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COMMUNITY SPORT VOP PROGRAMME 2016/17



APRIL 2017

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INTRODUCTION

- This report looks at the **2016/2017 Total Results** for the VOP Programme for National Sports Organisations (NSOs) to understand the club experience of their members. *For more information about the background and objectives of the VOP Programme and this research please refer to the 'Background, Objectives and Approach' section.*
- It includes results for surveying undertaken during winter 2016 and summer 2016/2017. The table below shows which NSOs participated in 2016/17 and which participated in 2015.

SUMMER 2016/17	WINTER 2016	ALL SPORTS 2015
Sport A	Sport D	Sport B
Sport B	Sport G	Sport D
Sport C	Sport H	Sport H
Sport E		Sport K
Sport F		
Sport I		
Sport J		

- When comparing results between 2016/17 and 2015, please be aware of the different sports surveyed as this is likely to impact total results.
- All members of clubs for each of the participating NSOs had the opportunity to participate, with adults aged 16+ completing the questionnaire themselves ('players') and parents/caregivers ('parents') completing the questionnaire for children under the age of 16, on behalf of their child.

EXECUTIVE SUMMARY

- Overall, the key metrics on how clubs are performing are consistent with 2015.
 - Three in five (61%) are very or extremely satisfied (the same as in 2015)
 - NPS is down slightly (+40 compared with +43 in 2015)
 - The likelihood to re-join next season remains at four in five (82% cf. 83% 2015)
 - There is a higher proportion who indicate they are satisfied with the joining process (53% cf. 47%)
 - Value for money is significantly higher than in 2015, with three quarters (74%) indicating the opportunities, services and benefits that they receive from their club make it well worth the money that they pay (ct. 69%).
- One in six (16%) are new members (less than one year). Sport A and Sport I players are significantly more likely to be new members (27% and 28%, respectively) along with females (17%), and those of Māori (21%), Pasifika (29%), Asian & Indian (23%) ethnicity.
- Over the length of membership each of the key metrics decline, before increasing. Members of 3-5 years in tenure are *significantly lower* on each of the key metrics, while members of more than 10 years record a higher level of satisfaction.
- Half of respondents (45%) have been members of another club. Players are significantly more likely than parents of players to change clubs (55% cf. 15%). Of those who have changed club, the main reason for change is location i.e. they moved (48%), followed by better opportunities to fulfil their potential (8%) and to change grades/play in another team (5%).
- *Allowing me to fulfill my potential, being professional and well managed, fair and equal opportunities and fostering a sense of pride* are areas of lower performance and higher importance to the overall club experience, that needs addressing to drive recommendation.

EXECUTIVE SUMMARY - CONTINUED

- One in seven (15%) would not want anything to be improved if the improvements meant their fees would increase. Sport F (22%), Sport I (20%), Sport B (17%), and Sport G (17%) are *significantly more* likely to indicate that they don't want to improve anything if it means their fees need to increase.
- If fees were to increase, nearly one in five (18%) indicate their focus for improvement would be *player development programmes*. The highest rated aspect among parents is *quality of coaching or instructors*, which is significantly higher than for players (31% cf. 10%).
- Adults (16+), in particular males aged 16+, have significantly higher levels of satisfaction across all of the key metrics. Adult females (16+) are consistent with the total across all of the key metrics, however, they are significantly less likely to perceive value for money (72% cf. 74%) and significantly more likely to recommend their club. Primary/intermediate members (5-12 years), whether male or female, are significantly less likely to indicate they are satisfied across all of the key metrics.
- Across regions, clubs in Hawkes Bay outperform all other regions in overall satisfaction (72% cf. 61%), and likelihood to recommend (NPS 56). Those who reside in Northland are significantly more likely to be promoters (72% cf. 58%) and perceive value for money (81% cf. 74%), as are Waikato (78%) and Wellington/Wairarapa residents (78%).

NOTES TO THIS REPORT

Statistical Significance

Statistically significant differences are highlighted or commented on in this report. Where no highlighting has been used (or no commentary included about a sub-group), it may safely be assumed that differences from the average/ total are not statistically significant or they are not pertinent.

- Statistically significant differences in this report are significant at the 95% confidence level. That is, we are 95% confident results are not just normal expected variances that result from talking to a different sample within the same population (the smaller the sample size the higher the expected variance between samples). The individual NSO results are unweighted with significance testing against the weighted average for all sports.
- Statistical significance is reported in the following ways:
 - ▼ or - The Total Sport result is significantly lower than the All Sports result for the current year or the individual NSO significantly lower than the Total Sport result.
 - ▲ or - The Total Sport result is significantly higher than the All Sports result for the current year or the individual NSO significantly higher than the Total Sport result.

Note: When we are comparing the results for individual sports against the All Sports result, the All Sports result is a weighted average and the individual sport results are unweighted.

Throughout this report we have commented mainly on subgroup differences for 'top 2' results, and only added subgroup differences for the 'bottom 2' results where relevant.

Total

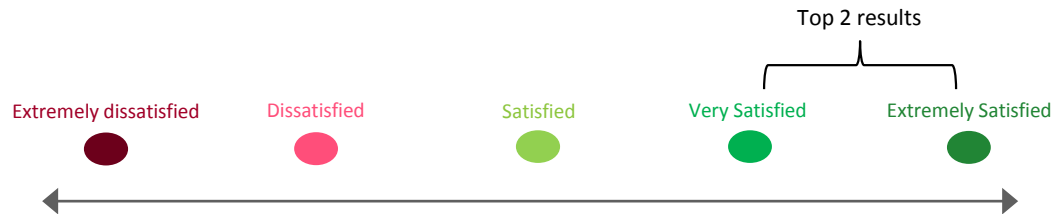
Where 'All Sports XXXX' is used this refers to the results for the total sample in that year i.e. a weighted average of all the sports that participated. Significance testing of Total Sport results are done using unweighted results for each sport vs. the weighted All Sports result.

Rounding of Figures

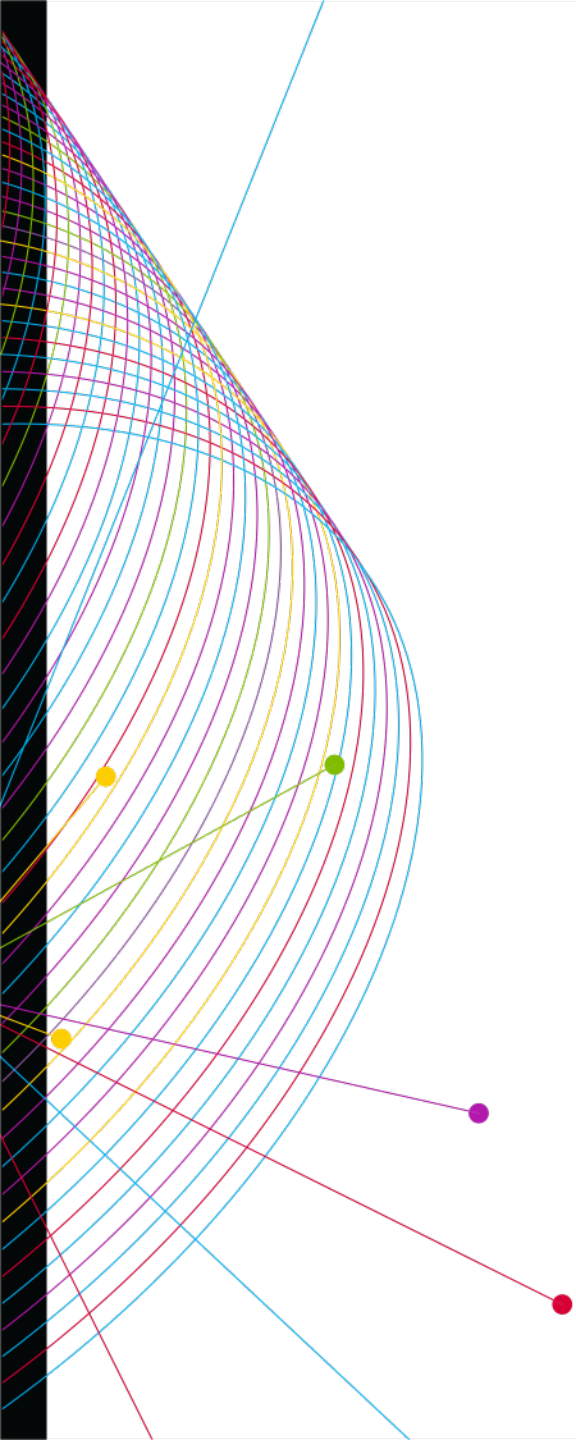
Due to rounding the net figures provided (% very satisfied + extremely satisfied) may differ to the numbers shown on the charts.

NOTES TO THIS REPORT

- Throughout the survey for questions regarding a member's level of satisfaction we use the positively skewed satisfaction scale shown below:



- When we report the results for the percentage that are *satisfied* we are referring to the 'top 2' results i.e. the percentage that are either 'very satisfied' or 'extremely satisfied'.
- We use positively skewed scales because this means the neutral ratings are divided between dissatisfaction and satisfaction (as opposed to a neutral mid point in a balanced scale). It also gives the opportunity for some of the very satisfied to be 'delighted'. This results in more variation/ greater discrimination compared to a balanced scale. In addition, a neutral option offers people an option not to think. If this is really true, then they have the 'don't know/ can't say' option to select.
- Data has been weighted at the total level i.e. each sport has equal contributions to the total. This should be taken into consideration in the regional and demographic analysis because the demographic data, e.g. age or region, is not representative of the population.
- Finally, in a competitive world today, is good...good enough? Good (or just satisfied) does not necessarily build strong relationships. We want members to rate their experience more than just satisfied, so they are real advocates and positively endorse their club and sport.



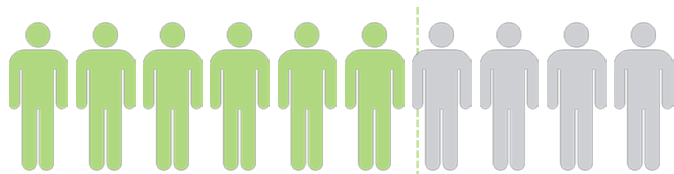
KEY METRIC RESULTS

OVERALL HOW ARE CLUBS PERFORMING?

The level of overall satisfaction has remained consistent with 2015 (61%). The NPS score has lowered to 40, from 43 in 2015.

OVERALL SATISFACTION

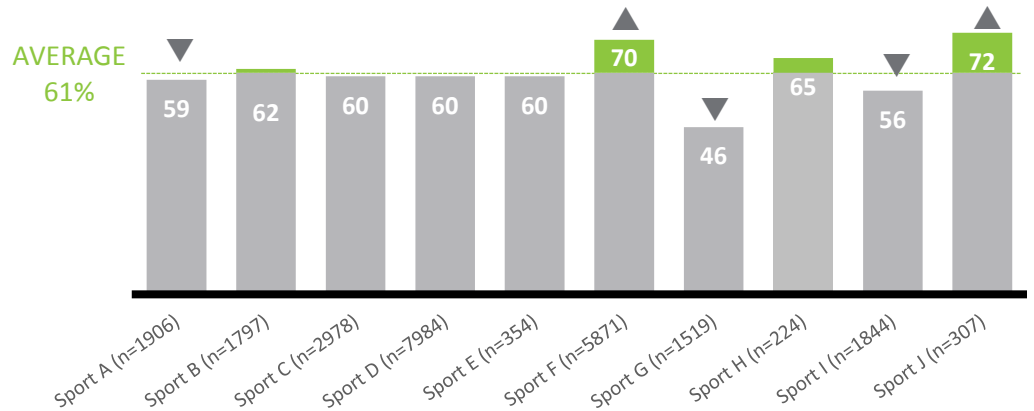
(Q6: % very satisfied or extremely satisfied)



61% ARE SATISFIED WITH THEIR CLUB

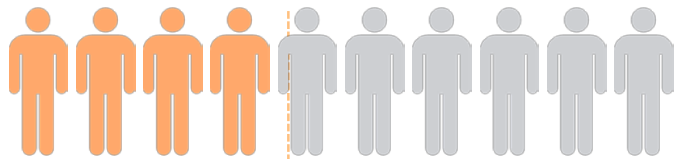
61% ALL SPORTS 2015

OVERALL SATISFACTION (BY NSO) - % very satisfied or extremely satisfied



NET PROMOTER SCORE

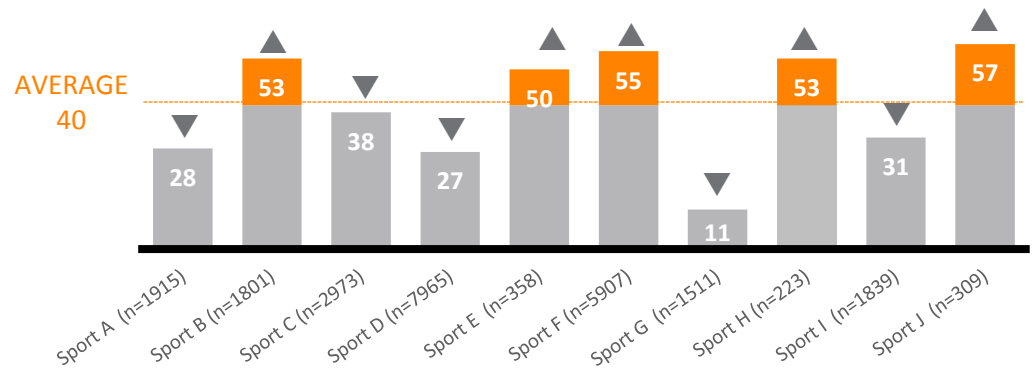
(Q7: % promoters less % detractors)



NPS SCORE OF 40

43 ALL SPORTS 2015

NPS (BY NSO) - % promoters less % detractors



Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)

Q6. To what extent are you satisfied or dissatisfied with the/ your child's overall experience of <playing> <sport> at your/ their <club>? (n=24784)

Q7. Imagine someone is interested in <playing> or participating in <sport >. If they asked you, how likely are you to recommend your/ your child's <club> to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely? (n=24801)

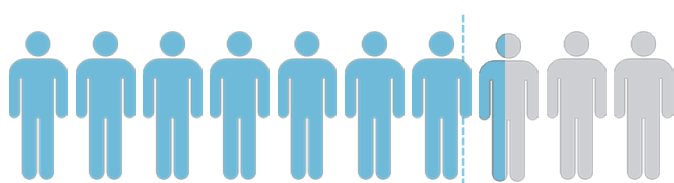
▲ ▼ Significantly higher/lower than Total

OVERALL HOW ARE CLUBS PERFORMING?

There has been a significant increase in those who agree or strongly agree that the opportunities, services and benefits are worth the money that they pay (74% cf. 69% 2015).

VALUE FOR MONEY

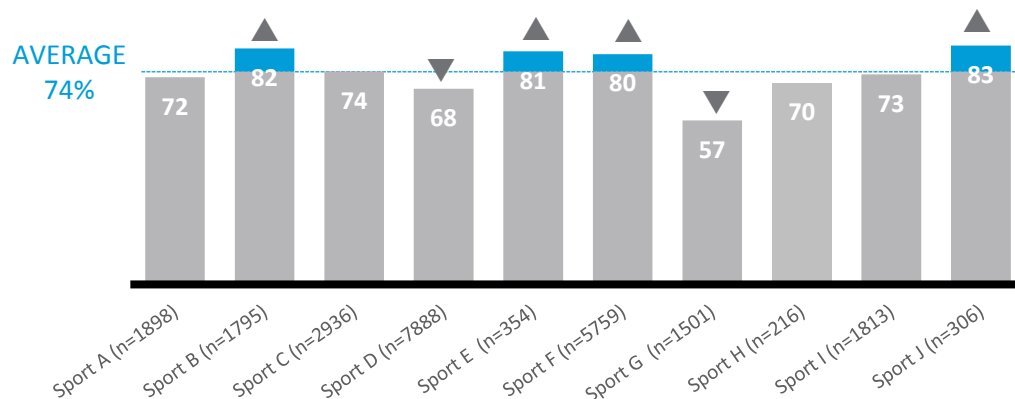
(Q11: % agree or strongly agree)



74% PERCEIVE VALUE FOR MONEY

69% ALL SPORTS 2015

VALUE FOR MONEY (BY NSO) - % agree or strongly agree



LIKELIHOOD TO REJOIN

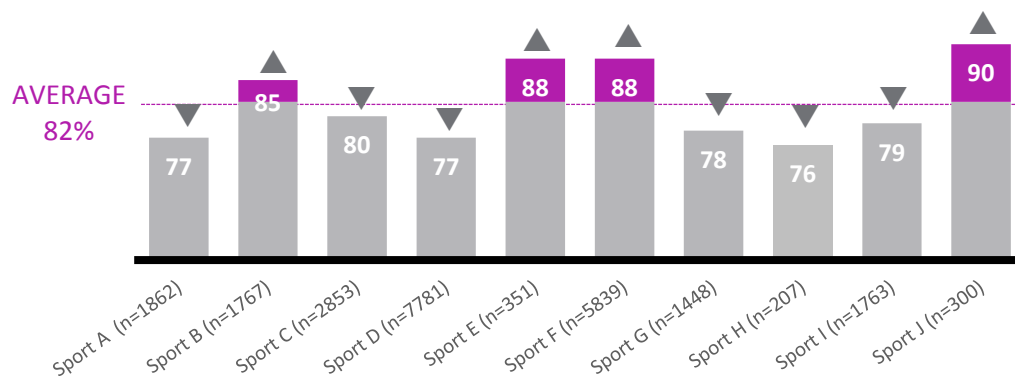
(Q9: % quite likely or very likely)



82% ARE LIKELY TO REJOIN

83% ALL SPORTS 2015

LIKELIHOOD TO REJOIN (BY NSO) - % quite likely or very likely



Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable) (n=24466)
 Q11. To what extent do you agree or disagree with the opportunities, services and benefits that I/ your child receive/ receives from my/ their <club> make it well worth the money I/ you or they pay
 Q9. How likely are/ is you/ your child to <play> for or rejoin <insert club from Q2a> next season? (n=24171)

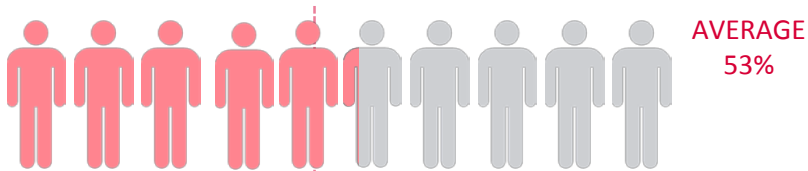
▲ ▼ Significantly higher/lower than Total
 □ (Green) □ (Red) Significantly higher/lower than All Sports 2015

OVERALL HOW ARE CLUBS PERFORMING?

There has been an increase in the proportion of respondents who are satisfied with their club's joining process (53% cf. 47% 2015).

JOINING PROCESS

(Q20: % very satisfied or extremely satisfied – average of 4 attributes)

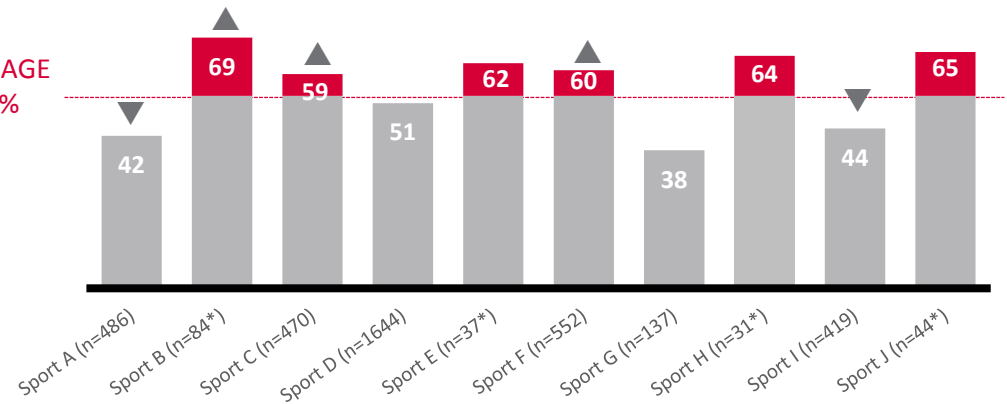


53% ARE SATISFIED WITH THE JOINING PROCESS

47% ALL SPORTS 2015

JOINING PROCESS (BY NSO)

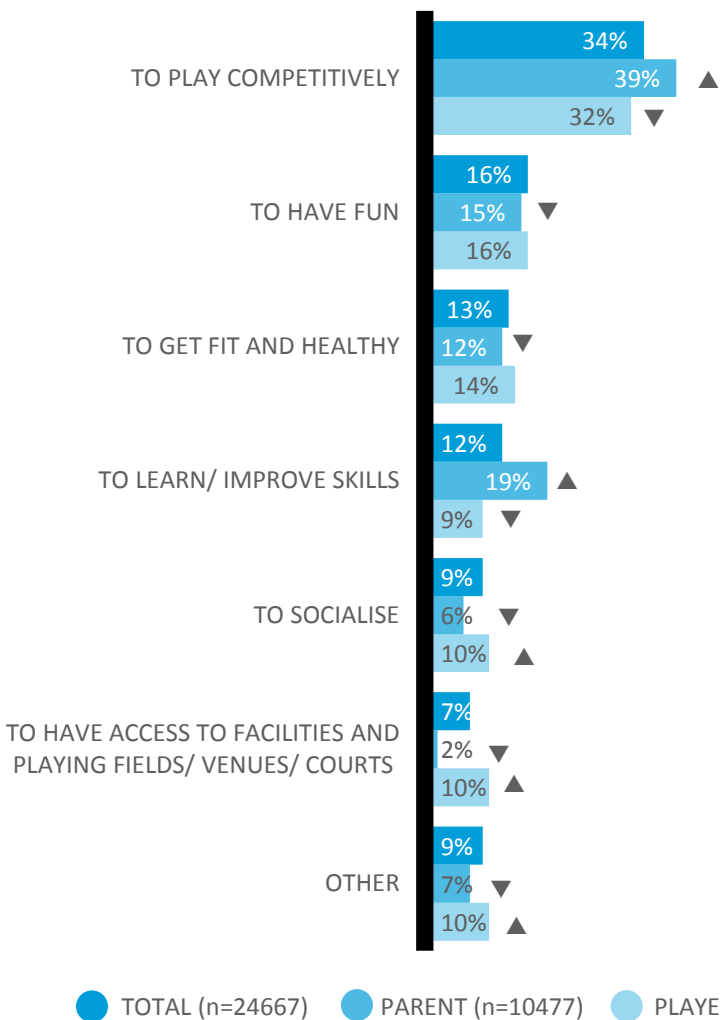
% very satisfied or extremely satisfied – average of 4 attributes



An abstract graphic on the left side of the page. It features a vertical black bar on the far left. From this bar, a series of thin, curved lines in various colors (blue, green, yellow, orange, red, purple) fan out towards the right. Some of these lines terminate in small colored dots. Additionally, several straight lines of different colors extend from the curved lines towards the right side of the page, ending in larger colored dots. The overall effect is that of a complex, multi-colored network or data visualization.

MAIN FINDINGS

THE MAIN REASON TO BELONG TO A CLUB IS TO PLAY COMPETITIVELY



A third of members (34%) belong to a club in order to play competitively. Parent of players are *significantly more* likely to indicate this is the main reason their children belong to a club, compared with players themselves (39% cf. 32%). This is followed by *learn/ improve skills* for parents (19% cf. 9% players). For players, the main reasons to belong to a club (other than to *play competitively*) is to *have fun* (16%), *get fit and healthy* (14%) and to *socialise* (10%).

OTHER REASONS TO BELONG TO A CLUB INCLUDE:

All of the above - they enjoy it, make long lasting friendships with like minds, have fun and they enjoy being competitive - our kids are outdoor kids.
(Sport A parent)

Love the sport been playing since I was a young child now I'm 30 and have only had one season off.
(Sport C player)

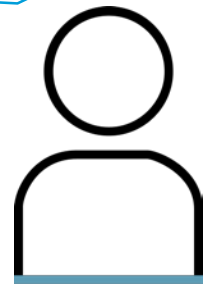
To continue with my passion, stay competitive, access to facilities and opportunity to continue using my skills in Sport C games. To get involved in sporting community.
(Sport C player)

Discount at other clubs.
(Sport F player)

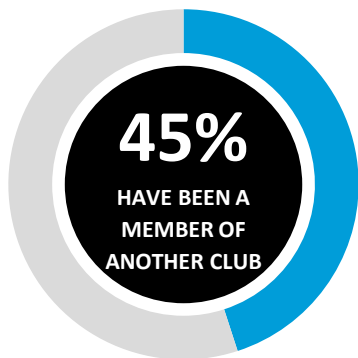
To get a Sport F handicap.
(Sport F player)

Friendship and competition.
(Sport B player)

To give back to the club by coaching.
(Sport J participant)



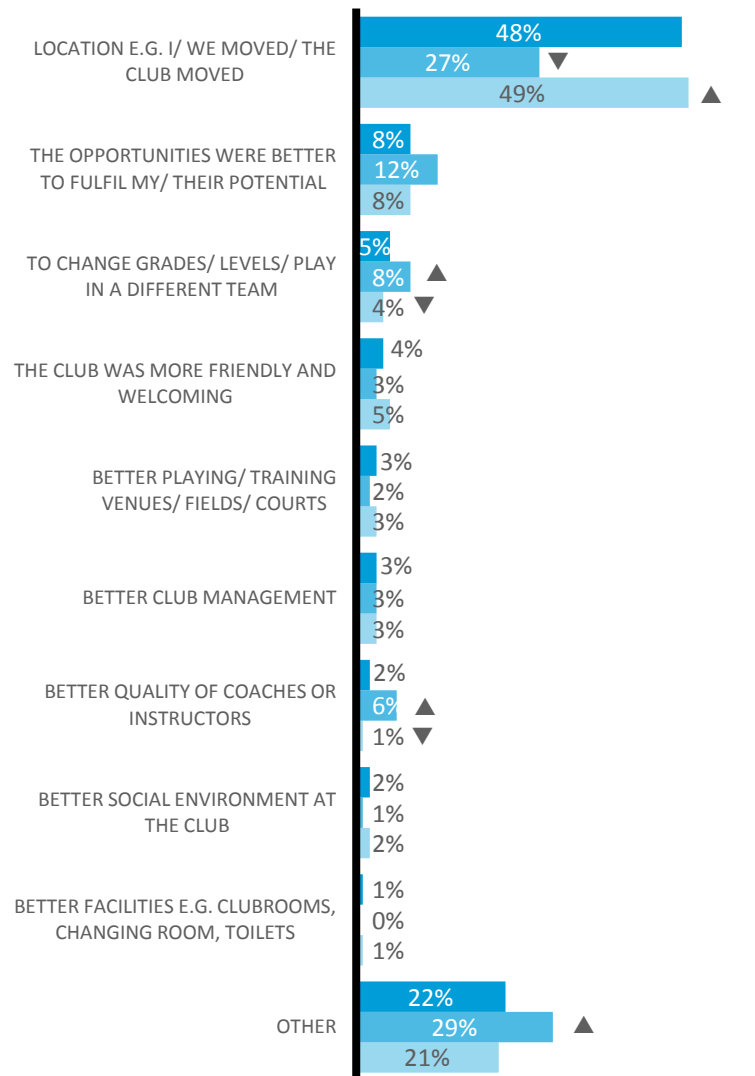
HALF OF RESPONDENTS HAVE BEEN A MEMBER OF ANOTHER CLUB



Of the respondents who have been members of another club, almost half (48%) indicated that the main reason they changed club was because of *location i.e. they moved*. Less than one in ten (8%) changed club for *better opportunities to fulfil their potential*.

