

National Facilities Strategy



Prepared for

Hockey New Zealand

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Report Disclaimer

In preparing this report it has been necessary to make a number of assumptions on the basis of the information supplied to the Strategic Leisure (NZ) Limited and Horwath HTL Limited in the course of investigations. The information contained in this paper been conscientiously prepared based on consultation feedback, an understanding of trends in the leisure sector, and in particular trends in recreation facility provision.

The authors did not carry out an audit or verification of the information supplied during the preparation of this report, unless otherwise stated in the report. Whilst due care was taken during enquiries, Strategic Leisure (NZ) Limited and Horwath HTL Limited do not take any responsibility for any errors nor mis-statements in the report arising from information supplied to the author during the preparation of this report.

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1. Introduction

This report presents the National Facilities Strategy for Hockey New Zealand (HNZ). The National Facilities Strategy sits below the Hockey Strategy for New Zealand (and “Whole of Sport” Plan). It is now entering a phase of consultation with input sought from the HNZ Board and Associations. The Strategy will also be presented to SPARC who funded its development.

The Strategy has been developed with the invaluable assistance of the Project Working Party (PWP). Members of the PWP were selected to provide different perspectives: Hilary Poole (HNZ CEO), Hilary Stubbs (Youth Council Chair), Sharon Williamson (Trustee of North Harbour Turf Trust and Chair of Harbour Hockey Association), Nicola Connell (HNZ Tournament & Events), Neil Edmundson (Association Board), Tim Shannahan (Association CEO), Dion Gosling (New Zealand Hockey Players Association), David Allan and James Parkinson (consultants).

A survey of Associations was undertaken to gain key data to assist with clarifying the current situation and in development of the National Facilities Strategy.

Key intentions of the Strategy are to:

- Provide an overview of the strategy’s purpose, objectives and scope.
- Provide an overview of HNZ and the current state of hockey facilities in New Zealand.
- Provide specifications of facility requirements to host the various levels of HNZ events in a matrix format and specifying minimum standards for premium national domestic tournaments
- Update the inventory of existing hockey facilities in New Zealand capable of use for HNZ events and high performance training.
- Provide an evidence-based assessment of future hockey facility needs for HNZ events and growth in participation.
- Analyse the ‘gap’ between current hockey facilities and current and future needs for hockey participation, HNZ events and high performance training
- Provide a prioritised list of recommendations for the development of hockey facilities to meet current and future needs for participation, HNZ events and high performance training.
- Enable relevant territorial authorities to:
 - Be aware of the facility needs of Hockey during the 2012 LTTCP process
 - Be aware of benefits of hosting HNZ events and high performance activities including economic aspects
 - Ensure new hockey facilities plus upgrades and renewals to existing hockey facilities (where practical) comply with the appropriate HNZ specifications and optimise utilisation

2. Current Situation

This section provides a brief overview of the current situation for Hockey from a facilities perspective.

2.1. Player Numbers

As hockey in New Zealand continues to evolve as an all-year sport, the tracking of player numbers and participation trends is becoming increasingly difficult. This is primarily due to the fact that only winter players are affiliated to Hockey New Zealand through their local Associations. Summer hockey players, by comparison, tend to participate on a “pay for play” basis. While this is often through the local Association, the players are not registered with Hockey New Zealand making it difficult to accurately track participation numbers.

Hockey New Zealand had 42,894 registered winter hockey players in 2009. This was effectively the same number of players as in 2008 (42,890) and slightly below the 43,345 registered players in 2007. Between 2001 and 2009 player numbers have increased 11.5% but the majority of this growth occurred between 2001 and 2003 when player numbers increased 6.6%.

Based on information obtained through the Association survey and data held by Hockey New Zealand (in relation to the Associations that did not complete the survey), it is estimated that there are currently 13,200 summer hockey players throughout the country. The relative strength of summer hockey differs significantly across the country.

Hockey has aspirations to become an all year round sport. In terms of turf provision the current differential between winter and summer numbers means winter numbers are likely to drive peak demand for the planning period covered by the Strategy.

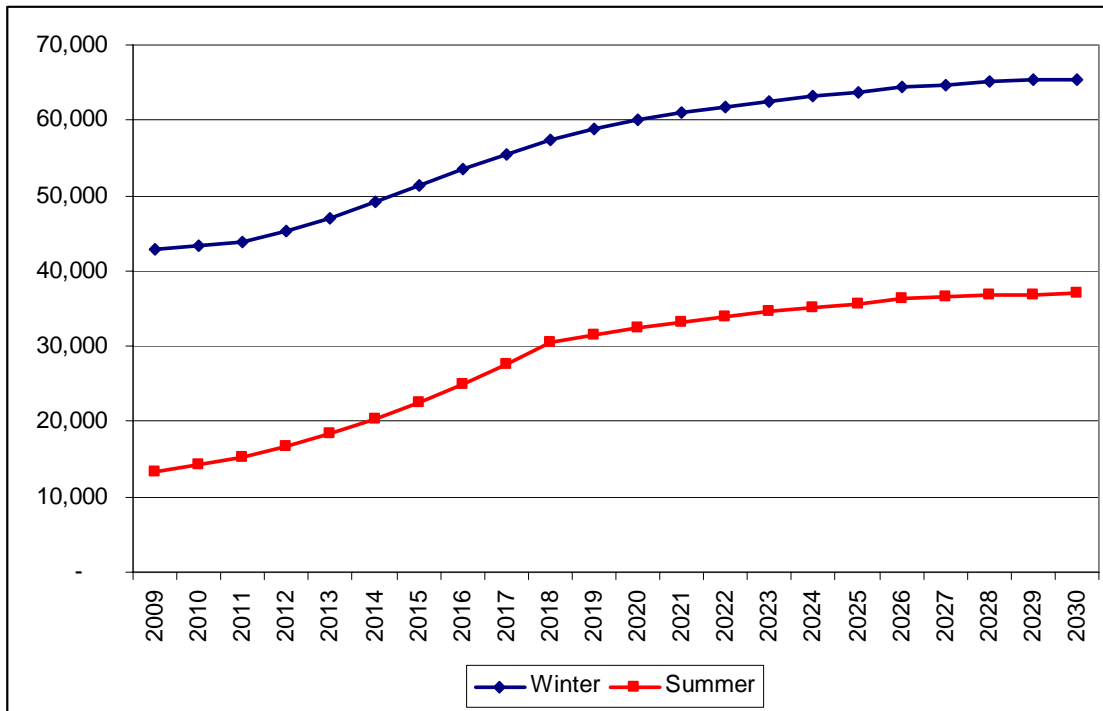
2.2. Growth Outlook

A low population growth outlook of 0.8% per annum, combined with a trend towards an older population and increasing competition from both formal and informal leisure activity provides a challenging backdrop for any established sport to achieve strong growth in participation levels.

In 2009 there were 42,894 winter hockey players. Allowing for average annual growth of 2%, there will be 65,500 players by 2030.

The strongest rate of growth is projected in the period from 2011 to 2020, as a result of the initiatives identified in the whole of sport strategy. It is estimated there will be 60,100 players by 2020, which represents average annual growth over the next 10 years of 3.1%.

Figure 1: Projected Hockey Player Numbers



There are currently 13,400 summer hockey players, which represents 31% of winter numbers. The current level of participation varies significantly across the country with several Associations having summer numbers in excess of 50% of their winter numbers. Other Associations currently have no summer hockey leagues. Modelling has allowed for overall participation in summer hockey to lift from the current 31% of winter participation to 54% by 2020 and 57% by 2030 with participation levels being higher in larger Associations and lower in smaller volunteer-based Associations.

The definition of a summer player is a fee paying participant in one or several summer hockey competition modules. Summer player numbers equate to the number of fee paying participants competing in summer competition modules.

This scenario envisages 37,000 summer hockey players by 2030 and 32,400 by 2020.

It should be noted that in the future hockey may well reach a point where hockey activity is relatively constant through out 10-11 months of the year. It is anticipated that this will flatten demand rather than accentuate the current winter peak in demand.

2.3. Turf Access

Artificial turf provision has increased markedly over the last six years, with the number of artificial turfs increasing 38% from 47 in 2003 to 65 in 2009.¹ Despite this growth, there are currently significant discrepancies in the level of turf provision throughout the country.

¹ Based on 2003 data provided by HNZ and data sourced from the 2010 Association survey and by HNZ in 2009.

