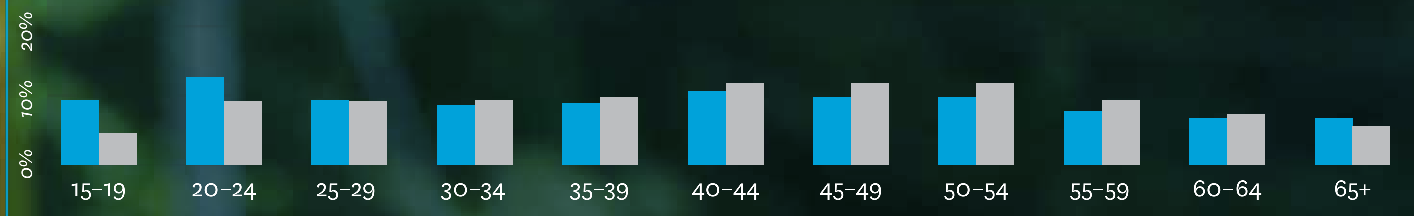
Sport and Community Recreation

Sport and community recreation brings New Zealanders together, and helps to promote an active and healthy population, individual wellbeing and resilience, and cohesive communities. Sport and community recreation professionals are required to develop a range of transferable skills including self-management, planning, leadership, goal-setting, perseverance and teamwork.

Industry snapshot

Sport and community recreation in New Zealand promotes an active and healthy population, individual wellbeing and resilience, and cohesive communities

AGE



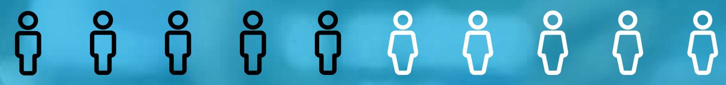
Sport and Recreation | Total Economy

EMPLOYMENT BY GENDER

Sport and Recreation

Male 54% | *Female 46%*

Total Economy



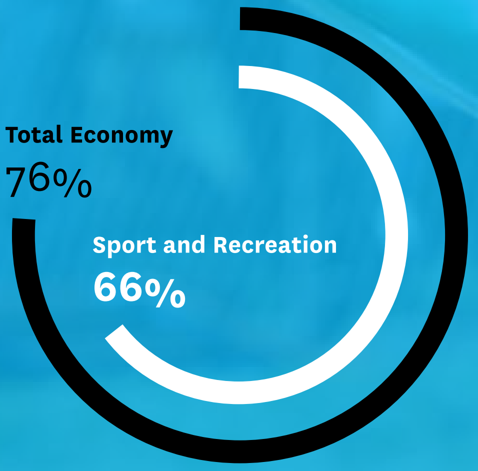
Male 53% | *Female 47%*

ECONOMIC CONTRIBUTION

$2.343B GDP

1.0% of New Zealand's GDP in 2016

PERCENTAGE WORKING FULL-TIME - 2013



Total Economy
76%

Sport and Recreation
66%

Percent working 40 hours or more per week

FILLED JOBS IN INDUSTRY

2006
29,466

2016
34,394
1.5% of all jobs

Industry profile

The sport and community recreation industry encompasses non-profit, private and government organisations, from grassroots through to national bodies. The work of these organisations can be grouped into three streams: facilities such as swimming pools, parks and open spaces; the management and delivery of sport and recreation programmes and/or events; and coaching/officiating of teams and individual athletes.

There were 10,931 business units in the sport and community recreation industry in 2016, up from 10,481 five years earlier, an average increase of 0.8% per annum. Business unit growth over this period was lower than in the total economy (1.5% per annum).

TWO MAJOR INDUSTRY GROUPS

LOCAL AUTHORITIES (PRIMARILY COUNCILS)

Councils employ a significant proportion of the industry, spending some $800 million annually on delivering sport and community recreation, and maintaining an estimated $7 billion worth of assets.[41] Integral to local government delivery of sport and recreation are the various council-controlled organisations and commercial businesses working out of council-owned facilities.

SPORT AND RECREATION PROVIDERS

More than 200 national and regional sport and recreation organisations, 14 regional sports trusts, and some 15,000 clubs deliver sport and recreation and services, along with non-incorporated societies and non-profit trusts, out-of-school caregivers, Pasifika church and community groups, iwi and hapū, and health services. Some providers are commercial businesses, including Kelly Sports, Belgravia and Community Leisure Management.

