



The future of Bowls NZ

A REPORT FOR BOWLS NZ

Why explore the future?

Bowls NZ (BNZ) is interested in how it might best position itself to be fit for purpose and sustainable into the future. Its Board and senior management are conscious of the rapid speed of change occurring across society, and how this will impact the environment in which it works.

Therefore, it agreed to partner with Sport NZ to explore possible and plausible futures that may play out, to enable it to test its strategy through understanding the long-term issues and challenges shaping the future.

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Topics covered included:

- The future as predicted, versus the future as a learning journey (identifying and testing the assumptions held by BNZ that are influencing how the strategic issues are being considered)
- The 'used future' examining what traditional practices need to be challenged to create new futures
- Emerging disruptions and transformations ahead
- Scenarios to illustrate alternative futures to consider a much wider range of contexts in which BNZ may be operating and to generate new insights into possible future developments
- Consideration of novel ideas and risk reduction to enable a level of anticipation, and therefore preparation, for the inevitable surprises that BNZ will encounter.

These topics underpin a new approach to having conversations about the future and identifying narratives to align to a period of rapid change. To do this, it is important to imagine a range of alternative scenarios for the future. This can give us greater confidence that we are taking the right actions today – fit for a future we want, and adaptive for the changes and disruptions we will experience in the coming decade.

This document summarises the BNZ strategic foresight conversation from the development of an initial baseline perspective to the elaboration of four potential scenarios.

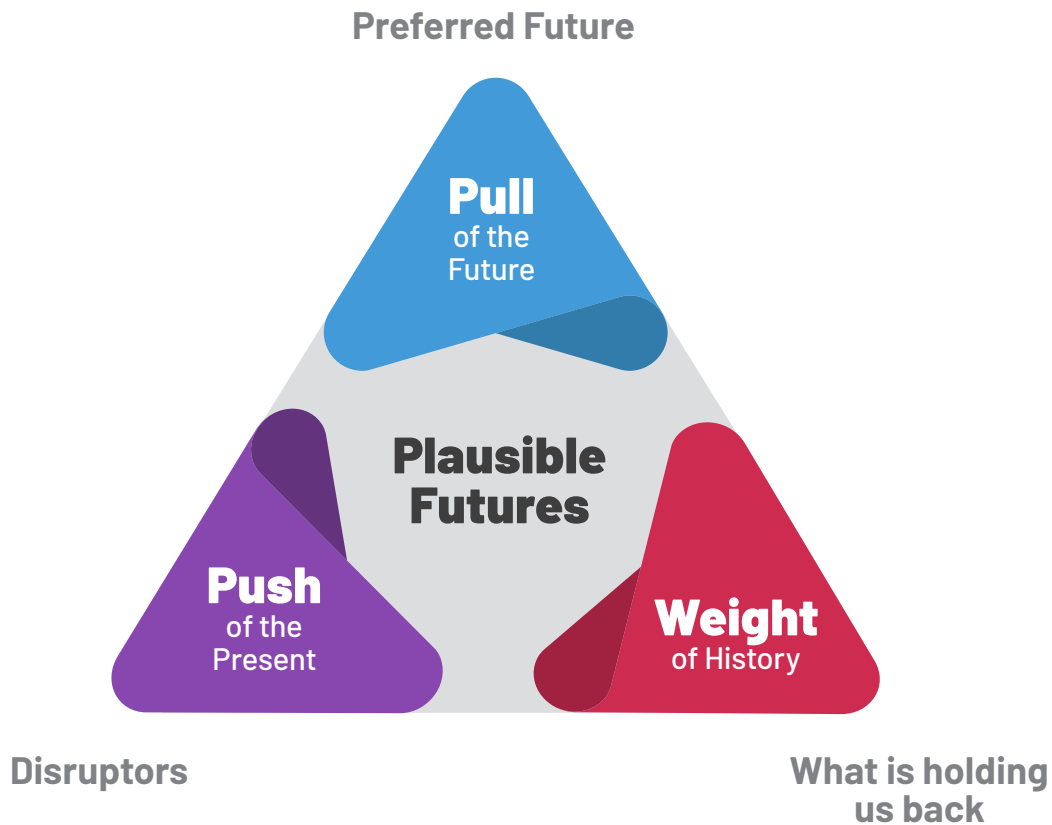
This involved two facilitated workshops involving the BNZ Board and senior management.

A 5-10 year time horizon was used.



Underpinning approach – futures triangle

The workshops used the *Futures Triangle* developed by Sohail Inayatullah to map the past, present and future to help explore the space of plausible futures.



The basic idea is that there are three dimensions that shape plausible futures: the weight of the past; the push of the present; and the pull of the future. The tension and interaction between these three forces creates a possible future space, inside the triangle. The workshops used the triangle to explore the following questions:

Weight of history

- What is holding us back, or getting in our way?
- What are the barriers to change?
- What are the deep structures that resist change?

Push of the present

- What trends and disruptors are pushing us towards particular futures?
- What quantitative drivers and trends are changing the future?

Pull of the future

- What is pulling us towards particular futures?

Four possible and plausible future scenarios for BNZ were created from the disruptors viewed as the most impactful and uncertain for softball.

If you would like to read more about the futures triangle, Sohail Inayatullah's paper on [Six pillars: Futures thinking for transforming](#) is recommended.

What BNZ thinks will happen in the future

One of the challenges with foresight is becoming overwhelmed with what's changing and struggling to make sense of the implications. It is easy to get misled by extrapolating from obvious trends and developments. A common approach is to develop scenarios that explore plausible future states. The baseline future is one possible future. This is the future the bowls community assume will occur.

The basis of BNZ's baseline future was identified via a survey completed ahead of the first workshop by a cross-section of the bowls community. The survey questions are designed to draw out a common understanding of perceived opportunities, threats and aspirations for the future of bowls in New Zealand. This provided the basis for the baseline future – the future participants assume will occur. (Survey responses are provided in Appendix 1).

The purpose of the "baseline future" is not to predict what the future of bowls will look like in 5-10 years, but to help identify the obvious issues, and stimulate conversations around how the bowls community could respond.

In BNZ's baseline future, it is assumed there will be:

- A growing membership as bowls broadens its appeal with younger people, Māori and Pasifika, the disabled community – demonstrating a commitment to being more diverse and inclusive.
- Increased participation and demand for the use of bowls facilities as bowls clubs reposition themselves as community hubs.
- High performance success continues to be important to the profile of bowls.
- Increased product adaptation to respond to greater competition for leisure time, and a continued growing demand to engage in sport but in less structured and formal formats.
- Sound governance and management across all disciplines, but within an environment of decreasing trust in institutions and government and increasing polarisation of opinion.
- Greater use of technology to deliver information and results.
- Enhanced alignment with other groups which currently sit 'outside' the bowls family.
- A national body that is financially secure and able to fully embrace the interests of everyone.

