



Bowls North Harbour Needs Assessment Study

*A study to determine the need for an indoor bowling centre
as part of a multi-sport hub.*



NOVEMBER 2023 FINAL



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1.0 The Brief

The brief was to undertake an independent study to see whether there is a need for an indoor bowling centre within the North Harbour Bowls catchment on the preferred site occupied by Sunnybrae Bowling Club. The views expressed in this report are those of the consultant engaged to undertake the study but are informed by the feedback received and the context provided through wider research.

The needs assessment will:

- Refine the vision, objectives and indoor facility purpose.
- Identify location options to meet the priority needs and a preferred location.
- Identify and document the current supply of bowls facilities within the Bowls North Harbour catchment, and information on facilities provided (as well as plans clubs have for future development).
- Identify Bowls North Harbour membership trends and future expectations.
- Define the catchment area, population characteristics and growth trends.
- Define the gap in in facility provision for bowls, including the current, projected and priority needs.
- Establish whether there is a need for an indoor bowls centre within the North Harbour area.

2.0 Disclaimer

Bowls North Harbour Incorporated, Freeman Associates Limited and any other individual or organisation involved in the preparation of this Needs Assessment, are not liable for any loss, injury or damage arising to any organisation or individual from the use of this report. The views expressed in the report are my own based on evidence and analysis and may not represent the views of Bowls North Harbour.

3.0 Exclusions

The following elements will help inform (and be informed by) the needs assessment study (they are not part of the study):

A feasibility study will:

- Assess relevant planning rules and regulations relating to the preferred site/s.
- Assess potential lease opportunities (or impediments to obtain a lease) on the preferred site/s.
- Identify the strengths, weaknesses, opportunities and threats of the proposals.
- Undertake an options analysis considering the proposal for an indoor centre and alternative proposals for strategically positioned covered greens.
- Determine the design brief for the Sunnybrae site based on a likely utilization schedule for club, centre, national and international events.
- Assess opportunities for compatible user groups to access the indoor centre (if this is the preferred option).
- Estimate the capital cost of an indoor centre (and an alternative model for covered greens) and identify whether it is feasible to raise the capital required.
- Prepare an achievable fundraising plan to meet the cost of the project.
- Establish whether it is feasible to build and sustainably operate an indoor bowls centre and/or the alternative option of strategically positioned covered greens.

The Business Model will:

- Define the ownership, governance, management and operating models.
- Specify catchment, target market, occupancy, and pricing models.
- Generate an operational income and expenditure model over a 10-year period.
- Identify and mitigate any ownership, financial, construction and ongoing operations risks.

The Concept Design Phase:

- Concept design refined in response to feasibility and business case findings.
- Concept design sufficient to inform approvals processes e.g. land-owner approval, lease, resource consent.
- Updated preliminary costing (QS).

The Design & Consent Phase:

- Obtain planning/regulatory consents (e.g. local board landowner approval, resource consent and building consents).
- Confirmation of technical requirements to inform detailed design e.g. geotechnical, structural, durability/lifespan, acoustic, access, plant, energy and environmental objectives, etc.
- Detailed design – construction drawings with all necessary engineering input.
- Building consent issued for detailed design.
- Confirm project management approach, construction budget, fundraising and procurement plans, project programme, key project milestones and risks.

The Construction Phase:

- Complete fundraising including contingency
- Procure construction contract
- Complete conditions for drawdown of grant funding
- Undertake construction
- Obtain Code Compliance Certificate
- Develop an asset management plan

4.0 Vision, objectives and indoor facility purpose

The **vision** is for a fit-for-purpose high-quality indoor bowling and multi-sport centre capable of hosting world and national bowls events as well as meeting local needs, to be located on the Sunnybrae Bowling Club site, offering a range of programmes and activities contributing to a growth in interest and participation in the sport of bowls.

The **purpose** is to provide a facility that is fit for purpose and encourage a new generation of bowlers to participate in the sport of bowls in an entertainment style venue contributing to growth of the sport of bowls within the North Harbour catchment.

The objectives are as follows:

- The indoor bowls centre is the 'go to' place on the North Shore for fun, friendly social interactions in a multi-sport environment.
- At least 2,000 members using the facilities on a regular basis.
- The facility generating profit that can be reinvested in facility maintenance and enhancements.

- The venue hosting national events annually, and world bowls events as often as possible.
- A televised Bowls premier league to be based at the indoor centre.

