



ROLES AND RESPONSIBILITIES REVIEW

STAGE 1 REPORT

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PURPOSE OF THIS REPORT

The purpose of this report is to capture the outcomes from Stage 1 of the Tennis in New Zealand Roles and Responsibilities Review. Stage 1 focuses on developing a clear and agreed picture of the current state of tennis particularly with regard to actual and perceived roles and responsibilities of the different organisations.

SUMMARY

Working group members:

Jo Grimwood	Ops Manager Tennis Southland Association
John Penny	Board member Tennis Waikato Bays
Leonie Dobbs	Board member Tennis Central Region
Dale Harrison	Former Chair of Northcote Tennis Club
Lesley Ferkins	Board member Tennis NZ
Jenny Fitzmaurice	Head of Participation and Coaching Tennis NZ
Ross Morrison	Board member Tennis Seniors
Julie Paterson	CEO Tennis NZ
John Gardiner	Coach Marlborough Tennis
Amanda Hopkins	Board member Tennis Auckland Region – retired August 2018
Ian Douthwaite	Board member Tennis Canterbury Region – replaced Chris Bailey
Marcus Reynolds	CEO Tennis Auckland Region – replaced Brent Robinson/Amanda Hopkins

The Working Group have met in person twice and have had numerous conference call meetings.

Engagement with the tennis community has included a consultation tour of 19 sessions in 14 centres around New Zealand, a survey to all participants of tennis and ad hoc discussions. In addition, the Working Group have reviewed various analysis that have been done in tennis over the past few years, and reports on sport in general.

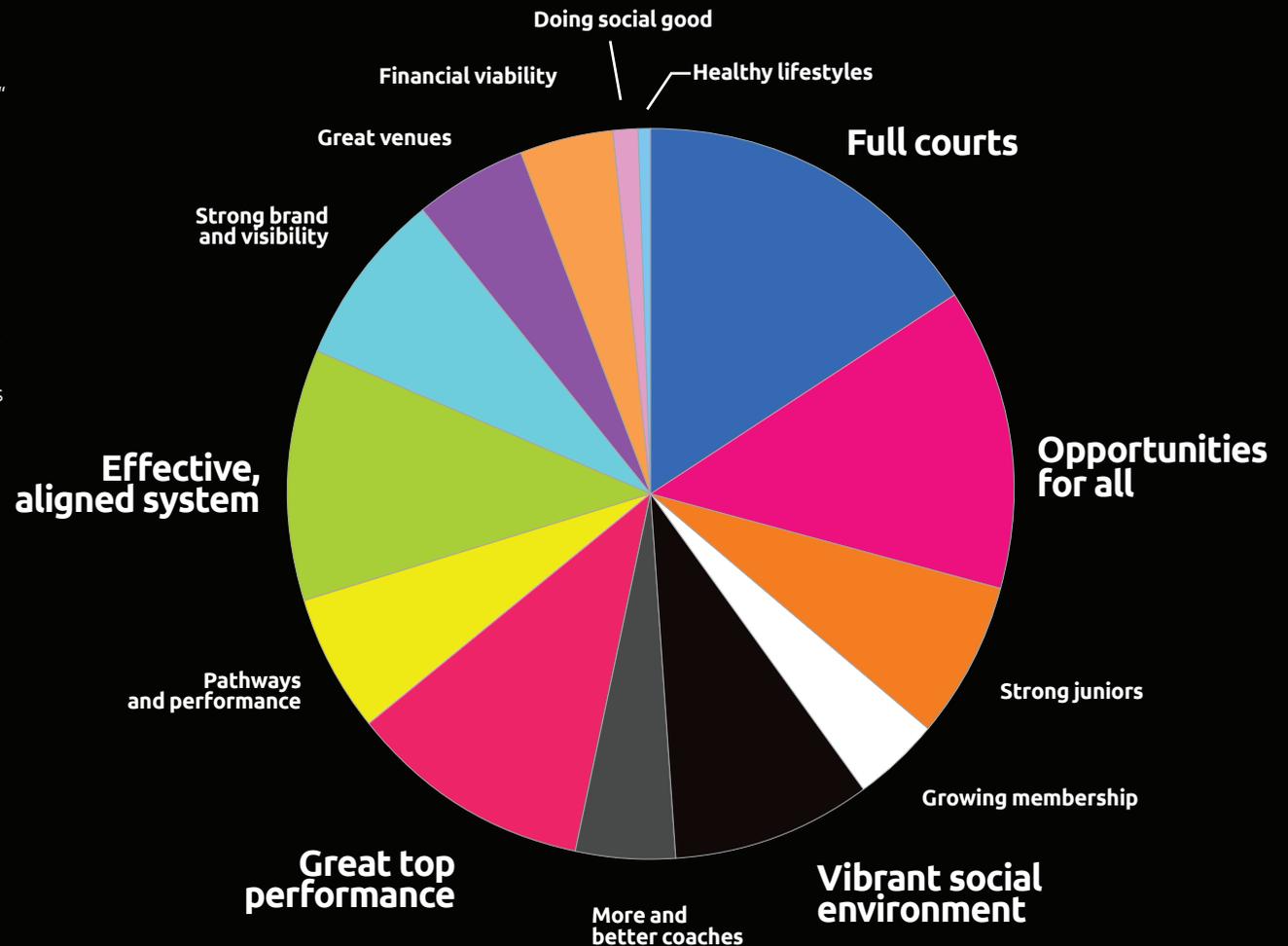
Overview of Stage 1 | Focus Areas for Stage 2

STRATEGIES	ENABLE  Supporting Clubs and Communities to flourish through tennis	WIN  New Zealand players are winning on the international stage	SECURE  Tennis is a well funded business and has a system that enables growth
KEY FINDINGS	<ol style="list-style-type: none"> 1. There is a general belief that tennis in New Zealand is not aligned, in terms of the inconsistent purpose and responsibilities of Regions and Associations, and a call for stronger leadership from Tennis NZ. 2. Associations are struggling in some cases to show value to their clubs. This is particularly pronounced in cases where an Association has facility responsibility. 3. Regions have evolved into three different models, and with one exception are largely focussed on the assembly of representative teams. This is not consistent with the constitutional aims of the Regions. 4. The role of coaches and their relationship with their clubs and their business is sometimes in conflict. These relationships are highly inconsistent and not always to the benefit of tennis in general. 5. The culture and some core beliefs of tennis may present obstacles in maximising participation. There was cited a culture in tennis of ‘exclusivity’ and that it was ‘not aligned with wider NZ’ sports. 6. Membership and the change to casual play is a struggle for many clubs, and even where it is believed to be important, implementation is challenging either because of conflicts with members or coaches, and/or a lack of capability and tools. 7. There is a need for a strategic approach to facility management across the country, both in understanding the purpose and ownership of large ‘regional’ (or Association) facilities, and in club capacity in general. The role of Tennis NZ and others is critical to understand. 8. Promotion of tennis in general in New Zealand, and to improve the image and profile of tennis were considered of great importance, including national marketing of participation programmes. 9. Capability toolkits would be of real benefit to Clubs and Associations – including programmes, compliance, business models, marketing and administration. This was the most consistent request for change. 10. National programmes (Tennis Hot Shots, Cardio and Tennis Xpress) are very well regarded, , and these should be better promoted and supported. 		
FOCUS AREAS FOR STAGE 2	<ol style="list-style-type: none"> 1. Gaining a clear understanding of our Tennis mental models to set the foundation for how we think about tennis, what we truly believe is important in tennis, and therefore the direction for tennis in the future. 2. Determine the future of Regions, both in terms of their functional and governance roles. 3. Clarify the expectations of Associations, especially considering their relationship with their Clubs and in some cases their dual role as facility owners/ managers. 4. Consider the role of the different organisations (Tennis NZ, Regions, Associations and Clubs) in providing and developing new delivery and business models, consistency of approach across both tennis delivery models, and administrative and compliance activities. 5. Confirm the role of the Affiliate organisations, in relation to activities that Tennis NZ performs now and under the recommendations from this process, and their relationship with the Associations and Clubs. 6. Culture, perception and marketing of tennis has been identified as a possible constraint to the growth and development of tennis in New Zealand. Consideration of the responsibilities of the different organisations in this area is critical, however discussions on desired changes (or otherwise) in this area need to take place prior to further responsibility considerations. 7. Define the different responsibility areas of facility management from strategy through to delivery and consider the different organisational responsibilities in the context of the current challenges many face in facility management. 8. Restate the role of coaches in tennis in New Zealand, their responsibilities across the tennis value chain and their relationship with tennis Clubs and one another. 		
STRENGTHS	Great coaches Social Junior tennis Engaged committees Senior tennis Committed administrators Hot Shots New tennis options Schools and community working together Tennis is very accessible Wide age and gender appeal Quality and number of facilities Business house		

WHAT DOES SUCCESS LOOK LIKE

The following was drawn from responses during the consultation and the survey.

- “Full courts.”
- “We are all on the same page and here for the good for the game.”
- “A culture change that supports casual access etc.”
- “Everyone owning a racquet and getting out.”
- “Influence of coaches on people’s whole lives, not just in tennis.”
- “Happy tennis players of all ages.”
- “More numbers through the ages – esp. for younger teenagers.”
- “New ways of getting into the game, especially for young people.”
- “We don’t have to reinvent the wheel all the time – can share ideas and best practice.”
- “Clubs bursting at the seams – and being great on and off the court places to be at socially.”
- “Families going together.”
- “People having a lifelong love of tennis.”
- “Facilities that aren’t deteriorating.”
- “Clubs working together.”
- “More competitive internationally.”
- “Fun, enjoyment in participating.”



BACKGROUND

Why the review

The objective of the structural review for tennis in New Zealand is to identify the optimal sustainable delivery model and governance structure for Tennis in New Zealand to support the agreed Strategic Framework, considering the roles, responsibilities and capabilities of the different entities responsible. In other words, what is the most effective and efficient way to organise ourselves to give effect to the Strategic Framework.

The scope includes:

- Definition of the issues, risks and strengths of the existing delivery model and governance structure.
- Development of an optimal delivery model that represents the tennis market and governance structure, taking specific consideration of the strengths of what we have today and the needs moving forward to achieve our Strategic Framework. This will include a clear definition of the roles and responsibilities of the different entities in Tennis.

- Determine the changes required to support the agreed model and governance structure.
- With respect to the existing organisations, all aspects are in scope including Tennis NZ, Regions, Associations, Clubs and Affiliates.

The delivery model and governance structure of tennis includes:

- The organisations/entities involved in tennis.
- The roles and responsibilities of these entities.
- Communication and engagement protocols, both formal and informal, necessary for the effective functioning of the delivery model.
- The governance structure required to support this.

There is a recognition that a one size fits all approach is unlikely to be the outcome considering the diversity of population and geography in New Zealand.

Underlying the review outcomes will be the definition of a set of key principles or mental models that will drive thinking and decision making.



Tennis in New Zealand Strategic Framework

The Roles and Responsibilities Review is done within the context of the Tennis in New Zealand Strategic Framework. The Strategic Framework was confirmed by the Tennis NZ Board in October 2017 and takes tennis through to 2022.

