Northern Tasmanian Municipal Organisation (NTMO) Recreation Committee: Regional Recreation Planning Project 2000
our <u>Future Game Plans</u>

Report No. 5 - ECONOMICS OF REGIONAL SPORT AND RECREATION MARKETS:

'Measuring Perceived Growth / Decline in the Northern Tasmanian Sport and Recreation Industry'

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Incorporating partnership activities between Launceston City Council and the Tasmanian Office of Sport and Recreation and fostering regional approaches to sport and recreation planning and management through working together with regional councils including Break O Day, Dorset, Flinders, George Town, Northern Midlands, Meander Valley and West Tamar

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Acronyms

ABS - Australian Bureau of Statistics

ANZSIC - Australian and New Zealand Standard Industrial Classification

ASIC - Australian Standard Industrial Classification

EGMs - Electronic Gaming Machines

GDP - Gross Domestic Product

LGA - Local Government Area

NTMO - Northern Tasmanian Municipal Organisation

NSRISF - National Sport and Recreation Industry Statistical Framework

PSM - Population Survey Monitor

OSR - Office of Sport and Recreation (Tasmania)

SRV - Sport and Recreation Victoria

Executive Report of The Industry Study

The Industry Study and Its Context

This report is one of a number of reports arising out of the Future Game Plans recreation planning project undertaken in the Northern Region of Tasmania during the first half of the year 2000. The industry study, as part of the overall planning project, focussed on the sport and recreation industry from a market research perspective and was designed to assist in the development of a regional sport and recreation industry development strategy.

The research was undertaken using a social--economics approach to help answer the question: *How does the region's sport and recreation industry get from where it is now to where it wants to be in the future?* The research process was carefully designed to take advantage of recognised sport and recreation statistical frameworks and collection methods to create quality data and information that could be compared to other study data and triangulated with other sources of data (such as Census data) and relied upon to measure and track the development of the regional sport and recreation industry.

The case for thinking strategically about industry development was argued as if there are tensions with a position characterised as 'conventional wisdom', that is the view that the sport and recreation industry, like any part of the free market, can take care of itself. In rejecting this view, strategic thinking was promoted and a range of social and economic benefits were identified as accruing to communities which take positive steps to intervene in free market forces. Strategic thinking means creating economic development strategies suited to local--regional circumstances, social needs, economic demands, financial capabilities, existing built and natural assets, the special conditions and particular resources which constitute the social, economic and environmental capital of a region.

The notion of industry development indicators was introduced as a beginning to the process of measuring and benchmarking industry development. The idea of measuring industry development requires careful consideration and identification of appropriate development indicators and then systematically collecting the data required to track and assess the success or failure of the agreed development objectives over time. To complete the section, the expected outputs were identified and clarified in terms of what results the study could produce.

In order to make sense of the study a context was described in terms of key factors that influence the nature, role and function of sport and recreation to local and regional economic and social development. The study identified a range of significant factors that influence regional sport and recreation industry and development prospects. Data from the Australian Bureau of Statistics was analysed to objectively describe general leisure patterns, participation in sport and physical activities and time use according to regional variations.

The broad economic and social benefits of strategically planning sport and recreation industry development included the following:

1. Communities valuing and identifying with their built and natural assets;
2. Providing for social interaction and community development;
3. Creating self sufficiency by keeping a larger percentage of locally spent funds in the local area and region;
4. Tending to be non-exploitative depending on the quality of planning, level of regulation and the commitment to education, training and raising local awareness;
5. Creating employment opportunities for coaches, trainers, facility managers, programmers, retailers, developers, sports administrators, peak body coordinators etc.;
6. Facilitating joint ventures between communities, governments and private enterprise to develop facilities in terms of maintenance, improvement, extension, expansion, conservation and preservation according to the type of asset on which a sport or recreation is dependent;
7. Providing opportunities for other businesses such as architects, bankers, builders, carpenters, doctors, dentists, fishermen, garage operators, gardeners, hotel and motel owners and employees, insurance agents, petrol station operators, plumbers etc.;
8. Preserving the assets and the environment if proper management, effective policies and planning are implemented to assess impacts and regulate the usage levels (visitor/user numbers, catch limits etc.) and types of uses (i.e. training, competition, seasonal, occasional use for major events etc.) by different sports and recreations;
9. Broadening the local / regional social outlook by way of increasing the interaction between local people and visitors - competitors and participants - who come into a local area for sport or recreation purposes; and
10. Leading to improved infrastructure such as upgrading of roads, paths, parks, reserves, boat launching ramps and piers, amenities (public toilets, change rooms

etc.) and ancillary facilities (seats, tables, shelters, water fountains etc.), playgrounds, sports areas and camping areas etc.

The implications of the economic and social changes occurring in Northern Tasmania are clearly challenges for the NTMO Recreation Committee and its attempts at planning industry development. It is also clear that leisure preferences, sport and recreation participation and the use of free time are changing. Most importantly, these changes are occurring in the context of an ageing population and a declining regional-rural economy according to indicators such as changing age bracket numbers, standardised median incomes and unemployment rates.

The section concludes with a model designed to facilitate critical thinking about change and the consequences of not intervening in free market forces when the indicators already show an overall regional--rural economic decline. The model is "pro planning" and is designed to encourage debate and discussion about key issues that need to be tackled in developing a regional sport and recreation industry development strategy. It provides a set of key questions, some ideas about standard economic and social viewpoints, for and against industry strategies, which create the arguments in policy and decision making on industry development.

Method Used and Findings From the Study

The survey method was primarily based on a questionnaire / interview form that had already been used in Victoria, after a collaborative design process undertaken by the consultant with staff from Sport and Recreation Victoria. The final content of the form included additional questions proposed by members of the NTMO Recreation Committee. The study informants were key decision makers in sport and recreation organisations from across the region and sections of the form sought details on each organisation, their participants, members and/or customers, particulars about each organisation's market and their financial and human resources.

The sport and recreation industry was taken to be constituted by: *local and regionally oriented sport and recreation organisations in the National Sport and Recreation Industry Statistical Framework (NSRISF) that are based on private--commercial, public--government, philanthropic or voluntary--community based means of support and which principally provide open spaces, places, venues, events and matches for most forms of organised and informal sport and recreation activities (excluding gambling and entertainment) and often also provide associated services and* *products, in addition to including retailers of products specifically used by people when attending or participating in sport and recreation activities in a range of natural environments or built facilities.*

Study implementation took place in overlapping phases of mail outs, telephone reminders and interviews to ensure a high level of response and to collect details directly from respondents who indicated they had insufficient time to complete the questionnaire themselves. The final sample obtained was representative of the industry according to the science on probability in a random sample design; the results were also compared with ABS Census data on each LGA and the respondent profile from a similar study in the SW Region of Victoria.

By way of introduction to the findings some details were provided about the problems of measuring the tertiary sector of the economy. These problems tend to relate to the recent emergence of the tertiary sector as the dominant part of the economy, the intangible nature of services that constitute this part of the economy and the difficulty of separating and assessing some parts of the tertiary sector from the primary and secondary sectors of the economy, in that they are often intertwined in statistical collection and reporting processes, for example in surveys of business confidence.

The most common sport services provided or facilitated in the region were, in order: tennis, Australian rules football, basketball, netball, soccer and outdoor cricket with a considerable array of other individual and team sports of special significance to the region, for example wood chopping, various forms of shooting, surfing, horse riding etc. The most common recreation services provided or facilitated in the region were, in order: aerobics / gym / fitness activities, non competitive swimming, martial arts and bush walking with a wide range of other recreations nominated by significant proportions of respondents. Education and training services, such as coaching etc., were identified as the most common *non core* services provided or facilitated by around one third of organisations surveyed. The predominant retail activity was the sale of clothing and footwear with significant retail activity in goods and equipment for golf, shooting and fishing, cycling and a range of team and individual sports.

The examples of study results below provide the basis for establishing indicators and measures of industry development. These first estimates of industry activity could be used as benchmarks and tracked over time to assess future growth / decline in the industry.

Estimates of Economic Activity in Northern Tasmania's Sport & Recreation Industry

Number of paid employees in the regional sport & recreation industry	1,050
Number of volunteers in the regional sport & recreation industry	3,680
Volunteer contribution in hours per week in the regional sport & recreation industry	1,874 hours
Volunteer contribution in nominal dollar value each week (i.e. at $12 per hour)	$22,488
Volunteer contribution in nominal dollar value each year (i.e. $22,488 X 52)	$1,169,376
Number of sport and recreation businesses which have paid employees	168
Gross turnover in sport and recreation business each year	$55,630,000
Average weekly expenditure per participant on organised sport/recreation activities	~$20+

Other data and information from the survey indicate that respondents' perceptions about the quality of facilities and services, the need to analyse new opportunities and develop new approaches to take advantage of new opportunities, invest in development etc. were quite positive. The major difference between the Northern Tasmanian study and a similar study in SW Victoria was the direct involvement of each Council through the NTMO and the apparently higher level of confidence in Northern Tasmania. Also the NTMO Recreation Committee steered the industry study and undertook it as part of a more comprehensive regional planning project; consequently Northern Tasmania's sport and recreation industry is likely to be more receptive to the development of an industry development strategy plan.

Industry Strategy as a Vehicle for Socio-Economic Development

As a vehicle for socio-economic development, the sport and recreation industry can contribute in the following four broad ways:

1. Offering services that result in a net inflow of wealth,
2. Reducing the need to buy in services from other regions,
3. Combining with other primary and secondary activities to incubate 'new products', and
4. Service innovation designed to promote and enhance the region's social capital.

Much of the thinking behind these ideas is underpinned by the notion that the regional sport and recreation market--community provides the environment and the people for product and service testing. Consequently, special efforts are required to create feedback, comments and suggestions about developments and innovations that are planned and then implemented in the sport and recreation industry.

The industry study results suggest the following broad strategies should be considered:

1. Membership drives to lift the membership and volunteer base of many organisations due to the proportionately low membership in some sectors of the industry.

2. Consolidation and amalgamation of certain sports and recreations due to declining populations in some sectors of the industry and the potential for pooling resources.
3. Marketing the desirable attributes of active participation to young people, in addition to overcoming access barriers in terms of timing, pricing and transport issues (e.g. car pooling by parents/guardians, changing days and times for training and playing to suit participants rather than tradition, appropriate concessions and junior membership fees, coaching and special days on which senior players guide and assist juniors etc.).
4. Targeting older adults--retirees by way of providing professional retirement planning advisory services and assistance in accessing appropriate leisure and therapeutic recreation services to encourage local investment as older people move into retirement villages etc. and seek access to alternative forms of recreation.
5. Improving access to sport and recreation services for parents (e.g. by way of facilitating child care etc. for parents/guardians who wish to access sport and recreation services).
6. Improving accessibility of sport and recreation services for special needs groups (e.g. by contacting and working with advocates for the disabled, indigenous Australians and migrants / refugees with limited English).
7. Customer focussed training in many organisations to help improve the range and quality of services provided to participants, members and customers (e.g. creating notice boards, implementing newsletters, writing occasional articles for newspapers, providing refreshments and/or vending machines, etc.)
8. Administrators' and volunteers' training courses to enhance the professionalism, enthusiasm and interest in improving the potential of many services and organisations to widen the customer/participant base, in addition to improving the planning needed to compete for and obtain external funding and invest in facility improvements.
9. Collaboration with retailers to encourage the mutual benefits of joint wholesaling, networking with clubs and associations to create community newsletters, encourage sponsorship, assist fund raising, enhance promotional campaigns and establish partnerships between local government and small businesses and their associations etc.
10. Collaboration with business to explore the possibilities, potential, feasibility and viability of different industry development opportunities and options for innovative service and product developments.

The industry study results can be analysed further to create more refined and specific strategies for targeting, focussing on and evolving different industry sectors and markets but this should not occur until such time as an overall industry development strategy is developed and takes account of industry sectors, their respective markets, the nature of existing organisations and the levels of supply and demand which exist in each sector of the industry. This more in-depth analysis would consider income sources, annual turnover, years of establishment, participant/customer needs, ability and willingness to pay etc. and would enable the development of marketing plans and appropriate promotional objectives and actions that need to be implemented according to the right mix of service and product developments for each industry sector and their target markets.

Strategic Directions in Regional Sport & Recreation Industry Development

The regional sport and recreation industry development strategy should be based on a sustainable industry development vision which seeks to improve quality of life, maintain and carefully extend current facilities according to identified needs and assessments of supply and demand, improve infrastructure related to accessing and using facilities, enhance sport and recreation services through education and training which considers user satisfaction according to social, physical, emotional and spiritual factors and protect and conserve the natural resources used by the sport and recreation industry.

The strategy should use the data collected by this study as the basis for creating indicators of regional sport and recreation industry activity, user preferences, service patterns and pointers towards potential impacts of the regional market--community - that is its sport and recreation activities - on the environment. In addition, it should emphasise the need for local--regional leadership, inter-disciplinary planning, broad cooperation by management, joint industry--government facilitation and targeted financial and technical assistance to effectively promote sustainable sport and recreation industry development as a complement to the broad goal of achieving social well-being, rather than narrow definitions of economic well-being.

The regional sport and recreation industry development strategy should consider the following program elements:

1. Sport and recreation business / organisation development programs for different communities of recreational interest and related markets, in addition to start-ups and possibly small sport and recreation business incubation centres.

2. Existing sport and recreation services - public, private and voluntary.
3. Town and main street sport and recreation retail outlets and their ability/willingness to cooperate (e.g. joint wholesale buying, events sponsorship / promotion, newsletters, and notice-boards that pay specific attention to particular sports and recreations etc.).
4. Minority group and female sport and recreation industry developments.
5. Eco-recreation/tourism (i.e. bushwalking, abseiling, canoeing, caving etc.) and their impacts and necessary regulations and restrictions required to conserve/preserve regional natural resources.
6. Connections between tourism marketing and sport and recreation industry marketing.
7. Events and major event management.
8. Selective quality recruitment, training and professional development.
9. Continuing analysis / planning / leadership.
10. Regional partnerships / cooperative developments.

Some information on these was collected by the regional sport and recreation industry survey whilst other elements were obtained from other sources *(See Section Entitled 'Adding Value from Other Sources').* The broad trends and perceptions impacting on demand and supply in the regional sport and recreation industry were identified and used to create a framework for thinking about opportunities for, and threats to, sport and recreation industry development. The process of creating the industry development strategy should continue to use SWOT (strength, weaknesses, opportunities and threats) analysis as a strategic management tool in the formulation and continual review of the strategy. In addition, the industry development strategy should emphasize:

1. The legitimacy of government partnerships with sport and recreation organizations
2. Provision of leadership in sport and recreation industry development within local areas and across the region;
3. The concept of industry development occurring within a framework of sport and recreation aims, objectives and targets;
4. A social--economic focus to industry planning with a research base for measuring development and community needs and monitoring improvements;
5. The need to facilitate inter-sport and recreation links between local public, private--commercial and voluntary organizations;
6. The development of a shared vision and strategy for sport and recreation to overcome decline, fragmentation and gaps in sport and recreation services; and

7. The social and economic benefits to be gained from developing the sport and recreation industry.

Recommendations From the Industry Study

1. That the NTMO use this report, the study results and associated research tools and techniques as part of the regional industry planning framework, policy making and decisions required to establish an appropriate regional sport and recreation industry development strategy and planned initiatives.

2. That the NTMO, through appropriate professional support, draft a sport and recreation industry development strategy within the next few months, using the study results, data, analysis, indicators, benchmarks and strategic ideas provided in this report (and related reports from the Future Game Plans project) and then make it available to industry stakeholders for comment before final review and endorsement by the NTMO as a guide to decision making on regional sport and recreation industry policy initiatives being pursued by the NTMO.

3. That the NTMO, through its Recreation Committee, encourage the State Government, through the Office of Sport and Recreation (Tasmania), to adopt a statewide system for tracking and measuring sport and recreation industry development consistent with, if not using, the same tools and techniques applied in this study to demonstrate regional leadership and to facilitate identification of appropriate support and assistance from the State and Federal Governments within their regional development policies and associated funding initiatives.

4. That the NTMO, through its Recreation Committee, structure an industry development strategy with a clear introductory pitch to key industry stakeholders (i.e. each local Council and all sport and recreation organisations), a concise, uplifting and sustainable regional sport and recreation industry development vision, aims that provide direction, objectives that spell out steps, desirable results, target markets--communities, specific development proposals, an impact assessment and consultative process, an implementation timetable, an appropriate form of monitoring and a realistic budget.

5. That the NTMO commit to a professional approach by way of identifying the human and technical resources, the budget and a realistic time frame required to consolidate partnerships between government and industry necessary for

establishing and implementing a regional sport and recreation industry development strategy.