Feedback from clubs indicates support for an indoor bowling centre, but also indicates a wish to explore having covered greens strategically placed within the Bowls North Harbour area (including at Sunnybrae Bowling Club) as an alternative to an indoor bowling centre. Accordingly, the feasibility study can be extended to explore these options.

5.0 Location options and preferred location

The preferred location for an indoor bowling centre, as confirmed through two forums of Bowls North Harbour clubs, is the Sunnybrae Bowling Club site, adjacent to the Event Finder Stadium in 8 Argus Place, Glenfield. This site is preferred because it is centrally located to incorporate several clubs that are within a 10-kilometre radius.

There is sufficient space on this site for an 8 (or 16) rink indoor bowling centre, plus a covered artificial green plus one or two grass greens and a clubroom which can be repurposed.

The land is owned by Auckland Council and leased to the Sunnybrae Bowling Club. The lease with Sunnybrae Bowling Club expires in 2031. The club has 58 carparking spaces allocated to it and there is space on the site to add a further 50 carparks on land adjacent to the Takapuna Golf Club land which is part of A.F. Thomas Park. On occasions when the Event Finder Stadium is not being used the parking is limitless.

Auckland Council requires bowls to give up some land they can repurpose for community use to secure a long-term lease on the Sunnybrae site (either when the lease expires in 1931 or a new lease is issued prior). Auckland Council deems it essential that bowls partners with other community and sports clubs to create a sports hub (potentially croquet, pétanque, archery and Youthtown (archery and Youthtown are already established at A.F. Thomas Park).

The Sunnybrae Bowling Club site suffered minor damage to the artificial green in the 27th January 2023 floods. Surrounding businesses and sports facilities suffered considerable damage but all facilities within the Sunnybrae area are now fully stored and operational. While Auckland Council will carry out mitigation on the Wairau stream this is being treated as a 100-year flood by all other sports venues within the catchment.

6.0 Executive Summary

The need for an indoor bowling centre and/or covered greens within the North Harbour catchment is proven based on evidence which shows that well-managed, modern facilities that are attractive to current members as well as to a new demographic of social and competitive bowlers will help retain current members, attract new people into the sport and significantly address the decline in North Harbour Bowls membership.

A decision to explore development of an indoor bowling centre (or the alternative model of strategically positioned covered greens) signals a transformational change to a modern progressive sport preparing to meet the facility, amenity, and social needs of the next generation of bowlers.

The NZ Sporting Facilities Framework identifies the importance of sporting facilities to help increase participation¹. The Framework identifies the challenge of having facilities throughout New Zealand that are not fit-for-purpose because the sporting code requirements have changed, community standards have changed, or user expectations have changed.

Bowls North Harbour's membership has reduced from 2,132 in 2010 to 1,470 in 2022 consistent with the issues highlighted in the Bowls NZ Facilities Plan, which indicates that the current delivery model is not working and is not growing the sport into new markets because there are no paid staff to promote the sport and bowls doesn't have the covered facilities needed which are proven to attract people to the sport.

Bowls has an ageing population and although membership renewal is occurring in some clubs, this is not sufficient to stem the overall outflow due to death, disability, people moving to retirement villages (and preferring to play bowls at the green provided by the village) and people moving out of Auckland. It is also a consequence of little or no investment in looking towards a new generation of bowlers, including facilities and lights to allow night play to attract a younger demographic of potential bowlers to the sport.

Bowls North Harbour now finds itself at the crossroads, with falling membership over the last 13 years, an ageing membership that is averse to change, clubs that are territorial and focus on their club's survival and have little interest in growth of the sport outside their own club, and clubs unable or unwilling to invest in growth of the sport into new markets. A well-managed indoor bowling centre, and bowling hubs (or clubs) providing covered greens are a critical intervention which would attract new markets and arrest this decline.

Bowls North Harbour has identified the importance of future planning that incorporates a modern fit-for-purpose indoor/outdoor centre that will also incorporate other community and sports activities, aligned with the Sport NZ and Bowls NZ facility strategies. This addresses several opportunities identified by the bowling community to arrest the decline in club membership and achieve growth²:

- Showcases bowls as a modern, progressive, and accessible sporting activity.
- Provides opportunities for more people to play bowl – competitively and socially.
- Available when younger people and those still in the workforce are able to play sport.
- Provides opportunities to introduce new people to the sport.
- Provides an all-weather venue for 12 months of the year.
- Avoids North Harbour events limiting opportunities for clubs to host events.
- Creates a space where clubs can come together to play bowls and socialise.

