

# FUTURE OF RUGBY CLUBS

SNAPSHOT | 2023



VISITOR  
SOLUTIONS  
& PARTNERS





# INFORMATION

## PURPOSE

One of the four pou of New Zealand Rugby's Strategy is "Rugby at the Heart of our Communities." A key component of achieving this (and the wider strategy) is to ensure that each rugby club, as a key deliverer of the game, is sufficiently focused, aligned, strong, and supported to achieve its purpose (within the context of regional and local needs).

To deliver on New Zealand Rugby's Strategy, the rugby club network must ensure that it can survive and thrive beyond the next 25 years. This project aims to determine the current state of the rugby club system and identify its preferred future state. It also seeks to outline the transformational steps required to achieve this preferred state and attain network longevity.

## WHY

Clubs have experienced considerable change over the last 150 years and have adapted with varying levels of success – as evidenced by the overall decline in club numbers. The advent of professionalism in 1996 was arguably the most significant event in recent times. New layers of professional competitions emerged, and with them, clubs' impact and influence over contributing to talent pathways for Provincial Union teams, Super teams, and the national team started to diminish.

Additional factors, such as the growing significance of performance rugby in Secondary Schools, falling participation, decreasing revenue streams, reduced volunteerism, an increasing trend for more recreational and unstructured activity, and rising social expectations of rugby club environments, have all continued to disrupt club stability. Factors such as these now threaten the presence, if not survival, of many rugby clubs and underscore the need for national and regional strategies to support clubs and the wider club network.

## METHODOLOGY

Due to the complexity of the rugby club landscape, various approaches were used to fully understand the current and required future state of rugby clubs.

This included club, participant and Provincial Union surveys, one-on-one interviews with clubs, Provincial Unions and a wide cross-section of stakeholders (funders, Councils, international rugby unions and other codes) and club workshops. These approaches are further outlined in the Full Report.

The scope of areas to be addressed in this project has been categorised under seven broad headings:

1. Strategic,
2. Environment,
3. Financial,
4. Experience/Offerings,
5. Capability and Capacity,
6. Compliance,
7. Facilities.

While many of these areas are intertwined and have interdependencies, this snapshot reflects insights and findings on each topic area individually.

### IMPORTANT NOTE

This version has been prepared in a high-level snapshot form. It should be read in conjunction with the Full Report to gain additional detail, greater context and understanding.



# what we found

across the 7 topic areas

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# STRATEGIC

Concentrates on the purpose of clubs, their direction and planning, structure, and the people involved in leading (committees and boards).

Key findings include:



## OUR CLUB'S PURPOSE – TOP 3 ATTRIBUTES

- Avenue for sports participation.
- Fun and safe environment.
- Positive, welcoming and inclusive environment.



## POSITION IN THE COMMUNITY

- Around 1/3 of responding clubs believe they are struggling to remain relevant or have already lost relevancy in the community.



## COMMITTEES AND BOARDS

- Typically, a **high number of committee members (40% of clubs have 11+)**, but the **workload is thrust on 3-4 key individuals**.
- Lack of understanding of **roles & responsibilities**.
- Many clubs are forming **alternate structures or ways to operate** to reduce workload.
- **Limited diversity** – 55% aged 31-50; 36% aged 51+; 68% European; 68% male.
- Most governance groups are **making a positive impact**.



## CLUB PLANNING

- **Limited** strategic and annual planning.
- More focus and resources placed on **'senior rugby'**.



## CHANGE

- Change is typically **driven by 'crises'**.
- Commonly **linked to** financial pressures, governance unrest, facility-related projects and difficulty or inability to field a senior team.

## WHAT'S NEEDED



CLEAR FUTURE PLANNING TO DRIVE THE CLUB FORWARD.



ENSURING OUR GOVERNANCE STRUCTURES AND APPROACHES CAN DELIVER OUR 'FUTURE PLAN' (SUITABLE SET-UP, SKILLSETS, DIVERSITY & CAPACITY).



