

# FUTURE OF RUGBY CLUBS

REPORT | 2023



VISITOR  
SOLUTIONS  
& PARTNERS



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New Zealand Rugby would also like to acknowledge Sport New Zealand's partnership and funding support in activating the project.

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# FOREWORD

## **Welcome to the Future of Rugby Clubs Report.**

There is a proud history of grassroots rugby in Aotearoa New Zealand. It has long been a valued thread of the Kiwi way of life, with the local club being a focal point of towns and cities across the country. Club rugby plays such a significant part in the story of our elite players that they proudly wear their club colours at treasured 'Club Nights' on tour.

At New Zealand Rugby (NZR), one of our four strategic pou is to ensure rugby is at the heart of our communities, and by extension, that communities are at the heart of rugby. We recognise that there have been significant challenges for rugby clubs in recent years. The advent of professionalism in 1996, and its growing footprint since then, is probably the most significant event in recent times as new layers of professional competitions emerged and the impact and influence that clubs had over contributing to the talent pathways for Provincial Union teams, Super Teams, and our Teams in Black started to diminish. Additional factors such as the growing significance of performance rugby in Secondary Schools as well trends around falling participation (players and volunteers), decreasing revenue streams, and rising social expectations of rugby club environments have continued to disrupt the stability of clubs. These challenges threaten the presence, and in some cases survival, of rugby clubs and this has led to the contemplation of a nationally led and regionally implemented strategy to support their future existence.

As a result, we sought to investigate the current state of club rugby and propose an Action Plan to ensure its continued place in our communities. This report addresses the strategic, operational, financial and systemic challenges that exist, and the opportunities and transformations that can guide NZR, Provincial Unions and clubs to future proof our rugby environments. In the pages that follow, you'll see the steps taken to gather data and experiences from over 200 clubs, 11,000 people, and sport organisations at every level. The findings and opportunities were then workshopped around the country to make sure they reflected the realities and aspirations of clubs in metro and rural settings.

The development of an Action Plan provides a framework for us all to follow. We recognise that each club and Provincial Union will be in different states of readiness, with different priorities and resources. Clubs are encouraged to engage with this report and the resources which will follow, identify the areas for improvement and development in their own contexts, and lean on each other and their Provincial Union for support.

We give our thanks to Sport New Zealand, who are big advocates of community sport. Their partnership and funding helped in producing a thorough, insightful report to inform the vision of a thriving club environment, where people are staying active, connected and enjoying themselves through rugby.

Relationships will be critical to the success of this plan. Between clubs and their communities, clubs and their Provincial Union, NZR and the Provincial Unions and beyond, communication, trust and support must be genuine and healthy. We all have the best intentions and ambitions for the game, and all have knowledge and skills to contribute to its success.

To close, I wanted to share this proverb which speaks to how the entirety of the rugby system can and should work together towards a sustainable and bright future for the heart of our national game:

***Ko te pae tawhiti whāia kia tata, ko te pae tata, whakamaua kia tīna.***

*Seek to bring distant horizons closer, and sustain and maintain those that have been arrived at.*

The power of the collective rugby system, fuelled by a passionate love of the game, can reimagine a sustainable future that will keep clubs at the heart of our communities, inspiring and unifying people for generations to come.

Steve Lancaster  
General Manager – Community Rugby  
New Zealand Rugby

# EXECUTIVE SUMMARY

While rugby clubs continue to be the lifeblood of rugby within New Zealand and serve as the game's direct connection to local communities, clubs are operating against a backdrop of new and growing challenges.

Club rugby has existed for over 150 years, so the concept of needing to adapt to survive is not new. The decline from a peak of up to 700 clubs nationally to around 450 clubs in 2023 is evidence of the level of attrition that has occurred and reflects the pressures that have impacted the wider rugby club network.

## CHALLENGES

As challenges have widened and participation has shown areas of decline, now is a pivotal time for driving forward and supporting club rugby's future. There needs to be a collective and coordinated response from across the rugby ecosystem to effect change, support club evolution, and ensure their relevance in their local communities.

To achieve this requires a clear understanding of the challenges that are facing the rugby club network. Some key identified challenges include:

- Notable distrust and lack of alignment through rugby's hierarchical levels (club, Provincial Unions and New Zealand Rugby).
- Changing mindsets are typically driven by crisis, as opposed to progressive change. There is limited or no future thinking and planning, and most clubs demonstrate limited leadership diversity (which is needed to reflect and understand community changes).
- A strong reliance on grant funding for day-to-day club operations. This reliance is set within a funding landscape that is constrained, and in some areas of the country, sinking-lid policies are reducing the number of gaming venues (and their associated community grant funding).
- A generally aging network of facilities, which are not necessarily fit-for-purpose and require ongoing investment. A high proportion of clubs have planned field or building developments. With a constrained funding environment, funders and key stakeholders are taking a more strategic approach around future investment (often favouring

community or multisport hubs). For many clubs, this requires a shift away from the traditional use and ownership models.

- An extremely high and increasing school churn rate, which is impacting the ability of clubs to field colts and senior teams. This, in turn, is creating an 'arms race' for players, which can have wider financial, social, and cultural impacts. These impacts are more pronounced when the population is either stable or declining. This also places pressure on clubs to collaborate to form teams, amalgamate or cease operations.
- Pronounced membership decline at the point junior players transition between non-contact to contact versions of the game. This could potentially heighten in coming years which would further lower the core junior cohort of players.
- A stretched volunteer base, which could exacerbate when linked to membership decline and increasing compliance responsibilities. There is strong reliance typically placed on 3-4 key individuals within the club. When these individuals leave, it often results in a vacuum of knowledge and skillsets.
- Access and connection within and between rural communities could become more difficult. Resulting in further reductions in players and teams due to extra travel commitments.
- Future participation modelling (reflecting participation trends and population outlook) suggests pressures are likely to be experienced when fielding teams across most club settings. Opportunities exist to expand participation through inclusive and attractive responses that appeal to different 'markets'.

Where this cannot be achieved, more collaboration will be required through Game On or other game initiatives, merged teams, satellite clubs, and/or amalgamation.

## WHERE TO?

While the landscape is beset with challenges, some clubs are thriving. Common features these clubs exhibited were good planning, proactive and diverse-thinking leadership, clearly articulated roles and responsibilities, close connections to their community, funders, and

stakeholders, strong connections between all parts of the club, and optimised assets and resources.

What needs to be fully recognised and understood is that “success” or “thriving” looks different from club-to-club and across different settings. This underscores the requirement for more nuanced support rather than standardised, one-size-fits-all approaches to club operations.

Supporting clubs requires a multifaceted approach using a balance of responses ranging from digital and print resources to human resources (training, facilitation, mentoring, and collaboration). A considerable repository of support material already exists. However, clubs have limited awareness of what is available.

When factoring in the pressures being experienced by already time poor volunteers, greater human resource commitment will be required to drive more impactful support delivery. Simply preparing templates and other written material alone will not suffice. It will also be critical that the adopted approaches are tailored.

Key focus areas should include:

- Achieving a clear and agreed action plan between New Zealand Rugby and the Provincial Unions on how investment, support and implementation will be effectively delivered to the club network.
- Having clear and direct communication channels with clubs (currently, messaging and resourcing are not necessarily received or translated well between all parties).
- New Zealand Rugby places more emphasis on demonstrating the value of the community game, how it is marketed, and coordinating the messaging used.
- New Zealand Rugby to continue reviewing secondary school rugby and its impact on the wider club ecosystem.

Achieving meaningful improvements across these four focus areas is imperative to creating greater alignment and transparency and providing clarity on roles and responsibilities to support the club network.

Other considerations that will be important are:

- Better enabling clubs to work together. Rugby will benefit most from having strong club networks and not just one strong club at the expense of three or four others around it. The ethos of “for the

betterment of rugby” needs to be enshrined with clubs at the heart of finding solutions and supporting one another to thrive.

- Sharing club initiatives from around the country (making sure to reflect different types of clubs across various settings).
- Updating existing resources and reviewing how material is stored and made accessible. There is a high lack of awareness of club support material that already exists.
- Capitalise on rugby's profile with an aligned and coordinated approach. Opportunities exist to leverage support, resources, and funding to improve club network outcomes.

Rugby also needs to overcome scepticism about how past initiatives have been delivered and monitored. Throwing money into the community game does not necessarily translate into effective change. Many from within the rugby community, and especially key stakeholders, were sceptical about how some funds have been administered and what impact the funding has had.

The report identified strong buy-in and willingness across rugby and the wider community to collaborate to make meaningful improvements in club rugby. Put simply, now is the time.

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# INTRODUCTION

## 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 ensure that it can 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.

## BACKGROUND & SCOPE

Rugby Clubs have been a long-standing institution in the development of the game of Rugby in New Zealand. Many clubs pre-date the formation of their respective Provincial Unions and New Zealand Rugby itself. As the game started to gather momentum in New Zealand in 1870, up to 700 clubs existed across the country, supporting participation and local competitions. This number has since been reduced to around 450 junior and senior rugby clubs in 2023. Notwithstanding this, Rugby Clubs remain important and influential on many levels.

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, the impact and influence that clubs had 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 both national and regional strategies to support clubs and the wider club network.

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 interdependent, this report is structured to reflect insights and findings on each topic area individually.

The review's insights stretch well beyond what is covered in this report, which is prepared in summary form. Other supplementary insights reports have been produced to capture additional detail and wider findings. There are also many positive examples of successful club initiatives that clubs requested be shared. This will be completed separately outside of this summary report in the form of case studies.

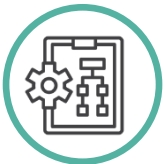
## METHODOLOGY

Due to the complexity of the rugby club landscape, a myriad of approaches were used to gain a full understanding of the current and required future state of rugby clubs. Key methodology components included:



### PRELIMINARY INSIGHTS

- **Club Survey Insights** – 226 individual club responses.
- **Provincial Union Survey Insights** – received by all unions.
- **Club Connect Conference** – staff of Provincial Unions.
- **Member Survey Insights** – Voice of the Participant findings + Community Survey = 11,000+ individuals.
- **Other** secondary data from New Zealand Rugby and Provincial Unions.



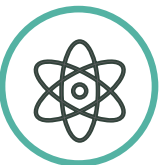
### BASELINE INSIGHTS

- **Survey Analysis Refinement** - across different settings (i.e. urban and rural, small to large, volunteer and paid structures).
- **Financial Insights and Modelling** – statistical sample of 111 rugby club financial accounts were analysed and refined.
- **Club Network Analysis** – membership trends from 2011-2022, club catchments defined, growth forecasting and impact, consideration of all other club insights.



### 360° INSIGHTS

- **International Rugby Unions** – interviews with Australia, England, Hong Kong, and Ireland unions.
- **Provincial Unions** – interviews with eight Provincial Unions.
- **Sector Organisations** – interviews with seven Regional Sports Trusts and Sport New Zealand.
- **Councils** – interviews with eight Councils across the country.
- **Funders** – interviews with seven local, regional, and national funders.
- **National Sports Organisations** – interviews with five National Sports Organisations.
- **Other** – various informal interviews with a mix of the above.



### ENGAGEMENT

- **Club Interviews** – one-one-one club interviews were held across the country.
- **Club Workshops** – 29 workshops were held across the country, with involvement from 234 clubs and attended by 442 club members. The club workshops were designed to outline initial key findings, discuss identified challenges and identify potential solutions/actions. A key outcome was gaining input and views on three prioritised topics from a wide cross-section of clubs. Ensuring insights were gained from clubs of different settings to avoid developing one size fits all solutions.
- **Project Steering Group Meetings**

### WHERE TO FROM HERE?



REPORT



DESIGN>PILOT>  
TEST>REVIEW>  
REFINE ACTIONS





## SCENE SETTING

Rugby clubs are operating in an environment that is experiencing a range of challenges both internally and externally. While many challenges directly relate to the report's brief, several concerning challenges sat outside of scope. Given the potential scale and impact of these challenges on the focus areas in scope and the frequency with which these concerns emerged, it was deemed prudent that they were outlined for completeness and transparency.

### THE RUGBY ECOSYSTEM

There is a prevalence of distrust and a perceived lack of direction across and between all levels of the rugby ecosystem (clubs, provincial unions, and New Zealand Rugby). Consequently, this leads to:

- Patch protectiveness: boundaries are set, limiting knowledge and resource sharing. Rugby is losing its 'for the betterment of the game' ethos.
- Roles and responsibilities are not being clearly understood when promoting, supporting, and delivering the game (including development pathways).
- Competition for and duplication of resources.

The initiatives, actions and future implementation strategies derived from this project can only have a meaningful impact if these issues are addressed.

New Zealand Rugby has signalled its intent to support community rugby through the Future of Rugby Clubs Project. This has, in turn, been greeted with resounding interest from the rugby community and key stakeholders (e.g., funders, Councils, and Regional Sports Trusts) across the motu. It is critical that this momentum is continued with implementation support.

### THE 'PLAYER MARKET'

Although grassroots rugby is considered an amateur game, player incentives, particularly across men's premier grades, are becoming more prevalent under many guises. This is in response to a declining and

increasingly pressured player pool and a desire from clubs to field competitive teams or at least 'be on the same level' as other clubs. This is effectively creating an arms race between clubs. Some clubs indicate that hundreds of thousands of dollars were being spent on fielding premier teams.

Consequently, this approach has an array of wider-reaching impacts including:

- a. Cyclical player movement from club-to-club,
- b. Scouting and importing players from neighbouring local clubs, other provinces or internationally rather than focusing on internal player development pathways,
- c. Local players become disillusioned by the lack of opportunities/pathways as new external players come into clubs. This leads to local players leaving their club and/or the sport altogether,
- d. As the 'player market' continues to intensify, club finances and resources are being stretched. This creates an uneven distribution of club resources as the focus is placed on premier/senior teams at the expense of other areas (i.e. junior teams, clubroom maintenance and renewals),
- e. Losing a sense of loyalty and club connection due to player turnover.

### SECONDARY SCHOOLS

While another specific workstream of New Zealand Rugby focuses on school rugby, it was regularly highlighted by clubs that secondary school rugby is adversely impacting club rugby.

To demonstrate school churn, Table 2.1 outlines the number of Year 8 club members over a six-year period and the conversion rate back into club rugby post-school. In the 2022 season, only 11% of club members in 2016 returned to the club environment. Since 2011, the rate of return has more than halved and continual decline is evident over an extended period - signalling a notable impact for clubs fielding colts and senior teams.

Rural clubs are likely to have a slightly higher return rate (13%), followed by large urban areas (12%) and smaller urban areas (10%). All settings have experienced a 50% decline in retention over a 4-year period.

A dynamic mix of school complexity and changing individual preferences (many of which stretch well beyond rugby) can influence return to the

club scene. Specific concerns have been expressed about concentration being primarily placed on 1<sup>st</sup> and 2<sup>nd</sup> XVs and less attention on other teams (no drive for wider rugby participation and limited coach and support resources), appropriate competition structures, and a lack of connection/partnership with clubs resulting in a lower return back into the club environment. It is important to fully understand when the drop-off is occurring within the school environment and the reasons why to help support clubs on how to effectively respond.

It is also important to profile players transitioning back into the club scene to understand retention levels. Table 2.1 indicates that around 60% of returning club members remain within the club environment for four years (around age 23) before leaving club rugby. This demonstrates that there is still notable attrition of players once they are attracted back from schools. This needs to be addressed for clubs to be able to field teams and maintain strong club connections effectively.