The preferred site for an indoor bowling centre is occupied by Sunnybrae Bowling Club which is in close geographic proximity to 11 of the 18 bowling clubs affiliated to Bowls North Harbour. The site has many advantages including an existing carpet green over which the indoor centre could be built, two grass greens which would be retained (in future one could be artificial and covered) and a clubroom which could be refurbished to include a commercial kitchen and bistro to meet future needs.

¹ The NZ Sporting Facilities Framework, Sport NZ Strategy Document

² Bowls NZ Facilities Plan 2020-2030

At the draft report stage, given the proven need for an indoor bowling centre, three options were identified for consideration by clubs prior to taking the next step which is a feasibility study:

- (a) Relocation of local clubs to Sunnybrae site to form a new club or a multi-club centre for bowls (with plans for a covered green in the short term).
- (b) Sunnybrae site the home of North Harbour Bowls with plans for a covered green in the short-term and an indoor centre in the long-term. Possible merger of Sunnybrae with another club/s also located at Sunnybrae Bowling Club.
- (c) An existing club sells their land, moves to Sunnybrae and develops a multi-sport hub with indoor, outdoor and covered greens (Takapuna, Birkenhead and Northcote own their own land).

Member clubs were asked to indicate, based on the three options provided, whether they supported moving to the next stage of undertaking a feasibility study. Six bowling clubs support moving to the feasibility study stage, and seven bowling clubs do not support moving to the feasibility study stage (but three support a plan to strategically position covered bowling greens including the Sunnybrae site).

Those who support moving to the feasibility stage supported this view with statements as follows:

- The potential opportunity for a world class bowls facility in the North Harbour region.
- A pristine facility would attract people to bowls, particularly those in the work force.
- Sunnybrae is a good option and need a full indoor centre.
- What is proposed is good for bowls in the future.

Those clubs that do not support moving to the feasibility stage supported this view with statements as follows:

- Should consider other options such as covered greens as an alternative to an indoor centre.
- Other clubs moving forward with proposals for covered greens (Orewa, Manly, Takapuna) – how many do we need?
- Concerned other clubs might be called on to fund an indoor centre but support increasing the number of covered greens at three strategically located clubs within the catchment as an alternative.
- Difficult to merge clubs and enable them to retain their own identity and facilities and assets.
- Focussing on our own canopy project and concern Sunnybrae is in a flood zone.
- No benefit to our club.
- Our clubs are outside the operational area and any facility would not directly affect them.
- Concern about the cost of a feasibility study and believe funds should be directed to bowling activities.

The responses create an opportunity to broaden the scope of the feasibility study to include the proposed indoor bowling centre, but also look at an alternative model of strategically positioned covered greens, with Orewa (second green), Manly, Sunnybrae and Hobsonville suggested as preferred locations.

An opportunity to develop the Sunnybrae site is unlikely to come around again. If the Sunnybrae site is lost there are few or no alternative sites on which to locate an indoor bowling centre, a covered green and a grass green on a single location. The feasibility study will assess whether this option is viable while also exploring the alternative option of covered greens at strategically positioned locations (including Sunnybrae).

7.0 Bowls North Harbour clubs

Full playing membership numbers within the North Harbour Bowls Centre have declined from 2,132 in 2010 to 1,470 in 2021. The decline can be directly attributable to the sport not responding to changing customer expectations and lifestyles and the need for fit-for-purpose facilities that enable bowls to be offered to a younger demographic and people in the workforce that can play at night on an all-year-round basis.

In 2022 Bowls North Harbour recorded 177 first year bowlers (the highest number of first year bowlers since records from 201) and an overall increase of 88 Bowls North Harbour full playing members – insufficient to turn the tide but a good indication of future potential. This shows there is a strong interest in playing bowls and joining a club is still an attractive option.

There were only 4 student full playing members in 2022 which demonstrates, given all other sports that are attracting young people, that either bowls is not seen as an option for this demographic, or there are no products on offer that would attract young people to play bowl within the North Harbour area (facilities and scheduling), or they don't know that bowls is an option they could choose (lack of marketing).

The average number of members per club within the Bowls North Harbour catchment is 77.37, which aligns with Bowls New Zealand figures, noting that in 2022 there were 467 clubs with a membership of 35,218 or an average of 75.4 members per club³.