OUR COMMITTEE/BOARD MEMBERS HAVE CLEAR ROLES AND RESPONSIBILITIES AND THE NECESSARY TOOLS TO OPTIMISE THEIR INPUT AND SKILLSET.



RED FLAGS AND MARKERS ARE IDENTIFIED AND MONITORED SO THEY CAN BE ACTIONED AS REQUIRED (BEFORE A CLUB REACHES A CRISIS POINT).



GREATER COLLABORATION AND CONNECTION ACROSS THE RUGBY ECOSYSTEM.

More information can be found on pages 16-17 of the Full Report.



# CAPABILITY AND CAPACITY

Focus is placed on the day-to-day running of club operations, with a primary view on people resource.

Key findings include:



## VOLUNTEERS

- Around 2/3 of clubs **have enough volunteers**, but it continues to be a **struggle year-on-year**.
- Over a quarter of responding members **encountered issues** with volunteers being available to assist or run their teams.
- **A devoted and loyal volunteer base still exists within rugby clubs**, providing **significant club service**.
- 47% of responding members indicated they were interested in **helping their club more**.
- Most volunteers **feel recognised and appreciated** (75%). Although most clubs provide **limited formal or structured support** for volunteers.
- 1/3 of clubs expressed there is now an **expectation** for certain **roles to be paid**.



## PAID STAFF

- The **highest proportion** of staff are associated with **food and beverage**.
- Around 1/3 of responding clubs had **paid club administrators**.
- There is a **mix of roles and structures** used by clubs – with **wide-ranging opinions** on how well the roles are working.



## RESOURCES

- Most coach and manager resources are **created** in the **club environment**.
- Clubs need more support – some feel too much focus is placed on **'the game' and not capability**.
- Desire for more face-to-face, personalised and informal **development opportunities** to complement other material.
- Some **lack of awareness** of what is currently available.



## MARKETING & COMMUNICATIONS

- **More support** is required for urban clubs.
- **No overarching marketing campaign** for community rugby, with most activity focusing on professional rugby.
- Content production and implementation are primarily left to **younger club members**.
- **Video content** is the most popular and shared material.
- Members prefer to be contacted via **email and Facebook** (need to consider matching the target **demographic with the right material**).

## WHAT'S NEEDED



TAPPING INTO THE EXISTING VOLUNTEER NETWORK MORE, WITH CLEARLY DEFINED TASKS.



SEEKING INSIGHT FROM MEMBERS ON HOW MUCH TIME THEY COULD SHARE WITH THE CLUB AND THEIR PARTICULAR AREAS OF INTEREST.



ESTABLISHING A COMPELLING CASE TO VOLUNTEER – CREATING ATMOSPHERE (SIMILAR TO EVENT-BASED FEEL AND CONNECTION) AND CLUB UNITY.



UPSKILLING AND PROFESSIONAL DEVELOPMENT OPPORTUNITIES, PARTICULARLY FOR CLUB CAPABILITY ROLES – THIS IS EVIDENT ACROSS THE SPORT AND RECREATION SECTOR.



A COORDINATED MARKETING CAMPAIGN WITH SUPPORTING MATERIAL TO PROMOTE AND DRIVE COMMUNITY RUGBY.

More information can be found on pages 18-21 of the Full Report.



# EXPERIENCE AND OFFERINGS

Experience and offerings are at the heart of what a club provides members on and off the field. For most people, the quality of these experiences shapes how they engage and connect with the club environment.

Key findings include:

## DELIVERING QUALITY EXPERIENCES



- Overall, members are **very satisfied** with their club experiences.
- Having a **'balanced focus'** was rated more moderately - with some perceptions that **too much focus is being placed on seniors (and not enough on youth)**.
- 85% of members are **likely to play next season**.
- Clubs have **lower confidence** in delivering positive experiences to **women and girls, Māori and Pasifika communities**.