Issues that might disrupt

The bowls community recognised the following issues could disrupt the future they assume will occur:

- There may be a decline in interest in sport as other leisure pursuits emerge to engage attention. E-sports could capture some of this attention.
- In the face of seemingly more pressing issues (e.g. global conflict, climate) sport may no longer be considered as important to the support of physical and mental wellbeing or elite success.
- Ongoing economic challenges could restrain funding for the sport sector. Even without such an external shock, funding models could change and alter present revenue streams.
- Younger generations may view volunteering in a different way than their parents, impacting the traditional expectations of volunteering.
- The connection between elite success and participation may come under greater challenge, resulting in increased scrutiny on where Bowls NZ places its focus.
- Continued workforce supply issues, changing attitudes to volunteering, and an increased desire from people to use their time differently may result in an increased challenge to attract and retain talent.
- Ongoing urbanisation may place greater pressure on bowls clubs being repurposed as housing.

There are probably no surprises to those within the bowls community in this baseline future scenario. It reflects what many people and organisations in the sector are contemplating now – how do they compete with virtual sports, how are they going to ensure they have adequate participants and funding levels going forward, how do they address current inequities in the system, and do they have the appropriate delivery model and capabilities to respond to societal challenges.

A baseline future is what we generally think will happen if there is no change. It is not radically different from today and is derived from what we see in the world around us. Creating a baseline future is a good way of emptying the mind of the most pressing worries. Only then can we step back and think of alternatives. Getting those concerns and fears out in the open can help identify not only what you want to avoid but some of the characteristics that you want to work towards.

Moving beyond baseline future

The baseline future is a collection of predictions of the future context within which the BNZ strategy will be pursued. The quick discussion within the workshop immediately highlighted the potential alternatives that could emerge to influence the strategic environment. This underlines the need for the move away from prediction to instead consider the most useful questions. A few emerged in the baseline future discussion including:

- To what extent do plans assume the current delivery structure is appropriate?
- Given the importance of volunteers to bowls delivery, is it safe to assume younger generation's view volunteering in the same way as their parents or grandparents?
- How important is elite success to the profile and relevancy of bowls?
- Is it fear of change that is a barrier to progress, or is it better described as a reluctance to change as current members are happy with the status quo?

These questions are unlikely to surprise those engaged within BNZ and are likely to form the basis of current strategic discussions. The variety of perception or response to these questions emphasises that no single future can be assumed. An exploration of how respective scenarios may challenge these questions leads to more robust strategic dialogue. It is easy to get misled by extrapolating from obvious trends and developments.

To avoid this, a common approach is to develop scenarios that explore plausible future states. Developing these scenario narratives can be achieved through the combination of uncertain disruptors to form stories of the future.

Sport NZ has identified 31 phenomenon as causing the most disruption to the future of sport and recreation in New Zealand - [Disruptors](#). Of these, bowls identified the following as potentially most disruptive to bowls.



Most impactful disruptors to bowls

The following future disruptors were highlighted as potentially the most impactful for BNZ. Each are linked to reports.

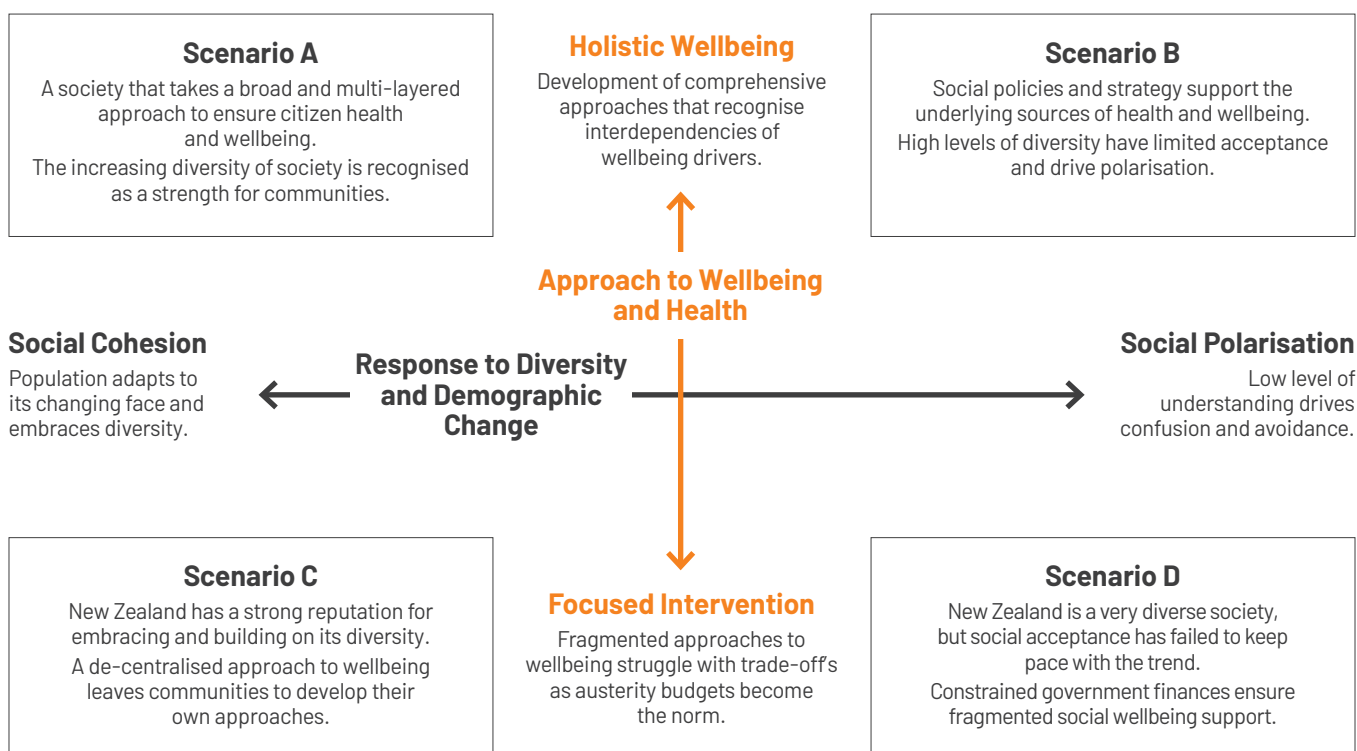
<u>Inequality</u>	Socio-economic inequalities, while primarily associated with financial measures, also include the digital divide determining access to digital products & services so vital to full participation in contemporary New Zealand.
<u>Workforce changes</u>	The play, active recreation, and sport sector will be subject to the same forces (e.g. demographic) shaping other workplaces. Challenging for the paid sector, these will prove particularly challenging for the key volunteer support groups.
<u>Status of public funding</u>	Managing the government's finances will be challenged by a multitude of global and domestic challenges arising from the pandemic aftermath, geo-political tensions and climate demands. Potential moves between orthodox and heterodox economic policies will determine future funding status.
<u>Social Resilience</u>	Changing patterns of social resilience that are associated with levels of trust, changing social values and world views. Reflects debates within New Zealand around the collective support of common norms and rules.
<u>The changing nature of work</u>	Even before the pandemic, the idea of a stable career and retirement was threatened by changing job patterns and increased longevity. Together with more transient employment contracts and the emergence of automation, the future of work is looking increasingly complex
<u>Changing leisure patterns</u>	The influences which will shape the future of leisure in New Zealand. Including disruption in adjacent sectors that start to obscure the boundary between leisure activities. The range of leisure experiences will diversify as individuals are enabled to tailor their activities to suit their preferences and available time.
<u>Climate change response</u>	Energy transition and political action are required to mitigate climate change, and includes the need to address climate change within the activities of the sector
<u>Athlete participation and wellbeing</u>	The pressures on athletes continue to intensify with implications for both physical and mental health. It will remain a critical dimension to the future competition environment with psychological awareness, changing social context, and appropriate use of technologies (e.g. biometric data) all part of the mix.
<u>Social licence</u>	Pressures on the Government to change priorities to address key issues may result in spending on the sector becoming more discretionary if sport is no longer regarded as a universal good. Athlete activism, opposition to travel and emergent social issues all contribute to the creation of an increasingly complex environment that the sector will need to navigate.
<u>Sustainable business models</u>	Future funding models will be heavily influenced by changes to broadcasting and sponsorship agreements that continue to reflect evolving consumer preferences, participants' ability to pay, and changes to gambling proceed distributions.