TABLE 2.1 – SECONDARY SCHOOL CHURN RATE FOR CLUB RUGBY

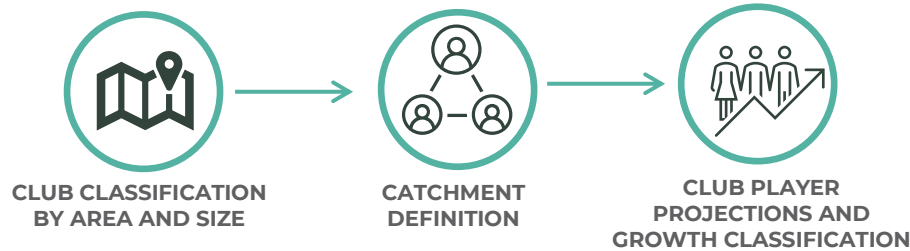
	2016	2015	2014	2013	2012	2011
Club Players in Year 8	4,716	4,529	4,857	5,082	4,961	4,670
Returned to Club - Y1	524	705	734	1,021	1,140	1,067
	11%	16%	15%	20%	23%	23%
Returned or Retained Y2		622	729	819	985	1025
		14%	15%	16%	20%	22%
<i>Change from Y1</i>		-12%	-1%	-20%	-14%	-4%
Returned or Retained Y3			576	798	791	912
<i>Change from Y1</i>			-22%	-22%	-31%	-15%
Returned or Retained Y4				550	685	662
<i>Change from Y1</i>				-46%	-40%	-38%
Returned or Retained Y5					544	654
<i>Change from Y1</i>					-52%	-39%
Returned or Retained Y6						536
<i>Change from Y1</i>						-50%



# RUGBY CLUB NETWORK

The New Zealand rugby club **network is vast**, with **considerable variation** across clubs. Understanding the nuances across the club network is important because a one-size-fits-all approach will be inaccurate and misstate growth potential. Such an approach will also not identify at-risk clubs. Historic growth patterns in player numbers and the relationships with a population in the wider catchments are used to estimate the club's outlook and potential.

The club network was reviewed using Club Participation Data spanning a decade – 2011 to 2022. StatsNZ and Market Economics' in-house demographic models and other third-party datasets were used to model the club network. The network analysis involved **three key steps**:



The classification approach captured the 'market' within which a club operates as well as the size of clubs. The market reflects New Zealand's urban-rural mix, and the clubs were categorised in terms of small, medium, and large. The size classification considered the size of clubs within each market type.<sup>1</sup>

Essentially, the classification approach yielded nine categories that form a matrix structure — three market areas and three size bands. This approach enables multiple facets to be considered in isolation or in combination. The key findings are highlighted below, with a focus on the salient features across the network, the growth potential, and the relative 'performance' of the club network.

<sup>1</sup> Appendix 1 presents a detailed account of the methodology, as well as the distribution of clubs across the markets and size bands.

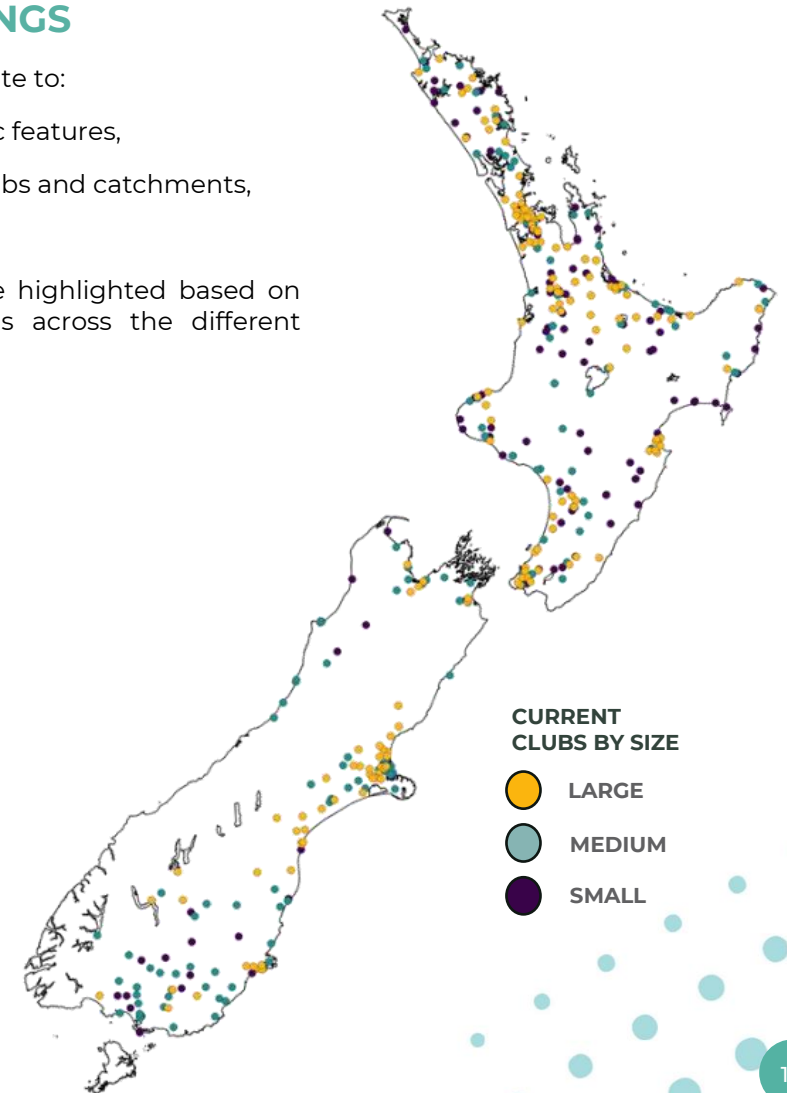
PLAYERS PER CATEGORY	SMALL	MEDIUM	LARGE
<b>Urban 1</b> (e.g., Auckland)	0-220	220-370	370-1,010
<b>Urban 2</b> (e.g., Whangarei)	0-120	120-200	200-630
<b>Rural</b> (e.g., Te Puna, Clyde)	0-50	50-120	120-440

## KEY FINDINGS

The findings relate to:

- Demographic features,
- Accessing clubs and catchments,
- Projections.

The findings are highlighted based on the observations across the different categories.



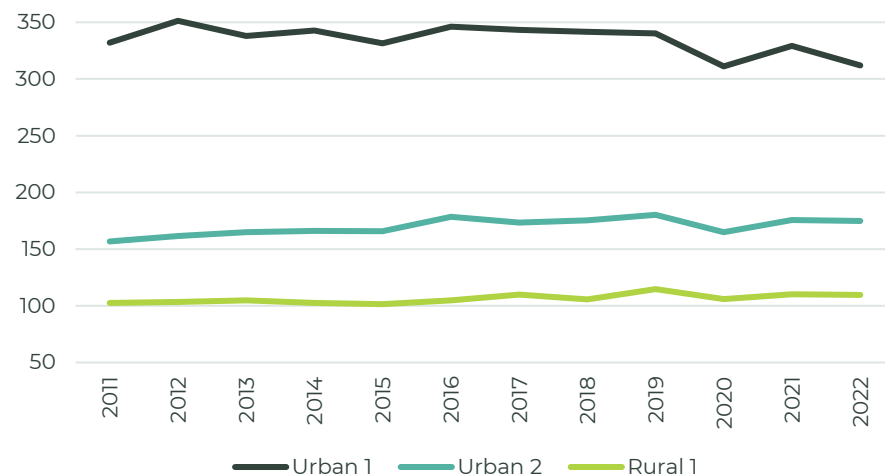
## DEMOGRAPHIC FEATURES

There is a direct link between the population in the catchment and player numbers. Changing demographics across New Zealand are influencing player participation and total trends. Notwithstanding the effects of Covid, NZ's population has seen positive growth over the past decade. The main features of the population included:

- Strong growth and population increase across NZ, with the population now over 5.2 million.
- A change in the mix of the population, with changing ethnicities, age structures and natural vs migration-related growth patterns.
- The main urban and economic centres have outperformed total NZ growth patterns.

Headline national growth patterns do not necessarily repeat at the club level. Average player numbers across the club network have remained broadly stable (see Figure 1) and did not match wider population growth. This suggests an opportunity may exist to capture new market segments by increasing linkages with a greater cross-section of the community.

FIGURE 1 - CLUBS' AVERAGE PLAYER COUNT PER AREA CATEGORY (2011 – 2022)



Observations about the distribution of players across the club network highlights:

- Spatially, players are concentrated in the large economic centres (Clubs located in Urban 1 locations). In 2022:
  - 50% of rugby members played for clubs located in Urban 1 areas,
  - 33% in Urban Area 2, and
  - 17% in Rural areas.
- Despite hosting most of the club players, Urban 1 clubs have been contracting, with the average number of players (per club) down 6% over the past decade. This contrasts with Urban 2 and Rural clubs which show club numbers growing. Reasons for these patterns could include:
  - Over the past decade or so, reverse-urbanisation (internal migration away from large cities) migration has been high with people moving away from Auckland and other cities to rural areas,
  - The population growth in Urban 1 areas has been fuelled by international migration, resulting in a shift in the market demand for different sports codes.

The changing demographics include shifts in the population age. Trends in player numbers per age cohort reveal the demographic shifts occurring at club and national level. Figure 2 and Table 1 show the trends per age cohort, the absolute change, and the percentage change over the 2011-2022 period.

- The importance of the young age cohort (5 to 12 years) is clear – this is across all club locations. Consistent with the changing population patterns that are seeing strong growth across the Urban 2 locations, this age cohort recorded considerable growth over the past decade. Overall, players in this cohort are up 9% since 2011, an absolute change of +3,280 players. The strong increase in this age cohort is also evident in the rural areas – player numbers are up +1,985 or 32%. However, in contrast, player numbers within this age cohort have remained relatively flat in Urban 1 areas.
- In terms of the proportional mix of players across age cohorts, after accounting for the trends in the 5-12 age cohort, the other age cohorts remained relatively stable. This means that the underlying player behaviour patterns (e.g., player attrition as they age) and rate of change are the main drivers of player numbers.

- It should be noted that a key feature of identified growth includes the uplift in player numbers following the 2011 Rugby World Cup.

FIGURE 2 - PLAYER COUNT BY AGE COHORT AND AREA CATEGORY (2011-2022)

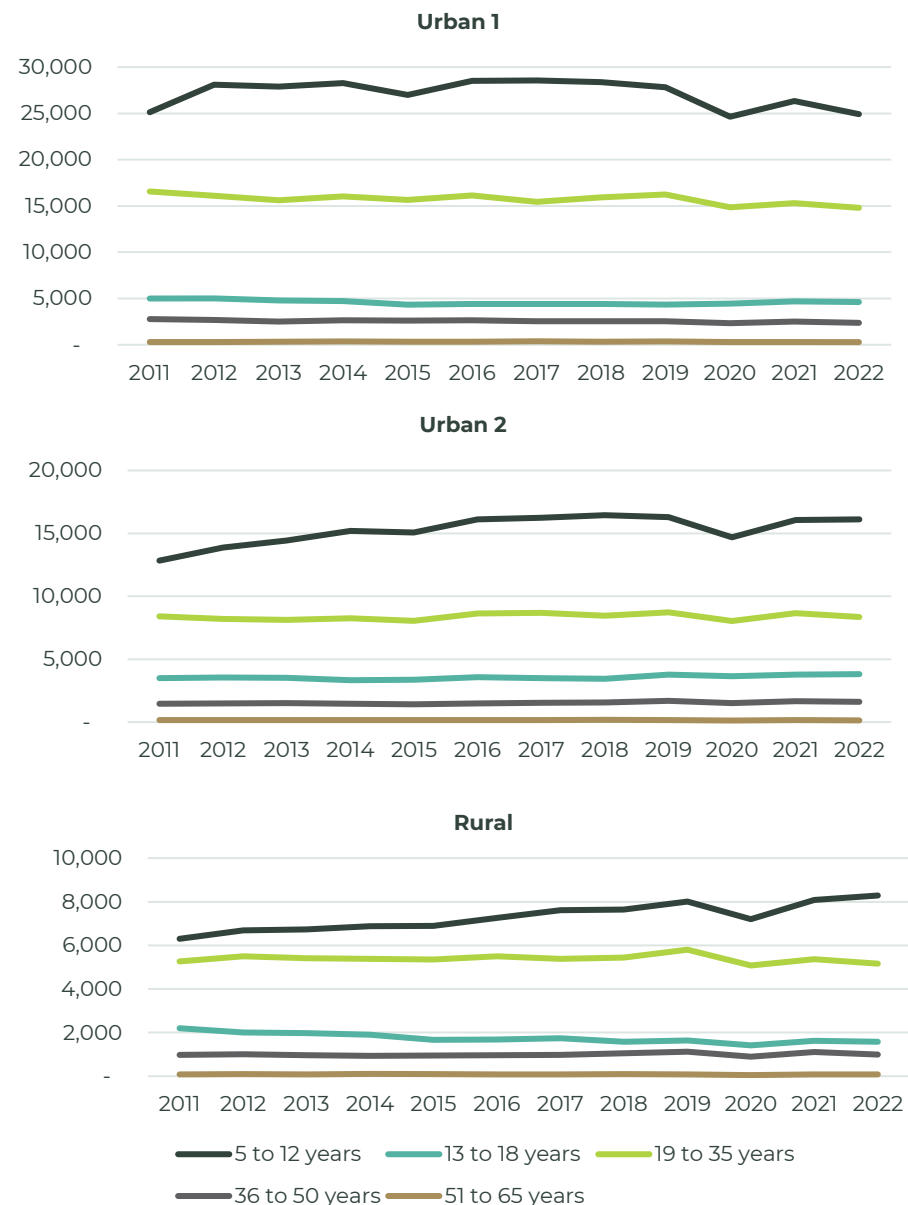


TABLE 1 - CHANGE IN PLAYER COUNT (NUMBER AND %; 2011 AND 2022)

AREA	Net Change (2011-2022)					Percentage Change (2011-2022)				
	5-12	13-18	19-35	36-50	51-65	5-12	13-18	19-35	36-50	51-65
Urban 1	-205	-395	-1,767	-402	-6	-1%	-8%	-11%	-14%	-2%
Urban 2	3,280	319	-60	156	-19	26%	9%	-1%	11%	-12%
Rural	1,985	-627	-101	26	-3	32%	-28%	-2%	3%	-4%



The growth patterns in the Urban 2 areas and the shifts in players across age cohorts provide important pointers to areas that could be targeted to support future growth. Building on the early player pipeline and retaining players via participation initiatives is key.

### WOMEN AND GIRLS – CLUB NETWORK

Overall, the club network is evolving to support the delivery of women's and girls' rugby. Most clubs have women and/or girls participating in rugby activity. Since 2015 there has been a 121% uplift in membership. The average number of females per club has increased from 13.8 to 30 since 2015, with minimal change in the number of clubs comprising female membership (increase of 9 clubs).

From a network perspective, the largest change has occurred in the senior space. Since 2015, 31 more clubs have introduced senior teams, supporting an increase of 1,329 senior players. The average number of senior players per club has increased from 19.4 to 24.2.

This growth demonstrates the impact female participation is having on overall rugby membership, either increasing or stabilising player numbers.

TABLE 2 – WOMEN AND GIRLS OVERVIEW

YEAR	ALL PLAYERS	# CLUBS	PER CLUB	SENIOR PLAYERS	# CLUBS	PER CLUB
2015	6,353	460	13.8	2,331	120	19.4
2019	12,556	463	27.1	3,362	138	24.4
2022	14,063	469	30.0	3,660	151	24.2

## ACCESSING CLUBS - CATCHMENTS

The ability to access club facilities is often taken for granted. The location of sports clubs is often based on historic decisions. The location of club facilities relative to where users come from offers insights into how willing users are to travel to participate in a sport. This willingness to travel reveals the distances associated with the clubs' relative attractiveness, and ability to 'capture' players.

The travel patterns are translated into catchments. Figure 3 shows how far players are travelling to access the facilities<sup>2</sup> and a 10km threshold is indicated by the vertical dotted line.

Clubs located in rural areas serve large geographic areas, and users travel considerable distances to access the facilities and participate in club activities.