## RUGBY INSIGHTS



- Most clubs field a **senior team – part of their identity**.
- Urban and larger clubs are more likely to provide **wider playing offerings** to the community.
- Notable **drop-off** when **transitioning** from rippa to contact rugby.
- **Summer-related activity** and **engagement with other codes** are becoming more prevalent.
- 81% of clubs have used **'Game On'** to reduce the number of defaults.
- **Combined teams** are used but met with polarising opinions.
- There is an **'arms race' for attracting players** at a senior level.

## WOMEN AND GIRLS



- **Women and girls** - several **perceived constraints have been identified that prevent establishing or growing the game** (e.g., infrastructure, additional club resources, conflicting access, destabilising other club teams and needing wider regional support to deliver).
- **Successful delivery** has been **fostered by initiatives** such as game centralisation, dedicated or gender-neutral facilities, school, other code and community connections, committee/Board level representation, and provincial support.



## MIDWEEK GAMES

- There is strong interest in **exploring more, or introducing, mid-week games** under lights (more aligned with urban areas).
- **53% of clubs** have moved more matches under lights.
- **46% of members** indicated they would like more matches under lights.
- **Opportunities** include 'freeing up' the weekend, using the space during off-peak times, creating new revenue potential, attracting and retaining players, and volunteering opportunities that may arise.
- **Challenges** cited include suitable infrastructure (fields and lights), cost and responsibility, travel times, loss of bar revenue, conflicting schedules with other codes and playing conditions (temperature).

## SOCIAL ENVIRONMENT



- Just as **important** as the on-field experience
- **Wide-ranging offerings** include supporter membership, other sports, fitness programmes, activities to encourage longer stays (e.g., outdoor basketball hoop), and food.
- **Kai is central** to club engagement and connectivity.
- Need a **whole-of-club approach** – connection throughout for all members. Establish a safe space with ownership and belonging.

## WHAT'S NEEDED



**CLEARLY UNDERSTAND AND COMMUNICATE WITH THE MEMBERSHIP AND WIDER COMMUNITY - RESPONDING TO OUR COMMUNITY NEEDS IS ESSENTIAL.**



**SHARE IDEAS, TRIAL, SHAPE AND IMPLEMENT INITIATIVES AND APPROACHES – WE NEED A STRONG CONNECTED NETWORK OF CLUBS.**

Note: Developing a quality experience cannot be achieved in isolation and relies on addressing the other topics outlined.

More information can be found on pages 22-25 of the Full Report.



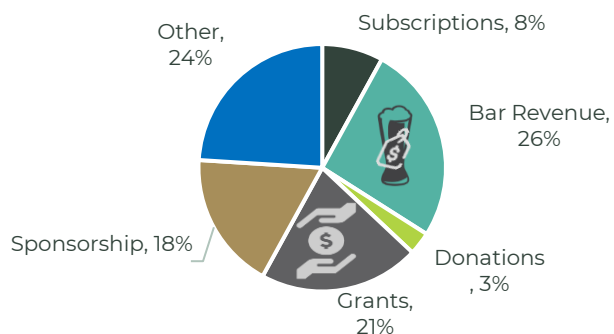
# FINANCE

A triangulated approach was undertaken to gain a full understanding of the financial health of rugby clubs. This included analysing financial statements of 111 clubs, gaining survey insights, and interviewing clubs and funders.

Key insights include:



## REVENUE



- **Strong reliance** on bar revenue and funding grants.
- **High variability** across clubs regardless of membership size and geographic setting.
- **Player subscriptions** represent a **small proportion** of revenue.
- Clubs are **generally well-connected** to tap into sponsorship opportunities within their local communities.



## GRANT FUNDING

- Rugby receives a **high proportion of grant funding**, which will likely continue.
- Some **decline in Class 4 gaming venues in rural settings** could impact distribution in the future. While in some areas funds are **unable to be expended**.
- Funders are becoming **more strategic**. Large capital works are now more focused on multisport and hub developments to **maximise investment value**.