Our strategic objectives

Tennis NZ, working collectively with the tennis community, aims to achieve the outcomes described to the left. All of our work and monitoring of progress will be designed around fulfilment of these objectives.

Maiden Committee report

Presented here is a summary of the Maiden Committee report and outcomes. This is critical in the context of this review as it was the recommendations of the Maiden Committee to implement the regional structure and change membership of Tennis NZ from the Associations to the Regions.

The governance changes were implemented, however the structural and role changes were partially implemented and, in some cases, reversed. This incomplete change resulted in the structure we see today – see page 10.

At the 2005 AGM of New Zealand Tennis, the Council resolved in principle to restructure into a consolidated regional model from the existing association model. The Council established a committee (“The Maiden Committee”). This ultimately resulted in the change from Association membership of Tennis NZ to the Regional membership structure. It is important to consider this activity in the context of the current review.

The Committee work included a survey of members, the key findings of which were for change including:

- Strong national leadership
- Consolidation of current Associations
- Improved constitutions
- Working as one team with regional autonomy
- Increased funding
- Increasing tennis participation
- Improved high performance programme
- Improved coaching programmes
- Improved marketing/promotion and tennis public profile
- Improved communication
- Improved uniformity of approach
- Improved management/staff capability
- Improved delivery of national programmes
- Improved support for regions, clubs and volunteers
- Improved facilities management

With the exception of “Consolidation of current Associations”, “Improved constitutions” and “Working as one team with regional autonomy”, these findings are consistent with the Roles and Responsibilities review findings.

The rationale for change from the Maiden Committee was –

“... such that constitutions and strategic planning are aligned, decision making is improved and there is consistent delivery of national programmes.

“The current legacy structure of Tennis NZ and 25 independent Associations has led to an overly fragmented tennis administration... the present unacceptable performance of tennis in New Zealand must be the catalyst for change.

“In short, the proposed restructure will provide a sound foundation to develop new strategies and new initiatives.”

The role of the Regions was described as –

“...to deliver national strategies regionally. In other words, Tennis NZ will administer and monitor the development of STRATEGY following consultation with the tennis community and monitor the consistent delivery of the regional programmes. Regional Centres will be responsible for DELIVERY of all tennis in the area to the standards, measures, and specifications of the national strategic plans.”

Related initiatives

There are three related initiatives running concurrently:

A review of the **national tournament structure** is outside the scope of this review, however any implications to the tournament structure as a result of the recommendations from this review need to be clearly highlighted.

A **national facilities framework** is being developed by Tennis NZ, in conjunction with key facility owners/operators. This framework document will be a valuable tool to support conversations with funders and councils around the country and will provide a snapshot of existing facilities and future needs.

The **national affiliation fee structure** is being reviewed. Affiliation fees came up a number of times during the consultation, questioning the value received either from the Association or Tennis NZ or in a few cases, refusal to pay. In general, even though there was some questioning of the value, there was acceptance of the necessity.

It is useful to note that there have been concurrent discussions with a few of the affiliated organisations as to their role in tennis in New Zealand, especially with considering the responsibility of Tennis NZ and in some cases Associations.

NEXT STEPS

Communication of Stage 1 outcomes

A summary of this report will be sent to all Regions and Associations, with the request to forward this summary to all their clubs and to actively seek discussion on the report.

A consultation process is included in this communication to seek feedback from Regions and Associations on their view of the report findings and focus area for stage 2.

Presentation of these findings along with proposals for discussion will be presented in October 2018 at the Tennis NZ AGM.

Focus areas for Stage 2

In considering proposals for change, the Working Group believe the focus needs to be:

- Gaining a clear understanding of our Tennis mental models. These set the foundation for how we think about tennis, what we truly believe is important in tennis, and therefore the direction for tennis in the future.
- Determine the future of Regions, both in terms of their functional and governance roles.
- Clarify the expectations of Associations, especially considering their relationship with their Clubs and in some cases their dual role as facility owners/managers.
- Consider the role of the different organisations (Tennis NZ, Regions, Associations and Clubs) in providing and developing new delivery and business models, consistency of approach across both tennis delivery models, and administrative and compliance activities.
- Confirm the role of the Affiliate organisations, in relation to activities that Tennis NZ performs now and under the recommendations from this process, and their relationship with the Associations and Clubs.
- Culture, perception and marketing of tennis has been identified as a possible constraint to the growth and development of tennis in New Zealand. Consideration of the responsibilities of the different organisations in this area is critical, however discussions

on desired changes (or otherwise) in this area need to take place prior to furthering responsibility considerations.

- Define the different responsibility areas of facility management from strategy through to delivery and consider the different organisational responsibilities in the context of the current challenges many face in facility management.
- Restate the role of coaches in tennis in New Zealand, their responsibilities across the tennis value chain and their relationship with tennis Clubs and one another.

Outcome from Stage 2

As per the terms of reference, the outcome from Stage 2 will be a recommended optimal delivery model and governance structure, taking specific consideration of the strengths of what we have today and the needs moving forward to achieve our Strategic Framework. This will include a clear definition of the roles and responsibilities of the different entities in tennis.

Timeline

September, 2018	Communication of Stage 1 outcomes
	Development of proposals for discussion by the Working Group
October, 2018	Presentation and discussion of proposals at AGM
2018-2019	Meetings and workshops around New Zealand to discuss local implications of the proposals
2019	Agreed changes embedded across Tennis in New Zealand

KEY PRINCIPLES/ MENTAL MODELS

A mental model is an overarching term for any sort of concept, framework, or world view that you carry around in your mind. Mental models guide our perception and behaviour. They are the thinking tools that we use to understand life, make decisions, and solve problems. Mental models include beliefs, ideas, images, and verbal descriptions that we consciously or unconsciously form from our experiences that guide our thoughts and actions.

>> NOTE: further discussion and refinement of this is necessary, considering comments from consultation.

MENTAL MODELS OF TENNIS	KEY PRINCIPLES
<ul style="list-style-type: none"> • Time to play as long or as short as you want, whenever you want • Striving to get better – personal performance/challenge • Enjoyment • Affiliation – part of a group. This can be a barrier for people coming into tennis. • Professional coach delivery • Escapism • Individual experience – memories • Family friendly • Fitness, health and general well being • Any age • Any gender • Global footprint • Lifelong friendships – comradery • Likeminded people – meeting people – social opportunity • Discipline, focus, commitment • Free? Accessibility? Is this something we want? 	<ul style="list-style-type: none"> • Attracting great people to support tennis (boards/committees etc) • Sharing the leadership across our system • Inviting commitment • Tennis NZ facilitating not controlling • Tennis NZ resourcing and guiding • Sharing expertise, supporting the entities in our system • Putting effort in relationships • Promoting innovation, self-organising but with overarching guidance/framework (from Tennis NZ) • How can Tennis NZ add value to the system?

THE CURRENT STATE OF TENNIS IN NEW ZEALAND

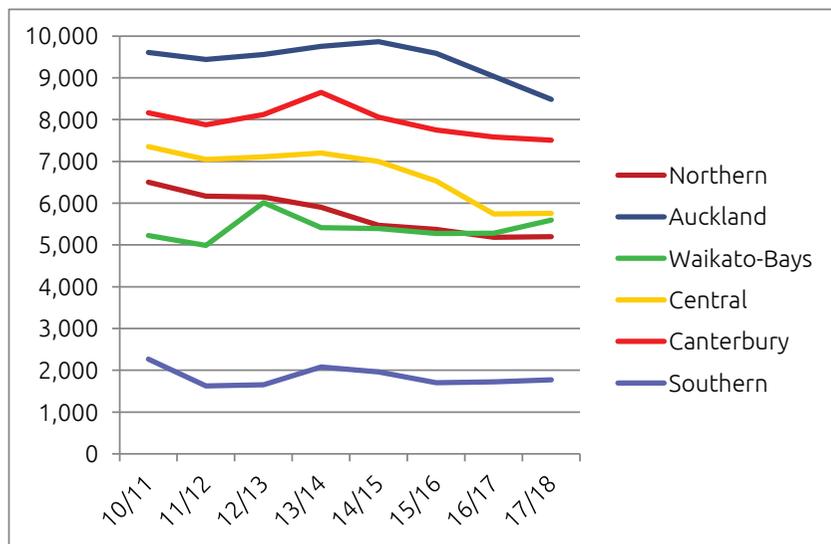
REGIONS	ASSOCIATIONS	SUB ASSOCIATIONS	CLUBS	MEMBERS	NOTES
Northern	Northern – Auckland's North Shore (Region) Northland		49	5,195	Northern Region operates primarily on Auckland's North Shore. Ad hoc communication and invitations for events are made to the Northland Association, otherwise Northland operates independently. The Northland Association services only the Whangarei metro area. The Northern Region and the Northland Association manage facilities
Auckland	Auckland (the Region) Counties Tennis		57	8,483	Auckland Region is essentially a single Association region as Counties Manukau operates largely independently. Auckland Region manages multiple facilities.
Waikato Bays	Waikato Thames Valley Tennis Eastern Bay of Plenty Western Bay of Plenty		54	5,598	Waikato Bays Region exists fundamentally on paper only. The Chairs of the Associations take turns to chair the Region and attend to compliance issues. The Associations operate completely independently. A trust in Waikato Thames Valley manages a facility.
Central	Wellington/Kapi Mana Taranaki Manawatu Wairarapa Hutt Valley Wanganui	North Taranaki South Taranaki	81	5,757	Central Region acts as an Association supporting the Wellington and Kapi Mana clubs, and fulfils regional responsibilities working with these Associations. In recent times Central has instigated meetings with the associations for collaboration and communication. Central is confirming an MOU to define its regional responsibilities. The Wellington Association still exists as the owner of the Renouf Centre. The Central Region manages the Renouf facility.
Canterbury	Canterbury (the Region) Nelson Bays Marlborough West Coast	Hurunui Ellesmere Mid Canterbury North Canterbury Malvern	116	7,510	The Canterbury Region is effectively the original Canterbury Association with a focus on metropolitan Christchurch, the rural Canterbury clubs are fairly autonomous as are all the Associations in the area. A trust owns the Christchurch facility, formerly owned by the Canterbury Association. Canterbury Region manages the Christchurch facility.
Southern	Southland Otago North Otago South Canterbury	Southern Lakes	63	1,775	Southern Region exists fundamentally on paper only, with compliance primarily managed by the Otago Association. The Associations in the area act completely independently. Otago and South Canterbury manage facilities.

Participation and membership levels

Membership levels have reduced by 12% nationally during the 7-year period from 2010/11 to 2017/18. The largest percentage declines have been in the Central and Southern regions, with Waikato Bays experiencing growth of 7% over the period.

The overall decline has been steady, but year-on-year decline has been inconsistent, including two years of increased membership.

