2020/2021
Sport and Recreation	2,174,309	2,607,086	1,613,396
Learning	134,090	329,314	673,239
Environment and Heritage	1,845,789	500,000	187,297
Community	1,584,800	147,537	621,850
TOTAL	\$5,738,988	\$3,583,987	\$3,095,782

The following table gives a breakdown of funds distributed directly to codes by OCT through the Regional Sport Grant scheme in 2019 and shows what level of participation there is in each of those codes in Otago across adults (18 plus), tamariki (5-11) and rangatahi (12-17).³

Table 2.3: Participation Levels in Otago in Codes and funding by OCT.

Code in Order of OCT Level of Regional Sport Grant Approval (2021)	% level of participation by adults (18+)	% level of participation by 5-11 year olds	% level of participation by 12- 17 year olds
Netball* (\$110k)	5	11	17
Football* (\$82k)	7	19 +	13 +
Hockey* (\$67k**)	2	4	8
Basketball* (\$65k)	4	4	17
Crickets (\$60.4k)	4	8	6
Rugby (\$55k)	2	12	12
Touch (\$40k)	4	4	13
Snow Sports (\$40k)	13	1	3
Rowing (\$30k)	2	-	4
Golf (\$27.5k)	12	1	1
Athletics (\$27k)	1	3	13
Rugby League (\$25k)	0	-	5
Softball (\$18k)	0	0	2
BMX (\$13k)	1		

² Data provided by OCT

³ Sport NZ Active NZ Survey 2019

Code in Order of OCT Level of Regional Sport Grant Approval (2021)	% level of participation by adults (18+)	% level of participation by 5-11 year olds	% level of participation by 12-17 year olds
Cycling	33 ^	45	30
Curling (\$12k)	-	-	-
Gymsports (\$7k)	1	10	10
Trampolining	-	36	14
Table Tennis (\$5k)	7	2	5

*Includes franchise team ** Otago Hockey \$52k, Central Otago Hockey \$15K

+ includes futsal (indoor football)

^ Adult cycling numbers exclude BMX

Sport New Zealand

The table below details Sport NZ's contribution to the Sector in 2020/21. While the COVID Recovery Fund was a one off, approximately \$116m is invested into the Sector by Sport NZ on an annual basis.

Table 2.4: Level of Investment by Sport NZ for 2020/21⁴

Partnerships	Funds	Programmes
Regional Sports Trusts (\$13m)	Rural Travel Fund (0.4m)	Regional Sports Directors (\$1m)
National Sport Organisations (\$9.3m)	Tū Manawa (\$8.485m)	He Oranga Poutama (\$1.8m)
National Education Organisation (\$0.17m)	Women in Sport (\$0.8m)	Play.Sport (\$1.2m)
National Disability Organisations (\$1.2m)	Inclusion Fund (\$1.2m)	Business Capability Support (\$1.2m)
National Recreation Organisations (\$1.3m)	COVID Recovery (\$265m)	Healthy Active Learning (\$4.6m)
High Performance Sport NZ (\$66m)		Water Safety (\$2.5m)

2.4 What benefits the Sector can deliver

The Sector contributes \$4.9 billion or 2.3% to New Zealand's GDP. It employs more than 53,000 New Zealanders. It contributes 4.2% of GDP to Otago's economy or \$328.2m.⁵

Sport NZ's Value of Sport⁶ research undertaken in 2017 reaffirmed the view that participation in sport and active recreation can have positive impacts on a number of physical and mental health conditions for both adults and children, including reducing the rates of Type 2 diabetes, high blood pressure, cardio-vascular disease, obesity related disorders, some cancers such as breast and colon cancer and for at least managing, if not preventing some mental health disorders such as depression, anxiety and dementia.

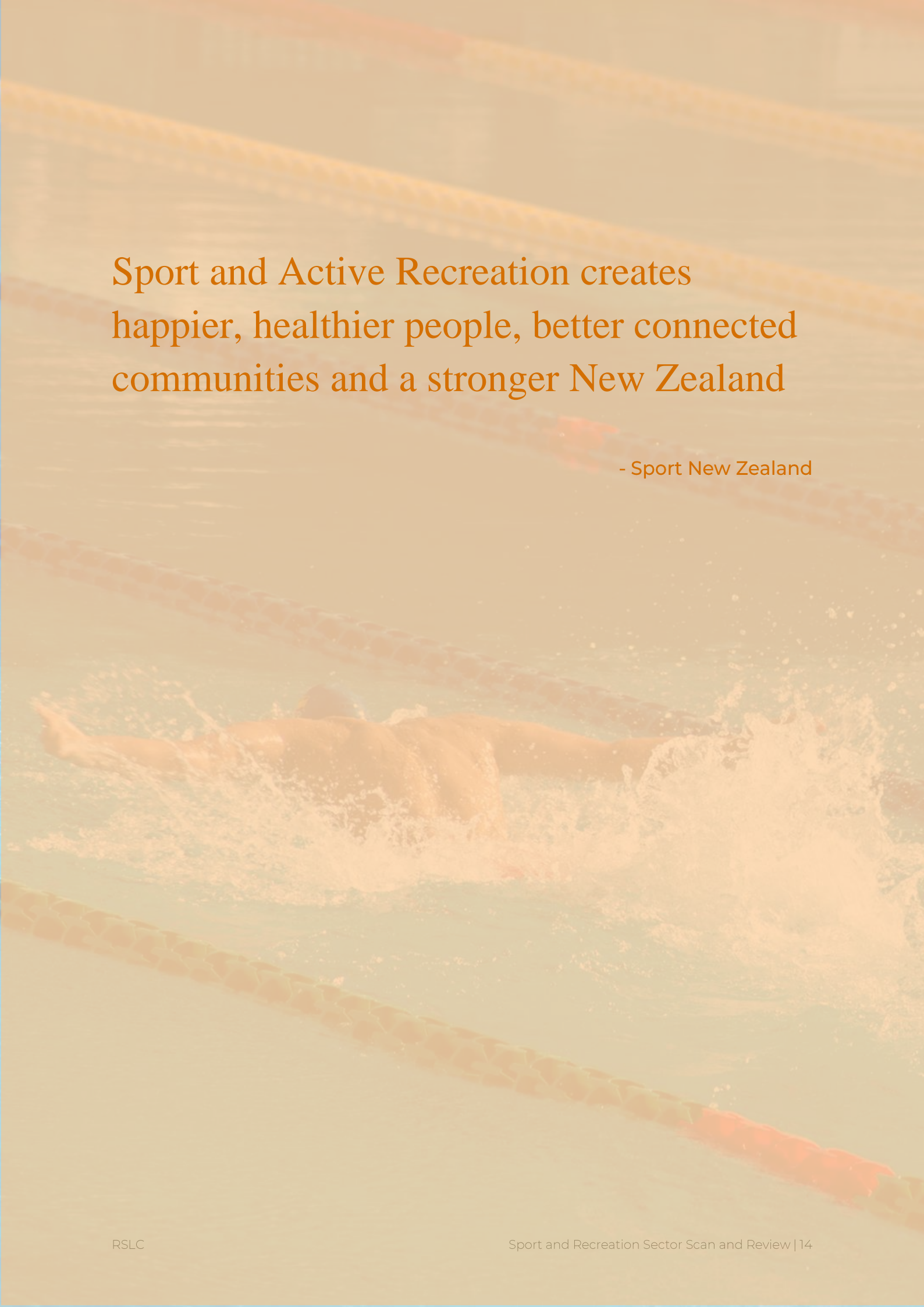
⁴ Sport New Zealand briefing to incoming Minister 2020.

⁵ Sport NZ Value of Sport Research 2013.

⁶ Undertaken by Angus & Associates

Figure 2.2: Value of Sport Survey 2017 – Key Findings

92%	Agree being active keeps people physically fit and healthy.
85%	Agree that being active keeps their children physically fit and healthy.
84%	Agree that many essential life skills are learned playing sport.
89%	Agree that being active relieves stress and is good for mental health.
73%	Agree that sport and other physical activities help build vibrant and stimulating communities.
72%	Agree sport and other physical activities generate economic benefits for New Zealand.
68%	Agree sport and other physical activities generate economic benefits for communities.



Sport and Active Recreation creates
happier, healthier people, better connected
communities and a stronger New Zealand

- Sport New Zealand

3.0 Otago Demographic Profile and Participation in Sport and Recreation

This section provides a summary of the key population patterns of the Otago Region and looks at participation in sport and recreation across the different demographic profiles. The accompanying “Snapshot of Sport and Recreation Otago” provides more detailed population data for each of the council regions that OCT funds.

3.1 A Snapshot of Otago’s demographic profile



The population of the Otago Region in 2018 was approximately 235,000



The population of the Otago Region is projected to increase by nearly 48,000 people between 2018 and 2048 (20%).



The estimated median age for people in the Otago Region in 2018 was 38.2 years.



While the Queenstown Lakes area that OCT funds is projected to experience the largest growth to 2043 (57%), Dunedin will remain by far the largest populated centre in the Otago Region.



The population of Otago is ageing. The number of those aged 60 years and over is expected to increase by 72% between 2018 and 2048.



While the population of the Otago Region is predominantly of European descent the population is projected to become more ethnically diverse.



The rate of disability increases with age; however all age-groups have people who have disabilities.

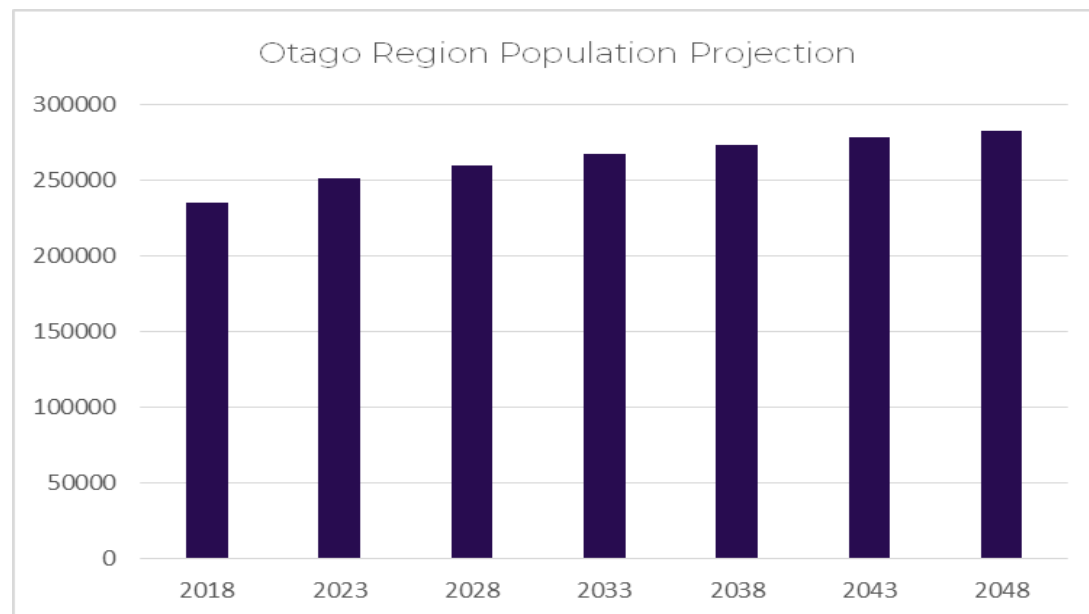


The suicide rate in the Southern DHB region was significantly higher than the New Zealand average from 2015–2018.