**There is a clear difference between the distances travelled across the areas. These curves show the distance, but in the Urban 1 environment, congestion also plays a role. The distances are shorter in urban environments, but the overall travel times still determine convenience and influence player engagement.**

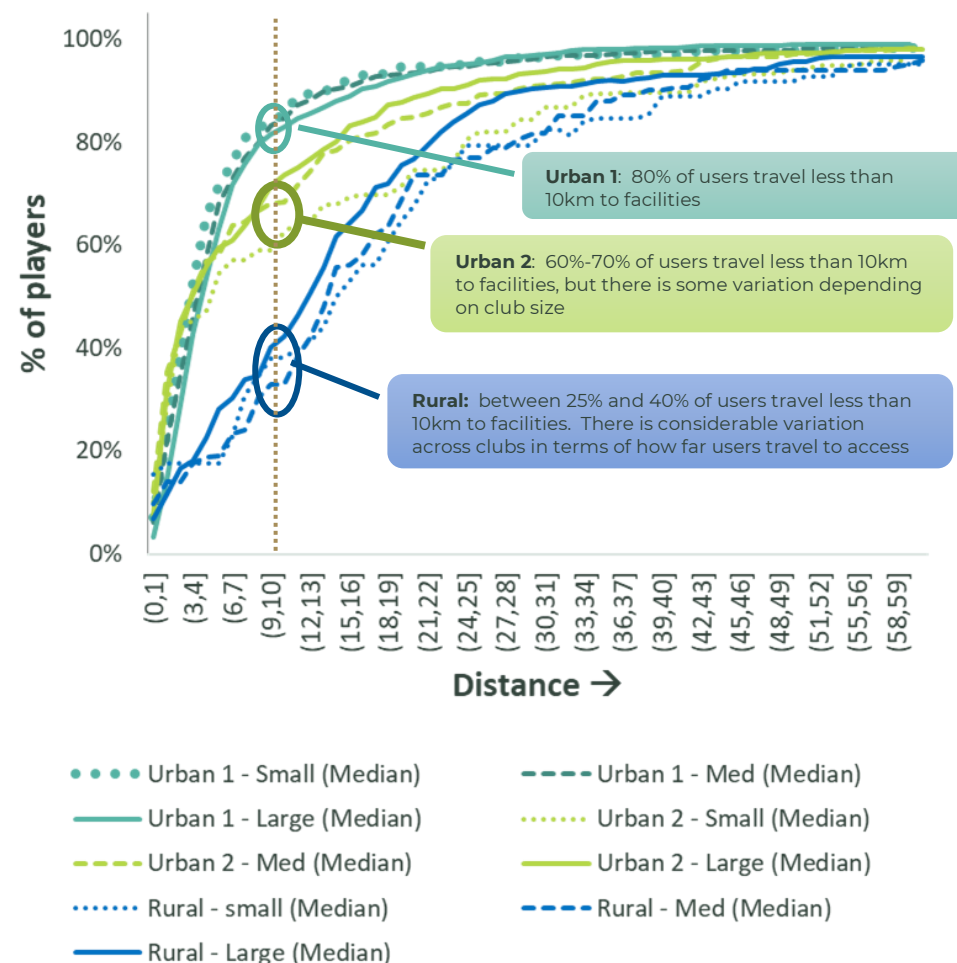
The decay curves reveal that:

- As the urban area size increases, players are less willing to travel long distances to access the facility. This is a function of travel times and inconvenience associated with the downsides of living in cities.
- A portion of players will travel considerable distances to access their preferred club(s).
- In the Urban 2 and Rural areas, the distances travelled increase markedly. This is especially the case for Rural clubs where more than 80% of players live more than 20 to 30 kilometres from their club.

The distance travelled assists in defining the catchments and can be used to identify the population being serviced. However, the travel times across the different areas and club sizes appear to suggest that the behavioural elements (relative convenience to engage in a club) are broadly consistent regardless of club location.

<sup>2</sup> The figures show the 'decay curves'. Essentially, these curves show what share (%) of players live within x-kilometres of the clubs.

FIGURE 3 - DECAY CURVES – DISTANCE TO CLUBS



## PROJECTIONS

Determining player projections considers multiple variables including population change, playing-age breakdown (this is further shown in Appendix 3), player attrition points (i.e. from non-contact to contact and secondary school churn) and an aging player base.

**The change in player numbers is compared against the aggregated anticipated shift across the entire club network. This approach uses the overall network as a benchmark, enabling club variation to be identified.**

The benchmark growth rates are summarised in Table 3.

TABLE 3 - GROWTH THRESHOLDS

AREA	SIZE GROWTH	SMALL CLUBS	MEDIUM CLUBS	LARGE CLUBS
Urban 1	Low	< 14%	< -10%	< -10%
	Medium	14% - 25%	-10% - -4%	-10% - -10%
	High	25% - 41%	-4% - 16%	-10% - -9%
Urban 2	Low	< -23%	< 8%	< 45%
	Medium	-23% - -20%	8% - 14%	45% - 46%
	High	-20% - 9%	14% - 30%	46% - 50%
Rural	Low	< -12%	< 7%	< 39%
	Medium	-12% - -7%	7% - 27%	39% - 44%
	High	-7% - 11%	27% - 65%	44% - 100%

Because the thresholds are based on the distribution across all clubs, the distribution is relative. More than half of the clubs are anticipated to experience growth below their catchment's growth potential. Over 80% of clubs in Auckland and Wellington RFUs (used as proxies for the large urban areas) are expected to grow below potential, suggesting that the expected decline in rugby players in these areas may be attributed to factors beyond demographics, such as cultural and social preferences.

**The analysis suggests that at-risk clubs, those with negative growth rates, are associated with the 'small clubs' across the Urban 2 and Rural areas. The negative growth, coupled with an already small player base, suggests that the growth outlook should be seen as an early warning about the ongoing sustainability of these clubs.**

**In Rural areas, the spatial distribution across large areas means that consolidation (combining clubs) could be a limiting factor (as drive times will eventually become too long). Alternative initiatives, such as using alternate training nights and holding games across venues, will likely be required to reduce barriers (in order to continue forming teams).**

**In Urban 2 areas, there are likely collaboration opportunities to create greater economies of scale.**

**Urban 1 clubs are generally larger, so they have existing scale to assist their ongoing activities. However, shifting player patterns and demographic pressures, as well as competition between clubs, mean that large clubs will face intensifying pressures to find innovative ways to attract and retain players.**

Appendix 4 presents the projected player numbers over 5-year increments.

## STRENGTHS OF THE CLUB NETWORK

Insights gained from Provincial Unions identified the following three features as being the most prominent core strengths of the rugby club network:



**COLLABORATION & CONNECTION BETWEEN CLUBS (& PUs)**



**REPRESENTATIVE OF LOCAL COMMUNITIES**



**REGIONWIDE SPREAD - WE'RE IN THE COMMUNITIES**

## CONCLUSIONS

- Unsurprisingly, Urban 1 clubs have the largest membership. However, like all clubs, demographic and preference shifts mean that over the medium to long term, these clubs can expect pressure on player numbers. However, their current size means that they have the opportunity to design innovative measures to retain their player base and expand their community reach.
- Across regional New Zealand, the Urban 2 and rural clubs have seen strong growth, especially among the young age cohort. This offers an opportunity to strengthen the medium-long-term pipeline and focus on attracting returning players.
- Regardless of the strong performance across large parts of the network, there are early warning signs. These offer both opportunities and risks. An aging population is a key element and individuals in the +36-year cohort will grow faster than the younger cohorts. This poses a risk primarily to smaller clubs, which generally have a lower retention rate of young players and lower population growth rates. Finding ways to retain or extend the time senior players remain associated with clubs could be an avenue to support club sustainability. Generally, older (+35 years) are moving into higher earning stages of their lifecycles - this could offer opportunities to 'give back' to clubs.
- Medium and Large clubs in the Urban 1 area are anticipated to experience the most substantial decrease in the average number of players. This is a function of their size, but also the changing nature of urban areas, a diversity of other leisure opportunities, and competition between codes for players.
- Growth opportunities are wide across many demographics, however, expanding participation will require inclusive and attractive responses that appeal to what each market segment requires.
- Where clubs have a declining outlook and/or are not able to capture a greater 'market share' of potential players, opportunities for greater collaboration between clubs will be required. This could be achieved through Game On and other game initiatives, merged teams, satellite clubs, and/or amalgamation.





# STRATEGIC

The strategic section of the project centres around club governance. It concentrates on clubs' purpose, direction and planning, structure, and the people involved in leading them (committees and boards). Key findings are outlined below and in the accompanying infographics.

- **Purpose:** Clubs overwhelmingly rated the following attributes as being central to their purpose:
  1. Providing an avenue for sports participation.
  2. Creating a safe, fun and inclusive environment.
  3. Providing a positive and welcoming environment.

The lowest-ranked attributes were providing pathways for professional players, winning competitions, and facilitating community engagement/interaction. The rankings on club purpose were identical to the insights gained across all Provincial Unions.

While winning competitions was rated relatively low in prioritising, clubs stressed the importance of having a winning premier team. Many clubs cited winning was linked to achieving player and coach retention and recruitment, used to 'market the club' across all playing levels, and was perceived to drive revenue (more spectators, hosting finals matches, larger bar turnover and sponsorship). As a direct result of these outcomes, more focus and resources are placed on premier teams, at times creating an imbalance and disconnect between junior and senior rugby.

- **Planning:** There is very limited strategic or annual planning across clubs. Rural clubs (77%) and small clubs (74%) are more likely not to have a strategic plan. At some regional project workshops, no clubs in attendance had strategic plans in place, although there was recognition that one was needed.

Rugby clubs, which had recently implemented strategic plans, commented on their ability to provide a collective vision and direction, unlock new and diverse funding streams and drive initiatives to increase participation.

Clubs appear to be more strategic in the 'senior space' than across the 'whole of club'. In many instances, an unbalanced focus and resources are placed on senior or premier rugby. For example, on how to field and/or form the strongest team(s). Many clubs cited a disconnect between junior and senior rugby as a result.

- **Our Set-up:** Rugby club committees/boards are characterised by having a large number of members. While large in nature, workload and decision-making in committees are primarily limited to or 'thrust upon' 3-4 key individuals. In addition to the undue workload pressure this creates, this reliance can be problematic when an individual leaves, as it creates a vacuum of knowledge that, in most cases, is not captured elsewhere.

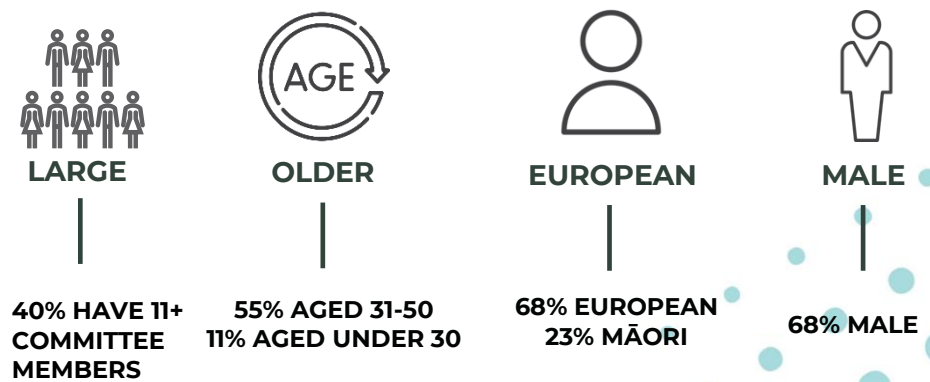
Many club members emphasised the need for position descriptions to clearly outline what they are responsible for. This also shows prospective members what each role entails.

Many clubs are starting to form executives and sub-groups and/or split out project-based tasks to reduce workload commitments. Thus, they are making the best available use of time and resources for both their current and prospective volunteers.

- **Diversity:** Overall, there is limited diversity across committee/board positions. Clubs citing higher diversity commented on greater connections with and understanding of their community, and greater diversity of ideas, skills, viewpoints, and initiatives (that often drove participation and greater inclusiveness in historically under-represented groups).

Diversity across committees and boards also provides an environment that demonstrates greater inclusivity and breaks down barriers (perceived or real), encouraging individuals to join and contribute.

## OUR GOVERNANCE PROFILE



- **Performance:** Overall, clubs rated the collective qualities of their committee/board relatively highly. The lowest-rated feature was the capacity to perform roles. From a self-elected response survey of around 1,000 members, 72% believed their governance group was having a positive impact on their club.
- **Responding:** Committees are very operational and have a traditional mindset and approach. While many see opportunities, they are not able to be proactive, as 'business-as-usual' is all-encompassing when operating with limited volunteer capacity. Many clubs and stakeholders commented on the difficulty for rugby clubs to evolve to reflect changing communities. One important reason for this was factions within clubs which are resistant to change, regardless of the significance of the catalyst. In many cases this is contributed to by a lack of diversity.
- **Change:** As numerous clubs and stakeholders identified, change within rugby clubs is typically driven by crisis. In many instances, this has been linked to financial pressures, committee/board unrest, facility-related projects (funders and stakeholders looking wider than standalone rugby club facilities), and the difficulty or inability to field a senior team.

There are common red flags and signs that intervention is required often long before clubs reach crisis point. Many were observed and emphasised during club engagement. It is when these 'red flags' are identified that planning for change should occur. However, workshop participants stated they were often not actioned (typically because of associated skillset deficiencies, knowledge gaps and lack of capacity to drive change). Responding too late can result in irreparable damage, as has been seen with many rugby clubs that are no longer in existence.

This may mean Provincial Unions, New Zealand Rugby and/or independent assistance is required to support these clubs before negative impacts influence the overall rugby club experience.

*“The club has always been run a certain way over the last decade so change to many who have been and are on committee do find change hard to grasp.”*

**Club Committee Member**

*“Think about the people coming through, not the people going out.”*

**Trust Chair**

- **Our Position in the Community:** Clubs are recognising the challenges they are experiencing in maintaining relevance in their communities. Over one-third of clubs who responded indicated they are struggling to remain relevant or have lost relevance altogether.
- Of note to these findings, rural clubs have a notably higher self-assessment of their standing in the community – with 71% of rural clubs considering they are a key focal point compared to 56% of urban clubs. This demonstrates the additional pressures that exist within urban settings which may impact club rugby.

**REMAIN A KEY FOCAL POINT IN THE COMMUNITY  
MOST IN THE COMMUNITY ARE CONNECTED TO THE CLUB** **64%**

**STRUGGLING TO  
REMAIN RELEVANT** **30%**

**6%** **WE HAVE ALREADY LOST RELEVANCY &  
NEED TO REINVENT OURSELVES**

## WHAT'S NEEDED

1. Clear future planning, which assists our decision-making, focus and resources for driving the club forward.
2. Ensuring our governance structures and approaches can deliver our 'future plan' (suitable set-up, skillsets, diversity and capacities).
3. Our committee/board members have clear roles and responsibilities and the necessary tools to optimise their input and skillset. Including supporting the recruitment of governance positions and/or project-based tasks.
4. Red flags and markers are identified and monitored so they can be actioned as required (before a club reaches a crisis point).
5. Greater collaboration and connection across the rugby ecosystem – including up-to-date knowledge of trends and ways of doing things to support decision-making with relevant guidelines, templates and resources.

*“We want to re-establish a family/community DNA as we did in the long gone past. To promote diverse engagement beyond rugby that caters for life needs of our families and community.”*

**Club Committee Member**



# CAPABILITY AND CAPACITY

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

## VOLUNTEERS

Volunteers have been and will continue to be the backbone of club rugby. However, pressures both internally and externally on clubs are resulting in it being harder to attract and retain volunteers across the motu. Key findings include:

- 62% of responding clubs indicated that they have enough volunteers, but it continues to be a struggle year-on-year.
- One-third of clubs expressed there is now an expectation that certain roles should be paid.
- The individual member survey highlighted that 28% of respondents encountered issues with volunteers being available to assist or run their teams.
- **Volunteer 'Give'** – While finding volunteers is becoming increasingly challenging, rugby clubs have an extremely devoted and loyal volunteer base which is why clubs are still in existence today.

Insights gained from volunteers indicated that those who have been club members for less than ten years 'give' on average 6 hours per week to club rugby, while a member of greater than 10 years provides an average of 10 hours of service per week.

Of note, of those responding, 21% were involved in a volunteer capacity with more than one club, and 47% indicated they were interested in helping the club more.

The interest from volunteers belies what clubs are indicating themselves, with difficulties filling positions and getting tasks completed. Assuming the volunteer interest is genuine, reasons for struggling to convert this to volunteer time could include merely not asking the membership, how people are being asked and through what channels, and how attractive the volunteering proposition is (i.e.

is it clear with a defined time contribution, support or development opportunities).

- **Volunteer Support**—Volunteers generally expressed that their role(s) were clearly defined (79%) and that they felt recognised and appreciated (75%).