Association	Park			School				Total
	Water	Wet-Dressed	Sand	Water	Wet-Dressed	Sand	Other	
Auckland	2	0	0	2	2	0	1	7
Bay of Plenty	4	0	0	0	0	0		4
Buller	0	0	0	0	0	0		0
Canterbury	2	1	0	0	0	0	5	8
Central Hawkes Bay	0	0	0	0	0	0		0
Central Otago	0	0	1	0	0	0		1
Counties Manukau	1	0	0	0	0	0		1
Eastern	1	0	1	0	0	0		2
Hawkes Bay	2	0	0	0	0	0		2
Horowhenua	1	0	0	0	0	0		1
Invercargill	2	0	0	0	0	0		2
Malvern	0	0	0	0	0	0		0
Manawatu	2	0	0	0	0	1		3
Marlborough	1	0	0	0	0	0		1
Mid Canterbury	1	0	0	0	0	0		1
Nelson	1	0	1	0	0	0		2
North Harbour	3	0	1	2	0	0		6
North Otago	1	0	0	0	0	0		1
Northland	2	1	0	0	0	0		3
Otago	2	0	0	0	0	0		2
Poverty Bay	0	0	0	0	0	0		0
Rangitikei	0	0	0	0	0	0		0
Ruahine-Dannevirke	0	0	0	0	0	0		0
South Canterbury	1	1	0	0	0	0		2
Taranaki	1	0	1	0	0	0		2
Tauranga	1	0	1	0	1	1		4
Thames Valley	0	1	0	0	0	0		1
Waikato	2	0	0	1	1	1		5
Wairarapa	1	1	0	0	0	0		2
Wanganui	0	1	0	0	0	0		1
Wellington	2	2	0	0	0	0		4
West Coast	0	0	1	0	0	0		1
TOTAL	36	8	7	5	4	3	6	69

Other: includes half turfs, multi-use turfs, and other hard surface facilities utilised by Associations for **matches**.

Over the last few years, the FIH Equipment Committee has been working towards specifying a water-free synthetic turf for top level hockey. Meetings were held with several manufacturers to ascertain the current status of this initiative and identify any implications in relation to turf installations in New Zealand.

Most of the major turf manufacturers are currently actively engaged in research and development to develop a dry turf that is appropriate for top level hockey. These efforts are being frustrated by the absence of test criteria for turf resistance and skin abrasion. With current technologies manufacturers are finding that it is not possible to achieve the same ball roll on dry turf that is possible with a water turf.

The general consensus is that it will be some years before dry surfaces are of sufficient quality to replace water turfs at international level. It may even require some level of compromise on the part of players in relation to ball roll and abrasion if water turfs are to be replaced.

In the interim, a number of manufacturers are also developing new generation water turfs that use less water (up to 40% less) to achieve the same playing qualities of older generation water turfs. These turfs therefore provide some conservation benefit and operational efficiencies while preserving playing quality.

The FIH has signalled that as the water turf and dry turf technologies gradually converge, water turfs will not be suddenly dropped as approved international surfaces. Therefore, there is no foreseen risk in continuing to install water turfs. Furthermore, there is little cost difference in installation between a top-level water turf and a top-level

dry turf. Therefore, from a cost perspective the only rationale for choosing a dry turf is to limit ongoing operational costs with irrigation systems.

There are currently 69 turfs of various surface types (including half turfs and multi-use turfs) throughout New Zealand to which Hockey Associations have access for matches. These turfs are under a variety of different ownership structures including dedicated turf trusts (approximately 40% of turfs), direct Association ownership (25%), schools (24%), and Councils (9%).

The ownership of the turfs and their associated facilities can impact significantly on their accessibility to the local Association. For example, many schools have developed policies such as school team home matches only, or female teams only at girls' schools, which impact on accessibility for the Association. Also, as many schools are located within residential areas they often face issues in obtaining resource consents for lights. As these are not a core requirement for school use, the schools often do not pursue the consent, which significantly impacts on Association access in the evenings for matches and practices.

Therefore, to provide a better indicator of turf accessibility, the concept of a Full Time Equivalent ("FTE") turf has been devised. An FTE Turf has been defined as a turf that provides at least 54 hours access per week i.e.: provides full access during the peak periods of 4pm – 10pm weekdays (30 hours), all day weekends (2 x 12 hours), but excludes early morning weekdays for practices. Based on survey responses from Associations, an estimate has been made that the 69 available turfs equate to 58 FTE turfs.

Table 1: Turfs Currently Used by Associations

Association	Total Turfs Used	FTE Turfs
Canterbury	8	3.8
Auckland	7	4.1
North Harbour	6	5.1
Waikato	5	3.0
Bay Of Plenty	4	4.0
Tauranga	4	2.7
Wellington	4	4.5
Manawatu	3	2.6
Northland	3	3.0
Eastern Southland	2	2.0
Hawkes Bay	2	2.0
Invercargill	2	2.0
Nelson	2	2.0
Otago	2	2.0
South Canterbury	2	2.0
Taranaki	2	2.0
Wairarapa	2	2.0
Central Otago	1	1.0
Counties Manukau	1	1.0
Horowhenua	1	1.0
Marlborough	1	1.0
Mid Canterbury	1	1.0
North Otago	1	1.0
Thames Valley	1	1.0
Wanganui	1	1.0
West Coast / Buller	1	1.0
Total	69	57.9

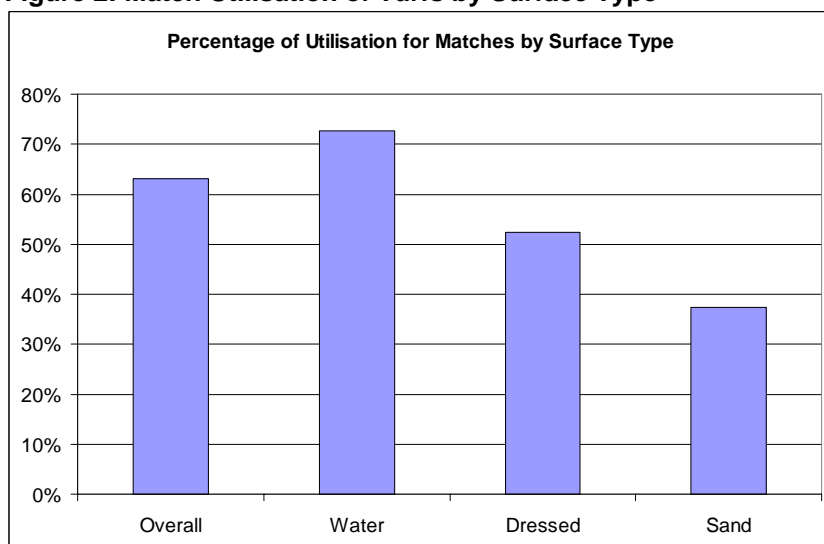
The Associations that are most significantly impacted by a lack of access to available turfs are:

1. Auckland: FTE turfs equate to 58% of available turfs
2. Waikato: FTE turfs equate to 61% of available turfs
3. Tauranga: FTE turfs equate to 69% of available turfs

2.4. Turf Utilisation

The 2010 survey of Associations highlights significant variances in the level of match utilisation of turfs depending upon both the surface type and its ownership.

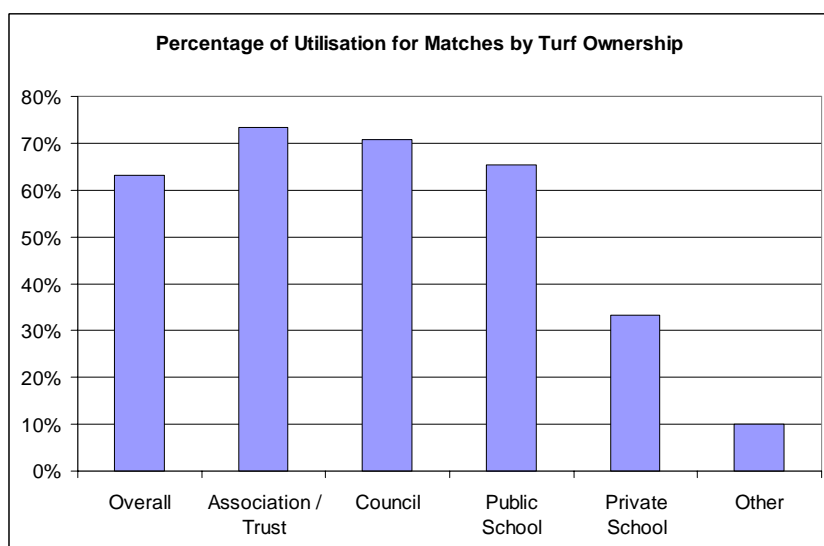
Figure 2: Match Utilisation of Turfs by Surface Type



Overall match usage represents approximately 63% of turf utilisation. However, for water turfs matches represent over 70% of utilisation while for sand turfs, matches represent less than 40% of utilisation. These trends appear to reflect player preferences for playing matches on the highest standard of turf available.

(Source: Association Survey)

Figure 3: Match Utilisation of Turfs by Ownership



As shown in the Figure 3, there is also a significant difference between the utilisation of Association / Trust owned and Council owned turfs as compared with Private School turfs. This perhaps highlights the difficulty in negotiating suitable access agreements with Private Schools and suggests further work is required in this area if private school provision is to significantly assist in growing hockey as a sport.

(Source: Association Survey)

2.5. Demand Management Techniques

The pressure on turf access has resulted in a number of Associations initiating demand management techniques. The Association survey indicates that over 70% of Associations are currently utilising a variety of demand management techniques. The most common of these are:

- Expanding the number of hours per day that competitions are held (85%)
- Expanding the number of days per week that competitions are held (77%)
- Imposing a compulsory bye / stand-down weekend (46%).