Section 1 - Introduction to the Regional Sport and Recreation Industry Study

The Project Brief for the Industry Study

This project is one part of a multi-faceted study designed to develop a regional sport and recreation planning framework and associated industry development strategy. The industry study project brief stated that:

' ... The research is to provide quality statistical information on economic aspects of the Northern Tasmanian recreation and sport market. The information / data will be used by Local Governments, the Office of Sport and Recreation and industry stakeholders to:

> *Develop regional and local recreation plans*
> *Identify economic opportunities, threats, trends, issues;*
> *Establish and monitor the economic impact of the recreation and sport industry at a regional level;*
> *Supplement existing state-level economic data;*
> *Promote the economic and other benefits of recreation and sport to create a better appreciation among planners, managers and decision makers ...'*

Consequently the industry study required significant effort to develop (a) the theoretical background *vis a vis* factors and forces that need to be considered in understanding sport and recreation markets and what we mean by the sport and recreation industry and (b) the practical measuring tool (or survey instrument) that could be used to measure economic change and development of the sport and recreation industry. The study report therefore presents contextual information in the initial sections as the theoretical framework, then it provides details about survey design, administration and implementation in the middle sections, followed by data collected, indicators created and the analysis associated with these things. The latter section provide relevant details for, and guidance on, strategy development.

The Overall Regional Recreation Planning Project 2000: "Expected Deliverables"

The '*Future Game Plans'* overall project goal states that the Recreation Committee of the Northern Tasmanian Municipal Organisation will consult the recreation and sport industry and then endorse for implementation a recreation planning framework. In seeking to establish a recreation planning framework the objectives of the overall project were:

> To adopt a planned approach to recreation industry development.

To improve the viability of the recreation industry.
To improve cooperation in facility and infrastructure provision and maintenance.
To facilitate increased community participation through improving recreation opportunities. (and)
To identify and pursue increased funding opportunities and a common vision through working and communicating together cooperatively.

The individual projects within the overall project were to be produced in a relatively short period of around six months within overlapping phases. Phase One was to produce two reports; one as a review of regional recreation planning from 1980 to 1999 and the other as an analysis of recreation participation and demographics in Northern Tasmania. Phase Two was to produce three reports; one as a regional recreation facilities inventory, the second as a data base of organisations and events and the third as this industry study report based on an economic analysis of the regional sport and recreation market. Phase Three was to produce two more reports; one to identify issues, needs, demands and make an assessment of these and the other as recreation planning and policy guidelines. Phase Four was to bring together the findings of these seven reports and provide a strategic recreation plan for Northern Tasmania.

The key outcome of the overall project was to be a composite of the eight reports and was expected to deliver a recreation planning framework for Northern Tasmania underpinned by:

quality information,
assessments of regional sport and recreation needs,
guidance for the development of relevant systems and policies,
strategies for marketing opportunities and facility provision,
opportunities for better management of infrastructure, facilities and services,
links to existing plans and strategies and
the identification of a regional context.

This final outcome is anticipated to follow the industry study and may include provision of a draft for community comment prior to formal endorsement by the NTMO Recreation Committee.

The Industry Study: A Planning Tool in Industry Strategy Development

The industry study (to create Report 5) is therefore designed to contribute to the development of the strategy and actions required for sport and recreation industry development. It focusses on economic aspects of sport and recreation industry development primarily by seeking to measure the perceptions of key people in the industry including an assessment of their views on industry development. An major assumption of the study was that the sport and recreation industry could be defined (despite it being a relatively new and amorphous concept) and that its 'development' could then be measured. The industry was taken to be constituted by the types of organisations listed below:

Private (i.e. owner, contractor or lessee);
Public (i.e. local, state or federal government owned/controlled);
Voluntary (i.e. owned / managed by members); and/or
Philanthropic (i.e. based mostly on 'fund raising', e.g. service club) agencies.

The key people from which the information about industry development was to be obtained, that is the decision makers or industry leaders, in these types of sport and recreation organisations were taken to be: managers / directors / coordinators; accountants / administrators; operators / service providers; marketers / promoters; presidents; secretaries; treasurers and committee members.

The industry study also draws on Census data from 1986, 1991 and 1996 to identify a range of local and regional indicators, such as income and educational trends, in addition to information that was available about identified community needs (i.e. that focus groups report), relevant local strategic policy (i.e. the Break O Day's Sport and Recreation Plan) and guidance about developing strategy and collecting relevant information about the sport and recreation industry.

In taking the decision to undertake a regional planning project on the sport and recreation industry the NTMO and its Recreation Committee, in effect, challenged the *status quo*. The decision meant that *ad hoc* planning would be replaced by more systematic attempts at planning the development of sport and recreation. Change of this nature is often challenging to various interests that have become (or remain) comfortable with the *status quo* and *ad hoc* planning. In this sense these interests might be described as *'anti-planning'* and might oppose some of the ideas put forward after the studies are completed and reports are presented. Despite possible opposition the NTMO Recreation Committee obviously believed it to be imperative to move towards strategically thinking about achieving a better future for sport and recreation in the region. The so-called current conventional wisdom on which opposition might be based tends to argue that an industry and its consumers should be allowed to take care of themselves because the *'invisible hand'* of the market controls supply and demand.

The table below is therefore offered as part of an interventionist framework on which the industry study is based to assist in understanding the theoretical values and strategic thinking that surrounds the industry study. The table identifies what is described in column 1 as *'conventional wisdom'* which is being challenged by column 2 described as *'new strategic thinking'* about developing the sport and recreation industry. The details provided under each column heading are to facilitate development of ideas about possible new directions and opportunities created when government pursues *partnerships* in the sport and recreation industry and reaches markets as if they are different communities of participants with varying boundaries and catchments beyond local areas and sometimes beyond the region. Each local market (or sub-community) has or is adjacent to unique assets with different levels of development, particular climates and special characteristics that need to be variously maintained, improved, conserved and/or protected according to particular economic, social, environmental, heritage, cultural and other *values* to the sport and recreation industry. Experience overseas in recent successful economic development strategies suggests that partnerships between industry, government and community groups can generate new strategic planning and management directions, particularly in service industries such as sport and recreation, which have led to development of those industries.

Diagram 1: Strategic Thinking About Sport & Recreation Industry Development

"Conventional Wisdom"	"New Strategic Thinking"
The government that governs best governs least	Government is an essential partner with the private sector in making strategic investments in people, institutions, infrastructure and protection of assets.
Rural regional economies and industry are in permanent decline.	The rural -- regional sport and recreation industry is capable of growing (e.g. through major events, eco-recreation/tourism, innovative programs etc.)
Strategic policy should focus on one area (e.g. major events' management and development).	Sport/recreation industry development, like charity, begins at home and should not be dependent on one type of development in the industry.
Capital and tax incentives and subsidies to sport and recreation businesses work.	Capital and tax incentives and subsidies don't buy a competitive edge.
To succeed at industry development, target efforts at the right activities.	It's not targeting that counts, it's innovation, training, entrepreneurship and flexibility.
When it comes to economic development, regions must choose between economic growth and equity.	Economic growth and equity are not only possible together, they actually reinforce each other.
Unions and workers with high expectations are part of the problem, not the solution.	It is the quality of labour management interaction and continuing professional development that are crucial to business strength.
Only low wages and low taxes can offer sport and recreation businesses a competitive edge.	Competitive businesses are attracted to and grow according to access to natural assets and physical infrastructure.
Regulation in all its forms retards sport and recreation industry growth and development and drains well-being.	Regulation and economic growth need to proceed hand-in-hand to sustain recreation industries (e.g. recreational fishing, shooting, bushwalking etc.)

(Note: Adapted from HallidayJ.M.)

The benefits that can accrue to communities as a result of moving towards strategically thinking about sport and recreation industry development include but are not limited to the social--economic benefits listed below:

Allows communities to value and identify with their built and natural assets;

Provides the catalyst for social interaction and community development;

Creates self sufficiency and keeps a large percentage of locally spent funds in the local area and region;

Tends to be non-exploitative depending on the quality of planning, level of regulation, and the commitment to education, training and raising local awareness;

Creates employment opportunities for coaches, trainers, facility managers; programmers, retailers, developers, sports administrators, peak body coordinators etc.

Facilitates joint ventures between communities, governments and private enterprise to develop facilities in terms of maintenance, improvement, extension, expansion, conservation and preservation according to the type of asset on which a sport or recreation is dependent;

Provides opportunities for other businesses such as architects, bankers, builders, carpenters, doctors, dentists, fishermen, garage operators, gardeners, hotel and motel owners and employees, insurance agents, petrol station operators, plumbers etc.;

Preserves the assets and the environment if proper management, effective policies and planning are implemented to assess impacts and regulate the usage levels (numbers, catch limits etc.) and types of uses (i.e. training, competition, seasonal, occasional use for major events etc.) by different sports and recreations;

Broadens the local / regional social outlook by way of increasing the interaction between local people and visitors - competitors and participants - who come into a local area for a sport or recreation; and

Leads to improved infrastructure such as upgrading of roads, paths, parks, reserves, boat launching ramps and piers, amenities (public toilets, change rooms etc.) and ancillary facilities (seats, tables, shelters, water fountains etc.), playgrounds, sports areas and camping areas etc.

Defining Data, Indicators and Measures of Industry Development

In seeking to develop a strategy for the sport and recreation industry, the NTMO Recreation Committee is effectively developing a 'benchmarking' process using a survey instrument as a tool to facilitate the creation of measures of industry development. Measures of industry development can be clear and concrete with specific objectives about promoting investment, cooperation, government support, assistance and innovation in the industry. Measuring the achievement of these objectives has begun by measuring perceptions about facilities, levels of membership, participation and custom, types of activities and services provided. The measuring tools are applied according to standard procedures that, in this study, involved the administration of a self completion questionnaire and telephone interviews using the same questions in the questionnaire. The study could therefore be the beginning of a process that extends across the whole of Tasmania and could facilitate wider sport and recreation industry planning by:

a. Identifying and establishing useful data to assist research and planning in the industry,
b. Laying the foundation for regular assessment of views and perceptions in the industry,
c. Gauging development according to those perceptions,
d. Evaluating views on industry development,
e. Encouraging inter-sport/recreation cooperation with local and state governments,
f. Improving the potential for support and assistance towards the industry, and
g. Facilitating the link between results and a systematic planning--development process.

Model indicators that could, in the future, be developed and linked to these industry development principles are suggested in the diagram below as answers to the question - What are we trying to achieve?

Diagram 2: Examples of Indicators - What are we trying to achieve?
DEVELOPMENT - AN INTEGRATED STRATEGY TO ASSIST INDUSTRY DEVELOPMENT.
Confidence - Increased confidence within the sport and recreation industry.
Integration - The potential for a broad, integrated & developmental industry wide vision.
Innovation - Identification of innovative organisations and areas of industry upon which to focus support.
Interest - Interest in the formulation & development of strategic plans and government support.
Cooperation - The level of cooperative effort that can be established by and in the industry.
Impediments - Identification of impediments to venture capital and industry driven research efforts.

Examples of industry wide and organisation specific data that can be collected and are connected to such indicators are spelt out in the diagram below as answers to the question - What data enables the creation of measures?

Diagram 3: Examples of Data Required - What data enables the creation of measures?	
Examples of industry wide data	Examples of organisation specific data
Industry development data (incl. ABS)	Level of participation/custom identified.
Amount of payroll/turnover in industry.	Patterns within industry sub-sectors, e.g. sports.
General level of industry development.	Organisation types by development.
Estimated number of organisations in the industry.	Reasons/causes for change, i.e. rise/decline.
Actual contribution of industry c.f. other industries.	Organisation investment/divestment.
Total employment in the industry.	Notes on internal/external influences.

Note: c.f. = compared with

Complementing the diagrams above is the diagram below which sets out steps in the creation of measures and indicators consistent with the requirements and implementation of the industry study within overall sport and recreation planning project.

Diagram 4: Model Steps for Creating Indicators/Measures of the Sport & Recreation Industry			
Objectives	Make Assessments	Tasks Required	Timing
1. Counting organisations	Can all relevant organisations be identified?	Identify sources for listing total population	Sample design stage
2. Measuring level of industry development	Can each organisation's level of development be assessed in some way?	Calculate turnover and/or payroll.	Through ABS Business Register; also in 1st contact.
3. Measuring and classifying views and perceptions	Are they developing services? Are they investing? Are their views similar? Are they innovating? Could they cooperate? What support is appropriate? Could they participate in policy development?	Review and analyse data collected from the survey and report according to views & perceptions on industry development.	Regional Survey
4. Sharing and benchmarking information	Is the data collected compatible with other data sets and is the industry responsive? (Reference to NSRISF & ANZSIC*)	Compare with ABS Business Register & Census. Create definitions of industry development & assess willingness of responses to initial study.	After Regional Survey
5. Assessing Data Base goals	Can the survey tool to collect data from organisations in the sport and recreation industry by regions be further refined?	Refine survey process: administer, analyse data and provide industry data base by regions.	After Regional Survey.

Notes: * NSRISF = National Sport & Recreation Industry Statistical Framework and ANZSIC = Australian and New Zealand Standard Industrial Classification

Agreement on the Industry Study: Results, Outputs and Limitations

The NTMO Recreation Committee decided at the outset that the industry study was to be largely based on a previous survey instrument designed for and with Sport and Recreation Victoria to minimise design time, enable efficient implementation and provide comparative data with other regions in Australia. The study results were to:

Enable an assessment of the social--economic value and benefits to the region provided by recreation and sport industry.

Estimate Local Government expenditure on the recreation and sport industry and compare this to similar regions within Australia.

Project future requirements and levels of confidence in respect of employment, volunteer needs and facility development plans.

Estimate the number of paid employees

Estimate the number of volunteers, volunteer contribution in hours and nominal value in dollar.

Estimate the number of sport and recreation businesses which have paid employees.

Estimate the gross income for businesses operating exclusively in the sport and recreation industry.

Estimate the expenditure on organised sport and recreation activities, including an average per participant.

Provide details of 'other information' supplied by respondents to the survey.

Negotiations during initiation of the industry study led to agreement that the study would enable a social--economics analysis rather than a pure or orthodox economic analysis. Consequently an economist may be required, after the industry study, to undertake further analysis for the NTMO Recreation Committee. Comparisons were agreed to be made with the South Western Region of Victoria where a similar study that had been done for Sport and Recreation Victoria. Comparisons with the South West Victorian Region are appropriate as it is largely rural with some urban areas such as Geelong, Colac and Portland which are similar to Northern Tasmania's urban areas of Launceston, Scottsdale and Bridport.

Projections of requirements and confidence in respect of employment, volunteers and facility development were to be answered by various survey questions to identify levels of employment and volunteer involvement and to seek some details about facility development plans. Survey questions were also designed to provide some ideas about market related trends over the past 5 years but 'trends' and 'projections' were understood to be different concepts in that trends can be simply extrapolated whilst projections require a specific set of assumptions to be identified.

Population projections, which rely on standard assumptions such as birth rates, survival rates and in/out migration rates (the latter of which currently relates to rural decline and broad acre urban development etc.), would add value to the proposed market projections to help identify sub-markets that need to be analysed according to likely demand and levels of participation in sport and recreation. Arising out of this analysis the NTMO Recreation Committee would need to consider strategic marketing and promotion campaigns to assess awareness and interest in particular recreation and sports products (as locally manufactured recreational goods, new or innovative recreation services). A question asks about 'expectations' and 'hopes' of further development of facilities; these concepts were also understood to be fundamentally different. Expectations might imply that plans exist in some form; on the other hand hopes might imply only a level of enthusiasm for further development rather than having actual plans which was to be partially derived from other questions in the survey but these questions focus only on facility development.

The estimated number of paid employees and number of volunteers was to be calculated from questions on the number of volunteers and their contribution in hours with a nominal value in dollars used to calculate figures from the final two questions in the survey. The sport and recreation businesses which have paid employees could be calculated from the survey results, as could gross income for businesses operating in the recreation and sport industry, although the study requirement of these businesses being 'exclusive' to the sport and recreation industry is qualified by the industry definition and statistical framework adopted by the study.

Expenditure on organised sport and recreation activities, including an average expenditure per participant was to be calculated and catchment areas were to be identified. Finally, analysis of sources of income was to add value to the results and associated analysis of expenditure.

The study limitations therefore relate to the speed with which the study was undertaken, the limited opportunity for consideration of the other parts of the overall study and their usefulness to the industry study. Secondly, there was no direct interaction between local groups and the consultant so constructive improvements this can generate in a study of this nature were not possible. Finally, the study was actually a pilot in the region and needs to be assessed as such to ensure that any lessons learnt are usefully applied in future similar research processes.

Section 2 - Research Context: The Regional Sport and Recreation Market

Social--Economics Perspective on the Regional Sport and Recreation Market

A social--economics perspective on the regional sport and recreation market requires an understanding of general leisure patterns and trends, levels of participation in sport and physical activities and the broad social and economic changes that are impacting on recreation. Arising out of this understanding we can begin to identify the key planning issues in terms of their impact on recreation planning. Key factors that influence the nature, role and function of sport and recreation to local and regional economic development are largely based on the:

Culture of the community, its history, preferences, rules and taboos;
Economic status and well-being within the local, regional, statewide, national and global contexts;
Environmental conditions (such as weather and climate) and natural assets (such as waterways and terrain);
Trends in local sports participation and recreational interests; and
Demographic trends and characteristics of each LGA and the region according to age groups, income and ‘wealth’, employment levels and types, employment by industry categories, education and qualifications etc.