Following a group discussion and ranking exercise, increasing diversity and demographics and the government's response to wellbeing and health were the drivers chosen to develop several future scenarios. They were chosen based on potentially high impact and levels of uncertainty.

<u>Pandemic Social wellbeing policy</u>	The overall status of the population's health came into clear focus through the pandemic. This is likely to be the start of an ongoing challenge to respond to global health concerns as novel variants emerge both of coronaviruses and other disease challenges. The political hue of the government will determine the direction of social well-being policies (e.g., social assistance, housing etc) that all affect the individual's ability to participate in active recreation.
<u>Increasing diversity Ageing population</u>	The future is ageing Pākehā and growing (and younger) Māori and Pasifika populations. As the structure of the population changes, especially with the ratio of dependents/working adults, it will have implications for leisure time and patterns. Increasing diversity is likely to generate a far more kaleidoscopic context for the provision of PARS programmes. It will also increasingly bring to prominence alternative worldviews that will challenge historically dominant perspectives.

Alternative futures

To identify possible and plausible alternative futures for BNZ, four scenarios were created based on the opposite of two uncertainties playing out – approach to wellbeing and health and response to diversity and demographic change. It should be noted these scenarios will likely not happen exactly as described. They provide an opportunity to explore a plausible strategic context that could be encountered. The aim is to use them as prompts to highlight what may need to be considered over the coming period.



The full narratives for each scenario are provided in Appendix 2. While reviewing the narratives it is useful to hold the following questions in mind:

To do this, the group was split into groups with each assigned a scenario to address with the following questions:

- How would the BNZ strategy fare if the scenario eventuated?
- What implications does this have for participants, volunteers, and funders?
- What steps could BNZ take to develop greater resilience to the challenges?
- How can we work to support the development of the more positive outcomes?
- What actions could BNZ take to ensure its plans are effective across multiple scenarios and not predicated on one?

It's also worth considering how the other drivers noted may play out in these contexts. For example, how would changes in funding models be impacted in the given scenario?

Overall, the aim is not to judge whether the scenario will occur, but to consider what BNZ would do if it did.

Scenario A: Greening of the greens

A society that takes a broad and multi-layered approach to ensure citizen health and wellbeing. The increasing diversity of society is recognised as a strength for communities.

Key Implications

- Heightened focus on wellbeing and environment
- Community cohesion, cultural experiences and variety valued
- Ease of access to facilities the expected new norm
- Access to leisure activities has improved
- Cheap alcohol no longer a part of Bowls club attraction

Biggest Opportunity/Risk

- Position bowls club as an extension of the home – a place to connect with the community
- Adjust space to make it attractive to variety of activities in addition to bowls – a community hub
- Adjust setting to be more family friendly, e.g less emphasis on the bar
- Change the narrative to bowls being viewed as community connector, that is inclusive and celebrates diversity
- Less about competing with other codes; with emphasis on community connection
- Need to manage changed approach with current membership with respect
- Turf science needs to recognise support for environmental sustainability

Necessary Capabilities

- Community connector
- Social wellbeing mindset
- Communication and storytelling
- Partnering

Plausibility

Moderate to high plausibility. New Zealand society already diverse. Approach to health and wellbeing is evolving.



Scenario B: Raking

Social policies and strategy support the underlying sources of health and wellbeing. High levels of diversity have limited acceptance and drive polarisation.

Key Implications

- Wellness is key driver for leisure pursuits
- This is often a solitary and private activity with increase in people living alone
- Socialisation is sought via those with shared identities and values
- Improved cohesion is desired, but approaches cannot be agreed

Biggest Opportunity/Risk

- Adjust to trend and explore home based adaptations, including virtual products
- Buck trend and position Bowls as go to option for those who still want to connect
- Promote Bowls as a model to rebuild cohesion, with its emphasis on inclusion and diversity
- The loss of social cohesion across society diminishes the relevancy of bowls clubs

Necessary Capabilities

- Innovative mindset
- Technological nous
- Strong story telling
- Relationship management

Plausibility

Moderate. New Zealand still viewed as a largely cohesive society.



Scenario C: Crack an egg

New Zealand has a strong reputation for embracing and building on its diversity. A de-centralised approach to wellbeing leaves communities to develop their own approaches.

Key Implications

- Greater demand for locally led initiatives
- Expanded migration leads to new community activities, with diversity of local needs embraced
- Economic challenges have curtailed social and environmental programmes
- Funding support from government is more highly contested
- Increased demand for outdoor leisure, close to home, that is time flexible



Biggest Opportunity/Risk

- Re-positioning of bowls narrative to build understanding of what established community clubs have to offer
- Bowls to position itself as 'magnet' for diverse audiences looking for local leisure opportunities within supportive environment
- Strong promotion of bowls as activity that can be played at anytime to meet people's increased time constraints, with introduction of twilight leagues, casual play opportunities and downplaying of all day Saturday bowls as only competition setting
- Greater emphasis on community led initiatives and away from nationally led, one size fits all
- Greater governance diversity
- Explore shared services models to reduce costs and expand product range
- Greater emphasis on financial diversification given threat to existing funding models

Necessary Capabilities

- Local connections
- Storytelling
- Product adaption
- Relationship building training for clubs
- Advocacy

Plausibility

High. Signs of society more strongly evolving to this scenario. Key is for bowls to take advantage, noting it is well placed to do so.

Scenario D: Auckland comes to the regions

New Zealand is a very diverse society, but social acceptance has failed to keep pace with the trend. Constrained government finances ensure fragmented social wellbeing support.

