



Insights to...

MOVING WAIKATO 2020



*Growing our vision to have the
Waikato region "Out there and active"*

NOTHING HAS CHANGED

Sport Waikato was founded in 1986 to inspire and enable the people of the Waikato to be active and healthy for life.

We help people to help themselves, with the goal being 'everyone out there and active'.



BUT EVERYTHING IS CHANGING

Urbanisation and ageing are significant drivers behind changing demographics. Consumer expectations and behaviour are changing rapidly, along with continued growth of social inequalities. Changing lifestyles, technology and the ways in which individuals participate in sport, recreation and physical activity are changing the way we need to deliver. Traditional funding sources are under pressure.

Sport Waikato's aim is to bring together the people of the region through sport, recreation and physical activity. The view remains that each person is a potential client of Sport Waikato.

Our role is to get and keep the communities of the region active and healthy for life.

Sport Waikato is inspired by the words of Te Puea Herangi: **"Mahia te mahi hei painga mo te iwi."**
We strive every day to 'do the work for the betterment of the people.'

MOVING WAIKATO 2020



*Developing a vision for the customers
we share – the people of the Waikato*



STRATEGIC THINKING

This is a partnership document prepared in collaboration with key stakeholders and strategic partners across the Waikato region.

Collectively providing opportunities for each and every member of our community to be out there and active for life.

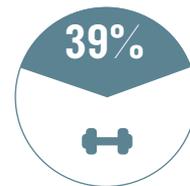
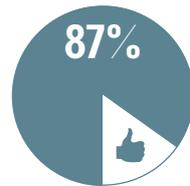
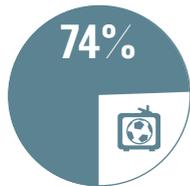
- This is a project about **thinking ahead**, focusing on our customer - 'the people of Waikato' - and collectively providing **opportunities** for each and every member of our community to be out there and active for life.
- The inspiration of the words of Te Puea Herangi, "**Mahia te mahi hei painga mo te iwi.**" We strive every day to '**do the work for the betterment of the people**' remain relevant to our people, our organisation and our partners.
- **Moving Waikato 2020** is a project that utilises available statistical data, combined with subjective stories and feedback to define "**What's next for sport, recreation and physical activity?**" in the Waikato.

Moving Waikato 2020 seeks to understand how key strategic partners and stakeholders can contribute together to achieve an active regional community.

REGIONAL PROFILE

We're active... but we're just not active enough!

ADULTS



TRADITIONAL MAORI GAMES HAVE GAINED MOMENTUM ACROSS THE REGION
IWI GAMES ARE THE HIGHEST ATTENDED EVENT ON THE TRIBAL CALENDAR

YOUNG PEOPLE

YOUNG PEOPLE IN:



like playing sport either a lot or a little

spend **LESS** time, and are **LESS** active

are slightly **MORE** active

spend **MORE** time, are much **MORE** active, and want to **DO MORE**

TEEN DROPOUT MEANS 15-18 YEAR OLDS PLAY LESS SPORT, AND STUDENTS AT LOW DECILE SCHOOLS ARE LESS LIKELY TO PARTICIPATE IN ORGANISED SPORT

Young People's Survey 2011

ECONOMIC VALUE

Sport is an important economic sector in the Waikato, providing employment and income, and highly valued services



OR



Economic Value of Sport 2011

KEY THEMES

Trends affecting the future of sport, recreation and physical activity

SOCIETY

Society has changed more rapidly in the last 10 years than it did in the previous 100 years. We will continue to see growth at older ages, with a continuation of ethnic diversity. Society has high expectations of service and delivery. Urbanisation will accelerate in the next 20 years.



LIFESTYLES

People are increasingly time poor, yet trying to fit more in. More pressure at work and less connectivity with our communities continue to impact on healthy and active lifestyles. Technology has accelerated communication and access to information in a virtual world. We no longer have to be physically present to participate.