This study begins the process of systematically collecting and monitoring relevant details of these factors so that the changes which may impact on the sport and recreation industry, in terms of perceptions, views, needs and demands, can be identified and evaluated to ensure effective responses are planned and implemented. The sections provided below expand on the broad areas of understanding that are initially required to create a social--economics framework for strategically analysing data and thinking about what can and should be done to facilitate sport and recreation industry planning and action to encourage appropriate sport and recreation industry development.

General Leisure Patterns and Trends

Leisure patterns have always had a close relationship to the kind of opportunities available and the awareness of these opportunities. To an extent, participation patterns in communities are shaped by the facilities provided and promotion of these rather than simply by demand. So, Australian communities have developed a pattern of sport and recreation participation which tends to centre upon available assets: parks and reserves, sporting fields, facilities (such as golf courses), beaches and, especially in Tasmania, on national and state parks, rivers, lakes, coastal and wilderness areas. This has been accompanied by the private sector provision of entertainment services such as cinemas, cafes, shops / retail outlets (which are tending towards specialisation in sport and recreation goods and related services), restaurants and hotels. Hidden below the surface, there is an immense proliferation of clubs and organisations and a great diversity of home-based recreations and leisure interests.

Probably the most global shift in recreation patterns is the way in which economic demands have become the primary organising principle. Recreation services have generally been forced to adopt commercial models of practice and, increasingly, sport and recreation are becoming products which are packaged and sold. Other changes are occurring. Gambling has increased immensely throughout Australia. Whether or not one approves of the shift in gambling provision is virtually irrelevant; the key problem for recreation managers and entrepreneurs is that people have less money and time to spend on other forms of recreation.

Generally, less attention is being devoted to actual participation in the highly competitive outdoor sports in favour of greater involvement in night time and indoor sports. At the same time, more people are television spectators and less are actually participating. New patterns in recreation are often based on new technology. Although computers, with their games, multimedia and the Internet, are increasingly popular, we have yet to see the full impact of this popularity. Recent media reports (mid 2000) suggest that half the Australian population has direct access to the Internet. Clearly, more people are being diverted from other pursuits to these new technologies.

This might suggest that the most recent reports on time use from the Australian Bureau of Statistics (ABS) are rapidly becoming outdated but are still worth noting. Their time use surveys suggest that:

'At the broad level of people's time use, there has been little change between 1992 and 1997 ... Men and women spend their day in different ways. On an average day in 1997, men spent 20% of their day on recreation and leisure, 18% in employment related activities and 7% on domestic work, while women spent 18% of their day on recreation and leisure, 13% on domestic work, 9% on employment related (activity) and 3% on child care ...' (ABS, 1997:2)

But further analysis provided by the ABS about Free Time compared to Necessary (or obligated) time suggests significant change could be occurring in trends and patterns of time use, for example:

'... On average, people who lived in rural areas spent less time on free time activities than those who lived in either major urban areas or other urban areas (508, 555 and 568 minutes [per day] ...' (ABS, 1997:8). They spent less time in television viewing, reading and participation on 'other free time' activities (which includes relaxing, 'doing nothing', thinking and interacting with pets) (ABS, 1997:8).

On Sport the ABS found that:

'... From 1992 to 1997, there was a marked decline in Australians' involvement in formal and informal sport. On an average day there was little change in the average time spent but the participation rate for men fell from 12% to 9% and for women from 5% to 4% ...The decline in involvement in sport ... between 1992 and 1997 was most noticeable for those aged 15-24 years. The average time spent on sport for 15-24 year olds fell from 22 minutes to 16 minutes per day, while their participation rate fell from 18% to 13% ...' (ABS, 1997:8-9)

On leisure the ABS found that:

'... The average amount of time people spent on recreational pursuits decreased by 90 minutes from 1992 to 1997 ... On an average day, 8% of men participated in computing (as a hobby or playing games), compared with 4% of women, and spent 3 times as long (9 minutes compared to 3 minutes). However, women spent more time than men on handwork and crafts (9 minutes compared with less than 0.5 minutes), and talking (128 minutes compared to 101 minutes) ...' (ABS, 1997:9)

In general women in rural areas tend to spend significantly more time than men on household and community activities, particularly domestic activities, child care, purchasing goods and services and less time in the labour force. On the other hand twice as many men as women do home maintenance (17% of men compared to 7% of women) and they were spending longer on these activities, with 31% of men spending 120 minutes or more per day on home maintenance. Males and females spent approximately 20% of their day time on social and leisure activities during weekdays and around 30% (for women) and 33% (for men) of day time in the same activities on weekends.

In conclusion, these details lend support to the case for significant effort by Government in relation to sport and recreation industry development, service provision and programs to promote participation in sport and recreation, especially by young people but also by women and men. The strategies that need to be considered range from simple to complex, for example from changing days and times for coaching, training, playing, participating and competing through to marketing and promotion that focuses on changing the attitudes and behaviours of young people and adults who have been either attracted to other pursuits or no longer participate - directly as players or indirectly as volunteers.

Participation in Sports and Physical Activities: An ABS Guide

This information is extracted from the latest Australian Bureau of Statistics (ABS) catalogue which documents the most recent national study on '*Participation in Sport and Physical Activity - 1998-99'* (Catalogue 4177.0). The data were obtained from information collected during the Population Survey Monitor (PSM) and relate to participation in the twelve months prior to the interview. The PSM is a quarterly household survey conducted throughout Australia, with government agencies funding topics of their choice. Results from the quarterly surveys are collated to produce annual estimates. The term ‘participant’ is defined as a player or a person who physically undertakes the activity. It excludes coaches, instructors, umpires and committee members. The participation characteristics generated by the study suggest that:

Around 60% of persons aged 18 years and over participated in sport or physical activities.
Males have a higher participation rate (63%) than females (56%).
Participation rates are highest for the 18 to 24 year age group (males 82% & females 79%) and declines steadily with age. The rate for persons aged 65 years and over was 37%.
Australian born persons were more likely to participate than persons born overseas (62.5% compared to 52%).
Nearly one third (30%) of persons had participated in a club or association organised sport or physical activities. Around three fifths of these also took part in non-organised activities.
29% of persons participated solely in non-organised activities.
The proportion of regional residents who participated solely in sport or physical activities (58%) was lower than the corresponding proportion living in capital cities (60%).
27% of persons participated in a sport or physical activity as members of a club or association whose primary focus was the activity concerned. Over 60% of these also participated in other sport or physical activity but not as club members.
32% of persons participated in sport or physical activities solely as non members.

Sports and physical activities that attracted most participants were walking, swimming, aerobics/fitness, golf and tennis. For *organised activities*, the top group in Tasmania was walking, swimming, golf, aerobics/fitness, fishing, netball, tennis and running.

Table 1: Participants, Selected Sports & Physical Activities - Tasmania			
Sports & Physical Activities	% Male	% Female	% Persons
Aerobics/fitness	6.2	12.8	9.6
Aussie Rules F/ball	4.8		2.4
Badminton	2.2	1.1	1.6
Basketball	2.4		1.5
Billiards/snooker/pool	3.6	1.3	2.4
Cricket (O/D - I/D)	4.8		2.6 - 1.2
Cycling	6.6	2.9	4.7
Fishing	13.8	2.4	7.9
Golf	18	3.7	10.7
Horse riding		2.2	1.5
Lawn bowls	3.5	1.3	2.4
Martial arts	1.9	1.8	1.8

Netball		4.2	2.8
Running	6	2.5	4.2
Sailing	1.5		1.2
Scuba diving	1.1		0.7
Shooting sports	1.9		0.9
Squash/racquetball	3		1.9
Surf sports	1.9		0.9
Swimming	10.5	16.6	13.6
Table tennis	2.1		1.2
Tennis	4.4	4.5	4.4
Ten pin bowling	1.5	2.1	1.8
Walking	20.7	31	25.9
Weight training	1.6		1.1

These rates can assist in calculating local participation numbers subject to qualifications such as the availability of local facilities or opportunities, that is, a sport that has no local and/or regional facilities or opportunities is unlikely to have the same participation rates as a sport or recreation that does have local facilities or opportunities (e.g. participation in ten pin bowling is likely to be much lower in Break O Day because there are no bowling alleys whilst levels of individual participation in 'surf sports' is likely to be highest along the coast).

The trends identified for organised sport suggest that approximately three-tenths of Australians aged 18 years and over take part in sport and physical activities organised by clubs or associations. In the 12 months prior to 1996-97, the participation rate was 26.5%, while for the 12 months prior to 1998-99, the participation rate was 30.3%. In terms of persons involved, the number of participants has increased from 3.5 million to 4.1 million over that time. These figures are inconsistent with Tasmania's participation rates in that Tasmania's participation dropped between 1997/98 and 1998/99 and this is cause for some concern to industry development ambitions and suggests a need to emphasise the benefits of participation but also identify the causes for the decline (e.g. declining median incomes and rising costs/prices etc.). It is noted that the ABS report identified some possible problems with directly comparing figures for each year so the statistical decline may not be overly significant.

Table 2: Organised Sports & Physical Activities - Tasmania by Sex/Persons				
Year of Study	Male	Female	Persons - Tas.	Persons - Aus.
1996 to 97	33.8	25.3	29.4	26.5
1997 to 98	36.3	29.8	33	28.3
1998 to 99	35.6	27.6	31.5	30.3

Participation rates in Tasmania, like the rest of Australia, decline with age for both sexes and match expectations that exist about declining physical ability and fitness.

Table 3: Participants, Sport & Physical Activities, Tas. by Age/Sex			
Age Group	Males	Females	Persons
18 to 24	80.3	75.6	78
25 to 34	81.9	62.9	72.2
35 to 44	66.3	56.1	61.2
45 to 54	57	59.7	58.4
55 to 64	43.5	53.3	48.4
65 and over	41.8	31.5	36.1
All Persons	62.6	55.5	58.9

The widespread public interest in and concern about health issues has meant the sport and recreation industry has largely developed and promoted 'physical fitness' centres, leaving much room for the development of 'healthy lifestyle' services and opportunities. The physical fitness sector of the sport and recreation industry is based on the partially false assumption that physical fitness and health are synonymous. Increasingly people are realising that good health demands a very different approach to simply increasing physical fitness. This same level of awareness and interest has yet to develop in relation to gambling in many rural areas, its impacts on community well-being and family life, and what government responses and interventions are appropriate.

The last 20 years have provided a much greater range of leisure options but a much smaller change in the total number of hours spent in participation, thus, roughly the same number of person-hours have been dispersed over a wider range of options and because sport and recreation are very significant categories of private sector investment, increasing attention has been given to competitive marketing of facilities and services. This is now changing even more as hours of participation are decreasing, yet the demand for increasing diversity still continues.

Deregulation has tended to mean shopping hours have been extended into evenings and weekends so an increasing amount of time that might have once been devoted to other recreation activities is now spent on visiting shopping strips or centres. The effects of these changes, including commuting to go shopping (and soon Internet shopping) are yet to be fully realised in many local areas.

In thinking about leisure trends, one must commence with the broad socio-economic and environmental issues which impact upon all aspects of lifestyle. Australian society is experiencing the most dramatic changes of anytime in the past century and regional communities, as part of the whole, are becoming important areas of planning attention, especially in States like Tasmania, where much traditional rural economic activity has declined in favour of rising service industries such as tourism and outdoor recreation providers who focus on fishing trips, bushwalking, adventure tours and major events etc. At the same time there is a *'sea-change movement'* of families seeking out and buying blocks in rural areas and an ever growing mobility through use of private vehicles for commuting catered to by large investments in private transport.

Tourism is becoming more important as a component of local--regional economies, whilst, at the same time, services have been reduced (in particular State Government services) in the moves to smaller government. This may slow down due to the change of emphasis by central governments resulting, in part, from the regional--rural rejection of governments such as in Victoria's recent State election (1999). Also the Commonwealth Government is showing signs of targeting rural areas and regional economies to assist in reversing or intervening in the overall trend of rural economic decline by providing funds targeted towards rural areas, most specifically in the recent Commonwealth Budget (2000) to improve access to General Practitioners but also to improve allied health services and facilities.

Technology is still having an impact on the workforce and there is increasing awareness of environmental degradation based on unsustainable industries, land and water uses. Catchment management authorities and national and state park management services are showing evidence of increasing awareness about the impacts of recreational use on waterways, national and state parks, especially the riparian zones and related native flora and fauna, by developing strategies to regulate the levels and types of recreational use of those areas.

Consequently, predictions about future directions in the sport and recreation industry can only be made with small degrees of confidence. Now, more than any time over the past century, the best sport and recreation planning and development decisions will be those which provide the greatest scope for future flexibility and adaptability whilst also attempting to increase broad understanding of what industry development strategies are most appropriate - region by region.

Broad Social and Economic Change Impacting on Recreation

There are various other changes which are occurring concurrently and add a further dimension to the dilemmas for sport and recreation industry development and strategy planning. Most, if not all, townships in Northern Tasmania, like many Australian communities, are ageing due to longer life expectancy, low birth rates and - to some degree - higher quality aged services. These factors have their own impact upon the economic climate but it also shifts priorities in community recreation service provision. Households are changing in character. Young people are more likely to either live at home with their parents for longer and then move to group or single-person households rather than get married and establish a family. In Northern Tasmania many young people are having to move to urban centres to gain access to higher education facilities or to gain access to employment opportunities.

Continuing change in the place of women in society has had a wide range of impacts. Higher workforce participation, extended education, increasing sole parenthood and greater economic independence will continue to influence society in the future. This change probably reinforces the uncertainty felt by men about their own roles. Implications of these changes include a larger formal workforce, increasing need for child care, later marrying and delays to having children. It has certainly led to major changes in family structure and functioning and resulted in major changes in public behaviour, including the recreation patterns of many women who now, more often, choose traditionally male dominated sports such as rowing, martial arts, cricket, fishing and surfing etc.

There has been a growing public interest in and concern about environmental quality ranging from local issues such as streetscapes that are more aesthetic and landscaped, playgrounds for children and supervised play areas, parks and reserves for recreational walking and walking dogs and waterways for fishing, canoeing, rowing etc. to concern about global issues such as energy consumption, pollution of the ocean and potential global warming. In the event that Northern Tasmania was not to receive adequate rainfall the hydro powered electricity generators would be replaced, as an interim back-up measure, by alternative forms of electricity generation which are seen to pollute the environment. These and other things could mean Tasmania's and the Northern region's environmentally clean image might suffer considerably as a direct consequence thus impacting on eco-recreation and eco-tourism marketing.

The impact of increasing levels of energy consumption related to economic development needs to be continuously assessed to ensure sensitive development that is ecologically sustainable. Principles such as *'user pays'* and *'polluter pays'* may need to be implemented or extended to better reflect the environmental costs of industry development, especially if the region's green image is to be a cornerstone of sport and recreation industry development strategy.

The fear of crime is increasing due to the more pervasive impact of the media and changing categories of crime, that is, liberalisation and de-regulation has impacted on a range of areas (e.g. liquor consumption, growth in gambling, the sex industry etc.). These changes impact largely on elderly people's perceptions. According to rates of 'reported crime', most violent crimes are decreasing, whilst other crimes, for example drug related crimes are increasing.

All of these changes, of which the above are only some examples, represent both resources and problems. They have fueled a massive diversification of, and increased interest in, recreation activities. Many of the traditional patterns of recreation have become irrelevant, and even newer patterns are rapidly being replaced by others.

Some economic trends with implications for Northern Tasmania include the growth of other economies, changing patterns of international trade, the development of global markets, corporatisation of government enterprises and the influence of new economic rationalism and the associated forms of managerialism. This latter change has brought about a number of changes with obvious implications for the sport and recreation industry. Many people are finding their work life is unpredictable. They face the constant threat of fluctuating incomes, unemployment, casualisation, re-structuring of work conditions and the like. They often have a lower level of discretionary income than previously and this may well decline even further. The insecurity people are feeling could be contributing to the willingness to take greater risks with incomes that are becoming more inadequate for those on the lowest incomes.

The structure of regional industry and nature of employment is changing; the number of blue collar workers and the range of production industries are generally declining, whilst white collar workers and service industries are generally increasing. Some service industries, such as the finance sector (banks, insurance, financial planning etc.) are going through dramatic restructure, down-sizing, redundancies and re-deployment to new areas of service (Take the Commonwealth Bank of Australia's buy-out / take-over of / merger with Colonial as a current example with only medium term employment commitments made to Tasmania). More skill and/or higher qualifications are being demanded. At the same time, there is extensive de-skilling of the labour force as more sectors of employment are impacted by automation and modular or completed goods and products designed and constructed in larger factories located in other areas. Thus work in many local areas is often becoming less satisfying and less genuinely productive.