3.2 Population projections

The population of the Otago Region is forecast to increase by 20% between 2018 and 2048 from 235,000 residents to 282,600.

Figure 3.1 Otago Region Projected Population Growth 2018 – 2048



Source: Stats NZ- mid-series projections

3.3 Key growth areas

Table 3.1 identifies the projected population changes over the 25 years between 2018 and 2043 of the five sub regions in the Otago district. Four of the regions are expected to experience growth, the most significant being QLDC⁷ with projected growth of 57% by 2043. Central Otago is expected to grow by 15% while the Waitaki District and Dunedin are expected to experience moderate growth of 8% and 6% respectively. The Clutha District is expected to see a decline in population of 6%.

Table 3.1: Projected Otago Region Growth Areas

Projection	2018	2023	2033	2043	change 2018-2043	% change 2018-2043
Central Otago	20,500	21,400	22,900	23,600	3,100	15%
QLDC*	12,540	14,640	17,370	19,720	7,180	57%
Clutha	17,600	17,550	17,300	16,500	-1,100	-6%
Waitaki	22,300	22,800	23,600	24,100	1,800	8%
Dunedin	129,000	132,000	267,000	136,500	7,550	6%

Source: Stats NZ- mid-series projections

⁷ QLDC refers to Wanaka, Hawea and Matukituki only.

3.4 Active New Zealand Survey 2019

Sport NZ's Active NZ Survey is a randomised online survey of both adults (18+) and young people (5-17) that is distributed on a monthly basis throughout New Zealand. Over 90,000 New Zealanders responded to the survey between 2016 and 2019. Monthly distribution of the survey ensures seasonal code and weather conditions are captured in people's participation feedback. In 2019 21,689 adults (18 plus) were surveyed, 1,166 of them were in Otago. A total of 4,755 young people (5-17) were surveyed, 225 of them were in Otago. While the numbers confirm this is not a comprehensive survey of what everyone in Otago is doing, it does provide an indication of what is happening in Otago. Other data sources such as the Sport NZ Insights Tool have been used to consider what activities people are participating in. The Insights Tool taps into Stats NZ, Ministry of Health and Ministry of Education data sources, as well as the Active NZ survey.

While the Active NZ Survey does give a breakdown of data across a breadth of age clusters, other than those we have identified and different ethnic groups, the data sets, particularly for the young people clusters and ethnic groups are of limited benefit as the sample size is very small, and therefore not statistically robust. Accordingly, they have not been broken down further in this report. The Sport NZ Active NZ Survey does not give a breakdown between urban and rural participation. The Sport NZ Insights Tool uses Stats NZ mesh blocks to identify specific areas within any given region, but the data is still reliant on the number of respondents to the Sport NZ Active NZ Survey. Because those numbers are relatively low, there appears to be no discernible difference between levels of participation and activities people participate in across the Otago Region.

*94% of 5-17-year-olds and
74% of adults in Otago
reported participating in
sport and recreation in the
last 7 days*

Active NZ Survey - 2019

Of those from Otago surveyed by Sport NZ in 2019,⁸ 94% of those aged 5-17 years old and 74% aged 18 plus, reported being active for the purposes of sport and recreation in the 7 days prior to the survey. This compares well with the national average which sat at 95% for those aged 5-17 and 73% for those 18 plus.

3.5 What activities people in Otago are participating in

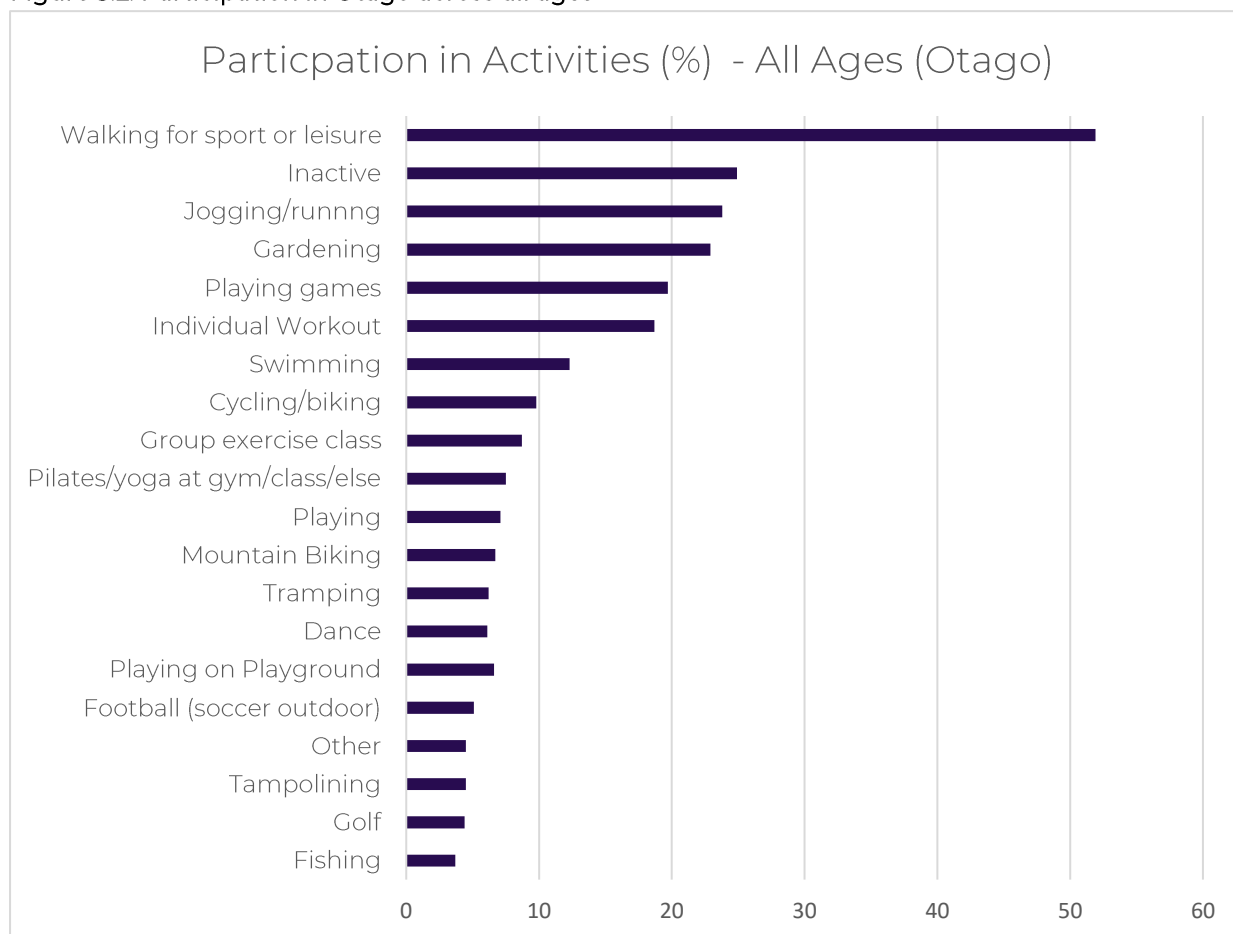
The following 3 graphs developed using Sport NZ's Insights Tool list the top 20 activities undertaken in Otago in order of their popularity. In 2019 many reported doing more than one of these activities over the last 7 days.

Figure 3.2 below illustrates the trend identified by Sport NZ that there is a growing interest in less formal active recreation and decreasing interest in highly organised competitive sport. People are preferring activities which can be undertaken at a time which suits them, either as individuals or in informal groups.

Technology is now also playing a significant part in providing the medium for people to discover new activities, groups and challenges. Participants can participate in online activities, when they like without the commitment of needing to join a club for a period of time and participate at the time dictated by the sport.

⁸ Active NZ Survey 2019

Figure 3.2: Participation in Otago across all ages⁹



While fewer than 10 of the activities OCT funds through the Regional Sports Grant scheme appear in these lists, many of the other activities are supported by OCT through funding into built infrastructure such as facilities, walkways and cycleways. The accompanying Snapshot of Sport and Recreation in Otago document shows the breakdown for each of the districts OCT funds.

Figure 3.3 below shows that children aged 5-12 years prefer activities involving play. Three of the top four activities participated in by this group involve play. As with the population as a whole, activities which can be carried out as individuals are very prominent, the top 10 are all activities which can be undertaken individually or in informal groups. Organised sports are undertaken by this group but are less popular than casual, individual activities.