Membership trends 2011-2018



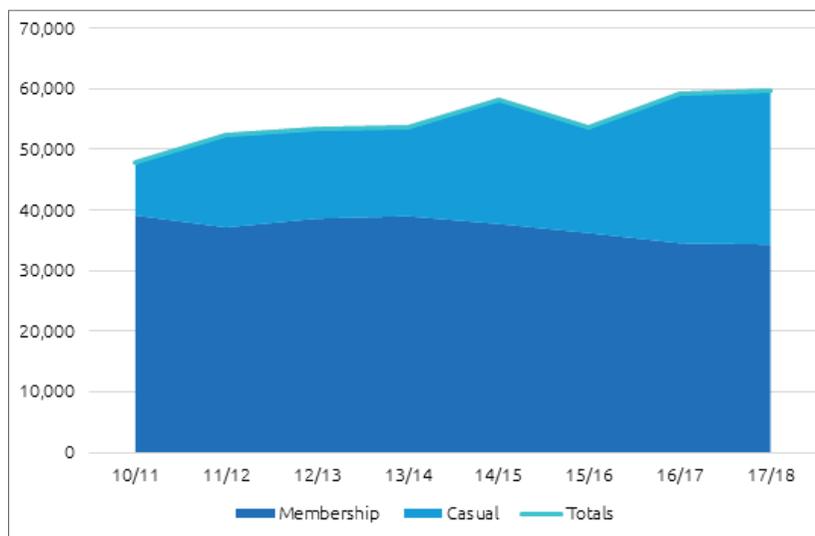
This decline in membership is steadily shifting to an increase in casual players. Note, the graph represents player numbers only. Ideally understanding what this means financially and in terms of court capacity for clubs and associations is important analysis.

Year on year change

2011-12	- 5.0%
2012-13	+ 3.9%
2013-14	+ 1.0%
2014-15	- 3.2%
2015-16	- 4.0%
2016-17	- 4.6%
2017-18	- 0.7%

Over 30 years from 1985 – 2015, we see a 39% decline in membership, which is even more significant considering the population of New Zealand increased by 30% over this same period.

Membership to casual shift



Performance

Tennis NZ currently operates a four-person performance team; High Performance Director, National Coach, Development Coach and Physical Performance Coach. In addition, Tennis NZ retains the services on a contractual basis of Davis/Fed Cup Captains and a small number of travelling coaches with our age-group representative teams.

Auckland, Northern and Canterbury have varying levels of capacity in their regional performance programmes, with Central currently in the process of establishing a regional performance programme. Tennis Auckland has the only full-time commitment in performance and Tennis NZ and Tennis Auckland have begun a 12-month trial joint venture to fund a Development Coach position.

Tennis NZ have identified the need to ensure there are quality coaches at all levels of the game ranging from volunteers, participation to performance coaches and are now working to bridge the gap between participation and high-performance coach development. There are significant gaps in the quality and quantity of performance coaches throughout the country.

At the national level, Tennis NZ's role in talent identification is through the running of specific identification camps and coach attendance at pinnacle national events – primarily National Championships and Masters series events. Tennis NZ has also established criteria and benchmarks for a national performance programme as well as framework for regional programmes. The specificity, care, and understanding required to create the follow through from identification through development to performance is a major gap throughout the country. There are very few environments throughout New Zealand currently doing this at the level required and the regional programmes have most likely historically underperformed.

Tennis NZ plays a role in supporting New Zealand players based locally and overseas and this varies for different athletes at different stages of their developmental journeys. Support for leading juniors is delivered in various forms including full duty of care, pastoral support, significant travel, parental education, training and competitive support for extensive periods of time whilst abroad.



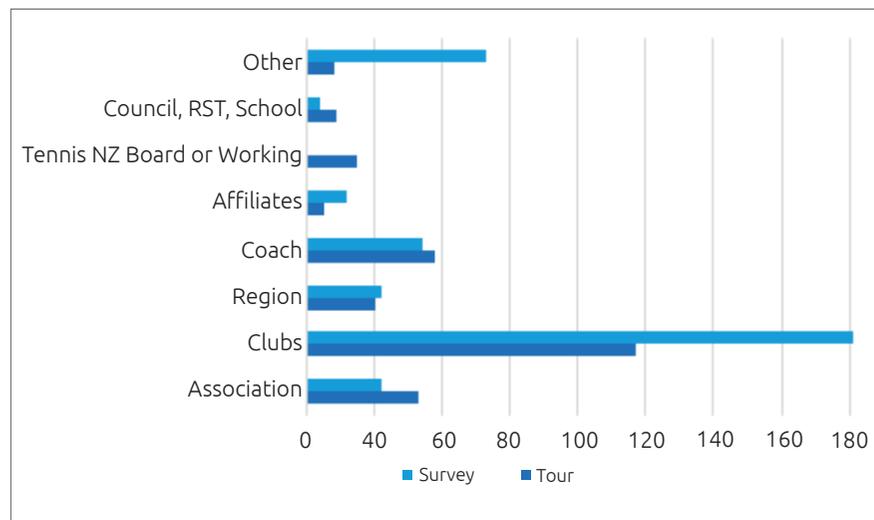
TENNIS COMMUNITY VIEW

The Tennis community view was developed from a Consultation Tour in April/May 2018 and a survey that ran concurrently.

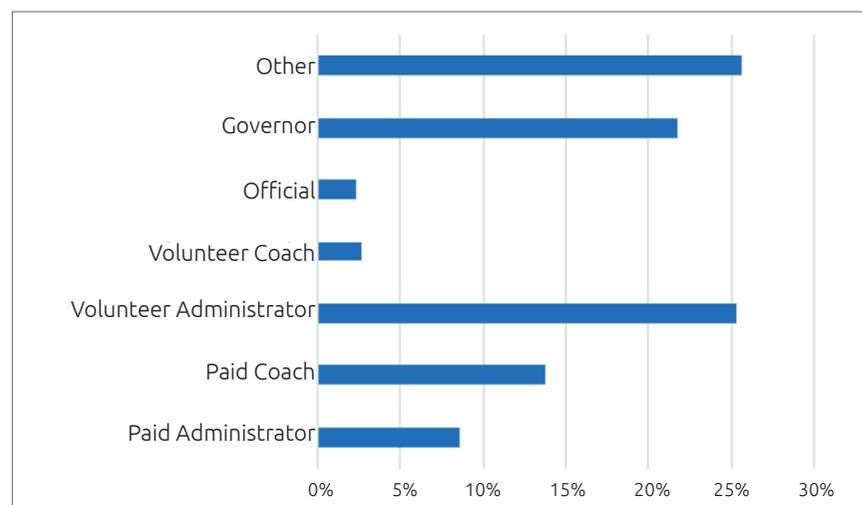
The Consultation Tour included 19 sessions in 13 centres, with 225 attendees in all. The survey had 304 respondents. The types of stakeholders engaging breaks down as follows.

In the case of the survey, responders were also asked their specific role within the organisation.

Responses by organisation type



Responses by role (survey only)



What is working well

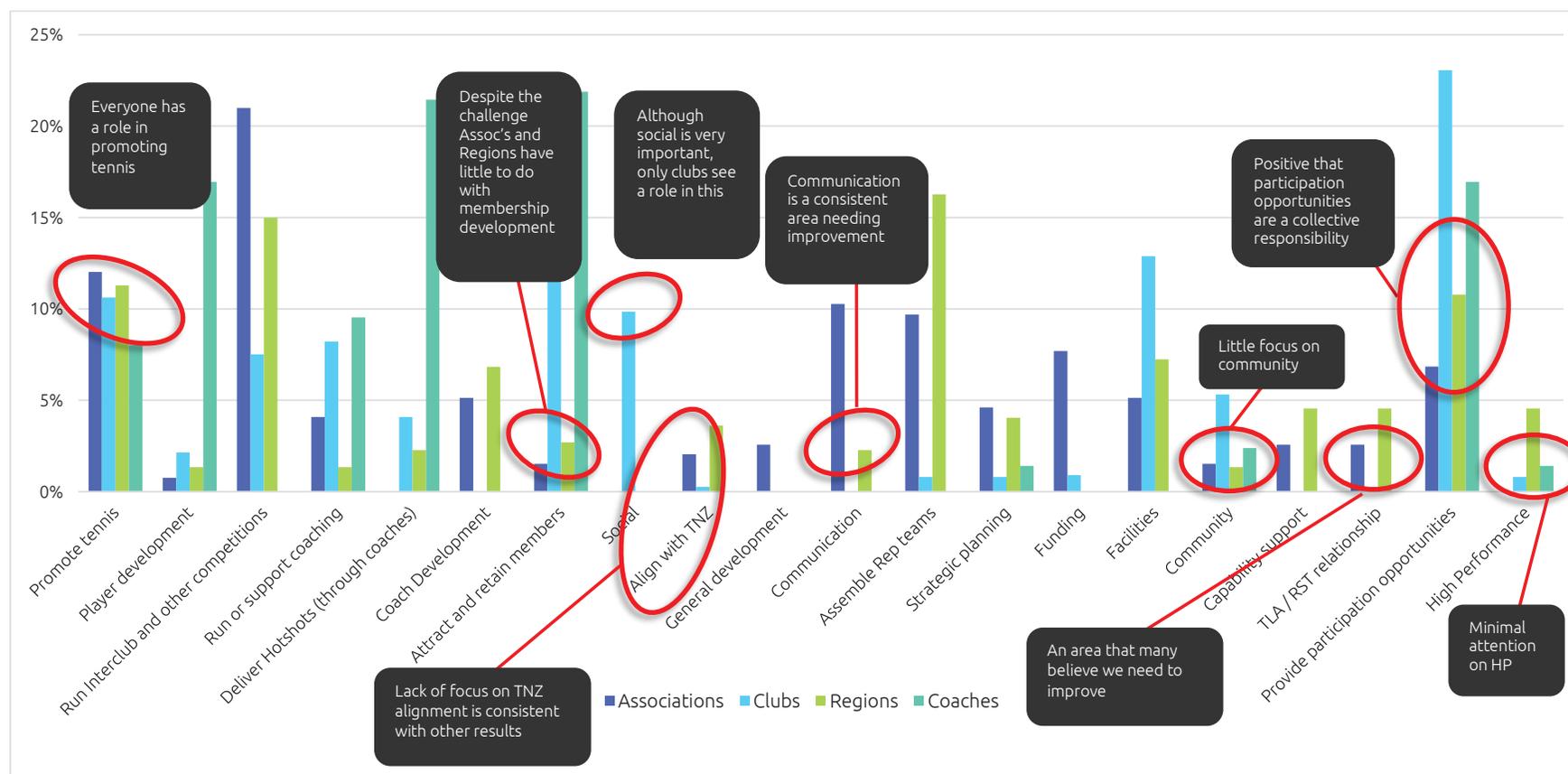


Understanding of the roles in tennis in New Zealand

This section summarises responders understanding of the roles of the organisations in tennis.

Perceived responsibilities

The following chart shows responses regarding what people believed their organisation (or individual in the case of coaches) responsibilities were.