## COSTS

- **Property costs** (mainly repairs and maintenance) account for 26% of expenditure for clubs.
- **In-kind services and materials** are unquantifiable but were noted as being critical for the club.
- Some concerns cited a potential **imbalance of resources** being allocated to senior and premier players/teams (potentially at the expense of juniors and youth).
- Increasing **utility and insurance costs** are concerning and **diverting funds** away from key club focus areas.



## KEY POINTS

- There appears to be a reasonable level of financial competency.
- In general, clubs are performing better than breakeven – however, there is a reliance on operating grants.
- Large capital projects are likely to be the catalyst for financial strain and/or the need to explore alternate approaches.
- Connection with current and past members is critical for the ongoing viability of clubs.
- Need to keep a watching brief on any legislation change which may impact bar margins and/or sponsorship.

## WHAT'S NEEDED



**CONTINUE TO FOSTER RELATIONSHIPS WITH CURRENT AND PAST MEMBERS.**



**COORDINATE FUNDING, SPONSORSHIP & BULK BUYING OPPORTUNITIES – USING THE SCALE AND PROFILE OF RUGBY.**



**SUPPORT TO DIVERSIFY REVENUE AND OFFERINGS TO REDUCE RELIANCE ON 1 OR 2 AVENUES.**

More information can be found on pages 26-30 of the Full Report.





# ENVIRONMENT

The club environment encapsulates diversity, safety, and the ability to create a positive and inclusive club setting for all to experience. This has a direct connection to, and builds upon, delivering positive experiences outlined in 'Experience and Offerings'.

Key insights include:



## DIVERSITY

- Clubs have a lower view of their ability to deliver positive experiences to members with **diverse cultural backgrounds**.
- **80%** of clubs would appreciate **more support and insight to encourage and value cultural diversity**.
- **76%** of clubs would appreciate support to learn more about **Kaupapa Māori** – more interest in **urban-based** clubs.
- **Rural-based** clubs cited more interest in **general cultural diversity support**.
- The **lowest relative rating** for creating a safe and welcoming environment was associated with the **LGBTQIA+ community** – this rating was shared by club and member responses.



## WOMEN AND GIRLS

- Clubs generally rate their ability to promote, recruit and **support females across all facets of the club**.
- While the landscape appears to be changing, **more support and understanding of the associated benefits** are required to fully integrate **women and girls within the club setting**.



## CHILDREN

- **Limited formalised child safety practices** are in place across clubs, and there is a level of trepidation around its implementation.
- **Extensive resources already exist** for child protection. Therefore, awareness and practical support are required to formally **establish safe practices** within the club setting.



## SOCIAL ENVIRONMENT

- Overall, clubs maintain a **positive outlook** on their ability to cultivate a safe and engaging **club environment**.
- Members are generally satisfied with the social environment, with slightly lower ratings by female, Māori and Pasifika members.
- Alcohol is **not perceived to negatively impact** club activity or the overall environment.
- Many clubs and members believe that **alcohol is integral for social connectivity** at the club – and the bar a must-have offering.
- Around 50% of clubs indicated there would be a **high number of members leaving** if they **didn't have a bar**.

## WHAT'S NEEDED

The following features were identified by clubs as being central to creating a positive club environment:



UNDERSTANDING & REFLECTING COMMUNITIES.



REACHING BEYOND RUGBY – PROVIDES COMMUNITY CONNECTION & SUPPORTS WELLBEING OUTCOMES.



STRONG CONNECTION BETWEEN JUNIORS & SENIORS.



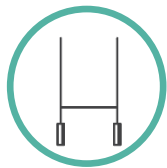
ALL GRADES ARE SEEN AS EQUAL WITH NO HIERARCHY.



KAI IS CENTRAL TO BRINGING PEOPLE TOGETHER.