⁹ Source: Sport NZ Insights Data

Figure 3.3: Participation in Otago by 5-12 year olds¹⁰

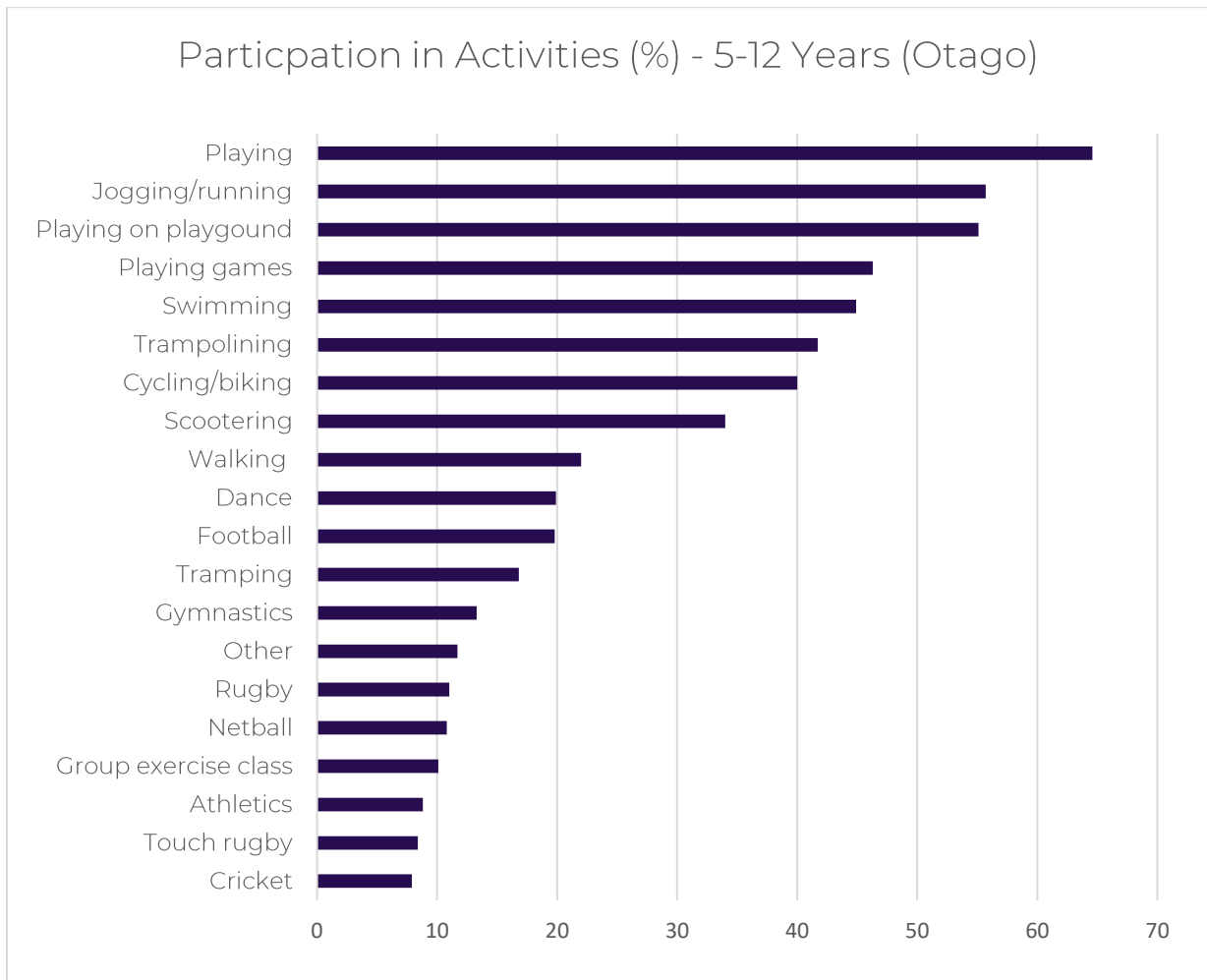
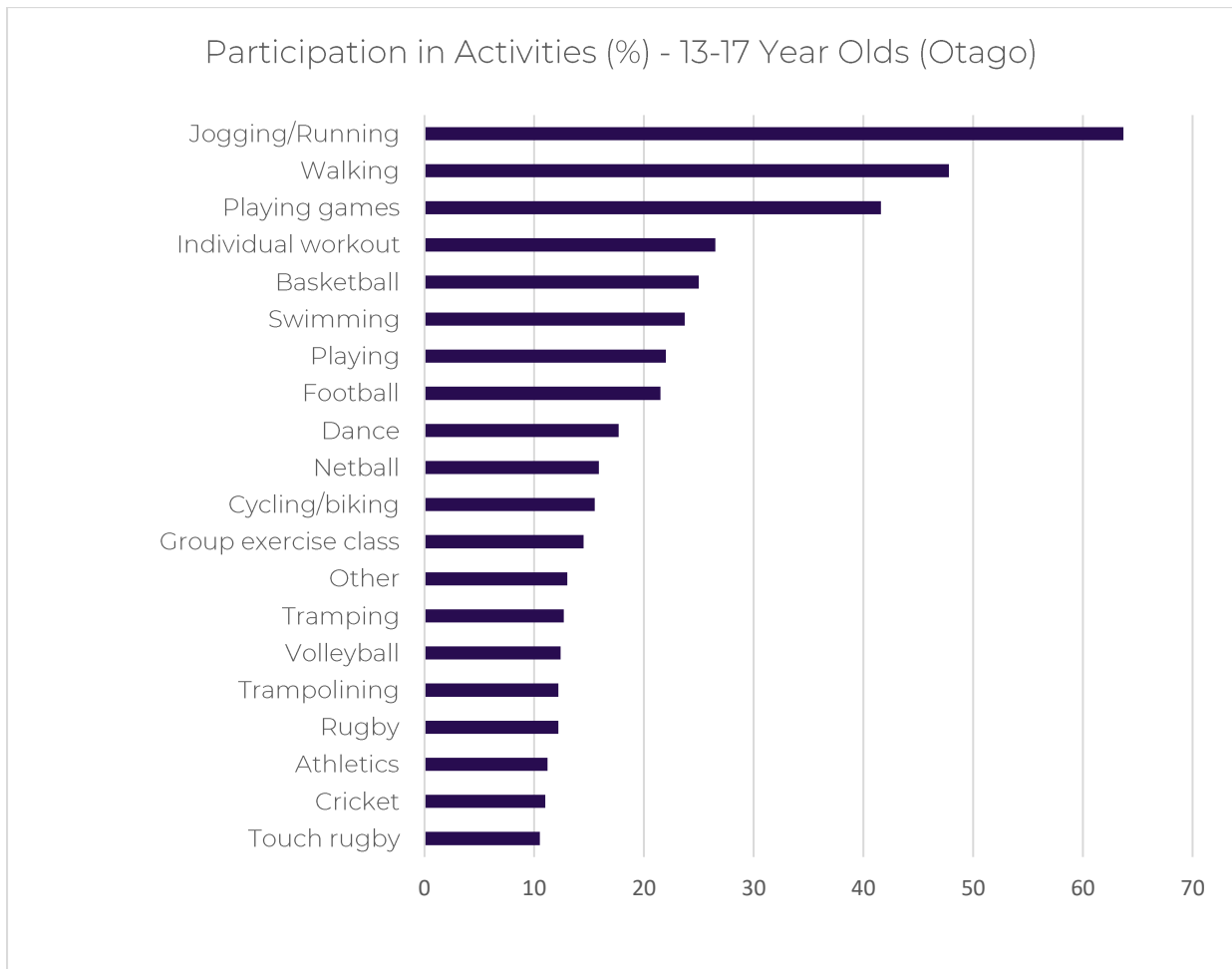


Figure 3.4 shows that activities which can be carried out individually and/or informally are prominent in the top 10 for 13 to 17 year olds as is the case for the younger age group. However organised, competitive activities such as traditional sports like basketball, football and netball are more evenly spread in the top 20 preferred activities than in the 5-12 year age group.

¹⁰ Source: Sport NZ Insights Data

Figure 3.4: Participation in Otago by 13-17 year olds¹¹

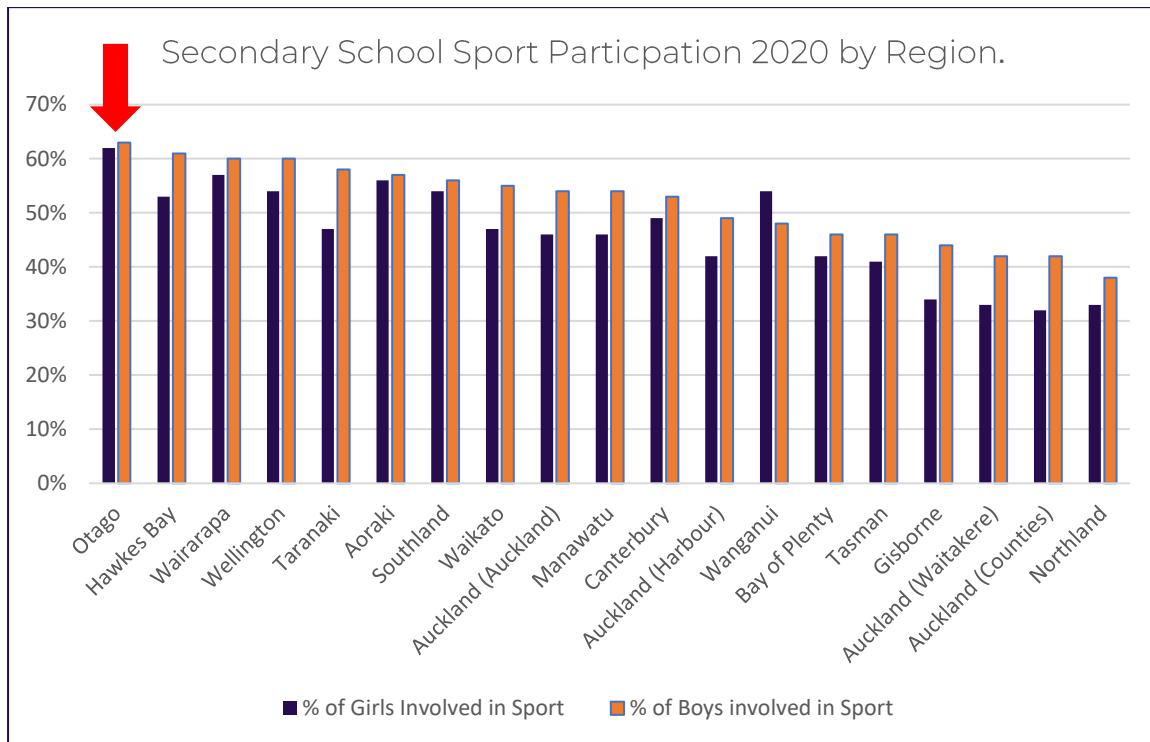


While recreation activities are generally more popular with young people than traditional sport, data collected by the New Zealand Secondary Sports Council records Otago as having the highest level of participation in secondary school sport in New Zealand for both boys and girls.¹²

¹¹ Source: Sport NZ Insights Data

¹² Note, this NZSSC census data only measure those that have been involved in formal, organised sport for a meaningful period. It does not capture informal activity.

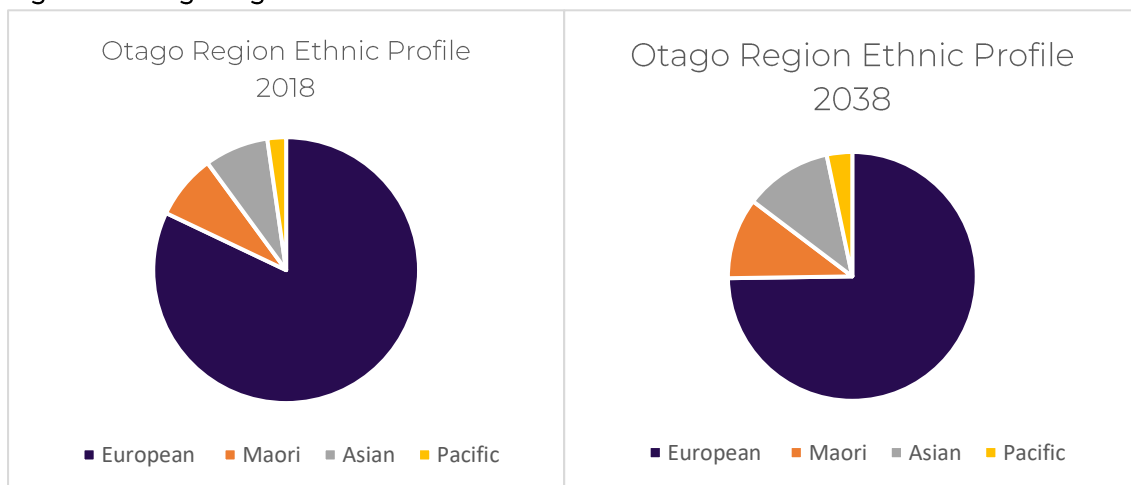
Figure 3.5: Secondary school sport participation in Otago by gender¹³



3.6 Ethnicity of the Otago Region population

The large majority (87%) of residents in the Otago Region in 2018 were of European descent. By 2038 this is expected to decline to 82%. In this period, the proportion of Māori residents and those identifying as Asian are both projected to increase from 8% to 12%. In 2038 the combined proportion of non-European residents that is, those identifying as Māori, Pacific or Asian will be 28%, up from 18% in 2018. An increasingly diverse population is likely to impact on the type of activities being sought across the region and increase demand for funding in activities such as waka ama that is becoming increasingly popular with both Māori and non-Māori and indoor sports such as table tennis and badminton.