2.6. Definite New Supply

The 2010 survey of Associations identified that the following 11 new turfs will definitely be built in the next 2 – 3 years (subject to Local Government Annual plan approvals). Auckland has the highest number of definite new turfs at five turfs, including three water-based turfs. However, the increase in available turf in Auckland will be impacted by the fact that four of these five turfs will be school owned and controlled, therefore impacting on actual availability for club practices and Association competitions.

Table 2: Definite New Turfs

Association	Water	Wet Dressed	Multi-purpose Full Size	Multi-purpose Part Size	Total
Auckland	3	1	1		5
Canterbury	1	1			2
Northland				1	1
North Harbour	1				1
Wanganui	1				1
Counties Manukau	1				1
Total	7	2	1	1	11

(Source: Association Survey)

2.7. Possible New Supply

The 2010 survey of Associations identified that a further 15 turfs will potentially be developed in the next 2 – 10 years.

Table 3: Possible New Turfs

Association	Water	Wet Dressed	Multi-purpose Full Size	Multi-purpose Part Size	Unknown Surface	Total
Canterbury	4					4
North Harbour		2				2
Hockey Manawatu	2					2
Auckland	2					2
Otago	1					1
Northland			1 (or)	1 (or)		1
Hawke's Bay	1					1
Counties Manukau	1					1
Wellington					1	1
Total	11	2	1 (or)	1 (or)	1	15

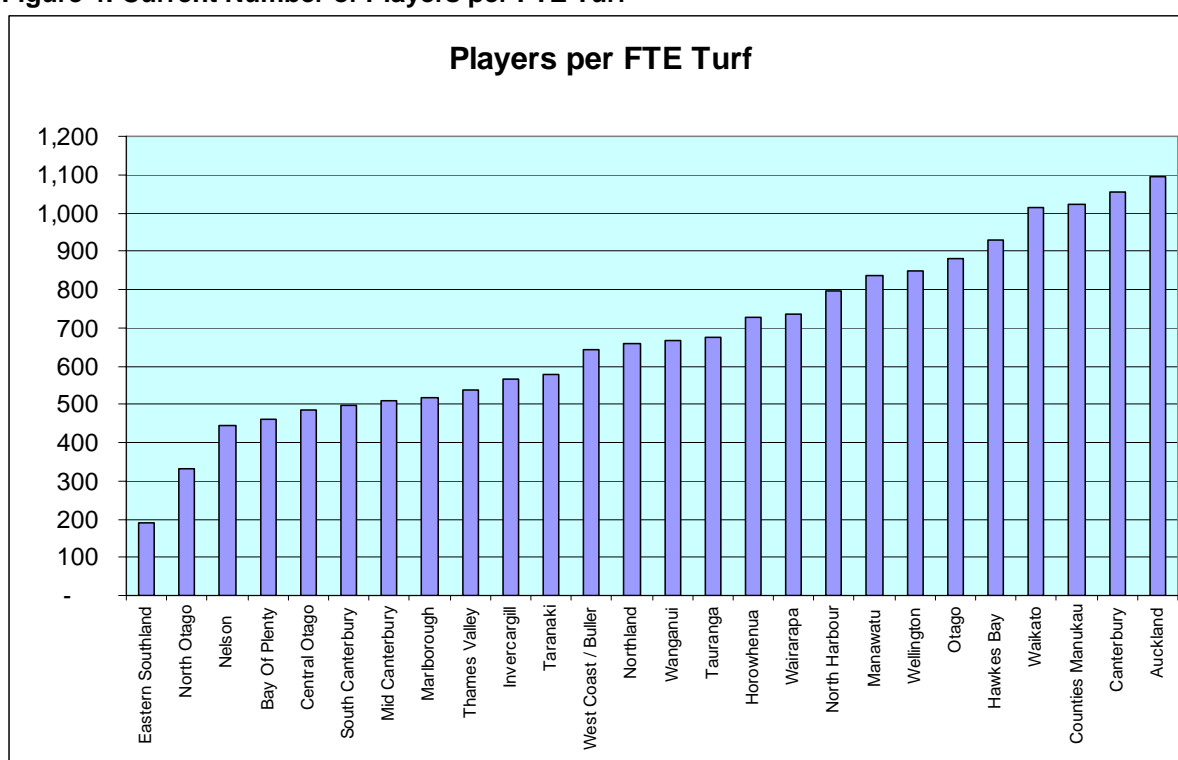
(Source: Association Survey)

2.8. Urgent Turf Requirements

Analysis of turf provision has been completed using “Full Time Equivalent” (FTE) turfs. An FTE turf is defined as one that provides at least 54 hours of access per week to the local Association. This ensures access at all peak demand times and also provides for some early morning access for rep training, etc. The reason for assessing on the basis of FTE turfs is to take into account access issues associated with school turfs that are not recognised if analysis simply focuses on the total number of turfs.

There are currently 69 turfs available to Associations in New Zealand, which are estimated to equate to 58 FTE turfs. Current player per FTE turf ratios are illustrated for each Association in the Figure below.

Figure 4: Current Number of Players per FTE Turf



The PWP believes that sustainable number of players per turf is in the range of 600 to 850 winter players per FTE turf and represents a manageable level of demand. The PWP considers a minimum of 600 winter players is required to generate sufficient occupancy and turf hire fees to maintain and renew the turf without undue reliance on third party funding. The PWP has, therefore, adopted 850 winter players per FTE turf as the desired threshold level or tipping point to initiate planning and development of an additional full size FTE turf. Above the 850 level the PWP considers the demand management measures will significantly erode the quality of the Hockey experience for the playing membership. It is noted by the PWP that use of part turfs to manage demand is critical. On this basis there are seven (7) Associations that are currently under-provided, as summarised in the Table below.

Table 4: Players per FTE Turf

Association	Players per FTE
Auckland	1,095
Canterbury	1,056
Counties Manukau	1,021
Waikato	1,015
Hawkes Bay	930
Otago	880
Wellington	850

The concept of a player FTE in terms of turf use was explored by the PWP with possibly a ratio of a senior player (full FTE), youth (part FTE) and junior (part FTE). On further consideration of the concept there is variable use of turf time per player within each category and achieving a reasonable level of accuracy and reliability would require analysis effort beyond current resources. Accordingly, a generic “player” is used for assessing manageable demand.

Some Associations (e.g. Canterbury and Auckland) with access to surfaces other than full size turfs are using these part size surfaces to manage demand. Competitions as well as practices are allocated to these part size surfaces when demand exceeds full size turf capacity. When an additional turf is established these competitions and practices are pulled back to the full-size turf to maximise occupancy of Association funded turfs. To illustrate, Canterbury currently have 1,800 players (mostly juniors) out of a total of 4,200 players using these turfs for their competition games and practices.

This should be a key strategy of Associations in building player numbers to quickly build sufficient occupancy to sustain a new full FTE turf.

Auckland’s player ratio is so high compared to the number of turfs because of the high proportion of school turfs to which Auckland Hockey has limited access.

Taking into account definite new supply over the next two years and the projected rate of player growth, there are five (5) Associations that will still exceed the 850 winter players per FTE turf threshold in 2011, as illustrated in the Table below.

Table 5: Winter Players per FTE Turf Exceeds 850 in 2011

Association	Players per FTE
Waikato	1,039
Hawkes Bay	949
Otago	889
Wellington	863
Manawatu	858

These five Associations (plus Poverty Bay which does not have an artificial turf) are, in the PWP’s assessment, the highest priority areas for additional turf provision.

The PWP has also assessed the **minimum number of players** needed to sustain a turf at 600 winter players for a FTE turf. This is based on the assumption that the Association has to fund all of the operating costs and the majority of funding of the renewal of the surface (on a 10 year renewal cycle). Currently there are eleven (11) Associations with players per turf below the assessed minimum of 600 winter players per FTE turf and these are summarised in the table below. These turfs may not necessarily be under threat with regard to sustaining their

operation, maintenance and renewal because of the availability of third party funding and/or strong participation in summer leagues generating additional user revenue.