At the public level, governments have not been able to fund the levels of service which the community had come to expect; private sector financial strategies are being adopted by the public sector and services are constantly shifting and changing in the struggle to adapt to change. This varies from one local authority to another but local government, in particular, is still undergoing change, partly as a result of amalgamation processes that occurred in the early 1990s in Tasmania but much more through the affect of competition policy and related legislation. Local Councils will now need to come to terms with the impact of the Commonwealth Government's GST on the cost structure of their goods and services.

All of this serves to create an environment of uncertainty and stress. The fact that Australia now has one of the highest suicide rates in the world represents one 'tip of the iceberg' of related social indicators. Australians have traditionally rated their recreation and, in particular, their social life, more highly than any other country but this is now under threat with the universal pressure for economic productivity. Obviously, one response to this would be to provide a better range of opportunities for relaxation and stress release. The paradox is that the 'sport and recreation industry' is also increasingly expected to be economically profitable, or at least self-sufficient.

The Economic and Social Benefits of the Sport and Recreation Industry

There are two broad sets of benefits that accrue to the market--community from the sport and recreation industry; they are the economic value--benefits and social value--benefits to participants and non participants outlined below. Firstly, the economic value--benefits that accrue to participants in sport and recreation are:

> Improved health or fitness and wage earning potential and the enhancement of workers' productive capacity whether they provide physical or non physical labour;
>
> Direct payments for supporting sports and recreation activities, such as paid coaches, recreation facility managers, indoor/outdoor recreation programmers, those people who receive payments for related activities such as journalists who provide accounts of sporting matches, tradespeople who repair facilities, medical staff who assist in treating injuries and organisations that run major events (which could include fishing and hunting contests) etc.;
>
> Direct and indirect financial gain by participants who are paid for the experience or skills they have previously gained from participation in sport or recreation, for example martial arts and yoga instructors, teachers who pass on their experience to students, centre operators who provide on-the-job staff training, etc.

Secondly, non participants in the sport and recreation industry benefit economically in terms of the:

> Financial gain by employers because workers who participate in sport or recreation become more productive and thereby reduce the costs of production;
>
> Potential for reduced prices to consumers due to increased worker productivity, depending on the characteristics or the industries in which workers are employed and the markets in which they operate;
>
> Impacts of participants' expenditures on businesses that receive the income from participants, for example facility operators, petrol stations, hotels and motels, retailers of sports and recreational equipment and clothing etc.

Thirdly, the social value--benefits that accrue from the sport and recreation industry include:

the shared experiences of participants and non participants ,
individual and group / team pride in achievement,
community pride in provision of opportunities and facilities,
social stability and bonding,
the sense of belonging,
the social catharsis of competing and participating,
the social continuity obtained through ongoing participation,
the encouragement given to young people,
the expansion of knowledge through involvement,
passing on the experience of previous volunteers and paid administrators, and
facilitating development of new visions and plans for sport and recreation *(See further details in Driver B.L. 1991).*

Key Planning Issues for the Sport and Recreation Industry

In sport and recreation industry development, the NTMO Recreation Committee faces a great challenge. It must steer a middle course between meeting the great diversity of community sport and recreation needs, many of which demand service provision and funding which should, and often can only, be provided from the public purse and, at the same time, exercising cost constraint, maximising income from, and facilitating private development in, the sport and recreation services provided. Continuing and unpredictable change means that capital investment must supply and provide for high quality provision, flexibility for future needs and adaptability to future demands.

The NTMO Recreation Committee needs to focus its sport and recreation industry development strategy on the consequences of these trends to people, their leisure time, behaviour, attitudes, problems and lifestyle. Continual change to sport and recreation services could mean greater efforts in leisure education, for example in retirement planning and the issue of social isolation that results from an elderly person losing a life partner and seeking different social / passive recreation opportunities to supplement or replace social interaction. Strategies taking account of related issues could be focused on patterns of behaviour related to leisure choices, including making positive recreation choices that contribute to social interaction, family life and personal health and happiness.

Sport and recreation industry development strategies could look to educating private enterprise about social responsibility, in the same way as was and is required of publicans to prevent excessive drinking, and by way of joint actions to correct the excesses that can occur in many new recreation opportunities (such as outdoor adventure services, over-use or harm minimisation of natural resources by local people and tourists). These and a range of other strategic responses need to be incorporated into the sport and recreation industry development strategy endorsed by the NTMO Recreation Committee.

The geographic location and nature of Northern Tasmania requires careful consideration of the equity and fairness of focusing sport and recreation industry development on a few or many activities or facilities in the region, that is all the sports or outdoor recreation, a national park or many local parks, a major edifice, for example an aquatic leisure centre, or many smaller local swimming pools against the probability that a significant proportion of the population will and do use recreation resources in and beyond the region because of the diversity and variation of private resources (i.e. vehicles, incomes etc.) and the range of other recreation interests, options and the assets available beyond the region..

The local population size, structure and composition is likely to change over the next ten years, necessitating consideration of sport and recreation industry development strategies to accommodate the changes. Population projections are clearly needed to assist in the creation of the final strategy.

The issue of 'ageing' in the region needs careful consideration and on what priorities sport and recreation industry service strategies should focus (e.g. Special design considerations in sports area planning, Retirement planning? Education for leisure services? Therapeutic recreation services? Social recreation services? (And/or) Cultural and entertainment services? etc.)

Economic fluctuations may require sport and recreation resources to be devoted to promoting alternate commercial recreation services to assist individual--family--community recovery from the negative impacts of change and generate opportunities for alternative sport and recreation developments in the medium to long term. What level of resources should therefore go to what types of commercial recreation (e.g. outdoor recreation providers, indoor sports centre operators, fitness / lifestyle or community health centres etc.) and under what conditions?

What form of consultation is needed with the community regarding sport and recreation industry development and new or upgraded facilities to consider the options and ensure 'rationalisation' does not mean ever higher quality private--commercial venues displace public sport and recreation options? In addition, what processes of negotiation and discussion are required to assist sports and recreation clubs and associations to consolidate, centralise and/or protect existing facilities and natural resources to ensure survival of a sport or recreation as rural populations and levels of participation or enthusiasm decline (e.g. shooting, football etc.) or fluctuate (e.g tennis, caving etc.)?

Consideration also needs to be given to the issue of negotiating with commercial recreation operators about social responsibilities and hotels with Electronic Gaming Machines (EGMs) about sponsoring sport and recreation developments or ongoing provision (e.g. supporting major events, assisting facility maintenance and development etc.).

Finally, the ongoing analysis of leisure trends and patterns requires a framework for thinking about the impacts of those trends and patterns of development. To assist in this analysis the diagram below is provided with some broad examples of the impacts and consequences of allowing market forces or *ad hoc* planning to predominate in the development of the sport and recreation industry. The diagram is a model that suggests there are two major stereotypical viewpoints that form (and reform) opposing arguments (i.e. policies or policy vacuums) on sport and recreation industry development. At the bottom of the diagram is the *ad hoc* (or unplanned) viewpoint on sport and recreation industry development whilst at the top of the diagram is the planned viewpoint on industry development. Quadrants 1 and 2 relate to developing industry development strategy to create 'constructive work' and 'innovative leisure' opportunities; broad examples of the positive consequences of strategic planning being (1) professionalisation of the industry to improve service quality and (2) enhancing the sustainability of communities by promoting the values and benefits that recreation services can have in a community. Quadrants 3 and 4 relate to the 'enforced leisure' and 'anti leisure' consequences of not planning industry development; broad examples of negative consequences being a tendency towards fundamental beliefs such as (3) unemployment (or a 'level of unemployment') is an acceptable consequence of the free [labour] market and (4) dependence on welfare (arising out of being unemployed etc.) is consistent with an aspect of why recreation services are provided. Clearly Quadrants 1 and 3 (on the left of the diagram) emphasise economic arguments whilst Quadrants 2 and 4 (on the right of the diagram) emphasise social arguments. The main proposition of the model is therefore that strategic planning, as an intervention in market forces, is more constructive and takes better advantage of opportunities in the industry. The alternative is to leave market forces to determine the negative consequences of not planning industry development. Applying the model to various issues that present themselves in arguments and debates about industry development are a series of issues or questions that might be asked during the process of debating industry planning, policy and decision making. For example:

> Are there opportunities to create work in the industry (or an industry sector)?
> Can education and training enhance the quality of related services provided?
> Are communities--markets aware of the benefits and values of recreation services?
> Can investments be made in recreation services that will reap future rewards? Etc.

Diagram 5: Critical Leisure Analysis Framework to Promote Strategic Thinking About the Sport & Recreation Industry Development
PLANNED SPORT & RECREATION INDUSTRY DEVELOPMENT THROUGH PARTNERSHIPS BETWEEN GOVERNMENT AND INDUSTRY LEADS TO:

ECONOMIC ASPECTS	(1) Constructive Work Opportunities, e.g. “Professionalising sport & recreation industry”	(2) Innovative Leisure Opportunities, e.g. “Sustaining Community values and benefits of recreation”	SOCIAL ASPECTS
	(3) Enforced Leisure Consequences, e.g. “Accepting Unemployment as necessary part of labour market”	(4) Anti Leisure Consequences, e.g. “Believing Welfare dependence is consistent with aspects of recreation provision”	

AD HOC (UNPLANNED) SPORT & RECREATION INDUSTRY DEVELOPMENT THAT ALLOWS MARKET FORCES TO DOMINATE LEADS TO:

On the basis of this model and the previously outlined contextual and theoretical framework, the method used in the study is described in the next section.

Section 3 - The Survey Instrument, Process, Profile & Regional Comparison

Survey Instrument: Questionnaire / Interview

The survey instrument was initially drafted in collaboration with staff from Sport and Recreation Victoria (SRV) and was supplemented with questions proposed by members of the NTMO Recreation Committee. The survey combined a mail out of self completion questionnaires with a set of interviews; the same questions were posed to all organisations contacted by mail or telephone. The survey was mailed with a covering letter of introduction to all sports and recreation organisations identified in the region and was complemented by reminder letters (with another survey form enclosed) and telephone reminders and interviews to organisations that had not responded after ten to fifteen days. The covering letter and introductions by phone explained the purpose and rationale for the survey and the letter and form included an incentive, in the form of a draw for one of three $50 book vouchers, to encourage return of the completed questionnaire.

Brent McKenna & Associates Consulting Pty. Ltd. arranged printing, collation, merging and mailing of the survey forms, covering letters, postage paid envelopes, reminder letters and additional questionnaires and phone calls to non respondents.

The five sections of the final survey instrument included:

6. Covering page with instructions that sought the respondent's name, phone & address;
7. Section 1, entitled *'About Your Organisation and You'*;
8. Section 2, entitled *'About Your Participants, Members and/or Customers'*;
9. Section 3, entitled *'Your Current Market Situation'*; (and)
10. Section 4, entitled *'Financial and Human Resources'*.

The interview / questionnaire form was designed for OMR (Optical Mark Recognition) to be scanned to create the regional data base that needed to be capable of conversion into electronic formats and enable the creation of defined statistical outputs such as frequencies and cross tabulations. On the basis of these outputs, industry indicators and measures of perceived growth and decline were to be compiled and used to report on industry development *(see Appendix for example of the survey form).*

Statistical Framework / Sample Design / Defining the "Industry"

The research process involved consideration of the statistical framework for the study. This framework was based on a combination of the ANZSIC (Australian and New Zealand Standard Industrial Classification) and the NSRISF (National Sport and Recreation Industry Statistical Framework) the latter of which used a broader definition of sport and recreation organisations and more comprehensively covered and included industries in or connected to the sport and recreation industry as a sector of the whole economy.

The NSRISF was developed by a working group of the Sport and Recreation Ministers' Council to help improve the definition, range and quality of statistics for sport and recreation. The framework consists of five major categories in the sport and recreation industry of which organised sport, active and passive recreation, and services to sport and recreation were included but amusement recreation and gambling were excluded from the study framework as these would necessitate inclusion of organisations like pin ball parlours, horse racing, hotels with gaming machines etc. These organisations were considered to be inappropriate to the study parameters and were also probably being monitored by other means. Each of the categories used were divided into sub-sectors like basketball, golf and tennis while recreation includes sub-sectors like boating and yachting, horse riding and bush walking.

Also included in the NSRISF are non core categories or other industries which have relevance to sport and recreation. Of these, only retailing of sport and recreation goods and equipment was included in the study. The other related industries like 'construction' (of sport and recreation facilities), 'wholesale trade', 'manufacturing', 'finance and insurance', 'agriculture, forestry and fishing', and 'cultural services' were excluded from the study.

This compromise statistical framework was the same as that used by SRV, thus allowing direct comparison with results from similar studies undertaken in Victoria. The next major issue was to define the sport and recreation industry to match the purposes of the study. The definition proposed by the consultant and agreed to by the NTMO Recreation Committee was:

Local and regionally oriented sport and recreation organisations in the NSRISF that are based on private--commercial, public--government, philanthropic or voluntary--community based means of support and which principally provide open spaces, places, venues, events and matches for most forms of organised and informal sport and recreation activities (excluding gambling and entertainment) and often also provide associated services and products, in addition to including retailers of products specifically used by people when attending or participating in sport and recreation activities in a range of natural environments or built facilities.

Organisations that were ruled into the survey had a local or regional market orientation. Organisations that were ruled out had a statewide market orientation. Most of this assessment was done on the basis of the organisation's name or title (e.g. Tasmanian Tennis Association ruled out because it had a state wide market). The key factor was therefore whether the organisation was considered to have a market focus within or beyond the region. Some organisations were contacted before it was found that their market focus was beyond the region whilst others were simply left off the mailing list because it was obvious from the title of the organisation that their focus was wider than the region.

Study Implementation

Administration of the survey took place in two main phases as Mail Out 1 and Mail Out 2. The first mail out was based on a mailing list supplied by the Executive Officer, Daniel Smedley, and the Office of Sport and Recreation (Tasmania) whilst the second was based on a mailing list compiled by the consultant, Brent McKenna, from Marketing Pro, a data base comprising of listings from the latest details *(i.e. April 2000 Edition)* available to/from the White and Yellow Pages Directories. This data base enabled the creation of contact details by industry and business classifications and post codes, in addition to being able de-duplicate multiple listings and exclude organisations already contacted through Mail Out 1. Approximately 10 days after each mail out a reminder letter and further questionnaire was sent to addresses that had not responded. At this same time reminder phone calls were made to non respondents and those respondents who were willing to be interviewed were interviewed by phone at that time or a time arranged that was more convenient to them. As part of this report, the details of survey numbers sent out and received back are supplied below.

Quality Assurance Report on Sampling

Table 4: Sample and Returns

Sample Numbers			Number Returned			
Mail Outs 1 & 2	Reminders & Extra Forms	Telephone Reminders / Interviews	Returned Incomplete no name / no contact	Incomplete & Refusals w Reasons* (1)	Returned Completed +Interviews (2)	Total Response (1 + 2)
404	310	142	17	15	187	202

Notes: Mail Out 1 was based on list supplied from Office of Sport and Recreation Tasmania and Mail Out 2 was based on Marketing Pro '*the White Pages--Yellow Pages data base'*. * Reasons given for not completing the survey form or interview included: not relevant to us, have already completed for another organisation, considered themselves not to be in the sport and recreation industry (e.g. some Martial Arts, Motor Cycle Club etc.), no longer in existence in Northern Tasmania (e.g. Bocce), can't help - please take off mailing list, club in recess, disbanded and disbursed funds to similar organisations (e.g. Shooting Association).

There were five late responses that could have been added to the number processed but were not added as the number required had been exceeded according to the sampling process used and the table below which was used as a guide based on scientifically validated research that enables determination of the needed size (S) of a randomly chosen sample from a given finite population of *N* cases such that the sample proportion (p) will be within plus or minus of .05 of the population proportion ‘p’ with a 95 percent level of confidence. This guide is similar to the sample design used by the ABS and consistent with the requirements of the study brief *(See Isaac S., 1987).*

Table 5: Guide to Sample Number Required

N	S	N	S	N	S
10	10	200	132	500	217
20	19	250	152	1000	278
50	44	300	169	10000	370
100	80	360	186	20000	377
150	108	420	201	100000	384

Consequently we can reasonably conclude that the response of more than 200 (plus late responses) compared to the estimated total population of organisations (from Mail Out lists 1 & 2) being just less than 400, after excluding certain organisations from the regional sport and recreation industry, would provide a representative indication of views and perceptions in the industry. Furthermore, the response demonstrated a good geographic spread had resulted, consistent with the LGA populations in the region as indicated in the table below.