Figure 3.6 Otago Region and Districts Ethnic Profile 2018 and 2038



¹³ NZSSSC Census 2021

While ethnic participation data for Otago is available in the Sport NZ Active NZ Survey 2019, the respondent numbers in all but the NZ European category make the data statistically unreliable so they not been covered off in this report.

3.7 Proportion of the population with a disability

Some 24% of New Zealanders identify as being disabled, with 11% of New Zealand children under the age of 15 having a disability.¹⁴ While the rate of reported disability increases with age, it is important to note that all age-groups have people with disabilities. District level breakdowns of Disability, by age, are available in the Snapshot document. With an increase in the number of older adults there will most likely be a corresponding increase in those who report having a disability. This will need to be a key consideration in how the OCT supports priority communities in the future.

Sport NZ has recognised both in its 2019 Disability Plan and 2021 Active Recreation for Rangatahi Plan that young people with disabilities, particularly those with intellectual disabilities are disadvantaged when it comes to finding opportunities to participate in sport, active recreation and play. This confirms the findings of a piece of research undertaken by the Halberg Trust in 2020.¹⁵ 11% of those surveyed were from Otago/Southland. That research found, of those surveyed, 48% of tamariki and 62% of rangatahi had faced barriers to participation. This is worth noting, particularly when the feedback from those surveyed who were active, shows that if they start in a safe, encouraging participatory environment they are more likely to have a positive experience. They also report improved self-confidence, empowerment to take up opportunities in mainstream sport, connection with peers and confidence to establish more connections.

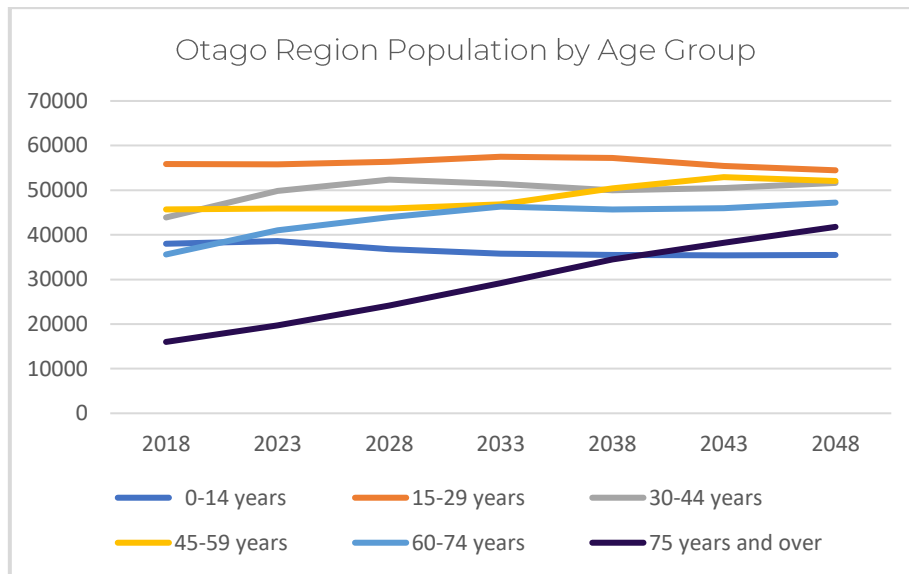
3.8 Otago's Ageing Population

Otago, like much of the Western World, has an ageing population. Figure 3.7 outlines the significant growth in those aged 60 years and over. Of most note is the growth in those aged over 75 years, increasing from 16,000 in 2018 to around 42,000 by 2043. These age group changes will have significant impacts on the provision of facilities and programmes being sought for sport and recreation. While not a priority group for Sport NZ they do make up a significant part of Otago's population and should be considered in facility and programme design.

¹⁴ Sport NZ Disability Plan – Play, Active Recreation and Sport 2019.

¹⁵ Halberg Youth Voices Report, September 2020.

Figure 3.7 Otago Age Group Profile Projections



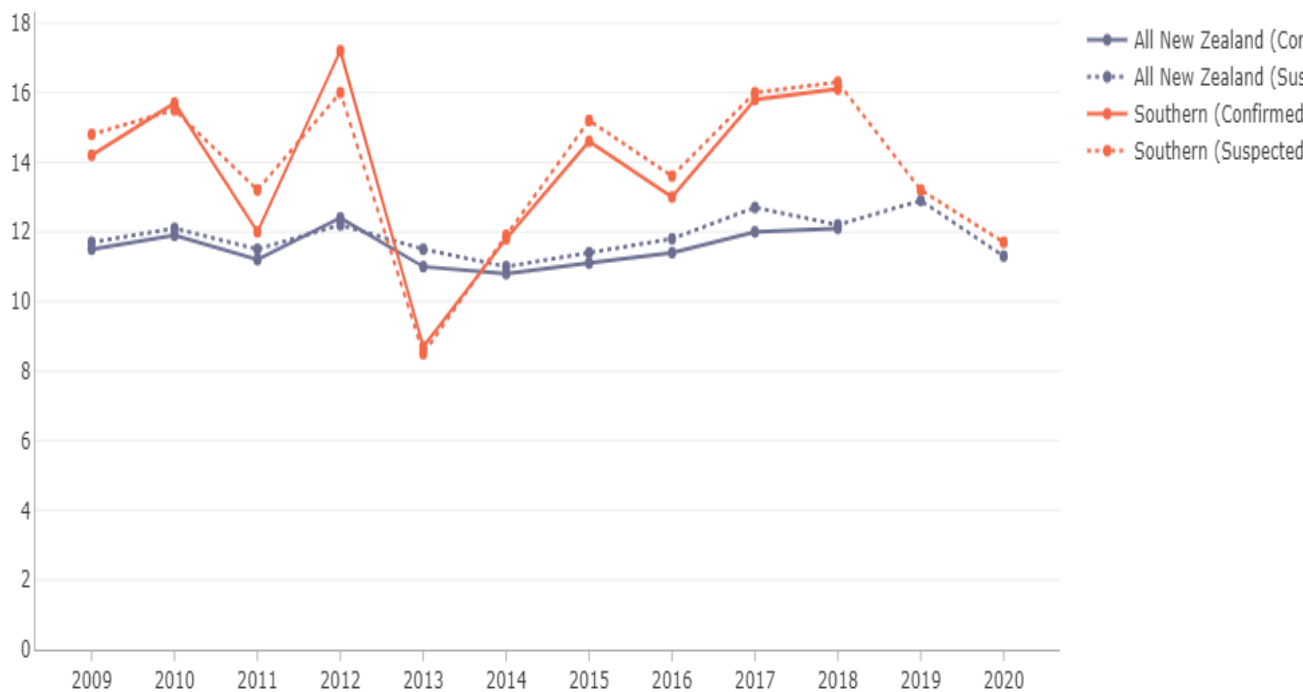
3.9 Otago's Mental Health Statistics

While mental health can benefit from physical activity and is recommended by both the Mental Health Foundation and Ministry of Health to manage mental health issues, it is also something that can cause some of the barriers to participation such as tiredness and lack of motivation. The graph below shows that the rate of suspected suicides in the Southern DHB Region aligned with all New Zealand in 2019 and 2020.¹⁶ But from 2014-2018¹⁷, both the rate of suspected and confirmed suicides in the Southern DHB region were considerably higher. Unfortunately no explanation is given for this. Southern DHB may be able to shed more light on this, particularly any differences between the Otago and Southland.

¹⁶ Ministry of Health Suicide Data for the Southern Region

¹⁷ No Data for the rate of confirmed suicides is available post 2018

Figure 3.8 Comparison of Suicide Rates



Further investigation of Ministry of Health data relating to mental health and development disorders in the Otago Regional Council region shows that the rates for 15-24 year olds are higher compared to the national rate across all but one reported condition, whereas the rates for 10-14 year olds are lower in all but one condition.¹⁸ Details can be seen in Appendix Two.

¹⁸ Ministry of Health, Health Survey 2017-2020, Regional Update - Otago

4.0 Settings and Barriers

4.1 Settings where people participate in sport and recreation

As part of the Active NZ Survey, Sport NZ asks the survey respondents where they undertake their sport and recreation activities. Not surprisingly these vary depending on the type of activity, but also whether the participants are adults, or school aged children where school is the primary place they participate, particularly in sport. OCT funding already supports the development of a number of these settings and this was recognised as a crucial role in the funding landscape by those interviewed in the preparation of this report. The following 2 tables show the percentage of those participating in the different settings for adults (18 plus) and young people (5-17).

Table 4.1: Settings where adults (18 plus) participate in sport and recreation

Setting	All NZ Adults (18+)	All Otago Adults (18+)	Otago Male Adults	Otago Female Adults
At home	39%	41%	36%	44%
Indoor Facilities (e.g. pools, gyms, indoor courts)	32%	30%	24%	36%
Outdoor Built (e.g. footpaths, cycleways, sports fields, ski fields, pools)	49%	52%	48%	56%
Outdoor Nature (e.g. beach, lake, sea, river, off-road bike/ walking tracks)	38%	41%	36%	47%

Table 4.2: Settings where young people (5-17) participate in sport and recreation

Setting	All NZ Young People (5-17)	All Otago Young People (5-17)	Young Otago Males (5-17)	Young Otago Females (5-17)
At school or in the school grounds	71%	70%	74%	66%
At home	63%	67%	70%	64%
Outdoor Built	60%	62%	59%	65%
Indoor facilities	52%	52%	41%	65%
Outdoor Nature	50%	57%	52%	64%

The tables highlight that people participate in sport and recreation in a range of settings and that the provision of facilities, be it indoor or outside, are key enablers to participation away from home. Some settings are more popular for Otago participants, when compared with the rest of New Zealand. Outdoor settings, either built or natural appear more popular, possibly reflecting the abundance of spaces and places available in Otago to participate. Young Otago participants also report the home setting as being a place where they participate more than the rest of New Zealand. This may reflect the more rural nature of the area.

4.2 What more could OCT do to enhance these settings

OCT has a valued history of funding into both indoor and outdoor settings, such as pools, indoor courts and ice facilities, artificial sports turf and trails for walking, running and cycling. However, at the OCT workshop on 26 October 2021, the OCT Board and staff discussed what more they could do to enhance the settings people participate in throughout Otago. The following suggestions were made:

- Support the development and implementation of a regional sport and recreation facilities strategy:
- Support the development of more multi-use indoor facilities that align with the regional strategy and meet the needs of OCT's priority communities.
- Work with local councils and other landowners to be more innovative about multi-use outdoor areas:
 - Investigate the installation of outdoor exercise equipment for adults along trails and around parks, provided there is evidence to suggest such equipment is used in other areas.
 - Promote deconstructed playgrounds to encourage unstructured play by tamariki.
- Where appropriate, support refurbishment of existing /well used facilities, particularly in rural communities, to ensure they are not lost.