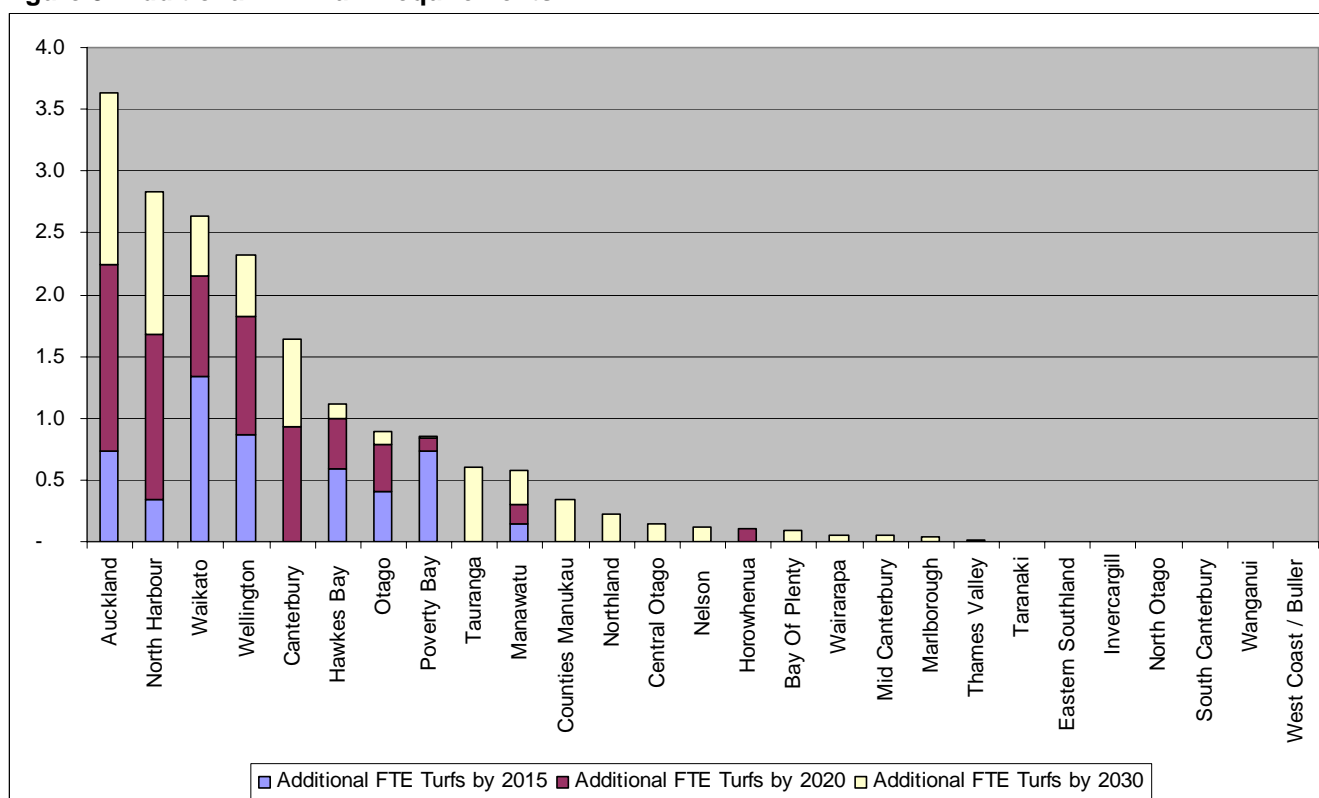
Table 6: Winter Players per FTE Turf is under 600 in 2009

Association	Players per FTE
Taranaki	580
Invercargill	566
Thames Valley	536
Marlborough	518
Mid Canterbury	510
South Canterbury	496
Central Otago	486
Bay Of Plenty	462
Nelson	444
North Otago	332
Eastern Southland	189

2.9. Estimated Level of Future Turf Provision

The level of future turf provision required by 2015, 2020, and 2030 (over and above the definite new supply that will occur in the next two years) has been analysed. 2015 is considered the earliest that a new turf is likely to be developed if the process is initiated in 2010. New turf provision has been considered in terms of FTE turfs. As such, an Association or Trust owned turf would equate to an FTE turf while a school turf could equate to anywhere between 0 – 1.0 FTE turf depending upon the level of negotiated access.

Figure 5: Additional FTE Turf Requirements



There are five Associations that require in excess of 0.5 additional FTE turfs over and above definite new supply by 2015. The greatest requirement is in Waikato, Wellington, Auckland, and Poverty Bay. Further new supply is required to accommodate growth between 2015 and 2020. The greatest needs are in Auckland (1.6 FTE turfs), North Harbour (1.4), Canterbury (1.2), and Wellington (1). The Associations that are projected to have the greatest supply increase requirements between 2020 and 2030 are Auckland, North Harbour, Canterbury, and Tauranga.

Across the whole country, it is estimated that 18.3 additional FTE turfs are required between 2010 and 2030 over and above the 11 new turfs that will definitely be provided over the next 2 – 3 years. Currently, 69 turfs are providing the equivalent of 57.9 FTE turfs. Assuming the same ratio is maintained in future turf provision, it is estimated that 22 additional new turfs will be required over the next 20 years to meet the projected growth requirements of hockey in New Zealand.

2.10. Funding implications

At an indicative average cost of \$1.5 million for a new turf, capital funding of \$33 million will be required to deliver the 22 additional turfs required to service a 2% average annual growth scenario. This is in addition to the \$16.5 million of funding required for the 11 definite new turfs to be provided over the next 2 – 3 years.

As the number of turfs in New Zealand increases, so does the contingent liability around future maintenance and renewal. Assuming an average turf life of 10 years², a replacement turf carpet cost of \$350,000, and a need to replace the shock pad every 20 years at an additional cost of \$150,000, the average annual turf renewal cost would be \$3.6 million per annum over the 20 year planning period from 2010 – 2030.

Many territorial authorities (TLAs) around New Zealand have traditionally appeared reluctant to provide funding assistance for hockey turfs, particularly relative to other field sports e.g.: rugby, soccer and cricket. Funding agencies that have traditionally supported sports e.g.: Community Trusts and Gaming Trusts are also coming under increasing funding pressure.

Hockey as a sport will therefore need to find better / alternate ways of securing funding through:

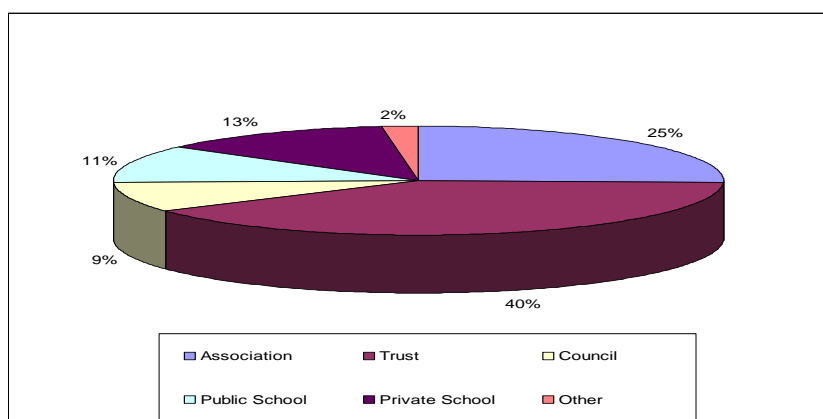
- a) Better accessing available funds from TLAs and other funding agencies
- b) Improving the revenue generating capabilities of clubs / Associations.

2.11. Ownership and Maintenance of Existing Facilities

Turfs are owned by a range of entities, including Associations, Trusts, Councils and schools. Through the Association survey ownership information was compiled in relation to 55 of the 65 turfs regularly used by Associations throughout the country. This data shows that 40% of turfs are owned by Trusts with Associations owning 25%. Collectively public and private schools own a further 24%, while Councils own 9%.

² In reality, turf life will vary depending upon a range of factors including, the type of turf, level of usage, and nature of the local environment. It would be reasonable to allow for turf life to fluctuate between 8 – 12 years depending upon these factors.

Figure 6: Ownership of Existing Facilities



(Source: Association Survey)

Maintenance and renewal of turfs is expensive, with water turfs generally being earmarked for renewal after 8 - 10 years and wet dressed turfs estimated to need renewal after 10 - 15 years. Sand turfs are now being replaced by Associations with either water or wet dressed turfs as they reach the end of their useful life.

To simply replace the existing inventory of turfs as part of a regular maintenance

programme is likely to cost an average of at least \$3.2 million³ per annum over the next 10 years across the country. This represents a significant funding issue for existing turf owners.

2.12. Cost to Play

There is concern amongst some hockey stakeholders that hockey has a perception as having high player subscription costs relative to other sports because of the need to develop and maintain facilities. A sample of Auckland codes was undertaken. The relative cost of hockey can be considered in the context of subscription fees for hockey, netball, football, and rugby in Auckland.

Table 7: Relative Cost of Subscriptions

Sport	Senior	Youth	Junior
Hockey	\$400	\$200	\$135
Netball	\$150	\$135	\$120
Football	\$220	\$137	\$100
Rugby	\$70	\$67	\$67

This comparison illustrates the manifestly higher cost of hockey, especially once relative equipment costs are factored in.

³ For the purposes of modelling several assumptions have been used. The cost per carpet renewal is \$400,000 (2010 value). The assumed life of the carpet is 10 years and the life of the pad is 30 years i.e. every third carpet renewal. Based on the existing stock of 69 turfs this means on average 6.9 turfs need renewal every year. If a third require renewal of the pad as well at an additional cost of \$200,000 (2010 value) then the overall average cost per year is \$3.2 million.

2.13. High Performance

2.13.1. High Performance Planning

Hockey New Zealand commissioned an independent review of its High Performance Programme in 2008. While this review identified a number of issues and made 14 key recommendations, significantly it concluded that access to high quality hockey facilities was not seen as a limiting factor for the High Performance Programme.

The only facility related issue noted in the review was that easy access and/or access at optimal times for high performance coaching was an issue in Wellington and Christchurch.