Key Implications

- Work more sporadic, impacting consistent windows for leisure
- Less financial resource for retired community
- High migration causing friction
- People increasingly connect with like-minded others on-line
- Disinformation is creating mistrust and increased social barriers
- Urban density has increased pressure on green space

Biggest Opportunity/Risk

- Clubs to drive inclusion and diversity – risk of not is disconnected to community – an island of non-diversity
- Be creative about offer e.g. already doing twilight – invest in lights; modify; flexible rules; become less regimented
- Promote low-cost barrier to entry relative to other sports
- Promote fact bowls can be played anytime, alone or spontaneously, with latter encouraging social breadth
- Lawn bowls may not be supported – replaced by artificial
- Lease land – own building; or if privately owned at risk of sale
- Decreasing participation; not keeping pace with population growth
- Losing relevance, volunteers
- A microcosm of misinformation

Necessary Capabilities

- Inclusive – reach outside of current core group; talk language of others
- Strong communication and storytelling
- Marketing
- Event and experience delivery
- Clubs and inclusion champions

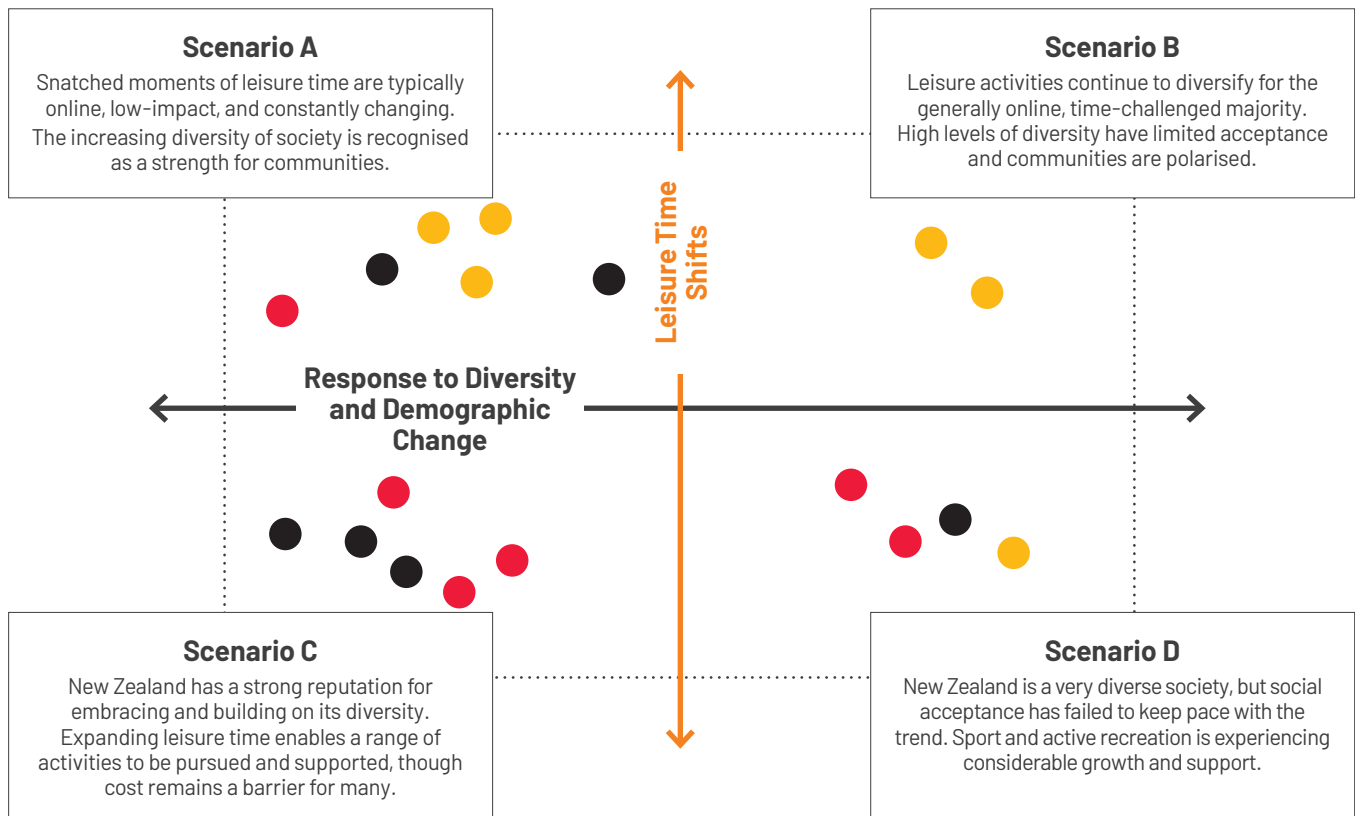
Plausibility

High. Business as usual amplified. Rolling out best practice.



Scenario Outlook

Participants identified the most preferred scenario (black), the scenario most reflected in the present (yellow), and what they believe to be the most likely future (red).



The scenario outlook exercise is qualitative and biased by the group perspective but is a useful mirror for reflection.

- There is a reasonable spread of views that the present is reflected across three different scenarios. This highlights that perceptions of the current context within the group are not clear-cut and reflect significant levels of ambiguity. This is healthy as it implies a spread of perspectives that can be explored with ongoing critique of assumptions.
- There is greater alignment on the preferred future with responders generally preferring a more cohesive society, but interestingly, are split on whether a holistic or focused approach to health and wellbeing is preferable.
- There is a wide variety of views on where the future context lies, with three scenarios featuring. This recognises the uncertainty about whether society will become more cohesive or polarised and whether a holistic or focused approach to health and wellbeing is adopted. This emphasises the need to consider all scenarios when making strategic decisions and should prompt greater exploration of reference points / data that validate the emergence (or otherwise) of the scenarios.

The scenarios provide a link between the developing New Zealand environment and the strategic conversation within BNZ. Having reflected upon them, and the strategic questions they prompt, it is useful to consider what early indicators point to their emergence. See appendix 4 for an example of a monitoring register.

The Preferred Future

Given the consideration of the range of future possibilities, a fundamental question remains:

What future does BNZ wish to make happen?