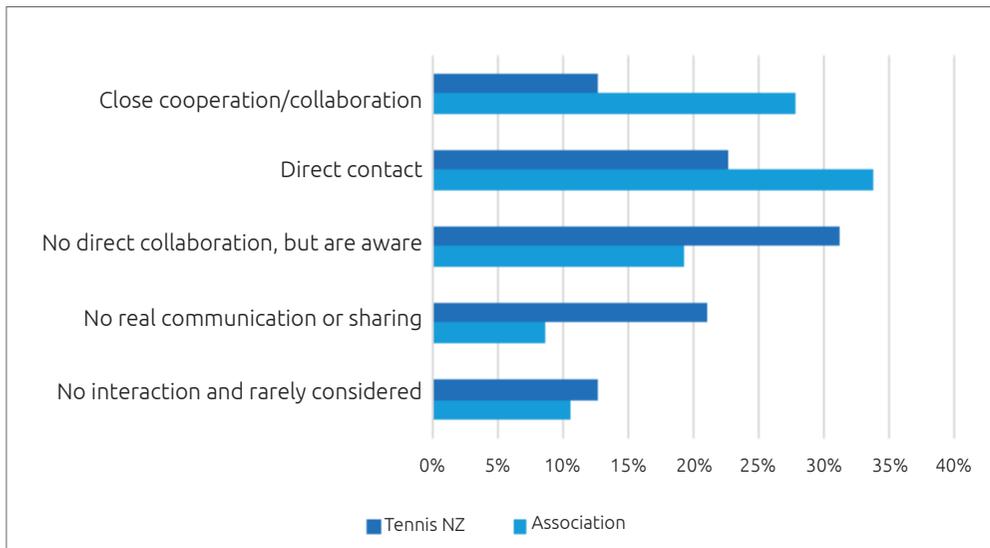
Degree of interaction with the different primary organisations in tennis

Almost all responders to the survey (97%) are aware of Tennis NZ, with more than half (58%) having an in-depth or high-level understanding of Tennis NZ’s role. 35% have some direct collaboration with Tennis NZ. Most of this interaction is infrequent or ad hoc, with only 26% describing the relationship as effective, and 30% describing it as not effective.

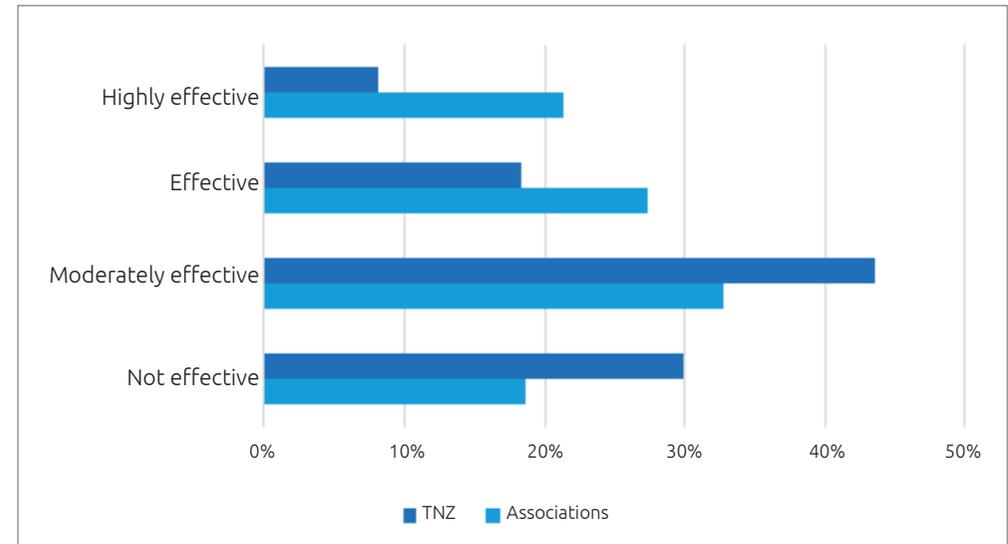
Considering the responses regarding the Regions and Associations it is clear that the difference between these two organisation types is very unclear and the understanding of the responsibilities of each is not clear. As such, we have presented data below on the perceptions

of Associations only. The majority (70%) understand the Associations role and most (61%) have direct connections with their Association, with only 10% saying they never have any interaction. More than half have frequent interactions, with roughly half describing these as effective or highly effective.

Degree of interaction with TNZ and Associations

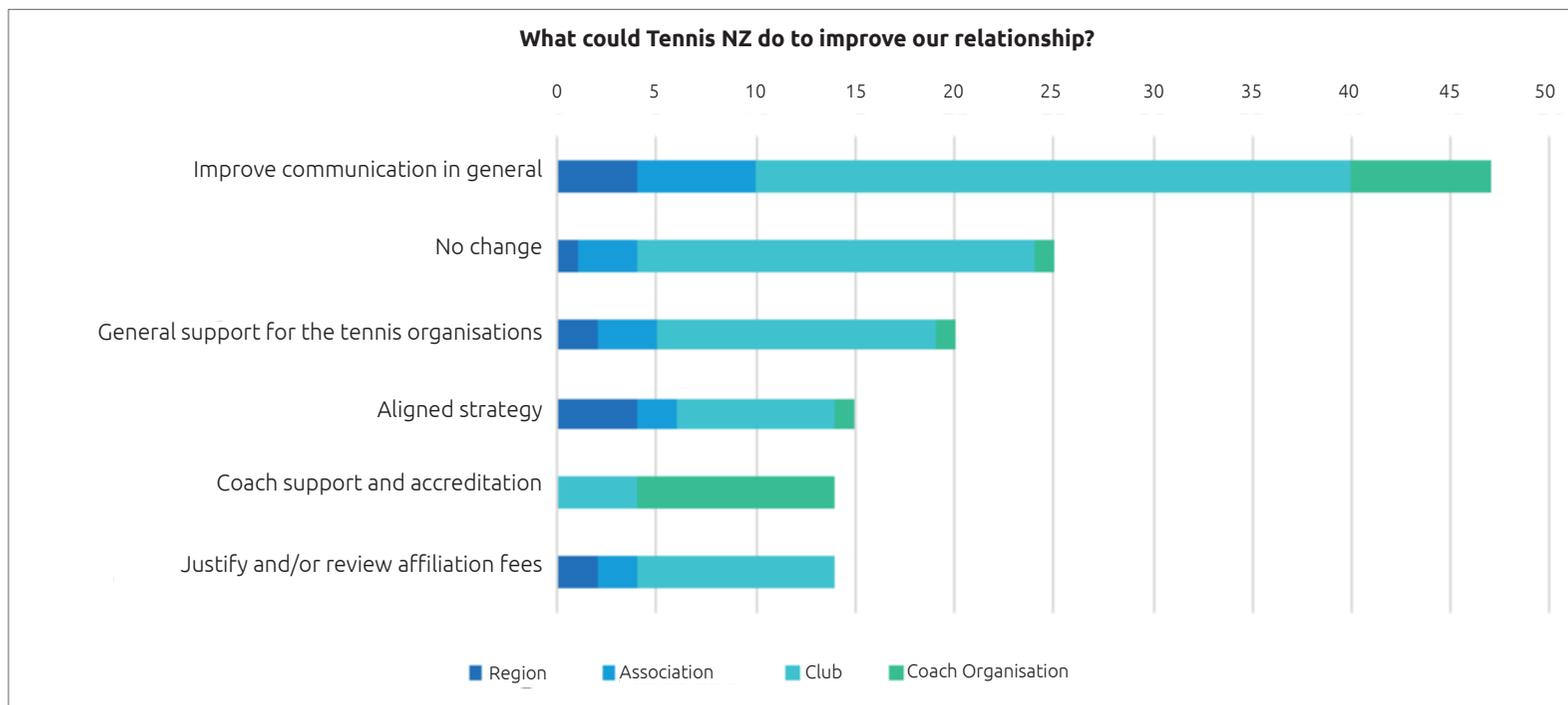


Effectiveness of relationship



Given the role of Tennis NZ today, the degree of interaction response is to be expected, however, 74% describe the effectiveness of the Tennis NZ relationship as only moderately or not effective.

In considering ways that interactions with Tennis NZ could be improved, there were a number of suggestions, with communication in general being the biggest area for improvement.



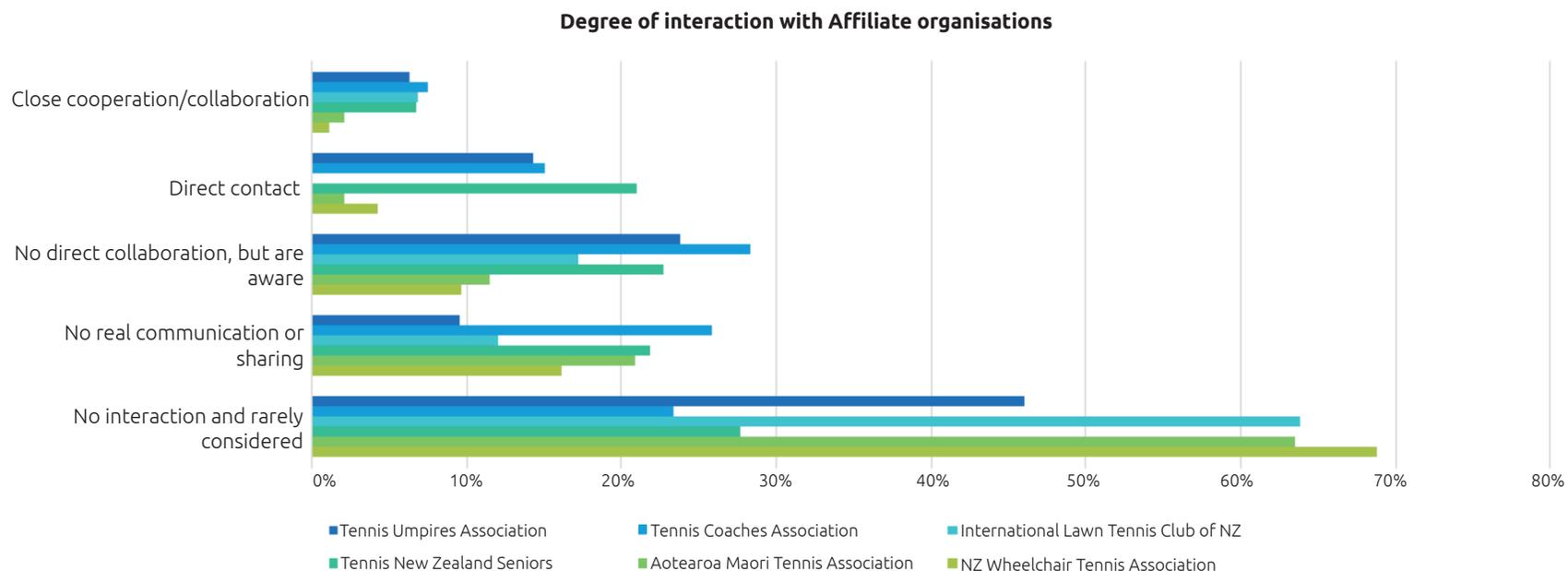
With respect to areas for improvements with Associations and Regions, there were only a small number of responses. The key themes were:

- Increase partnership
- Presence at club events
- More involved leadership
- Support and assistance

Interaction with Affiliates

With the exception of the International Lawn Tennis Club (32%), most people are aware of the Affiliate organisations, with awareness greatest with Seniors, Umpires and Coaches (around 70% in each case).