Table 6: Regional/Local Spread of Respondent Organisations

	Number Who Responded	Percentage of Total	Total Pop. Census 96	% of Region Pop.
Break O Day	13	7%	5644	4.3%
Dorset	9	5%	7095	5.5%
Flinders	3	2%	924	0.7%
George Town	21	11%	6653	5.1%
Launceston	85	45%	62431	48.1%
Northern Midlands	13	7%	16773	12.9%
Meander Valley	19	10%	11371	8.8%
West Tamar	13	7%	18873	14.5%
Multiple LGAs	10	5%	N/A	N/A
TOTAL	187	~100%	129764	~100%

The assessment that there was good representative coverage of the region takes account of the fact that 10 organisations (or 5% of the total sample) reported that they served more than one municipality. The variations in proportions compared to the LGA population, requires some care in analysis of results for those LGAs with smaller populations, such as Flinders, as would be required according to any reasonably scientific sampling guidelines.

Using Classification Data to Profile the Regional Sport and Recreation Industry

More than three fifths (62%) of respondents categorised their organisations as voluntary, with more than a quarter (28%) being private and a little more than one tenth (12%) being public. Of the total responses, sixteen marked multiple categories; fifteen of these were voluntary and another category (i.e. 8 voluntary and philanthropic, 4 voluntary and public and 3 voluntary and private). These multiple responses were separated into the four options provided on the form, hence the numbers in the table add up to 108%.

Table 7: Respondents' Organisation Type

	Private	Public	Voluntary	Philanthropic	Blank
Total	52	22	116	10	2
%	28	12	62	5	1

Managers (34%) and club secretaries (32%) taken together formed two thirds of all respondents. The spread of remaining respondents suggests the 'voluntary' organisational structure led to a wider spread of respondents than the 'business' oriented structure where only a few responses came from other positions apart from Manager/Coordinator. Multiple responses, where committees completed the form, were few and account for the fact that the total adds up to 115%.

Table 8: Respondents' Position in Organisation

	Manager	Account.	Operator	Promoter	President	Secretary	Treas.	Com. M	Blank
Total	64	7	10	6	32	59	19	16	2
%	34	4	5	3	17	32	10	9	1

The answers to the question on respondents' age brackets could be used to create a classical bell shaped graph with the great majority of respondents (62%) being in the age brackets 35-44 and 45-54 (i.e. 25% and 37% respectively). The pattern of multiple responses concurs with the table above which concluded that some forms were completed by committees.

Table 9: Respondents' Age Brackets

	18-24	25-34	35-44	45-54	55-64	65-74	75+	Multiple	Blank
Total	0	20	47	69	32	14	3	1	1
%	0	11	25	37	17	7	2	1	1

Only the highest qualification obtained was recorded in the data base for this question so multiple responses were eliminated. Few respondents had higher degrees (5%) with almost half (47%)

having no post secondary qualifications at all. Almost half of the respondents (46%) had trade certificates, diplomas or degrees.

Table 10: Respondents' Post Secondary Qualifications					
	None	Trade Certificate	Diploma/Degree	Higher Degree	Blank
Total	87	38	49	9	4
%	47	20	26	5	2

The profile of responses suggests the great majority, that is more than three quarters of organisations (77%), were established more than 10 years with an additional 12% having been established for 5 to 10 years. A very high proportion of well established organisations is also a positive sign for sport and recreation industry development.

Table 11: Years of Operation of Respondents' Organisation					
	<2 yrs.	2-5 yrs	5-10 yrs.	>10 yrs.	Blank
Total	3	10	23	144	7
%	2	5	12	77	4

In conclusion, it is clear that the regional sport and recreation industry has a high level of voluntary involvement and many other similarities to the SW region of Victoria. The industry is also well established in terms of the high proportion of organisations which exceed 10 years of operation. The profile of respondents, who are guiding development within each organisation, suggests a good mix of age groups and qualifications to support industry development, at least within each organisation. Most importantly, the response rate and commentary received during administration of the survey suggests a high degree of interest and enthusiasm for the planning project. The survey results are presented and analysed in the next section to establish measures of industry development and to facilitate understanding of the strategies needed to develop the industry further.

Section 4 - Study Results and Analysis

Introduction to the Data Collected by the Study

Before presenting the data collected on the sport and recreation industry, as defined by this study, it is worth noting that measuring the emerging tertiary (or service) industry sector can present problems for a number of reasons.

Firstly, the primary and secondary industry sectors have been the largest and most well documented and analysed part of the economy in the past. These two sectors are now being overtaken by the newly rising and little documented tertiary industry sector. It should therefore be understood that the old standard industrial classification systems (ASIC and ANZSIC) do not dis-aggregate the tertiary sector to the same level of detail as the other two sectors of the economy. In effect, this means that many parts of the tertiary industry sector do not fall neatly into the old classification systems thus often making it difficult to obtain a comparative picture of the sector from sources, such as ABS publications.

Secondly, the intangible nature of services generally makes them relatively difficult to measure, especially in terms of the influence of major events and related regional earnings or net income/expenditure from sport and recreation services. The flow of tangible goods (from primary and secondary industries) through various forms of transport (land, sea and air) to other regions, states and countries is easier to track, measure and assess. Taken together with the cutbacks (or the non existence) of government collection of statistics the inaccuracy of measuring the sport and recreation industry (sub-)sector is compounded and usually means that various business surveys are used as the primary sources of data to measure the contribution of the sport and recreation industry to the economy *(for further details see 'Sport and Recreation: A Statistical Overview, Australia, December 1997').*

Thirdly, a part of the apparent growth in the tertiary industry sector may only reflect the method by which statistics are collected, rather than indicating an increase in the overall level of the service activity. Output and employment are generally recorded according to the dominant business of an organisation. With many primary and secondary sector organisations many people are employed to produce service-type activities, such as cleaning, catering, transport and distribution. Where service providing employees may be employed by a manufacturing company, their production was usually attributed to the secondary industry sector. However, during the 1980s and 1990s many services were contracted out, after which time the output became attributable to the service sector, making the service sector look larger, even though no additional services had been produced but merely switched from being internally to externally produced. To some extent this phenomena affects statistics on or related to recreation services. On the other hand, the professionalisation of sport has led to growing dependence on spectators; consequently some parts of particular sports have moved from the sport and recreation industry to the entertainment or amusement industries (e.g. AFL Football, National Basketball League etc.) for statistical collection purposes.

Having taken the care to introduce measurement of the tertiary industry sector and its sub sector, the sport and recreation industry, as a complex and difficult area of productive activity to measure, it is important to note that the tertiary industry sector is indeed growing and has been growing more rapidly than other parts of the economy for the past two or more decades. As a vehicle for economic growth, the sport and recreation industry can contribute in four main ways to Northern Tasmania's regional economic development; these ways are:

1. By offering services which result in a net inflow of wealth (e.g. through major events management, outdoor recreation and adventure programming, retirement planning and lifestyle services for retirees to attract capital investment and generate multiplier effects in related leisure and therapeutic recreation services etc.);
2. By reducing the need to buy-in services from other regions and overseas that consume regionally produced wealth (e.g. further investment in relevant tertiary education and training, Councils to assess risks and increase self insurance of sport and recreation related to public use liabilities, storm damage to facilities etc.);
3. By combining with other primary and secondary activities to incubate new production possibilities for manufactured goods, thereby increasing exports and reducing imports (e.g. quality back-packs, hi-tech yacht shells, top shelf golf accessories, specialised fishing and shooting accessories etc.); and
4. By service innovation in the regional sport and recreation industry that develops, promotes and extends the social capital in, and environmental values of, the region through leadership, systematic planning, research, initiative, expanding club membership, increasing participation, skill development and community development of the networks and the sport and recreation organisations that exist in the region.

Much of the thinking behind the examples mentioned above is underpinned by notions that the special nature, role and function of the regional sport and recreation market--community in industry development is to provide the environment for product testing. This concept has a certain tension with the concept that sport and recreation is a valued service or part of the life of a community and is valued as much, if not more, for that social role rather than its financial and economic impacts. Taking the first concept as a guide in this study, regional consumers--users can provide the necessary feedback, comments and suggestions on new goods produced and service developments implemented (collectively termed 'new products') thereby becoming subjects in the Research and Development (R&D) process or 'laboratory'. This regional laboratory would, of course, take advantage of the unique set of local characteristics, in terms of the physical, social, economic and technical capabilities and environmental traits that exist to enable and facilitate effective 'product testing' *vis a vis* particular sports and recreations and notable special interests of certain sectors of market (e.g. bush walking, caving, fishing etc.)

Data collected through the survey is presented in frequency tables below with outlines of the key aspects of the regional sport and recreation market. The figures provide an understanding of the sport and recreation industry as a tertiary sector of the economy. The characteristics of this sector of the economy need to be understood to ensure assistance and encouragement to develop strategies that might grow, evolve and/or focus on sub-sectors of the sport and recreation industry and their related markets. The assistance and encouragement provided could improve performance in some sectors and continue appropriate development in others and the results could be tracked through future surveys and through socio-economic indicators obtained from longitudinal analysis of Census data. This latter data, in actuality, suggests the tertiary sector has performed well over the 10 years from 1986 to 1996. The data tables presented below are consistent with the outputs required in the brief whilst Census data is provided and analysed in the next section to add value to the whole report.

The Organisations As Sport and Recreation "Businesses"

The range of sports and recreations provided or facilitated by organisations, according to respondents' feedback, are represented in the table below. In summary the sports most commonly provided in the region are: tennis (20%), Australian rules football (12%), basketball (12%), netball (12%), soccer (11%) and outdoor cricket (10%). Individual and team sports were also nominated by high proportions of respondents (i.e. 19% and 22% respectively) but it is noted that a range of different sports were included amongst these individual and team sports (e.g. wood chopping, shooting - pistol, clay, target, small bore, surfing etc.). The recreations most commonly provided in the region are: aerobics/gym/fitness activities (17%), non competitive swimming (12%), martial arts (11%) and bush walking (8%) with an array of other active recreations nominated by significant proportions of respondents.

Table 12: Sports and Recreations Provided / Facilitated					
Sport	Total	%	Recreation	Total	%
Athletics	12	6	Aerobics/Gym/Fitness	31	17
Australian Rules F/ball	23	12	Billiards	14	7
Basketball	23	12	Bush Walking	15	8
Baseball	1	1	Camping	12	6
Bowling	16	9	Canoeing/Boat/Yacht	9	5
O/D Cricket	19	10	Equestrian	7	4

I/D Cricket	9	5	Cycling	7	4
Cycling	7	4	Fishing	7	4
Golf	11	6	Martial Arts	21	11
Gym/Calisthenics.	5	3	Motor Racing	2	1
Hockey	12	6	Rogaining	1	1
Netball	22	12	Roller Blade/Ice Skate	12	6
Rugby	1	1	Snow Skiing	7	4
Soccer	20	11	Swimming	22	12
Squash	11	6	Trampolining	5	3
Swimming	12	6	Walking/Jogging	12	6
Tennis	37	20	Water Safety/U-Diving	10	5
10 Pin Bowling	8	4	Active Rec.	14	7
Team Sport	36	19	Passive Rec.	10	5
Individual Sport	42	22	Blank	87	47
Blank	41	22			

The highest proportion of services provided in, or facilitated by, the sport and recreation industry was "education and training" (33%) with significant proportions nominating four of the remaining six categories of services. It was clear from cross tabulation of the results and additional qualitative information provided by respondents that these education and training services were not the 'core services' but rather 'non core services' such as coaching, teaching, guidance and assistance provided or facilitated as 'add-on services' to members, participants and users of the core services provided by the organisation.

Table 13: Services to Sport/Recreation Provided or Facilitated		
	Total	%
Government Run Sport / Recreation	12	6
Sport / Recreation for Disabled only	9	5
Sports Medicine / Exercise Science	1	1
Sport & Recreation Education and Training	62	33
Adventure / Wilderness Recreation	14	7
Other Sport / Recreation Clubs	22	12
Blank	91	49

Sports clothing and footwear were the most common goods and equipment sold by organisations (8%) with four other types of goods and equipment being nominated by the same proportion of respondents, that is 4% nominated each of goods and equipment for (a) fishing and shooting, (b) golf, (c) team sports and (d) individual sports. Having drawn attention to these areas of activity, it is noted that organisations that provide retail services do not constitute the major proportion of the industry with 82% of organisations leaving this question blank, although they may well constitute a very significant part of the total turnover.

Table 14: Main Sales Items Retailed		
	Total	%
Boat / U-Water / Surfing	3	2
Bush Walking	1	1
Camping & Caravanning	1	1
Cycling	5	3
Fishing / Shooting	7	4
Gardening	0	0
Golf	7	4
Skiing (Water & Snow)	1	1
Team Sports	7	4
Ind Sports	8	4
Other Sport / Recreation	5	3
Sports Clothing & Footwear	15	8
Blank	153	82

Participant, Member / Customer Profile: Numbers and Catchment Areas

People accessing the services or goods of the respondents' organisation were defined as:

Participants (i.e. those who participate in the organisation's activities or services);
Members (i.e. those who have a vote on the affairs of the organisation); and/or
Customers (i.e. those who pay a fee or a price for goods or services received).

Of these three categories of people accessing services or goods of the respondents' organisations, around one third (33%) of all respondents indicated they had 91% - 100% 'participants', whilst only 28% and 27% indicated they had 91% - 100% 'members' and 'customers' respectively. Of the answers about a customer base, 56% of respondents marked none or left the question blank thus indicating more than half of the organisations had no customers.

Table 15: People Accessing Services or Goods							
	None/Blank	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%
Participants							
Total	56	12	15	7	8	28	61
%	30	6	8	4	4	15	33
Members							
Total	61	27	12	10	13	12	52
%	33	14	6	5	7	6	28
Customers							
Total	105	7	7	3	7	7	51
%	56	4	4	2	4	4	27

In relation to serving special needs groups, one quarter (25%) of all respondent organisations indicated that they were made up of mostly young people, with more than three quarters of all respondents indicating they were made up of partly young and partly older people.

Table 16: Special Needs Make-up of Participants, Members &/or Customers

	Mostly Disabled	Mostly Older	Mostly Young	Mostly Indigns.	Partly w disabilities	Partly Older	Partly Young	Partly Indigns.	Blank
Total	1	13	46	0	32	80	68	19	44
%	1	7	25	0	17	43	36	10	24

Three quarters (75%) of all respondents estimated that their organisations had members; one quarter (25%) had less than 50 members whilst no respondents' organisations had more than 400 members. The respondent organisations therefore did not include at least two sport and recreation organisations based within the region that are known to have more than 400 members (i.e. Northern Bombers and South Launceston Bulldogs football clubs).

Table 17: Approximate Total Membership Number

	None	<50	50-100	100-200	200-400	Blank
Total	9	47	32	27	36	37
%	5	25	17	14	19	20

Just over half of all respondents estimated that their organisations provide for less than 100 people each week. Taking the figures from this table an estimate of the total number of people accessing or attending sport and recreation services or purchasing products each week is calculated to be 53,580 in Northern Tasmania. It is noted that this figure over-estimates the number of participants because clubs and local government authorities would have, in some cases, provided estimates of participant numbers (especially in sport) using public facilities and both figures are included in the calculation. Adjustments were not made to the final calculation because of the complexity of dis-aggregating the two sets of figures obtained from the survey.

Table 18: Weekly Participant, Member &/or Customer Numbers (& Total)

	<20	20-100	101-200	201-1000	>1000	Blank
Total (T)	36	68	15	32	11	25
%	19	36	8	17	6	13
Est. Weekly Nos. (W)	10	60	150	250	1100	Total
Total = (T X W) X 2	720	8160	4500	16000	24200	53580

Respondents indicated that there are more sport and recreation organisations with a majority of males than there are organisations with a majority of females but around two fifths (41%) of all organisations are made up of an equal balance of males and females.

Table 19: Gender Group Make-up of Participants, Members &/or Customers					
	Mostly Male	Mostly Female	50:50 Male/Female	Don't Know	Blank
Total	68	36	77	4	2
%	36	19	41	2	1

Only 15% of all respondents estimated their organisations consist of more than 90% from one gender group.

Table 20: Proportion of Major Gender Group							
	51-60%	61-70%	71-80%	81-90%	>90%	Don't Know	Blank
Total	16	22	22	19	28	2	78
%	9	12	12	10	15	1	42

Just over half (52%) of all respondents estimated that their organisations' services, activities or major products were used mainly on a seasonal basis leaving less than half (46%) as non seasonal.

Table 21: Mainly Seasonal Use of Core Services, Activities or Major Products				
	Yes	No	Don't Know	Blank
Total	98	86	1	2
%	52	46	1	1

Almost three quarters of all respondents estimated that their organisations had most participants, members and/or customers using facilities, services, activities or outlets at least once a week.

Table 22: Regularity of Use of Facilities / Services etc.							
	>2X/week	2X/week	1/week	1/Fortnight	1/Month	<1/Month	Blank
Total	36	40	62	9	18	13	9
%	19	21	33	5	10	7	5

Around half (50%) of all respondents estimated that more than 15% of participants, members and/or customers came from outside the township or suburb.