The primary focus of HNZ's High Performance Plan 'Bridging the Gaps' 2009 – 2012, prepared in February 2009 was on organisational structures, systems, and processes rather than facilities.

2.13.2. High Performance Training

North Harbour is the training base for both the Men's and Women's squads. The choice of North Harbour has been due to:

- Accessibility of high-quality turf
- Proximity to Millennium Institute of Sport & Health ("MISH"), which provides the strength and conditioning programmes for the squads
- Availability of accommodation at MISH
- Availability of gear storage space at North Harbour
- Auckland based coaches and a high proportion of Auckland-based players amongst those that play in New Zealand.

Now that HNZ has relocated its offices to Mt Eden, opposite the Auckland Grammar School (AGS) turf, it is proposed that high performance gear will be stored at AGS. It is also proposed that the AGS turf will be used for one-on-one training sessions with squad training sessions remaining at North Harbour.

2.13.3. High Performance Events

Hockey New Zealand's traditional approach has been to seek to achieve maximum exposure for the sport by touring international matches around the country. In accordance with this strategy Hockey New Zealand has hosted international matches in smaller provincial centres, which seldom host international matches in other major sports.

Similarly for FIH endorsed and FIH events, HNZ has had a policy of 'tendering' opportunities to the various Associations so as to rotate events around the country. This policy has placed a strong reliance on the use of temporary facilities in many locations and has, in a number of cases, not optimised the financial outcomes from HNZ's perspective.

Moving forward, HNZ intends to shift to hosting one FIH accredited event per annum at an international level facility in one of the main urban centres.

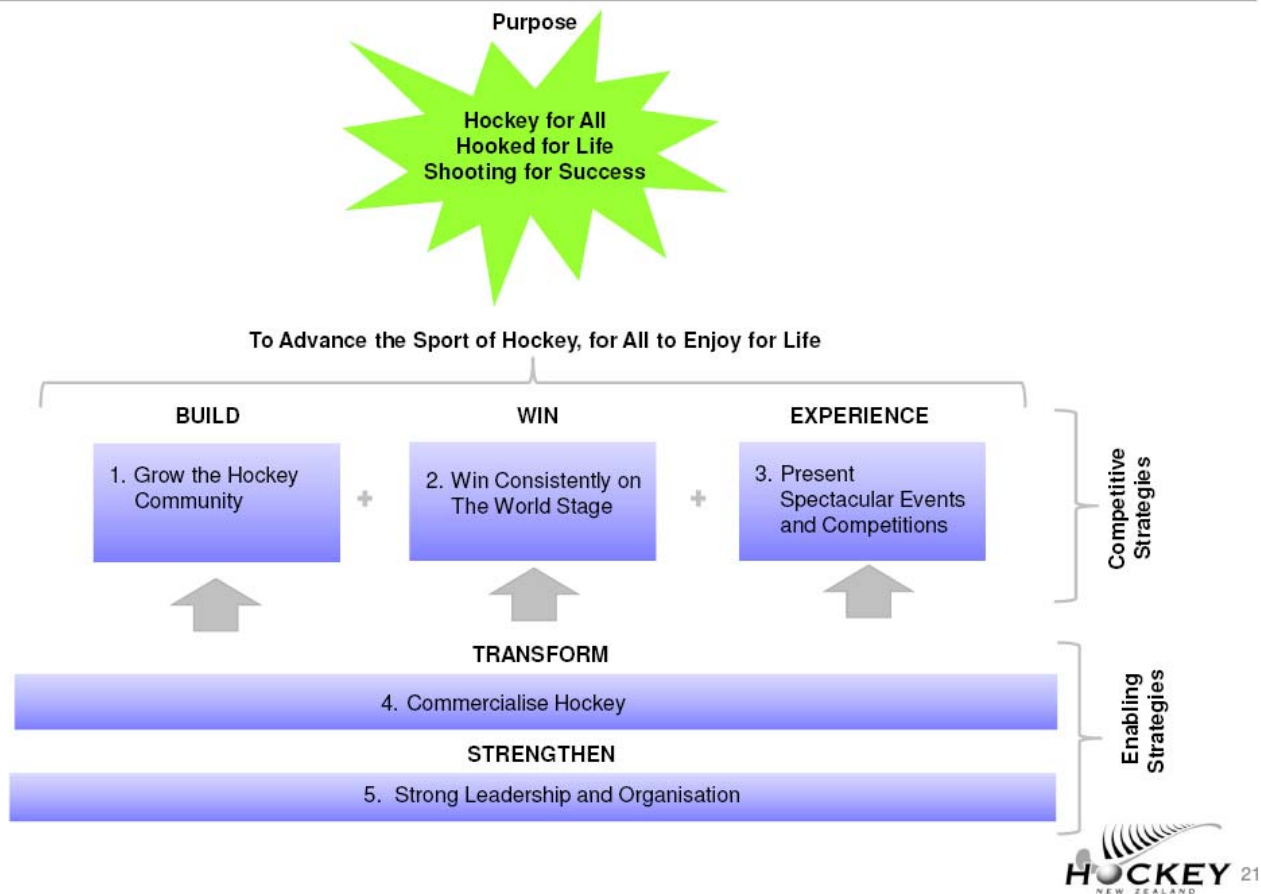
HNZ is aiming to develop and own a "four nations" international event that will be an annual fixture based on the three CCC's approach of convenience, consistency and certainty.

For home internationals, HNZ intends to host 6-8 per annum and will adopt a two tier approach for these. The top tier will be rotated amongst the main centres so as to maximise crowd numbers and the potential to have televised matches. Tier 2 home internationals will be rotated amongst regional centres to ensure these areas continue to have ready access to international hockey and an opportunity to profile the sport in their local area.

3. HNZ Vision & Goals

HNZ is currently developing the Hockey Strategy. Below is the relevant slide from the Hockey Strategy (version 2) that was presented to the HNZ AGM on 20 March 2010.

2 STRATEGY FRAMEWORK



4. Hockey strategy summary – facility and infrastructure elements

The table below summarises the strategies, goals and strategic initiatives. The Hockey Strategy framework presented for discussion at the AGM on 20 March 2010 has been adopted to enable easy integration of facility and infrastructure strategies, goals and initiatives.

Table 8: Summary of Strategy, Goals and Key Initiatives

Strategy	Goals	Key initiatives
<p>Grow the hockey community</p> <p><i>'BUILD'</i></p>	<p>Access to suitable physical infrastructure capacity to meet demand</p>	<ol style="list-style-type: none"> 1. Encourage entry level hockey activity to be delivered locally on range of appropriate surfaces [<i>usually indoor or outdoor courts</i>] to improve accessibility compared to competitor sports 2. Encourage Associations to increase use of a small sided game format (consistent with nationally branded participation programmes) to increase turf revenue and/or reduce fees for entry level players. 3. Encourage Associations to plan to deliver turf capacity just in time using improved predictive modelling and evidence based advocacy to funding partners 4. Encourage Associations to supplement the core hub facility by establishing satellite turfs to improve accessibility (i.e. play home and away, practice local) 5. HNZ to support Associations in advocating for development of turfs and part turfs [hard court overlays] on school sites to increase profile of hockey in schools 6. Encourage Associations to partner with schools and Councils to share cost burden in provision of hub facility and satellite turfs to reduce cost to play 7. Encourage Associations to use non-hockey funded surfaces for practice and some junior competitions when Association owned turfs are fully occupied during their useable hours [<i>tennis club, school, etc</i>] 8. Encourage investment in Club and Association facilities to enhance the social experience of Hockey

Strategy	Goals	Key initiatives
Present spectacular events and competitions <i>'EXPERIENCE'</i>	Develop a suitable hierarchy of venues to host spectacular events	<ol style="list-style-type: none"> 9. HNZ finalise a specification and hierarchy for venues in consultation with Associations 10. Develop a national stadium for hosting FIH top property events 11. Selected investment (by Associations and their funding partners) in venues that comply with HNZ requirements for other HNZ international events 12. Establish a core hub facility in each region able to host all domestic tournaments (including masters) 13. Encourage Associations to establish an venue facility in each region that complies with HNZ requirements to host HNZ international test events and NHL games
Win consistently on the world stage - High performance development <i>'WIN'</i>	Assured access for national squads to appropriate training facilities	<ol style="list-style-type: none"> 14. HNZ to co-locate a national training facility with a hub facility (then national stadium when developed) to provide assured access for national squad and player development purposes
Commercialise Hockey <i>'TRANSFORM'</i>	Deliver value for money access to facilities	<ol style="list-style-type: none"> 15. Priority is to maximise use of hockey Association owned turfs 16. Establish at least one core hub facility in each region/larger Association to improve net revenue through economies of scale (operational efficiencies) and sufficient hourly throughput to sustain higher levels of service 17. Increase supplementary spend by users on products and services such as food and beverage at hub facilities to increase net revenues 18. Selective investment in pavilion facilities to improve level of service (especially food and beverage) and increase the social value to users 19. Develop small sided (e.g.: 6 v 6) game formats that are nationally branded and involve a marketed participation programme to achieve higher player throughput per hour to improve net revenues from turf use