Those who have been a member of another club are *significantly more* likely to be:

- Players (55% cf. 15% parents of players)
- Members for more than 10 years (56% cf. 45% total)
- Members who belong to *play competitively* (53%), *socialise* (49%), *have access to facilities and playing fields/ venues/ courts* (60%)
- Playing or training *four or more times a week* (59%)
- Those who complained in the last 3 months (61%)
- Male (48% cf. 39% female)
- Those who represented New Zealand at an international event/ competition (74%)
- Those aged 25-34 (50%), 35-44 (53%), 45-54 (54%), 55-64 (56%), 65+ (60%)
- Coach or instructor (60%), Committee member (50%), Official/ referee/ umpire/ judge (57%), President or another office holder (51%) and/or Paid employee (74%)

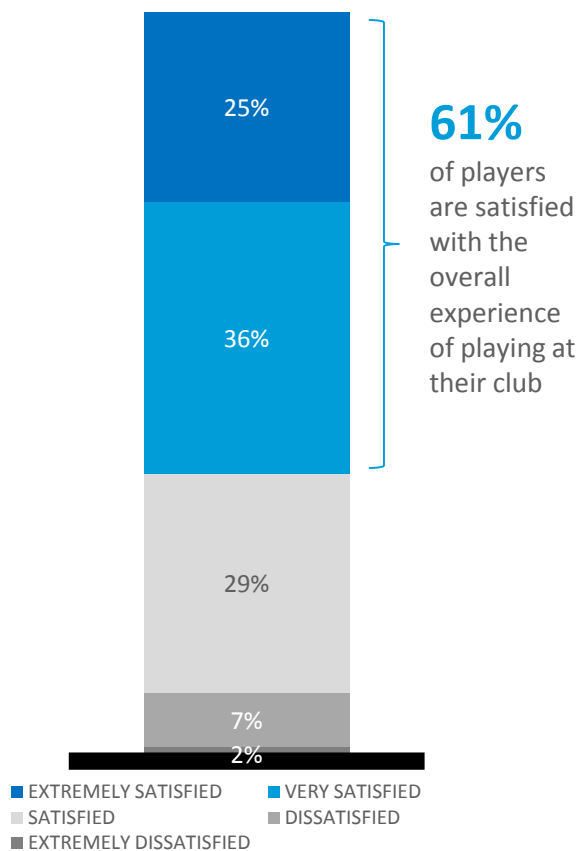


● TOTAL (n=7533) ● PARENT (n=523) ● PLAYER (n=7010)

▲ ▼ Significantly higher/lower than Total

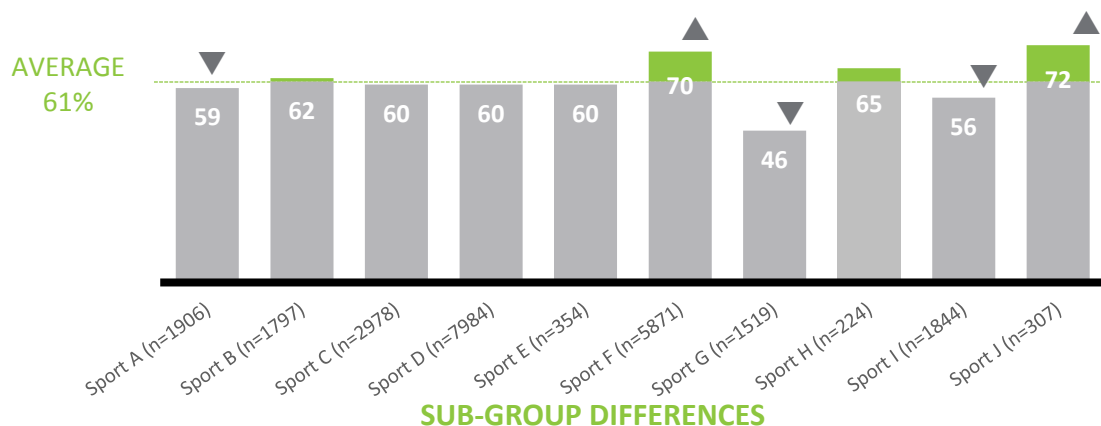
Base: Respondents who are members (n=14982)
 Q31. Have/ Has you/ your child ever been a member of another <sport> <club>?
 Base: Respondents who are members(excluding don't know or can't remember) (n=7533)
 Q32. What is the main reason you/ your child changed <sport> <club>s?

HOW SATISFIED ARE THEY WITH THEIR CLUB?



Three in five respondents (61%) are very or extremely satisfied with their/their child's club. Respondents belonging to Sport J (72%) and Sport F (70%) clubs are *significantly more* likely to be satisfied with the overall experience of playing at their club.

OVERALL SATISFACTION (BY NSO) - % very satisfied or extremely satisfied



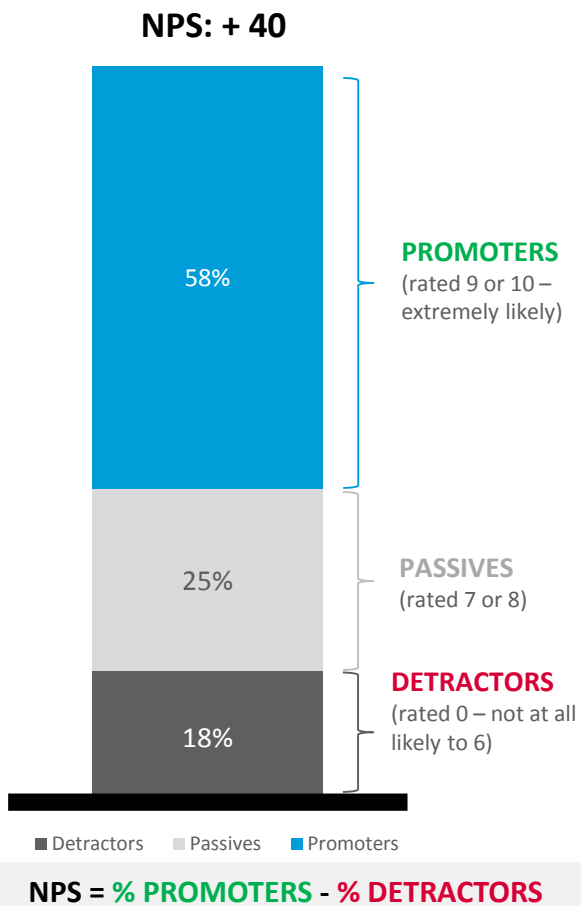
Those *significantly more* likely to be very or extremely satisfied are:

- Players (63% cf. 57% parents of players)
- Members for more than 10 years (65% cf. 61% total)
- Members who belong to *have fun* (63%)
- Those who play or train *four or more times a week* (67%)
- Those who have changed clubs because the club was more *friendly and welcoming* (71%) or *there are better playing/training venues/fields/courts* (74%)
- Those who have not made a complaint in the last 3 months (65%) and are very likely to rejoin next season (69%)
- Male (63%)
- Those aged 55-64 (67%), 65+ (66%)
- NZ European (63%)
- Committee members (70%), Official/ referee/ umpire/ judge (66%), and/or President or another office holder (71%)
- Players represented the club at a regional event/ competition (66%) and/or region at a national event/ competition (66%)

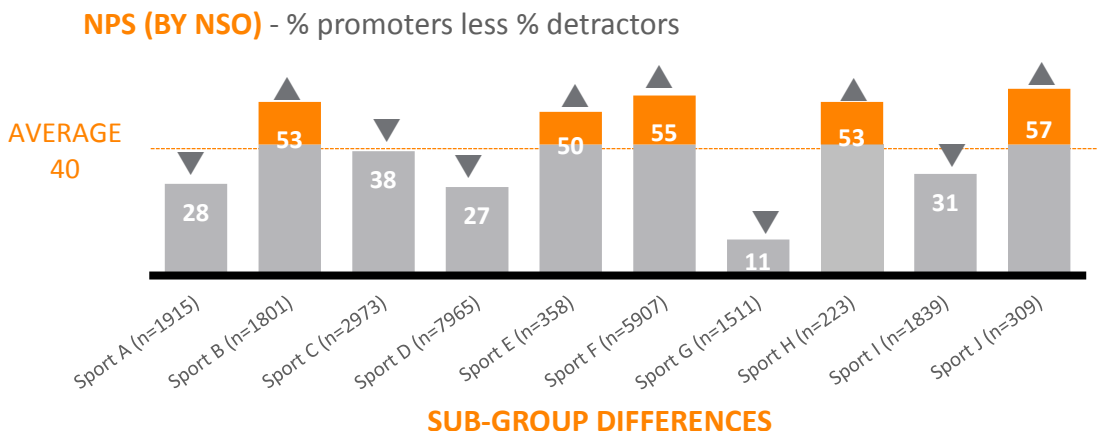
Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable) (n=24784)

Q6. To what extent are you satisfied or dissatisfied with the/ your child's overall experience of <playing> <sport> at your/ their <club>?

NET PROMOTER SCORE: HOW LIKELY ARE THEY TO RECOMMEND THEIR CLUB?



Three in five respondents (58%) are promoters, rating their likeliness to recommend as 9 or 10 (out of 10), a net NPS score of 40. This figure is *significantly higher* for respondents belonging to Sport J (57), Sport F (55), Sport B (53), Sport H (53) and Sport E (50) clubs.



Those *significantly more* likely to be promoters are:

- Players (62% cf. 48% parents of players)
- Members for more than 10 years (70% cf. 58% total)
- Members who belong to *socialise* (61%), *have fun* (61%), and *have access to facilities and playing fields/ venues/ courts* (63%)
- Those who play or train *four or more times a week* (63%)
- Likely to rejoin next season (65%) and have not made a complaint in the past three months (61%)
- Male (59%)
- Those aged 55-64 (67%), 65+ (72%)
- NZ European (61%) and/or Māori (62%)
- Coach or instructor (66%), Committee members (76%), Official/ referee/ umpire/ judge (64%), and/or President or another office holder (78%)
- Players who have played for top team at club (60%), represented the club at a regional event/ competition (62%) and/or region at a national event/ competition (61%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable) (n=24801)
 Q7. Imagine someone is interested in <playing> or participating in <sport >. If they asked you, how likely are you to recommend your/ your child's <club> to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

WHAT DO THEY LOVE ABOUT THEIR CLUB...

1. Very welcoming to new members and supportive environment. 2. Down to earth current members who are not snobby or cliquy. 3. Sport F draws are mostly not with the same group of players. 4. A well managed club. 5. The course and greens are very good and regularly maintained. 6. The fees are affordable by most low and average earners.

(Sport F player)

Friendly both socially and when participating ...also the encouragement shown to new bowlers ... support for players at all levels when playing.

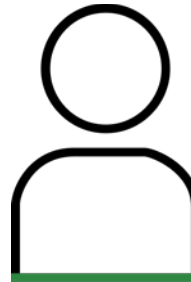
(Sport B player)

The opportunities and encouragement from the club is outstanding. The way the senior club involves the junior players and welcomes them at all levels is something I have not seen at other sports clubs. The way the club coaches are keeping kids in the game for the future at all levels is fantastic.

(Sport C parent)

They are accepting of all athletic abilities and promote having fun and giving all children the same opportunities. The communication between the club and parents is exceptional.

(Sport A parent)



Club has a friendly atmosphere, members are competitive but friendly, no cliques all members treated as equals and all given same opportunity to participate in activities.

(Sport B player)

Many enthusiastic and highly competent members who contribute wholeheartedly to the club and development of other members... Great member participation. Reliable people, planes, ground equipment and a great soaring location.

(Participant)

A good course - well maintained. Pleasant company. Reasonable/comfortable 'after round' facilities. Good communications with members.

(Sport F player)

Organisation - it is run really well. All children are included equally - no matter what their ability. It is lots of fun. Coached by variety of club members including youth - which is great.

(Sport C parent)

WHAT NEEDS TO IMPROVE...

1. Help people to improve. It is the only club I have been a member of where there is very little skill development on offer. 2. Retain junior members. 3. above is one of the reasons they leave. 4. Attract and retain new senior members, most are members because their kids are. 5. Go for club runs in more interesting places than running the streets.

(Sport A participant)

A culture change would be required. The "mood" of the club is unfriendly, comprised of cliques and old-boys' groups, and down right opposed to new-comers.

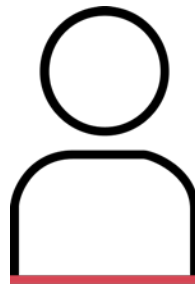
(Participant)

More info and support for new comers (e.g regarding different disciplines, how programme works, sort out uniforms), more feedback on child's progress, more focus on technique and skills, more efforts to build up club feeling, more communication.

(Sport A parent)

I believe there needs to be an effort to welcome new members into the club. As newbies we don't inherently know your club facilities and a guided tour would make us feel more at home.

(Participant)



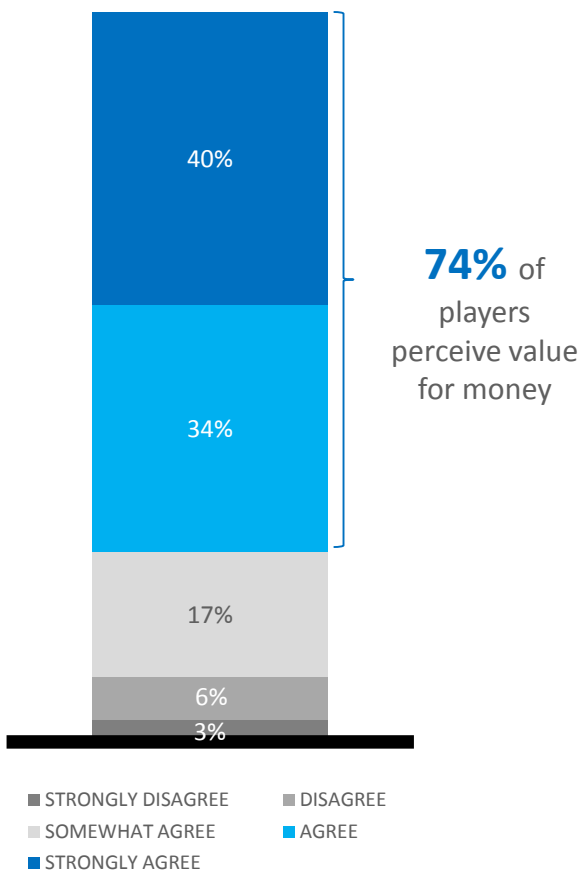
A proper junior programme which recognises that juniors are the key to a strong club. There is zero junior co-ordination...You are issued with a kit bag (which is usually incomplete) and advised when prize giving is. That is the total extent of [Club] involvement. Individual team coaches and managers do all the work. There is a complete disconnect between the Senior and Junior club. No training, no coaching, no leadership, no organisation.

(Sport C parent)

Poor communication. The club needs to email, text and Facebook. Especially for parents. If you don't have Facebook you never know what's happening. Secondly, coaches pick their teams before the season and coach only the one team for that grade. It's appalling. It gives no hope to other kids in that grade, knowing they will always be in the number 2 or 3 team. Each coach should manage the whole grade with help from assistant coach. The club needs to look at their club registrations and send notices out well before the beginning of season. Again the communication is slack. This club of hundreds is dwindling down, not only in numbers but on a medal scale also.

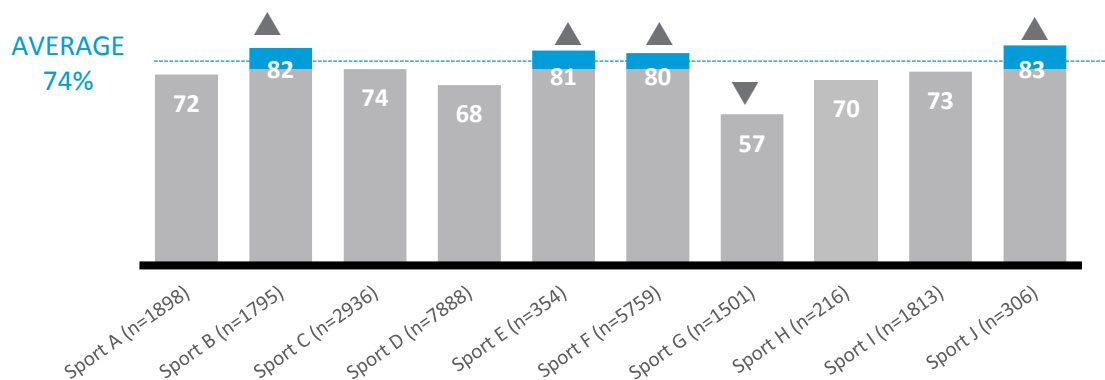
(Sport J participant)

THREE QUARTERS PERCEIVE VALUE FOR MONEY



Three quarters (74%) strongly agree or agree that the opportunities, services and benefits are worth the money that they pay their/their child's club. This figure is *significantly higher* for respondents who belong to Sport F (80%), Sport E (81%), Sport B (82%) and Sport J clubs (83%).

PERCEIVE VALUE FOR MONEY (BY NSO) - % agree or strongly agree



SUB-GROUP DIFFERENCES

Those *significantly more* likely to perceive value for money are:

- Players (76% cf. 71% parents of players)
- Members for more than 10 years (78% cf. 74% total)
- Members who belong to *have fun* (79%)
- Those who play or train *four or more times a week* (78%)
- Very or extremely satisfied with the overall experience at their club (91%)
- Those who have not made a complaint in the last 3 months (77%) and very likely to rejoin next season (86%)
- Male (76%)
- Those aged 45-54 (78%), 55-64 (83%), 65+ (84%)
- NZ European (79%)
- Committee members (84%), Official/ referee/ umpire/ judge (78%), President or another office holder (87%) and/or paid employee (88%)
- Players who have represented the club at a regional event/ competition (78%) and/or region at a national event/ competition (78%)

▲ ▼ Significantly higher/lower than Total

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable) (n=24466)

Q11. To what extent do you agree or disagree with...The opportunities, services and benefits that I/ your child receive/ receives from my/ their <club> make it well worth the money I/ you or they pay

WHAT DO MEMBERS NEED, TO BE MORE SATISFIED WITH VALUE FOR MONEY

Better communication about how to access services and benefits from the club. It seems that much just happens, but there is not an open and welcoming culture to athletes to participate.

(Sport A participant)

Overall promotion of referees to a high standard, promotion of retention of teams, adequate prize money on offer.

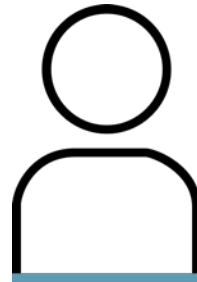
(Sport I player)

Better stations for the kids, I don't mind paying a bit more if we are gonna get good coaches and the kids do more athletic type stations, my child asked today what long jump was and we have been there for 2 years!

(Sport A parent)

Good access to grounds, opportunities to play wide range of schools and continue further with schools v schools in the area and regional Sport I tournaments. I would recommend extra coach training, cards and example drills.

(Sport I parent)



There would need to be more input (coaching, encouragement, advice to athletes), it felt like for the subs we paid it is difficult to see the benefits provided. On club nights coaching was generalised and in very large groups, and there was no input at Saturday competition.

(Sport A parent)

Getting a quality match ball, having communication about education opportunities in areas like umpiring or scoring, having a sense of being included in the clubs thinking and planning. Getting an opportunity to play at the club grounds more than once every two or three seasons.

(Sport C player)

More one on one technical training to help develop my skills more.

(Sport C player)

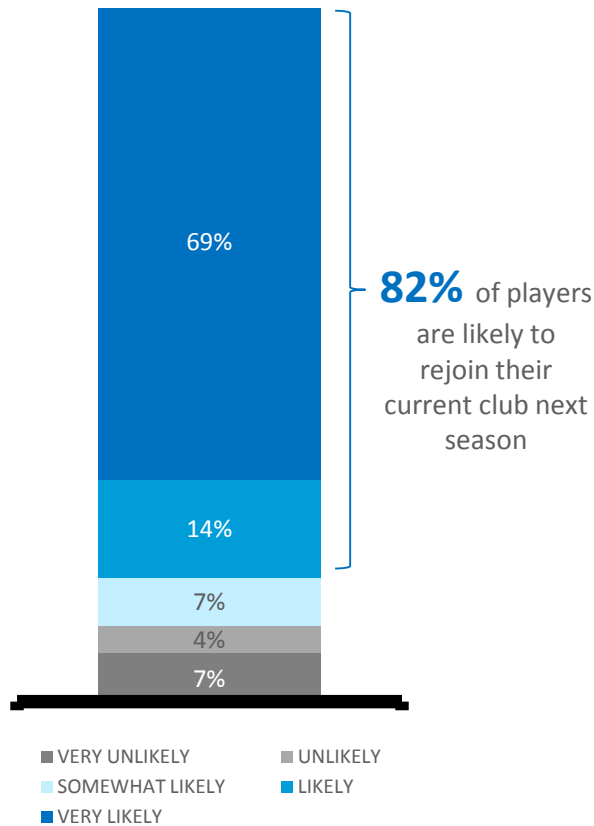
Greens need to be upgraded and maintained to ensure they are of an acceptable standard. Better communication from committee to members.

(Sport F player)

Base: Respondents who are dissatisfied/extremely dissatisfied or disagree/strongly disagree (n=309)

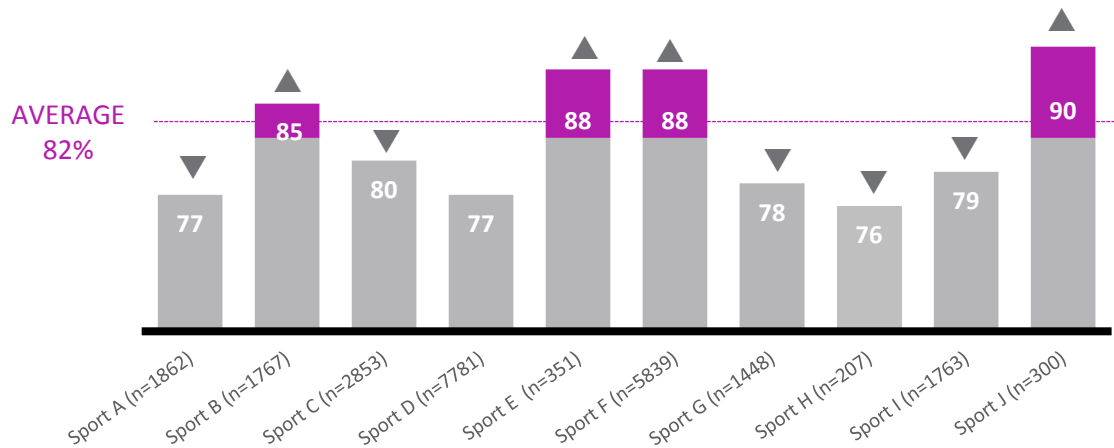
Q12. What would you need from your club to be more satisfied with *the opportunities, services and benefits that I receive from my club make it well worth the money I pay?* Note: for the full list of verbatim comments please refer to the excel file

MORE THAN FOUR IN FIVE ARE LIKELY TO REJOIN THEIR CURRENT CLUB NEXT YEAR



Just over four in five (82%) are likely or very likely to rejoin their current club next season. Members of Sport H (15% cf. 11% total), Sport A (13%), and Sport D (13%) clubs are *significantly more* likely to indicate they are unlikely to rejoin.

LIKELIHOOD OF REJOINING NEXT YEAR (BY NSO) - % likely or very likely



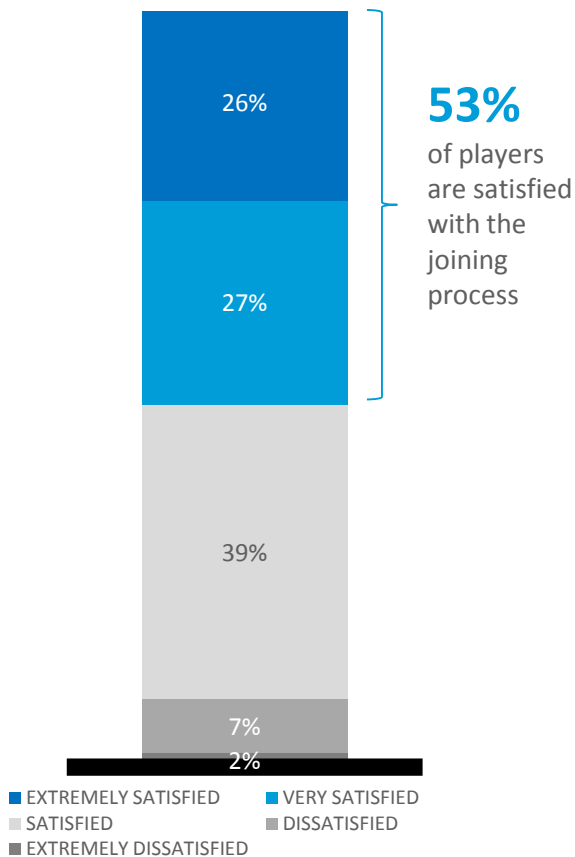
SUB-GROUP DIFFERENCES

Those *significantly more* likely to indicate they will likely rejoin next year are:

- Players (84% cf. 77% parents of players)
- Members for more than 10 years (86% cf. 82% total)
- Members who belong to *have access to facilities and playing fields/venues/courts* (87%)
- Those who play or train *four or more time a week* (86%)
- Those who have not made a complaint in the last 3 months (84% cf. 67% of those who haven't made a complaint)
- Coaches (86%), Committee Members (90%), and/ or Presidents or another office holder (90%)
- Those who have represented their club at a regional event/ competition (85%)
- Those aged primary/intermediate (5-12 years) (13%)

Base: Respondents who are members (Excluding Don't know/not applicable) (n=24171)
 Q9. How likely are/ is you/ your child to <play> for or rejoin <insert club from Q2a> next season?

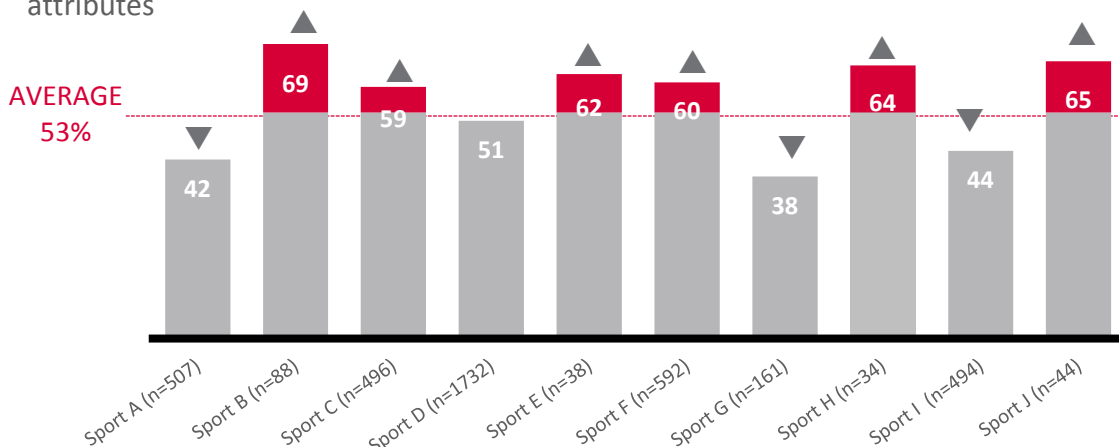
HOW IS THE JOINING PROCESS RATED?



Over half (53%) of respondents are happy with the joining process that they went through when they/their child joined their club.

Sport B (69%), Sport J (65%), Sport H (64%), Sport E (62%), Sport F (60%), and Sport C (59%) members are *significantly more* likely to indicate they are very or extremely satisfied with the process they went through when they joined the club.

JOINING PROCESS (BY NSO) - % very satisfied or extremely satisfied – average of 4 attributes



SUB-GROUP DIFFERENCES

Those *significantly more* likely to indicate they are very or extremely satisfied with the joining process are:

- Players (60% cf 45% parents of players)
- Those who play or train *two or three times a week* (57% cf 53%) or *four or more times a week* (63%)
- Those who have been members of another club (60%)
- Those who are very likely to rejoin next season (66%) and who have not made a complaint in the last 3 months (54% cf. 29% of those who have made a complaint)
- Those aged 16-24 years (63%)
- Those who have played for the top team at their club (61%), represented their club at a regional event/competition (63%) and/or region at a national event/ competition (63%)
- Males (55% cf. 50% females)

Base: Respondents who have been a member for less than one year (Excluding Don't know/not applicable)
 Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their <sport> <club>. How satisfied are you with your/ their <club> on the following...

IN THE LAST THREE MONTHS...