However, 38% of volunteers signalled they **require more resources** and assistance to undertake their roles. Clubs shared this sentiment, with 86% of clubs wanting more resource capability, capacity, and assistance to support player, coach, and manager development.

- Volunteer management seems relatively fluid within clubs, with limited formal/structured support for volunteers:



**53%**  
OF CLUBS HAVE CLEAR  
ROLE DESCRIPTIONS



**51%**  
OF CLUBS ACTIVELY  
REWARD & CELEBRATE  
VOLUNTEERS



**62%**  
OF CLUBS DO NOT HAVE  
INDUCTION PACKS



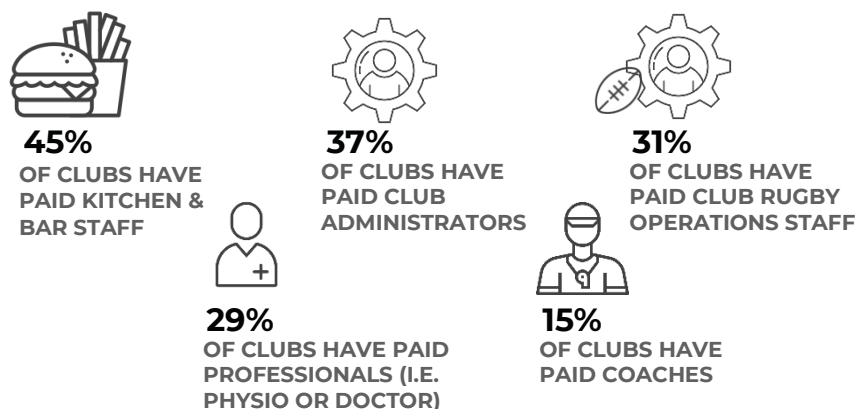
**36%**  
OF CLUBS DO NOT PROVIDE  
DEVELOPMENT OPPORTUNITIES



**43%**  
OF CLUBS HAVE VOLUNTEER  
SUCCESSION PLANS

## PAID STAFF

Clubs operate on a wide continuum from completely volunteer to more business-oriented operations, as is reflected in the Finance Section. While the majority of clubs are solely volunteer based, (including some Heartland provinces, which have no paid staff), a good proportion have some form of paid staff. The following infographics show the proportion of responding clubs that have paid staff across key club functions:



- There are a range of club employee roles and structures implemented across the club network along with a range of opinions on how well the roles work and the outcomes achieved.
- Historically clubs have established paid roles to meet their own needs or aspirations, with plenty of examples of both successful and unsuccessful outcomes. It is generally accepted that it is difficult to manage expectations at the grassroots sports level, and there are limited professional development opportunities and career pathways.
- Paid roles include General Manager, Operations Manager, Capability Manager, Director of Rugby, Rugby Development Officer, Administrator and positions associated with bar, kitchen and hospitality operations (as shown above). There is a mixture of part-time and full-time positions, and most off-field paid roles are more likely to be connected to larger participation clubs and/or those associated with more than one sport or offering. There is also a mix of employees

and contractors depending on what best suits the club and the individuals involved.

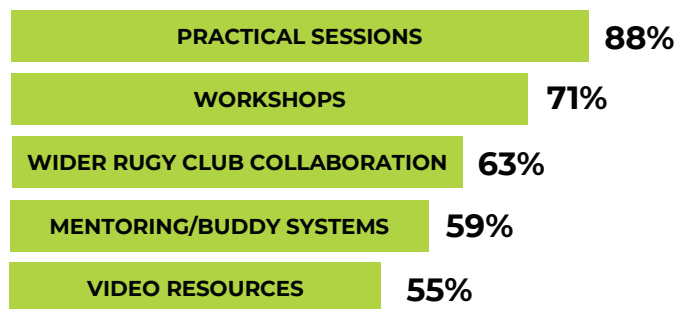
- The way these roles are managed and funded is reasonably diverse. They cover a continuum from employees managed by and accountable to club leadership and funded directly from club cashflow, through to positions funded and managed externally but with expectations of delivering club-based outcomes.
- There are also examples of clubs contracting out entire food and beverage operations, removing all licencing compliance requirements and benefitting from experienced operators and the knowledge they have to meet the needs of club patronage.
- More recently, several regional models have been introduced with more of a network and equity focus.
  - a. Clubs in Northland and Taranaki, for example, benefit from charitable trusts (set up independently of PUs), which fund paid roles with either a club capability or participation focus. The trust manages outcomes and expectations, lessening the chance of job description creep often experienced with roles funded and managed within clubs.
  - b. Auckland and Tasman have introduced models where capability roles have been established within the club network and the PU plays a strong role in driving outcomes. This is achieved through providing additional support and working closely as part of the relationship between external funders and the clubs.

## RESOURCES

Most resources used to develop players, coaches, and managers are created and deployed within the club environment. Conversations around the country expressed mixed levels of support for the way clubs develop their people. Insights from clubs and Provincial Unions include:

- 76% of clubs believe they are somewhat resourced, not well resourced or have no resourcing to develop their people effectively. This suggests support is required.

- **RugbySmart** was identified as being 'OK' for meeting club needs. It was considered relatively repetitive and could be refreshed and made more engaging on an annual basis.
- Numerous clubs expressed concerns about too much focus being placed on 'the game' and not on club capability. Other issues raised include a lack of trust and alignment with provincial unions, a lack of awareness and access to resources, and resources being out of date.
- For every comment highlighting how extensive New Zealand Rugby's '**Rugby Toolbox**' is, this was evenly matched by those who were unaware that it existed or had difficulties navigating the site.
- Provincial Unions and clubs rated human resources as the most impactful resource overall. Feedback received from clubs indicated that most value was extracted from Rugby Development Officers, while Provincial Unions rated Club Development Officers higher (although there was some variability between unions).
- Most clubs (86% of survey respondents and the majority of clubs attending Club Workshops) indicated they required more development resources. When pressed on which types of resources focus should be placed on, the following were highlighted:



This emphasises the desire for more face-to-face personalised development opportunities to complement online and course-related opportunities. Of notable variance was the elevated interest in mentor/buddy systems for rural-based clubs (up to 73%).

- The workshops further highlighted a desire for more informal coach development opportunities, for instance:

- Senior players coaching or shadow coaching junior training to assist with both personal development and junior-senior connections.
  - Availability of 'experts' to help with specialised training i.e. scrums.
  - Using Provincial Union Rugby Development Officers.
- More induction and ongoing support are required for managers to understand their roles.
  - The game benefits from a good pool of referees, so nurturing and promoting support and development opportunities is critical for the ongoing delivery of the game.
  - There was strong support for the coach pathway system, but in many cases, coaches are not looking to continue through the pathway - so alternate development opportunities need to be fostered to stimulate interest.
  - For junior coaches, the use of app material and notifications could be beneficial as a time saver and for generating new ideas. A similar approach has been used successfully by Netball New Zealand.

## WHAT'S NEEDED

Different responses to volunteering are required. This includes:

- 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, i.e. via registration forms.
- Establishing a compelling case to volunteer—creating an atmosphere (similar to an event-based feel and connection) and club unity.
- Exploring more personalised and informal engagement and development opportunities.
- Upskilling and professional development opportunities, particularly for club capability roles – this is evident across the wider sport and recreation sector.

## MARKETING & COMMUNICATIONS

A key area of interest for clubs is around marketing and communications. Clubs use a full range of marketing and communications channels to maximise reach. Clubs commented that most of this activity is assigned to a younger member to drive and deliver content.

Most desire for marketing support resided with urban clubs (75%) compared to rural-based clubs (44%). This stems from the respective settings and offerings – urban clubs need more cut-through to ‘compete’ with all the other activities on offer. The infographics below highlight the channels that are used by clubs:



**68%**

OF CLUBS HAVE AN UP-TO-DATE MEMBERSHIP DATABASE



**73%**

OF CLUBS HAVE A WEBSITE



**93%**

OF CLUBS USE SOCIAL MEDIA PLATFORMS

Some key findings include:

- There is no overarching marketing campaign for community rugby. Most activity focuses on professional rugby, with limited or no material promoting grassroots rugby. There needs to be clear promotion and branding of why you should be involved – the ‘mateship’ created, fun, whanau connection/the generations before us, our nation’s game, the different ways of playing the game, a game for everyone.

Greater clarity is required on the roles and responsibilities for promoting different levels of the game—there appears to be timidity at the club level around what can be said and done. Strong direction and leadership are required.

- Content production and implementation are primarily left to younger club members, who utilise their expertise and connections. This side of club operations is typically more at arm’s length from committees/boards (unless there is younger or social media-skilled representation) — most committees/boards have very limited understanding of what is happening in this space.

- Various social media channels are used to reach different audiences. Video content is the most popular and shared material. Facebook and Instagram are currently used extensively for more creative content, i.e., game highlights, with some clubs moving into TikTok. This content may best connect with school-aged players to attract them to the club environment, highlighting the experience and ‘mateship’ that is created.
- Members prefer for information to be communicated via email and Facebook, which represents the primary age cohort of members, with parents being the gatekeepers for junior members.
- The ability to use prominent representative players to help promote club activity is now limited. These players remain the shop window for rugby across the country, and their pull should be harnessed where possible. This could include connecting professional-level rugby with grassroots by sharing their ‘rugby journey’ and club experiences.



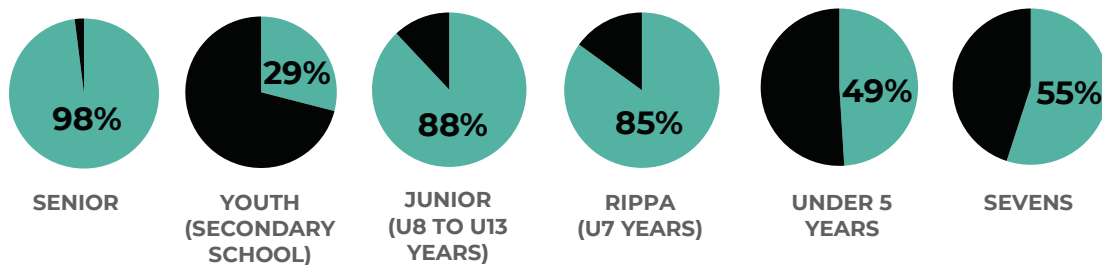
# EXPERIENCE AND OFFERINGS

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 with and connect with the club environment.

## WHAT WE PLAY

The following graphic shows the proportion of clubs that offer different grades of rugby (sourced from club surveys). The following can be concluded:

- Most clubs field a senior team (part of their identity).
- Due to reduced population bases, rural clubs have a notably lower proportion of teams below senior rugby grades when compared to more urban-based clubs. Small clubs (regardless of geographic setting) are also more likely to have a senior team and fewer other grade offerings.
- The core playing offerings are across senior, junior and rippa grades, with far lower engagement in Under 5 and in Sevens.



Other notable insights gained on rugby delivery include:

- **From Non-Contact to Contact Rugby:** Non-contact versions of the game have good 'cut through' with a high member base. However, there are inherent concerns surrounding contact when players reach

Under 8's at which point overall membership declines. Data extrapolated since 2018 shows that, on average, only 69% of 6-year-old players (rippa) return to junior-level rugby the following season. This decline is further evident after one full season of contact rugby, with an additional 22% decline.



There is also a strong traditional viewpoint within some in the club community that contact rugby is the true form of the game and natural attrition is part of the system. Effectively "weeding out" those players and families who are not committed to the sport or "capable of reaching higher representative honours".

While non-contact versions of the game remain as an option to run in parallel alongside contact rugby, many clubs also cited they perceived this was not a practical option for them. There are concerns this approach would dilute the player pool further resulting in additional strain on fielding contact teams (as the critical mass of players is not there). Other concerns included not having sufficient resource capacity to deliver additional team/grade options and wanting to coach players on how to tackle as early as possible to avoid injury (injury prevention mechanism). Some club members also pointed to touch as a non-contact option which is already available.

- **Injuries:** In addition to head injury concerns, which are perceived as a primary driver for the drop-off after rippa and at senior level, workers are now more aware than ever of being incapacitated due to injuries. As ACC only covers 80% of weekly income if players are unable to perform their usual work activity, this has become more impactful with the current cost-of-living crisis. Some players have mentioned they need to weigh up 'whether they can afford to play' because of the potential financial risks.

- **Women and Girls Rugby:** most clubs were extremely supportive of promoting women's and girls' rugby. While supportive, a number of constraints were perceived to exist by clubs which prevented them from either establishing or growing the game. These included:
  - a. Infrastructure does not support women and girls use (see Facility Section).
  - b. It requires additional human and facility resources (e.g., match scheduling on different days results in more volunteers and resources being required).
  - c. Requires compromising existing changing room access - potentially reducing the experience of others.
  - d. Establishing women's and girls' teams will likely mean destabilising other club teams in the local network due to there being a limited pool of players.
  - e. Not feeling adequately supported in facilitating the women's and girls' game – "clubs left to their own device".

To overcome some of these perceived issues, clubs and provincial unions have embarked on a range of initiatives and approaches which include:

- a. Centralising games to one park with suitable infrastructure and facilitating connections across teams — creating more of a festival/event approach.
  - b. Having dedicated infrastructure or making facilities more gender-neutral.
  - c. Establishing specific coordination roles and representation at the committee/board level.
  - d. Provincial level human resources to support clubs and the overall delivery of the game.
- **Other Activity:** Summer-related activities (e.g., touch and tag modules) are becoming more popular with clubs (although Touch NZ has indicated that club module delivery has declined significantly over the last two decades). Approximately 44% of clubs indicated they have been using touch or tag modules in summer, while around a third of responding members were interested in touch/tag being introduced or expanded.

It is initiatives such as this that can keep junior players associated with club activity (even if they are no longer playing rugby during winter).

There are also opportunities for connecting via databases and social media channels.

Incorporating more sports codes (either via partnerships or directly as part of the club) has also facilitated wider engagement and connection. The development of numerous facility hubs has also been the catalyst for greater cross-code connection.

## RESPONDING TO DECLINING PLAYER NUMBERS

In response to challenges clubs are encountering with fielding teams, alternate approaches are being adopted to enable games to be played.

- The most prominent being 'Game On' which 81% of clubs cited they used. Essentially, the initiative encourages games to be played without defaulting due to having less than 15 players or not having front rowers.
- Combined teams across clubs and schools have also been trialled and implemented in certain areas of the country. There are polarising opinions on this concept. On one hand, supporters express their desire to do what it takes so players can get on the field and enjoy the game, while detractors point to a loss of club identity and connection (players are effectively seen as nomads).
- Members cited frustration with declining numbers and being unable to field teams. In response, one in three indicated they would be interested in more combined teams.
- Many clubs and PUs are actively targeting other areas in the country where they are short on players in certain positions, while some are scouting players from overseas. It is the combination of declining members and the need to attract new players which is driving the 'arms race' for players that are available. Coaches are seen as pivotal in successfully recruiting and maintaining players – many players follow the coach (and available incentives) as opposed to being loyal to a club (as has traditionally been the case).

It is universally recognised that this is not an optimal state. However, it is a direct response to the desire to have a winning premier team against the backdrop of declining senior membership. Most respondents would prefer to break the current cycle and reduce the drop-off without needing to resort to the approaches above and financial inducement.

- Clubs indicated that their **primary focus** was on the issue of not being able to field or maintain colts and senior teams (particularly for premier teams). In contrast, clubs are less concerned with the size of their junior membership base.



## WHEN WE TRAIN AND PLAY

### GAMES

The use of floodlights for games is becoming more prevalent and strongly desired across many rugby communities. Clubs responding to the survey indicated that more matches under lights were the second highest initiative cited by clubs to meet evolving player needs (53% of clubs).

Moving to more midweek games under lights was cited by members and provincial unions as the number one initiative they would like to see introduced or expanded. The by-products of this approach include 'freeing up' weekends, accessing fields and clubroom facilities at typical off-peak times (i.e. Friday evenings) – which can help support new revenue potential, attract and retain players (as there is less conflict with other field sports), and providing opportunities for adults/parents to play and/or volunteer in the weekend if their children play during the week.

This approach has been more evident in urban areas where there are field pressures and other conflicting challenges. In response to these same challenges, other codes, such as football and rugby league, have been early adopters of midweek games.