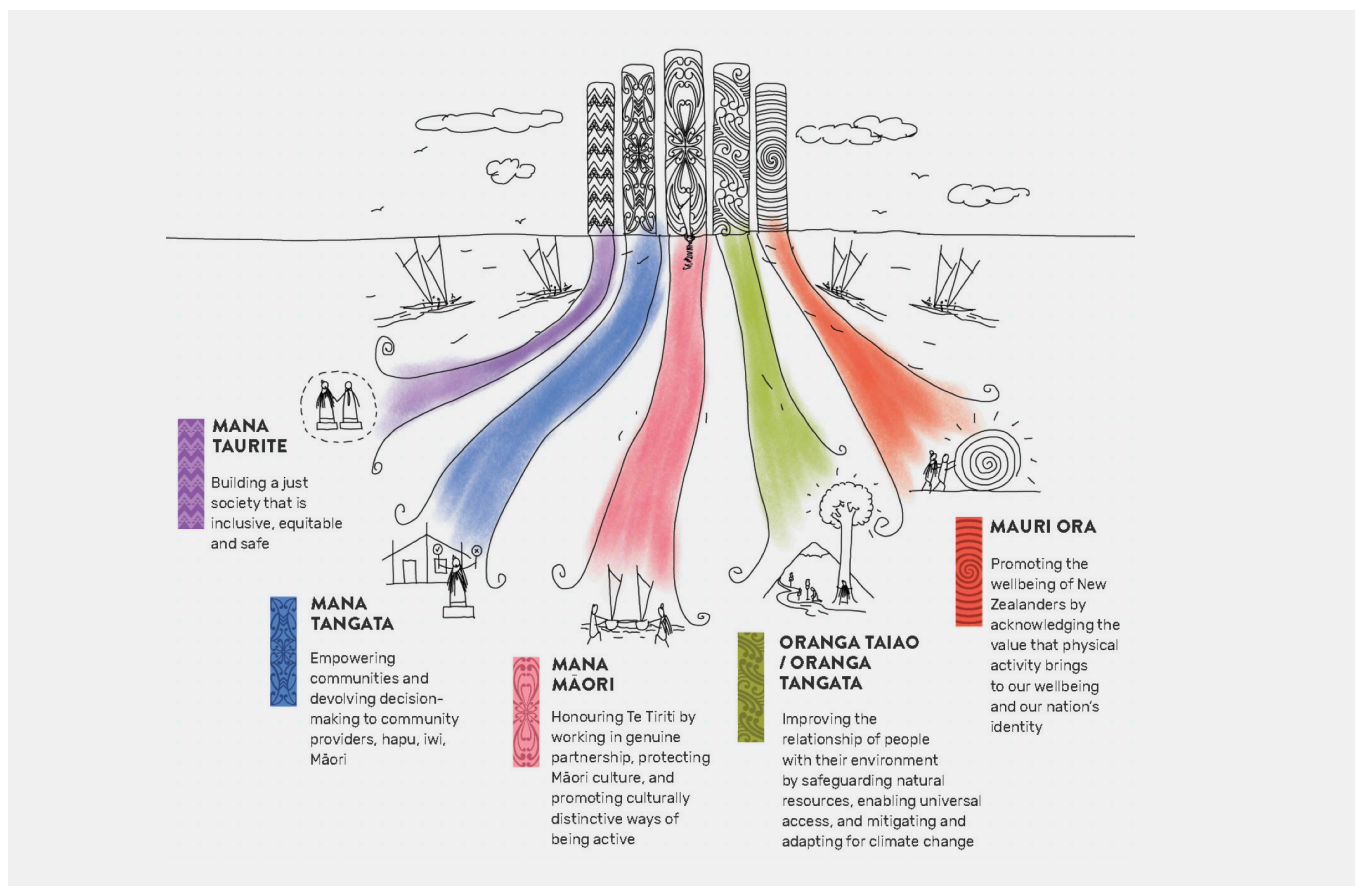
BNZ has a vision to be the best deliverer of sport into New Zealand communities.

Elements of this vision were communicated in responses to the survey and included:

- Being a sport for all New Zealanders
- Meeting the expectations of the community
- Adapting the offering and delivery to meet a broader range of interests
- Promote bowls as an inter-generational sport

Sector's preferred future

Sport NZ, in conjunction with the wider sector, has developed a preferred future that guides its decisions and approaches and is offered as an exemplar.



BNZ has strong alignment with three of the five characteristics, notably Mana Taurite given its accessibility and desire for enhanced diversity. It also aligns to Mana Tangata given its networks of clubs, its ability to connect people in communities, and desire to reposition its clubs and community hubs. This is of particular importance in a time of decreasing trust in institutions and each other, and growing polarisation accelerated by information, disinformation, and misinformation.

Bowls also contributes to the physical and mental wellbeing of New Zealanders (Mauri Ora).

Weight of history

In workshop 1, softball identified some practices, structures and mindsets that are not aligned to its future aspirations and are therefore holding the sport back.

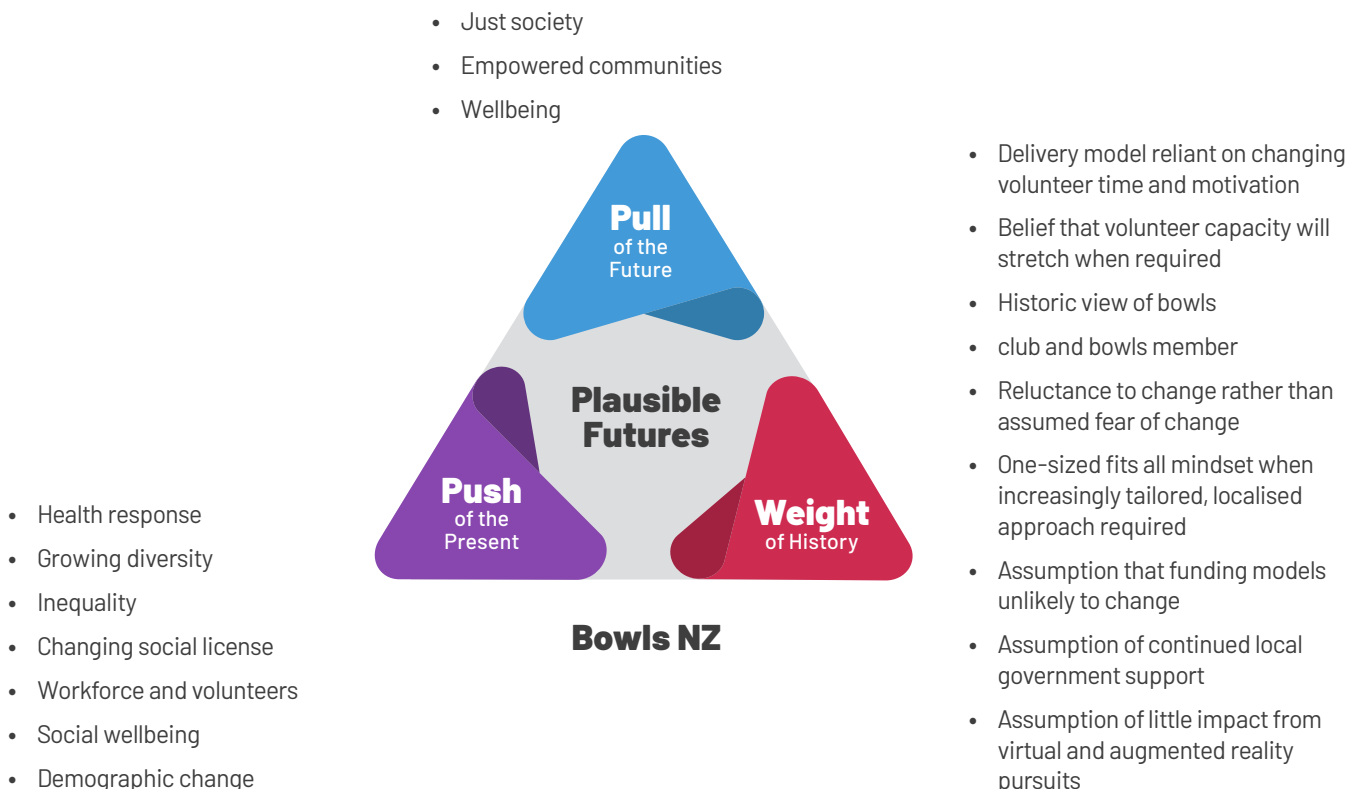
These included:

- A delivery model that relies heavily on volunteers, and a perception of volunteering that may have shifted – both in terms of availability of time and motivations for volunteering
- A belief that volunteers capacity will expand to meet new initiatives, when this infact may cause burnout and a reduction of volunteers
- A belief that an increase in participation is the critical measure of success, when other factors such as quality of experience and diversity of participants might be other important measures
- A one-size fits all mindset to a sport that possibly needs a more tailored approach to meet the interests of different audiences and communities
- An assumption that it is fear of change that is resulting in resistance to change when it may instead be reluctant to change a model that suits the current members
- A potentially outdated mindset among some within the bowls community of what a bowls member and bowls club is
- An assumption that funding models are unlikely to change, when in fact they might
- An assumption that virtual and augmented reality will have little to no impact on bowls.