DEMAND

Fitness and relaxation are now the main motivations for sport and recreation. Increasingly, we are moving from formal membership to informal and experiential pay-to-play engagement. Trends continue to move towards the consumption of sport, versus the traditional model of participation.



LANDSCAPE

Funding for sport, recreation and physical activity will continue to be challenged. Councils' focus will continue to be on debt reduction and the provision of core services. Competition for trust and philanthropic funds will also continue. The health dollar and focus on health and wellbeing will grow.

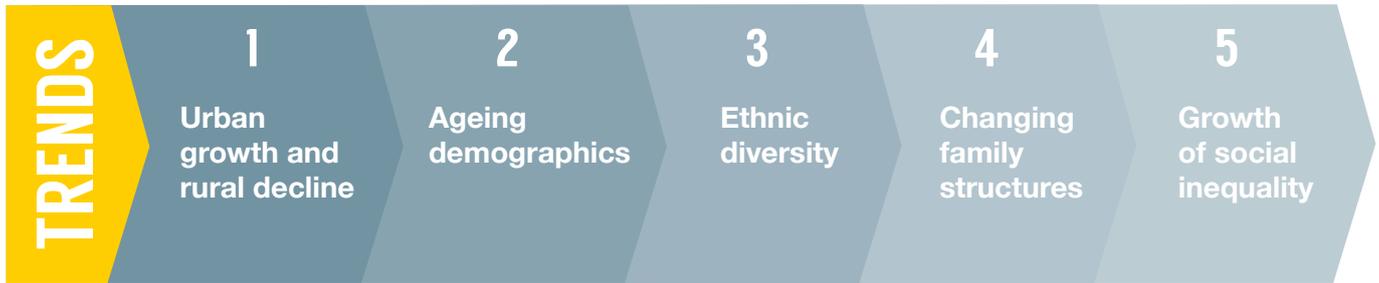


PARTNERS

Sport, recreation and physical activity partnerships will require a more coordinated approach. There are more commercial providers in the market, with fragmented promotion and an appetite for collaboration. Strategic community partnerships will be increasingly important.



CHANGING SOCIETY



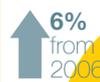
THE FACTS

MAORI



Maori make up 20% of the Waikato region's population.

WAIKATO REGION



By 2030, the Waikato population is expected to increase by 16% to 470,000



Hamilton City will grow and have increasing ethnic diversity.



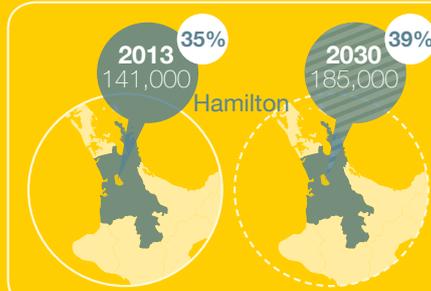
Rural areas will decline and have increasing proportions of older people.

The ageing demographic trend will continue. We will continue to live longer and be defined less by age and more by ability.



Traditional family structures are no longer the norm. One parent and shared parent families, double income families, and the role of grandparents and extended families are increasing.

The Waikato region is slightly more deprived than the national median, with a lower than average NZ 2006 Deprivation score.



Population growth is projected to continue in Hamilton City and the Waikato District. Growth will slow or decline in all other areas.



Market segmentation and targeting will play an important role as the population grows and diversifies in Hamilton, and declines and ages in rural areas.



Sport, recreation and physical activity experiences will become less defined by age and more defined by 'life-stage.' There will be a need for flexible, age neutral experiences and communication.



Understanding the influences of each life-stage will be a powerful tactic in improving engagement.