However, there are various challenges cited regarding floodlit games:

- Current infrastructure (floodlighting and ground specification) is not always suitable for delivering games (as fields are primarily set for training purposes).
- Cost of installation and ongoing costs (who is responsible for costs varies from ground-to-ground and across Councils).
- Midweek games can be challenging in rural/isolated areas due to travel times (evening game + travel + potentially work or school the following morning). Concerns were also raised regarding senior games and farming commitments the following morning.
- Potential loss of bar revenue if games are held midweek.
- Too cold playing junior games at night in the middle of winter across some parts of the country.

While there are inherent risks, there was strong sentiment from clubs that introducing or adding more midweek games should be trialled. This will

require consideration of timing (both time of day and time of season), the make-up of competition scheduling (adopting a flexible approach to best reflect weather conditions and when nights become longer), travel commitments from clubs and a determination of infrastructure requirements (not all grounds need to have game level floodlighting). Engagement with players/parents and clubs will be paramount with such approaches.



**53%**  
OF CLUBS HAVE MOVED  
TO MORE MATCHES  
UNDER LIGHTS



**46%**  
OF MEMBERS INDICATED  
THEY WOULD LIKE MORE  
MATCHES UNDER LIGHTS

**Scheduling:** Although out-of-scope for this project, many clubs felt that the club rugby calendar was too dictated by semi-professional and professional competitions. Consequently, games can be played in sub-optimal conditions (associated with seasonal weather patterns), and training has to start during summer.

### TRAINING

Clubs and members alike expressed less desire to change training days/times and/or reduce frequency and length. However, training schedules are inherently driven by the typical weekend game. Therefore, should more midweek games be introduced, training schedules will need to change accordingly.

## SOCIAL ENVIRONMENT

The social environment is seen as important as the on-field experience. Clubs presented unique and wide-ranging club offerings. Some of these included:



**SUPPORTER  
MEMBERSHIP**



**OTHER  
SPORTS**



**FITNESS  
PROGRAMMES**



**ACTIVITIES TO  
ENCOURAGE  
LONGER STAYS**



**KAI IS  
CENTRAL**

One of the main initiatives that was regularly mentioned was the use of kai as being central to club engagement and connectivity. Key features of this approach included:

1. Consideration is given to who prepared the food and cleaned up (i.e. teams on rotation – creating a sense of ownership and belonging).
2. Creating a strong connection between junior and senior sections of the club.
3. Opportunity to instil club culture and values.
4. Connection with the wider community (this was evidenced by some clubs opening their doors to the community—particularly in lower socio-economic areas). This was recognised as a highlight of the week and, for many, their first full meal of the week. This approach displays and re-emphasises a club’s value within the community.
5. Being recognised by opposing teams as a key rugby destination and a place they look forward to visiting.
6. Creating a safe and inclusive space.

## DELIVERING POSITIVE EXPERIENCES

- Overall, members were very satisfied with their club experiences. Ratings for all but one experience metric were over 80%.
- A more moderate rating was given to the ability to balance the focus across all grades.

*“The club only cares about one team, their Prems. No attempts are made to include juniors in the club as a whole.”*

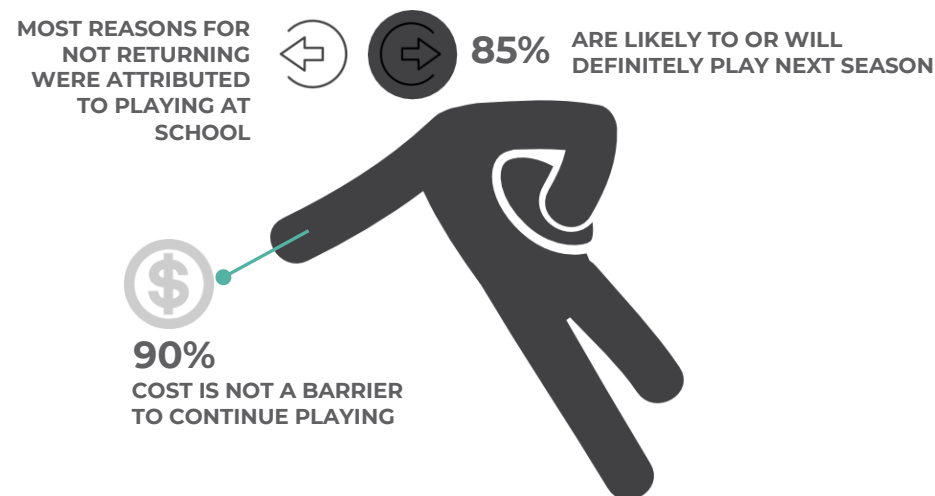
**Club Member**

- Clubs themselves were relatively confident in their ability to deliver positive experiences to juniors, seniors, families and social teams. But had lower confidence in delivering positive experiences to women and girls, Māori communities and Pasifika communities.
- This club self-assessment was reflected (although less pronounced) through member responses, with females, Māori and Pasifika members expressing slightly lower satisfaction.

- While reasons for dissatisfaction varied, some of the more predominant reasons include:
  1. Too much focus is being placed on senior/premier grades.
  2. Lack of players, difficulty arranging games and the season length being too short.
  3. Age-stage appropriateness (in relation to rules and team composition).
  4. No or lack of women’s team/focus.

## RETURN RATE

Results from the member survey present similar insights to Sport New Zealand’s Voice of the Participant findings, with a high likelihood of players returning the following season and a relatively high net promoter score. The metrics indicate that the overall experience is quite positive, although challenges exist.

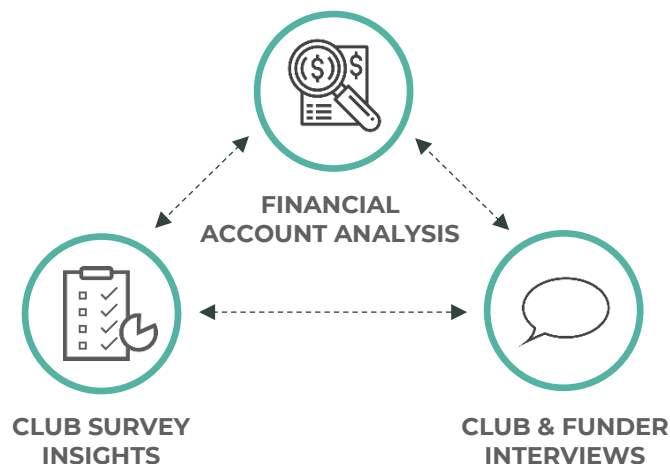


*“I love my club. Will be here for ever.”*

**Club Member**

# FINANCE

A triangulated approach was undertaken to gain a full understanding of the financial health of rugby clubs. This included:



## FINANCIAL ACCOUNT ANALYSIS

### FINANCIAL ANALYSIS APPROACH

A statistical sample of 111 rugby club financial accounts were examined (accounting for around 20% of clubs nationwide). The approach involved:

- Analysis of FY22 accounts, with FY21 accounts used for comparisons to identify material variations between periods.
- A similar approach was used to ascertain any significant changes before and after the COVID-19-impacted periods (using FY18 and FY19 accounts).
- Income from FY12 was also reviewed for the purposes of establishing whether the financial make-up and health of clubs have changed materially over the past decade.

- For the purposes of the analysis, clubs were categorised under Urban 1, Urban 2 and Rural settings (as outlined earlier), and further refined by Large, Medium and Small (under each category) based on player numbers.

### DATA LIMITATIONS AND CHALLENGES

There are several factors that have made drawing definitive conclusions challenging:

- A reliance on publicly available information reviewed through a desktop analysis that did not enable a detailed look 'behind the numbers' to confirm the interpretation of certain line items.
- No standardised reporting due to clubs being autonomous entities that determine the financial reporting that meets their specific needs. The level of detail varies which requires:
  - a. Where only very aggregated information is provided, categorising the allocation of revenue and costs was difficult.
  - b. Where very detailed information is provided, judgement has been made on how to aggregate data into relevant higher-order categories.
- There is a large variance between clubs within the identified categories, which can reduce the levels of confidence.
- In the case of rural clubs, livestock trading makes a significant contribution. To minimise distortions to total revenue where 'other' revenue involves discrete trading activity, net contribution has been used for analysis purposes.
- The source of, or basis for, revenue components is generally not disclosed, which makes it difficult to determine the extent to which revenue is at risk (i.e. less stable sponsorship, donations and grants are sometimes difficult to isolate).
- Where accounts included multisport or other activity, judgement has been required to isolate the relevant information to rugby alone (where possible). For most costs and from a balance sheet perspective that differentiation was not possible.

Information and insights gained from the club survey and club and funder interviews were overlaid to balance out some of these limitations.

## REVENUE ANALYSIS

The breakdown and spread of revenue (across Urban and Rural settings) are shown in the accompanying figures. The key findings are:

- The composition of revenue at an individual club level varies significantly (regardless of membership size and geographic setting).
- Of the subset of clubs sampled, the proportion of revenue tended to not vary over time, but the values by revenue category varied considerably.
- Player subscriptions represent a small proportion of total revenue (averaging around 8%). In many instances, clubs cited difficulties collecting subscriptions, with some deciding not to follow up or collect subscriptions at all.
- There is minimal direct linkage between player numbers and a club's financial health. However, a strong indirect relationship between player numbers and other revenue sources such as grants, sponsorship, and in-kind contributions is expected.
- Third-party revenue accounts for 42% of total income – sourced from donations, grants and sponsorship. Sponsorship revenue remains strong across most clubs (18% of turnover). Regardless of whether sponsorship plans and proposals are formalised, clubs generally connect well with their local communities to tap into revenue opportunities.

### Grant Funding

- While some grant funding is attributed to one-off activities (i.e. asset refurbishment and replacement), there is a strong reliance on grant funding by a vast majority of clubs. Around 62% of clubs who responded to the survey indicated they are reliant on grant funding to stay afloat.

Note clubs that sourced substantial grant funds in FY12 recorded a high proportionate level of funds in FY22.

- Third-party funder interviews indicated rugby receives a high proportion of funding support to clubs, and this was likely to continue. However, this is against a backdrop of a diminishing funding pool which will impact future funding levels.
- Some funders and clubs indicated there is a declining number of Class 4 gaming venues in rural settings, which could impact distribution into those communities in the future.

FIGURE 4 – AVERAGE CLUB REVENUE BREAKDOWN - 2022 (SAMPLE OF 111 CLUBS)

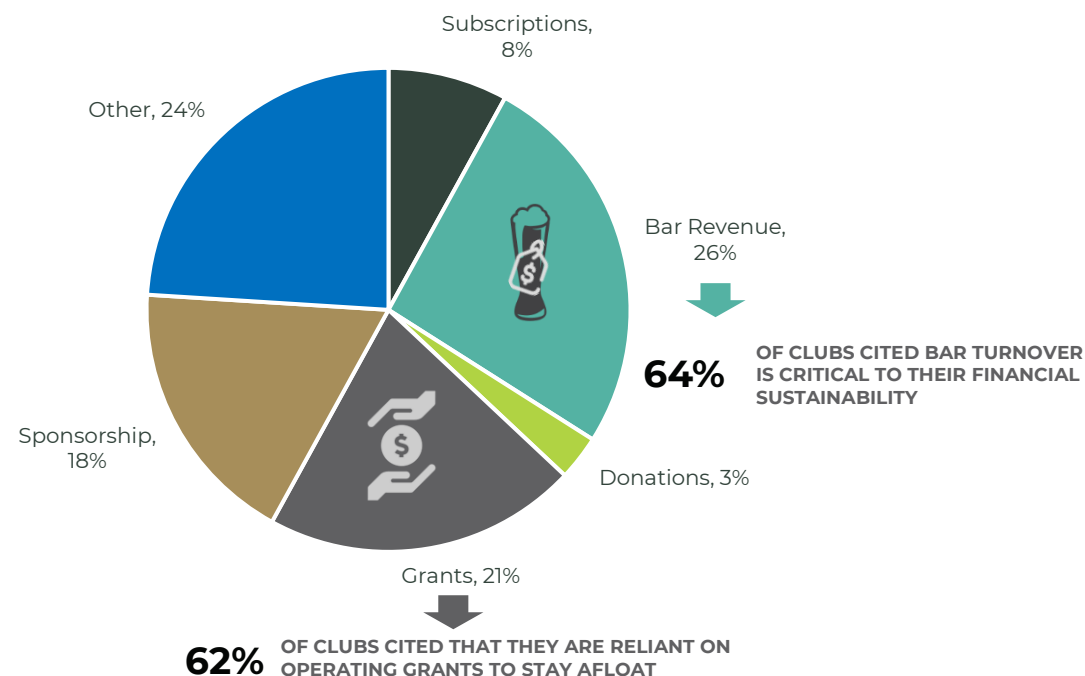
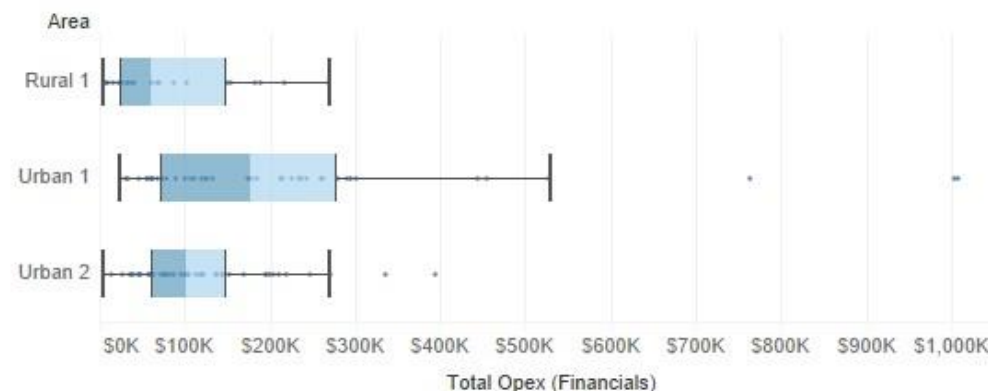


FIGURE 5 – REVENUE BREAKDOWN BY GEOGRAPHIC SETTING (SAMPLE OF 111 CLUBS)



In some higher deprivation and in more rural areas, funding cannot currently be expended by granting entities, which presents opportunities for some clubs. While in urban areas, funders are inundated with applications which can restrict or limit distribution into clubs.

- As the funding environment becomes more constrained, funders are taking a more strategic approach to where funds are best directed. Consequently, large funding streams (primarily for capital developments) are focusing on multisport and hub developments to maximise investment value. Other target areas include low participation communities, smaller grants for enabling participation (i.e. team gear), but less investment into wages and business-as-usual activity.

### Bar Revenue

- Bar revenue is an important source of revenue for most clubs (the single highest proportion of revenue from the statistical sample at 26%). Noting some clubs derive no revenue from bar takings.
- Most clubs signalled there is a strong reliance on bar revenue to remain financially sustainable. Around 64% of club survey respondents.
- A number of clubs emphasised that bar revenue is a key driver for determining when games are scheduled. Therefore, for many clubs there is a preference to not hold midweek games due to the financial impact of potentially losing bar revenue in the weekend – especially if this could not be offset with other income.
- Gross bar revenue increased slightly in nominal terms in the 10-year period between 2012 and 2022.
- Analysis undertaken shows 11 clubs with bar revenue in FY12 recorded no bar revenue in FY22, while a further 8 clubs showed no bar revenue in either financial year.
- A watching brief is required on potential legislation impact around alcohol sponsorship and the effect this may have on sponsorship and/or sale margins.

“Clubs remain a cornerstone of the community – particularly in rural communities. It is a generational thing and are a main part of the region’s psyche.”