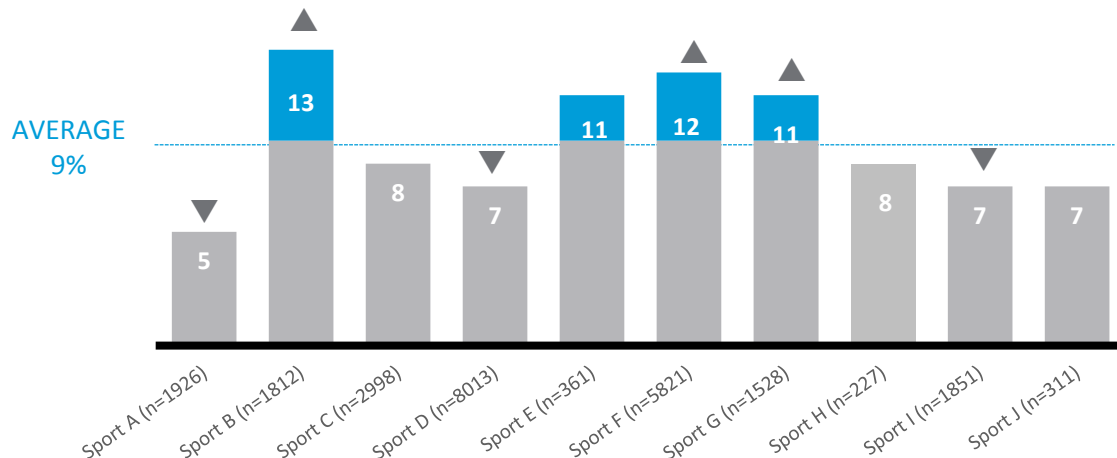


Overall, a *significantly higher* proportion of Sport B (13% cf. 9%), Sport F (12%) and Sport G (11%) players have complained to their club in the last three months.

Sport A has a *significantly lower* proportion of respondents who have complained (5% cf. 9%).

Those who complained are *significantly more* likely to indicate they are dissatisfied or extremely dissatisfied with their overall experience at their club (30% cf. 5% that are very or extremely satisfied) and unlikely to rejoin their current club next season (15%).

COMPLAINED IN PAST THREE MONTHS (BY NSO) - % made a complaint



SUB-GROUP DIFFERENCES

Those *significantly more* likely to have complained in the last three months are:

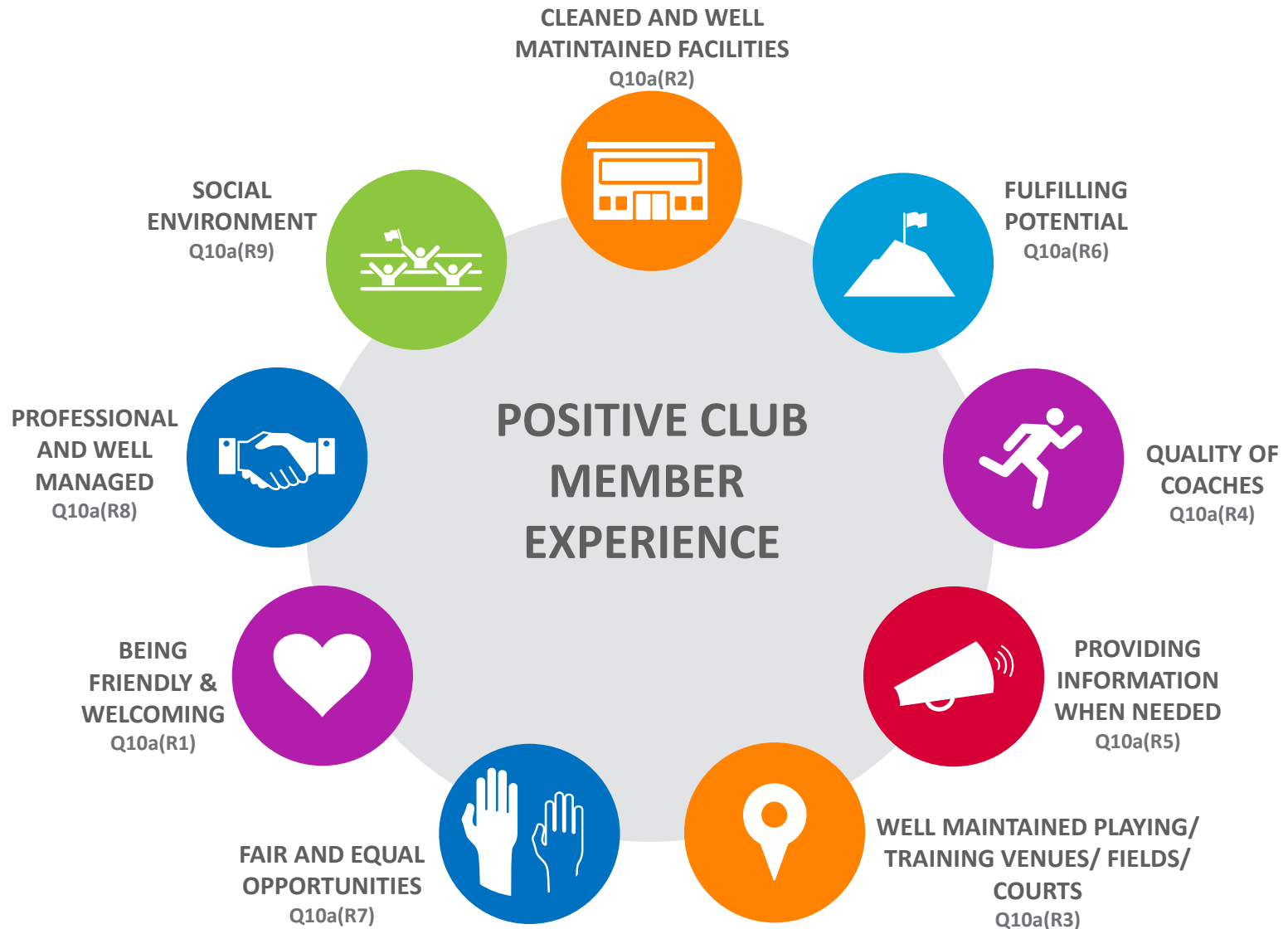
- Members (9% cf. 4% casual players)
- Players (10% cf. 7% parents of players)
- Members for more than 5 years (12% cf. less than 5 years 7%)
- Members who belong to *play competitively* (11%) and *play or train more than four times per week* (12%)
- Previously members of another club (12% cf. respondents who have not been members of another club 6%)
- Those aged 65+ (12%)
- Players who have played for top team at club (10%) or represented their club at a regional event/ competition (10%)

An abstract graphic on the left side of the slide. It features a vertical black bar on the far left. From this bar, a series of thin, curved lines in various colors (blue, green, yellow, orange, red, purple) fan out towards the right. Some of these lines end in small colored dots. Additionally, several straight lines of different colors (blue, green, purple, red) extend from the dots back towards the black bar, creating a complex, web-like structure.

WHAT IS CAUSING THESE RATINGS?

DRIVERS OF THE CLUB EXPERIENCE

The qualitative stage, undertaken as part of the development of the VOP questionnaire, identified seven factors that influence club experience. After the initial pilot of the VOP questionnaire this was expanded to nine core factors. The question numbers that relate to each factor are shown below.



DRIVERS OF THE CLUB EXPERIENCE CTD

As well as the nine 'core' drivers of the club experience, based on the pilot results and in consultation with National Sporting Organisations (NSOs) the VOP survey also covers a number of secondary factors. These are shown below with the associated question number.

- Value for money (Q11)
- Encourages good sportsmanship and fair play (Q10b-R1)
- The ease of accessing the club's venues/ fields/ courts for training or casual playing (Q10b-R2)
- Fostering a sense of pride in the club (Q10b-R3)
- Engaging with the local community (Q10b-R4)
- Being responsive to needs and requirements (Q10b-R5)
- Having qualified officials available for competition (Q10b-R6)
- Providing a safe environment for adults and children (Q10b-R7)
- Making aware of development occurring across New Zealand in terms of training, equipment, new programmes, coaching and officiating, club and event management (*optional*) (Q10b-R8)
- Providing information and opportunities for coach development (*optional*) (Q10b-R9)
- Providing information and opportunities for officials development (*optional*) (Q10b-R10)
- Providing information about junior programmes (*optional*) (Q10b-R11)
- Communicating with you about the coaching, officiating and event opportunities and development providing by <NSO> (*optional*) (Q10b-R12)
- Making aware of the benefits provided as a member of an NSO (*optional*) (Q10b-R13)

In addition, individual NSOs had the opportunity to add other factors considered important or topical for their sport, if required.

Note: The wording of some statements were tweaked slightly for different NSOs to ensure relevancy. Wording variations are shown in the footnotes in the following section.

EXPLANATION OF REGRESSION

- Regression is a statistical process for estimating the relationship between a dependent variable and one or more independent variables (or 'drivers'). It helps us to understand the importance or impact of a 'driver' by measuring its contribution to explaining variance in the dependent variable. It assigns a score ranging from zero to one - the higher the score, then the more important/ impact the attribute has. We have used a regression approach called Modified Kruskal, which addresses any multi-collinearity issues.
- For the VOP project this year we have focused on the regression for recommendation (so recommendation is the dependent variable) to understand what is driving the NPS score*.
- We have created a regression model for each individual sport based only on the data for that sport and the factors that were answered by that sport's respondents (including any optional or additional factors). (Note: previously we created one overall model that used the data from all sports but only included the core factors of the club experience answered by all sports).
- The following chart shows the impact of the drivers on recommendation on the vertical axis (from the regression model), and how members are rating their satisfaction with their club on each of these drivers on the horizontal axis. This allows us to see what is more important but rated lower and that is where clubs should focus to improve recommendation and NPS.

* Note: we also did two other regressions using Satisfaction and Value for Money as the dependent variables and these are included in the Appendix.

WHAT IS DRIVING THE NPS RESULT?

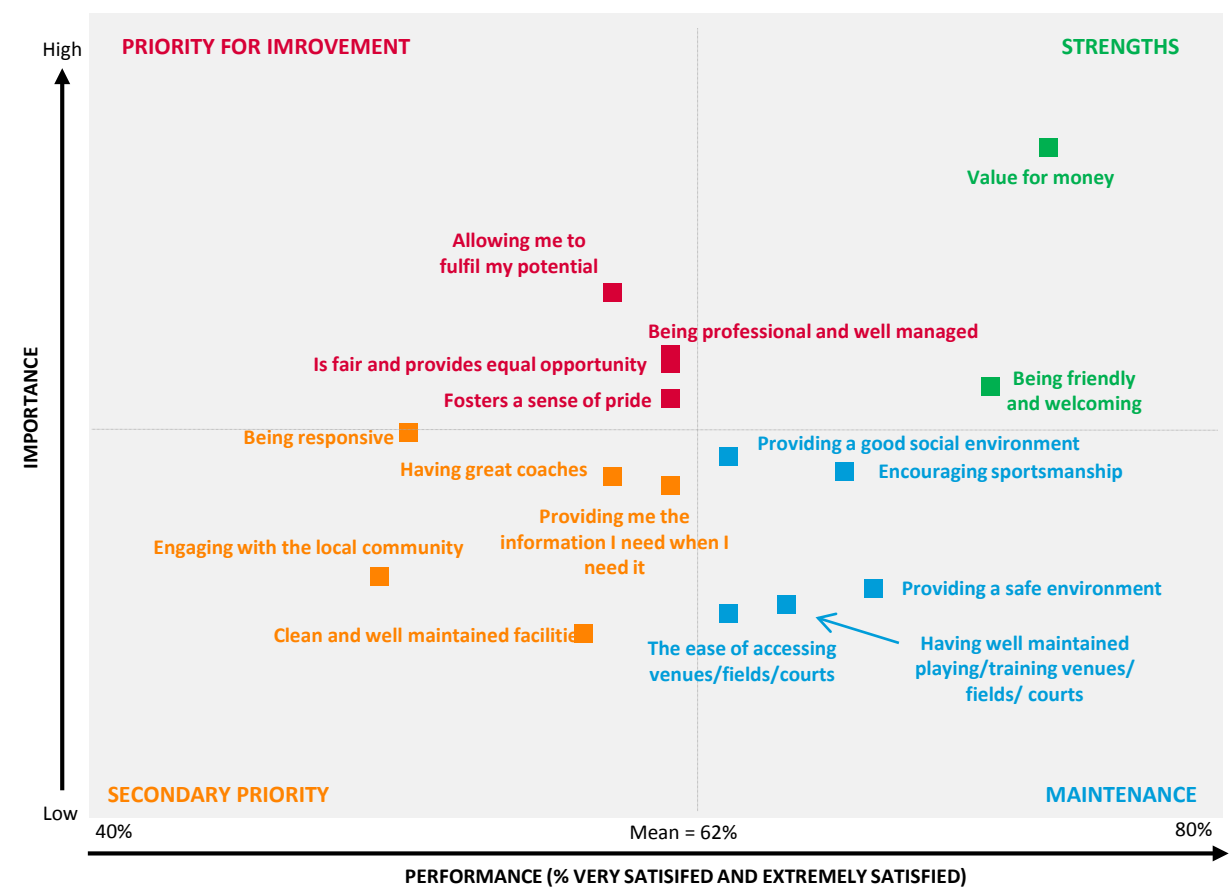
While all the attributes are important, the top three drivers of recommendation of a club are:

1. Value for money
2. Allowing me to fulfill my potential
3. Being professional and well managed.

Allowing me to fulfill my potential, being professional and well managed, fair and equal opportunities and fostering a sense of pride are in the priority for improvement quadrant (higher importance, lower performance).

Having clean and well maintained facilities, engaging with the local community, having great coaches, being responsive to my needs and requirements and providing the information when needed are seen as secondary priorities.

Being friendly and welcoming and perceived value for money are considered strengths of clubs.

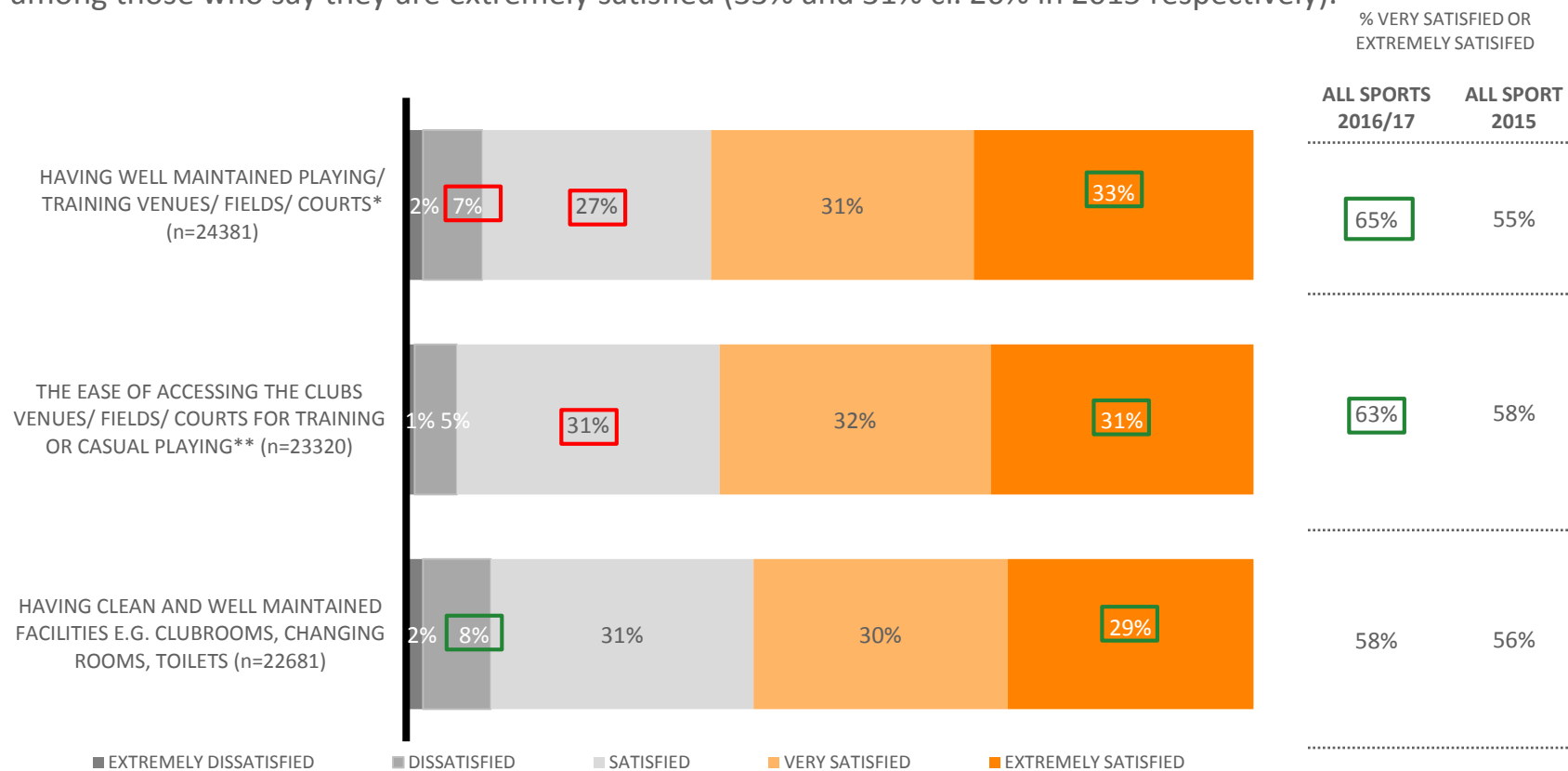


Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)

Q7. Imagine someone is interested in <playing> or participating in <sport >. If they asked you, how likely are you to recommend your/ your child's <club> to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

FACILITIES

Nearly two-thirds are satisfied (very or extremely satisfied) with *having well maintained playing/ training venues/ fields/ courts* (65%) and *the ease of accessing the clubs venues/ fields/ courts for training or casual playing* (63%), which is *significantly higher* than the average for all sports in 2015. This is particularly evident among those who say they are extremely satisfied (33% and 31% cf. 26% in 2015 respectively).



Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable) Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

*[Sport F] Having well maintained course conditions/ [Sport E] Having well maintained club participant s and launch facilities

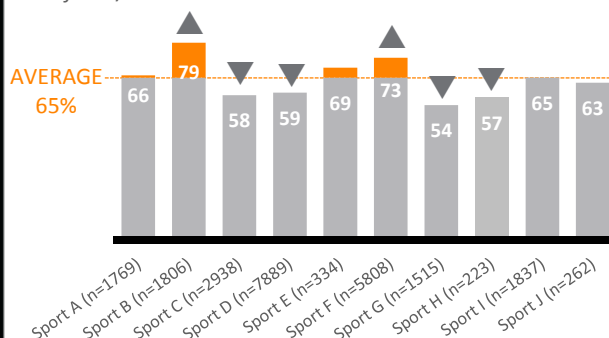
**[Sport F] The ease of booking tee times and accessing the Sport F course/ [Sport E] The ease of accessing cub participant s and launch facilities for training or casual flying

  Significantly higher/lower than All Sports 2015

FACILITIES

HAVING WELL MAINTAINED PLAYING/ TRAINING VENUES/ FIELDS/ COURTS*

Compared with the average of **65%**, Sport B (79%) and Sport F (73%) players are significantly more likely to be very or extremely satisfied with their clubs having well *having well maintained playing/ training venues/ fields/ courts*.



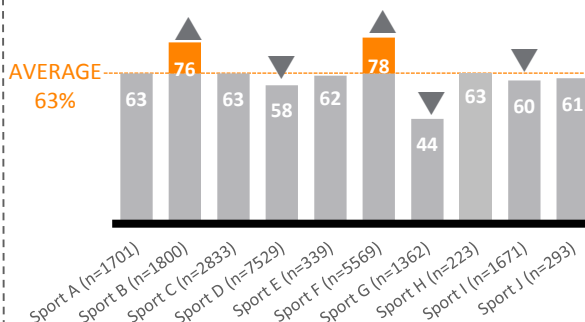
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Members for more than 10 years (68% cf. 65% total)
- Members who belong to *have fun* (71%) or *learn and improve skills* (69%)
- Those who play or train *once a week* (66%)
- Very likely to rejoin next season (72%) and have not complained in the past 3 months (67%)
- Those aged 55-64 (70%) or 65+ (77%)
- President or another office holder (73%)
- Players that have not played for the top team or at representative level in their sport (65%)

THE EASE OF ACCESSING THE CLUBS VENUES/ FIELDS/ COURTS FOR TRAINING OR CASUAL PLAYING**

63% of players are very or extremely satisfied with ease of access for training or casual playing. Sport F (78%) and Sport B (76%) members are *significantly more* likely to be satisfied with the ease of access.



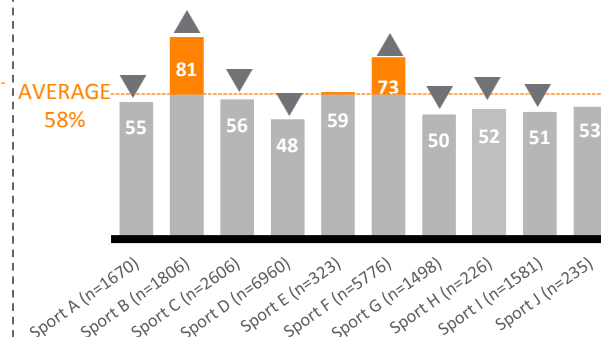
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (66% cf. 56% parents of players)
- Members for more than 10 years (69% cf. 63% total)
- Members who belong to *have fun* (67%)
- Those who play or train *four or more times a week* (68%)
- Very likely to rejoin next season (72%) and have not complained in the past 3 months (65%)
- Male (65% cf. 59% female)
- Those aged 55-64 (70%) or 65+ (74%)
- Committee members (73%), an official/ referee/ umpire/ judge (69%) and/or President or another office holder (71%)
- Players who have played for the top team at the club (66%) and/or represented their club at a regional event/ competition (67%)

HAVING CLEAN AND WELL MAINTAINED FACILITIES E.G. CLUBROOMS, CHANGING ROOMS, TOILETS

58% of players are very or extremely satisfied with their club having clean and well maintained facilities.



SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (62% cf. 48% parent of player)
- Members for more than 10 years (65% cf. 58% total)
- Members who belong to *socialise* (62%), *have fun* (62%) or *have access to facilities and playing fields/ venues/ courts* (63%)
- Very likely to rejoin next season (66%) and have not complained in the past 3 months (60%)
- Male (60% cf. 55% female)
- Those aged 55-64 (66%) or 65+ (75%)
- An official/ referee/ umpire/ judge (65%) and/or President or another office holder (70%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)

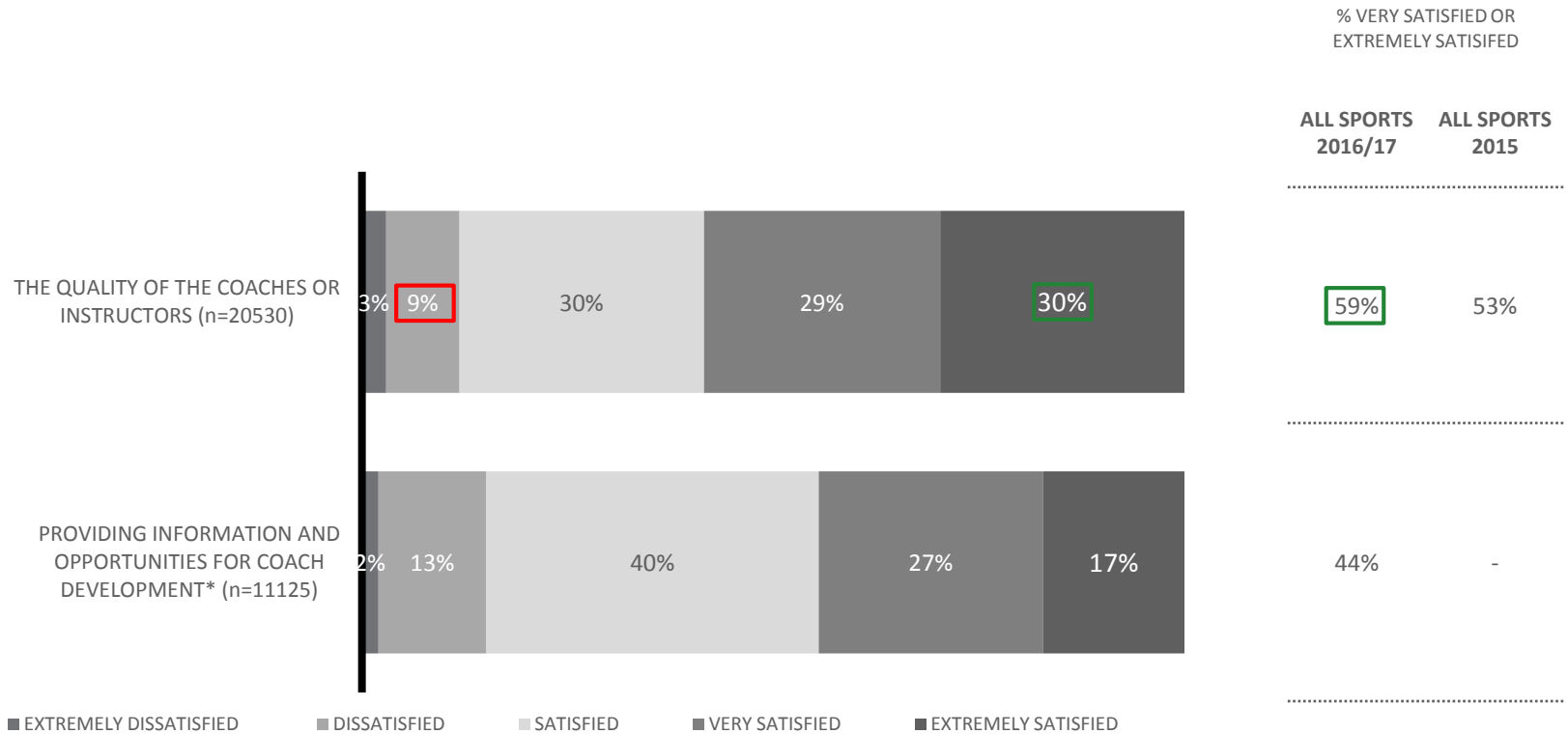
Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

*[Sport F] Having well maintained course conditions/ [Sport E] Having well maintained club participant s and launch facilities

**[Sport F] The ease of booking tee times and accessing the Sport F course/ [Sport E] The ease of accessing cub participant s and launch facilities for training or casual flying

COACHING

Compared with the average for all sports in 2015, *significantly more* are extremely satisfied with *the quality of coaches or instructors* (30% cf. 25%). More than two in five (44%) are very or extremely satisfied with their club *providing information and opportunities for coach development*.



Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable) Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

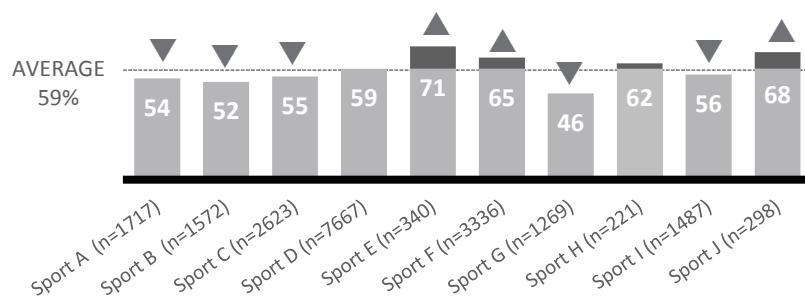
* [Sport F] Providing information and opportunities to volunteer as a coach, official or course rater

 Significantly higher/lower than All Sports 2015

COACHING

THE QUALITY OF THE COACHES OR INSTRUCTORS

59% of members are very or extremely satisfied with the quality of the coaches or instructors. Sport E (71%), Sport J (68%), Sport F (65%) members are *significantly more* likely to be satisfied with the quality of coaching.



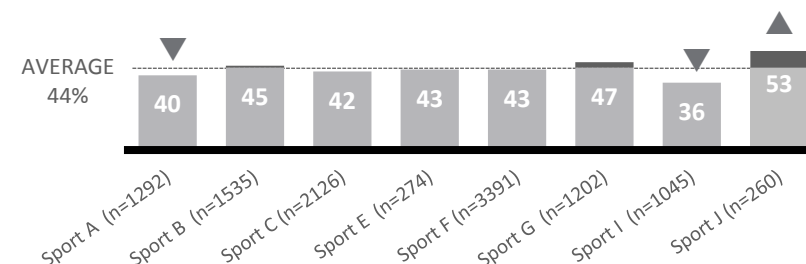
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (60% cf. 56% parents of players)
- Members for less than one year (63% cf. 59% total) or 1-2 years (63%)
- Members who belong to *have access to facilities and playing fields/venues/courts* (65%) or *learn/improve skills* (62%)
- Those who play or train *four or more times a week* (63%)
- Very likely to rejoin next season (69%) and have not complained in the past 3 months (62%)
- Those aged 55-64 (64%)
- Those who are European (60%) and/or Māori (65%)
- Committee members (64%)

PROVIDING INFORMATION AND OPPORTUNITIES FOR COACH DEVELOPMENT*

Compared with the total of **44%**, Sport J (53%) are *significantly more* likely to indicate that they are very or extremely satisfied with their club in providing information and opportunities for coach development.



SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (46% cf. 40% parents of players)
- Members for 1-2 years (49% cf. 44% total)
- Very likely to rejoin next season (52%) and have not complained in the past 3 months (47%)
- Females (46% cf. 43% male)
- Those aged 16-24 (50%)
- Coach or instructor (51%), committee member (49%), an official/ referee/ umpire/ judge (49%)
- Players who have represented their club at a regional event/ competition (48%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)

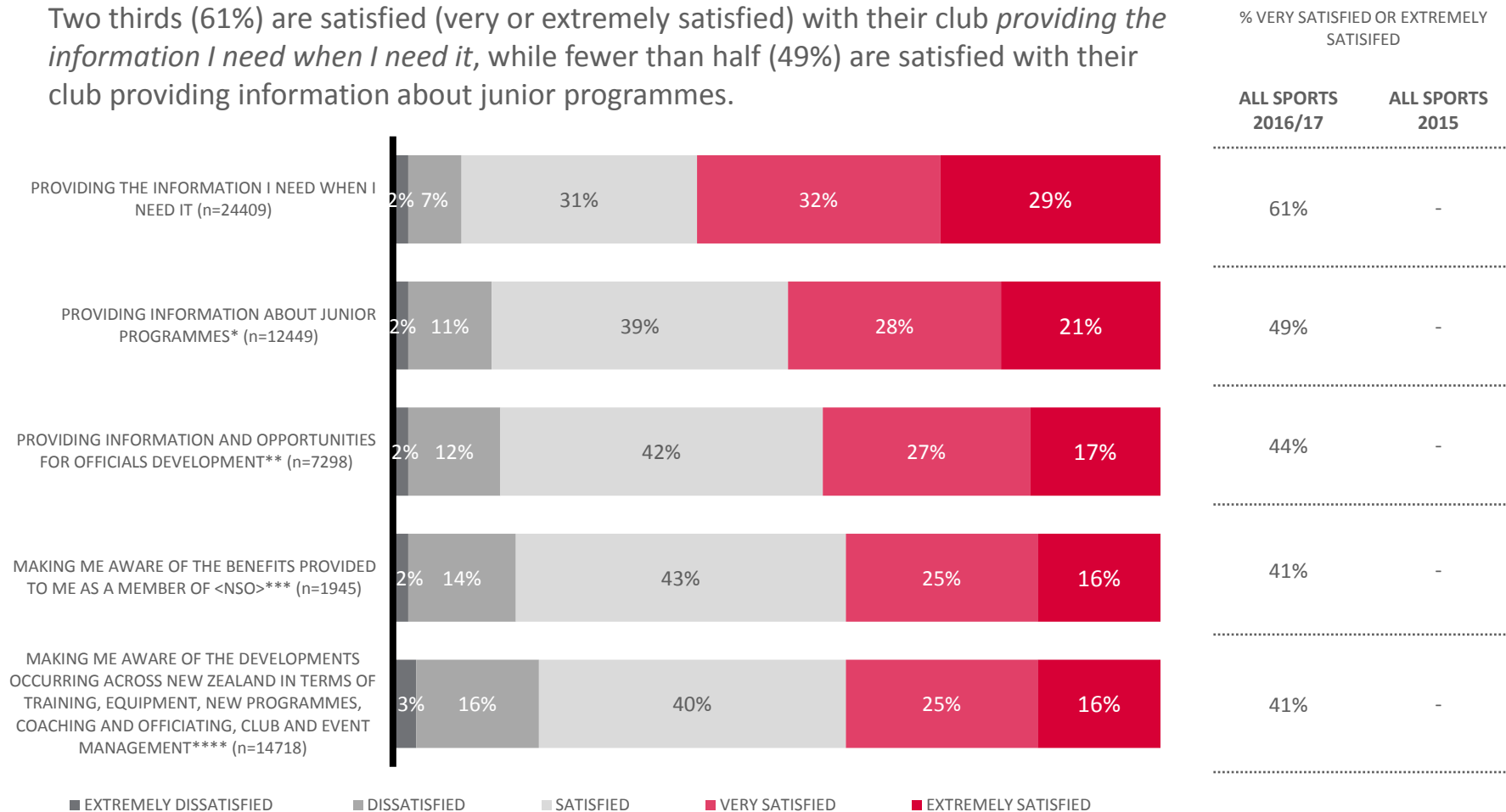
Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

* [Sport F] Providing information and opportunities to volunteer as a coach, official or course rater; Note: this was not asked of Sport D or Sport H

▲▼ Significantly higher/lower than total

COMMUNICATION

Two thirds (61%) are satisfied (very or extremely satisfied) with their club *providing the information I need when I need it*, while fewer than half (49%) are satisfied with their club providing information about junior programmes.



Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)

Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

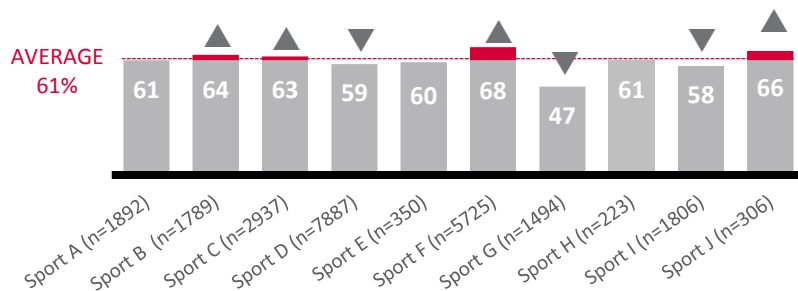
*[Sport F] Providing information about junior programmes or adult coaching

* Not asked of Sport D or Sport H; ** Not asked of Sport E, Sport F, Sport D or Sport H; ***Asked only of Sport A and Sport E; ****Not asked of Sport G or Sport F

COMMUNICATION

PROVIDING THE INFORMATION I NEED WHEN I NEED IT

Two thirds (61%) indicate they are very or extremely satisfied with their club *providing the information they need when they need it*. Sport G is *significantly less likely* to indicate they are satisfied (47%).



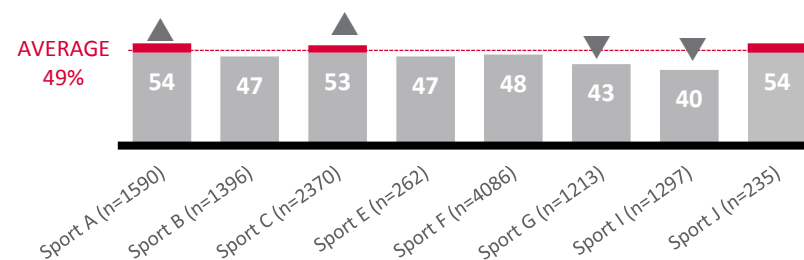
SUB-GROUP DIFFERENCES

Those *significantly more likely* to be very or extremely satisfied are:

- Players (63% cf. 57% parents of players)
- Members for more than 10 years (66% cf. 61% total)
- Members who belong to *have fun* (65%)
- Those who play or train *four or more times a week* (65%)
- Very likely to rejoin next season (71%) and have not complained in the past 3 months (64%)
- Male (62% cf. 59% female)
- Those aged 55-64 (66%) or 65+ (68%)
- Committee members (67%) and/or President or another office holder (72%)
- Players who have played for the top team at their club (64%) and/or represented their club at a regional event/ competition (64%)

PROVIDING INFORMATION ABOUT JUNIOR PROGRAMMES*

The level of satisfaction (very or extremely satisfied) with clubs *providing information about junior programmes* is fairly consistent across the eight sports that were asked this question, ranging from 40% to 54% indicating they are very or extremely satisfied.



SUB-GROUP DIFFERENCES

Those *significantly more likely* to be very or extremely satisfied are:

- Members for 1 -2 years (52% cf. 49% total)
- Those who play or train *four or more times a week* (52%)
- Very likely to rejoin next season (57%) and have not complained in the past 3 months (51%)
- Those aged 16-24 (54%)
- Committee members (54%) and/or President or another office holder (54%)
- Players who have played for the top team at their club (51%) and/or represented their club at a regional event/ competition (52%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

*[Sport F] Providing information about junior programmes or adult coaching

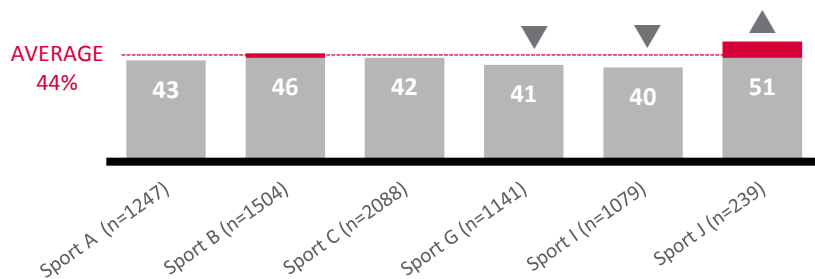
* Not asked of Sport D or Sport H

▲▼ Significantly higher/lower than Total

COMMUNICATION

PROVIDING INFORMATION AND OPPORTUNITIES FOR OFFICIALS DEVELOPMENT**

Sport J members are *significantly more* likely to indicate they are very or extremely satisfied with their club *providing information and opportunities for officials development* (51%), while Sport G (41%) and Sport I (40%) are *significantly less* likely to indicate they are very or extremely satisfied.



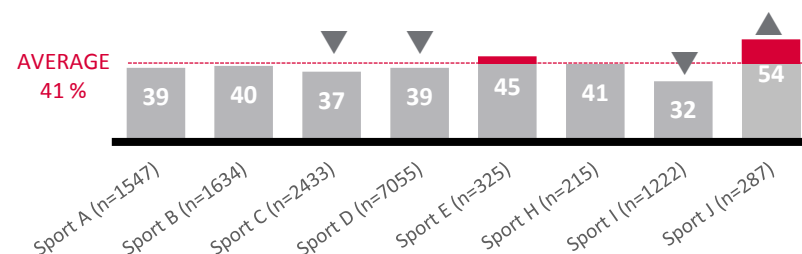
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (46% cf. 41% parents of players)
- Those who play or train *four or more times a week* (50% cf. 44% total)
- Very likely to rejoin next season (53%) and have not complained in the past 3 months (47%)
- Those aged 16-24 (49%) or 55-64 (52%)
- Official/ referee/ umpire/ judge (51%)
- Players who have played for the top team at their club (47%), represented their club at a regional event/ competition (48%) and/or region at a national event/ competition (49%)

MAKING ME AWARE OF THE DEVELOPMENTS OCCURRING IN THE SPORT ACROSS NEW ZEALAND IN TERMS OF TRAINING, EQUIPMENT, NEW PROGRAMMES, COACHING AND OFFICIATING, CLUB AND EVENT MANAGEMENT****

On average two in five (41%) are very or extremely satisfied with their club *making me aware of the developments* in their sport, with Sport J *significantly more* likely to indicate they are very or extremely satisfied (54%).



SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (43% cf. 38% parents of players)
- Member who belong to *get fit and healthy* (47% cf. 41% total)
- Those who play or train *four or more times a week* (45%)
- Very likely to rejoin next season (49%) and have not complained in the past 3 months (44%)
- Female (44% cf. 40% male)
- Those aged 16-24 (46%)
- Committee member (47%) and/or President or another office holder (48%)
- Players who have represented their club at a regional event/ competition (44%), region at a national event/ competition (45%) and/or New Zealand at an international event/ competition (52%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

** Not asked of Sport E, Sport F, Sport D or Sport H

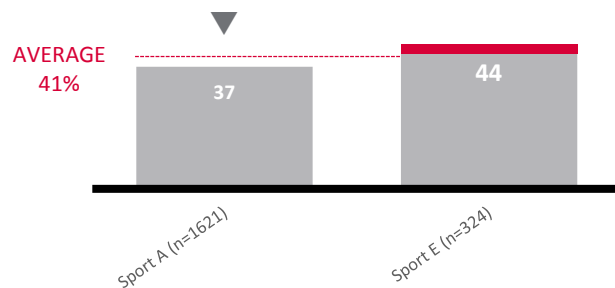
****Not asked of Sport G or Sport F

▲▼ Significantly higher/lower than Total

COMMUNICATION

MAKING ME AWARE OF THE BENEFITS PROVIDED TO ME AS A MEMBER OF NSO***

Benefits provided to members of Sport E and Sport A clubs are not widely known with around two in five indicating that they are very or extremely satisfied with their club on *making me aware of the benefits provided as a member* of the sport.



SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

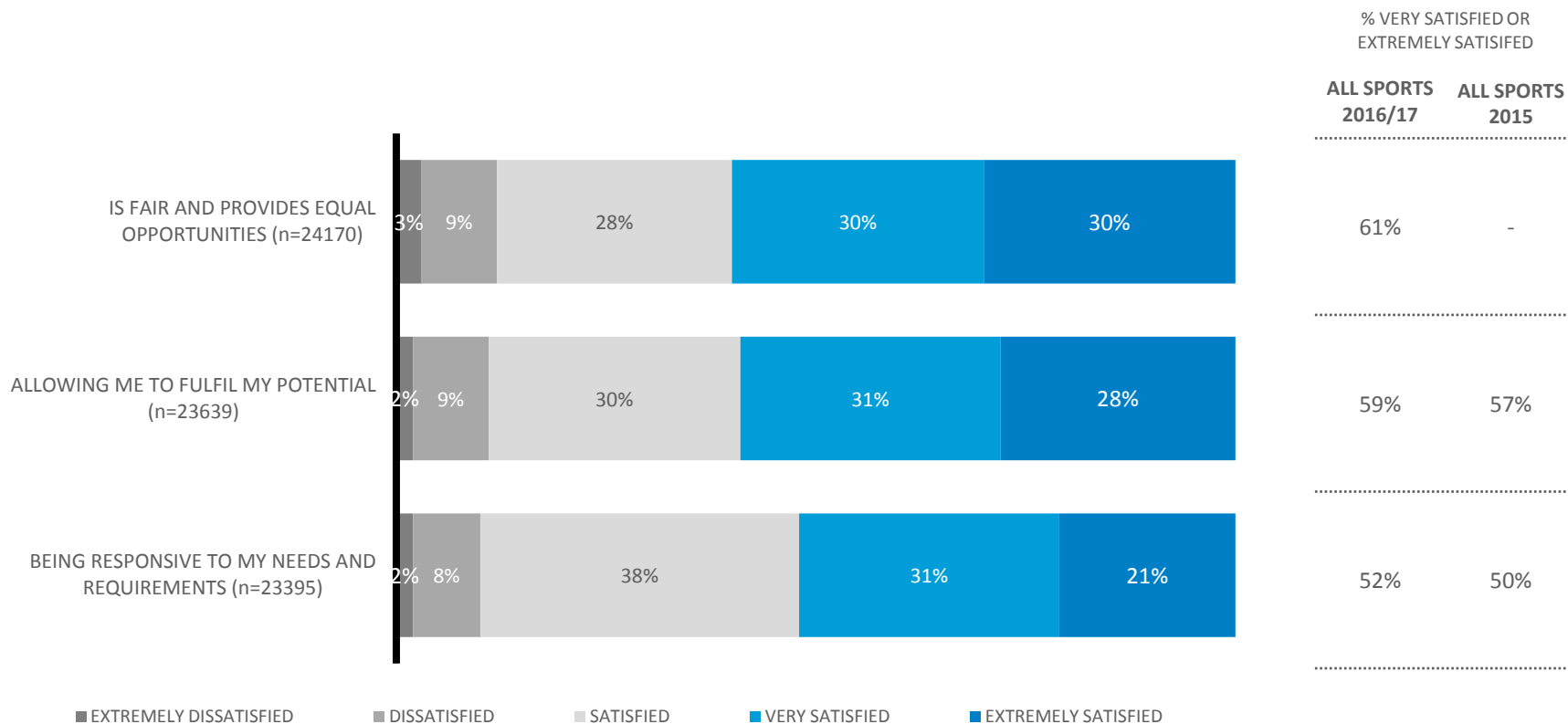
- Players (44% cf. 43% parents of players)
- Very likely to rejoin next season (50% cf. 41% total) and have not complained in the past 3 months (43%)
- Those aged 65+ (49%)
- Coach or instructor (53%), Committee member (56%) and/or Official/ referee/ umpire/ judge (61%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
Q10a/Q10b. How would you rate your/ your child's overall satisfaction with your/ their <sport> <club> on each of the following...

***Asked only of Sport A and Sport E

FULFILLING POTENTIAL

More than half of members are very or extremely satisfied with the aspects associated with fulfilling potential, ranging from 52% to 61%. Members are most satisfied (very or extremely satisfied) that the club *is fair and provides equal opportunities* (61%), followed by the club *allowing me to fulfil potential* (59%) and *being responsive to my needs and requirements* (52%). These results are similar to the average for all sports in 2015.

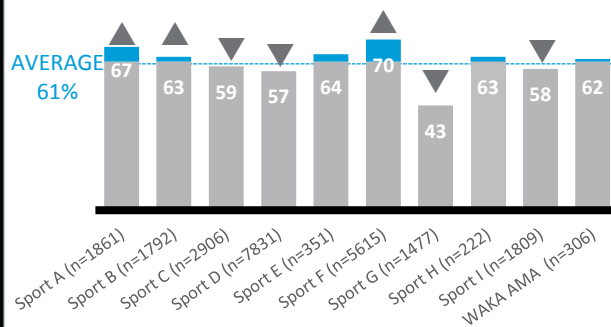


Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
 Q10a/Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> <club> on each of the following...

FULFILLING POTENTIAL

IS FAIR AND PROVIDES EQUAL OPPORTUNITIES

Satisfaction (very or extremely satisfied) with their club being *fair and provides equal opportunities* is significantly higher for Sport F (70%), Sport A (67%), and Sport B (63%) members.



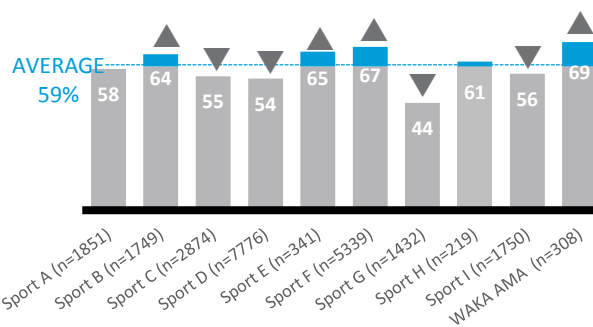
SUB-GROUP DIFFERENCES

Those significantly more likely to be very or extremely satisfied are:

- Players (63% cf. 56% parents of players)
- Members for less than 1 year (63% cf. 61% total) or more than 10 years (65%)
- Members who belong to *have fun* (65%)
- Those who play or train *four or more times a week* (63%)
- Very likely to rejoin next season (72%) and have not complained in the past 3 months (64%)
- Male (63% cf. 57% female)
- Those aged 55-64 (66%) or 65+ (68%)
- Coach or instructor (65%), Committee members (72%) and/or President or another office holder (74%)
- Players who have played for the top team at their club (64%), represented their club at a regional event/competition (65%) and/or region at a national event/competition (65%)

ALLOWING ME TO FULFIL MY POTENTIAL

Compared with the average of 59%, Sport J (69%), Sport F (67%), Sport E (65%), Sport B (64%) members are significantly more likely to be very or extremely satisfied with their club *allowing me to fulfil my potential*.



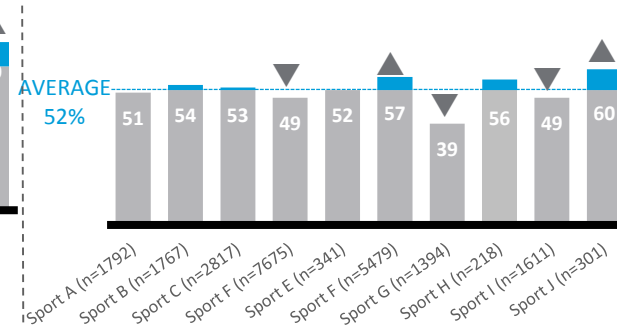
SUB-GROUP DIFFERENCES

Those significantly more likely to be very or extremely satisfied are:

- Players (62% cf. 53% parents of players)
- Members for more than 10 years (66% cf. 59% total)
- Members who belong to *have fun* (62%)
- Those who play or train *four or more times a week* (66%)
- Very likely to rejoin next season (72%) and have not complained in the past 3 months (62%)
- Male (61% cf. 57% female)
- Those aged 55-64 (69%) or 65+ (68%)
- Coach or instructor (66%), Committee members (72%) and/or President or another office holder (73%)
- Players who have played for the top team at their club (63%), represented their club at a regional event/competition (66%), region at a national event/competition (68%) and/or New Zealand at an international event/competition (72%)

BEING RESPONSIVE TO MY NEEDS AND REQUIREMENTS

Sport F (57%) and Sport J (60%) members are significantly more likely to be very or extremely satisfied with their club when it comes to *being responsive to my needs and requirements*.



SUB-GROUP DIFFERENCES

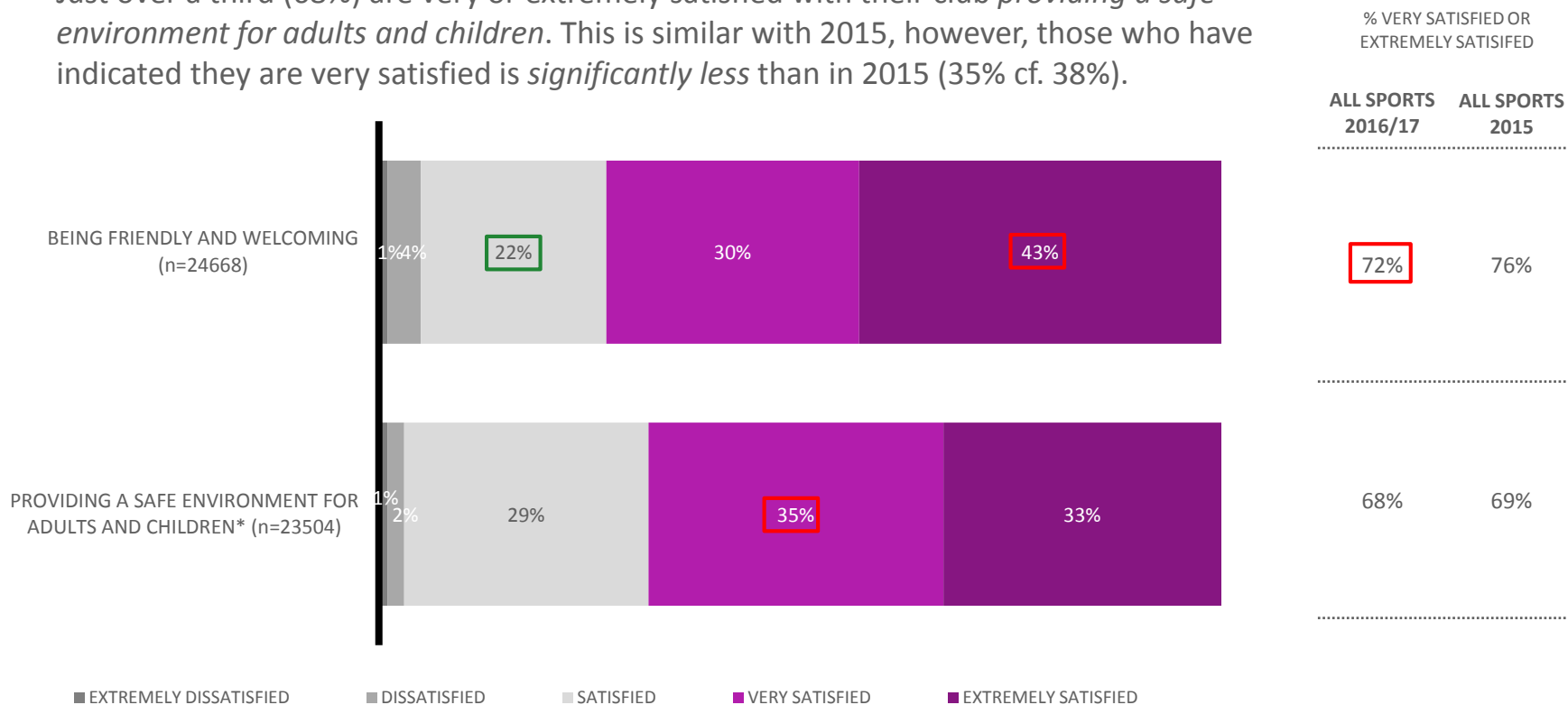
Those significantly more likely to be very or extremely satisfied are:

- Players (55% cf. 46% parents of players)
- Members for more than 10 years (55% cf. 52% total)
- Members who belong to *have fun* (55%)
- Those who play or train *four or more times a week* (55%)
- Very likely to rejoin next season (63%) and have not complained in the past 3 months (56%)
- Those aged 16-24 (57%) or 65+ (56%)
- Committee members (62%) and/or President or another office holder (64%)
- Players who have played for the top team at their club (55%), represented their club at a regional event/competition (55%), region at a national event/competition (57%)

FRIENDLY AND WELCOMING

Almost three quarters (72%) of players are very or extremely satisfied their club is *being friendly and welcoming* which is *significantly less* than the average for all sports in 2015. In particular, those who indicated they are *extremely satisfied* is *significantly less* than in 2015 (43% cf. 47%).

Just over a third (68%) are very or extremely satisfied with their club *providing a safe environment for adults and children*. This is similar with 2015, however, those who have indicated they are very satisfied is *significantly less* than in 2015 (35% cf. 38%).



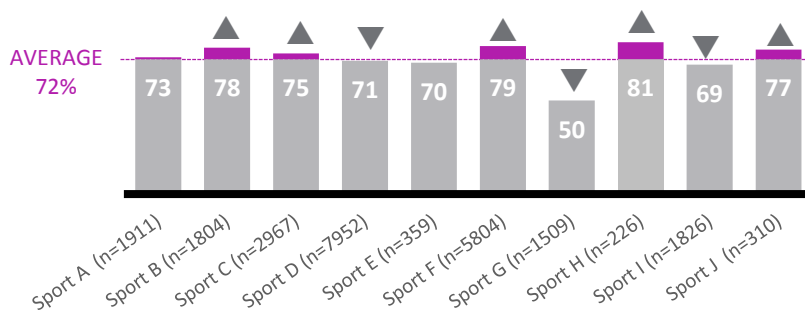
Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
 Q10a/Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> <club> on each of the following...
 *[Sport F] Providing a family friendly environment for adults and children

 Significantly higher/lower than All Sports 2015

FRIENDLY AND WELCOMING

BEING FRIENDLY AND WELCOMING

All sports rate similarly when it comes to the level of satisfaction (very or extremely satisfied) with their club being *friendly and welcoming* ranging from 69% to 81% with the exception of Sport G which is *significantly less* likely to be very or extremely satisfied (50%).



SUB-GROUP DIFFERENCES

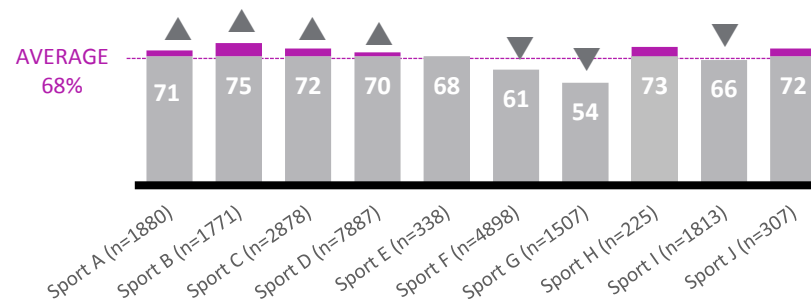
Those *significantly more* likely to be very or extremely satisfied are:

- Players (75% cf. 66% parents of players)
- Members for more than 10 years (76% cf. 72% total)
- Members who belong to *socialise* (77%)
- Those who play or train *four or more times a week* (75%)
- Very likely to rejoin next season (83%) and have not complained in the past 3 months (75%)
- Male (75% cf. 68% female)
- Those aged 55-64 (77%) or 65+ (78%)
- Committee members (82%) and/or President or another office holder (81%)
- Players who have played for the top team at their club (79%) and/or represented their club at a regional event/ competition (76%)

PROVIDING A SAFE ENVIRONMENT FOR ADULTS AND CHILDREN*

Sport I (66%), Sport F (61%), and Sport G (54%) members are *significantly less* likely to indicate that the club is *providing a safe environment for adults and children*.

Sport B (75%), Sport C (72%), and Sport A (71%) members are *significantly more* likely to indicate they are very or extremely satisfied with this aspect.



SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (69% cf. 66% parents of players)
- Those who play or train *four or five times a week* (71% cf. 68% total)
- Very likely to rejoin next season (78%) and have not complained in the past 3 months (71%)
- Male (70% cf. 66% female)
- Committee members (77%), Official/ referee/ umpire/ judge (73%) and/or President or another office holder (77%)
- Players who have played for the top team at their club (73%), represented their club at a regional event/ competition (73%) and/or region at a national event/ competition (72%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
Q10a/Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> <club> on each of the following...

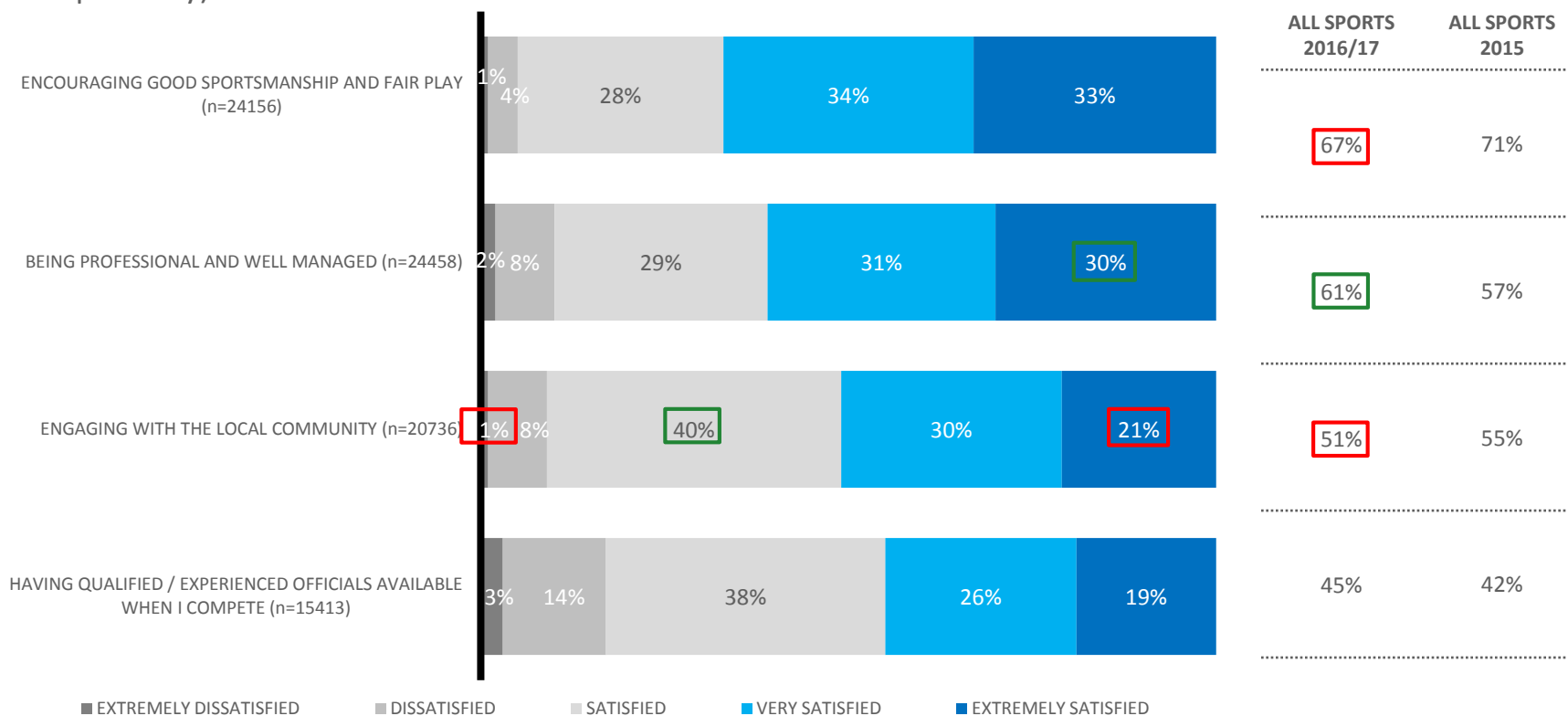
*[Sport F] Providing a family friendly environment for adults and children

▲ ▼ Significantly higher/lower than Total

PROFESSIONAL AND WELL MANAGED

Compared with the average for all sports in 2015, *significantly fewer* indicated they are very or extremely satisfied with *encouraging good sportsmanship and fair play* (67% cf. 71%) and *engaging with the local community* (51% cf. 55%).

Significantly more are very or extremely satisfied (61%), in particular extremely satisfied (30%), with *being professional and well managed* compared with 2015 (57% and 26% respectively).



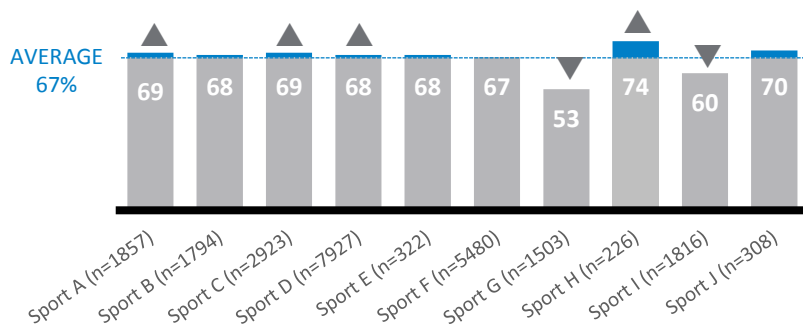
Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
 Q10a/Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their <club> on each of the following...
 *Not asked of Sport F

 Significantly higher/lower than All Sports 2015

PROFESSIONAL AND WELL MANAGED

ENCOURAGING GOOD SPORTSMANSHIP AND FAIR PLAY

Members of Sport H (74%), Sport A (69%), Sport C (69%) and Sport D (68%) clubs are *significantly more* likely to indicate they are very or extremely satisfied with their club *encouraging good sportsmanship and fair play*.



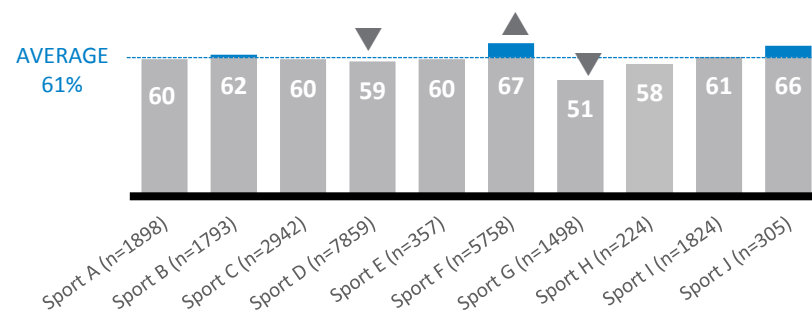
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (68% cf. 64% parents of players)
- Members for more than 10 years (70% cf. 67% total)
- Those who play or train *four or more times a week* (70%)
- Very likely to rejoin next season (77%) and have not complained in the past 3 months (70%)
- Male (68% cf. 64% female)
- Those aged 65+ (69%)
- Committee members (76%), Official/ referee/ umpire/ judge (71%) and/or President or another office holder (75%)
- Players who have played for the top team at their club (71%), represented their club at a regional event/ competition (70%) and/or region at a national event/ competition (70%)

BEING PROFESSIONAL AND WELL MANAGED

Sport F members are *significantly more* likely to indicate they are very or extremely satisfied with their club *being professional and well managed* (67%) while Sport D (59%) and Sport G Centre members are *significantly less* likely to be satisfied (51%).



SUB-GROUP DIFFERENCES

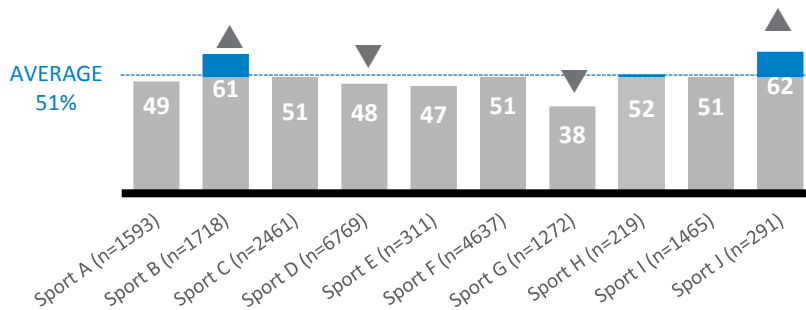
Those *significantly more* likely to be very or extremely satisfied are:

- Member who belong to *have fun* (63% cf. 61% total)
- Those who play or train *four or more times a week* (63%)
- Very likely to rejoin next season (72%) and have not complained in the past 3 months (65%)
- Those aged 65+ (66%)
- Committee members (65%) and/or President or another office holder (68%)
- Players who have represented their club at a regional event/ competition (63%)

PROFESSIONAL AND WELL MANAGED

ENGAGING WITH THE LOCAL COMMUNITY

Half (51%) are very or extremely satisfied with their club on *engaging with the local community*, with Sport J (62%) and Sport B (61%) members are significantly more likely to indicate they are very or extremely satisfied.



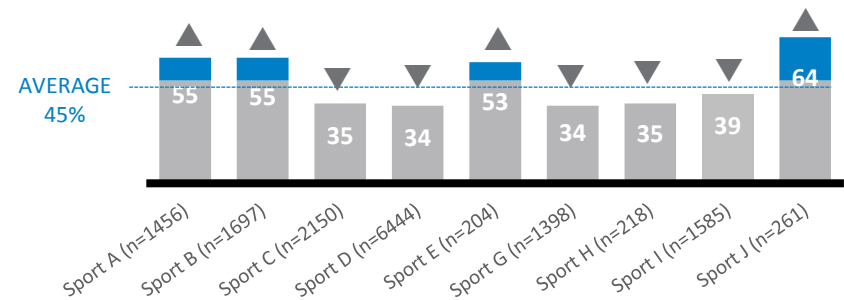
SUB-GROUP DIFFERENCES

Those significantly more likely to be very or extremely satisfied are:

- Players (53% cf. 46% parents of players)
- Very likely to rejoin next season (60% cf. 51% total) and have not complained in the past 3 months (54%)
- Those aged 55-64 (58%) or 65+ (55%)
- Committee members (61%) and/or President or another office holder (59%)
- Players who have represented their club at a regional event/ competition (54%) and/or New Zealand at an international event/ competition (63%)

HAVING QUALIFIED / EXPERIENCED OFFICIALS AVAILABLE*

Less than half (45%) are very or extremely satisfied with *having qualified/experienced officials available when they compete* which is the lowest rated aspect of this group of drivers.



SUB-GROUP DIFFERENCES

Those significantly more likely to be very or extremely satisfied are:

- Players (48% cf. 39% parents of players)
- Those who play or train *four or more times a week* (52% cf. 45% total)
- Very likely to rejoin next season (54%) and have not complained in the past 3 months (48%)
- Those aged 55-64 (56%) or 65+ (57%)
- Committee members (51%), Official/ referee/ umpire/ judge (50%) and/or President or another office holder (52%)
- Players who have represented their club at a regional event/ competition (52%), region at a national event/ competition (51%) and/or New Zealand at an international event/ competition (59%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)

Q10a/Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> <club> on each of the following...

*Not asked of Sport F

▲ ▼ Significantly higher/lower than Total

SOCIAL ENVIRONMENT

The aspects of a good social environment, *social environment at the club* (63%) and *fostering a sense of pride in the club* (61%), are both rated *significantly lower* than the average for all sports in 2015 (67% and 65%, respectively). In particular, *significantly fewer* members indicated that they are extremely satisfied with the *social environment at the club* compared with 2015 (31% cf. 34%).



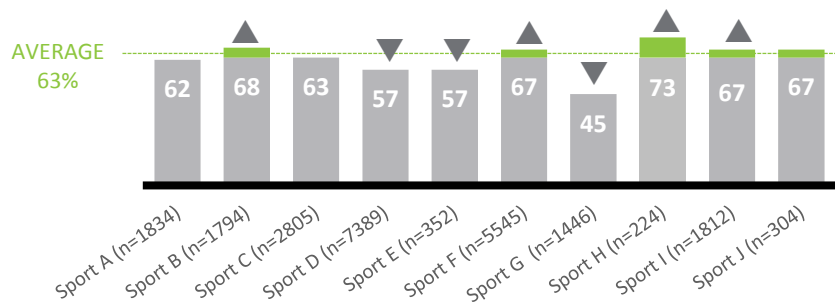
Base: Respondents who are members or play casually at a club (Excluding Don't know/not applicable)
 Q10a/Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> <club> on each of the following...

Significantly higher/lower than All Sports 2015

SOCIAL ENVIRONMENT

THE SOCIAL ENVIRONMENT AT THE CLUB

Sport H (73%), Sport B (68%), Sport F (67%), and Sport I (67%) members are *significantly more* likely to indicate they are very or extremely satisfied with the *social environment at the club*.



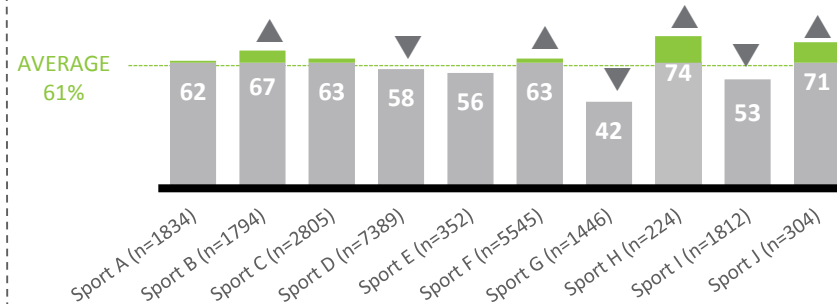
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (65% cf. 57% parents of players)
- Members for more than 10 years (65% cf. 63% total)
- Members who belong to *socialise* (70%), *have fun* (67%)
- Very likely to rejoin next season (73%) and have not complained in the past 3 months (65%)
- Male (64% cf. 60% female)
- Those aged 16-24 (69%) or 65+ (67%)
- Committee members (69%) and/or President or another office holder (70%)
- Players who have played for the top team at their club (67%) and/or represented their club at a regional event/ competition (66%)

FOSTERING A SENSE OF PRIDE IN OUR CLUB

Sport H (74%), Sport J (71%), Sport B (67%) and Sport F (63%) members are *significantly more* likely to indicate they are very or extremely satisfied with the club *fostering a sense of pride*.



SUB-GROUP DIFFERENCES

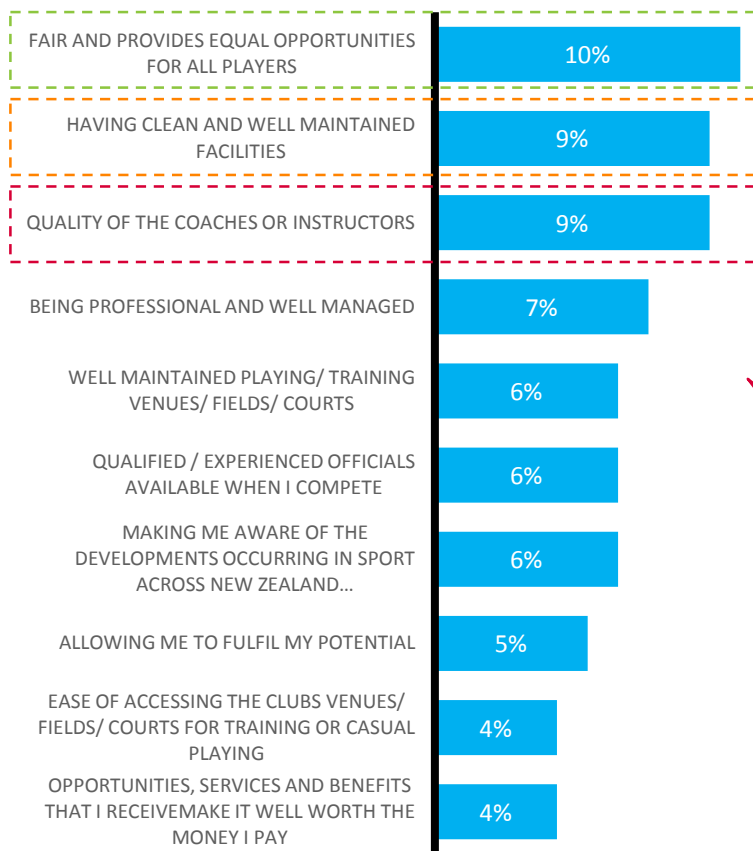
Those *significantly more* likely to be very or extremely satisfied are:

- Players (64% cf. 55% parents of players)
- Members for more than 10 years (65% cf. 61% total)
- Those who play or train *four or more times a week* (65%)
- Very likely to rejoin next season (72%) and have not complained in the past 3 months (64%)
- Male (62% cf. 59% female)
- Those aged 16-24 (65%), 55-64 (66%) or 65+ (65%)
- Coach or instructor (65%), Committee members (73%) and/or President or another office holder (73%)
- Players who have played for the top team at their club (67%), represented their club at a regional event/ competition (66%) and/or region at a national event/ competition (68%)

MEMBERS ARE LEAST SATISFIED WITH THE LEVEL OF FAIRNESS AND EQUAL OPPORTUNITIES

Of the areas members are least satisfied (dissatisfied or extremely dissatisfied), one in ten (10%) indicated that the area they are **least** satisfied with is the level of *fair and equal opportunities provided for all players*. This is closely followed by *having clean and well maintained facilities* (9%) and *quality of coaches or instructors* (9%).

TOP 10 ASPECTS OF LEAST SATISFACTION



WHAT MEMBERS NEED TO BE MORE SATISFIED

Full time coach for women. Dedicated umpires and scorers for women. Equal funding to men. Better representation on boards & committees. (Sport C Player)

Our club is in negotiation with our local council about improving facilities. We are frustrated that we have to get changed in public toilets, have no clubroom or meeting place. This significantly holds back the development of the club. (Sport D Player)

Just need more people who take responsibility for a group rather than having a few coaches doing the job that many should be doing. Need committed leaders to take responsibility of the groups. (Sport H Player)

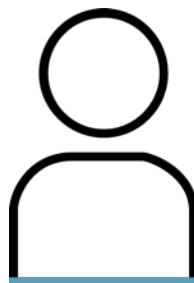
MORE OF WHAT NEEDS TO IMPROVE FOR LOWER RATED ASPECTS

Management should learn to respect and treat equally all members of club no matter the grade one plays. Should conduct team meetings, follow up on matches and events occurring during the play or team gatherings so that we all feel as one team. Management should set some standards and healthy environment by not discriminating which they failed to do so, which gave opportunity for few players to discriminate and humiliate other players yet no action has been taken.
(Sport C player)

Look after the needs of the participants and ensure that facilities are always available when club is playing.
(Sport B player)

Better quality coaches who bring an element of fun and challenge to the programme.
(Sport A parent)

Create pathways for coach development . Access to resources for technical coaching eg GPS, Video, ease of information sharing. Using technology for clear identifiable opportunities for participants to trust and commit to their coach. Access to overseas contacts for training/racing purposes shared across the national organisation and with clubs.
(Sport J participant)



Greens need to be upgraded and maintained to ensure they are of an acceptable standard. Better communication from committee to members.
(Sport F player)

Officials qualified enough to control the games and sometimes the side lines. This person will also help teach/correct player's techniques and understanding of the rules especially at this young age.
(Sport I parent)

The club having sufficient funds/funding and a robust maintenance plan to keep the facilities maintained to a high standard. The ability to attract grants seems to be the biggest problem. The club membership is slowly improving in number due mainly to the quality of the playing surface, but membership is not strong enough to provide sufficient income and the local community is not wealthy enough to provide more than basic sponsorship through our advertising programme.
(Sport F player)

FOCUS OF IMPROVEMENT

Respondents were asked what the **one** aspect they would want to be improved, if membership fees were to increase.

Excluding those who say they would not want anything to improve if it meant their fees were to increase, the service that players would most want to improve would be *player development programmes* (18%). *Playing and training venues, club facilities* and *quality of coaching* are equally rated with one-in-six (16%) indicating this is the one aspect they would like improvement in.



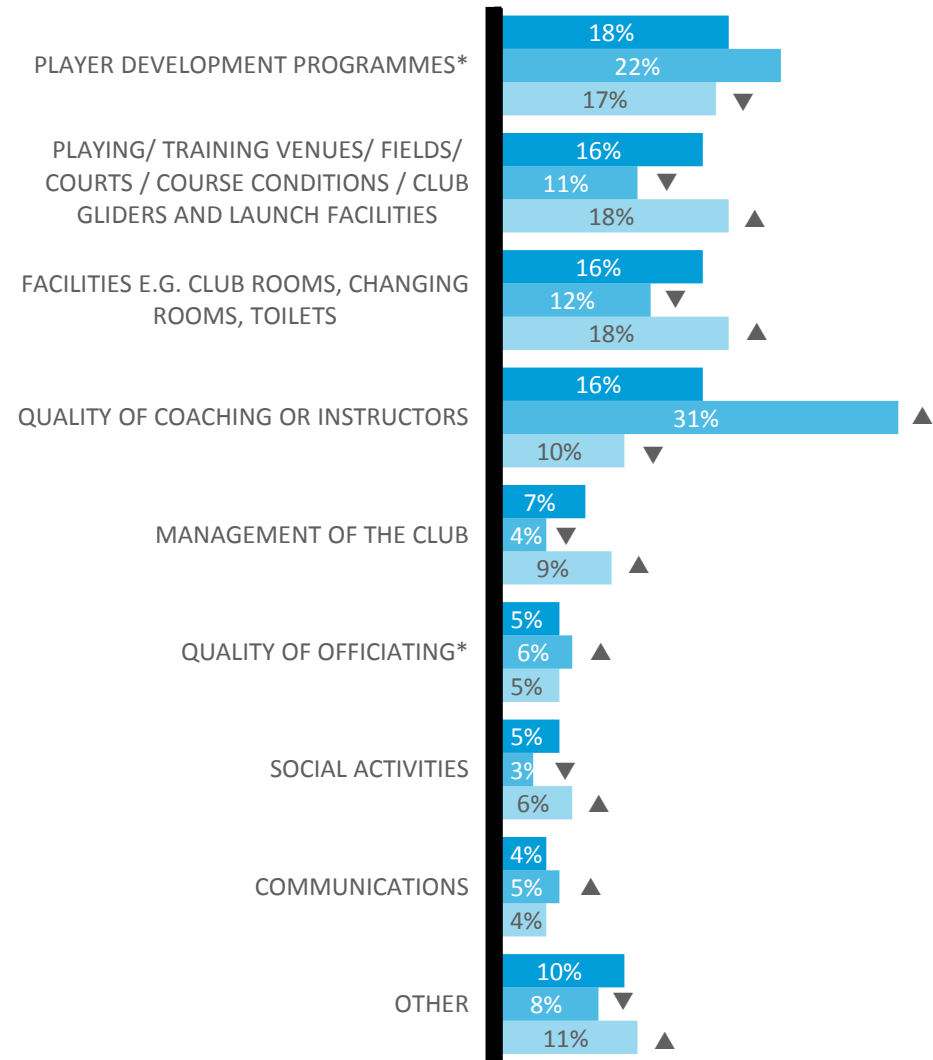
15% would not want anything improved if it meant their fees were increased. Compared with parents, players were significantly more likely to indicate they do not want anything improved if fees were to increase (16% cf. 13%).

Sport F (22%), Sport I (20%), Sport B (17%), and Sport G (17%) are *significantly more* likely to indicate that they don't want to improve anything if it means their fees need to increase.

Base: Respondents who are members or play casually at a club (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=18589)

Q14. Thinking about all the services and benefits of belonging to a <sport> <club>... If your/ your child's <sport> <club> was going to focus on improving one of the following aspects, and the membership fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?

* Not asked of Sport D or Sport H



● TOTAL (n=18589) ● PARENT (n=7980) ● PLAYER (n=10609)

▲ ▼ Significantly higher/lower than Total

FOCUS OF IMPROVEMENT

SUB-GROUP DIFFERENCES

The following groups are *significantly more* likely to indicate they would like these aspects to improve, if fees were to increase:



18%
PLAYER DEVELOPMENT PROGRAMMES*

- Parents of players (22% cf. 17% players)
- Members for less than 5 years (21% cf. 18% total)
- Members who belong to a club *to learn/improve skills* (29%)
- Those who play or train *two or three times a week* (20%)
- Likely to rejoin next season (20%)
- Primary/Intermediate (5-12 years) (22%) and 13-15 years (21%)
- Role at club is player (19%)
- Players who have represented club at a regional event/ competition (23%) and/or region at a national event/ competition (24%)
- Female (23% cf. 16% male)



16%
FACILITIES E.G. CLUB ROOMS, CHANGING ROOMS, TOILETS

- Players (18% cf. 12% parents of players)
- Members for more than 10 years (20% cf. 16% total)
- Members who belong to a club *to socialise* (20%) or *get fit and healthy* (20%)
- Those who play or train *four or more times a week* (18%)
- Likely to rejoin next season (18%)
- Aged 16-24 (19%), 35-44 (20%), 45-54 (25%)
- Role at club is Coach or instructor (20%) and/or Committee member (22%)
- Players who represented region at a national event/ competition (19%) and/or New Zealand at an international event/ competition (26%)
- Female (18% cf. 16% male)



16%
PLAYING/ TRAINING VENUES/ FIELDS/ COURTS

- Players (18% cf. 11% parents of players)
- Members for more than 10 years (21% cf. 16% total)
- Members who belong to a club *to play competitively* (17%) or *have access to facilities and playing fields/ venues/ courts* (27%)
- Those who play or train *less than once a week* (22%) or *6 or more times a week* (27%)
- Likely to rejoin next season (17%)
- Those aged 16-24 (19%), 55-64 (19%), 65+ (19%)
- Male (18% cf. 11% female)

NSOs

SIGNIFICANTLY OVER-INDEX

SIGNIFICANTLY UNDER-INDEX

- Sport B (24%)
- Sport C (29%)
- Sport G (21%)
- Sport I (29%)
- Sport J (33%)

- Sport F (7%)

- Sport J (25%)
- Sport H (33%)

- Sport A (12%)
- Sport B (12%)
- Sport C (13%)
- Sport F (13%)
- Sport G (13%)
- Sport I (8%)

- Sport C (19%)
- Sport D (20%)
- Sport F (21%)
- Sport E (34%)

- Sport A (9%)
- Sport I (8%)
- Sport J (1%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/I don't want to improve anything if it means my feed need to increase) (n=18589)

Q14. Thinking about all the services and benefits of belonging to a <sport> <club>... If your/ your child's <sport> <club> was going to focus on improving one of the following aspects, and the membership fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?

*Not asked of Sport D or Sport H

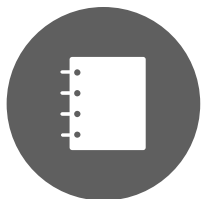
Note: Only top six aspects for improvement are illustrated

FOCUS OF IMPROVEMENT

NSOs

SUB-GROUP DIFFERENCES

The following groups are *significantly more* likely to indicate they would like these aspects to improve, if fees were to increase:



16%

QUALITY OF COACHING OR INSTRUCTORS

- Parents of players (31% cf. 10% players)
- Members for less than 5 years (19% cf. 16% total)
- Members who belong to *play competitively* (19%) or *learn/improve skills* (21%)
- Those who play or train *once a week or less* (20%) or *two or three times a week* (17%)
- Unlikely to rejoin next season (25%)
- Primary/Intermediate (5-12 years) (31%) and 13-15 years (27%)
- Role at club is player (17%)
- Player who have played for the top team at the club (19%)



7%

MANAGEMENT OF THE CLUB

- Players (9% cf. 4% parents of players)
- Members for more than 5 years (9% cf. 7% total)
- Those who play or train *four or more times a week* (8%)
- Unlikely to rejoin next season (13%)
- Those aged 25-34 (10%), 65+ (12%)
- Role at club is paid employee (16%)
- Players who have played for the top team at the club (8%)
- Male (8% cf. 6% female)



5%

QUALITY OF OFFICIATING*

- Parents of players (6% cf. 5% players)
- Members for less than 5 years (6% cf. 5% total)
- Members who belong to a club to *have fun* (7%)
- Those who play or train *once a week* (9%)
- Primary/Intermediate (5-12 years) (6%), 16-24 (8%), 25-34 (8%), 35-44 (9%)
- Role at club is manager (10%), official/ referee/ umpire/ judge (8%) and/or paid employee (13%)
- Female (8% cf. 4% male)

SIGNIFICANTLY OVER-INDEX

SIGNIFICANTLY UNDER-INDEX

- Sport A (34%)
- Sport C (19%)
- Sport D (38%)

- Sport B (7%)
- Sport E (6%)
- Sport F (2%)
- Sport G (12%)
- Sport I (14%)

- Sport B (15%)
- Sport H (12%)

- Sport A (6%)
- Sport C (4%)
- Sport G (4%)
- Sport I (3%)

- Sport G (19%)
- Sport I (22%)

- Sport A (2%)
- Sport B (2%)
- Sport F (1%)

Base: Respondents who are members or play casually at a club (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=18589)

Q14. Thinking about all the services and benefits of belonging to a <sport> <club>... If your/ your child's <sport> <club> was going to focus on improving one of the following aspects, and the membership fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?