THE IMPLICATIONS

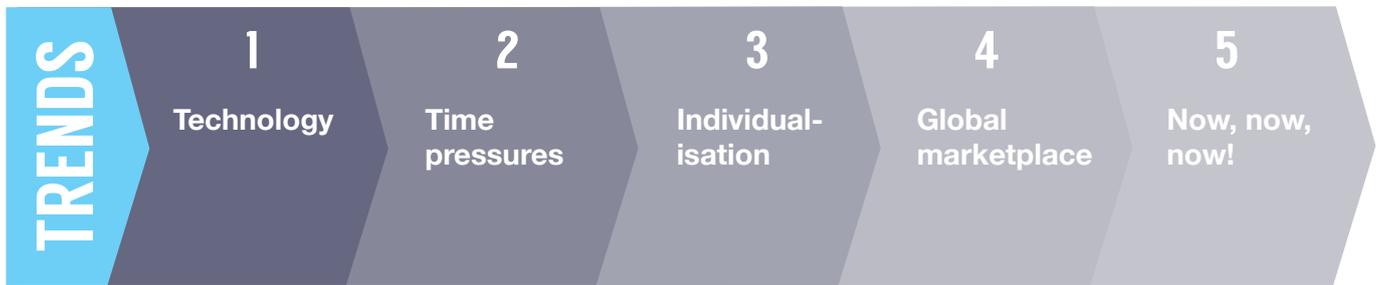


Ethnic diversity brings sporting diversity with new and emerging channels for delivery.



Changing family dynamics require experiences that cater to entire families and meet the needs of a time poor community.

CHANGING LIFESTYLES



THE FACTS



Online purchasing and a global market place are influencing consumer behaviour.



Convenience prevails in a time poor society.



People think and act independently, and are impatient for results.

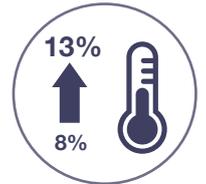


Traditional generations are blurring, as technology evens the playing field.



Sport is being consumed in the virtual environment, where we no longer have to be present to participate.

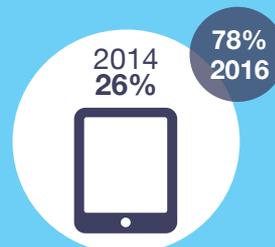
50% of the population are insufficiently active. Total cost of inactivity in the Waikato is more than **\$106m**. For Waikato adults, between 2007 and 2013:



Internet use is moving rapidly from desktop computers and laptops to **tablets** and **smartphones**.



64% of NZ adults age 15-65 own a smartphone



26% of NZ adults age 15-65 own a tablet

275,000



275,000 NZ adults consume sport on Facebook

10%



24%



11%



THE IMPLICATIONS

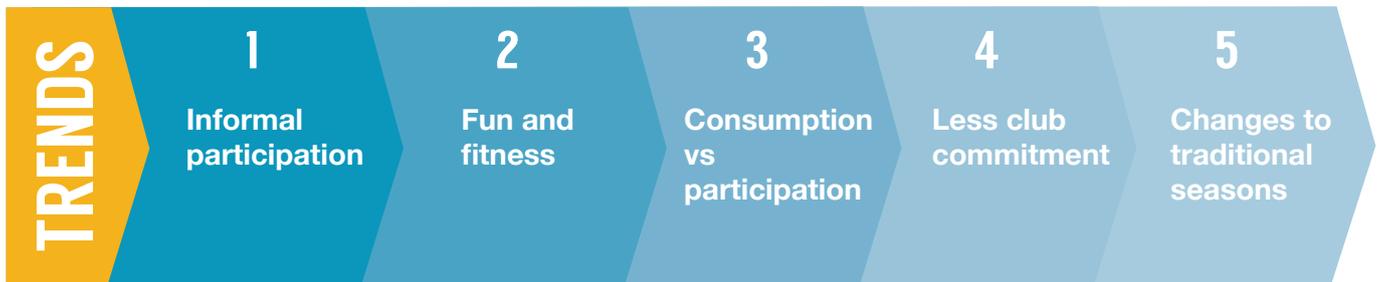


Sport, recreation and physical activity providers need to actively engage technology when identifying opportunities for communities to connect and be active in new ways.