Table 23: Proportion Who Come From Outside the Township/Suburb					
	1-5%	6-10%	11-15%	>15%	Blank
Total	38	27	26	93	3
%	20	14	14	50	2

The very great majority of respondents (83%) estimated that most participants, members and/or customers come from within the municipality (inclusive of the township or suburb).

Table 24: Most Participants, Members and/or Customers Come From					
	Within Town/Suburb	Within LGA	Beyond LGA	Not Applicable	Blank
Total	50	104	31	0	2
%	27	56	17	0	1

More than one quarter of respondents (27%) estimated that participant / customer numbers had declined over the past five years with a further 28% estimated they had been stable and over a third (34%) estimated a rise in numbers.

Table 25: Five Year Trend in Participants/Customers							
	Up 7%	Up 2-7%	Stable	Down 2-7%	Down 7%	Not App	Blank
Total	37	27	52	25	27	7	12
%	20	14	28	13	14	4	6

Respondents were less up beat about membership numbers and estimated a more even balance between rises and declines with 29% who estimated stable numbers.

Table 26: Five Year Trend Membership Numbers							
	Up 7%	Up 2-7%	Stable	Down 2-7%	Down 7%	Not App	Blank
Total	22	22	54	22	19	20	28
%	12	12	29	12	10	11	15

Almost three tenths (29%) of all respondents estimated the predominant age grouping of participants, members and / or customers was 15 to 34 years of age, leaving a third (34%) who indicated none of the age groupings offered as options were predominant (i.e. they marked not applicable, multiple options or left the question blank).

Table 27: Predominant Age Groupings							
	<15	15-34	35-54	>55	Not Applicable	Multiple	Blank
Total	23	54	31	16	24	29	10
%	12	29	17	9	13	16	5

Current Market Situation

Approximately equal proportions (i.e. 43% and 41% respectively) of respondents held the opinion that there was and was not competition from new sports, recreations or pastimes for their participants, members or customers. By reference to the open ended comments supplied to this question it was clear that competition was largely believed to be home based and physically passive in the form of technology and included television, computers, video games, multi media etc. but also related to labour market trends and the effects of structural change in the economy and the more demanding and stressful realities of making a living and adjusting to flexible working hours etc.

Table 28: Competition by New Sports, Recreations or Pastimes for Participants, Members or Customers

	Yes	No	Don't Know	Blank
Total	80	76	27	4
%	43	41	14	2

Around one half (51%) of all respondents believed their organisations were spending about the same on promotion leaving only a quarter (26%) who felt there was more promotional spending and a seventh (15%) who felt there was less spent on promotion.

Table 29: Opinion on Spending More or Less on Promotion (over last 5 years)

	Much More	Little More	Same	Little Less	Much Less	Don't Know	Blank
Total	14	35	95	18	9	6	10
%	7	19	51	10	5	3	5

The great majority (84%) of respondents felt that facilities were the same (32%) or improved (52%) in quality over the past 5 years. By comparison with services (table below) the ratings were quite up beat with 21% indicating facilities had 'much improved'.

Table 30: Opinion Rating on Change in the Quality of Facilities Over Last 5 Years

	Much Improved	Improved	Same	Declined a Little	Declined a Lot	Don't Know	Blank
Total	39	58	59	17	7	3	4
%	21	31	32	9	4	2	2

Ratings on the quality of services were more ambivalent than with facilities with 41% indicating they were about the same but more than half (52%) of all respondents believed they had improved.

Table 31: Opinion Rating on Change in the Quality of Services (over last 5 years)

	Much Improved	Improved	Same	Declined a Little	Declined a Lot	Don't Know	Blank
Total	29	67	77	7	1	3	3
%	16	36	41	4	1	2	2

Respondents were fairly evenly split between yes and no (i.e. 43% and 48% respectively) in expressing the opinion that the range of services provided by their organisations had changed.

Table 32: Opinion on Change in the Range of Services Over the Last 5 Years				
	Yes	No	Don't Know	Blank
Total	81	90	12	4
%	43	48	6	2

More than half (55%) of all respondents felt price competitiveness was a significant factor in maintaining or increasing their total number of participants, members or customers.

Table 33: Significance of Price Competitiveness in Maintaining / Increasing Total Numbers				
	Yes	No	Don't Know	Blank
Total	103	67	15	2
%	55	36	8	1

More than two thirds (68%) of all respondents held the opinion that new opportunities need to be analysed.

Table 34: Need to Analyse New Opportunities					
	Yes	No	Don't Know	Blank	Multiple
Total	127	37	21	1	1
%	68	20	11	1	1

More than six tenths (62%) of all respondents held the opinion that their organisation needed to develop new approaches to take advantage of new opportunities.

Table 35: Need to Develop New Approaches to Take Advantage of New Opportunities				
	Yes	No	Don't Know	Blank
Total	116	49	20	2
%	62	26	11	1

Over a third (37%) felt there was a need to analyse threats to their market share leaving 48% who did not think this was needed.

Table 36: Need to Analyse Threats to Market Share				
	Yes	No	Don't Know	Blank
Total	70	90	13	14
%	37	48	7	7

The majority of respondents (58%) held the opinion that the age structure was not changing although more than a third (36%) felt it was changing.

Table 37: Opinion on Changing Age Structure					
	Yes	No	Don't Know	Blank	Multiple
Total	68	108	6	4	1
%	36	58	3	2	1

Of those who felt the age structure was changing almost twice the proportion (24% cf. 13%) felt the trend was towards a 'maturing' age structure compared to 'getting younger'.

Table 38: Direction of Age Structure Trend					
	Maturing	Getting Younger	Don't Know	Blank	Multiple
Total	45	24	2	113	3
%	24	13	1	60	2

The huge majority (96%) of respondents clearly indicated that Australia was the predominant birthplace of participants, members and/ or customers.

Table 39: Main Birth Place					
	Australia	OS English Speaking	OS Non English Speaking	Don't Know	Blank
Total	179	0	1	4	3
%	96	0	1	2	2

A tiny proportion (4%) of respondents held the opinion that birthplaces were changing with only 3% holding the opinion that people were coming from overseas and, of these, only 2% felt they would come from non English speaking countries. (Tables not included).

More than three quarters (77%) of respondents indicated they owned / purchased, leased or were renting facilities. Of these, almost half (36%) owned or were purchasing facilities.

Table 40: Facility Access Arrangements							
	Owning / Purchasing	Leasing	Renting	Buying Occasional Access	Free Access / Informal Arrangemnts.	Don't Know	Blank
Total	68	38	39	7	33	18	3
%	36	20	21	4	18	10	2

The great majority (88%) of respondents indicated their organisations were primarily dependant on buildings (46%) and land (42%) such as Council parks and ovals, with a further 14% being dependant on natural areas, such as waterways and State parks.

Table 41: Resource on Which Organisations Are Primarily Dependant

	Buildings	Natural Areas	Land	Air	Electronic	Don't Know	Blank
Total	86	26	79	3	5	12	21
%	46	14	42	2	3	6	11

Almost half (45%) of all respondents chose 'developed' or 'under-developed' to describe their facilities which indicates room for improvement.

Table 42: Descriptions of "Development" of Facilities Used

	Very Developed	Developed	Under Developed	Undeveloped Waterways	Undeveloped Natural Land	Don't Know	Blank
Total	51	67	16	9	18	7	31
%	27	36	9	5	10	4	17

Levels of Confidence and Future Requirements Related to Facility Development Plans.

It is reasonable to conclude that the level of confidence about facility development plans is restrained in that slightly more than half (52%) indicated they expected or hoped that new or further development of facilities would occur in the future. Of those who expected or hoped for further development of their facilities, a higher proportion (41%) felt the development would cost less than $20,000 but almost a third (32%) thought it would cost more.

Table 43: Expectations / Hopes to Undertake New or Further Development

	Yes	No	Possibly	Blank
Total	97	56	30	4
%	52	30	16	2

Table 44: Extent of Proposed Development

	>$500K	$20-$499K	<$20K	Blank
Total	13	46	77	51
%	7	25	41	27

The question on financing development allowed respondents to mark more than one source, consequently the total percentage of responses is 110% with government grants (local, state and federal) topping the anticipated sources at 49% of all respondents. Almost one third (30%) felt savings was likely to be a source.

Table 45: Sources of Finance

	Savings	New Revenue	Loans	Government Grants	Blank
Total	56	16	41	91	63
%	30	9	22	49	34

More respondents felt government subsidisation should increase compared to staying the same (i.e. 39% cf. 32%).

Table 46: Expected Levels of Government Subsidisation Required in Next 5 Years				
	Increase	Same	Decrease	Blank
Total	72	59	26	30
%	39	32	14	16

Almost two thirds (65%) of all respondents indicated their organisation does not provide financially oriented incentives to attract or secure participants, members or customers.

Table 47: Incentives Provided to Attract or Secure Participants, Members and/or Customers				
	Yes	No	Don't Know	Blank
Total	57	121	2	7
%	30	65	1	4

Estimated Business Activity in the Regional Sport and Recreation Industry

To begin with, more respondents felt total organisation income was up compared to those who felt it was down (i.e. 35% cf. 20%) leaving 36% who felt it was stable.

Table 48: Opinion on 5 Year Trend in Total Organisation Income							
	Up >10%	Up 5-10%	Stable	Down 5-10%	Down >10%	Don't Know	Blank
Total	34	32	67	17	21	8	8
%	18	17	36	9	11	4	4

Almost three quarters of all respondents indicated their organisations had a total annual income of less than $100,00 and, of these, around two thirds indicated they had annual incomes of less than $25,000.

The few organisations with high total annual incomes suggests growth potential, partly by way of encouraging smaller retail organisations (e.g. through piggy back strategies such as used by Quicksilver and Billabong in Torquay, Victoria who piggy backed on to Rip Curl into the global surfing accessories market) but this encouragement would depend on the nature of the larger organisations. Alternatively smaller organisations may be able to pursue significant sponsorship opportunities through these organisations.

The high proportion of respondents who indicated their organisations had relatively small total annual incomes also suggests potential for developing relevant training and development programs for organisation administrators (paid and voluntary). The estimated gross annual income for all sport and recreation organisations (as if "businesses") operating in the regional sport and recreation industry is calculated at more than $55 million per annum according to the details in the table below where the sample is taken to be one half of the whole industry.

Table 49: Total Annual Income Brackets from All Sources						
	>$1m	$500K-1m	$100-500K	$25-100K	<25K	Blank
Total (T)	9	6	25	42	97	8
%	5	3	13	22	52	4
Est. Avge. Annual Income (I)	1250000	750000	300000	62500	20000	Total
Total = (T X I) X 2	22500000	9000000	15000000	5250000	3880000	55630000

According to the blank responses added to the proportion who chose 'none', membership fees, followed by participation fees and fund raising, were the most likely sources of income for most organisations. Very few organisations gained income from gaming machines or spectators and most of those that did gained only a very minor proportion of their total income from these sources. Sponsorship, fund raising, catering and drinks were obvious sources of income that could be encouraged through appropriate education and training strategies targeted to organisation administrators.

Table 50: Sources of Income by Estimated Proportions								
Membership Fees								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	34	39	20	12	10	12	26	34
%	18	21	11	6	5	6	14	18
Participation Fees								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	28	31	16	12	10	11	27	52
%	15	17	9	6	5	6	14	28
Spectator's Fees								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	72	10	5	3	0	1	2	94
%	39	5	3	2	0	1	1	50
Sponsorship								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	54	45	7	2	1	0	2	76
%	29	24	4	1	1	0	1	41
Fund Raising								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	39	45	20	10	4	4	4	61
%	21	24	11	5	2	2	2	33
Government. Funding								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank

Total	70	20	7	2	2	2	3	81
%	37	11	4	1	1	1	2	43
Retail Sales								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	63	12	10	4	3	0	14	81
%	34	6	5	2	2	0	7	43
Catering/Drinks								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	51	26	18	11	4	1	2	74
%	27	14	10	6	2	1	1	40
Gaming Machines								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	85	3	0	0	0	0	0	99
%	45	2	0	0	0	0	0	53
Other								
	None	1-10%	11-30%	31-50%	51-70%	71-90%	91-100%	Blank
Total	54	15	4	2	2	2	5	103
%	29	8	2	1	1	1	3	55

Forty five percent of all respondents employed the equivalent of one or more full time staff with the great majority of these employing less than four equivalent full time staff. The estimated number of organisations that have paid employees is calculated by multiplying the number of organisations that have EFT employees by two, (i.e. 84 X 2 = 168 in the region). The estimated number of paid employees in the region is therefore 1,050 based on the figures provided in the table below.

Table 51: Approx. Number of Equivalent Full Time Employees per Organisation and in the Region					
	>40 EFTs	11-40 EFTs	4-10 EFTs	<4 EFTs	Blank
Total (T)	4	5	14	61	103
%	2	3	7	33	55
Est Avg. No. of Employees (E)	45	25	7	2	Total
Total = (T X E) X 2	360	250	196	244	1050

Estimated Number of Volunteers & Their Contribution in Hours & Dollars

Three quarters (75%) of all respondents indicated that their organisations used volunteers with almost a quarter (22%) using more than 20 volunteers. Around half (50%) the respondents indicated the average volunteer works for around one to five hours each week. Using the figures in the tables below, the estimated total number of volunteers in sport and recreation organisations is 3,680 people. Based on this figure and the estimated number of hours the average volunteer works each week, their total contribution in hours each week is around 1,874 which suggests a nominal dollar value (at $12 per hour) of almost $22,488 per week or almost $1,170,000 per year.

Table 52: Approximate Number of Volunteers per Organisation and Estimated Total in Region				
	>20 Volunteers	10-20 Volunteers	<10 Volunteers	Blank
Survey Total (T)	41	32	67	47
%	22	17	36	25
Est. Vol. Nos. Per Org. (V)	25	15	5	Total
Total = (TXV) X 2	2050	960	670	3680

Table 53: Number of Hours the Average Volunteer Works Each Week (& Est. Regional Total)									
	1-5	1-10	11-15	16-20	21-25	26-30	31-35	36-40	Blank
Total (T)	94	26	10	8	1	8	0	0	40
%	50	14	5	4	1	4	0	0	21
Est Hrs Avg. Volunteer Works (H)	2.5	7.5	12.5	17.5	22.2	27.5	32.5	37.6	Total
Total = (T X H) X 2	470	390	250	280	44.4	440	0	0	1874

Respondent Perceptions Highlighting Similarities and Differences To A Similar Region

The comparison between the regions of Northern Tasmania and South West Victoria focusses on respondents' perceptions about the people (participants, members / customers) who use or purchase sports and recreation services, activities and products provided by their organisations.

The analysis suggests similar proportions of participants (70% and 67%) and non participants (i.e. 30% to 33%) with additional similarities in the proportional make-up (e.g. both regions had a third of respondents indicating that 91% - 100% of people accessing their services were participants). In contrast to this, SW Victoria had almost three quarters of respondents (compared to two thirds in Northern Tasmania) who indicated they had members. In other words SW Victoria seems to have a stronger membership base which was re-confirmed by 39% (compared to 28% of respondents in Northern Tasmania) who indicated they had 91%-100% members. Respondents from both regions had a similar customer base with slightly under half indicating they had customers.

In comparing respondents' perceptions of people numbers in Northern Tasmania and SW Victoria, a greater proportion of respondents (87% compared to 80% respectively) indicated weekly access of services and activities or weekly access to purchase products. Respondents' perceptions of gender group make-up indicates little difference between the regions with the greatest difference being 41% of respondents indicating their organisations were half male half female compared to only 38% in SW Victoria. This difference seems to be largely a result of slightly fewer male dominated organisations, that is 36% compared to 40%. This pattern of similarity was also reflected in the proportion of respondents who reported on the male / female dominance of mixed gender organisations.

Respondents reported similar seasonal use patterns, regular use patterns by the majority of people and similar proportions who came from within the defined catchment areas, that is township/suburb, within and beyond the LGA (e.g. 56% of respondents from each region reported people came from within the LGA whilst a slightly lower proportion in Northern Tasmania (27% compared to 31%) reported people came from within the township or suburb. This latter figure seems to be consistent with the smaller size of towns in much of the Northern Tasmanian region compared to towns in SW Victoria.

A slightly higher proportion of respondents from Northern Tasmania than SW Victoria indicated declines in participants and customers (i.e. 27% compared to 21%) and a slightly lower proportion indicated rises (i.e. 35% compared to 37%). This was emphasised by the figures on respondents who reported little change in participant / customer numbers with 28% of respondents from Northern Tasmania compared to 36% from SW Victoria who felt numbers were stable. This same pattern of responses was reflect in respondents' perceptions of participants numbers.

Respondents reported a similar profile of predominant age groupings in each region which suggests a similar profile of participation and involvement in sport and recreation organisations which is highly consistent with ABS data on participation in sport and recreation by age groupings (see section above).