*Not asked of Sport D or Sport H

Note: Only top six aspects for improvement are illustrated

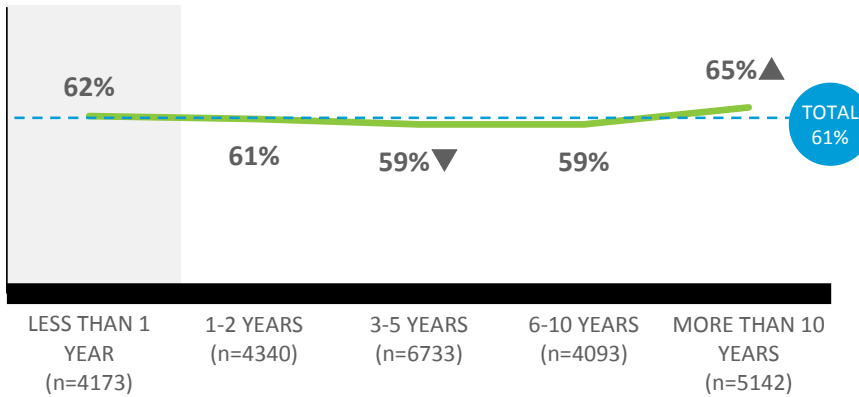
An abstract graphic on the left side of the slide. It features a vertical black bar on the far left. From this bar, a series of curved, overlapping lines in various colors (blue, green, yellow, orange, red, purple) fan out to the right, forming a funnel-like shape. Several colored dots (yellow, green, purple, red) are placed at various points along these lines, with thin lines extending from them towards the right edge of the slide.

LENGTH OF MEMBERSHIP & THE JOINING PROCESS

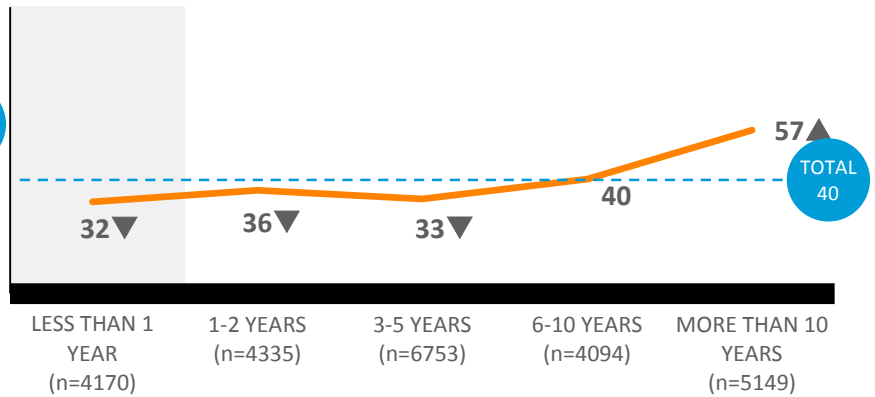
KEY METRICS BY LENGTH OF MEMBERSHIP

All key metrics are *significantly higher* for those who have been members of their club for more than 10 years. New members rate *significantly lower* when it comes to *NPS* and *likelihood to rejoin*. Members at the 3-5 year membership mark rate *significantly lower* at each of the key metrics.

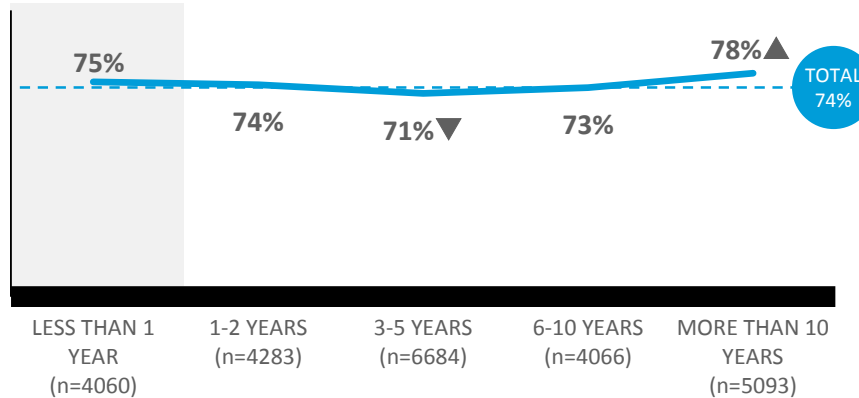
OVERALL SATISFACTION



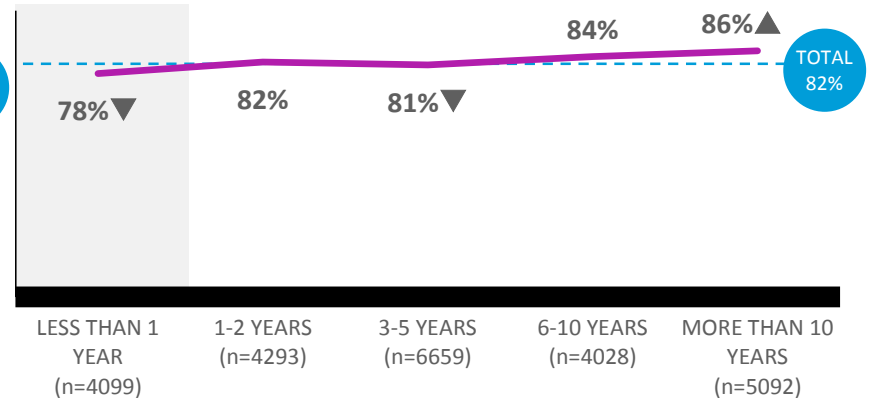
NET PROMOTER SCORE



VALUE FOR MONEY



LIKELIHOOD TO REJOIN



LENGTH OF MEMBERSHIP

SUB-GROUP DIFFERENCES

The following groups are *significantly more* likely to be:

16%

**NEW MEMBERS
(LESS THAN 1
YEAR)**

- Members who belong to *get fit and healthy* (18% cf. 16% total) and *learn/improve skills* (29%)
- Play or train once a week or less (25%)
- Those who have not made a complaint in the last 3 months (17%)
- Female (17% cf. 15%)
- Māori (21%), Pasifika (29%), Asian & Indian (23%)

17%

1-2 YEARS

- Members who belong to *get fit and healthy* (21% cf. 17% total) and *learn/improve skills* (24%)
- Those who play or train once a week or less (19%) or two or three times per week (19%)
- Those who have not made a complaint in the last 3 months (18%)
- Female (19% cf. 16% male)
- Māori (21%), Asian & Indian (24%)

27%

3-5 YEARS

- Members who belong to *play competitively* (30% cf. 27% total)
- Play or train two or three times a week (30%)
- Female (29% cf. 25% male)
- Those who are Māori (31%), Asian & Indian (32%)

16%

6-10 YEARS

- Members who belong to *play competitively* (20% cf. 16% total)
- Play or train four or more times a week (20%)
- Those who have made a complaint in the past 3 months (21%)
- Female (18% cf. 15% male)

24%

**MORE THAN 10
YEARS**

- Members who belong to *socialise* (31%) and *have access to facilities and playing fields/venues/courts* (43%)
- Play or train less than once a week (41%) or four or more times a week (31%)
- Very or extremely satisfied with the overall experience (25%)
- Have made a complaint in the last 3 months (34%) and likely to rejoin next season (25%)
- Male (28% cf. 17% Female)
- Those who are European (29%)

NSOs

SIGNIFICANTLY OVER-INDEX

SIGNIFICANTLY UNDER-INDEX

- Sport A (27%)
- Sport D (22%)
- Sport I (28%)

- Sport B (5%)
- Sport E (11%)
- Sport F (11%)
- Sport G (11%)

- Sport A (21%)
- Sport C (21%)
- Sport D (22%)
- Sport I (24%)

- Sport B (8%)
- Sport E (12%)
- Sport F (11%)

- Sport C (31%)
- Sport D (32%)
- Sport G (35%)
- Sport I (31%)
- Sport J (32%)

- Sport B (21%)
- Sport E (16%)
- Sport F (19%)

- Sport B (24%)
- Sport D (17%)
- Sport G (20%)

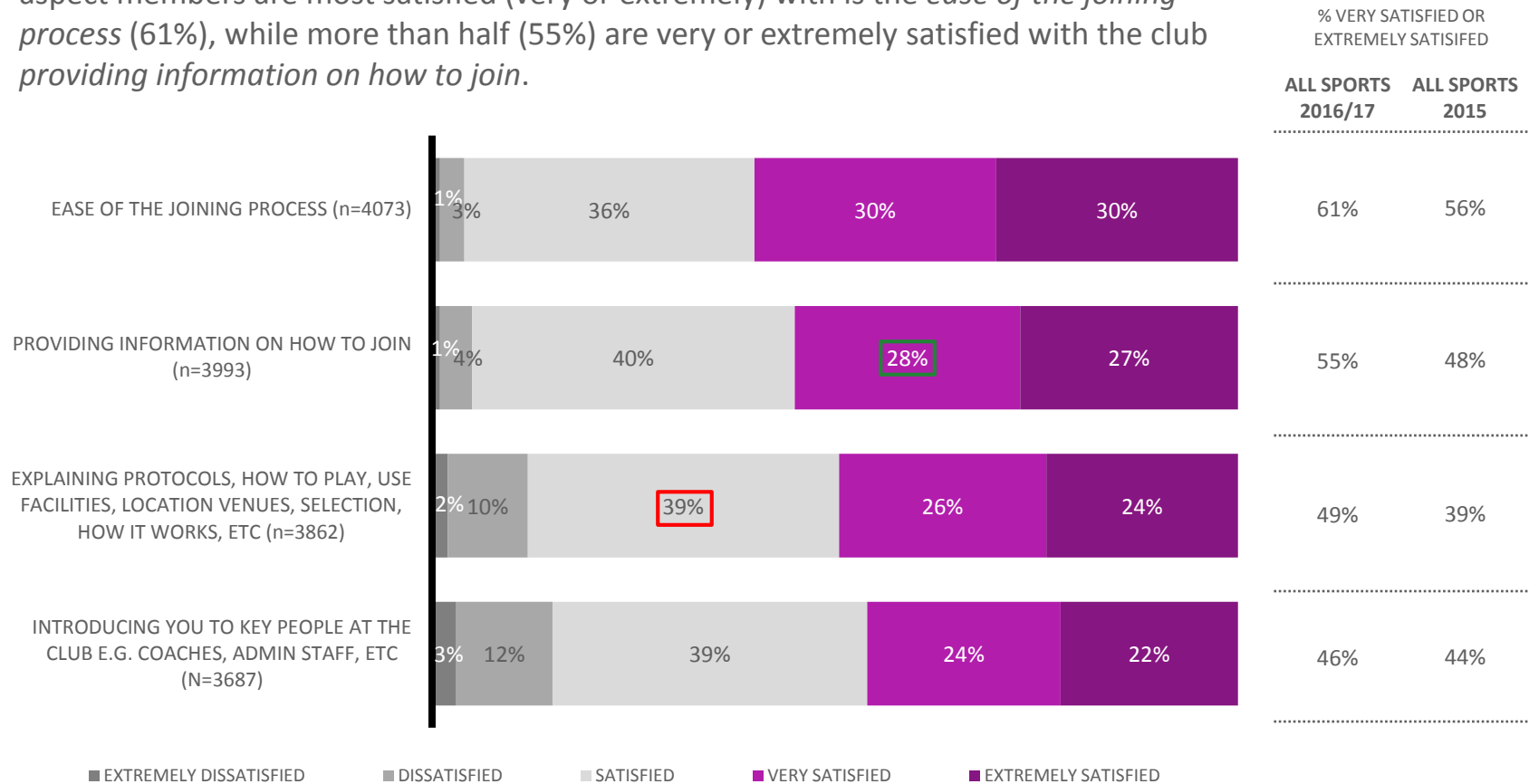
- Sport A (12%)
- Sport I (9%)

- Sport B (42%)
- Sport E (48%)
- Sport F (43%)
- Sport H (33%)

- Sport A (14%)
- Sport C (14%)
- Sport D (7%)
- Sport G (16%)
- Sport I (8%)
- Sport J (14%)

HOW IS THE JOINING PROCESS RATED?

16% of players have been members of their current club for less than a year. Each aspect of the joining process is rated higher compared with the average for all sports in 2015. The aspect members are most satisfied (very or extremely) with is the *ease of the joining process* (61%), while more than half (55%) are very or extremely satisfied with the club *providing information on how to join*.



Base: Respondents who have been a member for less than one year (Excluding Don't know/not applicable)
 Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their <-sport> <club>. How satisfied are you with your/ their <club> on the following

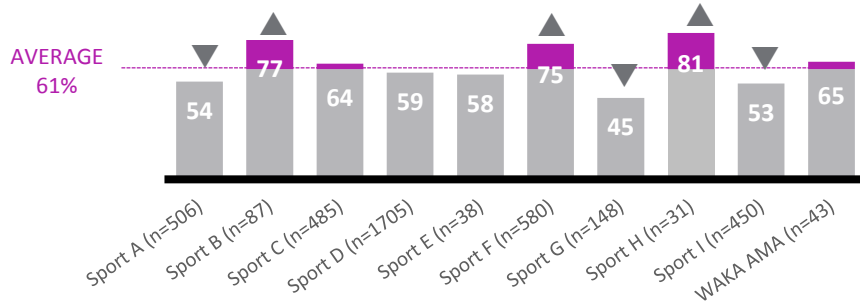
Significantly higher/lower than All Sports 2015

JOINING PROCESS

The two highest rated aspects of the joining process, in terms of satisfaction, are *the ease of the joining process* (61%) and the club *providing information on how to join* (55%).

EASE OF THE JOINING PROCESS

Members of Sport H (81%), Sport B (77%), and Sport F (75%) clubs are significantly more likely to be very or extremely satisfied with the *ease of the joining process*.



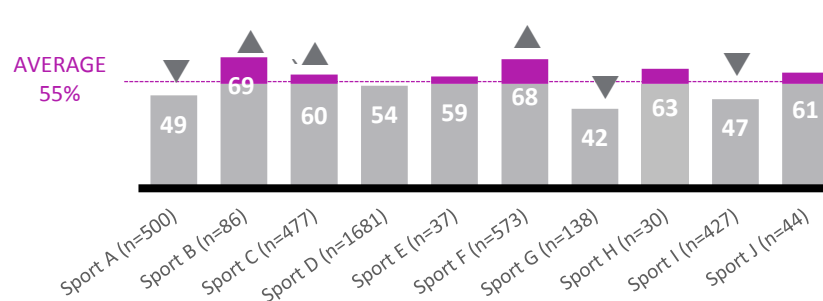
SUB-GROUP DIFFERENCES

Those significantly more likely to be very or extremely satisfied are:

- Players (67% cf. 54% parents of players)
- Those who play or train *four or more times a week* (70% cf. 61% total)
- Previously members of another club (66% cf. 56% for those that have not been a member of another club)
- Very likely to rejoin next season (74%) and have not complained in the past 3 months (62%)
- Male (63% cf. 59% female)
- Players who have played for the top team at the club (69%), represented their club at a regional event/ competition (72%) and/or region at a national event/ competition (72%)

PROVIDING INFORMATION ON HOW TO JOIN

Members of Sport B (69%), Sport F (68%), and Sport C (60%) clubs are significantly more likely to be very or extremely satisfied with the club *providing information on how to join*.



SUB-GROUP DIFFERENCES

Those significantly more likely to be very or extremely satisfied are:

- Players (61% cf. 49% parents of players)
- Member who belong to *play competitively* (60% cf. 55% total)
- Those who play or train *two or three times a week* (60%) or *four or more times a week* (69%)
- Previously members of another club (62% cf. 52% for those that have not been a member of another club) and main reason for changing was *the club was more friendly and welcoming* (86%)
- Very likely to rejoin next season (67%) and have not complained in the past 3 months (56%)
- Male (57% cf. 53% female)
- Those who have represented their club at a regional event/ competition (67%)

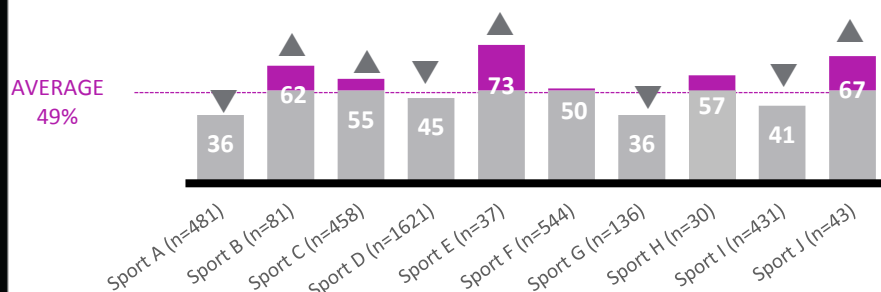
Base: Respondents who have been a member for less than one year (Excluding Don't know/not applicable)
 Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their < sport> <club>. How satisfied are you with your/ their <club> on the following...

JOINING PROCESS

Fewer than half of members are satisfied with their club *explaining protocols, how to play, use facilities, location venues, selection, how it works, etc* (49%) and *introducing you/ you or your child to key people at the club e.g. Coaches, admin staff, etc* (46%).

EXPLAINING PROTOCOLS, HOW TO PLAY, USE FACILITIES, LOCATION VENUES, SELECTION, HOW IT WORKS, ETC

Members of Sport E (73%), Sport J (67%), Sport B (62%), and Sport C (55%) clubs are *significantly more* likely to be very or extremely satisfied with their club *explaining protocols*.



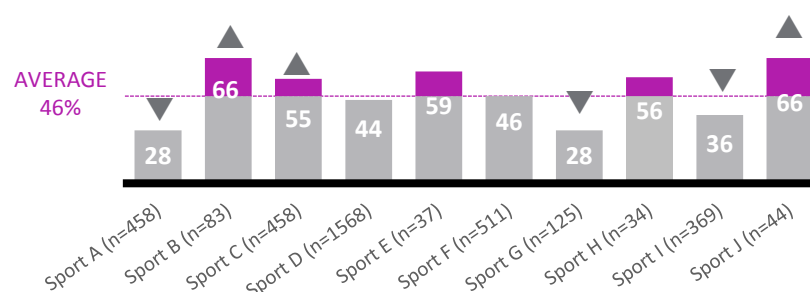
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (57% cf. 41% parents of players)
- Those who play or train *four or more times a week* (61% cf. 49% total)
- Previously members of another club (56% cf. 47% for those that have not been a member of another club)
- Very likely to rejoin next season (62%) and have not complained in the past 3 months (50%)
- Male (52% cf. 45% female)
- Those aged 16-24 (59%), 25-34 (63%) or 55-64 (65%)
- Those who have played for the top team at their club (58%) and/or represented their club at a regional event/ competition (60%)

INTRODUCING YOU TO KEY PEOPLE AT THE CLUB E.G. COACHES, ADMIN STAFF, ETC

Similarly with explaining protocols, Sport B (66%), Sport J (66%), and Sport C (55%) members are more satisfied (very or extremely satisfied).

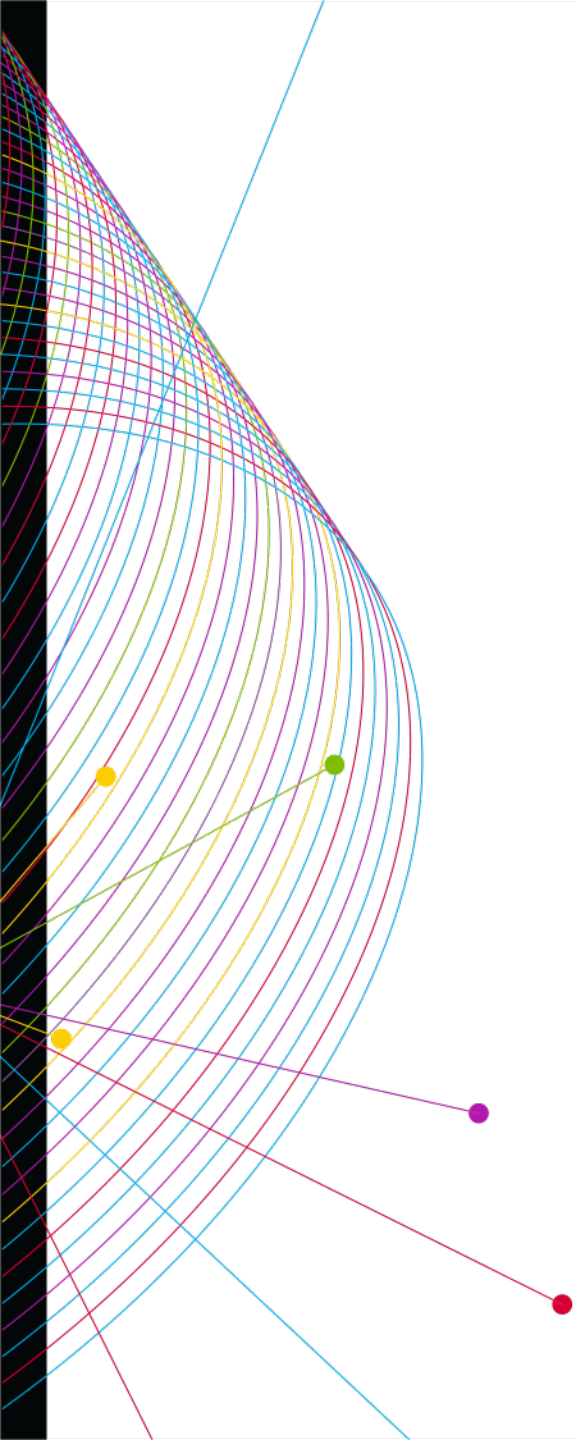


SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Players (55% cf. 36% parents of players)
- Previously members of another club (55% cf. 40% for those that have not been a member of another club)
- Very likely to rejoin next season (60%) and have not complained in the past 3 months (47%)
- Male (49% cf. 41% female)
- Those aged 16-24 (57%)
- Those who have represented the top team at their club (55%)

Base: Respondents who have been a member for less than one year (Excluding Don't know/not applicable)
 Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their < sport> <club>. How satisfied are you with your/ their <club> on the following...



INJURY MANAGEMENT

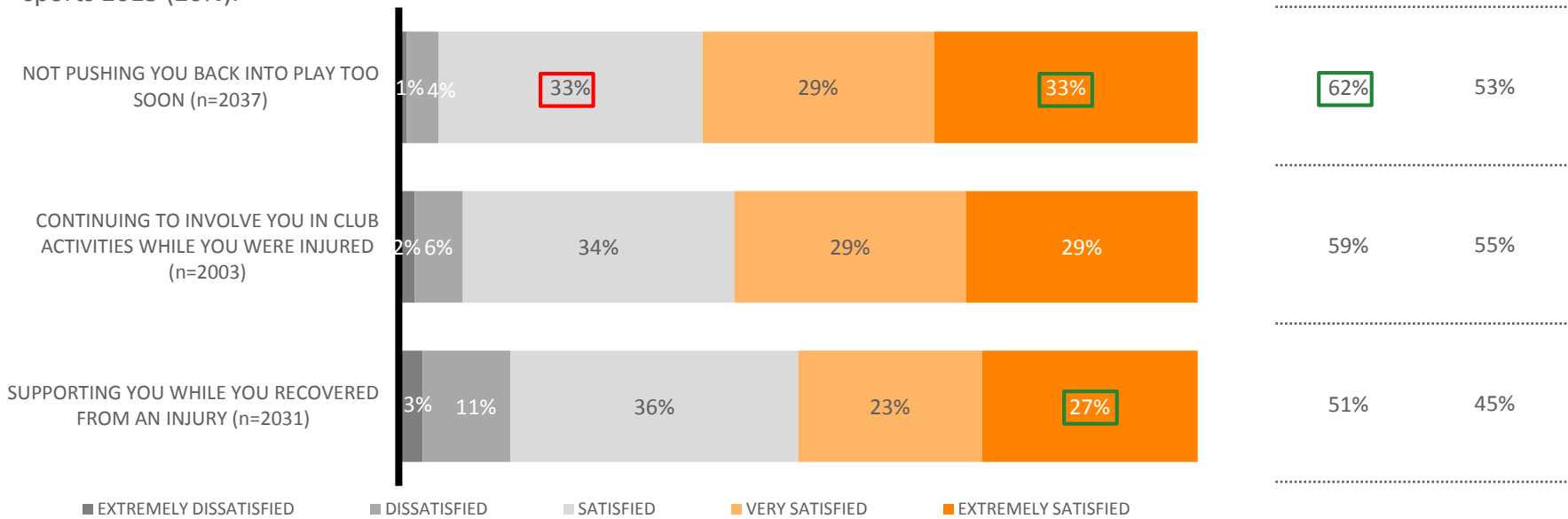
SUPPORTING INJURED PLAYERS



21% of players have been injured while playing or training for their sport in the last 12 months. This is significantly lower than 2015 (39%).

Sport	%	Sport	%
Sport A	23	Sport I	14
Sport B	5	Sport J	21
Sport C	25	Sport D	26
Sport E	12	Sport H	45
Sport F	-	Sport G	35

Two thirds (62%) of players who have been injured in the last 12 months are satisfied (very or extremely satisfied) with their club not pushing them back into playing too soon. This is significantly higher than the average for all sports in 2015 (53%). They are also significantly more likely to indicate they are extremely satisfied with the support received while recovering from an injury (27%) compared with the average for all sports 2015 (20%).



Base: All respondents (n=13712)

Q17. Have/ Has you/ your child been injured while <playing> or training for <sport> in the last 12 months? [Sport E] Have/ Has you/ your child been involved in an incident while flying in the last 12 months?

Base: Those who have been injured in the last 12 months excluding don't know/ can't say and not applicable

Q18. How satisfied are you with your/ your child's <sport> <club>, coach, instructor or manager on the following...

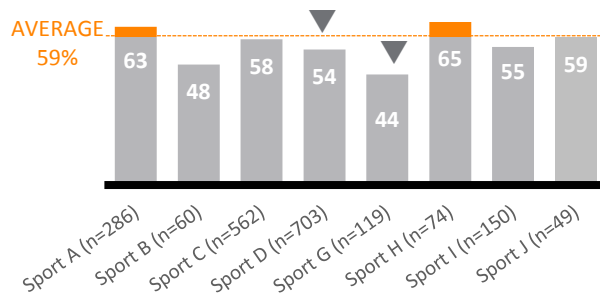
Note: Sport E was not asked Q18 and Sport F was not asked Q17 or Q18.

Significantly higher/lower than All Sports 2015

CONTINUING TO INVOLVE YOU IN CLUB ACTIVITIES WHILE YOU WERE INJURED

CONTINUING TO INVOLVE YOU IN CLUB ACTIVITIES WHILE YOU WERE INJURED

Sport H (65%) and Sport A (63%) are above average at continuing to involve players while they are injured. Sport D and Sport G members are *significantly less* likely to indicate they are very or extremely satisfied with the level of involvement (54% and 44%, respectively).



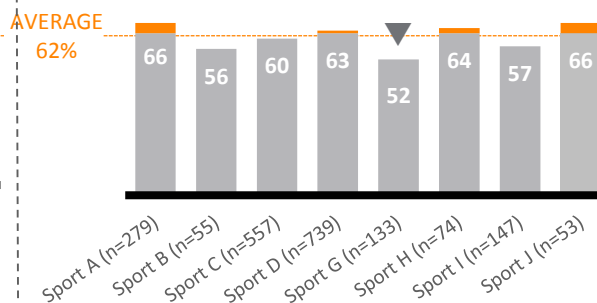
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Those who play or train *four or more times a week* (65% cf. 59% total)
- Very likely to rejoin next season (68%) and have not complained in the past 3 months (61%)
- Those aged 25-34 (71%)
- Players who have represented their region at a national event/ competition (66%)

NOT PUSHING YOU BACK INTO PLAY TOO SOON

Sport G (52%) members are *significantly less* likely to indicate they are very or extremely satisfied with not being pushed back into play too soon.