It would be worth the bowls community building on this discussion.

See Appendix 3 for assumptions typically made within the sport and recreation sector.

Summary of three triangle dimensions



Summary of Action Areas for BNZ

The scenarios highlighted several key action areas BNZ may consider in extending its strategic plan beyond the current 2026 timeframe. When prioritising / developing the plans, it is worth reflecting their potential to have the greatest impact across multiple futures.

Mitigate Challenges

- Clarity and promotion of value proposition and changing environment to gain hearts and minds of bowls constituency who may not be aware of need for bowls to evolve, or are reluctant to change
- Co-create local opportunities to ensure new initiatives align with changing participant and community needs, and attract new and diverse participants
- Improve flexibility of access to facilities to meet people's variable leisure time availability
- Ensure high trust to maintain cohesion and minimise disinformation
- Emphasise financial diversification given threat to existing funding models, including exploring shared ownership and cost models
- Build strong relationships with Councils to position the value of bowls clubs as community connectors, and to counter pressure on lease continuity
- Implement and continue to adapt facilities plan

Capitalise on Opportunity

- Establish brand premium and change narrative, positioning bowls as community connector, that is inclusive and celebrates diversity
- Develop an innovative and forward focused mindset to explore alternatives to traditional delivery model, including models more strongly community based and less regimented - bowls clubs as extension of home
- Adjust space to make it attractive to variety of activities in addition to bowls - a true community hub
- Adjust setting to be more family friendly, e.g less emphasis on the bar
- Replace a one size fits all approach with deliberate local tailoring to meet specific needs of different communities
- Develop digital and social media capability to enhance communication and strengthen community network
- Enhance diversity at governance level across bowls network

Ongoing futures focus for BNZ board

This report provides a framework and some initial futures thinking that SNZ can build from. Most immediately, the report can inform SNZ's strengthen and adapt proposal for Sport NZ. Beyond that, it can help SNZ to develop better strategy through understanding the longer-term issues or challenges shaping its future.

Futures triangle

The future triangle is useful for kickstarting a process of thinking beyond the now. While it is a simple tool, it can support deep discussions about possible futures and be combined with other tools such as scenario planning to increase its complexity and depth. It is particularly useful in identifying the factors that may be holding you back.

Alternative futures

Softball can use the alternative futures with a wider audience to build on the implications, opportunities and challenges identified through this process. This will also assist with promoting greater engagement within the softball community in strategic thinking processes.

Alternatively, Softball could craft different scenarios to extend its thinking beyond the assumed future and generate new insights and a more resilient strategy.

Ongoing Assumptions

The process of evaluating the future strategic context is ongoing. Regularly surfacing and non-judgementally assessing underpinning assumptions is a critical element of this. For example, the workshops identified the assumption that New Zealanders will enjoy increased leisure time. This is unlikely to be true for significant parts of the population.

Appendix 3 provides an example of assumptions that the SNZ Board could adapt for monitoring on a six-monthly basis.

Metrics to Track

Tracking the changing SNZ's operating context is an ongoing task to assess whether the anticipated challenges and opportunities are more/or less likely to eventuate. Given the nature of the scenarios explored, and the deep levels of uncertainties they represent, the SNZ team may consider a limited set of metrics that provide pointers to what the future may hold.

Appendix 4 provides an example of how the SNZ Board might monitor its operating context.



Appendix 1

How Bowls is thinking about future

What would you identify as the critical issue for your organisation in the next 5-10 years?

Positioning

- Repositioning our sport and community, as being a club, facility and sport for ALL New Zealanders - we are more than a sport but a community asset supporting community wellbeing
- The need to ensure our affiliated clubs are in a position to meet the expectations of their community / members / venue users in a professional manner

Growth and appeal

- Recovering the membership numbers hit by Covid-19 and re-establishing confidence in our national and international events
- Continuing to grow the game of Bowls and broaden its appeal to all
- Adapting the offering and delivery to capture the increasing focus of funders and Sport NZ on young people

Focus

- Support to grow the game among Rangatahi, Maori, Pacifica, "Para" and wider Bowls communities
- Building on our high-performance programme
- Club facilities financial viability

If things go well for your organisation what would you expect to see in 5-10 years?

- The number of New Zealanders using our facilities for a wide range of community activities including bowls, doubles
- Growth in numbers driven by non-bowlers of all types seeing our product and how much fun can be had down at their local bowling club
- Increase in Rangatahi and Para community involvement
- Strong club management systems
- High quality playing and social facilities
- Ongoing support and assistance to continue the growth of Rangatahi, physically disabled, visually impaired, deaf and intellectually challenged, Māori, Pacifica and other minority and ethnic group participation

- The establishment of a high-performance and competitive pathway at regional, national and international level to further inspire and grow each of those bowls communities.
- More clubs introducing social bowls events like bowls 3five, to not only grow their membership, but as an opportunity to introduce generations of one whānau to the already very popular short format of the sport which they can either all play together or even against each other.
- Bowls being a key sport that people will want to be part of because their needs will be met from social to elite participation and all levels in between.
- Growing the appeal and numbers playing bowls

What are the factors holding you back from achieving success?

- The number of club people (leaders) motivated and engaged to think about their clubs, beyond playing bowls on a Saturday or Sunday
- COVID-19 has been an interrupter and its toll on clubs is as yet not fully understood, how clubs bounce back has yet to be seen
- Reliance on the motivation of affiliated clubs to achieve outcomes
- Bowls NZ has already demonstrated their commitment to become a more diverse and inclusive organisation.
- The key factor holding back the growth of the sport within those minority communities and at the grass roots level, especially in the smaller centres, is funding and financial support to build capacity and capability to grow bowls participation at a regional and national level
- Historical views of what being a "bowler and part of the bowls community" is.
- Lack of understanding in bowls community about how to support all - this is an issue for all newcomers, let alone the specific challenges faced by para participants.
- Clubs with ageing facilities and volunteer base often without capacity and capability to manage significant facility upgrades or renewals

If things went wrong for your organisation in the next 5-10 years, what has occurred and what would you most worry about?