Respondents reported similar patterns of response to the question about competition from new sports, recreation or pastimes but dissimilar patterns emerged on opinions about spending on promotion. In Northern Tasmania respondents felt there were proportionately more organisations spending less on promotion (15% compared to 7% in SW Victoria) and less organisations were spending more on promotion (26% compared to 35% in SW Victoria).

Based on the perceptions about membership numbers and responses to questions about issues around decline, stability and growth etc. it seems clear that the sport and recreation industry in Northern Tasmania needs a 'focussed strategy' to encourage increased membership of sport and recreation organisations, in addition to 'innovation strategies' to re-invigorate the existing membership based organisations.

What The Data Indicate About Levels of Confidence in Regional Sport & Recreation Industry

The data from the survey indicate that respondents' perceptions about the quality of facilities and services, change in the range of services, the significance of price competitiveness, the need to analyse new opportunities and to develop new approaches to take advantage of new opportunities were generally more positive in Northern Tasmania than SW Victoria. In reaching the conclusion that respondents from Northern Tasmania were more upbeat, enthusiastic and confident about change and improvements compared to respondents from SW Victoria some readers might find this surprising but this finding could relate to a range of factors, such as the political climate in Victoria at the time of that study and social climate in Northern Tasmania at the time of this study, in terms of the 'Hawthorn Effect' (as described by psychologists) *vis a vis* the promotion and higher profile of the study in Northern Tasmanian compared to the limited profile of the study in SW Victoria.

Also Northern Tasmania had the direct involvement of each Council through the NTMO. In contrast the similar study undertaken in SW Victoria had little or no direct Council involvement (especially in terms of steering the project) and was not a part of a more comprehensive regional planning project (such as that entailed by the Future Game Plans project) and had little or no promotion directed towards respondents beyond that used in administering the survey; as this occurred in both regions it was a controlled variable and cancels out this form of promotion as a factor.

An estimate of expenditure per participant on organised sport and recreation activities in this region (Northern Tasmania) is gained by using the figures calculated above on the total annual income of all organisations in the sport and recreation industry (estimated as $55,630,000 per annum) and the total number of participants, members and/or customers accessing services or activities or purchasing products each week (estimated as 53,580 people). The dollar figure of $55,630,00 is divided by 52 weeks (= $1,069,807 per week) and this figure is divided by 53,580 people to provide the answer of $19.96 or around $20 spent by each participant, member and/or customer each week. Rounding this final figure is appropriate to convey the understanding that it is an estimate based on a reasonable set of assumptions used in and established by this study, consistent with standard techniques used in economic modelling.

Section 5 - Developing A Sport and Recreation Industry Development Strategy

Orthodox economic studies and analyses tend towards defining *'development'* to mean growth, improvement, betterment, advancement and progress etc. These studies are predicated on the notion that post industrial societies where tertiary industries have become the dominant sector of the economy still define and require industry development as being focussed on contributing to rising *'standards of living'* in terms of expanding *'material well-being'*. This expansion of material well-being is, in turn, generally measured by the increased production in and distribution of goods and services. Consequently what tends to be understood as industry development is usually taken to equate to material development and this is usually measured in monetary terms. Thus industry development is equated with economic growth, or measures of growth in per capita income (or, on a national scale, Gross Domestic Product - GDP) which is one of the indicators created from the five yearly ABS Census (or, in the case of GDP, is generated through the system of national accounts). Technological innovations have also been a major contributor to growth and, more broadly, to industrial development.

The social economics approach, in contrast to the orthodox economics approach, draws on notions of *'sustainable industry development'* and focuses attention towards the achievement of social well-being. Although sustainability refers to the ability to continue an activity or maintain a certain condition indefinitely, it does not preclude industry development nor does it necessitate increased material well-being as fundamental to success. Commonly, sustainability is used to consider the environmental impacts of human activities, including resource depletion and pollution, but it can be equally applied to economic and social systems, as well as ecological. The 'well-being' that flows from sustainable industry development refers to the condition or state of being well, contented and satisfied with life and includes social, physical, mental and spiritual components. It is arguably the case that these notions - sustainability and well-being - are sound foundations for a regional sport and recreation industry vision that lays the foundation for achieving a desirable future where there is higher, more equitable and sustainable 'quality of life' *(See Eckersley R. 1997).*

Developing a sport and recreation industry development strategy to reach these destinations could be achieved by integrating, into an industry development framework, the information and knowledge gained from this study. The study has begun to compile data about the region's sport and recreation activities (which are indicators of regional leisure preferences), employment and volunteer levels (which are indicators of service patterns in the industry), and the sport and recreation resource dependancies (which are indicators of potential impacts) of the regional community *vis a vis* sport and recreation. Such a framework also necessitates, as conditions for achievement, local--regional leadership, inter-disciplinary planning, broad cooperation by management, joint industry--

government facilitation, genuine encouragement and targeted financial and technical assistance to effectively promote sustainable sport and recreation industry development as a sound project and processes complementary to the broad goal of achieving social well-being.

Applying Measures of Industry Development

In applying measures of industry development collected through this study certain issues need to be clear. Firstly, taking the data collected by the industry study and using it as if it is 'value free' and unhindered by political, economic, social and environmental agendas is inappropriate, especially when the data collected are based on respondents' views and perceptions. Secondly, the indicators created by the study are designed to make simple comparisons with other regions where similar studies have been done and to suggest something about the interacting forces that exist in these regions. Thirdly, the study seeks to triangulate some of the data with other sources of data and information (such as the ABS Census and locally produced reports such as the Break O Day Recreation Study). The study emphasises the need for data interconnections to paint a picture of the Northern Region's sport and recreation industry and thereby provides guidance about the industry for planning and strategy development purposes. This study therefore only begins the compilation of social and economic data and the development of indicators of sport and recreation industry development. As a starting point the findings, calculations and estimates need to be considered in this light and any lessons learnt should be used in future and ongoing monitoring and evaluation of industry development.

The regional sport and recreation industry development strategy that, in part, grows out of this study should ultimately consider most, if not all, of the following program elements:

1. Sport and recreation business / organisation development programs for different communities of recreational interest and related markets, in addition to start-ups and business incubation centres etc.
2. Existing sport and recreation services - public, private and voluntary.
3. Down town / main street sport and recreation retail outlets and their ability/willingness to cooperate (e.g. joint wholesale buying, events sponsorship / promotion, newsletters, and notice-boards that pay specific attention to particular sports and recreations etc.).
4. Minority group and female sport and recreation industry developments.
5. Eco-recreation/tourism (i.e. bushwalking, abseiling, canoeing, caving etc.) and their impacts and necessary regulations and restrictions required to conserve/preserve regional natural resources.
6. Connections between tourism marketing and sport and recreation industry marketing.
7. Events and major event management.

8. Selective quality recruitment, training and professional development.
9. Continuing analysis / planning / leadership.
10. Regional partnerships / cooperative developments.

Some of these elements can be partially derived from the regional sport and recreation industry study whilst other elements need to be obtained from other sources or by using other tools and techniques to collect data and information.

Adding Value from Other Sources

The other major source of data used to add value to the data collected by this study are the data from the last three Censuses carried out by the ABS in 1986, 1991 and 1996. These data have been re-aggregated for Census 1986 and 1991 according to the new LGA boundaries created during the amalgamations that took place in Tasmania in the early 1990s. Consequently we get a reasonably clear picture of the trends in the indicators of social and economic change that have occurred in the period between 1986 and 1996.

Table 54: Broad Population Summary - Northern Region Tasmania

	1986	1991	1996	Change 1986-96	% Change 1986-96
Total Persons					
Males	59368	62795	63839	4471	7.5
Females	61119	64226	65925	4806	7.9
Persons	120487	127021	129764	9277	7.7
Aged 15 years and over					
Males	44499	47758	48975	4476	10.1
Females	46889	49989	51732	4843	10.3
Persons	91388	97747	100707	9319	10.2
Aboriginal & Torres Strait Islanders					
Males	725	832	1346	621	85.7
Females	756	919	1408	652	86.2
Persons	1481	1751	2754	1273	86

The broad population changes in the Northern Region of Tasmania between Census 86 and 96 indicate a pattern of structural change that shows services need to be expanded or rationalised according to rising or declining needs and demands consistent with the population changes as below:

a. Total population increased from about 120,500 to 130,000 (i.e. around 9,500);
b. Major contributors to the growth were West Tamar (plus ~2,500 or 20.5%) and Meander Valley (plus ~4,000 or 30.6%);

c. Significant decline occurred in Flinders (minus ~90 or 8.5%) and George Town (minus ~300 or 4.1%);

d. Launceston's population was relatively stable (plus ~900 or 1.5%) rising between 1986 and 1991 and declining between 1991 and 1996;

e. The remaining three LGAs increased throughout the whole period, that is Break O Day (plus ~600 or 12.5%), Dorset (plus ~500 or 7.3%) and Northern Midlands (plus ~450 or 4.1%); and

f. The Aboriginal and Torres Strait Islander population numbers increased by almost 1,300 or 86%.

Further value would be added to this data and analysis through the preparation of population projections using relevant figures on survival rates, fertility rates, in and out migration from the region and LGAs to show future population structures and assess future needs and demands for sport and recreation services.

Table 55: Age Summary - Northern Region Tasmania

	1986	1991	1996	Change 1986-96	% Change 1986-96
Age 0-4	9466	9602	9710	244	2.6
Age 5-14	19563	19603	19341	-222	-1.1
Age 15-24	19797	19739	18495	-1302	-6.6
Age 25-54	46812	51930	54284	7472	16.0
Age 55-64	10976	10641	11066	90	0.8
Age 65 or more	13803	15237	16592	2789	20.2

The changing age summary table (and other tables in Appendices) 'colours in' the pattern of structural change; in summary the details indicate that:

a. More young families with children aged 5 to 19 and parents 25 to 29 years of age moved out of the region between 1991 and 1996 than moved in;

b. More than 450 young adults 20 to 24 years of age moved out of the region;

c. Women chose to have more children and those women were more likely to be 30 to 39 years of age;

d. Almost 9,000 adults aged 30 to 59 years of age moved into the region with the largest proportion (almost 7,000) being 30 to 54 years of age;

e. Older adults and retirees (50 to 59 and 65+) increased by almost 3,200 although there was a drop of 280 in the 60 to 64 year age bracket; and

f. Of this older age group increase (~3,200) more than 1,800 were over 75 years of age.

These details suggest rising demand for older adults recreation services that include the passive sports and recreations for those wishing to remain active within the community and therapeutic recreation services for the frail aged who may be home bound or accommodated in various types of primary and secondary-type care institutions. These services may be added onto current sport and recreation services or integrated into the overall framework of home and community care, supported accommodation or institutional services such as nursing homes and, to a limited degree, hospitals, community based and/or allied health services.

Table 56: Median Age - Northern Region Tasmania

	1986	1991	1996	Change 1986-96	% Change 1986-96
Males	30	31	33	3	10.0
Females	31	33	35	4	12.9
Persons	30	32	34	4	13.3

The median age table for the Northern Region of Tasmania highlights the ageing of the regional community largely through greater longevity but possibly also by way of net migration into the region. This would suggest greater emphasis needs to be placed on leisure planning, retirement and support services (such as transport, day trips and holidays) for older adults with special emphasis on those services for the frail aged.

Table 57: Ethnicity Summary - Northern Region Tasmania

	1986	1991	1996	Change 1986-96	% Change 1986-96
Australian Born	107797	111818	112202	4405	4.1
Overseas Born: ESC	7143	8317	8048	905	12.7
Overseas Born: NESC	4396	4735	4781	385	8.8
Total Overseas Born	11539	13052	12829	1290	11.2
Birthplace Group as a Percentage of the Population					
Australian Born	89.5	88.0	86.5	-3.0	-3.4
Overseas Born: ESC	5.9	6.5	6.2	0.3	4.6
Overseas Born: NESC	3.6	3.7	3.7	0.0	1.0
Total Overseas Born	9.6	10.3	9.9	0.3	3.2

The ethnographic change taking place in the Northern Region of Tasmania shows:

a. Australian born people declined by more than 4,400 which meant their proportion of the total dropped by 3%;

b. Overseas born from English speaking countries (ESC) increased by more than 900; and

c. Overseas born from non English speaking countries (NESC) increased by almost 400.

Taken together with related ABS data reported above on non English speaking sport participation rates, there is a need for consideration of strategies to encourage greater responsiveness of services to the different cultural backgrounds by way of targeted translated information, accessing interpreter services as and when needed, and some consideration to recreation initiatives that may respond to specific interests or encourage specific cultural celebrations of or related to the ethnic groups that have arrived.

Table 58: Standardised Medians for Northern Region Tasmania					
Consumer Price Index used to standardise medians: 1991 & 1986 figures have been converted to 1996 equivalents					
	1986	1991	1996	Change 1986-96	% Change 1986-96
Median Individual Annual Income:					
Males	$21,500	$19,700	$17,800	($3,700)	-17.2
Females	$8,700	$9,700	$10,100	$1,400	16.1
Persons	$13,000	$13,300	$12,800	($200)	-1.5
Median Family Annual Income	$33,500	$32,400	$31,500	($2,000)	-6
Median Household Annual Income	$29,600	$27,000	$26,100	($3,500)	-11.8
Median Monthly Mortgage	$437	$484	$588	$151	34.6
Median Weekly Rent	$82	$88	$100	$18	22

The standardised medians (i.e. income, mortgages and rent levels above) demonstrate that overall real income levels declined significantly, with the specifics of those changes being:

a. Male incomes declined by $3,700 or more than 17%
b. Female incomes increased by around $1,400 or more than 16%;
c. Family annual incomes decreased by $2,000 or 1.5%;
d. Household annual incomes declined by $3,500 or 11.08%;
e. Monthly mortgages increased by $151 or 34.6%; and
f. Weekly rents increased by $18 or 22%.

Taken together, the median incomes in, and ‘collective wealth’ of, the region declined during the period thereby requiring careful consideration of sport and recreation industry developments that maintain financial access and equity in delivery according to the lower discretionary incomes of a higher proportion of individuals, families and households. Although female incomes have increased, many of these female incomes will have only slightly re-dressed the declining incomes of their male partners / husbands as evidenced in declines of family and household incomes.

Table 59: Labour Force Status for Northern Region Tasmania by Persons					
	1986	1991	1996	Change 1986-96	%Change 1986-96
Employed	47597	50193	50810	3213	6.8
Unemployed	5429	7468	6503	1074	19.8
Total Labour Force	53026	57661	57313	4287	8.1
Not in the Labour Force	36762	38595	41317	4555	12.4
Not stated LFS	1604	1586	1815	211	13.2
Total aged 15+	91392	97842	100445	9053	9.9
Unemployment Rate	10.2	13.0	11.3	1	10.8
Participation Rate	58.0	58.9	57.1	-1	-1.7
Employed: Working (both paid and unpaid)		Not in the Labour Force: Not working and not seeking work			
Unemployed: Not working but actively seeking work		Unemployment Rate: Unemployed / Total Labour Force			
Labour Force: Employed plus Unemployed		Participation Rate: Labour Force / Total Aged 15+			

Labour force status represented by the number employed, unemployed, the total labour force and related rates demonstrate that employment has grown at the same time as overall unemployment. People are also leaving the labour force or possibly retiring early and a combination of these factors is related to a slight decline in the participation rate. These figures are positive and negative factors for sport and recreation industry development in that constructive work opportunities create incomes and thereby sport and recreation opportunities for people whilst unemployment is either enforced leisure or anti-leisure that suggests low or no income and limited capacity to pay for, or spend funds, on sport and recreation opportunities.

Table 60: Unemployment Rates by LGA in Northern Region of Tasmania			
	1986	1991	1996
Launceston	10.7%	13.4%	11.8%
Break O Day	14.1%	21.1%	20.5%
Dorset	7.8%	10.5%	7.1%
Flinders	7.1%	14.2%	8.4%
George Town	12.1%	13.5%	16.7%
Northern Midlands	10.6%	11.8%	9.6%
Meander Valley	10.0%	11.6%	9.9%
West Tamar	7.5%	11.6%	9.8%

Each LGA has experienced relatively high unemployment rates (as shown in the table above) and these rates have impacted on the sport and recreation industry. Break O Day and George Town obviously need significant targeted intervention to assist in industry re-structure, employment generation and/or subsidisation of services to ensure equitable access and the creation of appropriate sport and recreation opportunities if their local populations are to enjoy the same opportunities as other LGAs in the region.