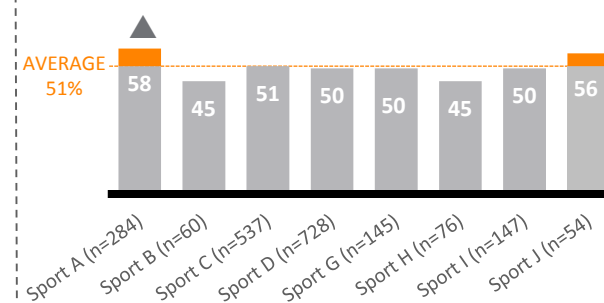
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

- Those who play or train *four or more times a week* (68% cf. 62% total)
- Very likely to rejoin next season (71%) and have not complained in the past 3 months (64%)
- Those aged 16-24 (71%)

SUPPORTING YOU WHILE YOU RECOVERED FROM AN INJURY

While Sport A (58%) and Sport J (56%) clubs are above average at support while recovering from an injury, Sport A participants are *significantly more* likely to indicate they are very or extremely satisfied.



SUB-GROUP DIFFERENCES

Those *significantly more* likely to be very or extremely satisfied are:

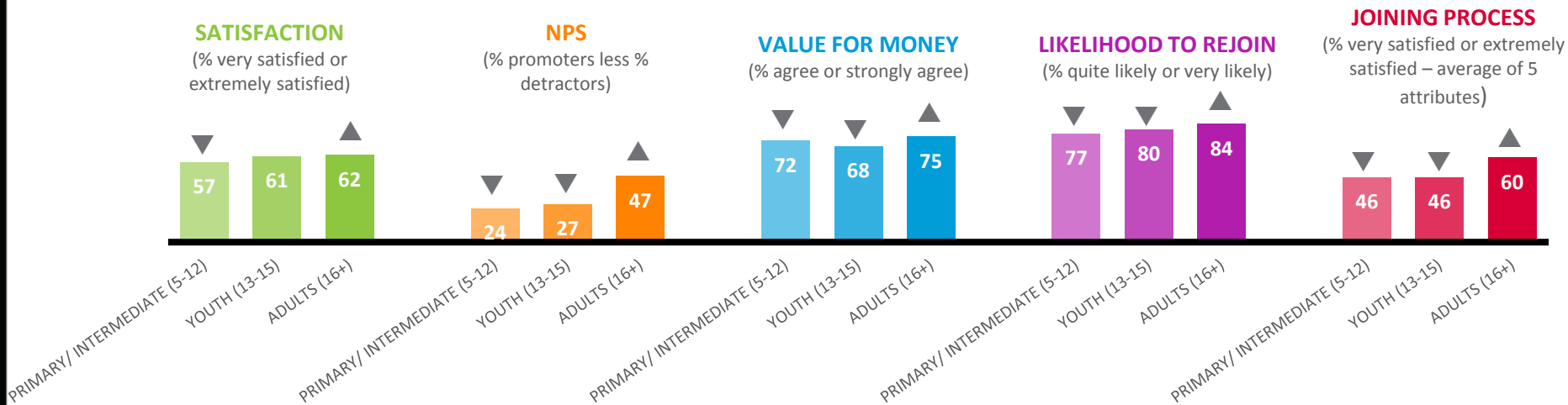
- Those who play or train *four or more times a week* (60% cf. 51% total)
- Very likely to rejoin next season (59%) and have not complained in the past 3 months (53%)

An abstract graphic on the left side of the slide. It features a vertical black bar on the far left. From this bar, a series of thin, curved lines in various colors (blue, green, yellow, orange, red, purple) fan out towards the right. Some of these lines terminate in small, solid-colored dots. The overall effect is that of a complex, multi-colored web or network structure.

DEMOGRAPHIC DIFFERENCES

HOW DO KEY AGE BRACKETS COMPARE?

Variations in performance across the key metrics are quite evident when broken down by age. Adults (16+) are *significantly higher* across each of the metrics, while primary/intermediate are the lowest in each of the key metrics with the exception of value for money.



HOW DO PRIMARY/INTERMEDIATE (5-12 YEAR OLDS), YOUTH (13-15 YEAR OLDS) AND ADULTS DIFFER?

When comparing the younger age brackets with the total, the primary/intermediate (5-12 years) age group are *significantly more likely* to be:

- Members to *have fun* (17% cf. 16% total) and to *learn/improve skills* (22% cf. 12%)
- Unlikely to rejoin next season (13% cf. 11%)
- Indicating they want improvement in *quality coaching* (31% cf. 16%), *player development programmes* (22% cf. 18%), *quality of officiating* (6% cf. 5%), or *communications* (5% cf. 4%) if fees were to increase.
- Female (40% cf. 36% total)
- Māori (20% cf. 16%), Pasifika (7% cf. 4%), Asian & Indian (4%).

Youth (13-15 year olds) are *significantly more likely* to be:

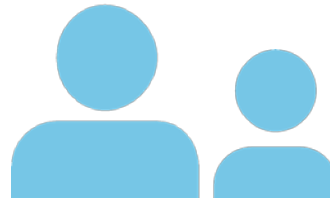
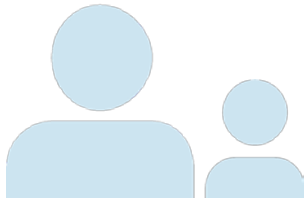
- Members who belong to *play competitively* (64% cf. 34% total)
- Indicating they want improvement in *quality coaching* (27% cf. 16%) or *player development programmes* (21% cf. 18%) if fees were to increase.
- Have been injured while playing or training in the past 12 months (27% cf. 21%)
- Female (52% cf. 36% total)
- Māori (32% cf. 16%), Pasifika (11% cf. 4%)
- Players who play for the top team at their club (37% cf. 23%), have been selected to represent my/ their club at a regional event/ competition (38% cf. 20%) and/or been selected to represent my/ their region or club at a national event/ competition (27% cf. 14%).

Adults (16+) are *significantly more likely* to be:

- Members who belong to *have access to facilities and playing fields/ venues/ courts* (10% cf. 7%)
- Playing or training *less than once a week* (6% cf. 4%) or *four or more times a week* (30% cf. 26%)
- Have been injured while playing or training in the past 12 months (24% cf. 21%)
- Male (67% cf. 64% total).

HOW DO KEY AGE BRACKETS COMPARE?

The following outlines what the differing age brackets (primary/intermediate (5-12 years), youth (13-15 year) and adults (16+)) are *significantly less likely* to be.



HOW DO PRIMARY/INTERMEDIATE (5-12 YEAR OLDS), YOUTH (13-15 YEAR OLDS) AND ADULTS DIFFER?

The **primary/intermediate (5-12 years)** age group are *significantly less likely* to be:

- Members to *play competitively* (31% cf. 34% total), to *socialise* (6% cf. 9%), and to *have access to facilities and playing fields/ venues/ courts* (2% cf. 7%)
- Playing or training *less than once a week* (9% cf. 24%)
- Indicating they do not want anything to improve if it means fees need to increase (14% cf. 15%)
- Less likely to indicate they want improvement to *facilities e.g. club rooms, changing rooms, toilets* (12% cf. 16%), *playing/ training venues/ fields/ courts* (10% cf. 16%), *management of the club* (3% cf. 7%) or *social activities* (3% cf. 5%)
- Injured while playing or training (9% cf. 21%)
- Complainants to their club in the last 3 months (6% cf. 9%)
- Male (60% cf. 64%).

Youth (13-15 year olds) are *significantly less likely* to be:

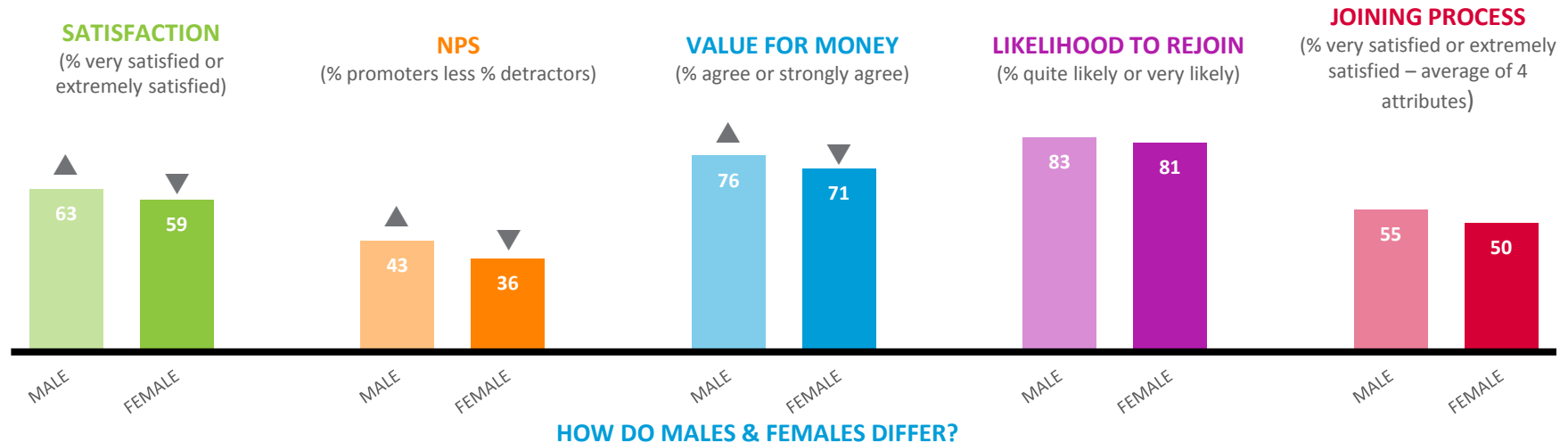
- Members who belong to *socialise* (4% cf. 9% total), to *get fit and healthy* (10% cf. 13%), to *have access to facilities and playing fields/ venues/ courts* (2% cf. 7%), to *have fun* (5% cf. 16%) and to *learn/ improve skills* (8% cf. 12%)
- Playing or training *less than once a week* (9% cf. 24%)
- Indicating they do not want anything to improve if it means my fees need to increase (11% cf. 15%)
- Less likely to indicate they want improvement to *management of the club* (3% cf. 7%) or *social activities* (3% cf. 5%)
- Male (48% cf. 64%)
- European/Pakeha (66% cf. 80%).

Adults (16+) are *significantly less likely* to be:

- Members who belong to *play competitively* (32% cf. 34%) and to *learn/improve skills* (9% cf. 12%)
- Playing or training *once a week* (16% cf. 20%) or *two or three times a week* (45% cf. 47%)
- Less likely to indicate they want improvement to *quality of coaching or instructors* (10% cf. 16%)
- Female (33% cf. 36%).

A THIRD OF MEMBERS ARE FEMALE

When the key metrics are broken down by gender, males rate *significantly higher* in the key metrics of satisfaction, NPS (in particular, females are *significantly more* likely to be detractors (20% cf.16% of males).) and value for money. Females are *significantly less* likely to be satisfied with the joining process aspects of *introducing you to key people at the club* (41% cf. 49% males) and *explaining protocols* (45% cf. 52%).



Males are significantly more likely than females to be:

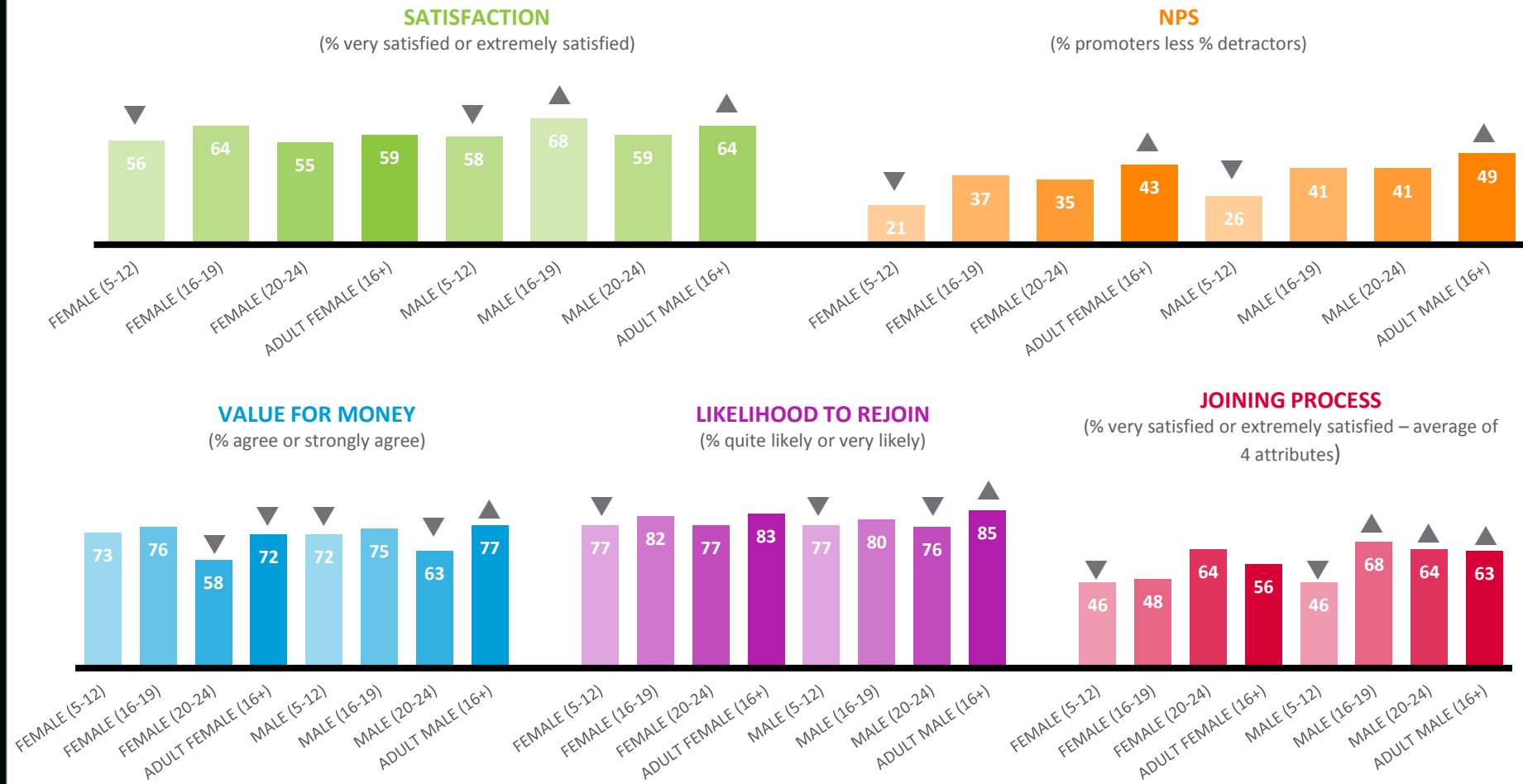
- Members for more than 5 years (43% cf. 35%)
- Previously members of another club (48% cf. 39%)
- Belong to a club to *have fun* (18% cf. 11%) or *have access to facilities and playing fields/venues/ courts* (9% cf. 4%)
- Playing or training *less than once a week* (5% cf. 3%) or *6 or more times a week* (10% cf. 7%)
- Satisfied (very or extremely satisfied) with the key club experience factors; *being friendly and welcoming* (75% cf. 68%), *having clean and well maintained facilities* (60% cf. 55%), *providing the information when needed* (62% cf. 59%), *allowing me to fulfil my potential* (61% cf. 57%), *is fair and provides equal opportunities for all players* (63% cf. 57%), and *the social environment at the club* (64% cf. 60%)
- Wanting improvement to *playing/training venues* (18% cf. 11%) and *management of the club* (8% cf. 6%) if fees were to increase
- Those aged 55-64 (12% cf. 9%) or 65+ (19% cf. 11%)
- NZ European/ Pakeha (83% cf. 74%) or Asian & Indian (5% cf. 2%)
- Coaches or instructors (13% cf. 10%) and/or Committee Members (12% cf. 10%)
- Players that have played for the top team at their club (25% cf. 19%)

Females are significantly more likely than males to be:

- New members (less than a year) (17% cf. 15%) or members for less than 5 years (65% cf. 57%)
- Belong to a club to *play competitively* (37% cf. 32%) or *get fit and healthy* (18% cf. 10%)
- Playing or training *two or three times a week* (49% cf. 46%)
- Dissatisfied (very or extremely dissatisfied) with the key club experience factors; *is fair and provides equal opportunities for all players* (13% cf. 11%), *having clean and well maintained facilities* (11% cf. 9%), and *being friendly and welcoming* (6% cf. 4%)
- Wanting improvement to *player development programmes* (23% cf. 16%), *facilities e.g. club rooms, changing rooms, toilets* (18% cf. 16%), and *quality of officiating* (8% cf. 4%) if fees were to increase
- Children (under 16)(35% cf. 26%), aged 16-19 (8% cf. 6%), and 35-39 (7% cf. 5%)
- Māori (27% cf. 11%) or Pasifika (6% cf. 3%)
- Players (92% cf. 89%), Officials/ referees/ umpires/ judges(7% cf. 5%), Managers (5% cf. 4%)
- Players that have represented their club at a regional event/ competition (22% cf. 18%), region or club at a national event/ competition (17% cf. 12%) and/ or New Zealand at an international event/ competition (3% cf. 2%)

HOW DO AGE & GENDER DIFFER: KEY METRICS

When analysing by gender and age, the younger members (those primary/intermediate aged (5-12 years)) are *significantly less* likely to be satisfied (very or extremely satisfied) with each of the key metrics whether they are male or female (with the exception of value for money for females aged 5 to 12). Adult males are *significantly more* likely to be satisfied than any other age and gender split.



Base: Youth Females (Primary & Intermediate) (n=2190), Female (16-19) (n=531), Female (20-24) (n=221), Adult Females (16+) (n=4270), Youth Males (Primary & Intermediate) (n=5839), Male (16-19) (n=916), Male (20-24) (n=468), Adult Males (16+) (n=10820)

▲ ▼ Significantly higher/lower than Total

WHAT ARE THE AGE DIFFERENCES AMONG FEMALES

MAIN REASON FOR BELONGING



- ▶ **Primary/ intermediate females (aged 5-12 years)** are *significantly more* likely to indicate the main reason they belong to a club is to **learn/improve skills** (18% cf. 12%) and **get fit and healthy** (17% cf. 13%)
- ▶ **Females aged 16-19, 20-24 and adult females (16+)** are *significantly more* likely to indicate the main reason is to **play competitively** (55%, 47% and 36% respectively cf. 34%).
- ▶ **Adult females (16+)** are also *significantly more* likely to belong to **get fit and healthy** (20% cf. 13%).

HOW FREQUENT ARE THEY PLAYING

2 > 3 > 4

- ▶ **Primary/ intermediate females** are *significantly more* likely to play or train **once a week or less** (39% cf. 24%) or **two or three times a week** (53% cf. 47%)
- ▶ **Females aged 16-19 and adult females (16+)** are *significantly more* likely to indicate they play or train **four or more times a week** (44% and 30% cf. 26%).

CLUB EXPERIENCE FACTORS



Overall, **females are less satisfied than males** across the core factors of club experience. In particular:

- ▶ **Primary/ intermediate females** are *significantly more* likely to indicate they are **least satisfied** with the **quality of the coaches or instructors** (19% cf. 9%), **having clean and well maintained facilities** (13% cf. 9%) and **allowing me to fulfil my potential** (9% cf. 5%)
- ▶ **Females aged 16-19** are also *significantly more* to indicate they are least satisfied with **having clean and well maintained facilities** (19% cf. 9%) as well as **making me aware of the developments occurring in their sport** (14% cf. 6%) and **providing information about junior programmes** (9% cf. 4%)
- ▶ **Adult females (16+)** are *significantly more* likely to indicate they are least satisfied with the club **being fair and provides equal opportunities for all players** (17% cf. 10%).

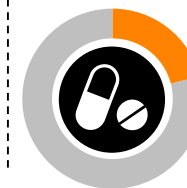
FOCUS FOR IMPROVEMENT



If fees increased, the **focus for improvement** varies for females of differing ages:

- ▶ **Quality of officiating** is an area **primary/intermediate females and females aged 16-19, 20-24 and 16+** would all want to see improved (9%, 11%, 16%, and 8% respectively cf. 5%)
- ▶ **Primary/ intermediate females** are *significantly more* likely to indicate they would want it to be invested in the **quality of coaching or instructors** (27% cf. 16%) and **player development programmes** (23% cf. 18%)
- ▶ **Females aged 16-19 and adults females (16+)** are *significantly more* likely to indicate that they would want improvement to **facilities e.g. club rooms, changing rooms, toilets** (23% and 20% cf. 16%)
- ▶ **Females 20-24** would want to see improvement to **social activities** (12% cf. 5%)

INJURIES



Primary/ intermediate females are *significantly less* likely to indicate **they have been injured while training or playing in the last 12 months** (10% cf. 35% females aged 16-19, 38% females aged 20-24, and 25% adult females (16+)).

WHAT ARE THE AGE DIFFERENCES AMONG MALES

MAIN REASON FOR BELONGING



- ▶ **Primary/ intermediate males** are *significantly more* likely to indicate the main reason they belong to a club is to **learn/improve skills** (24% cf. 12%) and **have fun** (19% cf. 16%)
- ▶ **Males aged 16-19** and **aged 20-24** are *significantly more* likely to indicate they belong to **play competitively** (55% and 51% cf. 34%)
- ▶ **Adult males (16+)** are *significantly more* likely to belong to **have fun** (19% cf. 16%), **have access to facilities and playing fields/ venues** (12% cf. 7%), and **to socialise** (10% cf. 9%).

HOW FREQUENT ARE THEY PLAYING

2 > 3 > 4

- ▶ **Primary/ intermediate males** are *significantly more* likely to indicate that they play or train **once a week or less** (33% cf. 24%) or **two or three times a week** (56 cf. 47%)
- ▶ **Males aged 20-24** are *significantly more* likely to play or train **two or three times a week** (58% cf. 47%)
- ▶ **Males aged 16-19** and **adult males (16+)** are *significantly more* likely to play or train **four or more times a week** (34% and 30% cf. 26%).

CLUB EXPERIENCE FACTORS



For males, the **factors of least satisfaction vary by age**. In particular:

- ▶ **Primary/ intermediate males** are *significantly more* likely to indicate they are **least satisfied** with the **quality of the coaches or instructors** (16% cf. 9%) and **allowing me to fulfil my potential** (10% cf. 5%).
- ▶ **Males aged 16-19** are *significantly more* to indicate they are least satisfied with **having qualified/ experienced officials available when they compete** (12% cf. 6%)
- ▶ **Males aged 20-24** are *significantly more* likely to indicate they are least satisfied with **having well maintained playing/ training venues** (13% cf. 6%) and **the social environment at the club** (10% cf. 3%)
- ▶ **Adult males (16+)** are also *significantly more* likely to indicate the **social environment at the club** (4% cf. 3%) as an area they are least satisfied with, along with the club being **professional and well managed** (8% cf. 7%).

INJURIES



Primary/ intermediate males are *significantly less* likely to indicate they **have been injured while training or playing in the last 12 months** (8% cf. 26% males aged 16-19, 43% males aged 20-24, and 24% adult males (16+)).

FOCUS FOR IMPROVEMENT



If fees increased, the **focus for improvement** varies for females of differing ages:

- ▶ **Playing/ training venues/ fields/ court** is an area **males aged 16-19, 20-24 and 16+** would all want to see improved (22%, 23%, and 21%, respectively cf. 16%)
- ▶ **Primary/ intermediate males** are *significantly more* likely to indicate they would want it to be invested in the **quality of coaching or instructors** (35% cf. 16%), **player development programmes** (22% cf. 18%) and **communications** (5% cf. 4%)
- ▶ **Males aged 20-24** and **adults males (16+)** are *significantly more* likely to indicate that they would want improvement to **social activities** (9% and 6% cf. 5%)
- ▶ **Adult males (16+)** would also want to see improvement in the **management of the club** (9% cf. 7%).

Out of any age and gender group, **Males aged 20-24** have the highest proportion of those who have had an injury in the last 12 months (43%).

WHAT IS THE CLUB EXPERIENCE OF GIRLS AGED 13-19

KEY METRICS



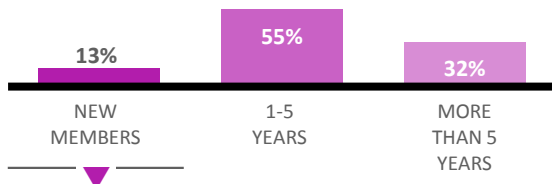
62% of girls aged 13 to 19 are satisfied with the overall experience at their club, however, they are **significantly less likely to**

recommend their club (NPS score of +32 cf. +40). This low NPS score is driven by not only by a **significantly lower proportion of promoters** (52% cf. 58%) but more detractors (20% cf. 18%)



71% agree or strongly agree that the opportunities, services and benefits that they receive from their club make it well worth the money they pay.

83% indicated they are likely or very likely to rejoin their current club next season.



43% of new members are satisfied with the overall process they went through when they joined their club which is **significantly lower than average** (53%).

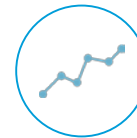
MAIN REASON FOR BELONGING



59% ▲



13%



12%

Three in five (59%) girls aged 13-19 belong to a club to **play competitively**. The next highest reasons are to **get fit and healthy** (13%) and to **learn/improve skills** (12%).

HOW FREQUENT ARE THEY PLAYING

2 > 3 > 4

Half (51%) play or train **two or 3 times a week** while two in five (40%) play or train **four or more times a week** (**significantly higher** than average (26%).

INJURIES



35% have been injured, which is **significantly higher than the average** (21%).

CLUB EXPERIENCE FACTORS



Of the nine core factors of club experience, girls aged 13-19 years are **significantly less satisfied** with:

- ▶ Being friendly & welcoming (66% cf. 72%)
- ▶ Having clean and well maintained facilities e.g. clubrooms, changing rooms, toilets (50% cf. 58%)
- ▶ Is fair and provides equal opportunities for all players (54% cf. 61%)

They are also **less satisfied** with the secondary factor of *the ease of accessing the clubs venues/ fields/ courts for training or casual playing* (56% cf. 63%).

They are, however, **significantly more** likely to be **satisfied** with:

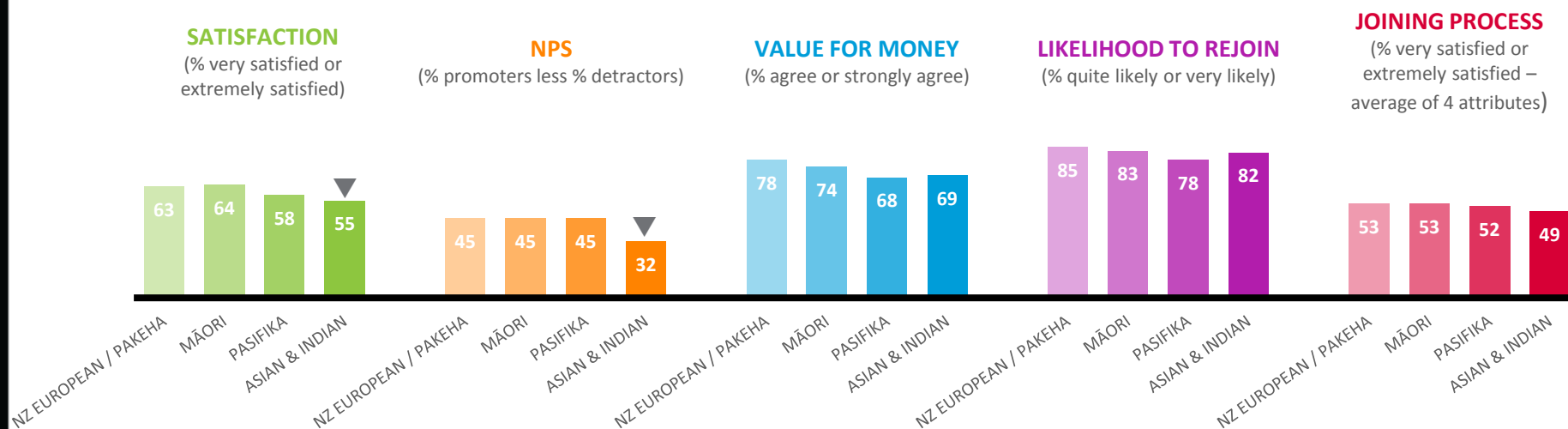
- ▶ Making aware of the developments occurring in sport across New Zealand (52% cf. 41%)
- ▶ Providing information and opportunities for officials development (49% cf. 44%)
- ▶ Providing information about junior programmes (53% cf. 49%)

If fees increased, they would **want improvement to:**

- ▶ Player development programmes (24% cf. 18%)
- ▶ Facilities e.g. club rooms, changing rooms, toilets (19%, although not significantly higher than the total)
- ▶ Quality of coaching or instructors (18%, also not significantly higher than the total 16%).