The level of interaction is generally low, with the exception of Seniors and Coaches, more than half of responders had no communication or interaction, with the least interaction with Wheelchair and Aotearoa Maori at 85%.



Further analysis of the Tennis Coaches Association response shows a misunderstanding of the role and function of this organisation, and therefore it is difficult to assess the validity of these responses.

General themes on how the various Affiliates could improve their relationship with the tennis community:

- Communication in terms of their purpose and achievements; and
- Develop specific opportunities to interact with the rest of the tennis community.

GENERAL FINDINGS AND IMPLICATIONS

The following section describes the ten core themes identified during the consultation tour, including the key findings and implications of these.

FINDINGS	IMPLICATIONS
<p>Alignment of tennis in NZ</p> <p>There is a general (but not universal) belief that tennis in New Zealand is not aligned. This lack of alignment was stated in terms of the inconsistent purpose and responsibilities of primarily Regions, but also Associations as well as a sense of being “directionless” and “highly fragmented”. There was a consistent call for stronger leadership from Tennis NZ.</p> <p>The majority do understand the overall structure and the intended roles and purpose of the different entities. However, specific concerns were raised in areas where there was greater dysfunctionality.</p> <p>In some cases, a lack of alignment was less of a concern where the clubs or associations involved operated in a more isolationist mode.</p>	<p>Although there may be alignment at the highest level of strategic objectives, the fragmentation and lack of collaboration and connection will make it challenging to deliver an aligned strategic outcome</p> <p>Inconsistency of approach to actioning strategic objectives will result in varying levels of efficiency and effectiveness – understanding what is working well and how to extend this is important.</p> <p>Due to the regional variations in New Zealand including geography, population distribution etc. a single, complete delivery model will not work, but consistency of an overarching approach to core aspects should be achievable.</p> <p>The current governance structure is not working effectively in creating alignment.</p>
<p>Associations are struggling in many cases to show value to their clubs.</p> <p>The perceived quality of delivery of Associations to Clubs varies considerably. At a minimum Associations provide minimal interclub competitions and at the other end provide significant sport and capability opportunities to their clubs, take a lead in local fundraising and actively promote tennis in the area.</p> <p>A theme emerged that Associations which managed a facility generally had a poorer relationship with their clubs, due to a focus on maintaining the facility, and in some cases competing with clubs for participants. In some cases, clubs resented their affiliation fees being spent to maintain a facility that they didn’t use or competed against them.</p> <p>Presence, leadership, communication, support and assistance are the topics that clubs are primarily seeking improvements with in their relationship with Associations.</p> <p>Associations which encompass metropolitan and rural areas tend to prioritise the needs of the metropolitan area, for example providing interclub only to clubs in the metro and relying on rural clubs to self-organise.</p> <p>Club collaboration is generally low, unless the Association is taking a leading role. Coupled with the finding that generally clubs deliver, not specifically to community need, but rather to the view of the club committee, results in often poorly served communities.</p> <p>The result of this is some Associations struggling to ‘sell’ their value to their clubs and in some cases a dysfunctional, or at least disconnected relationship develops between the Association and Clubs.</p>	<p>Consideration of the role of sub-Associations in supporting geographically diverse Associations.</p> <p>Where the Associations can support clubs in capability the relationship is perceived very positively.</p> <p>Further examination of the challenges faced by Associations managing facilities and concurrently supporting the club environment.</p> <p>Consideration of models for associations with both metro and rural clubs that work effectively.</p> <p>Club collaboration has historically been low, but if this can be improved represents a good opportunity. Should Associations be driving this collaboration where there is not self-organisation?</p>

FINDINGS	IMPLICATIONS
<p>Capability and capacity of Club (and Association) Administration is a struggle, including concerns with supporting casual participation</p> <p>Attracting club volunteers was an often-cited issue, with the belief that club committees are aging, potentially resulting in a future crisis. This is exacerbated with the increased compliance complexities.</p> <p>Specific concerns were raised about clubs' readiness to support casual participation, both in terms of general strategies and capability. Club committees are in general still very member focused (although there are clear exceptions).</p>	<p>Under these conditions managing significant changes including, implementing alternate membership models and casual participation will be challenging for many clubs.</p> <p>Consideration of the roles of Associations and Tennis NZ working directly with clubs is critical.</p> <p>People spend time learning, then burning out and then leaving – is a spiral that needs to be addressed for long term sustainability.</p>
<p>Capability toolkits would be of real benefit to Clubs and Associations</p> <p>Clubs (and to a lesser extent Associations) consistently requested toolkits to support club capability. This included:</p> <ul style="list-style-type: none"> • Policies and other governance collateral • Marketing, including support for the promotion of national programmes (Hot Shots etc.), social media support etc. • How to's on funding applications and guidelines for funding options (and direct support in some cases) • Software including several requests for information on ClubSpark. <p>In addition, ways to share good ideas and lessons across the tennis community – this was believed to be a role that Tennis NZ should fulfil.</p>	<p>Clearly significant benefit in providing toolkits and this activity should be prioritised.</p> <p>Consider the extent to which new things need to be developed and to what extent sharing of models and methods can be facilitated to achieve the same end. This would include case studies and systems to support collaboration.</p> <p>Learning from other sports, including Squash NZ that have successful models.</p>
<p>Culture, perception and marketing of tennis is not supporting growth</p> <p>The culture and some core beliefs of tennis may present obstacles in maximising participation. There was cited a culture in tennis of 'exclusivity' and that it was 'not aligned with wider NZ' sports – 'NZ culture is more on team sports'. Tennis clubs are often believed to be 'intimidating to new players'.</p> <p>Tennis is described as a 'a hard game to play' and there is a core belief that coaching is necessary to enjoy tennis and therefore believed to be hard for beginners. This is contrary to the perception that other sports are trying to portray themselves as easy and that anybody can play. The changes in the game including increased aggression and explosiveness, driven in part by equipment has exacerbated this issue.</p> <p>The cost of tennis is often cited as a barrier, despite the cost of membership being comparable to other sports, however this is likely linked to the need for coaching.</p> <p>The need to better promote tennis in general in New Zealand to try and improve the image and profile of tennis was considered a strong need, including national marketing of programmes (such as Tennis Hot Shots), generally encouraging casual participation and shifting the perception of tennis as a purely a summer sport. This is a core role Clubs and Associations are looking towards Tennis NZ for.</p>	<p>It is necessary to develop approaches to breakdown these barriers and perceptions. This may include new products that suit different player motivations – Cardio Tennis and Tennis Xpress both fit this model well and could be given greater exposure.</p> <p>Approaches to basic coaching should be reviewed.</p> <p>Growth from returning players is crucial and pushing this earlier will be significantly beneficial – again through product and coaching approaches.</p> <p>Consider how to better integrate community owned facilities into the tennis community.</p> <p>We need to think about the value model and image of tennis and determine what we want that to be.</p>

FINDINGS	IMPLICATIONS
<p>Post consultation, three regional structures have become evident:</p> <ul style="list-style-type: none"> • A Region that operates as a cohesive whole. – Auckland being the only example of this. Although Counties Tennis still operates as an Association so Auckland could actually be an example of the second model below. In this case the roles, responsibilities and relationships are clear. • A Region that contains multiple Associations, but primarily focuses on delivering within an old single (or perhaps two) Association boundary, with limited interaction (namely representation teams, perhaps some regional competition co-ordination and some communication) with the Associations in its regional boundaries. Central being an example where its focus is on Wellington metro (Wellington and Kapi-Mana), while the other Associations in the Central Region deliver locally. The other Regions structured in this way are Canterbury and Northern. The Associations within these Regions expressed the greatest degree of confusion and uncertainty as to the role of the Region and their relationship. This is possibly due to unclear expectations, and the variability of service delivery from the Regions to the Associations and ultimately the Clubs. • A Region that contains multiple Associations and delivers equally to all. In these cases the delivery is generally restricted to organising rep teams, with the Associations managing all other aspects of delivery with the Clubs (e.g. Interclub). The Regions that are structured in this way are Waikato-Bays and Southern. The responsibilities of the Associations and Region are generally pretty clear. 	<p>The different models have evolved to reflect both the reality of the diversity in NZ in terms of geography and population distribution, as well as the views and experience of people involved and decisions that different Boards have taken. The regional representative competition is believed to be valuable and responsibility for this needs to be considered in any structural change. The competition review is assumed to maintain some form of regional competition. Regions ability to influence a large geographic area in any meaningful way is clearly a challenge and organically or formally developed alternatives suggest the regional model is not fulfilling its objectives. However, determining whether it is the structure or the execution of the structure that is at fault needs to be considered.</p>
<p>There is a need for a strategic approach to facility management across the country</p> <p>A full range of facility issues were raised from the need for advice in facility management (e.g. lighting upgrades) to a national facility strategy that recognised changes in population, the benefits of indoor facilities etc. There were very few examples of Associations, Regions or Clubs taking a strategic view of facilities.</p> <p>The financial sustainability of facilities was a concern, most acutely with Association owned, larger facilities. This issue was coupled with the earlier cited finding related to Associations with facility responsibility and their relationship with clubs.</p> <p>Relationship with territorial local authorities (Councils etc.) was a challenge for many, with a belief that tennis is not historically positioned to deal with Councils and other external funders on facilities as it was largely member funded. Examples of this include struggling to meet the needs of Councils for multi-sport facilities, the number of people per court that tennis serves versus team sports and the belief that Councils value supporting recreation over sport</p> <p>There was a strong, but uncommon view that in general there are probably too many tennis clubs.</p>	<p>There is a risk that the facilities become unsustainable and are taken over by commercial entities resulting in increased cost to participants and a loss of connection with the tennis community.</p> <p>Any change in assets that are owned by independent entities (Clubs, Associations or Trusts) will need to be a highly collaborative and evidenced process.</p> <p>There is a need for an overall facility strategy and Regions/Associations need to play a role in this. There is a facility framework under development, which at this stage is focused more on the mix of court surfaces to support tennis development in general, rather than capacity and quality planning.</p> <p>Any facility strategy needs to consider the relationship with councils, including enabling access and multi-use.</p>