4.3 Barriers to participation

As part of the Active NZ Survey, Sport NZ asks the survey respondents what barriers there are to them being more active. They ask the question of both those who identify as not doing as much activity as they want to do, but also of those who do not want to do any more than they already are. Some of the latter group would fall into the inactive category. In Otago that amounts to 6% of those aged 5-17 and 26% of those aged 18 plus.

Many barriers to participation relate to a participants' personal circumstances which OCT can have little or no influence on, such as tiredness, other commitments like work and family or lack of motivation. But there are some that relate to affordability, transport difficulties and availability/location of facilities and even the weather, that OCT funding support could help to reduce.

The following series of tables set out the various barriers reported by those wanting to do more activity, in the first instance, both by gender and age and then those not wanting to do more.

Table 4.3: Barriers to participation for those adults (18+) who identify as wanting to be more active

Barriers	All NZ Adults	Otago Adults	Adult Otago Males	Adult Otago Females
Other commitments are taking priority (e.g. work, family)	68%	71%	71%	71%
I'm too tired or don't have the energy	30%	29%	22%	35%
I struggle to motivate myself	30%	30%	26%	33%
The weather	17%	20%	20%	20%
The activity of my choice is too expensive	16%	13%	8%	17%
The activity of my choice doesn't fit my routine	14%	14%	14%	14%

Barriers	All NZ Adults	Otago Adults	Adult Otago Males	Adult Otago Females
No places nearby to do what I want to do	8%	7%	6%	8%
I have no transport to get to places	4%	4%	3%	5%

Table 4.4: Barriers to participation for those young people (8-17) who identify as wanting to be more active

Barriers for 8-17 year olds	All NZ Young People	Otago Young People	Otago Males	Otago Females
Too busy	43%	49%	38%	64%
I'm too tired/I don't have the energy	20%	19%	18%	19%
I prefer to do other things	14%	9%	8%	11%
It's too hard to motivate myself	20%	17%	16%	18%
The weather	13%	23%	23%	23%
My family can't afford it	15%	7%	5%	9%
Too hard to get to training, games or competition	14%	15%	12%	18%
No places nearby to do what I want to do	15%	22%	23%	20%
Can't fit it in with other family member's activities	13%	14%	14%	15%
I don't have the equipment I need	14%	13%	15%	11%
I have no one to do it with	12%	21%	25%	15%
I don't want to fail	6%	14%	21%	4%

Table 4.5: T Barriers to participation for those adults (18+) who identify as not wanting to be more active than they already are

Barriers for Adults	All NZ Adults (18+)	All Otago Adults	Adult Otago Males	Adult Otago Females
I already do a good amount of physical activity	52%	52%	55%	50%
Other commitments are taking priority (e.g. work, family)	31%	34%	38%	27%
I'm too tired or don't have the energy	11%	11%	15%	7%
I struggle to motivate myself	6%	8%	12%	4%
The weather	5%	5%	5%	7%
The activity of my choice is too expensive	3%	3%	4%	#%

Barriers for Adults	All NZ Adults (18+)	All Otago Adults	Adult Otago Males	Adult Otago Females
The activity of my choice doesn't fit my routine	3%	3%	6%	1%
There are no appropriate facilities or places conveniently located to do what I want to do	2%	3%	3%	2%
I have no transport to get to places	3%	4%	4%	4%

Table 4.6: Barriers to participation for those young people (8-17) who identify not wanting to be more active than they already are

Barriers for 8-17 years olds	All NZ Young People	All Otago Young People	Otago Males	Otago Females
I already do a good amount of physical activity	48%	54%	41%	65%
Too busy	32%	27%	14%	38%
I'm too tired/I don't have the energy	19%	27%	19%	32%
I prefer to do other things	23%	37%	44%	31%
It's too hard to motivate myself	11%	13%	19%	7%
The weather	5%	6%	4%	8%
My family can't afford it	8%	7%	2%	12%
Too hard to get to training, games or competition	8%	9%	7%	10%
No places nearby to do what I want to do	5%	7%	4%	9%
Can't fit it in with other family member's activities	5%	3%	3%	3%
I don't have the equipment I need	4%	9%	-	16%
I have no one to do it with	3%	3%	4%	2%
I don't want to fail	4%	6%	4%	7%

4.4 What more could OCT do to reduce barriers to participation

OCT already funds a number of things that reduce barriers to participation, such as events and festivals, programmes and equipment. However, at the OCT workshop on 26 October 2021 further consideration was given to the identified barriers to participation and what steps, if any, OCT could take to further reduce those barriers. The following suggestions were made:

- The weather:
 - Contribute to the cost of warm clothing/ uniforms for young people.

- Fund the development of indoor facilities so young people, in particular, do not have to participate outside during the colder months.
- Lack of access to or the cost of transport:
 - Support free or subsidised bus services to get people to venues to be active.
 - Work with taxi companies to provide reduced costs for lower socio-economic families that do not have access to road-worthy vehicles.
- Lack of facilities nearby:
 - Support marae to provide more sport and recreation opportunities as they have a strong community focus and can provide cultural sport and recreation experiences.
 - Incentivise groups to work together to develop multi-use facilities, particularly in rural communities.
 - Work with councils to have informal sport and recreation opportunities available in local parks, such as nets for volleyball or hoops for basketball.
- No one to be active with:
 - Encourage greater use of social media to connect people with similar interests.
 - Expand the buddy system to include a sport and recreation focus.
- Cost:
 - Provide a separate hardship fund for those struggling to pay for their children's sports fees or equipment.
 - Partner with councils to provide free pool entry for under 18 year olds or at least free pool entry on weekends.
 - Subsidise rural/school pool operating costs to reduce or remove key cost for community access.
 - Partner with other funders to provide free swimming lessons for tamariki.
- Tiredness:
 - Ensure that young people have access to good nutrition, possibly through school.
- Fear of failure:
 - Make funding to codes conditional on them promoting Sport NZ's *Balance is Better* approach¹⁹ and seek evidence of how that is done through the reporting process.
 - Contribute to 'have a go expos' at schools to give young people the opportunity to try different activities out before they/their families commit to them.

NB. Any funding to facility development or upgrades needs to align with the sub-regional sport and recreation facilities plan and the regional plan once it has been developed. Any significant facility developments should first be tested through proper planning processes such as a feasibility study and business case. In the first instance the development of the regional plan should be a priority. It also needs to be conditional on the facilities being fully accessible not only to those with obvious disabilities but the disabilities/reduced mobility, sight and hearing that come with aging to recognise the needs of an aging population.

¹⁹ For more detail on Sport NZ's Balance is Better Approach refer to Appendix Two

5.0 Emerging Trends

Over time a number of trends have emerged that challenge the very structure, leadership and delivery of sport and active recreation in New Zealand.

5.1 Macro trends in sport

The Offering of Sport

Commercialisation, globalisation and sport branding are creating powerful offerings for consumers. These sometimes support existing sports, but often challenge them with new alternatives.

Individualisation

Individual sports are thriving. They allow people to be active when and where they want, to better suit their lifestyle and other commitments like work and family.

Connection

Countering individualisation is why people strive for community and belonging through sport. This is increasingly enabled by technology and challenged by an increasing diversity of cultures and sports offerings.

Hubbing / Multi-Use

A large proportion of the population lives in cities, so hubbing and centralisation is a major driver in facility development. What does that mean for those in rural communities?

Lifestyle and Health

In this current 'age of chronic disease' the value of sport and activity is highlighted. Organised sport and technology can help, but medical and pharmaceutical interventions are emerging that enable a preferred body image without physical activity.

The Built Environment

Many facilities are tired and no longer fit-for-purpose so need to be either upgraded or re-built. There is a need to think ahead to cater for tomorrow's diverse sporting needs.

5.2 Micro trends in sport

The Changing Face of Sport

Traditional sport is sliding down the popularity list and being overtaken by more informal recreational activities like walking, swimming, cycling and home workouts. This is impacting on club membership and competition numbers. Sports are having to be creative to adapt their traditional offerings to retain/secure members.

Increasing Importance of Reinforcing the Value of Play and Variety

Sport NZ in particular has identified the value and variety of play as key to the development of young people not just for their sporting future but for their overall happiness and wellbeing. Their Balance is Better approach has been adopted by a number of the codes that OCT funds and is a move away from regional competitions and youth development squads to a more relaxed participation approach with young people enjoying a variety of activities rather than specialising in one code from a young age.

Volunteers

There continues to be a strong reliance on volunteers for the governance, management and delivery of sport across New Zealand and the Otago Region. Expectations around greater use of technology, health and safety requirements, accountability of directors and an aging population are putting some potential volunteers off and leading to burnout of those left in roles.

Demand for Indoor Space

There is an increasing demand, particularly from parents to move more outdoor sport indoors, particularly in areas like Otago which

can have harsh winters. Other sports such as gymnastics/trampolining have quite specific requirements so demand purpose-built sole use facilities. Unavailability of public space means the likes of gymnastics, ice and snow sports are having to either lease commercial properties at commercial rates or expect members to pay entry fees on top of membership and competition fees.

Ageing Facilities

There are a number of earthquake prone and aging facilities throughout New Zealand and the Otago Region that are no longer fit for purpose. These include school pools that are reaching the end of their useable life even though there is community demand to keep them open and available for the community.

Sustainability

There is still a heavy reliance on gaming and other funders like OCT. Funding tends to be annual and is not always available for the things needed to keep the code afloat such as

salaries and deferred maintenance and increasing running costs.

Unrealistic Expectations

With improved technology and design, participants have an expectation that they can access the top of the line facilities previously only experienced by high performance sport. Many codes see access to indoor or artificial playing surfaces as a given that even the most junior players should have access to.

Environmental Issues

There has been a growing demand for artificial playing surfaces and an appetite for them at local government level to address climate change and the impacts of the weather on training and competition grounds. However that appetite, at a local government level, is subsiding as the environmental cost of creating such surfaces and disposing of them when they reach the end of their life is now better understood.

5.3 Sport NZ Futures Work

Since May 2019 Sport NZ has been investigating the future of sport, active recreation and play in New Zealand. While the work predated the onset of the COVID pandemic, the project has taken on greater significance as a result of the impacts of COVID, both in the short and long term. The work considers some of the trends referred to above, but also considers a much broader range of potential influences on the Sector and what impact they could have going forward. The following diagram lists some of those potential influences under 6 key headings:

Political

- COVID – vaccine roll out and impact on travel.
- Single party government – Minister with increased authority, seeking increased accountability.
- Wellbeing - Recovery and economy dominating.
- Health reforms – Government focus on rationalisation, alignment opportunities.
- Gender equity – Minister's priority, Me Too Movement. Women and Girls Sport and Recreation Strategy.
- Mental health and addiction focus – Second health wave of COVID. Physical activity part remedy.
- Crown/Māori relations – Increasing expectation of 'seat at the table'.



Economic



- National economy – Tightening of government purse.
- International disruptors – COVID having significant impact on global economy.
- Workforce – Employment levels holding.
- Discretionary income – Housing and rent adding to high levels of personal debt.
- Proceeds from gambling – Online gambling review likely to disrupt.
- Local Government spending – Focus on three waters and reforms could impact on sport and recreation spend.
- Sponsorship – COVID negatively impacting through diminishing funds or more pressing issues to support.
- Broadcast opportunities – Mobility and proximity issues impacting product to broadcast.