Integral to local government delivery of sport and community recreation are the various council-controlled organisations and commercial businesses working out of council-owned facilities

[41] *Economic and Social Value of Sport and Recreation* - Sport NZ, 2014

Workforce profile

TOP FIVE JOBS BY VOLUME

OTHER SPORTS COACH OR INSTRUCTOR	GREENKEEPER	SWIMMING COACH OR INSTRUCTOR	LIFEGUARD	SPORTS ADMINISTRATOR
4,336	3,322	2,635	1,776	1,583

Paid employment in the sport and community recreation industry reached 34,394 in 2016, compared to 23,811 in 2000. Employment in the sport and community recreation industry is forecast to grow to 41,062 by 2021.

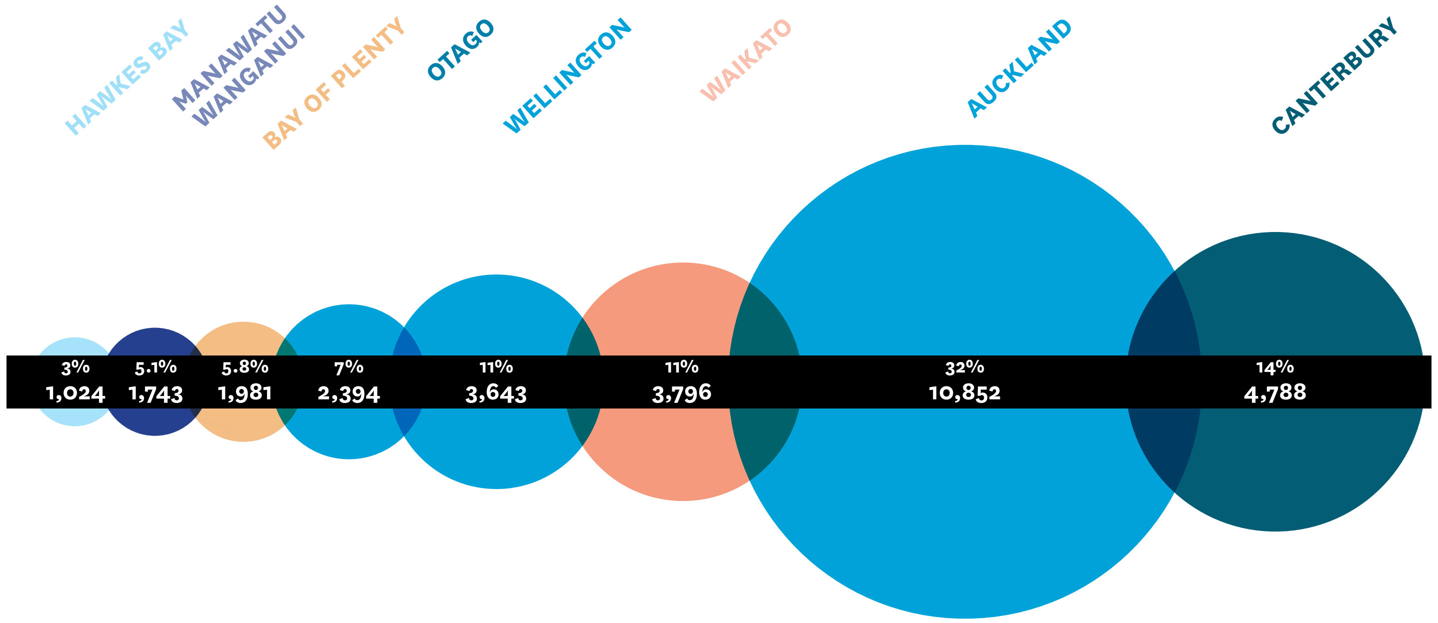
Between 2011 and 2016 employment in the sport and community recreation industry grew by an average of 1.4% per annum, compared with total employment growth of 1.9% per annum.

However, in the two years to 2016, employment growth in the sport and community recreation industry was higher than the total economy (3.2% per annum compared to 2.7% per annum in the total economy).

According to the Skills Active Workplace Survey, coaches, swim instructors and lifeguards were among the most difficult roles to recruit for the industry in 2017.