- Participation numbers drop for the social side of our sport and facilities
- Loss of confidence from bowling community. This would happen if we were out of step with what they wanted and expected. Pushing change is good for the game but change brings on challenges that we need everyone (most) to buy into and bring them with us
- Clubs have not taken advantage of their unique position as a provider of an entertainment / sport for people of any age / gender and with any physical or mental (dis)ability. Without this area being maximised, clubs are at risk of closure due to a lack of new ideas and personnel in the club's decision-making positions.
- If the growth of the game is not supported financially in the community groups identified and at the grassroots level, then the steady decline our bowls community is seeing will continue to the detriment of the smaller centres.
- Bowls communities would default to previous cultural attitudes and practices
- Perpetuation of status quo.
- Important clubs having to shut down due to facility conditions and lack of volunteers (some clubs it may be okay to close and merge with others)

Looking back 10-20 years, what are the key factors that have shaped your organisation to be in its current position?

- A focus on the sport of bowls and events, without spending time and resource looking at how our community and facilities can grow
- The current CEO has created a team of board and staff who want to make changes that increase the visibility / viability of our sport at all levels.
- Growth through innovation e.g. Introduction of short format game to encourage a new breed of player / participant.
- Good communication between players, clubs, regional centres and the national body.
- A desire of the national body to be overtly involved in the advancement and improvement of clubs - administration, facilities, etc.
- I think the culture that existed within the sports governance and clubs was very divisive with separate men's and women's association, clubs and competitions including a lack of support for the new bowlers to the game were the fundamental issues with the bowls community in the past.

- That culture and the attitude of the "old school" bowlers has evolved over time with the amalgamation of the men and women associations and clubs, the introduction of social bowls and greater acceptance and support of new players by clubs.
- Historical social culture of bowls world.
- Historical leadership personnel shaping that culture.
- Lack of valuing and respect for para bowls community.
- Strong financial management providing the ability to adapt and try new initiatives to grow the game, rather than just surviving with BAU

Looking forward, what do you see as the priority actions your organisation should carry out now?

- Communicate and embrace change at the community level. Show through our actions, what success looks like and how it can be achieved
- Our strategic outcomes / goals are relevant and appropriate and need to be communicated to all bowlers throughout the country.
- Working closer with like-minded organisations to deliver programs and events that cater for all bowlers should be progressed further.
- Establishment and good management of programmes to provide the opportunity for all New Zealanders to play and enjoy the game.
- The need to support and grow bowls at the grass roots level (intro to schools and rangatahi with special needs or those that are not normally physically active),
- Growth of specific audiences e.g. Para, VI, physical and deaf, Pacifica and Māori
- Providing more stand alone and integrated events at a regional, national and international level and greater exposure of those events via livestream, social and even mainstream media will only further grow interest and ultimately membership numbers in those communities.
- Develop a recruitment focus especially in understanding participants needs.
- Develop a "Train the Trainer" model to help develop local champions/heroes to support the para bowls community.
- Facility management support to clubs
- Support to club volunteers
- Continue to grow the appeal of the game

Appendix 2

Scenarios

Scenario A

- Governments have abandoned the economic orthodoxies of the late 20th century with policies now firmly focused on ensuring the wellbeing of all. Accordingly, achieving social and environmental goals are given equally high priority to financial results and, in many cases, are prioritised above it. Industries have spent the last few years emphasising automation and robotics to remove low-skill, low-paid jobs to increase productivity.
- New Zealand has embraced a new 'Green Revolution' with an economy focused on circular systems of production aimed at protecting and restoring the environment.
- With the older generation expanding, there has been a corresponding focus on the care economy. The pandemic's legacy and heightened environmental awareness have led people to value relationships and community over consumption-based status.
- Multi-generational living arrangements are now common and ensure mutual support. In addition, councils have embraced the '15 minute city concept' that aims to provide people to access all they need within their immediate neighbourhood.
- People naturally gravitate toward leisure activities regarded as beneficial for individual and community wellbeing, especially if participation costs little. However, financial barriers are relatively few, as the new KiwiPay programme (a modest form of basic income) affords individuals the time and resources to pursue ambitions outside the workplace and support community initiatives.
- People are open to new cultural experiences in their communities that offer variety and engagement. Moreover, governments of all political persuasions are highly supportive of activities that contribute to this goal.
- Some grumble that there is less freedom of choice with products and services deemed harmful being heavily taxed or eliminated. Smoking is no longer an option, and alcohol is very costly. Taxes generally have increased sharply to rebalance the economy as previously debt-laden younger generations have become more politically assertive.

Scenario B

- The wellness business is booming, with consumers looking for products that improve their health, fitness, nutrition, appearance, sleep, and mindfulness.
- Technology plays a large part in this market, with advanced devices that enable individuals to monitor their health proactively and overcome the challenges of ageing. The options range from basic digital tracking of vital signs to sophisticated soft robotics. However, these tailored devices can be expensive and out of reach for many.
- With the increase in the number of people living alone, the pursuit of health and wellbeing is often a solitary and private activity. Single-person households have outpaced the growth of any other household type. This shift continues to pressure the housing market and is overturning the age-based life-stage generalisations of the past. Many in the burgeoning retired community are physically isolated, with younger generations focused on the daily juggle between home and work life.
- In this context, when New Zealanders socialise, they look to mix with people they feel share their identity and values. New arrivals to the country complain that it can often feel unfriendly and difficult to find community.
- Most Kiwis agree that a broader societal wellbeing goal is essential, but there is little agreement over what it means or how to achieve it. For some, it revolves around an 'ethic of leisure' focusing on enjoying life and ensuring personal wellbeing beyond the routine of work. Universal basic income is often advocated alongside this as a means to unlock this opportunity for all. Others (mainly older generations) argue that the focus needs to remain on ensuring well-paying jobs as the primary goal after which individuals can look after themselves.
- The political arguments reflect this division and have become increasingly fragmented and polarised. The range of community needs and lack of understanding between groups means spending on community projects is often highly contested.

Scenario C

- Those in work are working longer hours as, despite the economic downturn, there remains a desperate shortage of workers to support critical sectors. The rural sector, in particular, is under significant pressure as global food demand increases, and NZ remains comparatively unaffected by global crises.
- Given NZ's welcoming reputation and the need for more workers, migration's expanded significantly. The country is, therefore, not just a melting pot of people but also of the range of new community activities new arrivals have introduced and strengthened.
- There is evidence of strong support networks within neighbourhood groups that embrace the diversity of local needs. Practice is highly variable, though, and vulnerable groups (e.g. gender diverse, newly-arrived migrants) tend to gravitate to those areas and activities where they find the most support.
- Another economic downturn led the government to introduce austerity measures that have curtailed social and environmental support programmes. The renewed 'back to basics' economic focus has limited financial resources for some communities and led to a level of benign neglect. The needs of communities are acknowledged, but support is very limited. As a result, expectations of government and private organisations are low, and communities look to each other for mutual support.
- The reliance on local resources has led people to look for community in their physical neighbourhoods and move offline where they can. In addition, the ongoing challenges of cyber-attacks, scams and misinformation have encouraged people to be less digitally reliant and support local offline activities.
- The importance of embracing the local community is particularly relevant for those working long hours with the blurring of work and leisure time an ongoing issue. As the boundary between the two has become extremely difficult to detect, it has become more important for individuals to engage in collective leisure pursuits that take advantage of New Zealand's unique outdoor environment. The demand is for those activities that are available close to home for short periods.