Sport and recreation are increasingly being prescribed as positive solutions to remedy growing health issues such as obesity and diabetes.

CHANGING DEMAND



THE FACTS

The Waikato region is a leading hub for **community and high performance sport**:

4 NSOs

24 RSOs

1,039 Clubs



Fitness and relaxation are the main motives. Competition and social interaction are less important.



Participants are engaging through a greater **variety of channels** – traditional sporting structures, commercial operations, pay-to-play activities, events and casual outdoor activities.

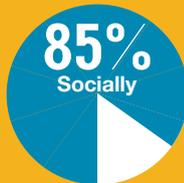


Lack of time is by far the number one reason participants give as a reason for not doing more. Cost comes a distant second.

All age and gender segments favour participating on their own or socially, with friends/workmates or family.



Pay-to-play offers flexibility in the level of commitment required, and an easier way to manage the expense.



Formal club memberships are declining, as members prefer to participate informally, socially and casually.

TOP 5 LOCATIONS:



Outdoors on water



Outdoors on roadways



Indoor sports facilities



At home



Outdoors in the bush

THE IMPLICATIONS



Sport, recreation and physical activity will continue to be shaped by consumer demands for informal participation.



New innovative forms of activity will grow to attract interest e.g. Futsal, T/20 Cricket, Parkour.

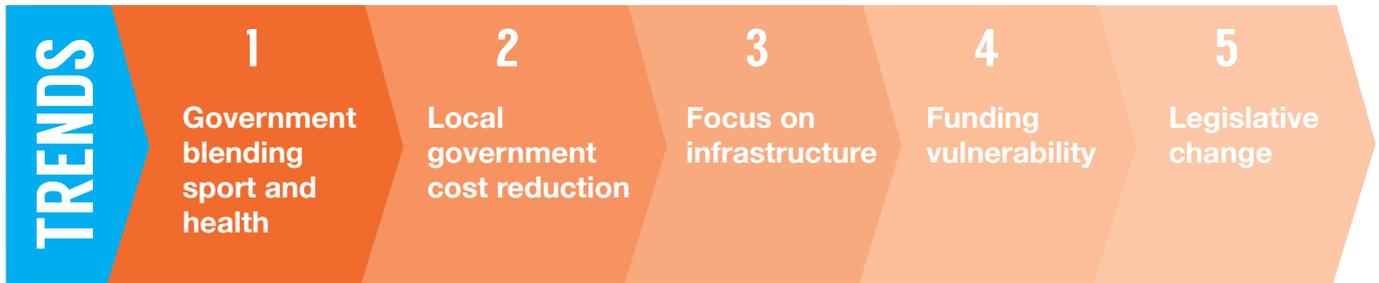


Traditional sports clubs will need to adapt their offer to remain sustainable.



Marketing of physical activity, recreation and sport needs to include elements of fun, fitness and relaxation.

CHANGING LANDSCAPE



THE FACTS



Political structures have changed. Minister of Health is also the Minister of Sport. Government is placing more emphasis on the cost of inactivity and health.



Local authority focus will continue to be on debt reduction and provision of core services.



Gaming funding sources are under pressure. Greater competition for Trust and Philanthropic funds will continue.

GAMING FUNDING 2012

Waikato received
\$6,827,188
Total funding



\$6,151,274
9% of NZ sport funding



\$675,914
8% of PA/recreation funding

DOWN 44% OR \$5M FROM 2010



Funders require a higher level of accountability before and after allocating funds.



Renewals and new facilities will focus on whole of life costs, multi-use and multi-purpose, as well as partnerships for investment.



Legislative change requires increasing compliance by clubs and organisations. New Health and Safety legislation is due in September 2015, and expected to impact on the provision of sport and sporting events.



Waikato Regional Sport Facilities Plan identified duplication of facilities and ageing assets.



Focus on health and wellbeing will grow in importance for our region.