FINDINGS	IMPLICATIONS
<p>Membership and change to casual</p> <p>Dropping membership is clearly a concern (or at least an observation) for Clubs. In some cases, Clubs are actively trying to address this with casual, Business House (which has pockets of great success) or other participation options, in others it is just an observation.</p> <p>The comfort of membership revenue versus pay-for-play revenue is a struggle, even for those Clubs that recognise the need for change. In these cases, they are seeking support, advice and programmes.</p> <p>The decline in membership is consistently from teenagers through to 40 year olds, with people coming back in their 40s and 50s. This is partly backed by historical norms, however there is a belief that in the past families participated and therefore this decline was not as evident.</p>	<p>Development of alternate membership models that still enable a ‘subscription’ revenue model but create payment methods for participants. Review what membership means.</p> <p>Evidence from pay-for-play suggest that this can be effective for indoor facilities, but less so outdoors and therefore it is unlikely to fill the revenue gap. Cardio Tennis and Business House are potential opportunities for alternate membership models.</p> <p>Tennis NZ should be expected to play a significant role in supporting these changes, both in developing the models, running controlled trials and supporting associations and clubs in change implementation.</p>
<p>National programmes are very well regarded, and there could be more</p> <p>The quality of all national programmes is consistently perceived very positively. Tennis Hot Shots is known and well regarded by all, and Cardio Tennis, where promoted.</p> <p>Delivering of Hot Shots in schools is very effective and provides the Clubs (and Coaches) with a good calling card.</p> <p>Tennis Xpress is mentioned less often than the other programmes. This is interesting as requests for more national programmes is strong especially for teenagers, young adults and social tennis.</p> <p>Support for local marketing and promotion strategies and collateral for these national programmes was often requested.</p>	<p>The initial focus from Tennis NZ should be supporting the marketing and promotion of existing programmes, rather than focus on developing new programmes.</p>
<p>The role of coaches and their relationship with their clubs and their business is sometimes in conflict</p> <p>There is considerable variation in the quality of the relationship between Clubs and Coaches, and often a degree of resentment in this relationship, one way or the other.</p> <p>Clubs are inconsistent with their contracting terms for coaches and were often seeking advice and support on this. It was sometimes believed that the coaches were able to do what they wanted, and the club had little leverage over this. However, the value of the coaches was also clearly recognised in terms of maintaining (and in some cases, developing) membership.</p> <p>There were examples of apparent conflicts between the need for the club to develop revenue through for example casual and business house play, versus the need for the coach to have court time for paying clients to develop their business.</p> <p>In the best cases there were very positive relationships between clubs and coaches, with coaching taking a strong role in driving club membership, to the benefit of both the club and their own business.</p> <p>It was recognised by some that this relationship is further complicated as coaches are running a professional business within a volunteer driven club environment.</p> <p>There are some examples (and some very good) of volunteer coaching working very well. However, there are two clear schools of thought on the value and effectiveness of volunteer coaching.</p>	<p>A clear short-term opportunity for Tennis NZ to support clubs with contracting models for coaches to resolve clear, immediate issues.</p> <p>Longer term Tennis NZ’s role in leading coach development is currently under review including the role of the Tennis Coaches Association.</p> <p>A strategy for coaching that considers – quality, retention and availability of coaches (especially in provincial areas) is a mid-term opportunity.</p> <p>Review of the Tennis Australia model, including accreditation and affiliation of coaches and aspects of this approach that could be applied in NZ would be valuable.</p>

PREVIOUS ANALYSIS FOR CONSIDERATION

Roles and responsibilities; National vs Local (Regions and associations)

At the 2015 Chairs forum, regional representatives were asked to describe which tennis body (Tennis NZ or Region/Association) should own or deliver key responsibilities:

ADMIN/GOVERNANCE	
National: <ul style="list-style-type: none"> • Policy and advocacy • Remaining associations • Shared services 	Local: <ul style="list-style-type: none"> • Regional Sports Trusts • Shared services
PARTICIPATION	
National: <ul style="list-style-type: none"> • Tennis Hot Shots; Cardio Tennis, Tennis Xpress, Fast Fours • Programmes in schools • National tournaments and events • Casual market • Secondary/tertiary 	Local: <ul style="list-style-type: none"> • Interclub • Local tournaments/events • Casual market • Club support/development
COACHING	
National: <ul style="list-style-type: none"> • Engagement • Development • Registration 	

PERFORMANCE	
National: <ul style="list-style-type: none"> • National teams • ITF tournaments • Targeted player programme • National championships 	Local: <ul style="list-style-type: none"> • Next tier players • College/Uni pathway
COMMERCIAL	
National: <ul style="list-style-type: none"> • Sponsorship-national programmes • Marketing • Product development • Database/IT systems • Procurement • Contract services 	Local: <ul style="list-style-type: none"> • Sponsorship-local programmes • Trust funding
FACILITIES	
National: <ul style="list-style-type: none"> • National facility • Strategy/advocacy 	Local: <ul style="list-style-type: none"> • Development/management

2016 Tennis NZ AGM - Engagement and communication between Tennis NZ and the tennis community

Delegates workshop feedback to Tennis NZ

KEEP DOING	STOP DOING	START DOING
<ul style="list-style-type: none"> • CEOG and Chairs forums but increase frequency • New initiatives (e.g. Club Spark and sports science research) • Availability of Tennis NZ team • Operational linkages (e.g. webinars, heads up on important issues via newsletters, etc) • Listening to the tennis community • Face-to-face communication • Websites, advisory groups (e.g. coaching, Passing Shots, newsletters, performance updates) <div style="text-align: center; margin-top: 20px;">  <p>Importance of face-to-face communication</p> </div>	<ul style="list-style-type: none"> • Introducing new initiatives/events without providing regions a briefing, first by passing regions • Email overload - more consideration to who message is intended for <div style="text-align: center; margin-top: 20px;">  <p>Closer coordination with Regions on Tennis NZ activities</p> </div>	<ul style="list-style-type: none"> • More senior management and board visits to the regional centres • Working more collectively with regions • Involving regions in the process of strategy development • Tailoring communications to specific areas • Driving increased email sign-ups for newsletters • More timely and comprehensive meeting notes and minutes including financial strategy updates <div style="text-align: center; margin-top: 20px;">  <p>More face-to-face engagement and communication</p> </div>

PERSONAS

This section describes different personas representing the tennis participants. This work was completed as part of the Tennis in New Zealand Strategic Framework.

Tennis Player Needs: Social Club Player

Meet Jackie

Jackie plays social tennis every Sunday afternoon – she enjoys seeing friends and having a laugh, and a glass of wine at the end of play. Jackie likes to run around for fitness but doesn't take tennis too seriously. She's not interested in Interclub play or the blokes who poach her shots at the net! She sometimes has a lesson with the club coach to work on her technique and avoid tennis injuries.

What are Jackie's needs to have a great tennis experience?

- A club with a large member pool for social tennis
- **Welcoming atmosphere at the club (buddy system for new members)**
- **A social physical environment at the club (showers, bar facilities, catering)**
- Safe clubhouse (good lighting in car park, secure change rooms)
- **A variety of social play options available ("Doubles and Bubbles")**
- Scheduled programmes for novice / social players
- Club coaching available in different formats
- Social events in addition to tennis
- **Tennis oriented social holiday packages**



Opportunity to share best practice on welcoming environment / social facilities requirements

BLUE = Greatest unmet needs

Tennis Player Needs: Competitive Club Player

Meet Murray

Murray is stoked to have won the club champs doubles with his regular partner. He practices 2 nights a week and plays Interclub as well as joining in with social tennis during the winter. Murray moved to his current club 5 years ago for stronger tennis. He is on the committee and helps out with the BBQ some Friday nights when his kids come along to junior club night.

What are Murray's needs to have a great tennis experience?

- A club that attracts a high standard of players
- Access to courts for practice at peak times (after work)
- Good facilities with lights
- **Access to a range of interclub formats, flexible formats needed**
- Well organised club championships and prizegiving
- Club bar for social activities
- Range of junior and family events at the club
- Opportunity to contribute through the club committee
- **Committee guidance – templates and technology to help the volunteers**



Senior Competitive Player – has good skills and wants to play 2-3 times/week | Competition needed for players 50+ with fixed time slot certainty, all year round, incl. mixed

BLUE = Greatest unmet needs

Tennis Player Needs: Junior Club Player

Meet Aria

Aria is 9 years old and belongs to her local tennis club. Coaching is included for juniors in their membership and Aria has made some new friends while learning tennis. She likes hitting forehands and is keen to master serving and learning how to keep score. Aria's mum brings her to tennis and watches her lessons, but doesn't play herself. At school Aria is in the netball team and also likes to play soccer on the school oval at lunch time.

What are Aria's needs to have a great tennis experience?

- Friends to play with her (linkages with parents and schools)
- Local courts to play at – in good condition
- **A fun and engaging coach – not too serious**
- **A safe, welcoming environment**
- **A high quality coaching programme focused on skills development (depth of coaching includes high quality assistant coaches)**
- **Pathway to progress to a higher level of tennis**
- **Competition at the right level for her**
- Affordable / low cost tennis



BLUE = Greatest unmet needs

PINK = Working well

Tennis Player Needs: Busy Lifestyle Casual

Meet Amit

Amit is a busy accountant who loves tennis and plays regularly every Tuesday night with a core group of tennis friends at the local indoor centre. They often enter a team in the Business House competition. Amit played school tennis when he was younger but doesn't want to join a club. On the weekend he enjoys running and spending time with his young family.

What are Amit's needs to have a great tennis experience?

- A pool of similar (high) standard players to ensure regular games
- **Good facilities to play at – good lighting for night games**
- **Certainty on timing - fixed time slot options that he's prepared to pay for**
- Programmes to tap into (eg cardio tennis)
- Easy to access the courts (parking, access codes)
- **Smartphone technology to easily book a game with partners**
- **Technology connected to his social media (eg Facebook, Instagram)**
- **Customised Products (Business House, Fast 4, Active Tennis)**
- Social facilities (showers, bar)



Opportunity for better collaboration between venues and clubs to meet casual players' needs

BLUE = Greatest unmet needs

PINK = Working well

Tennis Player Needs: Family Casual Players

The McInnes Family

Sarah McInnes plays in the local park with her husband Dave and their kids Holly and Angus. The local court is free and in good condition, but is sometimes busy when they show up. The McInnes family can't afford \$800 a year to join a club, but Sarah and Dave would like the children to learn to be proficient at tennis for life.

What are the family's needs to have a great tennis experience?

- Knowledge about where to play locally
- Community facilities nearby for an 'outing' – playground, BBQ facilities
- **Ability to book the courts to give certainty of access and timing**
- **Child friendly tennis facility – smaller court or flexibility to be converted**
- Information on challenges / games to play / how to use equipment
- Equipment available for use
- Information about further tennis options – on a notice board or online
- Flexibility in playing commitment
- **Free facilities in safe environments**
- **Flexibility in payment options - lump sum unaffordable**



This player segment seen as completely unserved by the tennis organisations of NZ today

BLUE = Greatest unmet needs

PINK = Working well

Tennis Player Needs: High Performance Player

Meet Ella

Since winning the girls 14yrs National Champs Ella dreams of playing at Junior Wimbledon. She gets up at 6am to do her fitness programme before school, and trains with her coach after school 3 days per week. Weekends are either spent travelling to tournaments or playing top Interclub with adults. Ella doesn't often go to parties with her friends because she is committed to her goal of becoming a professional tennis player.

What are Ella's needs to have a great tennis experience?

- **Access to a high volume of high level coaching**
- **Access to courts year round – indoors courts and hard courts**
- **Access to practise partners of similar ability**
- **Funding for coaching and travel needs**
- **Life balance – school / academic support**
- **Guidance and parental support**
- Physical development – strength and conditioning
- Clear pathway to success
- **High level international competition (overseas travel) – reality check**
- **Funding for a breakthrough into professional ranks – if potential is shown**

BLUE = Greatest unmet needs

PINK = Working well



Tennis Player Needs: Teenage Casual

Meet Joshua, 16

Joshua started playing tennis when he was 9. He took group coaching and one private lesson per week all year round and also played junior interclub over the summer. At 14, Joshua decided to stop tennis. It was a difficult decision but he was struggling to balance school work and his social life as well as wanting to try a few different sports like mountain biking and sailing. Now 16, he also has a part-time job to fit in as well. Joshua loves having a hit of tennis on holiday with his family, and sometimes his friends are keen for a mess-around at the weekends but he would like to be able to play more regularly as he's really frustrated that he's not as good as he was a few years ago!