Social



- Global health – COVID impacting society on all levels.
- Social resilience – COVID heightens need for community connections which sport and recreation can offer.
- Inequality – Heightened focus, driven in part by rapidly growing gap between rich and poor.
- Athlete wellbeing – Potential backlash on international travel for sport, increased athlete and public activism.
- Changing nature of work – COVID accelerated reshaping of work, will also reshape time for sport and recreation.
- Gender diversity and fluidity – Global move away from male/female only distinction will impact on facility development requirements and competitions.
- Intergenerational tension – Cost of living and difference in social positions for example climate change.
- Inactivity health issues – World Health Organisation announcement on poor youth activity levels.
- Focus on aging population – Global and national issue as aging population rises as proportion of total population but do not feature as community of funding priorities.

Technological



- Disruptive technology – Rise of eSports and other virtual and augmented forms of techno entertainment.
- Digital content and multiple devices – Growth in digital channels (content and news) accessed across multiple devices provides opportunities and challenges for sport and recreation.
- Credibility of information – Heightened potential for fake news.
- Digital divide – unequal access to technology.
- Human enhancement impacts 'level playing field' – Bionics, bio-engineering, genetic manipulation.

Legal



- Global travel restrictions – Impacting athlete travel, hosting of events, and international competition.
- Treaty of Waitangi – Heightened emphasis on honouring.
- Crown entities – State Services changes.
- Health and safety – Cost of compliance impacts on sport, active recreation and play.

Environmental



- Housing intensity, reduced open spaces and transport – Auckland, but other metro pressures.
- Climate change – Transition to zero carbon by 2025.
- Scrutiny on environmental footprint – COVID may permanently change air travel.
- Land ownership and lease-hold land – Access to recreational reserves and high country.

Many of these will impact on sport and recreation in the Otago Region in the future and indeed, feedback from OCT's stakeholders confirms, many of them already are. OCT would be well advised to keep abreast of this work and possibly in partnership with the likes of Sport Otago and other funders in the OCT funding region, regularly consider what impacts there are and how they are changing over time, as these may identify where there is a greater need for funding to ensure a consistent delivery of sport and recreation opportunities across the region to OCT priority groups.

In its most recent work on the Futures topic, Sport NZ made a number of assumptions. These include:

Pandemic Recovery

Assumed Future

As vaccines become more widely distributed and border restrictions ease, people will regain confidence and international travel will revert to pre-pandemic levels within 2-3 years. The governmental support airlines have received through the crisis will ensure flight patterns and availability will remain largely unchanged and affordable.

Alternate Future

The financial stress on the travel sector becomes unsustainable as the pandemic lingers in significant sectors of the global population and airlines fail. This could occur if new variants emerge that undermine the vaccination programme, businesses aggressively adopt remote operations, and/or fuel prices start to climb as economic demand returns.

Economic Outlook

Assumed Future

The broader economic environment will remain relatively stable, if slow-growing. This is supported by lower than anticipated domestic impact of the pandemic and few overt signs of a global economic stress. Inequality is likely to increase as house prices, though slowing in growth, remain out of reach for younger generations. The cost of active recreation will increasingly become a barrier as societal inequality widens.

Alternate Future

The economy experiences a significant downturn within the next five years (shorter interval than GFC to pandemic) that again places significant economic pressure on New Zealand. The potential sources for increased economic stress include increasing geopolitical tensions (e.g. Indo-Pacific relations), industry substitutions (e.g. impact of alternate animal-free foods), or criminal activity (e.g. multiplying cyber-attacks). It should be noted that multiple stresses may occur simultaneously.

Māori Partnership

Assumed Future

Further development of the Te Tiriti relationship fosters a positive Māori experience of active recreation. Increasing numbers of New Zealanders take a holistic wellbeing approach that reflects Mātauranga Māori principles and experience. Active recreation is now experienced not just in terms of the activity undertaken, but in terms of how that links to the wider environment in which it is a part.

Alternate Future

Levels of inequality continue to widen creating additional barriers for Māori to participate in active recreation. Disillusioned by a lack of voice in governance, and with increasingly poor statistics for health and education, Māori focus on development of Te Ao Māori environments for education, work, play and living situation will intensify and wider initiatives that have less relevance will receive less attention.

Sustainable Funding

Assumed Future

Declining revenues from media rights, ticketing and merchandising will place codes under continued financial and some will inevitably fail. However, overall funding levels to sport and recreation across all key channels will not decrease.

Alternate Future

Government funding is controlled at community level and distributed to support activities that are most relevant to keeping people locally active. The loss of focus on specific codes has had the advantage of freeing funds to drive activity in more innovative ways that enable a broader section of the population to participate.

6.0 Stakeholder Feedback

As part of the sector scan RSL interviewed 20 respondents from the wider Sector. This included representatives from councils, other funders, RSTs, RSOs, targeted communities such as the disability and youth development sector, schools and clubs. In addition to the interviews, 16 organisations responded to a request for email responses to a series of questions. A full list of respondents is set out in Appendix One.

The following questions were posed to both groups (with follow up questions occurring if required):

- What are the current and future pressure points within the Sector?
- What emerging trends are developing?
- How is your organisation adapting to meet those trends?
- What would your desired future look like?
- What do you think OCT's role as a funder should be in the Sector?
- What do you think the key outcomes and/or priorities for funding streams should be for OCT in the future?
- What do you think of OCT's application and reporting processes?
- Should OCT fund professional sport?

Most of the pressure points and emerging trends align with the emerging trends referred to in Section 5 above and with Futures work that Sport NZ has been leading over the last 2 years.

6.1 Current and future pressure points

COVID

Not surprisingly COVID featured in many responses.

While the timing was not as bad as in 2020, the outbreak of the Delta variant in August did still have a negative impact with a number of organisations such as NZ Curling, Winter Games, Otago Hockey, Rugby and Football having to cancel events which are usually key revenue sources for them. Concern was raised that it would also likely impact on future revenue as there may be some families where family members have lost their jobs or had to take reduced hours, so may not be able to afford future membership fees, facility and competition entry fees and/or travel.

'COVID has been challenging. This year wasn't as bad because we were near the end of the season. Last year threatened to wipe out the whole season.'

Andy McLean, Otago Hockey

There was also a concern that with so many businesses under financial pressure they may not be in a position to offer any or least the same level of sponsorship they have in the past. One concern raised in relation to this was that there could be a trickle-down effect if the big sponsorships suffer, as those affected would look to other sponsors that usually support the Sector at a lower level.

A Sport Otago Sector Resilience Survey undertaken in April 2020 reported just over half of the 140 respondent organisations indicated they would consider a structural change within the next 6 months if necessary for organisational viability. For Otago Cricket that has involved merging a couple of roles with Otago Hockey. Otago Rugby has simply not replaced staff when they leave. This puts pressure on everyone left behind to cover the extra load. When the Governments 'Strength and Adapt' fund became available last year, Otago Cricket saw it as a great opportunity for codes to share locations to administer their sport and share resources.

'We missed the boat with the Strength and Adapt fund. It was the perfect opportunity to take a city-wide approach, with one centre big enough for everyone. No one was brave enough to do it though.'

Mike Coggan, Otago Cricket.

Snow Sport NZ and NZ Curling both expressed concern about the lack of competition because of lockdown and travel restrictions. With the Winter Games not going ahead Snow Sport NZ has not been able to run any World Cup events which means their high-performance athletes have missed out on vital competition and opportunities to gain points which go towards their world rankings. Because New Zealand's borders have been locked the ski resorts have struggled to secure staff and because overall numbers on the slopes are down Snow Sport NZ is having to cover costs that most ski resorts would usually absorb themselves.

'Cancellation of some of our events has meant some of our players have missed out on international selection. We haven't been able to hold our nationals for the last 2 years',

Nelson Eade, NZ Curling Assn

Volunteers

The Sector is still heavily reliant on volunteers, but there is a shrinking pool. Sport NZ research shows young people are not keen to volunteer as they already have competing interests for their time. With an aging population, many existing volunteers are looking to wind back rather than step up their involvement. Also increasing

'People have more pressure on their time now. Their routines are more complicated. Also some of the older traditional volunteers struggle to adapt and accept where things are at with the Balance is Better approach.'

Andy McLean, Otago Hockey

'I'm seeing 'volunteer burnout' across a number of clubs because of reducing numbers and increasing responsibilities'

Tiny Carruthers, Sport Central.

accountability around governance and health and safety and increasing use of technology is putting both existing and potential volunteers off.

Rugby league which has a heavy reliance on volunteers finds that there is a reluctance, almost a shyness from a cultural perspective to step up and volunteer.

Increasing Costs but not Revenue

Most respondents be they council, RST, RSO or NSO talked about the pressure of meeting increasing costs in the absence of increased revenue and in some cases reduced revenue because of event cancellations as a result of COVID.

Some particular areas of concern relating to increasing costs are:

- Sports equipment:
 - Particularly with the impact of increased technology and availability within New Zealand.
- Facility development and maintenance:
 - Some materials necessary for construction and tradespeople to do the work, are scarce which is pushing the costs up.
 - There is a greater drive for high spec surfaces both inside and out.
 - Blurring of the gender divide means that consideration needs to be given to additional amenities at facilities to accommodate not just the rainbow community but also cultural diversity.
 - Earthquake strengthening and the demands of aging facilities that are no longer fit for purpose also pushes maintenance/redevelopment costs up.
- Greater accountability around health and safety:
 - Schools can no longer run school camps without the assistance of specialist external providers.
 - Road safety management specialists and equipment are required for any event on the road. There are also increased insurance costs that go with this and additional training for volunteers.
- Insurance:
 - Of facilities and equipment.
- Venue charges:
 - With an increasing number of facilities privately/commercially owned the price to hire and/ or lease space is increasing. This is particularly an issue for Gymsports and indoor ice sports.
- Technology:
 - There is a greater expectation from participants for the adoption of technological advancements whether they relate to communication, access, surfaces, time keeping or equipment.
 - Greater expectation for staff/ volunteers to use technology for things like club administration, recording scores/rankings and developing and communicating draws.

'School camp is often the first opportunity students get to experience the outdoors. The Ministry of Education subsidy isn't enough to cover the actual cost of camp and we can't pass the cost on to the parents. It would be great to support every school in the area for this.

Pauline Simpson. Rosebank School

The same amount of effort needs to go into planning a simple club event as to plan and organise a national or Oceanic event. It's just too onerous for most clubs.

Greg Bower, MTB Otago.

Travel

Proximity to settings that provide the opportunities people want is an issue for many and that becomes even greater when you add mobility issues that require special vehicles, multiple members of a family participating at different places at the same time, access to public transport, access to a warranted drivable vehicle or access to a vehicle at all.

People with disabilities sometimes have special travel requirements, there is often a need to be accompanied by a minder or parent and speciality vehicles with ramps or lifts are sometimes

required. The cost of accessing these vehicles is expensive. This is an issue for organisations which focus on providing sport and recreation for people with disabilities like Parafed and Riding for the Disabled.