Strategy	Goals	Key initiatives
<p>Best practice – Protect value of assets</p> <p><i>‘STRENGTHEN’</i></p>	<p>Assure value of assets through sound asset planning and management</p>	<p>20. Encourage completion of an asset management plan (AMP) for each turf owned by an Association to enable budget provisions for timely renewals.</p> <p>21. Encourage each Association to complete a funding plan for renewal of infrastructure using HNZ defined guidelines (to be developed)</p> <p>22. Encourage Associations to maintain quality of turf and other infrastructure to agreed HNZ standards</p> <p>23. HNZ to establish a support service to gather and hold best practice information on infrastructure development and management and offer advisory services to Associations and other turf owners and operators</p> <p>24. HNZ to develop an operating manual template for turfs for use by turf owners and operators</p>
<p>Best practice - Knowing our business</p> <p><i>‘STRENGTHEN’</i></p>	<p>Best practice benchmarks are established and monitored consistently across NZ for turfs and infrastructure owned or part owned by hockey</p>	<p>25. HNZ initiate in conjunction with Associations the establishment of best practice benchmarks for turf performance [such as use, occupancy, pricing, revenue, costs, renewal savings]</p> <p>26. HNZ initiate in conjunction with Associations the standardised reporting against best practice benchmarks by all Associations and turf owners and operators</p> <p>27. HNZ to collate the data to enable evidence-based advocacy by Associations to Local Government and other funding partners</p>

4.1. Grow The Hockey Community

4.1.1. Infrastructure Goal

Access to sufficient quality facilities to sustain and stimulate demand.

4.1.2. Strategy Description

Growth in participation is being modelled on an annual average 2% increase in players and this will increase demand for turf time. Growth is projected to be uneven across the Associations. Managing demand growth is a challenge because the addition of a new FTE turf⁴ can increase capacity of the Association by between 20 to 100%. The high capital cost of development means a “just in time” approach is needed.

The PWP believes that sustainable number of players per turf is in the range of 600 to 850 winter players per FTE turf and represents a manageable level of demand. The PWP considers a minimum of 600 winter players is required to generate sufficient occupancy and turf hire fees to maintain and renew the turf without undue reliance on third party funding. The PWP has, therefore, adopted 850 winter players per FTE turf as the desired threshold level or tipping point to initiate planning and development of an additional full size FTE turf. Above the 850 level the PWP considers the demand management measures will significantly erode the quality of the Hockey experience for the playing membership.

This situation leads to periods when demand exceeds supply while player numbers are building towards the tipping point to develop an additional turf. Associations implement demand management strategies such as practices for most grades and junior competition games being shifted to part size turfs or other surfaces. This activity then returns to the new additional turf and the cycle commences again. Accurate predictions of when an additional turf is needed are problematic because growth is influenced by many factors out of the control of hockey such as the relative popularity of competitor sports.

Hockey has a competitive advantage in using artificial surfaces because it is rarely if ever cancelled due to weather. In addition, Local Government is starting to replace soil fields with artificial surfaces for football and rugby usually because of demand outstripping capacity in particular localities with high land costs or no additional land available. There is both an opportunity (for a better deal on cost of provision through direct comparison with football and rugby) and a threat (because all weather capacity of these codes will grow). Please refer to Appendix 5.2 on page 28 for further background on multi-purpose surfaces.

A disadvantage is the need to travel further to play and practice than most of the other field sports. This adds greatly to the time and cost of playing Hockey, particularly for families with more than one Hockey player. A key initiative is to develop satellite turfs after the main Association hub⁵ facility is in place and operating in a sustainable manner. Satellite turfs should have assured Association access through a long term legally binding agreement. The Association should be encouraged to seek partnerships with Local Government and schools or sports clubs to reduce the financial burden on hockey players of satellite turfs. Schools needing external funding support are natural partners. Satellite turfs provide a more localised base for a club and provide for practice and some junior competition. Many of these surfaces could be part size such as an overlay on hard courts. An added value benefit of locating turfs in schools is it raises the profile (particularly exposing students from non-hockey families to the sport. The turfs presence should assure a strong following of Hockey in the school.

⁴ An “FTE turf” means a full size floodlit turf used during the winter season for 54 hours per week (Mon. to Fri. from 4.00pm to 10.00pm and from 8.00am to 8.00pm Sat. & Sun.). These hours are assumed to be under the control of the Association and generally have a mix of game and practice use. A turf may provide a lesser number of hours for Association use and is identified as a “part FTE turf”

⁵ A hub would usually have at least one water turf and a suitable pavilion facility capable of hosting inter regional fixtures and smaller national tournaments. Larger Associations are likely to have two or three turfs at their hub with a suitable scale pavilion.

Hockey New Zealand will support Associations to become more actively involved in liaising with schools, which are increasingly opting for artificial turfs (often to replace existing hard courts), particularly those schools with little land. Hockey New Zealand will develop a relationship with the Ministry of Education at the national level. Associations will be encouraged by Hockey New Zealand to strengthen relationships with Regional Sports Trusts. The benefits of cultivating these relationships include:

- With multi-sport turfs, Hockey New Zealand could influence the turf specifications to deliver surfaces that are more suitable for hockey
- With dedicated hockey turfs, the respective Association with support from Hockey New Zealand, could help inform the school on the most suitable turf type and secure access arrangements that work for both the schools and the Association
- Associations, with support from Regional Sports Trusts and Hockey New Zealand, could also help foster stronger relationships between schools and clubs, thereby strengthening the flow of players into the club structure and assisting to grow the game.

The mechanisms and proportion of Hockey's contribution toward the capital funding of turfs (development and renewal) varies hugely from around the country. It is manifestly higher than most of the field sports that Hockey identifies as its competition for recruiting players to grow the sport. Reducing this cost burden on the Hockey community needs to be a key initiative to make the sport more attractive. This can be done through successfully advocating for a better deal from Local Government and through using turfs provided by others such as schools and multi-purpose surfaces.

Development and regular refurbishment of suitable scale pavilion facilities to provide an attractive setting for social interaction is an essential element in retaining players (and their supporters) in Hockey. The move towards centralised facilities has resulted in the weakening of the social culture within many hockey clubs around the country. In some Associations this has been exacerbated by the absence of or limited pavilion facilities at the centralised venue. In seeking to improve the overall appeal of the sport and attract a broader player base, further investment in pavilions and associated social facilities will be important.

Small sided games within the mix of hockey activity could deliver lower charges in the case of entry level players but a similar turf fee revenue per hour to the Association (more players paying lower charges per individual player). Please refer to Appendix 5.4 on page 29 for more detail on impact of lower fees on revenue and the nationally branded participation programmes under the Commercialise Hockey strategy.

The development of an Infrastructure Plan encompassing the above will enable an Association to use the Plan to inform Councils of their needs, particularly in terms of renewals and additional capacity to meet anticipated growth.

4.1.3. Key initiatives

1. Encourage entry level hockey activity to be delivered locally on range of appropriate surfaces [*usually indoor or outdoor courts*] to improve accessibility compared to competitor sports
2. Encourage Associations to increase use of a small sided game format (consistent with nationally branded participation programmes) to reduce turf fees for entry level players.
3. Encourage Associations to plan (i.e. an Infrastructure Plan) to deliver turf capacity just in time using improved predictive modelling and evidence based advocacy to funding partners
4. Encourage Associations to supplement the core hub facility by utilising satellite turfs to improve accessibility (i.e. play home and away, practice local)
5. HNZ to support Associations in advocating for development of turfs and part turfs [hard court overlays] on school sites to increase profile of hockey in schools

6. Encourage Associations to partner with schools and Councils to share cost burden in provision of hub facility and satellite turfs to reduce cost to play
7. Encourage Associations to use non-hockey funded surfaces for practice and some junior competitions when Association owned turfs are fully occupied during their useable hours [*tennis club, school, etc*]
8. Encourage investment in Club and Association facilities to enhance the social experience of Hockey.

4.1.4. Key Performance Indicators

- i. Infrastructure Plans completed by Associations showing renewals and planned development against projected demand by late 2011⁶
- ii. Associations offering nationally branded participation programmes including small sided games with reduced turf charges for entry level players.

4.2. Spectacular events and competitions

4.2.1. Infrastructure Goal

Develop a suitable hierarchy of venues to host spectacular events

4.2.2. Strategy Description

A key issue requiring consideration is the desirable level of investment in permanent facilities at event venues. This will, in part, depend upon HNZ policy on international events and how venues can achieve a “return” on their higher level of infrastructure investment. It also raises the question as to whether there is a role for HNZ in directly assisting in funding of event facilities. There are very few precedents for this amongst other sports in New Zealand.

One suggestion has been for the development of three high performance event venues in Greater Auckland, Wellington and Christchurch. Ideally, each of these venues would comprise two fields separated by a pavilion, with bleachers running along the remaining sides and formed areas behind the bleachers for temporary seating. There would be video towers behind each of the goals. The fields would be fitted out with the best international standard turfs available at the time of renewal (i.e.: the focus is on having the best international surface, not necessarily the most cost-effective surface for the local Association and this could be an area where HNZ assistance is required).