What are the Joshua's needs to have a great tennis experience?

- **A positive and interactive social environment with others of a similar age and ability that offers fitness, stress-relief and skill development but no pressure to perform or compete**
- **Flexibility in scheduling and plenty of opportunity to play without having to make a long-term commitment**
- **Opportunities to try different ways of playing ('touch tennis' style on Hot Shots red courts)**
- Wifi/free internet access at the club
- **Relatable coaches and deliverers who are empathetic, confident, good communicators, fun and engaging**
- **Training and opportunity to assist the coach with the under 12's Hot Shots groups for some pocket money income**
- **Alternative membership or pay to play options that don't aren't the traditional membership and interclub team package**



Alternative, engaging products to minimise the risk that Joshua might be lost to tennis until he is 40+

BLUE = Greatest unmet needs

PINK = Working well

Tennis Player Needs: Senior Social

Meet Karen

Karen has been playing tennis forever. Her mum and dad taught her when she was young, and she taught her kids who are grown up now and play occasionally (as does her husband). Karen plays most of the year (doubles only), three times a week on Wednesday mornings at 'midweek ladies', on Thursday evenings at 'senior social' and again on Sunday mornings with a close group of her friends followed by coffee and brunch at the local café. She sometimes helps at the club with shared lunches or open days if they ask, but really just wants to play. Karen loves following the professional game and always visits Auckland for the ASB Classic every summer.

What are Karen's needs to have a great tennis experience?

- Easy access to courts throughout the year anytime of the day and week
- **Play against people of very similar level**
- A sense of belonging to the club
- **Opportunity to bring family and friends to the club as visitors a few times throughout the year**
- A reliable network of people that are available for extra play outside of what the club coordinates
- **Well kept courts and a nice club house with clean and modern changing facilities**
- Priority access to ASB Classic tickets and special events
- **Year-round play with floodlights for winter**
- **Well-organised social play sessions at the club**

Floodlighting and year-round play are opportunities for lots of venues across NZ

BLUE = Greatest unmet needs

PINK = Working well



Tennis Player Needs: Differently abled

Meet Matthew

Matthew has been a wheelchair user since he was 17. Prior to this he was an active participant in a variety of sports, including tennis. He would like to play tennis again more regularly and is looking for facilities with easy to access hard-surface courts within an hour drive of his home. Every few months, Matthew hits with an able-bodied close friend, but Matthew would also like to have a more competitive game by linking in with a network of other wheelchair users and some guidance from a specialist coach. Matthew is interested in social and competitive play and wants to feel welcome off the court and challenged on the court.

What are Matthew's needs to have a great tennis experience?

- **Accessible on- and off-court environment (hard-courts) close to home**
- **Clubs/venues that integrate able-bodied and wheelchair players**
- **Access to a coach or experienced players who can provide instruction and guidance when needed**
- **A strong network of others to hit with**
- Organised events and competitions for wheelchair tennis players
- A welcoming club/venue atmosphere where others are happy to play with/against him



This player segment has limited supported from tennis organisations in NZ today

BLUE = Greatest unmet needs

SPORT IN NEW ZEALAND VIEW

The purpose of this section is to describe relevant societal, economic, demographic and sport specific trends that may be impacting or may impact sport in New Zealand.

The insights have come from the following primary sources:

- “Future of Sport in New Zealand”, Synergia for Sport New Zealand, April 2015.
- “The Market Segmentation Study”, Australian Sports Commission, April 2017.
- “Volunteering Insights Report”, Gemba for Sport New Zealand, November 2015.
- “AusPlay - Summary of key national findings October 2015 to September 2016 data”, 21 December 2016
- “The Future of Australian Sport”, CSIRO for the Australian Sports Commission, April 2013.
- “Plan, Prepare, Perform”, presentation by Wayne Goldsmith – Moregold Performance Consulting, Queensland Sport and Recreation Conference, 2017.
- “Increasing participation in sport and active recreation – implementation framework”, Innovate Change, June 2016.
- “Sport and Active Recreation in the Lives of Auckland Adults – 2013/14”, Sport New Zealand, 2016.
- “Sport and Recreation in New Zealand Pasifika Communities”, Victoria University of Wellington, November 2010.

Population, economy and employment trends

Urbanisation is increasing in New Zealand

86% of the population live in urban environments.

Population growth is predicted to slow/end in most rural areas. Auckland accounted for 52% of all population growth between 2006 and 2013.

Urban centres are more ethnically diverse (particularly for new migrants), and rural areas tend to have older populations.

We have an ageing population

Between 2013 and 2031, the population is projected to continue to age, with proportionately more people over 65, and proportionately fewer under 50.

Between 2006 and 2013, there has been very little change in the under 50 age groups, but the number of people aged over 50-64 has increased by 19% and those aged 65-74 has increased by 30%.

By 2021, the majority of territorial authorities will see a decline in the number of 13 to 18-year-olds.

New Zealanders are living longer than ever before and spending more of that time in good health.

Ethnic population mix is changing

Highest actual growth (numbers) has been in European/Other.

Population growth for Asian, Maori and Pacific Island ethnicities is growing at the highest rate:

- Asian population is projected to grow by 190,000 by 2021 (135,000 of which will be in Auckland).
- Maori population increased by 6% from 2006-2013 and has a younger age structure; it is projected to grow nationally by 90,000 by 2021.
- Auckland’s Pacific population is projected to grow by almost 60,000 by 2021, and a further 30,000 in the rest of New Zealand.
- Migrant growth is across New Zealand and diverse (data from 2013-14):
- 13 out of 16 regions had a net gain of international migrants, led by Auckland (17,800), Canterbury (5,600), Otago (1,100)
- Migrants came from: India (7,000), China (6,300), the United Kingdom (5,500), the Philippines (3,000), Germany (2,200) and France (1,900).

Economy and employment

New entrants to the labour market are struggling – the number of unemployed in the 15-24 age group has grown.

In contrast, the number aged over 65 in employment increased significantly between 2006 and 2013.

Auckland and other major cities will see more growth in employment and productivity.

Youth unemployment is likely to fall as the number of people retiring increases.

The outlook for the New Zealand economy is relatively positive with relatively high GDP growth over recent times and given the volatile economic conditions being experienced across the globe.

The New Zealand economy is seen to be too reliant on low value, low productivity areas and doesn't leverage its collective resources or people, environment and knowledge to full effect (New Zealand Productivity Commission 2014, Oram 2014).

There is a significant gap between the richest and poorest households; however, the gap has not grown in recent times when comparing the share of income received by the top decile (10%) of households with that received by the bottom decile. In 2012 this ratio was 8.2 increasing slightly to 8.3 in 2013.

Sport trends and external analysis

Structure

The sports that will grow will adopt an attitude of “we” and “us”, committed to open, honest, transparent, ethical, standards and to the paradigms of integration, co-operation, communication, collaboration and partnerships. The old days of secrecy in sport are gone. Need to ensure a supportive relationship between elite and community participation
Need to forge alliances across sectors:

- partnerships will be important, including the private sector, academia, philanthropy and community sectors, along with central government;
- there must be value on both sides. A partnership with the education sector, for example, recognises the contribution physical activity can make to supporting academic achievement. The links with the health sector should be based in part on the contribution sports participation can make to reducing obesity and chronic disease; and on the flip side, a healthy population will enable more people to be active and participate in sport.

Participation

Data

Participation sometimes varies with people's socio-economic position (high deprivation participation is lower) and where they live (rural participation is lower than urban).

For adults, participation grew by just over 1% from 72.6% in 2007/08 to 74.0% in 2013/14.

Groups with the most notable increases were the mid-age group (35 to 49-year-olds), Pacific peoples, and those in a mid-income group.

Young adults' (16-24) sports participation declined over the same period from 79% in 2007/08 to 76.7% in 2013/14.

There were also declines among Maori and those in the lowest income group.

- Physical activity trends have varied since 2006/07
- Physical activity levels have declined for younger adults (those aged 15-24 years), from 56% to 51%.
- Percentage of physically active adults aged 75 years and older increased from 34% to 42%.
- Asian and Pacific adults were less likely to be physically active (20% and 10% less respectively),

Young people activity specifically is declining:

- Asian young people are less engaged in most aspects of sport and recreation than young people overall.
- Young people in urban areas are less likely to be active.
- However, a recent international study of 15 countries puts New Zealand first equal for the percentage of children and youth who meet their country's physical activity guidelines

In 2001, almost one-half of secondary school teachers (45%) were involved in secondary school sport; by 2013 this had fallen to one-third (33%).

In Australia (with the exception of outdoor soccer), non-team (individual) physical activities, such as walking and running, have grown since 2001 compared with team sports.

Increasing interest in sports participation in China with significant development of participation and performance programmes in recent years – this may have an impact on new immigrants.

Sports participation in India is very low, estimated at 1 per cent of the total population in 2010. It is possible that as India becomes wealthier and upgrades its sporting capabilities this might change in coming decades

Attitudes to activity

The vast majority of parents agree that physical activity is good for their child, and even suggesting that having inactive children may reflect negatively on them as parents which can be a significant driver

Women are more likely to be focused on the physical, mental health benefits and maybe to lose weight, and for men, it is more about fun and enjoyment and the social reasons. 80 per cent of survey respondents said they were motivated by the physical benefits of activities, compared to about 45 per cent who also cited fun or enjoyment. Competitive benefits were less important.

Parents and children identify a greater potential range and number of benefits in relation to club sport compared to other avenues for sport participation.

Clubs trends

Sports club membership has declined in New Zealand from 19.0% in 2007/08 down to 16.9% in 2013/14 (of activity participation).

A lack of flexibility around the scheduling of sport in traditional sporting clubs reduces participation.

Limited opportunities for people with limited sports competency to join sporting clubs.

An opportunity for the sport sector to increase interest and involvement in clubs through exposure in schools

Many amateur sporting clubs around the world are expected to collapse and fold within the next twenty years leaving many sports with a network of larger more professional and semi-professional clubs to work with - i.e. "Super Clubs".

In the US, an emerging new development is for-profit 'sport and social clubs', catering to people in their 20s and 30s, and commonly featuring co-ed teams, playground sports and social components such as sponsor-backed bar gatherings and end-of-season parties.

Although hubbing of sports facilities has its advantages, a key challenge is the loss of local clubs and facilities.

Future trends and recommendations

Community sports associations are likely to be replaced by organisations with corporate structures and more formal governance systems in light of market pressures.

Sports organisations will provide a variety of pricing packages and different types of membership that allow for flexibility of attendance and time commitment, with people-centric models that respond to individual preferences, rather than demand compliance to a

facility/ organisational-led model.