Funder

FIGURE 6 – BAR REVENUE ANALYSIS FOR 2012 AND 2022

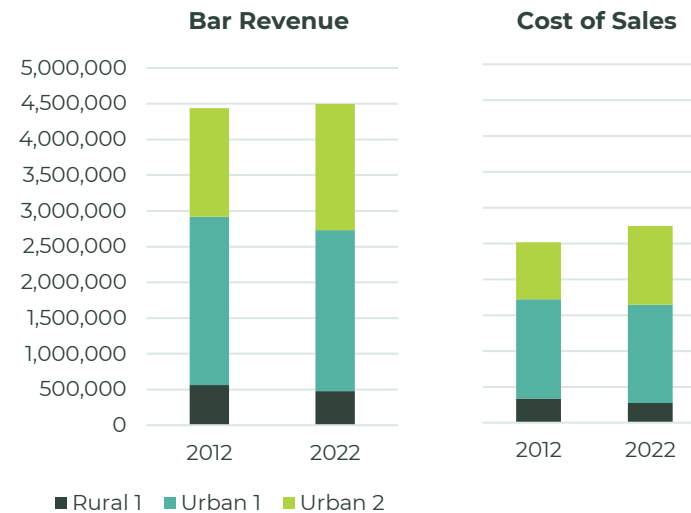
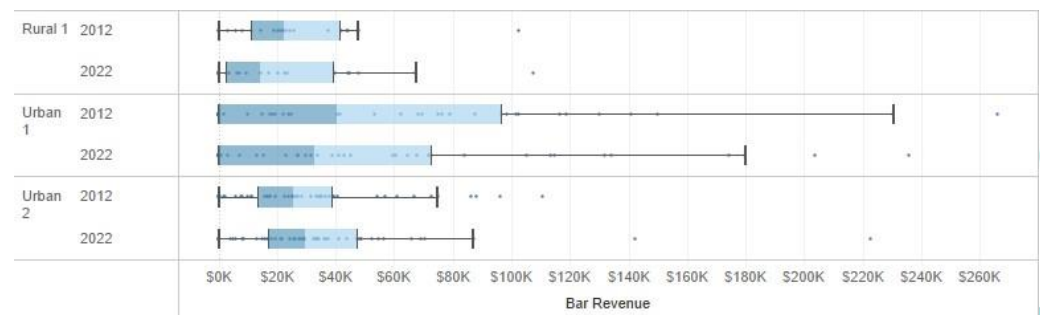


FIGURE 7 – BAR REVENUE BY GEOGRAPHIC SETTING FOR 2012 AND 2022



## COST ANALYSIS

Cost analysis was undertaken on the major expense categories, with more granular analysis of property and people costs (accounting for 59% of costs).

- Player/team expenses represent the highest proportion of people costs at 71%. While specific line items cannot be identified, concerns have been raised about an imbalance of resources being allocated to senior and premier players/teams.
- Conversely, salaries and wages only account for a small proportion of overall costs (9%).
- Property costs are significant for clubs, with most attributed to building maintenance. These costs vary between periods given the unpredictable nature of certain components of that spend. Examples are evident where clubs have undertaken specific revenue-raising initiatives to fund major asset refurbishment, renewals or developments. From an account's perspective, this can see revenue raised in one financial year in advance of major expenditure in the following years.
- The financial analysis is unable to account for 'in-kind' costs where services and/or materials/projects are provided by members or sponsors, or where employment or accommodation to players is provided through third parties as part of player recruitment and retention (this has been evidenced under many guises).
- Many clubs cited the continued importance of skilled volunteer resources to remove costs or provide materials/services at or below market cost. Rugby clubs have operated this way for generations and are reliant on this to remain afloat. Numerous clubs commented that volunteer labour is becoming harder to attract and they are now having to pay close to or market rate for repairs and maintenance work around the club.
- Club committee/Board members are concerned with the continued rate of increase in costs associated with utilities and insurance. They cite this diverts funds away from key club focus areas, especially for delivering quality experiences (both on and off-field).

FIGURE 8 – AVERAGE CLUB COST BREAKDOWN – 2022 (SAMPLE OF 111 CLUBS)

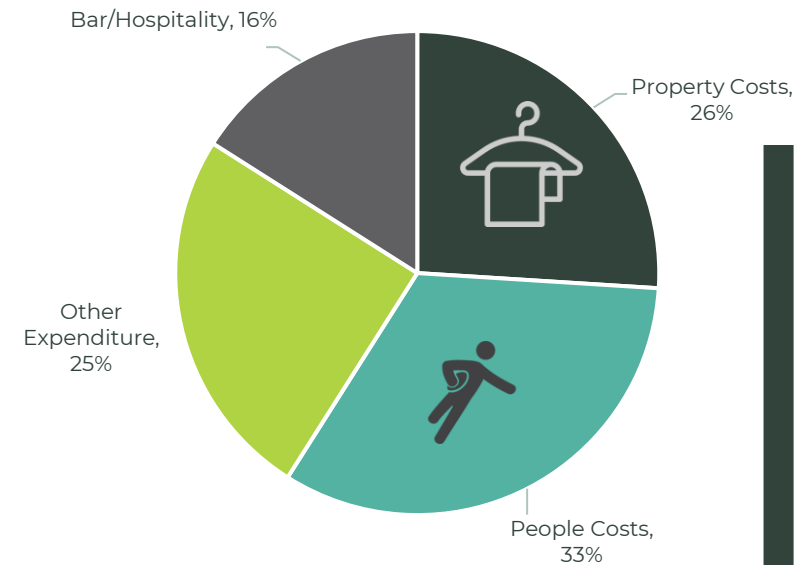


FIGURE 9 – PEOPLE COSTS

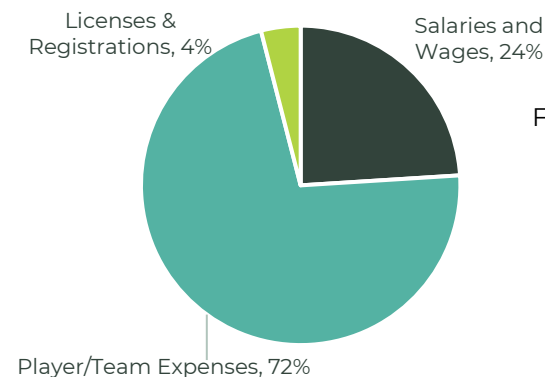
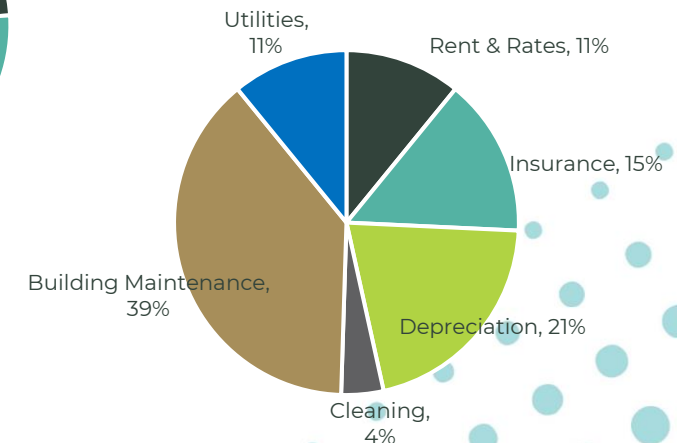


FIGURE 10 – PROPERTY COSTS



## BALANCE SHEET ANALYSIS

Club balance sheets are relatively uncomplicated.

- There is a significant correlation between total and net assets, with most clubs carrying minimal current liabilities at financial year end and few (14 of 111 clubs carrying any debt). Half of those in debt were over \$10,000, with one club holding 80% of all debt identified in the sample.
- Property, plant, and equipment is the most significant balance sheet item at just under 70%. However, this distorts clubs' financial capacity given the nature of the assets and their location. As most capital assets are located on Council-owned land under a ground lease and invariably are unable to be relocated, they may not have any tangible monetary value.
- Most clubs have reasonable cash balances whether expressed in dollar terms or as a percentage of annual operating costs.
- Most clubs recorded nil investments, but a small banding of clubs had investments in the tens of thousands and another small banding of clubs over \$50,000+ (including two over \$1 million).
- There is an interplay between cash balances and investments with some clubs recording term deposits as cash and others including these as investments. However, the low level of indebtedness, and relatively high levels of cash/investments held, suggest that near term financial resilience is reasonably high for most of the clubs sampled.
- Balance sheet information provides no insight into the value of clubs' intangible assets. Specifically, there is no value attributed to clubs' present and past membership or the goodwill enjoyed within the wider local communities. As previously outlined, these intangible assets will be of significant value both as a source of in-kind contributions and an enabler to access revenue from sources such as sponsorship, donations and grants.

## KEY POINTS

1. The quality of financial statements and the relative financial strength of most clubs indicate that there is a reasonable level of competent financial stewardship being exercised.
2. On average, clubs are generally performing better than breakeven – particularly once one-off expenditure is adjusted for. However, there is a reliance on grant funding, which could impact financial sustainability should levels be reduced.
3. Clubs are not-for-profit entities but rather exist to serve the interests of their members. Generally, clubs appear able to generate sufficient revenue from a variety of sources to cover operating costs and build up a level of liquid reserves. On the assumption that clubs are not looking to maximise revenue currently, it is hard to assess how successful clubs would be if they needed to find replacement revenue and/or if large asset expenditure is pending.

It has been noted that some rural areas are able to attract a variety of unique funding streams as required to make 'ends meet' (i.e. taking a team to undertake tailing at a local farm).

When large capital development projects are being explored, funding levels typically stretch beyond the capacity of most rugby clubs. As the funding climate is constrained, funders favour multi-use approaches to drive wider outcomes. This can result in changing structures and operations for clubs, which may require a change in mindset and approach to drive positive outcomes.

4. An unquantifiable factor is how important current and past members are to revenue generation. While subscriptions are a small part of total revenue, it is expected that past members and their associates are an important source of revenue whether by way of sponsorship, one-off donations, other in-kind contributions and/or social expenditure. Therefore, whether that membership base is being replenished or diminishing is a key consideration for the long-term financial viability of a club.
5. Ultimately, a club's long-term financial viability is linked to its membership and supporter base. The complicated question is what drives this over time. The approach needs to reflect the attractiveness of the club environment and rugby as a game. This will require a careful balance of initiatives and coordination between clubs, Provincial Unions, and New Zealand Rugby.



# 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 earlier in ‘Experience and Offerings’.

## CREATING POSITIVE ENVIRONMENTS

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



**KAI IS CENTRAL TO BRINGING PEOPLE TOGETHER**



**UNDERSTANDING & REFLECTING COMMUNITIES**



**STRONG CONNECTION BETWEEN JUNIORS & SENIORS**



**ALL GRADES ARE SEEN AS EQUAL WITH NO HIERARCHY**



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

## DIVERSITY

- Clubs have a lower view of their ability to deliver positive experiences to members with diverse cultural backgrounds – this is more pronounced with small clubs. Subsequently, 80% of clubs would appreciate support and insight on how to encourage and value cultural diversity. Already around half of clubs engage cultural advisors or communities to support them.

More specifically, 76% of clubs indicated they would appreciate support to learn more about Te Tiriti o Waitangi and Kaupapa Māori.

- Clubs in an urban setting are more interested in this support than rurally-based clubs – with rural clubs citing more interest in general cultural diversity support than specifically in Kaupapa Māori.
- **Examples:** Some clubs showcased examples of hosting annual cultural days, which are led by members and have a wide-ranging positive impact and foster a sense of inclusion. Other clubs have ensured they have diverse representation on their committee or advisors to support effective decision-making.
- Direct comparisons were made to rugby league clubs which typically have strong whanau connections which embrace and reflect the composition of their membership – creating a sense of belonging and inclusiveness.
- Being able to create a safe and welcoming environment for the LGBTTQIA+ community was rated lower by clubs, with far less desire to learn about this community relative to other diverse communities.

This is reflective of member views on how well clubs provide an inclusive environment for the LGBTTQIA+ community, which was perceived as being well below average.

## WOMEN AND GIRLS

Clubs generally rate their ability to promote, recruit and support females across all facets of the clubs as ‘ok’ to ‘well’. Urban clubs have a slightly lower perception of how well they are doing.

While the overall ratings are relatively positive, and pockets of the community are proactive and have good inclusiveness, this is not widespread across the wider club environment. Many comments still reflected an ‘old boys club’ mentality (real or in jest), an under-representation on committees/Boards and an old-school approach to where involvement was best placed (i.e. treasurer, secretary and kitchen roles). Various female members commented on limited opportunities to develop, a feeling of not being heard and ‘tokenism’ appointments.

While the landscape appears to be changing, more support and understanding of the associated benefits are required for full integration within the club setting.



## CHILDREN

Clubs provided the following responses to child safety:

- 61% of clubs do not have a child protection or safe kids policy.
- 49% are not aware of New Zealand Rugby's 'Safe Clubs Safe Kids Child Protection Programme.
- 72% do not have a safe kids advisor.

While clubs acknowledge it as an area that needs to be addressed, there is a level of trepidation around its implementation (e.g., undertaking police vetting). There is a low level of compliance for child and general member protection (see Compliance Section) - this area of compliance received the highest level of requested support from clubs.

Extensive resources already exist for child protection. It is, therefore, awareness and practical support that is required to formally establish safe practices within the club setting.

*“There is nothing more important than the safety of your members, so it must be prioritised with appropriate safeguarding.”*

**National Sports Organisation**

## SOCIAL ENVIRONMENT

The following insights were gained about alcohol within the club setting:

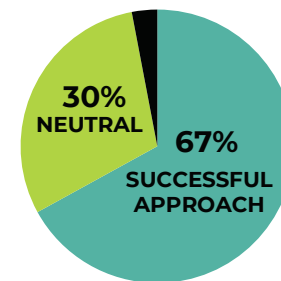
- 53% of clubs believe that alcohol is integral for social connectivity at the club. Members have a slightly lower view of its social role (with 42% indicating it is integral), but 64% believe it is a must-have offering in the clubroom.
- This sentiment is reiterated by clubs, with 52% believing a high number of members would leave if they didn't have a bar.
- 60% of clubs indicate that legislation changes have resulted in reduced alcohol consumption and sales over the last 10 years.

- Club activity is largely perceived to not be negatively impacted by alcohol, with only 5-10% of clubs indicating issues are being experienced. This view was shared by members with only 8% believing alcohol is causing anti-social behaviour in the club setting (23% held a neutral view).
- Around 2 in every 3 clubs reported having alcohol strategies in place.
- Most clubs understand their responsibilities under their liquor license and are complying to maintain this. Many cite police activity around large games to ensure safe environments are maintained. Some clubs also report offering shuttle services to safely transport patrons.

*“We need to be more aware of the well-being of our members. Statistically we have a number of young people (men in particular) who are of the age where they need to know they can talk to us/ each other. I would see this is one of our highest priorities and responsibilities as a club and should be as a union.”*

**Club Committee Member**

### RATING THE SUCCESS OF BUILDING A SAFE & POSITIVE CLUB ENVIRONMENT



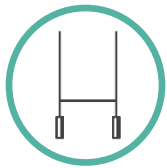
**CLUB VIEW**



- Female members were more satisfied.
- Māori and Pasifika were slightly less satisfied.



- Slightly lower satisfaction for female, Māori and Pasifika members



# FACILITIES

## PLAYING FIELDS

Key insights from survey, interview and club workshops include:

- Most grounds are owned by Councils, which was seen as being both positive and negative in equal proportions. The main issues expressed included limited autonomy with ground closures, which has become more prevalent with wetter weather.

Varying levels of service are evident across the country and within some territorial authorities, leading to some sub-standard grounds and potential inequity.

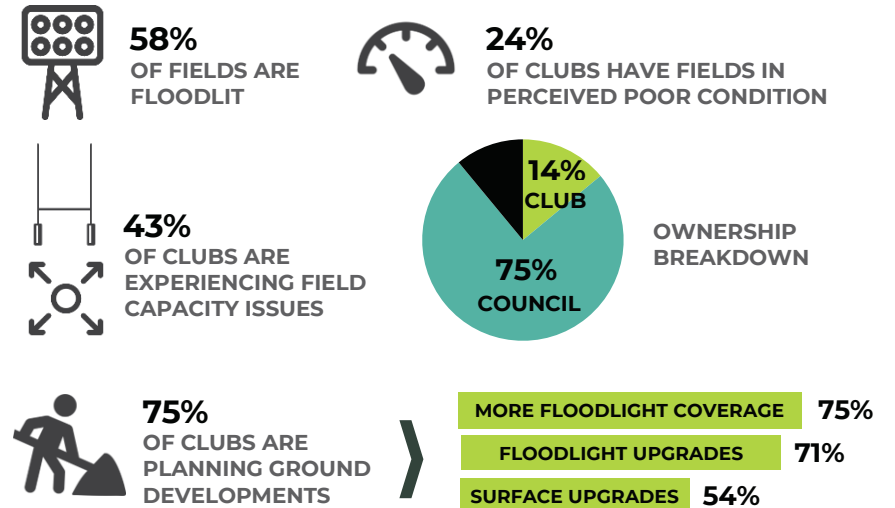
- Around 1 in 4 clubs have fields in poor perceived condition which can limit and impact training and games.
- 58% of fields have some form of floodlighting – typically to a lux level for training only. As there is a strong desire for more games under lights (see Experience and Offerings Section), infrastructure investment is required to achieve this. Members also highlighted that floodlight quality is average (which was one of the lowest-rated attributes of all club facilities).