In 2022 ten clubs in the Bowls North Harbour catchment experienced growth (most in single digits) and nine clubs had fewer members in 2022 than in 2021. There was significant growth in casual and twilight bowls in 2022, which again shows that there is a strong interest from a younger demographic in playing bowls. Orewa recorded the biggest increase in full members and in casual participation in 2022 demonstrating that where a fit for purpose facility is provided, people will be attracted to play bowls.

Membership growth and retention can be reversed, and the sport can attract a younger demographic as well as meet the needs of current members (Rangatahi as well as people in the 25 – 50-year bracket), if indoor and/or covered bowl greens are provided in a multisport environment providing social facilities (café and bar).

³ Bowls NZ Facilities Plan 2020-2030

Bowling clubs within the North Harbour Bowls catchment have combined fixed assets of \$24.4 million for the 2022 financial year⁴. The clubs are holding current assets (including cash, investments and saleable stock on hand) of \$3 million. In 2022 there was an annual income of \$2.3 million and expenditure of \$2 million, leaving a surplus of \$300,000. Bowling clubs make a significant contribution to the local economy as well as providing social enterprise.

While bowling clubs within the Bowls North Harbour catchment are well managed and meeting needs of current members, most clubs struggle with a focus and commitment to future growth – they do not have the resources to employ staff and struggle to provide sufficient volunteers with the time, energy and commitment to engage with the non-bowling community who are potential new members and provide an important revenue source.

There were nineteen clubs within the Bowls North Harbour Centre from Omaha in the North of Auckland to Stanley Point in the South⁵. Following is information on the clubs, the number of members as at 31st December 2022, the number and type of bowling greens:

Club	Full Playing Members	Limited playing members*	Student members	Natural Grass Greens	Artificial Greens	Total Greens	Land ownership
Beach Haven	42	0	0	1	0	1	Leased
Belmont Park	30	1	0	0	1	1	Leased
Birkenhead	116	2	0	2	0	2	Owned
Browns Bay	83	20	1	3	1	4	Owned
Helensville	49	11	1	1	1	2	Owned
Hobsonville	100	0	0	0	2	2	Leased
Mahurangi E.	54	33	0	0	2	2	Leased
Mairangi Bay	123	29	0	2	1	3	Leased
Manly	101	26	0	1	1	2	Leased
Milford	61	0	1	2	0	2	Leased
Northcote	56	5	0	1.5	0	1.5	Owned
Omaha	80	0	0	0	1	1	Owned
Orewa	177	150	1	1	2	3	Leased
Riverhead	38	2	0	1	0	1	Leased
Stanley	12	0	0	1	0	1	Owned
Sunnybrae	46	0	0	2	1	3	Leased
Takapuna	173	0	0	1	1	2	Owned
Waimauku	44	4	0	0	1	1	Leased
Warkworth	81	0	0	1	1	2	Owned
TOTAL	1,380	186	4	20.5	16	36.5	

⁴ Bowls Financial Analysis Appendix A

⁵ Bowls North Harbour Annual Report to 30th April 2022

To be successful and ensure long-term sustainability, a bowling club needs the following:

- Strong leadership backed up by a Board or Committee with a commitment to the future.
- A strategic plan setting out the vision and strategies for success and a commitment and the resources (including staff resources) to achieve them.
- A team of committed and passionate volunteers supporting delivery of the strategic plan (with support from paid staff).
- The ability to generate sufficient revenue from all sources (membership, corporate events, bar, corporate bowls programmes) to meet annual operating costs and invest in a sustainable future.
- Quality facilities – good playing surfaces – grass and carpet, well-maintained clubrooms and ideally a covered green.
- Coaches for beginners, year 1 – 5s, developing and high-performance bowlers.
- Sufficient members to enable competitive club championship events.
- A clear pathway for players from beginners through to centre championships and beyond.
- A focus and commitment to growth at all levels including Rangatahi, corporate and social bowls programmes that are accessible to the community.
- Technical ability to adopt Bowls Hub and move to an online system for managing club events.
- The ability to communicate effectively with members and supporters through traditional means and importantly through social media.

Clubs are working very hard to be successful, but all clubs are totally reliant on volunteers having the capacity (time) and capability (skills) to deliver not only the bowls club programme but also programmes for social bowlers who may never become members of the club. Bowls NZ advocates for a shift to professional management of clubs and facilities to promote and deliver facility usage⁶

7.1 Bowls North Harbour Strategic Plan

The broad role of Bowls North Harbour is to lead the development, growth, and delivery of bowls within the catchment and provide leadership on issues. Bowls North Harbour is providing leadership on the indoor centre proposal aligned with its identified value of ‘providing a positive vision for the sport and promoting change where needed’.⁷

Bowls North Harbour has a difficult but very important role to play in leading discussions around investment in indoor and/or covered greens to reinvigorate the sport and generate growth aligned with their strategic plan.