REGIONAL EMPLOYMENT

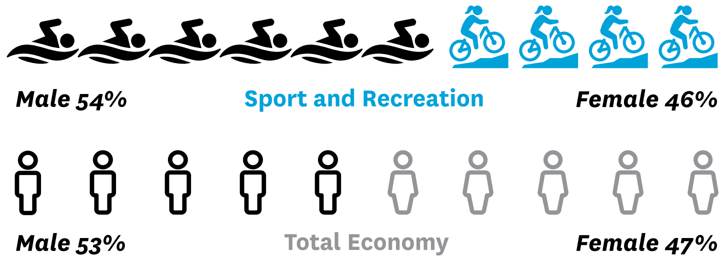
Of the 34,394 people employed in the industry in 2016, the majority were employed in the Auckland region.



Workforce makeup

GENDER

There were fewer female than male workers in the sport and community recreation industry in 2016. Females accounted for 46.5% of employment in the industry. The proportion of female workers increased from 41.3% to 46.5% between 2001 and 2016. Over the same period, the proportion of females in the total economy increased from 45.5% to 47.2%.



TYPE OF EMPLOYMENT

Of the 34,394 people employed in the sport and community recreation industry, 66% worked full-time hours in 2016. The number of full-time equivalent (FTE) employment numbers in the industry reached a new high at 29,006 in 2016.[42] The number of FTEs in the industry grew by 1.8% per annum over the five years to 2016.

In addition to the paid workforce, the industry is supported by over one million volunteers – a number which has only been increasing over the years.[43] Many volunteers help out with events and coaching.[44] However, the turnover of volunteers is high. This often reflects the fact that many adult volunteers are supporting sport and community recreation activities for their children, and they typically do not volunteer beyond their children's involvement.

In 2016, 16% of the industry was self-employed. Despite the fact that the industry's self-employment rate has increased over the past five years, this number is still lower than the total economy's self-employment rate of 18%.

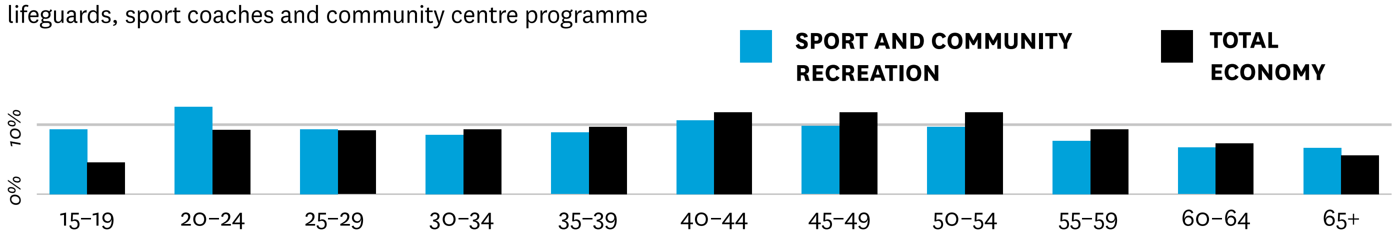
AGE

The industry has a young workforce, with 24% of employees aged 15–24 years old. This is 10% higher than the average national labour force in that age bracket.

With a young workforce, it is no surprise that 42% of respondents to the Skills Active Workplace Survey reported that they were actively working with schools to recruit staff.[45]

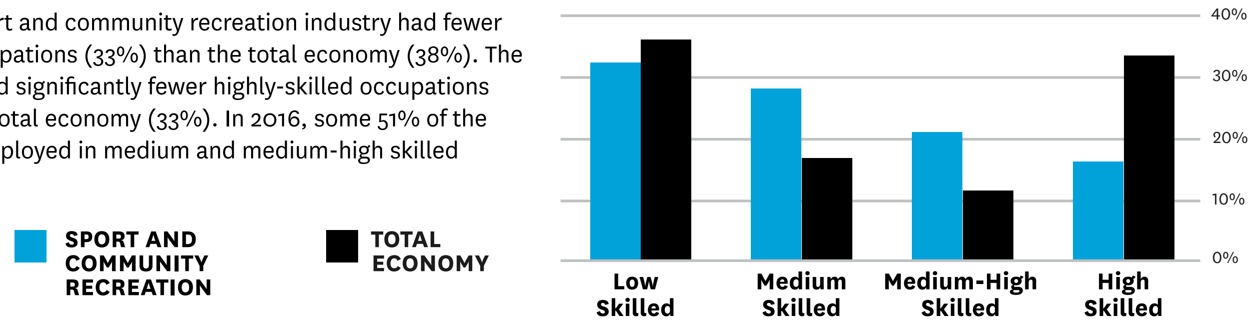
These figures may reflect the fact that roles such as pool lifeguards, sport coaches and community centre programme providers are often filled by young people who are still associated with the schools and youth groups to whom they are delivering services.