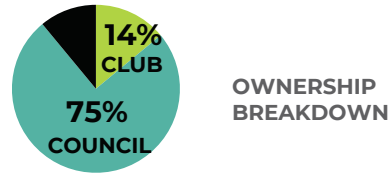
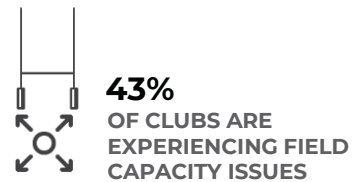
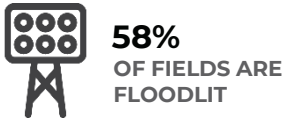
More information can be found on pages 31-32 of the Full Report.





# FACILITIES

## PLAYING FIELD INSIGHTS



## CLUBROOM AND CHANGING ROOM INSIGHTS



## OVERALL CLUB VIEWS ON THEIR FACILITIES

- **72%** of clubs are **financially sustainable**.
- **68%** of clubs expressed good **stakeholder relationships**.
- **68%** of clubs have **fit-for-purpose** facilities.
- **67%** of clubs have skillsets to **manage assets**.
- **65%** of clubs are considered a **'safe space'**.
- **53%** of clubs **optimise the use** of their facilities.
- **50%** of clubs have **facility management plans**.

## WHAT'S NEEDED



CLUBS NEED GOOD QUALITY FIELD LIGHTING TO ENABLE CHANGE AND TO REMAIN A RELEVANT OPTION FOR PARTICIPANTS.



THERE IS STRONG NEED FOR CHANGING ROOM UPGRADES TO BE FIT-FOR-PURPOSE AND ALL-INCLUSIVE.



AGEING ASSETS WITH INCREASING CONDITION ISSUES WILL REQUIRE PIVOTAL/HARD DECISION-MAKING. CLUBS WILL NEED TO DECIDE 'WHERE TO FROM HERE' IN A MORE CONSTRAINED FUNDING ENVIRONMENT.



WIDER COMMUNITY HUB/MULTISPORT APPROACHES.



EXPLORE OPPORTUNITIES TO OPTIMISE THE USE OF FACILITIES AND CREATE STRONGER COMMUNITY CONNECTIONS.

More information can be found on pages 33-35 of the Full Report.



# COMPLIANCE

Due to the nature of rugby club operations, clubs are now obligated to oversee a range of compliance areas.

Clubs were **generally comfortable** with their level of compliance with the following:



LIQUOR LICENSING



EMPLOYMENT



FOOD & BEVERAGE



LEGAL STATUS



FACILITIES

## COMPLIANCE SUPPORT

There are three key areas where clubs cited they need the most support:



HEALTH & SAFETY

**51%**  
OF CLUBS ARE FULLY COMPLIANT

**44%**  
NEED SUPPORT



SAFE KIDS / CHILD PROTECTION

**39%**  
OF CLUBS ARE FULLY COMPLIANT

**54%**  
NEED SUPPORT



GENERAL MEMBER PROTECTION

**25%**  
OF CLUBS ARE FULLY COMPLIANT

**60%**  
NEED SUPPORT

## CHALLENGES RAISED BY CLUBS

- **'Red tape'** diverts attention away from core club activities.
- While it is acknowledged why compliance is in place, it is perceived to be making **club delivery more complex and burdening**.
- Gaining access to, or being aware of, **supporting resources**.
- **Perceived cost and process** for some compliance.
- **Instilling fear** in retaining and recruiting **volunteers** and more **administration**.
- **Clubs are not always the decision-makers** or owners concerning some compliance matters.

## WHAT'S NEEDED



CLEAR COMMUNICATION CHANNELS ARE REQUIRED WHEN RESOURCES ARE DEVELOPED TO ASSIST AWARENESS (ESPECIALLY THE RATIONALE BEHIND NEEDING THE RESOURCE) AND IMPROVE UPTAKE.



EASILY ACCESSIBLE AND DIGESTIBLE COMPLIANCE CONTENT/MATERIAL.