The latest strategic plan is for the 2017-2020 period (the Strategic Plan will be updated in 2024). The Strategic Plan identifies several drivers for change as follows:

- Fast moving technology and communication methods.
- Declining administrative depth and strength in some clubs.
- Progressively declining traditional membership numbers.
- An ageing membership (impacting on volunteer availability).
- Reduced revenue streams from sponsors and funders.

⁶ Bowls NZ Facilities Plan 2020-2023, p3

⁷ Bowls North Harbour Strategic and Operations Plan 2017 - 2020

- Competition from other sports.
- A new generation of players seeking a sporting/entertainment experience on a 'pay for play' basis in a short time frame – unwilling in most cases to commit to traditional membership, formal dress codes and historical playing times and formats.

The Strategic Plan identifies several initiatives to address the drivers for change including club rationalisation with discussion on amalgamation of clubs as necessary. Bowls North Harbour has an important role to play in leading these discussions, but as bowling clubs are incorporated societies the decision lies with the members who, experience shows, are reluctant to make changes even when the evidence is very clear that amalgamation would be beneficial for the club and the sport of bowls.

Bowls North Harbour and its affiliated clubs have identified that inclement weather causes significant disruption to not only Bowls North Harbour championship events, but also to the ability of clubs to plan and deliver, on an uninterrupted basis, their own championship events. While they are searching for solutions e.g. reducing the number of events, an indoor stadium or covered greene would enable Bowls North Harbour and clubs to increase the range of events provided.

7.2 Bowls North Harbour Facility Planning

Bowls as a sport has been slow to respond to changes in facility provision in response to changes in code requirements, community standards or user expectations. The decline in membership and the growth in casual participation in bowls has been well documented over many years indicating that bowls is an enjoyable, social activity that people want to engage with⁸. Providing quality, well managed covered facilities provide the only opportunity that has been proven to increase the uptake in bowls membership and participation⁹.

In a worst-case scenario Bowls North Harbour could lose several greens over the next 5 – 10 years due to club failures caused by a range of factors including facilities that are not attractive to the community and an inability to focus on future needs of the sport. They could end up with around 12-15 greens by default, instead of achieving planned mergers and amalgamations that enhance and do not damage the sport of bowls.

Clubs that wish to provide facilities only for people who are available to play weekdays and weekends face an uncertain future (acknowledging that clubs in small rural centres may continue to thrive as a hub of their community).

Clubs that collaboratively engage in a plan to provide a network of covered greens will ensure a positive future for the sport, with shelter from the sun in the summer and shelter from the rain in winter, and more opportunities for more people to play bowls including current bowlers and the next generation of players.

⁸ Bowls NZ Freeman Report, 2009

⁹ Orewa Bowling Club membership and casual participation statistics

If clubs take collective action to invest in covered greens and there is a determination to make decisions in the best interests of the sport (rather than what is best for survival of individual clubs) then an indoor bowling centre at Sunnybrae or the alternative of a network of covered facilities will become a reality.

If change is not made, including providing covered and indoor facilities to help retain and attract new members and participants to the sport then the sport will continue to decline, the image of the sport as a game not attractive to young people will not change, and more clubs will become unsustainable and close.

7.3 Bowls North Harbour Club Facility Developments

There are two confirmed facility developments likely to be completed within the next two-three years and four proposed developments.

Orewa Bowling Club is planning a second roof over one of their greens in response to the huge success of their first roofed green. The first roofed green led to a significant increase in members, and introduction of a youth development programme involving 24 students from Orewa College on an 8-week NZQA course in Sports Leadership with Bowls as the subject.

Browns Bay Bowling Club is proposing rezoning a portion of the club's surplus land to Residential: Mixed Housing Urban Zone to secure its financial future and enable them to undertake ongoing development and upgrading of its facilities. This includes a covered or indoor green which will enable the club to further develop a community hub incorporating the Browns Bay Bowling Club, East Coast Bays RSA, Browns Bay Fishing Club and other interested parties.

Bowls Warkworth floodlit their artificial green some time ago, enabling the club to extend its programmes, and play night bowls all year-round weather permitting. There is a possibility this club will also explore an option of a covered green in future and, as it owns its land, may consider selling and moving to an alternative site on public land.