The number of people aged 65 years and over in the workforce increased from 4.6% in 2006 to 6.7% in 2013, similar to the total workforce, where this age bracket jumped from 3.3% to 5.8% over the same period.



SKILL LEVEL[46]

In 2016, the sport and community recreation industry had fewer low-skilled occupations (33%) than the total economy (38%). The industry also had significantly fewer highly-skilled occupations (17%) than the total economy (33%). In 2016, some 51% of the industry was employed in medium and medium-high skilled occupations.



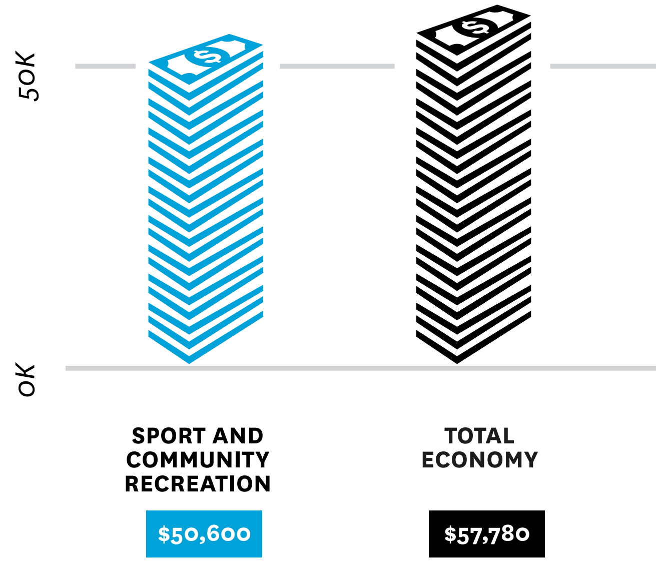
[42]Full-time equivalent (FTE) employment is a way of looking at employment that takes into account the workload of people into employment. FTE employment measures the number of people in employment for 40 hours or more per week. Two people who are employed part-time are measured as one FTE. Using FTEs instead of employment to look at change over time can provide a more consistent comparison of labour resources used in employment.
[43]Active NZ Survey, Sport NZ, 2013/14 [44]Workplace Survey, Skills Active, 2017 [45]Skills Active Workplace Survey, 2017 [46] Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.

EARNINGS

The average annual earnings in the sport and community recreation industry were $50,600 in 2016 – lower than the average annual earnings in the total economy of $57,780. Industry earnings have grown at a slower rate than the total economy over the past 10 years.

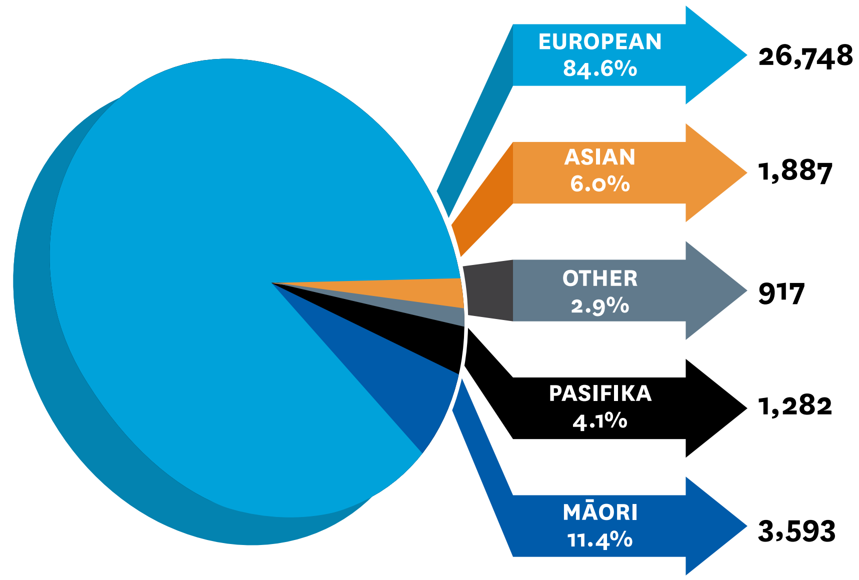
The salary extremes of high-performance coaches, professional athletes, planners and policymakers somewhat skew the earnings figures for the industry as a whole. The reality is that many sport and community recreation professionals work for small organisations that depend on public funding and philanthropic donations, and many work fewer than 30 hours a week.