“We would like to be able to offer our members a travel subsidy, because most of them are still at school and many of their families are already struggling to meet the costs of having a child with a disability.”

Campbell Wilson, Parafed.

For rugby league the issue is more around families having access to a vehicle at all, or even a drivers' licence. This means they can't get their children to practice or the games so they miss out. Many of these children are already at risk so they don't get the opportunity to have fun in a safe environment and access the other social services league is offering them.

While Sport NZ has a modest rural travel fund (\$400,000 distributed across 35 councils, it is not available to areas such as Dunedin, despite many in the area having to travel substantial distances to participate in sport and recreation.

Accessing funding

While all respondents were grateful for the funding they receive from OCT, they advised that funding is an ongoing issue for them, as all need to seek funding from sources other than OCT to maintain delivery of the opportunities they provide.

- There is still a heavy reliance on Class 4 gaming funding. This is problematic as many councils have a 'sinking lid' policy which means if sites are closed down the money is lost from the community. There is also concern that the money is not actually going back into the community as everyone believed it should.
- There is never enough to go around as virtually every fund is over subscribed.
- Applying for funding and reporting against how it was used is time consuming and sometimes the amount of effort, particularly for the reporting, outweighs the benefits if only a small sum is involved.

“We can't keep putting staff on 12 month fixed term contracts because we don't know if we'll get funding to cover their salary, particularly when we're expected to do new things”

Chris Wright, formerly of Football South.

“We have had our revenue cut in half as some of the pubs have been sold, the machines taken over by another Gaming Trust and the money is heading north”

Mike Curtis, Bendigo Valley Sport and Charity Foundation

- Traditional funding for kids sport through Kiwisport has been redirected to the Tū Manawa Fund that has different priorities. While supporting new and different opportunities, there is now a gap in funds available for codes delivering sport, even if they are trying to adapt it to make their sport more attractive to young people.
 - Annual funding does not provide any certainty for securing and retaining staff which can impact on the consistency of programme delivery.
- Funders are always looking for applicants to do more, new and interesting things, but the level of funding does not increase.
 - There is more and more demand for high spec facilities which come with increased costs and demands on councils and other funders.

- Funders like OCT ask about sustainability of projects and programmes, but the bottom line is if organisations cannot access OCT or funds from other sources, nothing is sustainable.

'Funders need to work more collaboratively with councils to ensure we all get the best results for our communities. Everyone wants a top level facility nearby. Sometimes we just have to say no. A regional spaces and plan with a good decision making framework, would give a clear direction for everyone.'

Gordon Bailey, Central Otago DC.

6.2 How stakeholders are addressing emerging trends

Many of the emerging trends identified by the OCT stakeholders align with the trends that have been identified in section 5 and the Sport NZ Futures work. For many, the emerging trends are already some of the pressure points that stakeholders have identified and are dealing with. Some emerging trends are seen by them as opportunities to adapt and attract new members and participants, while others see them as unnecessary distractions for their time and effort. In some cases additional costs put them under pressure to deliver their tradition sport and recreation opportunities. Depending on the trends sport and recreation providers are addressing them by listening, adapting and changing. For some this is working well, for some of the more traditional sports like cricket it is taking longer, and their participation numbers are reflecting this.

COVID

- Ensuring the organisation has the necessary resources for staff to work from home to ensure an uninterrupted delivery of services.
- Learning how to run conferences/training online.
- Understanding the requirements for different COVID levels and what that means to the delivery of activities, that is whether they can go ahead as per normal or adapted in some way.
- Being able to rearrange competition calendars/ combine some events to catch up.

Technology

- There is a desire to make it easier for volunteers by embracing new technology without scaring them off. The challenge is upskilling volunteers to keep up with the demands of participants and new reporting requirements/accountability.
- Coming up with ways to distract young people from being stuck on technology but at the same time using it to attract them.
- Accommodating e-bikes on trails.

Diversity

- Considering the needs of changing ethnic, gender and ability/aging diversity in facility and programme design.

Meeting the needs of participants

- Coming up with innovative ways to attract new, particularly young, participants.

- Adapting traditional offerings of competitive sport to address the increasing demand for more social/ active recreation/ play opportunities.

Keeping up with changing priorities

Adapting to meet the changing priorities of Sport NZ and other Government Strategies:

- Focus on tamariki and rangatahi – Active Recreation for Rangatahi Strategy 2021.
- Women and Girls Strategy 2018.
- Disability Plan 2019 – Inclusion Fund 2021
- Move from traditional sport to active recreation and play – Tū Manawa Fund.
- Balance is Better 2017.

'Women and girls is already a huge growth area for us. Dunedin is a host city for the 2023 Women's World Cup. We need to be ready to meet the demand that'll flow on from that'.

Chris Wright, formerly of Football South

Greater awareness of the significance of wellbeing

Trying to convince funders, social welfare and youth development agencies that sport and recreation can do so much more, particularly , but not only, for young people.

'OCT funding allows us to deliver competitions and participation opportunities, but rugby league has so much more to offer to help our Māori and Pasifika kids to address things like mental health, crime and suicide. But we need funders like OCT to think outside the box and think of us as more than just as a sport.

Steve Martin, NZ Rugby League

Climate change and sustainability

Councils have this high on their agenda and will be looking carefully at the implications of artificial vs grass surfaces, both from water use and carbon emissions perspectives.

Hubbing

Councils in particular see the value in this as a solution do address aging facilities that are no longer fit for purpose. They can work well in highly populated areas where they are easily accessible by many but are less attractive in more rural centres where people have to travel further to access them.

Hubbing can range from shared office/administrative space and sometimes staff, to multi-use sports spaces.

6.3 Funding professional sport

While there was support for OCT to fund pathways to performance, through the likes of the Otago of Academy of Sport, there was little support for the idea of OCT funding professional sport particularly athletes salaries, although it was acknowledged that the inability to meet higher salaries around the country is sometimes the issue with keeping them in the Otago community. The role of OCT was universally seen as one to grow and support community sport and recreation.

'They're called Community Trust for a reason,'

Mike Coggan, Otago Cricket

The view generally expressed was that those codes that have professional franchise teams should be getting support for these from their NSOs, TV rights and gate takings, not to mention corporate sponsorships. But there was also acknowledgement that not all franchise teams sit at the same level, so funding professional sport should be considered on a case-by-case basis. What is key is the aspect of community development involved.

'If the franchise has a surplus in any given year it tracks back into Netball South, so back into the community. The funding from OCT enables us to commit the players to give back to the community by school and community visits and workshops.'

Lana Winders, Netball South

6.4 Desired future state

Many talked about how many teams they would have in their regular competitions, how many players will make it to the Black Caps or the Silver Ferns, how many more young people or women and girls would have signed up, or and how many new facilities they would have access to. But Richard Kinley's quote on the following page encapsulates the view expressed by most:

“Our desired future state would be to have healthy clubs with stable participation numbers across all aspects of the game – players, coaches and officials. It would be great to be in a financial position where we can plan to meet the changing needs of our players, rather than just do what we always do because that’s all we can afford to do”

Richard Kinley - Otago Rugby



6.5 The Sector view of OCT

Feedback about OCT was universally positive.²⁰ OCT is seen as a cornerstone funder for grass roots sport and OCT funding is critical towards developing a skilled workforce for the Sector.

Everyone spoken to value their relationship with OCT and spoke highly of the accessibility and assistance they get from OCT staff when working through the application process when considering what to apply for. Some questioned whether OCT tried to do too much and possibly would be better funding fewer with more, rather than trying to fund everyone. Despite this there was universal acceptance that OCT's equitable approach was fair, particularly for those smaller more rural communities.

Funding facilities is seen as a key role for OCT, particularly by the councils across the region. All agreed that the development of a regional sport and recreation facilities plan should be a priority. The plan needs to consider all facilities across the region and identify where effort needs to be placed to meet the needs of the Sector, whether that be for national, regional or community facilities. The plan needs to encompass all facilities regardless of whether they are council, school or privately owned and needs to be accompanied with a decision-making framework which includes a needs analysis and feasibility studies (incorporating CAPEX and ongoing OPEX and programming considerations) being undertaken before any funding is directed into updating existing or developing new facilities. Once completed, OCT needs to work, with the councils, Sport Otago and other funders like Central Lakes and Southern Trust, as it has with the sub-regional facilities plan, to make sure any funding aligns with the priorities identified in the regional plan and does not undermine it.

Community Trust South and Central Lakes Trust both acknowledged existing collaborative relationships with OCT but saw potential to improve this. Particularly when there is a regional sport and recreation facilities plan to work to.

There was universal support for OCT to fund 'versatile' facilities that can be used by different groups, within the wider community, including schools or different types of users. Indoor facilities were identified as being a priority across the region. It was acknowledged that this may not be possible for gym sports when incorporated with trampolining as it has specific height requirements and needs to have specialist equipment set up on a permanent basis.

Funding to support ongoing OPEX and maintenance costs of facilities was identified as a gap that OCT could consider funding. It is these ongoing running costs that influence the success of a facility not just the initial capital expenditure to build it and ongoing programming, both of which OCT does

'Funding from OCT acts as a catalyst to secure resources from other funders.'

John Brimble, Sport Otago

'OCT is a critical partner to us for realising the aspirations of the sport and recreation community.'

Scott McLean, Dunedin City Council

'It's great that OCT is prepared to support a minor sport which has a strong local tradition and history and can provide youngsters with skills that can stay with them for life.'

Nelson Eade, NZ Curling Association

'Only a few funders fund feasibility studies and needs analyses. It's an area everyone struggles with and it's so important to ensure funding goes to what is needed rather than just what is wanted.'

Erik van der Spek, Waitaki District

²⁰ With the exception of Bendigo Valley Sport and Charity Foundation and Clutha Licensing Trust who were disinterested.

support. That is why those components are so important in the planning stages of facility development that have been referred to above.

There was universal support for OCT being outcomes focussed, rather than focussed on numbers and exactly how much is spent on what.

A few questions were raised by a number of the codes: OCT is constantly looking at them doing more but the level of funding does not increase year on year to address that. But, each year the applicants are asked how they are going to sustain activities/projects they have been funded for. For most the reality is they have to either cut back on staffing costs or find alternative funders.

“The outcomes focus allows me to tell a story about what we want to achieve and what difference we think it will make. There still needs to be numbers, but its more than that.”
Richard Kinley, Otago Rugby

While the level of funding year on year is generally consistent, and appreciated, there is no guarantee that an applicant will get the funding. So, there is an element of anxiety each year when funding applications are made. The impact of this is that codes have no security to offer their staff long term contracts and many are either having to recruit new staff on a regular basis or offer them year on year fixed term contracts which is pushing the boundaries of employment law. Many, including councils expressed the desirability of longer term funding arrangements, acknowledging there are some already in place, agreeing to more would provide more certainty and security for staff and programme delivery.

There is lack of understanding around how levels of funding are reached and why some organisations, who believe they have higher participation levels and impact, receive less money than others. Table 2.3 which shows the ranking of OCT funding distributed to codes through the Regional Sports Grant Fund, shows that this does not necessarily align with the level of participation in the funded codes. Respondents were interested to know if there is a formula to calculate funding or whether it is just historical.