Integrated initiatives that link sport, recreation, physical activity and health will be cross sector.



To gain financial support, health, sport, recreation and physical activity initiatives will need to be targeted and proven to result in quantifiable change.

THE IMPLICATIONS



Facilities planning will be more coordinated across the region. Decisions will be led by established need, not want.



More pressure to comply with legislative requirements, requiring a coordinated response.

CHANGING PARTNERS



THE FACTS



Private providers continue to grow in scale and number, across the region.



Sport New Zealand now includes Hamilton City, with its size and projected growth, as a metro focused priority.



Growing connection between health, sport and recreation is expected to continue.



Providers increasingly recognise the benefits of partnership and strategic collaboration.

There is a lack of centralised coordination across providers, for programmes and promotion to the community.



“The landscape for Waikato sport, recreation and physical activity is changing. Traditional sport is competing with entertainment and informal interests.

Success in our region will be measured by the health of our people and higher activity levels. Ensuring our place as a region with a proud history of sporting success requires collaboration and strong partnerships.”

- Sport Waikato CEO Matthew Cooper



“Our research tells us the sport system traditionally offered is no longer meeting the needs of many people. So we are putting participants at the heart of our decision-making.

We want to get clubs, councils, schools, families and any others involved in the local delivery of sport working more closely together.”

- Sport New Zealand CEO Peter Miskimmin

THE IMPLICATIONS



With more limited financial and support resources to go around, strategic partnerships are more important than ever.



Partnerships with education, at all levels, will be vital to reach young people.



Funders are looking to applicants to demonstrate strategic intent, and will have the desired outcomes.



Commercial providers would benefit from sharing investment to attract more people.

WHAT NEXT?

Sport Waikato are dedicated to fostering and brokering strong partnerships that inspire and enable the people of the Waikato to be active and healthy for life.

Moving Waikato 2020 is an educational resource that will be used to lead, inform and support decisions related to sport, recreation and physical activity over the next five years.

Sport Waikato invites you to comment and provide feedback on **Moving Waikato 2020**, to guide our strategic priorities for the region over the next five years. Together, we will plan and contribute to achieve an active regional community.

For more information or to provide comment please contact:

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Statistics in this document are sourced from the following market research and sector reports, utilising the most recent information available.

Active New Zealand Survey 2007/08 *Sport New Zealand 2009*

Active New Zealand Survey 2013/14 *Sport New Zealand 2015*

Census 2013 Waikato Region Report *North Central Region Cluster Analyst 2014*

Census 2013 *Statistics New Zealand 2014*

Community Sport Strategy 2015-2020 *Sport New Zealand 2015*

Consumer and Media Insights Survey October 2013 - September 2014 *Nielsen 2015*

Consumer Profiles *Gemba 2014*

Costs of Physical Inactivity *Wellington Regional Strategy, Waikato Regional Council, and Auckland Council 2013*

Enhancing Sports Consumption Via Digital Channels *Gemba 2014*

Future of Sport in New Zealand *Sport New Zealand November 2014*

Gaming Funding into the Sport and Physical Activity/Recreation Sector 2012 *Sport New Zealand 2014*

New Zealand Health Survey 2011-2013 *Ministry of Health 2014*

Regional Insights Report *Gemba 2013*

Sport Waikato Activity Supplement, Young People's Survey 2011 *Sport New Zealand 2013*