Manly Bowling Club has received funding from Auckland Council to undertake a feasibility study with a view to renovating their clubroom to create a community hub for bowls, tennis and yachting and this may include a covered green.

Takapuna Bowling Club will explore the feasibility of providing a covered green, subject to obtaining Resource Consent which they have applied for.

Milford Bowling Club is exploring the feasibility of providing an artificial green to enable them to play all year round.

Funders will have an expectation that application for grant funding are backed up by a comprehensive assessment that demonstrates the need for an indoor centre and/or the alternative of a network of covered facilities.

7.4 Bowls North Harbour Facility Gap Analysis

Bowls was established in New Zealand in 1860 and bowling clubs were the social centre of every community at a time when people lived, worked and socialised locally as transport options were limited. There have been few facility innovations since that time. The move to carpet greens was initially met with strong resistance (and is still resisted by some today). The move to covered and indoor greens for bowls is a more recent innovation, but one that is essential if bowls is to progress as a sport.

If you Build it They Will Come (Field of Dreams, 1989) is a catch cry that is often used to demonstrate that fit for purpose, state of the art facilities will attract participants. Sport NZ emphasise the importance of fit-for-purpose facilities to encourage and support growth of participation in sport.

Hockey is a good example. Once played outdoors on often muddy fields and subject to seasonal disruptions, in the early 1980's hockey moved onto astroturf surfaces, and the game was attractive to more people, both social and competitive hockey grew correspondingly, NZ achieved international success, and the profile and commercial investment in the sport increased.

The need for an indoor bowls centre or the alternative of strategically positioned covered greens cannot be established based on traditional methodologies such as taking the current supply of facilities and current membership then calculating the number of members per green to provide for growth, thus enabling a calculation of the shortage or over-supply of greens.

This is because the need for an indoor bowls centre and covered greens is based on an expected significant increase in demand to be generated by providing fit-for-purpose facilities that are aimed at creating a new target market of younger, social bowlers and people in the workforce, in addition to catering for competitive and social bowlers who are currently playing on grass and artificial greens.

However, this is a methodology that can be used to estimate how many greens are likely needed within the Bowls North Harbour catchment. Taking an average figure of 80 players per green (an average of the economic figure for carpet and grass greens) an estimate can be made that 17 greens are needed compared to the current supply of 36.5 greens (an oversupply of 19.5 greens).

This does not take account of covered carpet greens and an indoor bowls centre where more intensive use can be made of the space provided. It is likely that grass greens can only be used for 12 – 15 hours per week without causing damage. Carpet greens can be used without limits (although need replacing every 10-15 years). Providing covered greens extends the number of hours per week available to use the facilities (assume 9 – 9am daily or 96 hours per week).

New Zealand is somewhat unique on a global basis as bowls is identified as a game for older people. This is dictated by the greens being outdoors (with no floodlights for night play) for a very limited summer season. A changing social environment means younger people, especially those with young families, are not prepared to commit their weekends to bowls.

The gap in facility provision within the North Harbour catchment is indicated by only one club having a covered facility and there being no indoor bowling centre to meet the needs of a modern, progressive sport. To 'keep up' with changes occurring nation-wide, and address the declining membership, the gap in provision of covered greens and an indoor bowling centre needs to be addressed to:

- Showcase bowls as a modern, progressive, and accessible sporting activity.
- Provides opportunities for more people to play bowl – competitively and socially.
- Provide facilities which are available when younger people are available to play sport.
- Provide opportunities to introduce new people to the sport.
- Provide all-weather venues for 12 months of the year.

It is highly likely, without an intervention such as an indoor bowling centre and/or strategically positioned covered greens, that the sport will continue to decline in numbers, more clubs will close, the image and reality of the sport as a game for old people in New Zealand will not change, and opportunities will be lost to be a modern and progressive sport that is attractive to people of all ages and abilities.

7.5 Bowls North Harbour Catchment area and demographics

The immediate catchment area for Bowls North Harbour is defined as Stanley Bowling Club, Devonport in the south (11 kilometres to Sunnybrae Bowling Club), Orewa Bowling Club in the north (25.2 kilometres to Sunnybrae Bowling Club), Browns Bay Bowling Club in the east (10.2 kilometres from Sunnybrae Bowling Club) and Beach Haven Bowling Club in the west (7.2 kilometres from Sunnybrae Bowling Club). This approximately aligns with the catchment areas of Devonport-Takapuna, Hibiscus-Bays and Kaipatiki Local Boards.