It should be noted that ground suitability should also be considered before upgrading or installing floodlights. Any lighting investment should be placed to unlock optimal use hours (which the grounds are designed to accommodate).

- When considering the above, it can lead to capacity constraints as the grounds cannot accommodate the level of demand they receive. Approximately, 43% of clubs indicated they are experiencing capacity issues.
- Various clubs that own their grounds have signalled financial and people resource constraints when running day-to-day club operations, as well as when undertaking ground and facility works. While they have capital assets, many are finding this is overburdening them operationally.

- 3 in 4 clubs have planned ground developments, with most centred around floodlighting – increasing field coverage and upgrading to LED lights.

Both the Auckland and Waikato Rugby Unions have undertaken data-led approaches for informing Councils and other key funders on what is required (identified key ground priorities), when and what value this will provide the sports field network for future investment.



## CLUBROOMS & CHANGING ROOMS

Key insights from survey, interview and club workshops include:

- **Ownership:** Clubs are the primary owners of clubrooms (62%), and a higher proportion are also assigned the responsibility of maintaining the facilities (76%)—even if they do not own them.
- **Age and Condition:** 1 in 4 clubrooms/changing rooms are older than 70 years old.

Due to their age and functionality, there are ongoing and imminent condition concerns, and their ability to meet evolving needs is often limited. Rural and small clubs rated their facility condition lower relative to more urban and medium-to-large clubs. Around half of clubs (owning clubrooms) have undertaken large renovations in the last twenty years.

This was particularly evident with changing rooms within the clubroom building, with 34% of clubs indicating they are not suitable for women and girls, while a further 32% deemed them just 'usable'. The level of unsuitability was higher for standalone changing rooms (41%), which are mainly under Council ownership and maintenance.

These concerns are widely shared by members with 25% stating they are unsuitable for female use, while a further 19% stated they were just 'usable'.

- Many clubs expressed financial and resource issues with maintaining and undertaking renewals on the building. While most clubs are still reliant on internal tradies and skilled professionals, clubs indicated this was becoming more difficult than it was 20 years ago.
- **Use:** More urban-based clubs are optimising their spaces as venues-for-hire to diversify their income streams and create more community connections. Most clubs outlined there was notable available capacity and are open to wider use of their facilities.

The core spaces within clubrooms can be promoted for wider community use (subject to aesthetics, functionality and cost of access). Clubs provided an overview of their clubrooms:



- Currently around half of rugby clubs are associated with some form of multisport arrangement (either via a wider trust, through the club operating multiple codes and/or the club having partnerships with other codes). This trend is likely to continue, particularly when factoring in the age and condition of both clubrooms and changing rooms, in conjunction with the current funding environment.

With limited funds available, key capital funders are investing where they can gain maximum value in the community. Most have stated their primary focus is on multisport/hub developments. Therefore, upcoming large rugby renewals or development projects will likely require a wide-ranging discussion on potential partners.

- Clubrooms are entrenched in history, identity, and pride, which needs to be carefully considered moving forward (this may require rugby clubs to adopt different, more creative, or flexible approaches than in the past). In many previous multisport examples, concerns regarding 'loss of identity' have stymied proposed partnership developments, and rugby clubs have missed out on opportunities.

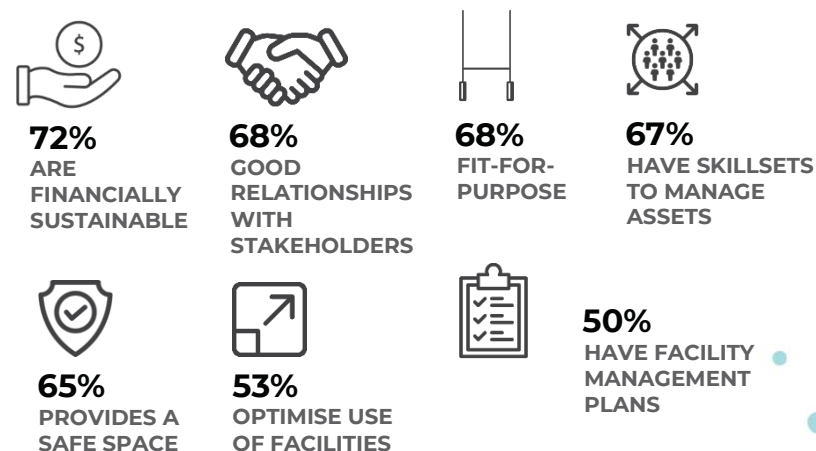
- **Needs and Developments:** Clubs and members agree that most clubrooms and changing rooms are meeting their needs (62% and a further 31% stating they are somewhat meeting needs). Only 15% of members believe that their clubrooms and changing rooms are detracting from retaining and recruiting members.

While the facilities are usable and not necessarily a deterrent, they can impact the overall quality of experience. In response to this, 67% of clubs responding to the survey indicated they have a development either proposed or planned.

Clubs and members have contrasting opinions on priorities. Overall, clubs are seeking to prioritise addressing clubroom condition issues, while members would like to prioritise the quality and number of changing rooms.

## OVERALL VIEW

Overall, clubs are generally positive about the facilities and how they operate them. But as the following club insights demonstrate, notable opportunities exist to improve how facilities are owned, managed and delivered to provide quality experiences. The following relate to club facilities:



## KEY POINTS

1. Clubs need good quality field lighting to enable change and to remain a relevant option for participants.
2. There is a strong need for changing room upgrades to be fit-for-purpose and all-inclusive.
3. Aging assets with increasing condition issues will require pivotal decision-making for clubs. Clubs will need to decide 'where to from here' in a more constrained funding environment.
4. Clubrooms are becoming more problematic to manage due to the cost of repairs, maintenance, and renewals, as well as the escalation of items such as insurance.
5. Many clubs maintain a traditional approach to sports delivery (e.g., a single clubroom for rugby), which contrasts with the community hub/multisport direction desired by key stakeholders and funders.
6. There is strong built-up history, identity, and pride in the fabric of club assets, which can at times hinder change.
7. Opportunities exist to optimise the use of facilities and create more and stronger community connections.



# COMPLIANCE

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

Overall, club committees expressed their discontent with the level of compliance rugby clubs are now expected to contend with. In an age where volunteers are becoming more difficult to attract and retain, the amount of 'red tape' is seen as debilitating and diverting away from core activities. While there is a general acknowledgement of why some of this compliance is in place, it is perceived to be making club delivery more complex and burdening.

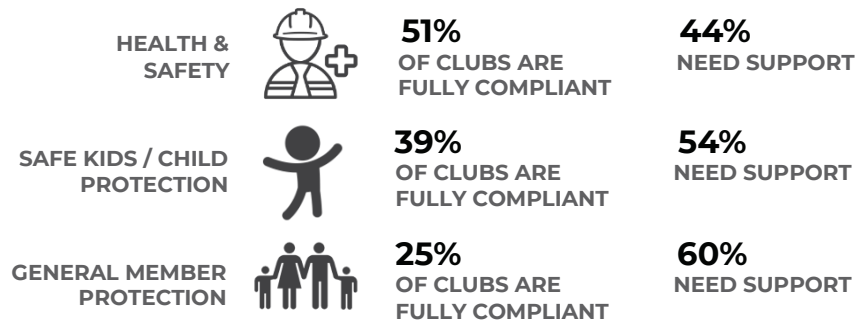
Based on a self-assessment of their awareness of compliance requirements and their level of compliance, clubs were generally comfortable with the following:



To assist with compliance, some clubs contract out food and beverage services to remove a level of compliance.

## COMPLIANCE SUPPORT

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



While these areas were rated to have low compliance and a high level of support needed, New Zealand Rugby has already produced club material to assist. This means that the materials produced were either insufficient to meet club needs, not communicated effectively, hard to access, and/or that more hands-on support is needed.

Similar comments were raised during engagement regarding the Incorporated Societies Act 2022 and the need for more assistance from New Zealand Rugby (including a template constitution). This work was already under development, suggesting that communication channels are not functioning as well as they could be.

Some challenges were also raised around the Reserves Act and how, in some regions, it is being interpreted by certain Councils. The restrictions placed on clubs under the Act are impacting how they deliver and drive new revenue streams to offset reliance on grant funding.

## CHALLENGES RAISED BY CLUBS

1. Gaining access to resources i.e. scrum machine safety guidelines and police vetting guidance.
2. The perceived cost and process of vetting coaches and team managers is prohibitive.
3. It is difficult to recruit volunteers as it is. Compliance requirements are instilling fear and creating more administration making recruitment even harder.
4. Clubs are sometimes not the decision-makers or owners in relation to some compliance matters (e.g., legal entity or liquor license).

## WHAT'S NEEDED

1. Clear communication channels are required when resources are developed to assist awareness (especially the rationale behind needing the resource) and to improve uptake.
2. Easily accessible and digestible compliance content/material.
3. A simple checklist to provide clarity on what is needed in order to comply.
4. 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).
5. Provide additional opportunities for clubs to discuss and work together on compliance responses. For instance, collaboration between clubs and the PU on resources when there are regional differences i.e. Reserves Act interpretations and liquor licensing.



# 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. For effective club changes to occur this needs to be addressed. This includes:
  - a. Needing greater clarity on the purpose, roles and responsibilities across all levels – who is doing what and when across the rugby landscape.
  - b. Agreed communication channels and clearly aligned messaging from New Zealand Rugby, through to Provincial Unions and down to grassroots.
  - c. Stronger club connection opportunities with involvement from the Provincial Unions and New Zealand Rugby to understand what is happening across the club network and what support is required. For club rugby to thrive, clubs need to work together, not in competition with each other.
  - d. Taking a more balanced approach to club wellbeing, with some concerns centring around too much focus being placed 'on the game' and not on wider club capability.
  - e. Clearer transparent investment into club capability. Providing transparency on what is being targeted and accountability for outcomes. Many clubs and stakeholders remain sceptical of where investment or resources are being allocated.
  - f. Having defined action plans pertaining to clubs which withstand changes in personnel at the club, Provincial Union and/or New Zealand Rugby level.
2. **Changing mindsets** in often very traditional club settings with strong viewpoints and historical connections. As has been evidenced in many club examples, change has primarily been driven by crisis. Key catalysts for change include:

- a. When the cost of running often large facilities is no longer viable.
- b. When the cost of undertaking large capital projects is not viable. This often occurs when funders are seeking different approaches to maximising their investment for the greatest community return (rather than specific code-centric rugby outcomes).
- c. When it is not viable or sustainable to field a premier, division 1 and/or 2 team.
- d. When a club is in financial peril, change must occur to ensure survival.
- e. As clubs are reliant on 3-4 key volunteers, any unforeseen change in leadership inevitably results in a vacuum of knowledge and skill set.

Bringing about change requires having a critical mass of people who wish to adopt a more progressive approach. It is essential to have the right people, with the right skills, in the right place at the right time. It was often cited that club progression was stalled by not having these factors aligned.

People wanting change often cited the 'Old Boys' network as shutting down progressive thinking. Many younger volunteers indicated they felt silenced and often ended up just walking away.

3. Overall, member decline has wide-reaching impacts.
  - a. A high and increasing school churn rate has implications for fielding both colts and senior teams. With a smaller pool of players to attract and select from, clubs are creating an 'arms race' for players (potential financial, social, and cultural impacts).
  - b. Membership decline in areas also experiencing population decline (especially at playing age) places extra strain on clubs to field teams (particularly at a colts and senior level).
  - c. Clubs need to form teams collaboratively, amalgamating or folding altogether as senior teams cannot be fielded.

- d. Accessibility and connections within rural areas could become more difficult as team and/or club memberships decline. This is because team members are likely to come from a wider geographic catchment. This will create greater travel times for training and/or games and will likely increase participation barriers.
  - e. Decline in numbers at the point junior players transition between non-contact to contact versions of the game could get notably larger with ever-increasing injury concerns. This could further lower the core junior cohort of players.
  - f. Reduced members can decrease rugby's value proposition in the eyes of funders and other key stakeholders (e.g., Councils).
  - g. A reduced membership weakens the volunteer base (which is intrinsically linked to membership).
  - h. Less social cohesion and connection – the intangible well-being benefits of being part of a rugby club.
4. **'Fit-for-purpose' facilities:** Achieving fit-for-purpose facilities will become increasingly more complex and costly. Factors to consider include:
- a. Aging-built facilities across the club network, which need investment, will continue to grow.
  - b. Difficulties are already being experienced in meeting the needs of gender and culturally diverse communities.
  - c. High proportion of clubs have planned, or are proposing, field and built infrastructure developments against a backdrop of a more restricted funding landscape. Not all required developments are, therefore, likely to occur.
  - d. Clubs are potentially missing possible opportunities for new collaborative developments due to being overly wed to historic links and affiliations and a desire to “do it the traditional rugby way”.
5. The need to understand and **reflect societal change** in the club environment. In particular, this requires understanding the way participants (current and prospective), supporters and the wider

community want to engage in rugby club activity. Grasping this need to change can be restricted by a range of other highlighted challenges (i.e., having diverse and proactive mindsets and suitable facilities).

## OPPORTUNITIES

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

1. **Sharing the positives** – engagement with clubs has highlighted the raft of exciting and positive initiatives (either ongoing or new) across all facets of rugby club operations. There is currently relatively low awareness of initiatives and day-to-day operations between clubs and across Provincial Unions.

When shared as part of wider facilitated discussions, these were received positively, and many clubs wanted to hear other examples from around the country (and overseas) to see what they were doing.

Sharing these initiatives and stories allows clubs to hear from their own to gain a firsthand appreciation of the background context, what they did and learned and the impact it had. In doing so, it provides thought-provoking material for clubs to understand how approaches could be adapted and implemented in their own setting.

2. **“For the betterment of rugby”** – there was an acknowledgement from the rugby club community that rugby needs to take a wider focus on what was best for the network and not just their club (being more “openminded, open to change and less patch protective”). While people are loyal and want to drive success right across their own club, there was an understanding that one club's rise at the expense of 3 others is not going to help establish long-term quality experiences or create a sustainable club network.

These sentiments need to be harnessed and used to come together as a code, with clubs at the heart. Achieving this involves identifying opportunities for clubs to share information and better coordinate activities.

3. **Working collaboratively/having direction** – this approach is all-encompassing and involves.
  - a. Needing to balance the onus placed on clubs to effect change via utilising existing volunteer resources and online tools, and augmenting this with the provision of more intensive resource support to drive initiatives. The mix of the two will be the most transformational.
  - b. Having a clear and agreed action plan between New Zealand Rugby and the Provincial Unions on how investment, support and implementation will be effectively delivered to the club network.
  - c. Having clear and direct communication channels with clubs (currently it appears that messaging and resourcing are not necessarily received or translated well).
  - d. New Zealand Rugby placing more emphasis on demonstrating the value of the community game, how it is marketed, and coordinating the messaging used – “telling the good stories about grassroots rugby.”
4. **Resources** – a lot of the resources and support cited as being needed by clubs does appear to be available and has been extensively developed. This would suggest that information/resources have not been well communicated, are difficult to access, do not meet the needs, and/or more support is needed on the ground to enable its uptake.

Based on reviews of existing material, and feedback from clubs, a combination of the above appears likely. Due to the large body of work already completed, the approach should primarily centre around optimisation and collaboration (review, refine, communicate and wrap-around support), rather than focusing on new resource development. It needs to be packaged in a way that is meaningful and relevant to clubs.

5. **The network**—The network of rugby clubs has substantial geographic reach into most local communities across the country. Rugby’s

prominence remains strong, providing a broad foundation from which to build and leverage.