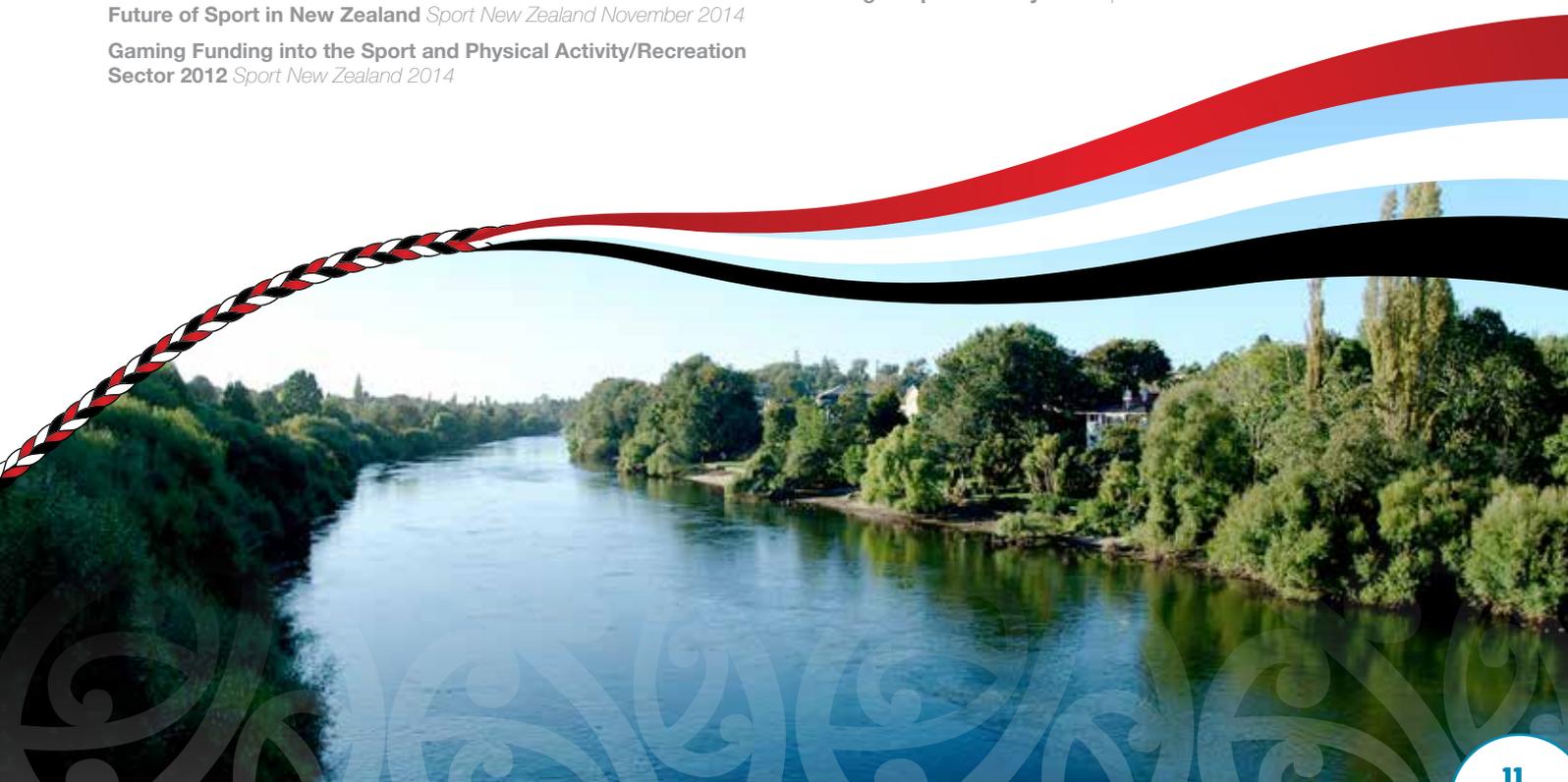
Sport, Recreation and Physical Activity Profile: Waikato Region 2007/08 *Sport New Zealand 2009*

The Economic Value of Sport and Recreation to the Waikato Region *Sport New Zealand 2011*

Waikato Region Demographic Profile 1986-2031 *NIDEA, University of Waikato 2013*

Waikato Regional Profile Young People's Survey 2011 *Sport New Zealand 2013*

Young People's Survey 2011 *Sport New Zealand 2013*





sportwaikato
out there and active

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