An alternative suggestion has been to focus investment in a single national stadium facility. The facility requirements would likely be similar to the above option but feature a greater level of permanent investment.

A key consideration is the likely frequency and status of international events. The latest Expression of Interest from FIH for international events between 2011-2015 states that Top Property events including World Cup, Champions Trophy and World Series will be allocated based on the country that maximises commercial returns. This strong emphasis on commercial returns is likely to place New Zealand at a distinct disadvantage against larger countries (e.g. Australia) and Northern Hemisphere countries. The hosting of FIH events in New Zealand may, therefore, be limited to 2nd Tier events. HNZ’s goal is one major FIH event per annum below World Cup.

⁶ Completion by mid 2011 will enable the Associations to use the Infrastructure Plan to advocate to Councils as they enter the major review of the LTCCP

HNZ has a programme of international and domestic events that require venues⁷ capable of meeting the physical infrastructure needs of these events. An agreed facility criteria for tournaments and internationals is needed in order to provide greater clarity to Associations around appropriate facility investments and thereby better inform Local Government and other funding stakeholders.

These events vary in their requirements and HNZ has developed a finalised specification for each level of event (please refer to Appendix 5.5 on page 30). Some of these events have FIH specifications that must be complied with. HNZ will provide for a transition period to through a dispensations system so that Associations can reach accreditation for a particular level of event within their planned works programme.

HNZ over time wishes to develop a hierarchy of venues at national, regional and Association level that mirror the distribution of games and tournaments as outlined in the national events strategy (to be developed)⁸. The provision of ancillary infrastructure⁹ to host events can be expensive, particularly if repeated installation and breaking down of temporary infrastructure occurs.

This is not a “one size fits all” approach. HNZ intends to encourage Associations to deliver venues that are capable of meeting the specification for turf and ancillary infrastructure that matches their aspirations and the Event Strategy.

The concept of a national stadium to host FIH top property events will be pursued as will establishing at least one hub venue in each region able to host the largest tournament in the events programme – the National Masters Tournament. The decision to discontinue the bid to host the 2018 Commonwealth Games makes the development of a national hockey stadium a larger challenge. In addition, HNZ will encourage Associations with aspirations to host HNZ managed international test events and National Hockey League (NHL) games to comply with the specification.

4.2.3. Key initiatives

9. HNZ complete a specification and hierarchy for venues in consultation with Associations (includes assessment and accreditation of current facilities)
10. Develop a national stadium for hosting FIH top property events
11. Selected investment (by Associations and their funding partners) in venues that comply with HNZ requirements for other HNZ international events
12. Establish a core hub facility in each region able to host all domestic tournaments (including masters)
13. Encourage Associations to establish a facility in each region that complies with HNZ requirements to host HNZ international test events and NHL games

4.2.4. Key Performance Indicators

- iii. Event Venue Specification developed and endorsed by Associations and Regions
- iv. National hockey stadium planning completed by 2012 and developed by 2018
- v. Hubs that comply with the specification to host the National Masters Tournament in each region by 2014
- vi. Venues that comply with the specification to host the HNZ international test events and NHL games in each region by 2014

⁷ Venue means suitable quality turf plus spectator, VIP and media facilities are in place without need for major temporary fit out

⁸ The Events Strategy is currently under development as part of the Whole of Sport Plan.

⁹ Ancillary infrastructure can include VIP facilities, spectator seating, toilets, media facilities, video towers for recording and analysis purposes

4.3. Win consistently on the world stage - High performance development

4.3.1. Infrastructure Goal

Assured access for national squads to appropriate training facilities.

4.3.2. Strategy Description

HNZ has moved its headquarters to premises across the road from the Auckland Grammar School (“AGS”) turf and has arranged access as a transitional arrangement for coaching and development use for one on one and small trainings during the day.

At a regional level HNZ has identified that it would like to see the development of four regional high performance programmes that develop and retain regional talent using various venues. These would include water turfs and video tower, and would primarily service all representative squads below the national level.

4.3.3. Key initiatives

14. HNZ to develop a world class training facility as part of the national stadium project to provide assured access for national squad and player development purposes

4.3.4. Key Performance Indicators

- vii. Commitment to proceed with development of world class training facility by 2012.
- viii. Facility in place by 2018

4.4. Commercialise Hockey

4.4.1. Infrastructure Goal

Deliver value for money access to turf and facilities.

4.4.2. Strategy Description

Hockey is one of a few sports that funds fully the operational costs of their playing surfaces since it converted from grass based to artificial turf. In urban centres where hockey turfs are located most competitor field sports pay nothing or up to 15% of these costs because of the traditional provision by Local Government of natural grass fields.¹⁰ This has resulted in manifestly different cost structures for field sports including hockey. Gaining greater parity with the other field sports will improve the value for money access to turf. HNZ will support Associations by supplying data for their evidence based advocacy.

Associations first and foremost need to sustain their own turfs. Therefore use of Associations turfs need to be maximised to generate the sufficient revenue from user charges to sustain the turfs. There are risks associated with the development of additional turfs by other providers drawing away users from Association owned turfs, particularly if the cost structure (and pricing) is lower at these alternative turfs. Associations need to be aware of this risk when planning for the development of additional Association owned turfs.

¹⁰ In some rural areas Local Government only provides land and all operating costs are borne by the field sport.

Consolidation of social and in some cases playing facilities is an established trend across sport. Sometimes this is a cluster of sports sharing facilities and services as in the Sportville concept, sometimes it is a single sport consolidating on a smaller number of sites and facilities. This is usually in pursuit of benefits from economies in scale (operational efficiencies) and critical mass in terms of greater throughput of users to improve the viability and profitability of ancillary services such as food and drinks. Hubs should increase supplementary spend by users on products and services such as food and beverage at hub facilities and should increase net revenue. However, a common driver is to improve the social value for players and their supporters.

Consolidation has already occurred in hockey in terms of the shift to a smaller number of artificial surfaces and in many cases the withdrawal from clubrooms at formerly hockey parks. The development of hub facilities in each region or larger Association¹¹ is a strategy to gain the benefits listed above. It is envisaged that a hub will have at least two full-size turfs and a suitable scale pavilion. Some Associations may need to invest further in their pavilion facilities and fit out to be able to deliver the higher level of service envisaged such as more café rather than bar environment. However, most should have the essential elements (lounge, kitchen, counter serving of food and drinks).

Increasing the economic efficiency of turfs should be considered through modified formats of the game. There is a strong need for a nationally consistent approach (i.e. National Participation Programme) that can be marketed nationally and locally. Small sided games within the mix of hockey activity would deliver either more revenue per game (more players paying the same charge per player as the 11-a-side game) or, particularly in the case of entry level players, similar revenue per hour (more player paying lower charges per individual player). Please refer to Appendix 5.4 on page 29 for more detail on this model and the reduced fees initiative for entry level players under the Growth strategy.

4.4.3. Key initiatives

15. Develop small sided (e.g.: 6 v 6) game formats that are nationally branded and involve a marketed participation programme to achieve higher player throughput per hour to improve net revenues from turf use
16. HNZ to support advocacy by Associations for greater parity with other field sports in subsidisation of turf access by Local Government.
17. Priority is to maximise use of hockey Association owned turfs
18. Establish at least one core hub facility in each region/larger Association to improve net revenue through economies of scale and sufficient hourly throughput of users to sustain higher levels of service and increase net revenues
19. Selective investment in pavilion facilities to improve level of service (especially food and beverage) and increase the social value to users

4.4.4. Key Performance Indicators

- ix. 80% of Associations operating pay for play competition modules
- x. Associations able to demonstrate improved parity in financial support from Local Government with natural grass field sports by 2013¹²
- xi. Core hub facility with two turfs and suitable pavilion established/identified in each of the larger Associations

¹¹ Associations that can sustain two turfs i.e. with over 1,200 playing members (2 x 600 players)

¹² 2013 will be after next major review of the LTCCP

4.5. Best practice – Protect value of assets

4.5.1. Infrastructure Goal

Assure value of assets through sound asset planning and management

4.5.2. Strategy Description

Hockey is one of a few sports that own and operate most of their own playing surfaces. The asset value of the 69 turfs identified as used by Associations is estimated in the region of \$100 million¹³ and this excludes other assets such as pavilion facilities. It is acknowledged that some of the turfs are not in the ownership of Hockey but the sport is dependent on these turfs to supply capacity to operate effectively.

A fundamental component of prudent management of supply is the completion of an asset management plan (AMP) for each turf in the ownership of hockey. This enables the planning and implementation of programmed maintenance as well as the timely renewal or replacement of assets such as turfs, flood lighting, irrigation, buildings, etc. The implementation of works listed in the AMP will ensure the physical assets deliver quality experiences for users and remain compliant with the specifications/ standards for hosting HNZ events.

The data from the AMP can then be used to develop a funding plan for sustaining the supply of turfs required to meet current and projected demand.