The 2018 census results show the following population growth for the three local board areas within the catchment:

Local Board	2018 Population	Population increase 2013-2018	Median Age	Ethnic diversity
Devonport-Takapuna	57,975	4.5%	39.4	European 69.3% Asian 26.3% Maori 5.5% Pacific 2.5%
Hibiscus and Bays	104,010	15.8%	41.2	European 80.8% Asian 16.0% 6.5% Maori 2.1% Pacific
Kaipatiki	88,269	7.0%	34.8	European 58.5% 32.9% Asian 8.7% Maori 6.1% Pacific
Total	250,254	9.1%	38.47	

Population growth and cultural diversity create opportunities for increased bowls membership and participation, provided the right facilities are provided to attract the target market which is aligned with the median age group for this catchment.

8.0 The Need for an Indoor Bowling Centre

8.1 Sport NZ Facilities Framework

Sport NZ is responsible for ensuring there are more kids playing and enjoying sport, more adults participating and getting involved and more Kiwi winners on the world stage¹⁰. The Framework report highlights the importance of sporting facilities in increasing participation. They believe that if the right sporting facilities were provided, then more New Zealanders would be enabled and encouraged to take part in sport.

Sport NZ say there are many challenges to overcome.

Gaps and duplications:

Sport NZ says that when clubs and codes make decisions in isolation, we end up with too many of one kind of facility and not enough of another. It has long been identified that there are too many bowling

¹⁰ The New Zealand Sporting Facilities Framework, a strategy report from Sport NZ

clubs, and each is fighting for its own survival, rather than making collaborative decisions as to what is in the best interests of the sport. We need to understand how many clubs we need, how many greens (grass and artificial) we need and whether an indoor bowling centre has a place in this mix.

Facilities that are not fit-for-purpose:

Sport NZ says that for one reason or another we end up with facilities that are no longer suitable. The first bowling club in New Zealand opened in 1861. Introduction of artificial greens was an important innovation. Covered or indoor bowling centres are next generation innovations that are important for the future of bowls as they enable a new demographic to access bowls.

Facilities we cannot afford:

Sport NZ says that while often communities find the money to build a facility, they struggle with ongoing operational and maintenance costs. Many bowling clubs reach a point where they are unable to generate sufficient money to maintain and improve their clubrooms and greens and make them attractive to the community.

8.2 Bowls New Zealand Facility Plan

Bowls NZ identified that a large percentage of lawn bowlers in the future are likely to be consumers who play the game casually, and in shorter formats. Attracting a younger demographic to play bowls, depends on providing opportunities to play bowls at night, during the week or at weekends, in an all-weather environment, all year round to meet those future expectations¹¹.

The Bowls NZ Facility Plan identifies that new and/or upgraded facilities enhance the ability of the club to attract new members, participants, and community groups¹². They identify providing an all-year-round covered (enclosed) bowls playing surface should be considered in an enhanced offering to local communities and notes that most bowling clubs are no longer attractive to 21st century consumers who have choices about how they spend their entertainment dollar.

In 2022 Bowls NZ recorded 476 clubs with a membership of 35,218 and 76,218 casual participants (Covid-19 impacted) with an increase in casual participation reflecting the ever-changing demographic of New Zealanders accessing the game of bowls¹³.

The Plan goes on to say that the 'increase in casual participation reflects the every-changing demographic of New Zealanders accessing our sport'¹⁴. They say that bowling clubs 'need to ensure they are set up to embrace this change and provide the 'new bowlers' a product and service that reflects expectations of our communities in 2022 and beyond'.

Bowls NZ say that bowling clubs need to ensure they are set up to embrace a change to casual participation and to create partnerships and share facilities with other community activities, and that the key to achieving this is moving towards paid facility administration. They say a professional facility management solution will provide the club with a person who can act as the face of the facility in the eyes of new customers.

¹¹ Bowls NZ Facilities Plan 2020-2030

¹² Bowls NZ Facilities Plan 2020-2030, p2

¹³ Bowls NZ Facilities Plan 2020-2030, p2

¹⁴ Bowls NZ Facilities Plan 2020-2030, p2

The reality for most clubs is they cannot afford to employ facility administrators, and get caught in a spiral of reducing membership, and an increased number of tired, burnt-out volunteers leading to further reduction in membership and a focus on survival at all costs.