The future is likely to see an increased focus on the broader benefits of sport:

- Significant data that demonstrates the relationship between general health and activity levels.
- Controlled studies into the benefits of sport and exercise in the clinical treatment of mental disorders show that sport/exercise group experiences produce better outcomes than the control group.
- Australian Institute of Criminology (AIC) states that "with careful planning, sport and physical activity have crime prevention potential".
- Sport offers the potential for connection, meeting a core social need of people, in a way that a medical fix is unable to satisfy.
- Many fitness centres have established themselves as complete health and wellbeing centres, beyond the traditional core of gym equipment and classes.
- Sport is being used as a means of building social capital in marginalised communities.
- Worldwide, governments are using sport to improve international relations and promote peace and prosperity.

Competitions will change to be more relevant to participants needs:

- Shorter.
- Focused on fun and enjoyment, not just competition.
- Relevant and meaningful for all participants – not just high performers.
- Inclusive of families and their needs, their schedules, their time limitations.

Development of 'personal clouds', which will assemble personal health, lifestyle and consumer information, in ways that individuals will themselves control. Future options include:

- personalised coaching
- immediate feedback on individual technique
- personalised skills and fitness development
- identifying patterns of play in team sport

Coaching is changing to be being about collaborating, partnering and building sustainable, dynamic sporting environments with coaches, athletes and parents / partners and working together as a team to achieve peak performance potential.

Active electronic gaming is a growing alternative to organised physical activity that may grow in popularity and encourage new participants in unorganised physical activity.

Ethnic perspective

Asian young people are less engaged in most aspects of sport and recreation than young people overall.

Fitness and health, enjoyment and social Reasons are the top reasons given for participation in sport, regardless of ethnicity. However, the next three reasons vary by ethnicity:

NZ European	Maori	Pacific	Asian
Low cost	Low cost	Sport performance	Low cost
Convenience	Cultural reasons	Cultural reasons	Convenience
Sport performance	Sport performance	Low cost	Cultural reasons

Maori and Pacific people are more likely to engage in activity through organised participation, such as clubs than New Zealand Europeans. Conversely, Asian people are less likely to engage in activity through formal participation structures.

Gender roles and family responsibilities can be a barrier for Indian and Samoan women, while doing sport as a family, or for family, is important in Samoan and Indian communities.

The Indian population in Auckland is diverse, in terms of ethnicity, birthplace, religion, language and employment.

In a study of the Pasifika community, a major influence, mentioned by many, was the need to feel “culturally safe or comfortable”. This included having visible Pasifika involvement in the programmes, and in particular Pasifika leadership. Family and community were seen to have a strong role to play in either motivating or discouraging participation. The roles of the fathers were described as powerful and having the potential to be both positive and negative. Spirituality and/or church were described as important central influences, acting as both a motivator and a disincentive.

Volunteering research

Volunteering among adults grew by almost three percentage points from 24.9% to 27.7% in 2006 - 2013/14.

The recruitment of volunteers at an early age is critical. Volunteers begin their service at an early age (16-24 years old) and are likely to serve for a significant period of time.

Sport volunteers are also participants of their respective sports. On average, 54% of sports volunteers have participated in that sport in the last 12 months.

The motivations of volunteers are selfless. They serve for the enjoyment achieved from giving back to their community and/or sport, and care little about the rewards they receive in return.

The top incentives to encourage future volunteering are more training and development, and better support from the club.

The older the volunteer, or the higher the household income, the more frequently they will volunteer.

Coaches work with both genders; however, coaches are more likely to coach those of the same gender.

Spectators and fans

Viewing options of a plethora of sports, enabling individuals to choose the time at which sport can be viewed, and the length of time that sport can be consumed. Now short form content is the norm not the exception.

Sports are taking control of their own broadcasting through direct broadcasting online and development of apps for live broadcast and fan interaction.

Competitors and spectators in non-traditional sports may be less concerned with winning than with other qualities of the athlete such as stamina, skill, concentration, focus and flair. These changing notions of winning may have implications for future competitions and how sport is perceived generally. Perhaps future public support may be garnered from more than simply winning.

Development of fantasy leagues changes the focus from teams to individuals and provides and reaches a different fanbase.

INTERNATIONAL TENNIS FEDERATIONS VIEW

	Portugal	Norway	Ireland	France	Australia	LTA (England)	Canada
Governance Layers	13 geographical Associations	8 geographical regions	4 geographical regions	National centre	8 States (some with multiple associations)	LTA	10 Provinces
	3 Affiliates (Officials, Players, Coaches)	Approx 145 clubs	180+ tennis clubs	Region	Association (geographical)	Counties	Club
	300+ tennis clubs		1 national tennis centre	Department	Club	Clubs	
				8000+ Clubs		3 armed forces affiliate to LTA	
Who does what	FPT regulate tennis, padel, wheelchair, beach, national champs,	Federation lead club activity and competence development, club resource library, coach development, Padel recognised by Federation	TI manage club development, coached, child protection, rankings, national centre, Davis/Fed Cup, rules and comps, tournament software	HP programmes in each department and region (progressive in quality/selection).	Associations administer competitions, run tournaments that are linked in with TA framework, facility maintenance and funding, manage council/sport and rec relationships	LTA write the strategy, deliver it, employ all head office and field team staff	Prior to approx 2008 each province did their own thing. Now Tennis Canada collaborates nationwide.

	Portugal	Norway	Ireland	France	Australia	LTA (England)	Canada
Who does what				FFT delivers coach education (lower qual levels delegated to the regions).	Clubs run competitions, promote and organise teams for association competitions, membership, venue sustainability, manage coaching contracts, provide tennis services for members and non-members, fundraising	County Associations made up of volunteers who affiliate to LTA and provide a councillor per county to vote on matters.	TC lead coach development and lower levels of quals are delegated to the provinces.
					Tennis Australia – school delivery systems, link with education, national programmes, coach membership and ed, tournaments, distribution of funding to MA/states (based on KPI’s), membership, affiliated clubs – the bigger you are the more you get), sponsorship, marketing tournaments and tennis programmes, research templates and system build to be used by the member states and in turn the clubs.	County Associations are constitutionally separate and can make independent decisions. County remit is to support smaller venues that the LTA can't cover and administer local leagues and competitions.	Performance is managed by each province for U15 with the best then selected to join the national centre.
					Coaches – deliver TA programmes, urban coaches run tennis business as a centre manager for the whole club. Centre manager, head coach, full time senior coach. Non-voting member of the club committee sometimes. Attend committee meetings. Providing tennis to members and non-members. Some in-house professional development.	Responsibility of the county associations has diminished in past 20 years due to LTA increasing staffing strategies and centralisation.	
Leadership and guidance		Federation lead in key areas such as child protection, doping, police vetting, match fixing		Government mandates coach certification.	Mainly top down, good alignment up to Tennis Australia strategy, independent initiatives from member states don't tend to get much traction/longevity, centralised processes managed by TA, with member states promoting the initiatives	LTA remit is to enable and educate people to improve what they do for themselves.	TC lead, but let the provinces follow as they want, it is requested they follow guidelines

	Portugal	Norway	Ireland	France	Australia	LTA (England)	Canada
Leadership and guidance		Lead with facility dev support, volunteer and coach training, tournaments, national teams,		FFT lead everything with great alignment into the national body.		Any initiatives are largely led from NTC. County Associations can choose to do some local things but have to raise own sponsorship money.	There is great alignment up into the national body/strategies/direction.
Geography		Geographical spread. 1 region with 8 clubs, 2 with 9 clubs, 1 with 10 clubs, 1 with 14 clubs, 1 with 17 clubs, 1 with 20 clubs, 1 with 58 clubs		Very well organised for rural area because the Departments are the local authority for everything (sport, politics, welfare etc)	Coach Dev staff in each state are employed and paid by Tennis Australia. All other staff report directly to the state. This does cause frustration/tension for the member states due to lack of control in that department.	LTA has remit to service everyone. 5 regions with 4 regional managers and staff levels depending on population.	Very challenging for rural areas which suffer from isolation.
Relationships		Regions can support clubs with the Federations initiatives			The Participation Leaders and Coach Dev teams are responsible for being out and about. Locations are divvied up between staff. Tier 1 clubs are proactively serviced, Tier 2 clubs are reactively serviced. More regional states are on the road a lot depending on the size of the state. Geography is a challenge, clubs and associations can feel neglected. Travel subsidies and technology is used a lot to embrace those further away.	Although it could be better – we connect in a simple way. Regional Manager has monthly heads of region meeting with senior leaders. Senior leaders (7) in LTA (CEO etc) meet on a weekly basis. We have a SW meeting every month. I would speak to my colleagues in participation in SW on the phone to chat every other day about projects and ideas we have.	

	Portugal	Norway	Ireland	France	Australia	LTA (England)	Canada
Money		Clubs join the Norwegian Tennis Association and pay a membership fee in return for a long list of benefits		Money goes both ways. FFT get money mainly from Roland Garros and from membership (of clubs and players). Then they give money to the region, department and clubs.	TA send funding down, and states have to reach KPI's set by TA in order to receive the funding.	Each regional team holds a budget and the regional manager pitches for what extra resources are needed. All initiatives like GBTW or TFK are funded and managed centrally.	Money goes both ways. Most money comes from Rogers Cup. The provinces get money from membership (clubs and players) and then redistribute it to the provinces.
Collaboration/ Comms	Very outdated website			<p>The presidents of each department are on the board of the regional League. Each president of the regions is on the FFT board.</p> <p>Like a communist country with Federation Board deciding most of everything and behaving quite arrogantly with regions and clubs</p> <p>Clubs will connect with department and sometimes with the region, but never with the FFT</p>	<p>Member states are 'nudging' TA for reality checks of how things are working on the ground, making sure things are kept relevant. States emphasise importance of being taken on the journey. IF TA push things through it doesn't get as much traction.</p> <p>State departments are in regular contact with their counterparts from TA, CEO's have regular catch ups with the relevant staff in TA, Annual get-togethers etc, monthly phone calls</p> <p>Comprehensive website offering a variety of support for clubs, coaches and competitions, schools and governance</p>	<p>Some counties resist or disagree with what LTA does. But now they have less responsibility and influence, there isn't so much friction anymore. Largely counties are happy for LTA staff to do what they do, and counties do what they do.</p> <p>LTA communication is effective, either face to face visits, emails, invites to forums etc. So, if you are a 1 court club in the middle of nowhere there is still a touch point. The exception is where county association have good and locally well-known volunteers</p> <p>Regional managers have different priorities - we could improve the consistency of our central strategy e.g. some regions do more work with parks and schools than other who do more with clubs.</p>	Each president of the 10 provinces are part of the Tennis Canada board. The small provinces have been united together to represent as one geographical province. More collaborative with TC providing direction, but provinces independent to make decisions on how they get there

	Portugal	Norway	Ireland	France	Australia	LTA (England)	Canada
Scale/Level of professionalism		Comprehensive website, solid club and coach support, multiple regions working with a manageable number of clubs				All departments have at least 1 full time technical employee and 1 administrative employee. The regions have the same.	Each province has a full time technical/ administrative person with the big provinces having coach ed staff, CEO, tournament and events staff etc.



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