Scenario D

- Automation of jobs is prevalent across industries from agriculture to aged care, as companies look to maintain profit margins in a tough economic market.
- Work has become sporadic for many, typically online and unconstrained by time or place. It's making the distinction between work and leisure increasingly blurred and inhibits the ability to commit to regular activities.
- The demand for jobs is compounded as pressure on government budgets has seen the pension fail to keep pace with inflation. Deteriorating finances has forced an increasing number of people to look for 'un-retirement' and re-enter the workplace to maintain living standards.
- However, global challenges have kept migration high, which is proving to be a source of community friction. Migrants are again being blamed for taking up job opportunities, driving down wages and adding additional pressure to the housing market.
- It's through digital platforms that people now primarily find their community or their 'tribe'. But unfortunately, it's an environment rife with misinformation and mistrust that creates further barriers to understanding between social groups and diverse interests.
- The economic segregation of urban environments has become increasingly extreme as successive governments have been unable to reduce housing demand. In addition, urban density has increased significantly, and pressure on green space is acute. That which remains must demonstrate its utility to a broad section of community needs.
- There has been a steady shift from ownership to access, as those without assets face financial challenges. For example, private ownership of cars has declined as there are more affordable public transport options. This trend has contributed to a reduction in the sense of community as more transient populations struggle to find their place and put roots down.

Appendix 3

Monitoring of assumptions

The following are an example of the assumptions typically made within the sport and recreation sector. A low level of confidence in the accuracy of an assumption should prompt organisations to adjust their planning or develop a 'plan b' (another term for alternative future).

BNZ could use these assumptions as the basis for developing its own assumptions for monitoring. This should occur at least annually. See the Sport NZ future's website for more guidance.

Assumption	Level of Confidence in Accuracy
Sport and active recreation will continue to enjoy strong cross-societal support (social licence)	1 2 3 4 5 6 7 8 9 10
Total funding levels to sport and recreation will not decrease	1 2 3 4 5 6 7 8 9 10
Further development of the Te Tiriti relationship will foster a positive Māori experience of active recreation	1 2 3 4 5 6 7 8 9 10
The level of volunteer support for active recreation and sport will not decline	1 2 3 4 5 6 7 8 9 10
Local government will not decrease its support for sport and recreation	1 2 3 4 5 6 7 8 9 10
Climate impacts will have only a moderate impact on sport and active recreation	1 2 3 4 5 6 7 8 9 10
The cost of sport and active recreation will only be a moderate barrier to participation	1 2 3 4 5 6 7 8 9 10
The sport and recreation sector sufficiently adapts to change to remain viable and relevant	1 2 3 4 5 6 7 8 9 10
Integrity management frameworks will adapt to emergent challenges and maintain public confidence in fair competition	1 2 3 4 5 6 7 8 9 10
Attitudes to elite sporting events will remain positive	1 2 3 4 5 6 7 8 9 10
An ageing population will not change the Government's priorities for active recreation and sport	1 2 3 4 5 6 7 8 9 10
The Summer and Winter Olympic and Paralympic Games retain their global appeal as pinnacle international events	1 2 3 4 5 6 7 8 9 10
Government continues to view national identity/pride as the key rational for investment in elite success	1 2 3 4 5 6 7 8 9 10
Gaming, virtual and augmented reality have little negative impact on participation in sport and recreation	1 2 3 4 5 6 7 8 9 10
Changing working life and leisure patterns do not negatively impact on participation in sport and active recreation	1 2 3 4 5 6 7 8 9 10

Appendix 4

Monitoring disruptors

The BNZ board could introduce a regular monitor of the issues and events it believes could disrupt its planning. The STEEP categorisation is commonly used for this purpose. An indication that a possible disruptor is strengthening may prompt BNZ to seek more information or to consider how it might respond.

Political



- ▲ **COVID-19**
Omicron; ability to recruit/retain; competition access/timing; event impact
- **Gender equity**
Minister's priority; Me Too Movement; D & I survey results
- **Sport activism**
athletes' voice in sport and on social issues
- **Geopolitical**
Potential disruption to world games
- **Mental Health and addiction focus**
Govt release of long-term pathway for mental wellbeing
- ▲ **Crown/Maori relations**
Māori Health Authority as example of empowering of Māori; co-governance trend
- ▲ **Reforms**
Health, alignment opportunities with new authority; Local Govt reforms
- ▲ **Wellbeing**
Recovery and economy dominating

Legal



- ▲ ● **Health and Safety**
Cost of compliance impacts play, physical activity; vaccination complexities
- ▲ ● **Global travel restrictions**
Impacting athlete travel, hosting of events, and international competition
- ▲ ● **Treaty**
Heightened emphasis on honouring
- ▲ ● **Vaccine passports**
Ability to participate, travel, attend events

Social



- ▲ **Gender Diversity and fluidity**
Global move away from male/female only distinction
- ▲ **Changing nature of work**
Lockdowns accelerating/embedding reshaping of work and time for activity
- **Focus on aging population**
Global and national issue as aging population rises as proportion of total
- ▲ **Inequality**
Heightened focus – driven in part of rapidly growing gap between rich and poor
- **Social licence**
Perceived MIQ inequality within sport and with other interests
- **Health**
COVID-19 impacting society on all levels; WHO announcement on poor youth activity levels, exercise prescription
- ▲ **Social resilience**
COVID-19 heightens need for community connection which sport/rec can offer; Polarisation heightened by vaccination of under 12s

Technological



- ▲ **Disruptive technology**
Lockdown accelerating on-line tech; rise of eSports and other virtual and augmented forms entertainment
- **Human enhancement impacts 'level playing field'**
Bionics, bio-engineering, genetic manipulation
- ▲ **Surveillance capitalism**
Use of private data for commercial gain
- **Digital content and multiple devices**
Growth in digital channels (content and news) accessed across multiple devices provides opportunities and challenges for sports; normalising of 'at home' spectating
- ▲ **Credibility of information**
Heightened potential for fake news
- **Digital divide**
Unequal access to technology

Economic



- ▲ **National economy**
Tightening of government purse; heightened cost of living; rising insurance costs
- ▲ **International disruptors**
COVID-19 impact on global economy; additional costs with keeping athletes safe
- ▲ **Workforce**
Heightened competition for skilled labour, given pandemic, pay freeze, cost of living
- ▲ **Sponsorship**
Pandemic impact on event sponsorship; Alcohol sponsorship of sport
- ▲ **Local govt focus/spend**
Focus on three waters and reforms could impact sport/rec focus/spend
- **Discretionary income**
Housing and rent adding to high levels of personal debt; plus inflationary pressures resulting in cost as increased barrier to sport
- ▲ **Proceeds from gambling**
Online gambling review response likely to disrupt

Environmental



- ▲ **Scrutiny on environmental footprint**
COVID-19 may permanently change air travel and attraction of events to NZ
- **Housing density, reduced open spaces and transport**
Auckland, but other metro pressures
- ▲ **Climate Change**
Transition to zero carbon by 2025
- ▲ **Land ownership and lease-hold land**
Access to recreational reserves and high country.

- ▲ Strengthening
- ▼ Weakening
- No change



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