7.0 OCT Application and Reporting Processes

OCT requested RSL to consider how its application and reporting processes relating to its funding in sport and recreation could be further enhanced.

7.1 Application Process

For those used to making multiple funding applications on a regular basis, the consensus was that the OCT's electronic application process was far simpler than previously and for some, far simpler than other funders. The view differed slightly for those 'kitchen table top' volunteer administered organisations, with some:

- Struggling with the technology.
- Asking for a check list.
- Asking for a phone number to call for assistance when in trouble.

While the application asks the applicant to identify which priority area, (now funding pillar), their application aligns with, who their project will benefit and how, it does not ask them to identify:

- Which priority community their application will impact.
- How it will impact that community.
- What success will look like.
- How success will be measured.

How success will be measured is problematic for many. Even though respondents like that OCT is more outcomes focused and less numbers focused, many struggle with how to respond to that. This is an area that OCT could either provide training in or provide additional funding for organisations to set up an appropriate measurement tool that can be used for current and future reporting.

The application asks:

- Do you have a Strategic Plan? - but does not ask how their application aligns with their Strategic Plan.
- Is your land leased/building leased – there is no rationale for this question, particularly as a copy of their annual accounts will identify what expenses are incurred. There also seems to be no relevance for the purpose of this question.
- What tagged funds or large reserves are being held for – organisations should be asked to provide a copy of their funding/reserves policy. Organisations, particularly larger staffed (paid) ones, should not be penalised for holding reserves that are in line with their reserves policy.

7.2 Reporting Process

While not considered arduous by most respondents, the reporting template needs to align with the information sought in the application. For example, if information is sought around alignment with OCT priority communities and applicant organisations own Strategic Plans, the reporting template needs to reflect this.

The level of reporting needs to reflect the level of funding. So it may be appropriate to have 2 different reporting templates depending on the level of funding. Lesser funding may be more about reporting on numbers than impact than greater funding.

The question of sustainability is problematic as an honest response from most applicants would probably be - without OCT support the project isn't sustainable. Maybe it would be more relevant to

ask 'do you wish to continue this project and if so, what ongoing support would you be looking for from OCT or other funders'.

8.0 Conclusion

The sport and recreation sector is complex in nature with outcomes that extend beyond the delivery of sport itself into the very essence of community wellbeing from social, health and economic perspectives.

The demographic profile of Otago is changing as are the participation choices of the community. OCT has an opportunity to look at how it can respond to these changes.

OCT plays a key role in supporting the delivery of those outcomes and needs to consider those outcomes from that broader perspective. OCT staff are respected and valued and OCT funding is greatly appreciated and seen as critical to the sustainability of the Sector. No changes in vision or goals were identified. The inclusion of women and girls as a priority community group would sit well with the Government and Sport NZ's strategic priorities and is already a community that many OCT funding recipients have identified for growth. Changing diversity across all areas such as gender, ethnicity and ability (age or disability related) need to be on OCT's radar.

There are additional opportunities identified, by stakeholders throughout this process and at the Workshop of 26 October that OCT could consider. It would be worth considering, whether such things like transport subsidies or even funding for equipment would be better distributed through additional/tagged funding to Sport Otago for equitable distribution through its sub-branches. Sport Otago has a close working relationship and understanding of clubs in each of its districts.

There is a pressing need for a regional sport and recreational facilities plan to be developed. This would provide an agreed decision-making framework that encompasses all sport and recreation facilities across the Otago Region. Once completed OCT needs to continue to work collaboratively with councils, other funders and Sport Otago to ensure the identified needs of the Sector are met.

Some minor tweaking/support could be made to the application/reporting processes.

Appendix One – Respondent Organisations

Interviews

NSOs and RSOs:

- Netball South Zone
- Otago Cricket
- Otago Academy of Sport
- Otago Hockey
- Football South
- NZ Curling
- Snow Sport NZ
- Mountain Biking Otago
- Parafed Otago
- Southern Zone Rugby League

Local Authorities:

- Central Otago DC
- Dunedin CC
- Waitaki DC
- Queenstown Lakes DC

Sector Groups:

- Sport Otago
- Sport Central

Other Funders:

- Bendigo Valley and Charity Foundation

Schools:

- Otago Boys' High
- St Kevin's College
- Rosebank School

Written responses

RSOs:

- Swimming Otago
- Mainland South BMX
- Otago Table Tennis
- Dunedin Ice Skating
- Squash Otago
- Tennis Otago
- Athletics Otago
- Otago Touch
- Cycling Otago

Sector Groups:

- Sport Otago (includes responses from all sub branches)

Other Funders:

- Central Lakes Trust
- Community Trust South

Targeted Communities:

- Halberg
- Special Olympics
- NZ Riding for the Disabled

Ethnic Youth Groups:

- Otago Adventure Trust

Appendix Two – Mental Health and Development Disorders

Figure xxx: Mental Health and Development Disorders 2017-2020 for the Otago Regional Council Region Compared with New Zealand, for 10-14 year olds

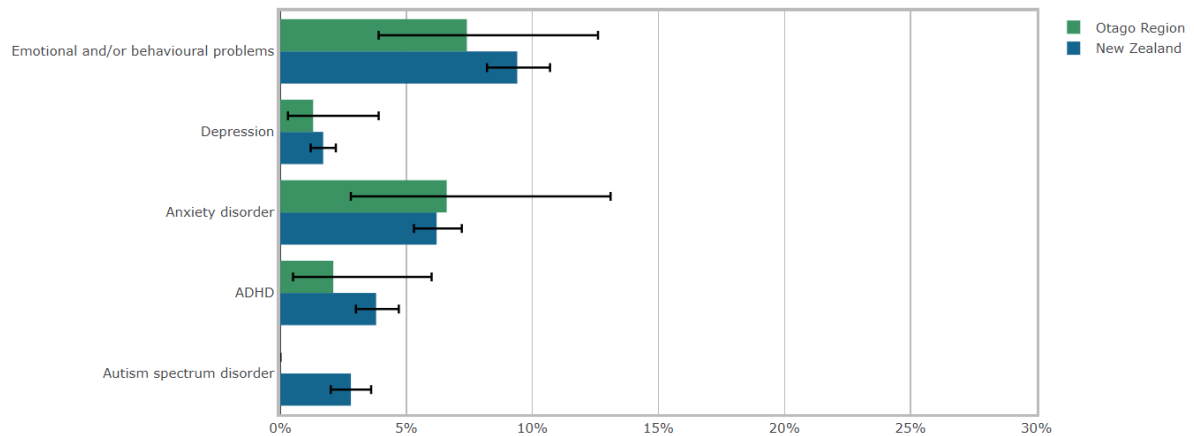
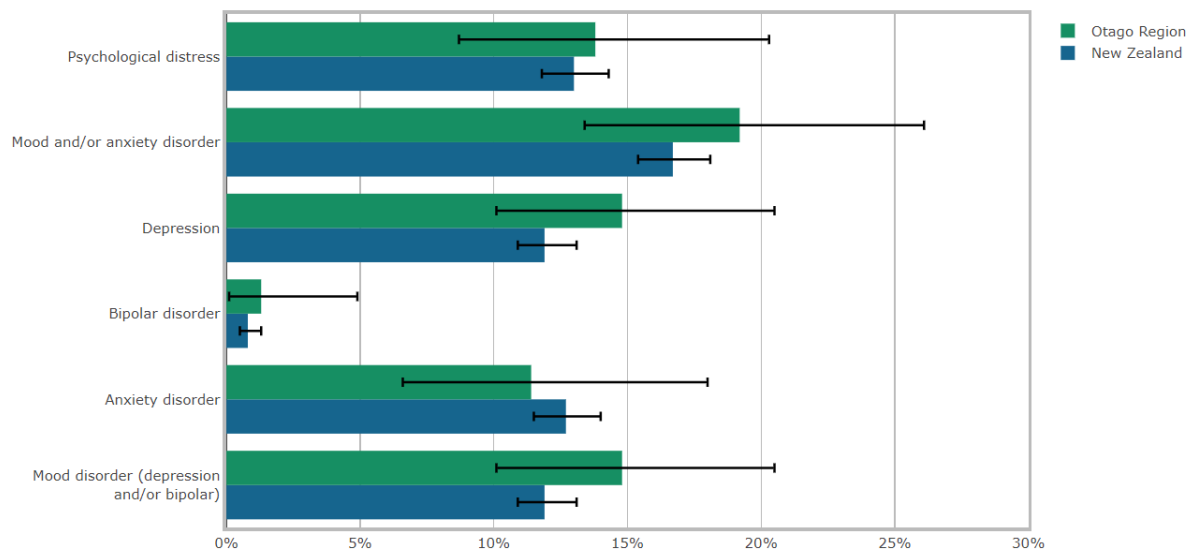


Figure xxx: Mental Health and Development Disorders 2017-2020 for the Otago Regional Council Region Compared with New Zealand, for 15-24 year olds



Appendix Three – Sport NZ’s Balance is Better Approach

According to Sport NZ there are three great myths of developing and identifying high performers:

- Early specialisation is good
- Childhood success leads to adult success
- Successful adults focus on winning

Sport NZ’s Active New Zealand Surveys show many young people are losing interest in sport because they have done too much too soon and others miss out because they are late developers. To address this trend, Sport NZ has been promoting an approach that *balance is better* since 2017. To achieve balance for young people they intend that everything they do will align with five core beliefs:

- Athlete’s needs come first
- Working together for collective impact
- Effective pathways
- Continuous learning
- Quality coaching

The significance of this approach is that there will be a greater emphasis on participation, with a view to engaging young people in life long participation in sport and active recreation that may over time lead to high performance.

To date 15 codes have signed up to deliver the *balance is better* approach in their sport:

- | | | |
|----------------|--------------|--------------|
| • Rugby | • Cricket | • Gymnastics |
| • Rugby League | • Basketball | • Volleyball |
| • Football | • Golf | • Touch |
| • Hockey | • Softball | • Waka ama |
| • Netball | • Athletics | • Badminton |

The principles of

BALANCE IS BETTER



Inclusive, fair and safe sport

All New Zealanders have the right to participate in sport in an inclusive, fair and safe environment.



Bold and courageous leadership

Bold and courageous leadership at national, regional and local levels is required to design and deliver quality youth sport participation and development opportunities.



Collective attitudinal change

Sport leaders, coaches, administrators, parents, and caregivers involved in youth sport must collectively lead attitudinal change.



Encourage variety

All young people should be supported to participate in a range of activities and play multiple sports.



Balance getting better with doing too much

Adults need to proactively monitor and manage the workload (intensity and volume) of motivated young people to mitigate the risks of overtraining and overloading.

Quality experiences, regardless of ability or motivations

All young people should receive a quality sport experience, irrespective of the level at which they are involved.



Working together

Aotearoa's sport sector must work collaboratively to encourage the widest possible change for the wellbeing and sport participation of young New Zealanders.



Skill development for all

All young people should be offered participation and skill development opportunities.



Talent ID occurs later

Talent identification should occur later in young people's development, reviewing the role and nature of national and regional representative selections and tournaments is an important step in ensuring elite sport attitudes and practices are introduced at developmentally appropriate times.



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