Table 61: Industry of the Employed - Northern Region Tasmania					
	1986	1991	1996	Change 1986-96	% Change 1986-96
Agric, Forestry, Fish & Hunting	4556	3821	3873	-683	-15
Mining	354	303	283	-71	-20.1
Manufacturing	7869	7338	7170	-699	-8.9
Electricity, Gas & Water	704	523	156	-548	-77.8
Construction	2849	2528	2826	-23	-0.8
Wholesale & Retail Trade	9362	9442	10155	793	8.5
Transport & Storage	2733	2559	2081	-652	-23.9
Communication	787	590	619	-168	-21.3
Finance, Prop & Business Services	3073	3404	4364	1291	42
Public Admin & Defence	1569	1638	1749	180	11.5
Community Services	8947	9532	9544	597	6.7
Recreation, Personal, Oth Serv.	3303	3723	5683	2380	72.1
Non-Classified & Not Stated	1570	4717	2309	739	47.1
Total	47676	50118	50812	3136	6.6
Industries That Have Maintained or Increased Their Proportion of Total					
Wholesale & Retail Trade	19.6	18.8	20.0	0.3	1.8
Finance, Prop & Business Services	6.4	6.8	8.6	2.1	33.2
Public Admin & Defence	3.3	3.3	3.4	0.2	4.6
Community Services	18.8	19.0	18.8	0.0	0.1
Recreation, Personal, Oth Serv.	6.9	7.4	11.2	4.3	61.4
Non-Classified & Not Stated	3.3	9.4	4.5	1.3	38
Total	100	100	100	0	0

Industry of the employed (represented in the table above) demonstrates that only three of twelve industry categories have grown significantly. Of these, the most significant growth was in the ‘recreation, personal and other services’ (i.e. almost 2,400 jobs). Although all of this growth will not necessarily be real growth nor will it be in recreation services alone, the overall structural changes suggests strategic industry planning and intervention could facilitate, enhance and improve the potential for further growth and the positive impacts of this growth. Service industry development needs to consider the feasibility of a wide range of opportunities and innovations (e.g. public / private child care for parents seeking leisure opportunities to commercially oriented children’s party services for under fives, such as those services designed to serve the needs of parents seeking alternatives to home-based parties etc.). The feasibility of personal training and coaching services for a variety active and passive sports and recreations needs to be assessed and encouraged, in addition to higher education and training for outdoor recreation and adventure programming personnel.

Table 62: Industry Sectors Northern Tasmania Compared to Australia (Census 96)		
Industry Sector	N. Region Tasmania	Australia

Primary (e.g Agriculture, Mining)	8.2%	5.3%
Secondary (e.g. Manufacturing, Construction)	20%	19.9%
Tertiary (e.g. Community Services, Recreation)	63.9%	66.6%
"Not Classified" & Public Admin. & Defence	7.9%	8.2%
TOTAL	100%	100%

In the table above, the primary industry sector is constituted by agriculture, forestry, fishing, hunting and mining; the secondary industry sector is constituted by manufacturing, electricity, gas, water and construction and the tertiary sector is constituted by communication, finance, property, business services, community services, wholesale and retail trade, transport, recreation, personal and other services. Further declines can be expected in Northern Tasmania's primary industry sector with growth expected in the tertiary sector (and possibly also in public administration) if national averages and these regional figures are any guide.

Table 63: Highest Qualification Obtained by Persons - Northern Region Tasmania

	1986	1991	1996	Change 1986-96	% Change 1986-96
Degree or higher	3088	5047	7161	4073	131.9
Diploma	2761	4831	5159	2398	86.9
Skilled Vocational	8484	9403	10043	1559	18.4
Selected Groups as % of Total:					
Degree or higher	3.4	5.2	7.1	3.7	110.5
Not Qualified	65.1	65.7	63.9	-1.2	-1.9

Highest qualification obtained (represented in the table above) demonstrates that education retention, continuing and higher education attainment rates are contributing to 'professionalisation' of the labour force. In addition, skilled vocational qualifications are increasing in number leaving the overall proportion of unqualified people in slight decline. These details suggest a need to ensure the appropriate range and types of qualifications are being provided in the institutions providing education and training services suited to sport and recreation industry development.

Trends in (and Perceptions of) Demand and Supply in the Industry

The diagram below provides a general demand--supply analysis of the details provided in Sections 2, 3 and 4 above according to the various trends and perceptions identified and their expected impact on the regional sport and recreation industry.

Diagram 6: Broad Trends/Perceptions Impacting on Demand & Supply in the Regional Sport & Recreation Industry

RISING DEMAND	RISING SUPPLY
Wider array of opportunities (with amenities)	Older people for passive recreation pursuits

Eco-recreation / tourism opportunities Facilities for health / fitness activities Some sports (soccer etc.) & extreme recreations. Functional open space and links for cycling etc. Time specific competitions & time-tabling	Recreation and sporting goods & equipment, e.g. computer games, extreme sports, etc. Professional recreation workers Some facilities that have been improved Vehicles for shared travel to opportunities
DECLINING / FORGONE DEMAND	DECLINING / FORGONE SUPPLY
Guns and shooting facilities Facilities that are under maintained Some low cost recreation opportunities Evening / week-end leisurely activities All year accessible / indoor facilities Some low impact, low energy, sustainable activities	Certain industries / income for facilities/services Volunteers to support club activities Young people in rural areas to join clubs/participate 'After hours' voluntary professional involvement in organising programs due to risks of legal recourse Opportunities for mothers, elderly, disabled etc.

Trends and local perceptions of growth or decline broadly suggest industry planning should be structured to build on and strengthen some trends in a manner which focusses investment on quality, safety, innovation and development in the industry and facilitates growth in response to expected demand, needs and general expectations.

The diagram below also summarises details provided in Section 2, 3 and 4 on industry opportunities and threats to strengthening / weakening the regional economy in Northern Tasmania. It points towards strategies that could be developed by the NTMO, its Recreation Committee and the Office of Sport and Recreation (Tasmania) and used to develop the sport and recreation industry and thereby enhance its contribution to the regional economy. Importantly, the analysis provided in the diagram needs to be complemented by addressing a set of questions (below the diagram) to ensure strategies are practical and achievable within the political, economic, social, environmental, technological and legal constraints operating on the NTMO.

Diagram 7: Sport and Recreation Industry Development Framework

Industry Development Opportunities	***Opportunities--Threats***		**Industry Development Threats**
Strengthening Regional Economy	Ageing population. Rising education levels. Growing tourism. Targeted grants & private investment. Longer shopping hours. Rising service industries.	P/T -- low income jobs replacing F/T jobs. Declining median per capita incomes. The wider array of recreation choices (e.g. computer games). Manufacturing decline.	***Weakening Regional Economy***
	Increased: vehicle ownership, recognition of environment, recognition of leisure rights and commitment	Rural de-population. Structural unemployment. Declining voluntarism. Retail trade / consumption down.	

	to equal opportunity. Adoption of professional *codes*	Increased imports of recreation goods.	
Factors Contributing to Recovery	***Opportunities--Threats***		**Factors Contributing to Decline**

The key questions on strengths are therefore - is the sport and recreation industry capable of being developed, improved, extended, expanded, made more accessible, equitable and responsive to the market--community by:

a. Pro-actively working with recreation industry stakeholders?
b. Developing human resources connected to sport and recreation provision?
c. Developing recreation projects according to need and targeting resources accordingly?
d. Building better facility planning and management potential?
e. Taking advantage of ‘best practice’ ideas in and about the recreation industry?
f. Maintaining close working relationships between the NTMO and stakeholder groups?
g. Effectively communicating with recreation facility managers, users and residents?
h. Using new technology to enhance communications?
i. Achieving greater user group self sufficiency?

Key leading questions on weaknesses are therefore; is the sport and recreation industry capable of addressing decline due to:

a. Limited commitment to strategic planning and over-attention on administration?
b. Having minimal commitment to recreation industry research and evaluation?
c. Unnecessarily bureaucratic procedures?
d. Placing spurious time constraints on important strategic decisions?
e. Defending the status quo without realistically evaluating the alternatives?
f. Continuing outmoded facility allocation and management practices?
g. Allowing outdated maintenance and work practices?
h. Avoiding reviews of outdated management systems?
i. Insulating recreation facilities and services from community evaluation?
j. Believing limited evaluation is providing legitimate accountability to the community?
k. Responding grudgingly to industry stakeholders, service and facility users’ and residents’ concerns?

The key leading questions on opportunities are therefore; is the sport and recreation industry capable of developing the industry by seizing opportunities to:

a. Regularly provide information to industry stakeholders?
b. Promote the value of active and passive recreation participation?
c. Actively mobilise the whole community to achieve balanced input to decisions?
d. Cultivate neutrality in decision making bodies to enable them to umpire or mediate in controversial processes?
e. Seek analysis and criticism from relevant experts on certain developments and proposals because they have reputable knowledge and understanding of the impacts?
f. Openly test the strength of local feeling about issues / proposals before they proceed?
g. Lobby central government authorities on behalf of or in collaboration with industry stakeholders?
h. Form project advisory groups to provide effective local input?
i. Attend meetings of user groups to enable monitoring of agendas and activities?
j. Publicise NTMO meetings and seek regular input from industry stakeholders?

Key questions on threats tend to be largely political in nature and need to be carefully formulated through the NTMO to ensure the threats are not exaggerated or used to undermine the development of a regional sport and recreation industry development strategy.

Of all the measures of success in economic development programs, median incomes are very revealing and useful. If these indicators suggest decline is taking place then industry development strategies (or the absence of strategies) need to be changed (or developed). Census data allows the tracking of these indicators by LGA and defined sub-areas , the region, State or whole Australian economy. They can also be compared with similar regions. Two important measures are generally used to gauge economic--industry development; they are the long term trend in employment and the labour force participation rate. Comparing these ‘bottom line’ indicators against other regions and the national average helps to reveal relative positions. Other measures not compiled in this study that would be useful in measuring regional sport and recreation industry development could be:

a. Increases in dollar value of new loans to relevant businesses.
b. Growth / decline in number of self-employed/employed in relevant organisations.
c. Number and rate of new sport and recreation business formations / closures.
d. Investment levels in relevant infrastructure (facilities, signage, site hardening for camping, paths, tracks, etc.).
e. Growth / decline in relevant venture capital.
f. Increase / decrease in tourism / travel dollars spent.
g. Creation / development of other regional industry programs (e.g. tourism, higher, adult and vocational education, relevant manufacturing etc.).
h. Improvement in balance and diversity of employment in the industry.

i. Improvement in balance and diversity of education and training in the industry.

Clearly, identifying the ‘relevant’ sport and recreation (and related) businesses and organisations is the most useful starting point but unfortunately, much of the time, industry development is not tracked by many, if any, of these measures. A comprehensive sport and recreation industry development strategy would and should create, at least, some of these indicators and track them over time.

Contributions to an Industry Development Strategy

Most importantly, a sport and recreation industry planning framework should emphasize:

- The legitimacy of government partnerships with sport and recreation organizations
- Provision of leadership in sport and recreation industry development within local areas and across the region;
- The concept of industry development occurring within a framework of sport and recreation aims, objectives and targets;
- A social--economic focus to industry planning with a research base for measuring development and community needs and monitoring improvements;
- The need to facilitate inter-sport and recreation links between local public, private--commercial and voluntary organizations;
- The development of a shared vision and strategy for sport and recreation organisations with other bodies to overcome decline, fragmentation and gaps in sport and recreation services; and
- The social and economic benefits to be gained from developing the sport and recreation industry

Within the planning framework for sport and recreation industry development in the region the NTMO Recreation Committee should encourage key decision makers in the sport and recreation industry to utilise strategic planning approaches to recreation issues. In addition it should seek to generate renewed interest in sport and recreation as part of a more integrated planning function amongst a wide range of players in the region.

Local government staff, sports and recreation centre operators, retailers and voluntary club administrators all make pricing, funding, investment and marketing decisions and develop facilities and programs which have an impact on sport and recreation industry development. The aim should therefore be to establish a situation where sport and recreation is not just the remit of the Office of Sport and Recreation, any one Council in the region or the Future Game Plans project but is seen as the collective responsibility of sport and recreation organisations and each local government authority in the region through a well orchestrated systems approach and sport and recreation industry planning framework.

Other key aspects of regional sport and recreation industry planning with local government involvement could include the continued development of the web site and, maybe a multimedia based resource kit and the initiation of pilot and good practice planning projects. There is an obvious gap in available resources for local government sport and recreation planning that this project seeks to address. Guidelines for industry planning *per se* are generally broad and do not address the specifics of the sport and recreation industry and current issues in the industry such as funding for partnership projects and the like. Consequently, a resource kit could be electronically based and interactive *via* use over the Internet. The purpose could be to provide an accessible, up-dateable and easy to follow information resource for local government officers (and newly appointed sport and recreation staff) responsible for sport and recreation industry management, planning, coordination and service provision. A component of the industry strategy could therefore involve establishing the feasibility of providing information resources *via* the Internet.

Good practice planning projects could involve grants to individual councils and, in order to work well, a documented model planning and development process in support of relevant sport and recreation organisations should be developed. A set of priority issues should be nominated and councils invited to participate on the basis of confirming, reviewing or addressing one of these issues within the framework of regional sport and recreation industry development priorities.

An industry development strategy is basically dependent on building competitive sport and recreation businesses and cooperative local sport and recreation communities within the region which:

1. Welcome opportunities created by the changing economy and initiate new and innovative strategies that focus on both short term (e.g. helping current organisations or getting small sport and recreation businesses off to a start) and long term results (e.g. building infrastructure that is identified as needed).

2. Pursue wider (national and international) markets, emphasise foreign languages -- cultural awareness and training and expose their own communities to ‘foreign’ visitors.

3. Promote skills training, increased education and professionalisation of the workforce and widespread use of technology.

4. Insist on quality schools and pre-schools, early childhood development, adult literacy programs and employee / managers training programs because they prepare the industry - workers, managers and volunteers - for the more specialized, highly skilled and demanding jobs and requirements of the future.

5. Identify local/regional leisure and cultural assets and natural resources, have a comprehensive management program that is sensitive to development's effects on assets, local communities, the economy and industries in the region.

6. Diversify their sport and recreation industry development strategy beyond one focus (such as 'events management') to include: existing business development, entrepreneurship, eco-recreation/tourism opportunities, training, proper consideration of quality of life and environmental impact issues and continuing services innovation and improvement.

7. Create broad-based pro-active leadership with a team orientation that includes people with disabilities, older adults, indigenous people, minority groups and women because empowering others is as essential as removing fixed conceptions about leadership roles. (And)

8. Partner with the State / Commonwealth Governments by emphasising benefits to the region (rather than arguing regional disadvantages unless those disadvantages are clearly documented). Such communities also develop regional initiatives and realise that they can benefit from a "neighbour's" success.

To assist readers of the whole report, the executive summary is provided at the beginning as an introduction to the study and a value added set of industry related trends, estimates and strategic planning ideas. It also provides directions and actionable recommendations suited to the NTMO making decisions about the development of a sport and recreation industry strategy. The executive summary, as an action plan for the NTMO, is compatible with State and Federal regional economic policy and industry development planning but it is appropriate that a regional sport and recreation industry development strategy has unique emphases and particular initiatives suited to the special characteristics of Northern Tasmania. The choice and achievement of the precise strategic directions and initiatives ultimately rests with the NTMO but, it is emphasised, the strategy should be based on appropriate research and development, such as in this report, and following through with a professional approach to the necessary planning and decision making processes, undertaken in careful consultation with local communities and key decision makers within the regional sport and recreation industry.

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Appendix

Survey Form

Project Steps/Phases

Step 1 - Collaborative development of the survey instrument with the Recreation Committee through exchanges by Fax, Email and Internet with the Executive Officer. Agreement reached on content of self completion questionnaire form and telephone interview.

Step 2 - Identification of survey sample size/s, contacts, phone numbers, addresses for the survey activities. Agreement reached on sample design and implementation procedure.

Step 3 - Survey conducted as a major set of self completion forms mailed to all regionally based sport and recreation organisations/businesses with follow-up reminder letters/phone calls complemented by a smaller set of telephone interviews targeted to non respondents.

Step 4 - Preparation of progress reports and final report in relevant formats on the whole study after obtaining comments and feedback from NTMO Recreation Committee members.

Local Government Recurrent Expenditure on Recreation - Northern Tasmania

Local government expenditure on recreation in the region is significant, although it often overlaps with other areas of Council expenditure (e.g. culture, tourism, education, amenities, building maintenance etc.) and points towards the potential for expenditure reviews that might lead to useful opportunities for future consolidation, amalgamation of facilities, re-allocation from some services to others, divestment and investment decisions as part of budget and strategic sport and recreation industry development planning.

Table: Local Government Recurrent Expenditure on Recreation - Northern Tasmania

Local Government Area	Recurrent Expenditure on Recreation		
	1998/1999	1999/2000	Change
Break O Day	$222,200	$217,460	-4740
Dorset	$282,938	$255,234	-27704
Flinders	$32,900	$33,750	850
George Town	$369,953	$463,836	93883
Launceston	$5,596,000	$5,758,500	162500
N. Midlands	$561,725	$482,713	-79012
Meander Valley	$382,200	$395,000	12800
West Tamar	$927,792	$758,228	-169564
TOTAL	$8,375,708	$8,364,721	-10987

Note: Expenditure details supplied by local government authorities