HNZ has developed resources over the last six years¹⁴ to assist the Associations with protecting their substantial value built up over the past 25 years. The need for some more active support from HNZ to assist Associations to plan for and manage these assets has been considered. A support service will be developed if third party funding can be secured to provide advice and services such as working with Associations to develop their AMPs. Some more in-depth services for individual Associations such as preparing an AMP may need to be on a fee payment basis. One component of this approach could be the development of an operating manual reflecting the collective knowledge and best practice drawn from Associations and other sources. The manual would be an online resource that is updated on a regular basis.

4.5.3. Key initiatives

20. Encourage completion of an asset management plan (AMP) template for use by an Association to complete an AMP to enable budget provisions for timely renewals.
21. Encourage each Association to complete a funding plan for renewal of infrastructure using HNZ defined guidelines
22. Encourage Associations to maintain quality of turf and other infrastructure to agreed HNZ event specifications
23. HNZ to establish a support service to gather and hold best practice information on infrastructure development and management and offer advisory services to Associations and other turf owners and operators
24. HNZ to develop an operating manual template for turfs for use by turf owners and operators

4.5.4. Key Performance Indicators

- xii. Event specifications agreed with Associations by the end of 2010

¹³ Calculated at an average value of \$1.5 million per turf if all 69 turfs were replaced in 2010

¹⁴ Resources developed by HNZ for use by Associations include: The National Facilities Strategy - Stage 1 Report completed in June 2004, the Turf Business Plan Template and Guide completed in August 2006 and the Local Government Toolkit for Associations completed in November 2008

- xiii. Initial turf assessment versus criteria completed by end of 2011, then undertaken annually
- xiv. Third party funding is secured for development of facilities and infrastructure advisory service during 2011
- xv. A turf asset management plan template developed in 2011
- xvi. Associations completed turf asset management plans for turfs owned by Association by June 2012
- xvii. Operating manual template developed in 2011 for implementation in 2012

4.6. Best practice - Knowing our business

4.6.1. Infrastructure Goal

Best practice benchmarks are established and monitored consistently across NZ for turfs and infrastructure owned or part owned by hockey

4.6.2. Strategy Description

During research to establish the current situation regarding turfs and player numbers it became apparent that there is variation in how Associations define, record, collate and present data. Unicef succinctly placed the need for a consistent and systematic approach across Associations:

Without definitions there can be no measurement; without measurement there can be no data; without data there can be no monitoring; and without monitoring there can be no evidence-based policy, effective advocacy, or public accountability.¹⁵

Evidence-based advocacy requires the implementation of recording against the best practice benchmarks by Associations and their reporting into a national system. It will also assist with identifying best practice in the provision and management of turfs. It is important to recognise range in the capacity to record and monitor from the fully volunteer through to full time paid administrations. Therefore a systematic approach is essential with a small number of carefully selected and defined best practice benchmarks.

4.6.3. Key initiatives

- 25. HNZ initiate, in conjunction with Associations, the establishment of benchmark data for turf performance [such as use, occupancy, pricing, revenue, costs, renewal savings, Local Government contributions]
- 26. HNZ initiate, in conjunction with Associations, the standardised reporting against best practice benchmarks by all Associations and turf owners and operators
- 27. HNZ to collate the data to enable evidence-based advocacy by Associations to Local Government and other funding partners

4.6.4. Key Performance Indicators

- xviii. Turf best practice benchmarks identified and agreed with Associations during 2011
- xix. Standardised reporting system implemented in 2012

¹⁵ UNICEF Innocenti Research Centre (2008) Innocenti Report Card 8, 2008, United Nations Children Fund, Italy

xx. HNZ complete annual collation of turf performance data supplied by Associations commencing in late 2011.

5. Appendices

5.1. Player Numbers

The following table presents data drawn from 2010 survey of Association and where there was no response to this survey was drawn from data supplied earlier by Associations to HNZ.

Table 9: Current Summer and Winter Hockey Player Numbers by Association (2009)

	Summer	Winter	Summer %
Auckland	1,210	4,446	27.2%
Bay Of Plenty	450	1,849	24.3%
Canterbury (incl. Malvern)	1,041	3,989	26.1%
Central Otago	40	486	8.2%
Counties Manukau	296	1,021	29.0%
Eastern Southland	-	377	0.0%
Hawkes Bay (incl. Central)	508	1,859	27.3%
Horowhenua	400	726	55.1%
Invercargill	90	1,131	8.0%
Manawatu (incl. Rangitikei & Ruahine-Dannevirke)	700	2,186	32.0%
Marlborough	76	518	14.7%
Mid Canterbury	64	510	12.5%
Nelson	520	887	58.6%
North Harbour	2,230	4,077	54.7%
North Otago	112	332	33.7%
Northland	1,842	1,972	93.4%
Otago	626	1,760	35.6%
Poverty Bay	-	544	0.0%
South Canterbury	210	991	21.2%
Taranaki	72	1,159	6.2%
Tauranga	48	1,849	2.6%
Thames Valley	-	536	0.0%
Waikato	650	3,082	21.1%
Wairarapa	337	1,470	22.9%
Wanganui	176	667	26.4%
Wellington	1,277	3,827	33.4%
West Coast / Buller	240	643	37.3%
Total	13,215	42,894	30.8%

5.2. Multi-purpose Surfaces

The increased prevalence, and improved quality, of multi-purpose artificial turfs provide a wide range of opportunities for hockey. This is particularly true in terms of junior and social hockey where smaller format games are more acceptable / desirable and technical turf performance aspects are less important.

Consultation with turf manufacturers suggests several key opportunities exist.

FIH is working more closely with FIFA on specifying turf surfaces that are acceptable to both hockey and soccer. It appears this initiative has been driven in large part by funding arrangements overseas (e.g.: the UK) where community funders will not fund surfaces unless they are multi-purpose. While artificial football turfs typically have a pile length of 40 – 65mm and hockey turf pile lengths range from 14mm for water turfs to 25mm for sand-filled turfs, the multi-use turfs typically have pile lengths in the range of 16 – 22mm.

Enquiries to date indicate that none of these multi-use football / hockey turfs have been installed in New Zealand. However, given the strategic partnering by FIH and FIFA it would seem likely that further evolution in these multi-

use turfs will occur. In this context, and given the emergence of artificial football turfs in New Zealand, HNZ should engage with Football New Zealand to establish what opportunities exist.

Schools are increasingly installing multi-purpose artificial turf surfaces, often in place of old paved surfaces. Typically schools are looking for options that provide as diverse uses as possible (e.g.: football, tennis, netball, hockey, touch). In many instances schools opt not to install a shock pad as it involves additional cost and reduces ball bounce for tennis. However, the surfaces are still well suited to training and match purposes for junior players and also provide some opportunities for social hockey.

The development of multi-purpose turfs provides good opportunities for satellite practice and junior / social facilities in conjunction with centralised and more specialised hockey facilities. This brings an aspect of network planning to turf provision that could reduce the investment cost for the sport and also make the game more accessible to a greater number of people (i.e.: a reduced need to travel to centralised facilities).

5.3. Inconsistent Junior & Summer Game Formats

The 2010 survey of Associations revealed that the format of junior and summer games varies significantly between Associations. For example, the Association survey has shown that summer hockey formats vary across the following range of formats.

Table 10: Summer Hockey Game Formats

No. of Players	Turf Size
6	1/4 Turf
6	1/3 turf
6	1/2 turf
7	1/4 Turf
7	1/3 turf
7	1/2 turf
8	1/4 Turf
8	1/2 turf
8	Full Turf
11	Full turf

(Source: Association Survey)

5.4. Small Game Economic Efficiency Modelling

The impact of having four small sided games of 6-a-side has been modelled to illustrate the impact on revenue per game/hour of the mode of operation.

This simple modelling illustrates that at \$5 per player per match, small format hockey modules have the potential to generate \$1,000 more per evening per turf in revenue than traditional 11-a-side hockey.

	Traditional (11-a-side)	Existing NZ Summer Hockey (8-a- side)	FIH Indoor Format (6-a-side)
Players Per Full-size Turf	22	32	48
Game Time	75	45	45
Transition Time	15	15	15
Total Time	90	60	60
Evening Hrs Available	6	6	6
Game Capacity	4	6	6
Player Capacity	88	192	288
Pay for Play / Player	\$5	\$5	\$5
Revenue Generation	\$440	\$960	\$1,440

Alternatively, the cost per player for the small format modules could be reduced to \$3 so as to encourage greater levels of participation and this would still deliver almost twice as much revenue per evening per turf as traditional 11-a-side hockey.

	Traditional (11-a-side)	Existing NZ Summer Hockey (8-a- side)	FIH Indoor Format (6-a-side)
Players Per Full-size Turf	22	32	48
Game Time	75	45	45
Transition Time	15	15	15
Total Time	90	60	60
Evening Hrs Available	6	6	6
Game Capacity	4	6	6
Player Capacity	88	192	288
Pay for Play / Player	\$5	\$3	\$3
Revenue Generation	\$440	\$576	\$864

5.5. Draft Event Venues Specification

The draft specification has been developed to provide guidance to Associations wishing to host events as to the requirements of HNZ.

THIS WILL BE FORWARDED SEPARATELY.