Bowls NZ encourages bowling clubs (and centres) to create covered playing facilities as a growth opportunity. They identify the following location that have or are building a full sized (8 rink) covered playing facility:

- Invercargill (Waverly Bowls Club)
- Dunedin (Dunedin Lawn Bowls Stadium)
- Wellington (Naenae Bowls Club)
- Hawkes Bay (Bowls Hastings)
- Pukekohe (Pukekohe Cosmopolitan Club)

Three clubs have fully enclosed stadiums with less than 8 rinks:

- Central Otago (Wanaka Bowls Club) and Central Otago (Clyde Bowls Club)
- New Plymouth (Paratutu Bowls Club)

Five clubs now have a roof over a green:

- Orewa Bowling Club
- New Lynn Bowling Club
- Remuera Bowling Club
- Royal Oak Bowling Club

Auckland Bowls has responded to the Bowls NZ Facilities plan by incorporating in their strategic plan an initiative to have strategically aligned locations for covered greens across the Auckland Bowls region. Covered greens are provided at New Lynn, Remuera and Royal Oak, with a plan to provide a covered green at Papatoetoe and discussions under way with Council about a covered green at Howick.

8.3 World Bowls Federation

World Bowls has 57 member nations including members within the Oceania, Asian, European, African and Americas regions. All these population groups are resident in New Zealand and have the potential, with the right facilities provided, to engage in bowls programmes more widely at all levels including social and competitive bowls.

World Bowls is placing an increasing emphasis on outdoor bowls played indoors as a future growth strategy. Introduction of the 2023 World Bowls Indoor Championships is an example of a sport on the move to capture a new generation of people interested in playing a non-contact sport suitable for all ages and abilities including Para Bowls.

World Bowls are leading a revolution in bowls, with the launch of the World Bowls Indoor Championship held in Australia in January 2023 where 35 nations competed involving 33 men and 29 women. While traditionally the game of bowls has been played outdoors (and this will continue), bringing the game indoors resolves the issues around climate change, weather conditions, a shortage of greenkeepers, environmental concerns around the use of chemicals and the cost of maintaining the greens. It positions the sport as a modern, progressive game for a wide range of participants to enjoy.

The Bowls Premier League was a forerunner to the World Bowls Indoor Championship. The Bowls Premier League is a biannual bowls competition involving teams from around Australia and includes a team from New Zealand. The competition was founded in 2013 by Bowls Australia. The first New Zealand edition of the competition was held at the Naenae Bowling Club, Lower Hutt in March 2017 with prize money of \$100,000 on offer.

The Premier League is a 'made for television' event, with Fox Sport in Australia and Sky Sport in New Zealand involved as well as digital streaming of all games. This has huge potential to attract new participants to the sport, with modern, progressive marketing appealing to a new demographic of players. An indoor bowling centre at Sunnybrae could in future be incorporated into the Premier League circuit.

World Bowls embrace men's and women's competitions and Para-athletes who compete at world championships and Commonwealth Games. In 2022 North Harbour Bowls Centre's Graham Skellern participated in the Commonwealth Games in Birmingham, UK as a Para-athlete, while Selina Goddard at aged 28 attended her second Commonwealth Games in Birmingham and won two bronze medals.

In many countries bowls is popular with younger people, with large school programmes particularly in Australia. At the recent Commonwealth Games in Birmingham, an estimated 80% of competing bowlers were aged under 30 years of age. Bronze medal bowler Selina Goddard from the Bowls North Harbour Centre, along with other members of the women's team, is indication of future potential for growth of the game within this demographic.

This is hugely relevant for the proposal for an indoor bowls centre and/or covered greens within the Bowls North Harbour region because the future of the game is changing, there are opportunities for younger people to become involved in playing bowls and this is an opportunity to respond to the changes in a positive way.

9.0 Conclusions

Feedback from club membership indicates a strong interest in either supporting a feasibility study into provision of an indoor bowling centre at the Sunnybrae Bowling Club site or exploring an opportunity for strategically placed covered bowling centres within the North Harbour catchment.

A feasibility study into both those options, or a combination of those options, will give Bowls North Harbour a blue print for future developments, creating an opportunity to achieve growth of the sport into new markets and address the decline in membership experienced over the last 13 years.

Having fewer, professionally managed venues for bowls, will help ensure that facilities are well managed and the game of bowls is marketed in ways that ensure new programmes and services are provided to attract new players.

Both the needs assessment and feasibility study can also be used to support grant applications for future developments, particularly when multiple developments are being promoted around the same time, and funders are looking for guidance from the sport to determine priorities.