SIMPLE CHECKLIST TO PROVIDE CLARITY ON WHAT IS NEEDED TO COMPLY.



PROVIDE MORE OPPORTUNITIES FOR SPECIALISED SUPPORT TO HELP CLUBS EFFECTIVELY APPLY RESOURCES (PROVIDING KNOWLEDGE ON WHY IT IS REQUIRED AND HOW TO USE THE MATERIAL).



PROVIDE ADDITIONAL OPPORTUNITIES FOR CLUBS TO DISCUSS AND WORK TOGETHER ON COMPLIANCE RESPONSES.

More information can be found on page 36 of the Full Report.



**what this means**

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# KEY CONCLUSIONS

## CHALLENGES

Some of the key identified challenges facing the rugby club network are:

- 1. There is notable distrust and lack of alignment** through rugby's hierarchical levels. This needs to be addressed for effective club changes to occur. This includes:
  - a. Needing greater clarity on purpose, roles and responsibilities.
  - b. Agreed communication channels and aligned messaging.
  - c. Stronger club connection opportunities.
  - d. More balanced approach to club wellbeing (not just game-related)
  - e. Clear transparency on club capability investment and outcomes.
  - f. Defined club action plans.
- 2. Changing mindsets** in a very **traditional club setting** with strong viewpoints and historical connections can be hard. Change in many cases has been driven from crisis.
- 3. Overall, member decline is having wide-reaching** impacts.
- 4. Achieving 'fit-for-purpose' facilities** will become **increasingly complex and costly**.
- 5. The need to understand and reflect societal change** in the club environment. This requires understanding the way participants (current and prospective), supporters and the wider community want to engage in rugby club activity.

More information on the key conclusions can be found on pages 37 to 39 of the Full Report.

## OPPORTUNITIES

A variety of opportunities exist for the rugby club network. These include:

- 1. Sharing, learning and implementing the positives** – there is a raft of positive initiatives evident across all facets of rugby club operations.
- 2. "For the betterment of rugby"** – the rugby club community acknowledged that **rugby needs to focus more on what is best for the network and not just their club**.

When united and channelled, these sentiments can serve as a powerful force to bring us together as a code, with clubs at the heart. This involves identifying opportunities for clubs to share information and better coordinate activity, fostering a sense of shared responsibility and unity.

- 3. Working collaboratively/having direction** – this approach is all-encompassing and involves:
  - a. Supplementing club resources to drive initiatives.
  - b. Establishing clear and agreed action plans between New Zealand Rugby and Provincial Unions to support the club network.
  - c. Establish clear and direct communication channels.
  - d. Placing more emphasis on demonstrating the value of the community game, how it is marketed and coordinating the messaging used.
- 4. Resources** – optimise and collaborate on existing material.
- 5. The network** – rugby's prominence and reach across local communities remains strong and provides a broad foundation from which to build and leverage.
- 6. Capitalise on the profile** – rugby maintains a high profile in the community and with stakeholders. This profile can be further harnessed and leveraged to support the club network moving forward.



## MOVING FORWARD

The full report prepared a recommended 'Response and Action Plan' to support the future direction of rugby clubs.

**More information can be found on pages 40-45 of the Full Report.**

The report highlighted the need for 'greater collaboration' and devising' a clear and agreed-upon action plan'. Following the report's publication, New Zealand Rugby and Provincial Unions will work together to agree on the implementation of the recommended actions.

It is imperative that the adopted Action Plan closely reflects the report's findings, as the recommended actions and initiatives were informed through wide engagement with the rugby club network. This will help build transparency and trust while focusing resources and support where they are needed the most.

Clubs will assume a pivotal implementation role, ensuring the proposed actions align with club and wider community needs and are tailored to suit the diverse club settings. This empowerment of clubs is key to the success of the Action Plan.

Moving forward, we need an ethos of "for the betterment of rugby," and a focus on supporting one another to thrive.



For more information on the Future of Rugby Clubs project, please contact your Provincial Union.



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