According to Sport New Zealand's 2017 Paid Workforce Survey, the highest-earning employees in the industry are those employed by government agencies/crown entities and National Sports Organisations. Those employed in roles relating to high-performance coaching, high-performance programmes/campaigns and leadership and management also receive incomes well above industry averages. However, it is noted that people in these roles also typically work more hours per week.



ETHNICITY

In 2013, the majority (84.6%) of those working in this industry identified as NZ European/Pakeha. This percentage is higher than the 77.2% of people who identified as NZ European/Pakeha in the total economy. Those who identify as Māori made up 11.4% of the industry (compared to 11.1% of the total economy); Pasifika people 4.1% (compared to 4.9% of the total economy); and Asian people made up 6% of the industry (compared to 11% of the total economy). More effort needs to be placed in promoting viable career pathways and employment opportunities for these groups in the sport and community recreation industry.



Impact

The sport and community recreation industry contributed $2.343 billion to New Zealand's gross domestic product (GDP) in 2016. This equates to 1% of total GDP. In the five years to 2016, GDP in the sport and community recreation industry increased by 1.2% per annum.

New Zealand is an active nation, with people of all ages participating in sport and community recreation activities. The most popular activities of choice are walking, swimming, cycling and jogging, and these are often done recreationally. New Zealanders take part in a diverse range of sports, with the most popular being golf, football, tennis, netball, cricket, and rugby.[47]

Local sport clubs and recreation groups provide a range of social benefits for New Zealanders, providing a setting for social interaction, building skills, and fostering a sense of community and belonging.

Sport is a key driver of international and domestic tourism, with New Zealand playing host to the hugely successful Lions Tour and World Masters Games in 2017 and, before that, the 2015 Cricket World Cup, 2011 Rugby World Cup, and other international tournaments. Sport-based tourism is strongly linked with solid visitor spending on accommodation and attractions beyond the main event.[48, 49]

Economic Contribution

$2.343B GDP

1.0% of New Zealand's GDP in 2016

The World Masters Games brought in $63 million to New Zealand's economy in 2017

[47]*Active New Zealand Survey, Sport New Zealand, 2015* [48]*Lions Tour games boost economy significantly, NZ Herald, July 2017*
[49]*Press release: World Masters Games brings in $63 million, Jonathan Coleman and Simon Bridges, August 2017*

Trends/Issues/Risks

POLITICAL

Outsourcing of sport and community recreation in education

Primary and secondary schools are increasingly outsourcing aquatics and sport provision to external providers. Many school pools have been closed,[50] with swim education moved into community venues.

Quality assurance and the Vulnerable Children Act

There is significant variability in the standards, requirements and vetting applied to external sport and recreation providers, and an increased focus on quality assurance of both individuals and organisations. This is being driven in part by the obligations under the Vulnerable Children Act 2014[51] and 2015 health and safety legislation.

A continuing focus on obesity

Bringing down the national obesity rate remains a key government imperative, and sport and recreation programmes are a central platform of the national Childhood Obesity Plan.[52]

ECONOMIC

Health and safety compliance

Councils and large recreation providers are employing dedicated safety professionals to ensure they are meeting the requirements of the recently enacted new health and safety legislation. Many smaller businesses and organisations are struggling to manage the documentation and procedural requirements.[53]

Increased investment in wellbeing

Central and local governments are emphasising the concept of 'wellbeing' as a key outcome of sport and recreation programmes, and funding is being targeted at initiatives that draw clear links between physical activity and social, emotional and psychological benefits for New Zealanders.[54]

Amalgamating to survive

Traditional sports clubs are moving to the 'sports hub' model, and grouping together to offer a range of activities in one location.[55] This is helping to grow the member base and maintain viability at a time of declining participation in club sports.

Lesley Kidd
Administration Manager
Karaka Sports Park

In response to the declining membership of traditional sports clubs, an increasing number of multi-sports hubs are now being developed. The workforce has had to learn to adapt to this new operational model.