6. **Capitalise on the profile of rugby** – Rugby maintains a high profile in the community and with stakeholders. Funders and stakeholders want to support rugby clubs due to their positioning in the community, the geographic spread, and the generally large membership base. With more direction, this profile can be further harnessed and leveraged to support the club network moving forward.





# RECOMMENDED RESPONSE & ACTION PLAN

A multifaceted approach is required to support clubs in addressing identified challenges, seizing prospective opportunities, and effecting change. This includes a mix of responses (including digital, toolbox, collaborative, and facilitation) that will require buy-in and connection across all levels of the rugby ecosystem.

**Digital Response** – Ensuring information and resources are readily accessible, can be updated to remain relevant (via a centralised repository), remain or become connected with younger audiences (attracting and retaining younger generation in the game) and create streamlined efficiencies (remove duplication).

**Toolbox Response** – Maintaining and building the ‘club toolbox’ to provide day-to-day club resources (i.e. templates, manuals, and policies). This is a traditional response, but one that is still required to provide practical assistance. It can gain maximum value when wrap-around support is offered to assist uptake and implementation.

**Collaborative Response** – Leadership, collaboration and sharing are critical for supporting club development. This needs to occur across and between all levels of the rugby landscape – clubs, Provincial Unions and/or New Zealand Rugby.

This requires clearly devised action plans between Provincial Unions and New Zealand Rugby (what is required when and who is responsible for delivery). To be successful, plans need to be well communicated across all partners to gain buy-in and show direction. In essence, this requires dropping barriers and looking at what is best for rugby – collectively we need to be stronger.

This needs to be coupled with information sharing about the challenges being experienced, prospective initiatives, and what is working well (or not working). Rugby club workshops held across the country were well-received by clubs as they promoted examples of what was happening and facilitated potential solution finding. These workshops should be the catalyst to build from.

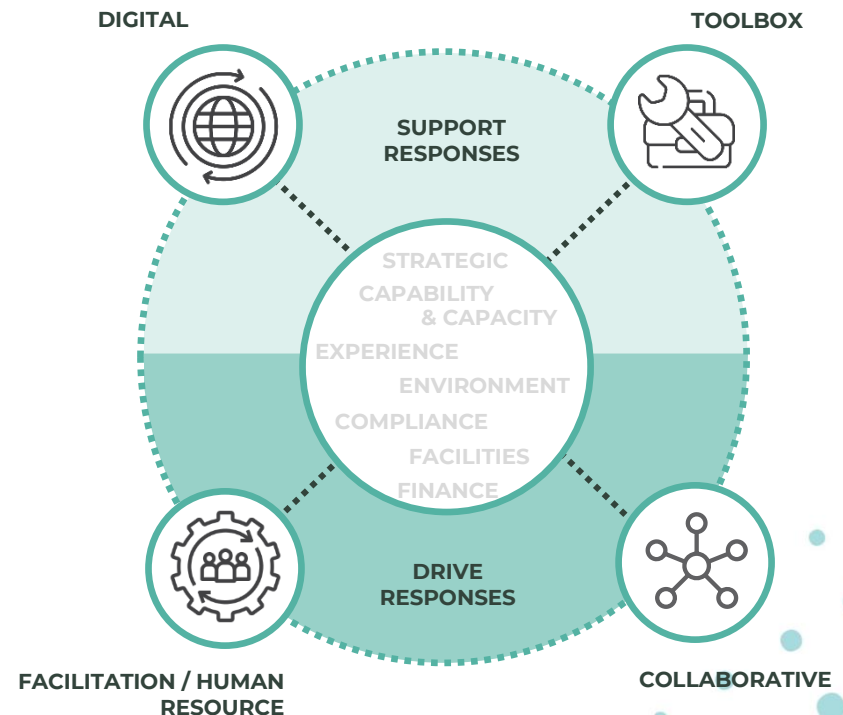
*“If only rugby knew what rugby knows.”*

**Committee Member**

**Facilitation/Human Resource Response** – More than resource development is required to meaningfully ‘move the dial’. This has been evidenced both within rugby and in various other codes that have large and changing club networks.

Providing or building upon toolkits and digital responses will have limited impact alone. Many of these resources are already available in generic or rugby-specific form but largely appear untapped. Low awareness coupled with limited volunteer time, means driving initiatives forward is beyond the capacity (and potentially capability) of some clubs.

There appears to be a genuine desire across the rugby landscape to move clubs forward. Achieving this will be dependent on having people resources at the heart of equipping clubs and driving change. This support may need to come from external independent resources and/or directly from within the rugby community.



## RECOMMENDED ACTIONS – IMMEDIATE TERM

ITEM	FOCUS AREA(S)	RESPONSE APPROACH	TIMING	WHO
<b>Funding Coordination</b> Undertake a funding coordination pilot across multiple clubs in a region to best identify available and relevant funding sources, seek potential cost savings and reduce the volunteer burden across clubs.	Finance	Facilitation/Human Resource	Immediate Piloting	Lead: Identified PU area(s)
		Collaborative		Support: NZR
<b>Template Constitution</b> Publish and then widely distribute the club constitution template with associated support on how it can be tailored and adopted by clubs (connect this to guidance on the Incorporated Societies Act 2022).	Strategic	Toolbox	Immediate	Lead: NZR
	Compliance	Digital		Support: PUs
<b>Strategic Planning/Our Club's Future</b> <ul style="list-style-type: none"> <li>Pilot facilitated strategic planning session(s) with clubs.</li> <li>Develop a supporting resource toolkit for clubs.</li> </ul>	Strategic	Facilitation/Human Resource	Immediate Piloting	Lead: Identified PU area(s)
		Toolbox Digital		Support: NZR
<b>Governance Connection</b> Partner with the Chamber of Commerce, Institute of Direction and/or large corporates in identified regions to pilot governance connections with clubs (this could be in the form of a co-opted or appointed committee position or as external support).	Strategic	Collaborative	Immediate Piloting	Lead: PUs
		Facilitation/Human Resource		Support: NZR
<b>Club Connect</b> <ul style="list-style-type: none"> <li>Establish regular and informal club workshops to share insights, what is working well (or not working well), what challenges are being experienced and how clubs could work together. This could be held across a mix of local, regional and/or national settings.</li> <li>The workshops should be used to provide updates on project implementation, where the focus areas currently sit and provide a setting for sharing practical examples.</li> </ul>	All	Collaborative	2024 / 25 onwards	Lead: NZR (PU Club Connect Workshop)
		Facilitation/Human Resource Digital		Lead: PU (Club Connect Workshop), Clubs
<b>Club Manual</b> <ul style="list-style-type: none"> <li>Update the content of the old club manual and ensure it is digestible and easily accessible by the rugby community.</li> <li>Focus to be placed on position descriptions, timeline/calendarised activity and general club operations.</li> <li>Outlining financial practices and requirements associated with rugby clubs.</li> <li>Includes a database or link to existing sites for exploring different funding streams.</li> </ul>	Strategic	Toolbox	2023/24 & Ongoing	Lead: NZR
	Finance Capability & Capacity	Digital		Support: Working Group

ITEM	FOCUS AREA(S)	RESPONSE APPROACH	TIMING	WHO
<p><b>Club 'Health Check' and Action Plan</b></p> <p>Build upon existing rugby and wider sector health check templates/platforms to provide a nationwide tool to identify key focus areas (consideration should be given to clubs from different settings). Note: this tool should be supported with a club action plan (outlining what we need to do, when and who is tasked with implementation).</p>	Strategic Capability & Capacity	Toolbox Digital	2024	Lead: Working Group Support: NZR
<p><b>Case Studies</b></p> <p>A series of case studies are developed to showcase what rugby clubs are implementing across the country and different settings. Some highlighted areas of focus should concentrate on (note these are based on examples raised during club engagement):</p> <ul style="list-style-type: none"> <li>Clubs who have implemented new committee structures and ways of undertaking operations (i.e. more tasked-based approach), and what impact these have had.</li> <li>Use of shared services to drive efficiencies.</li> <li>How regions are providing leadership development and engagement opportunities with the Provincial Union.</li> <li>Outline the diverse and unique funding streams used and investments made by clubs.</li> <li>Series of volunteer recruitment and recognition initiatives.</li> <li>Coach development initiatives used (both internal and external approaches).</li> <li>Introducing paid staff – benefits, challenges, what to watch for, structures and roles.</li> <li>Promotion of marketing and communication channels/materials resulting in positive exposure and interest.</li> <li>Success stories using digital platforms.</li> <li>Instilling a club culture of inclusiveness.</li> <li>Diversity and inclusion success stories i.e. Asian demographic participation.</li> <li>How combined teams have been implemented and the impact this has had.</li> <li>Experiences where clubs have extensive collaboration or have merged.</li> <li>How clubs are currently engaging with schools to optimise resources and assist with club connection.</li> <li>Introduction of midweek games and the process used to establish this.</li> <li>Facility planning and development analysis used to provide evidence for driving change.</li> <li>How some rugby activity has been centralised to one park to gain efficiencies and best utilise resource.</li> <li>Process and learnings from establishing multisport hubs.</li> <li>Using facilities to generate revenue.</li> </ul> <p>All case studies should include links to resources and potential support for identifying what could work best within individual club settings.</p>	Strategic Finance	Toolbox Digital	2024 & Ongoing	Lead: NZR Support: PUs
<p><b>Implementation Oversight</b></p> <p>NZR maintains a workforce with club capability expertise to provide oversight on project implementation. These staff are the conduit for connection between grassroots and Provincial</p>	All	All	Ongoing	Lead: NZR

ITEM	FOCUS AREA(S)	RESPONSE APPROACH	TIMING	WHO
Unions through to NZR. This includes connecting relevant parties and resource, identifying synergies and opportunities across the wider network.				
<p><b>Online Platform</b></p> <p>Review the existing information technology platforms already used i.e. NZR and PU websites and Sporty (registration system and various club websites), alongside alternate means (i.e. club portal) for establishing a 'home for rugby clubs'. This should be the repository of all resources and information for club operations (which can be easily updated without needing to notify or update other platforms across the rugby network).</p> <p>Potential opportunities could expand into other tools such as CRM, membership benefits, financial integration, communications and websites.</p>	All	Digital	Immediate & ongoing	<p>Lead: NZR</p> <p>Support: Working Group</p>

## RECOMMENDED ACTION PLAN – FORWARD PLANNING

ITEM	FOCUS AREA(S)	RESPONSE APPROACH	TIMING	WHO
<p><b>Resource Development and Support</b></p> <p>Review findings from the pilots and allocate resources to roll-out initiatives.</p>	All	All	2024 onwards	<p>Lead: NZR</p> <p>Support: PUs / Working Groups</p>
<p><b>Secondary School Rugby</b></p> <p>New Zealand Rugby to continue engaging with School Sport New Zealand (and other relevant parties) to investigate the school space and provide direction/recommendations on how clubs can best connect, integrate and/or partner to reduce player attrition rates during and post-secondary school.</p>	<p>Experience / Offerings</p> <p>Capability &amp; Capacity</p>	<p>Collaborative</p> <p>Facilitation/Human Resource</p> <p>Toolbox</p>	Ongoing	Oversight: NZR
<p><b>Bulk Buying Potential</b></p> <p>Explore opportunities to source bulk buying options to support club expenditure. Some key items identified include insurance, power, transport, and strapping tape.</p>	Finance	Collaborative	2024/25	Lead: NZR
<p><b>Activation Fund</b></p> <p>Explore the development of an 'activation' fund which can support the pilot and/or the development of 'experience/offering' initiatives and/or used to support facility planning (to help offset declining investment into this space).</p>	<p>Experience / Offerings</p> <p>Facilities</p>	<p>Collaborative</p> <p>Facilitation/Human Resource</p>	2025	Lead: NZR

ITEM	FOCUS AREA(S)	RESPONSE APPROACH	TIMING	WHO
<b>National Volunteer Round</b> Explore undertaking a national campaign with supporting material to acknowledge all the volunteers across our rugby landscape. A national campaign would resonate with onboarding sponsors and can be the catalyst for clubs to build upon (with coordinated resources provided at a national level). This includes more volunteer recognition at a regional level – building a base and resources to enable ongoing recognition.	Capability & Capacity	Digital Toolbox	2025 onwards	Lead: NZR
	Experience / Offerings	Collaborative		Support: PUs
<b>Grassroots Rugby Promotion</b> Nationally led and coordinated promotion of grassroots rugby. Including emphasis on ‘the why’ – the ‘mateship’ created, fun, whanau connection/the generations before us, our nation’s game, the different ways of playing the game, a game for everyone etc.	Capability & Capacity	Digital Toolbox	2025 onwards	Lead: NZR
	Finance Experience / Offerings	Collaborative		Support: PUs, Clubs
<b>Coach Mentoring System</b> Establish a coach mentoring system as a mechanism to support the development of coaches. Emphasis to be placed on isolated rural communities.	Capability & Capacity	Collaborative	2025 onwards	Lead: PUs
		Facilitation/Human Resource		Support: Clubs
<b>Rugby ‘Give-Back’ Initiative</b> Create a regional pool/database of former coaches, players and referees that could assist on an irregular basis to coach or shadow coach training sessions (informal coach development tool). Understand interest areas so effective connections can be formed. The approach also provides players with a different voice keeping training fresh.	Capability & Capacity	Collaborative	2025 onwards	Lead: PUs
		Facilitation/Human Resource		Support: Clubs, NZR
<b>Coach Resource – IT Solutions</b> Explore IT development solutions which can support easily digestible tools for running training sessions i.e. Netball New Zealand Coach App.	Capability & Capacity	Digital	2025	Lead: NZR
				Support: PUs
<b>‘Profile’ Players</b> Explore opportunities (formally or informally) to activate ‘profile’ players so they can connect with the club scene (i.e. attend fundraisers, be involved in muster days, referee a rippa game). This reinforces the strategic position of NZR.	Experience / Offerings Capability & Capacity	Collaborative Facilitation/Human Resource	2025 onwards	Lead: NZR, Super Clubs, PUs

ITEM	FOCUS AREA(S)	RESPONSE APPROACH	TIMING	WHO
<p><b>Club Network Review</b></p> <p>On the back of club network findings and feedback received from the community, undertake an independent review of the club network for select areas. This will include considering the best delivery model for rugby – including the number of clubs, geographic catchments and function. Of importance is providing wrap-around resourcing to work alongside clubs on various options, and shape and form positive implementation.</p>	All	All	As required	<p>Lead: PUs</p> <p>Support: Clubs, NZR</p>
<p><b>Annual National Club Fundraiser</b></p> <p>Organised by NZR which taps into the vast stakeholder connections. E.g. Irish Rugby Union 'Your Club Your Country'.</p>	<p>Finance</p> <p>Capability &amp; Capacity</p>	<p>Collaborative</p> <p>Digital</p> <p>Toolbox</p>	2025 onwards	<p>Lead: NZR</p> <p>Support: PUs, Clubs</p>

### KEY CONSIDERATION FOR RESOURCE DEVELOPMENT

- The development of all tools and resources needs to consider how they can work and/or be adapted across different settings. It is paramount that engagement and testing with a variety of clubs are undertaken to ensure the best tools, support, and case studies are provided.

Note: Additional forward Planning ideas may drop out of the immediate-term actions.

### RECOMMENDATIONS/KEY NEXT STEPS

- Develop a snapshot version of the report which summarises the material so future direction can be easily digested. It is important that the full report remains available for transparency and to provide full background context.
- Dedicated staff resource is allocated to maintain grassroots engagement, continue project momentum and oversee national coordination and implementation. The role will provide a critical liaison between New Zealand Rugby, Provincial Unions and clubs.
- A detailed action plan is developed and agreed upon between New Zealand Rugby and the Provincial Unions so there is full clarity on what is being undertaken and their respective roles and responsibilities.
- Ongoing budget/investment allocations should be investigated to support club capability outcomes. Any subsequent investment should align with actions and outcomes outlined within the report with clear deliverables – with a focus on: *“Rugby at the Heart of our Communities”*.
- Commence pilot projects and other targeted resource developments promptly to maintain momentum, instil confidence, and provide tangible actions within the community - demonstrating a commitment to the support and development of grassroots rugby.