The Karaka Sports Park was set up in 1985. Different sports groups didn't have great facilities, so they came together and developed the multi-sports complex. When you join any of our codes, you automatically get membership to the Sports Park, and use of all of its facilities.

Our codes have expanded over time, but currently we have rugby, touch, tennis,cricket, baseball, netball, and a pilates group. Our clubhouse is also used for meetings; we hire our facilities out for functions; we have a cafe and bar, changing rooms, gear sheds and cricket nets. On a whole, we offer better facilities because we work together, and working together saves time and gives the clubs more money to operate their code and buy equipment.

Our membership has continued to increase over the years, and we have so many people who play a variety of sports. While you are down here playing tennis, you might meet someone who is doing cricket, so you might go and join them because you are mingling with each other.

The idea of a multi-sports complex is the way everyone is going now; it's what the councils are wanting to fund. So, we are way in advance, because we have been doing it for 32 years.

[50]*Save Our School Pools Campaign, Water Safety NZ, www.watersafety.org.nz* [51]*Vulnerable Children Act Requirements, Oranga Tamariki, www.mvcot.govt.nz* [52]*Press release: 15 indicators to help monitor childhood obesity, Jonathan Coleman, June 2017* [53]*Small businesses still getting to grips with new health and safety law, Stuff, 2016* [54]*Shift: encouraging physical activity & wellbeing, Wellington City Council, www.wcc.govt.nz*
[55]*Hubs and Sportvilles: Introduction, Sport NZ, www.sportnz.org.nz*

Trends/Issues/Risks

SOCIAL

A more individualistic and time-poor society

Membership of traditional sport clubs continues to decline.[56] New Zealanders are instead choosing to participate on their own schedule, through user-pays exercise or solo physical activity.

Busy households and the growing demand for both parents to work are also putting pressure on the volunteer workforce, specifically on the number of hours people are volunteering.

Access to play

Local authorities are emphasising the importance of development through unstructured play for children and young people, and channelling resources toward more open spaces for active recreation.[57, 58]

Shift in New Zealand sporting culture

Some of New Zealand's most popular sports, like rugby and netball, are decreasing in participation numbers. Meanwhile, other traditionally smaller sports, such as futsal and basketball, are gaining popularity. Motivating factors include: New Zealanders being more risk averse, and parents directing their children to activities with less risk of injury; the growing ethnic diversity seeing popularity of other internationally played sports on the rise; and our time-poor society, which is seeing people opting for quick, fast-paced and flexible activities that they can access at different times and places.

TECHNOLOGICAL

Screen time

Sport and community recreation continue to vie with streaming, gaming and computing, among other forms of sedentary recreation, for the leisure time of New Zealanders.

Capturing the social media audience

Sports clubs, both professional and grassroots, are continuing to use social media as a tool to engage their user base, whether members or spectators. Facebook live streaming, and Instagram stories are some of the newer techniques teams and clubs are using to capture fans through video.

Training environment

In 2013, some 44.7% of people working in the sport and community recreation industry held a post-school qualification. Of these, 30% held a level 5 diploma and 20.6% held a bachelor's degree or higher. However, these qualifications may not be directly relevant to the industry.

On-job training in the industry is delivered through a combination of in-house learning and collaboration with other providers, such as industry training organisations.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION[59]

The industry has identified cost as the biggest barrier to training and qualifying staff, particularly the cost of:

- Access and availability of suitable training
- Assessment of staff for organisations where in-house assessment is not available.

In addition to this, the industry reports the following as further barriers:

- High staff turnover
- Ability of the workplace to coordinate relevant training
- Staff personal commitments
- Lack of senior roles opening for staff to develop into.

CURRENT AND FUTURE SKILL NEEDS[60]

Sport and community recreation employers would like to see more training options in the following areas:

- Technical skills
  - Lifeguarding and swim coaching
  - Sport coaching
  - Facility operations
- Training in new technology
- Customer service and administration tasks
- Tikanga and Te Reo Māori
- Management
- Marketing and sales.

[56] *Sports clubs tackle decline in player numbers; Radio NZ, July 2017* [57] *Playgrounds of the Future; Hamilton City Council, www.hamilton.govt.nz*
[58] *Tākaro – Investing in Play Discussion Document, Auckland Council, www.shapeauckland.co.nz*

[59] *Workplace Survey, Skills Active, 2017* [60] *Workplace Survey, Skills Active, 2017*