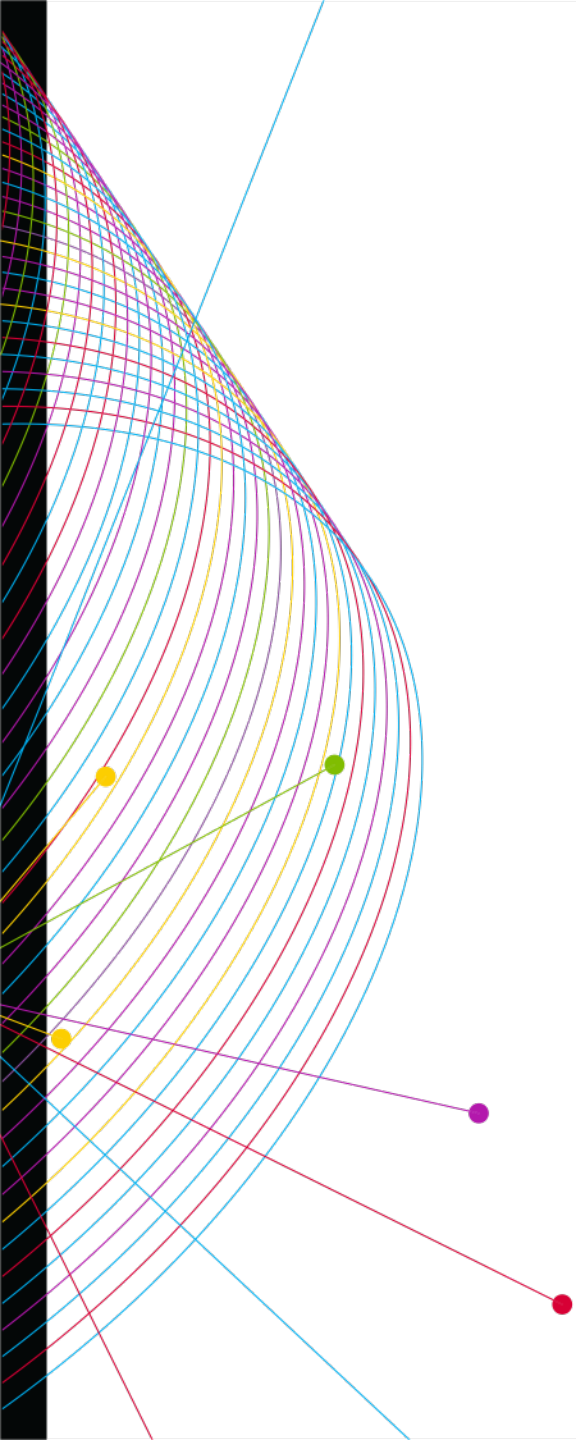
ASIAN & INDIAN PLAYERS ARE LEAST SATISFIED

Results for key metrics are consistent across ethnic groups with the exception of Asian & Indian members who are *significantly less* likely to indicate they are satisfied (very or extremely satisfied) with the overall experience of playing at their club and have a lower NPS score (32 cf. 40). Asian & Indian are *significantly less* likely to be promoters (50% cf. 58% total).



KEY DIFFERENCES BY ETHNICITY (WHEN COMPARED TO THE TOTAL)

- Māori (34%) and Pasifika (52%) are *significantly more* likely to be parents of players compared with 30% total
- Māori are *significantly more* likely to be casual players (3% cf. 2% total)
- Māori (13%), Pasifika (7%) and Asian & Indian (8%) are *significantly less* likely to have been members for more than 10 years (cf. 24% total)
- Māori (17%) and Pasifika (25%) are *significantly more* likely to belong to a club *to get fit and healthy* (13% total) and Māori (23%), Pasifika (20%) and Asian & Indian (27%) are *significantly more* likely to belong to a club *to learn/improve skills* (12% total). NZ Europeans are *significantly more* likely to belong to a club *to have fun* (24% cf. 16% total) and *have access to facilities and playing fields/ venues/ courts* (10% cf. 7%)
- NZ Europeans are *significantly more* likely to indicate that the club is *friendly and welcoming* (75% cf. 72%) and *well maintained playing/training venues/ fields/ courts* (69% cf. 65%)
- Māori (65%) and NZ Europeans (60%) are *significantly more* likely to indicate they are very or extremely satisfied with the *quality of the coaches or instructors* than the total (59%)
- Māori (65%) and NZ European (62%) are *significantly more* likely to indicate they are very or extremely satisfied with their club *allowing me to fulfil my potential* (cf. 59% total) and that the club *is fair and provides equal opportunities for all players* (63% and 64%, respectively, cf. 61% total). Conversely, Asian & Indian members are *significantly less* likely to indicate they are very or extremely satisfied with these aspects (52% and 54%, respectively)



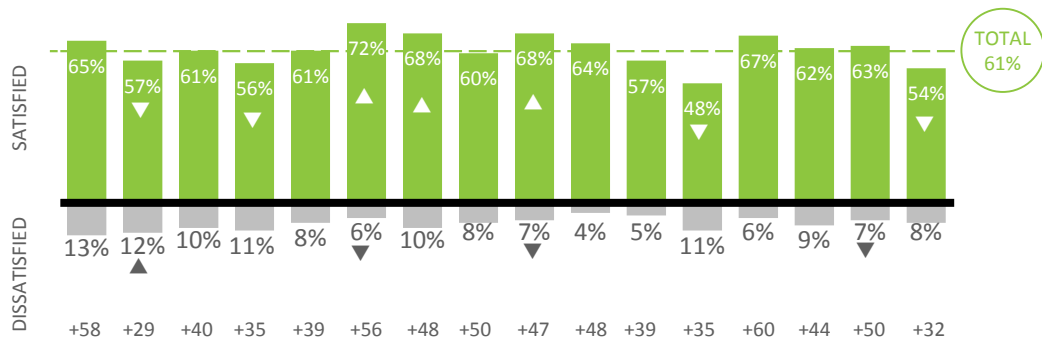
REGIONAL DIFFERENCES

REGIONAL BREAKDOWN OF KEY MEASURES

OVERALL SATISFACTION

(Q6: % very satisfied or extremely satisfied)

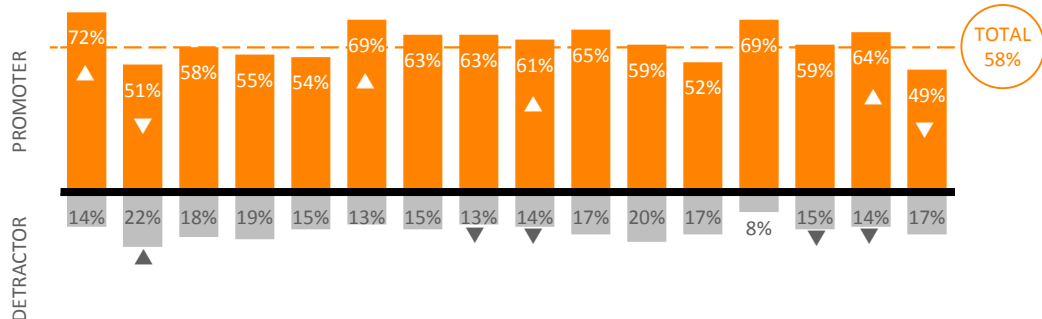
Hawkes Bay outperforms all other regions, with *significantly higher* levels of overall satisfaction (72% cf. 61%). Marlborough has the lowest proportion of respondents who are satisfied (48% cf. 61%).



NET PROMOTER SCORE

(Q7: % promoters less % detractors)

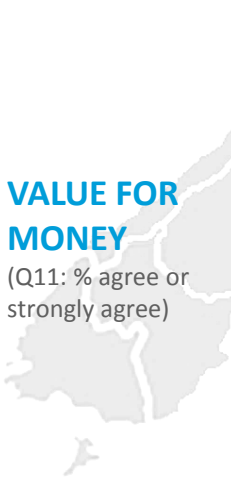
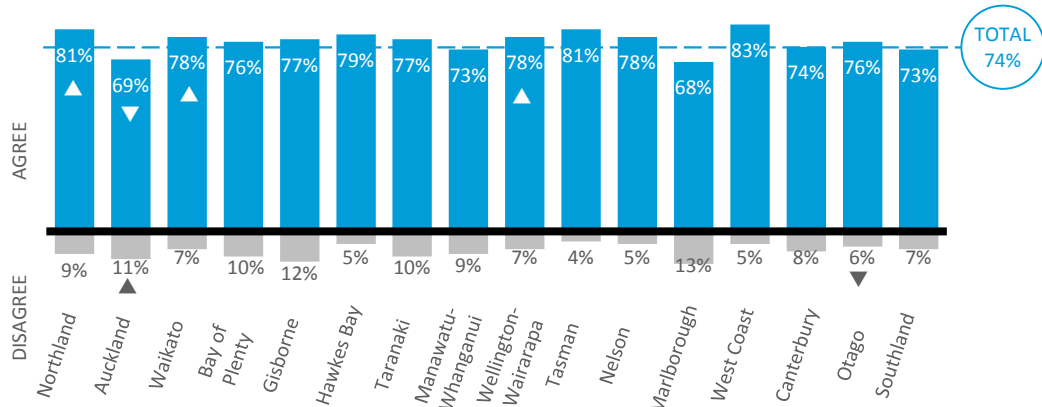
Auckland (51% cf. 58%) and Southland (49%) have a *significantly lower* proportion of respondents who are promoters. Auckland also has a *significantly higher* proportion of detractors (22%).



VALUE FOR MONEY

(Q11: % agree or strongly agree)

Northland (81% cf. 74%), Waikato (78%) and Wellington/Wairarapa (78%) have a *significantly higher* proportion of respondents who agree that their/their child's club provides value for money.

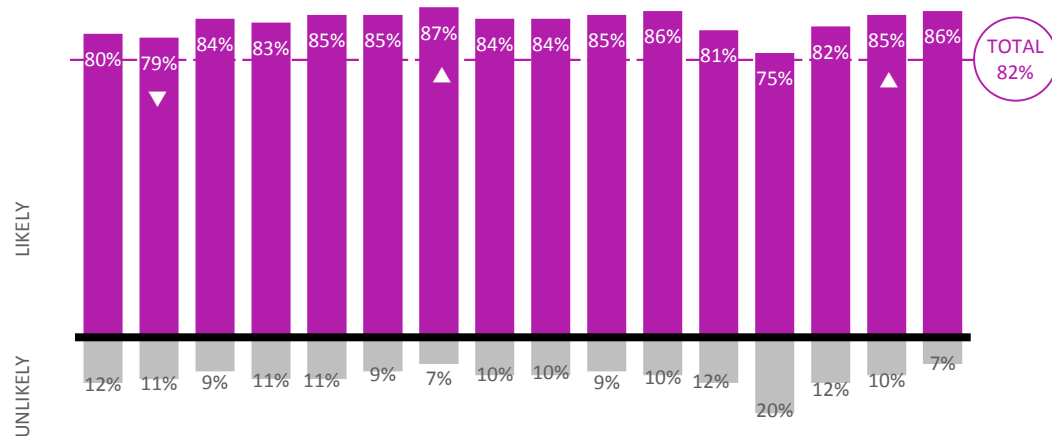


REGIONAL BREAKDOWN OF KEY MEASURES

LIKELIHOOD TO REJOIN

(Q9: % quite likely or very likely)

Taranaki (87% cf. 82%) and Otago (85%) have a *significantly higher* proportion of respondents who are likely to rejoin their club next season. Auckland respondents are less likely to rejoin (79%).

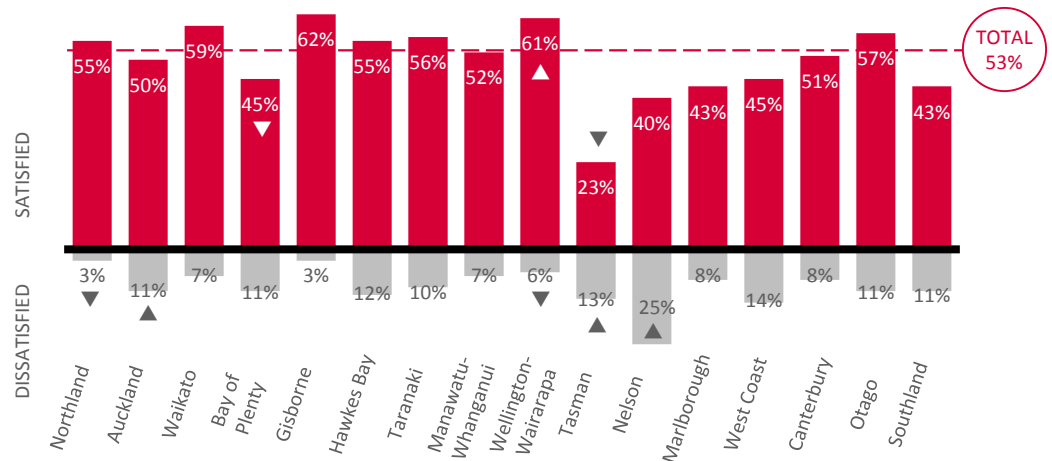


JOINING PROCESS

(Q20: % very satisfied or extremely satisfied – average of 4 attributes)

Although base sizes are small for Tasman, those from Tasman are *significantly less* likely to indicate they are satisfied (very or extremely) with the joining process (23% cf. 53%), as are those from the Bay of Plenty (45%)

Those from Wellington-Wairarapa have a *significantly higher* proportion of respondents who are satisfied with the joining process (61% cf. 53%).





SAMPLE PROFILES

SAMPLE PROFILE

GENDER	Total n=25631	Sport A n=1952	Sport B n=1826	Sport C n=3162	Sport D n=8235	Sport E n=365	Sport F n=5977	Sport G n=1609	Sport H n=271	Sport I n=1917	Sport J n=317
Male	64%	51%	67%	92%	81%	93%	77%	1%	78%	62%	36%
Female	36%	48%	33%	8%	19%	7%	23%	99%	21%	38%	63%
Gender Diverse	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%

PLAYER / PARENT	Total n=25631	Sport A n=1952	Sport B n=1826	Sport C n=3162	Sport D n=8235	Sport E n=365	Sport F n=5977	Sport G n=1609	Sport H n=271	Sport I n=1917	Sport J n=317
Player	70%	39%	100%	58%	23%	99%	99%	46%	100%	48%	89%
Parent of player	30%	61%	0%	42%	77%	1%	1%	54%	0%	52%	11%

Base: All respondents

Q25. Are/ Is you/ your child...?

Q1g. Firstly, are you a parent of a child who <plays> <sport> or do you <play> <sport>?

SAMPLE PROFILE

AGE	Total n=25631	Sport A n=1952	Sport B n=1826	Sport C n=3162	Sport D n=8235	Sport E n=365	Sport F n=5977	Sport G n=1609	Sport H n=271	Sport I n=1917	Sport J n=317
5-7 years	5%	16%	0%	5%	13%	0%	0%	4%	0%	13%	0%
8-10 years	10%	21%	0%	14%	24%	0%	0%	14%	0%	24%	2%
11-12 years	7%	10%	0%	13%	20%	0%	0%	14%	0%	9%	3%
13-15 years	6%	7%	0%	9%	18%	1%	0%	18%	1%	4%	5%
16-19 years	6%	8%	0%	12%	6%	4%	1%	11%	10%	9%	5%
20-24 years	3%	2%	0%	7%	2%	2%	1%	4%	10%	5%	2%
25-29 years	6%	2%	1%	10%	2%	4%	2%	7%	16%	7%	5%
30-34 years	4%	1%	0%	9%	2%	2%	3%	5%	11%	6%	3%
35-39 years	6%	3%	1%	7%	2%	3%	3%	8%	15%	9%	9%
40-44 years	6%	3%	2%	6%	3%	7%	4%	7%	12%	8%	11%
45-49 years	6%	4%	2%	4%	3%	8%	7%	4%	10%	3%	14%
50-54 years	6%	4%	4%	2%	3%	11%	10%	2%	8%	2%	16%
55-59 years	6%	3%	7%	1%	1%	13%	13%	0%	4%	1%	14%
60-64 years	5%	4%	9%	0%	0%	14%	15%	0%	1%	0%	7%
65-69 years	6%	3%	21%	0%	0%	13%	19%	0%	1%	0%	4%
70-74 years	5%	2%	25%	0%	0%	11%	13%	0%	1%	0%	1%
75+ years	4%	1%	26%	0%	0%	7%	9%	0%	0%	0%	0%

Base: All respondents

Q22. In which of the following age groups do/ does you/ your child belong?

SAMPLE PROFILE

REGION	Total n=25631	Sport A n=1952	Sport B n=1826	Sport C n=3162	Sport D n=8235	Sport E n=365	Sport F n=5977	Sport G n=1609	Sport H n=271	Sport I n=1917	Sport J n=317
Northland	3%	2%	3%	2%	2%	4%	4%	3%	6%	0%	7%
Auckland	30%	32%	22%	41%	33%	18%	28%	40%	42%	25%	17%
Waikato	8%	7%	6%	6%	7%	12%	9%	7%	4%	7%	18%
Bay of Plenty	6%	6%	10%	3%	6%	8%	11%	3%	1%	4%	8%
Gisborne	1%	0%	1%	1%	1%	0%	1%	1%	0%	1%	0%
Hawke's Bay	3%	2%	5%	4%	4%	3%	4%	1%	1%	0%	7%
Taranaki	3%	4%	4%	2%	3%	3%	3%	3%	1%	3%	3%
Manawatu-Wanganui	4%	3%	6%	3%	4%	3%	4%	2%	5%	2%	3%
Wellington-Wairarapa	14%	18%	15%	23%	14%	15%	10%	5%	9%	15%	15%
Tasman	1%	1%	1%	0%	1%	1%	1%	0%	0%	0%	4%
Nelson	2%	1%	2%	1%	1%	2%	1%	0%	0%	1%	8%
Marlborough	1%	0%	1%	1%	1%	1%	1%	0%	0%	2%	0%
West Coast	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
Canterbury	17%	14%	14%	6%	14%	16%	14%	20%	27%	32%	8%
Otago	6%	7%	8%	6%	6%	8%	7%	9%	2%	4%	2%
Southland	2%	2%	2%	1%	2%	0%	2%	3%	1%	3%	0%
Outside of New Zealand	1%	0%	1%	0%	0%	6%	1%	0%	0%	0%	0%

Base: All respondents

Q23. Which of the following regions do/does you/your child live in?

SAMPLE PROFILE

ROLE AT CLUB	Total n=24973	Sport A n=1926	Sport B n=1812	Sport C n=2998	Sport D n=8013	Sport E n=361	Sport F n=5946	Sport G n=1528	Sport H n=227	Sport I n=1851	Sport J n=311
Player	90%	94%	83%	97%	98%	73%	92%	96%	79%	97%	90%
Coach	12%	4%	12%	6%	4%	30%	1%	19%	25%	6%	14%
Manager	4%	1%	3%	3%	2%	1%	1%	6%	11%	7%	7%
Committee Member	11%	7%	21%	7%	2%	20%	10%	6%	19%	1%	20%
Official/ referee/ judge	5%	4%	13%	2%	1%	4%	1%	15%	7%	4%	2%
Club President or another office holder	7%	3%	21%	4%	1%	15%	5%	4%	8%	1%	11%
Other	4%	3%	7%	2%	1%	5%	2%	2%	9%	1%	4%

SAMPLE PROFILE

COMPETITIVE LEVEL	Total n=24973	Sport A n=1962	Sport B n=1812	Sport C n=2998	Sport D n=8013	Sport E n=361	Sport F n=5946	Sport G n=1528	Sport H n=227	Sport I n=1851	Sport J n=311
Played for the top team at my club	23%	27%	39%	38%	32%	0%	9%	0%	41%	18%	24%
Been selected to represent my club at a regional event/competition	20%	28%	36%	17%	17%	8%	18%	15%	12%	7%	37%
Been selected to represent my region at a national event/competition	14%	22%	17%	9%	10%	6%	2%	6%	19%	9%	36%
Been selected to represent New Zealand at an international event/competition	2%	4%	1%	0%	1%	1%	0%	0%	5%	2%	9%
None of these	63%	55%	44%	55%	61%	88%	77%	83%	49%	76%	45%

SAMPLE PROFILE

MEMBERSHIP TENURE	Total n=24667	Sport A n=1901	Sport B n=1794	Sport C n=2925	Sport D n=7985	Sport E n=360	Sport F n=5906	Sport G n=1479	Sport H n=221	Sport I n=1791	Sport J n=305
Less than 1 year	16%	27%	5%	17%	22%	11%	11%	11%	15%	28%	14%
1-2 years	17%	21%	8%	21%	22%	12%	11%	18%	16%	24%	21%
3-5 years	27%	26%	21%	31%	32%	16%	19%	35%	24%	31%	32%
6-10 years	16%	12%	24%	17%	17%	14%	16%	20%	11%	9%	19%
More than 10 years	24%	14%	42%	14%	7%	48%	43%	16%	33%	8%	14%

Base: Respondents who are members

Q3. How long have/ has you/ your child been a member of <insert club from Q2a>?

SAMPLE PROFILE

NSO	Total Count n=25631	% of Total	Parent n=10807	Player n=14824
Sport A	1952	8%	21%	6%
Sport B	1826	7%	0%	14%
Sport C	3162	12%	14%	8%
Sport D	8235	32%	26%	3%
Sport E	365	1%	0%	14%
Sport F	5977	23%	0%	14%
Sport G	1609	6%	18%	7%
Sport H	271	1%	-	14%
Sport I	1917	7%	17%	7%
Sport J	317	1%	4%	13%

Base: All respondents

Q1b. NSO NAME

Q1g. Firstly, are you a parent of a child who <plays> <sport> or do you <play> <sport>?

SAMPLE PROFILE

FREQUENCY OF PLAYING/ TRAINING

	Total n=24973	Sport A n=1926	Sport B n=1812	Sport C n=2998	Sport D n=8013	Sport E n=361	Sport F n=5946	Sport G n=1528	Sport H n=227	Sport I n=1851	Sport J n=311
Less than once a week / month	4%	4%	7%	3%	9%	9%	1%	2%	1%	7%	1%
Once a week / month	20%	41%	17%	17%	11%	8%	52%	6%	13%	14%	18%
Two or three times a week / month	47%	27%	61%	63%	36%	18%	39%	51%	65%	52%	64%
Four or five times a week / month	16%	16%	12%	14%	15%	23%	6%	33%	16%	14%	13%
6 or more times a week / month	9%	11%	1%	2%	20%	40%	1%	6%	4%	2%	3%
Other	3%	1%	2%	1%	8%	3%	0	2%	1%	10%	1%

Base: Respondents who are members

Q5. During the season, how often on average would you/ your child <play> <sport> per week (including training or competitions)?

An abstract graphic on the left side of the slide. It features a vertical black bar on the far left. From this bar, a series of thin, curved lines in various colors (blue, green, yellow, orange, red, purple) fan out towards the right. Some of these lines terminate in small, solid-colored dots of the same color. The overall effect is that of a complex, multi-colored web or network structure.

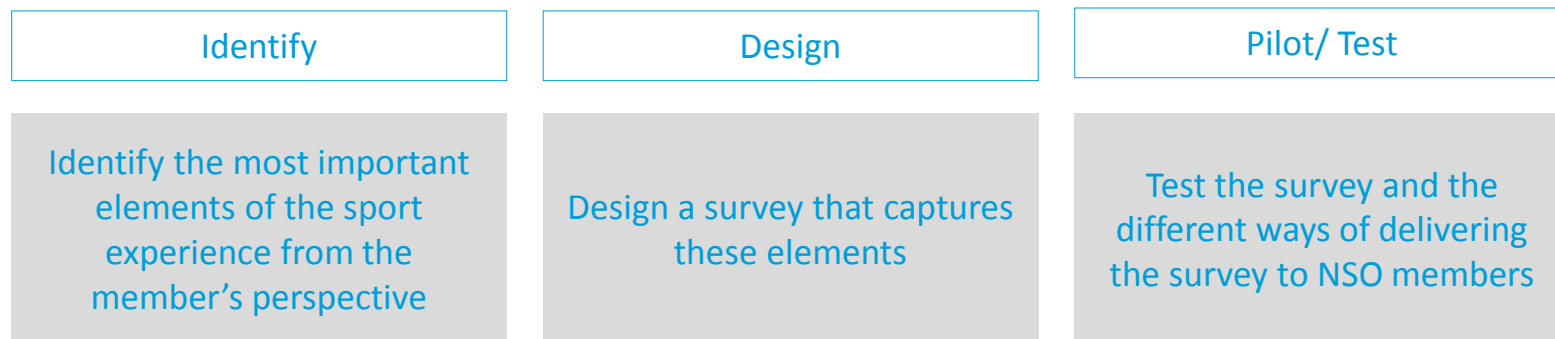
BACKGROUND, OBJECTIVES AND APPROACH

VOICE-OF-PARTICIPANT PROGRAMME

- This research is part of Sport New Zealand's Voice-of-Participant (VOP) programme to develop and implement a cross-sport and recreation sector approach; capturing, analysing, interpreting and using customer/ membership survey data.
- The objectives of the VOP programme are to:
 - Empower the sport system to respond to the wants and needs of customers.
 - Embed processes that continually put the participant at the centre of decision making.
 - Improve the development and delivery of products and services that meet the needs of participants.
 - Complement and systematize existing participant information and the processes by which participant information is gathered and analysed.
 - 'Bring' the voice-of-participant to the centre of the sport system (including Sport NZ).
- This part of the VOP programme is for National Sports Organisations (NSOs) to survey their members (i.e. players and parents of players) to understand the participant experience with their club.
- In future the programme will also roll out to cover events/ tournaments, RSTs/RSDs, TAs/ Councils, activities and even children doing sport at school.
- A customer/ participant experience approach is one that looks at behaviours, attitudes and needs as they relate to specific interaction points across total engagement with a sport/ service. It is valuable to organisations with members, helping them to understand how different interactions are perceived and what is really important to get right in order to retain and grow membership.
- All members of clubs had the opportunity to participate, with adults aged 16+ completing the questionnaire themselves ('players') and parents/guardians ('parents') completing the questionnaire for children under the age of 16, on behalf of their child.

THE DEVELOPMENT OF VOP

- While some work had previously been undertaken by Sport NZ and NSOs to create draft 'welcome' and 'mid-season' surveys, it was felt it was important to incorporate the participant's point of view on what was most important to them, and then test the reviewed surveys.
- In 2015, an initial development phase was undertaken to design the survey tools i.e.



- The development phase involved both **qualitative** and **quantitative** components:
 - The qualitative (two online bulletin boards with 28 participants) was to understand what makes a good or bad experience, and what players consider their ideal experience
 - Based on the qualitative findings we designed an online questionnaire
 - We piloted the questionnaire, using three different methods of delivery, with members of four NSOs; New Zealand Sport D, Sport K New Zealand, Sport B New Zealand and New Zealand Sport H.
- Subsequently, in consultation with Sport NZ and NSOs, we reviewed the survey tools and created a Survey Guide.
- The VOP for NSOs research was launched in Winter 2016 with Sport D, Sport H and Sport G. Summer Sports A, Sport E, Sport B, Sport J, Sport C and Sport F and Sport I followed in March 2017.
- The results for winter 2016 and summer 2016/17 have been combined to represent the 2016/2017 year.

QUANTITATIVE METHODOLOGY

ONLINE SURVEY - FIELDWORK

Winter:
20 October – 09 November 2016
Summer:
02 - 21 March 2017



APPROACH

The approach varied across the NSO's. A summary of the approaches used are on the following page.

THE RESEARCH

WEIGHTING

Weighting was only applied to the 'All Sports XXX' results. This was to ensure each NSO contributed evenly to the total result each year.



25,631 PLAYERS & PARENTS

A total of 25,631 respondents, consisting of 17,978 players and 7,653 parents of players completed the survey. This gave a maximum margin of error of $\pm 0.6\%$.

APPROACH

- An email invitation, containing an online link, was sent to players to invite them to complete the survey
- The type of link and who sent the links out, varied depending on one of three different approaches:



* Each NSO, with the exception of Sport D, supplemented the individual links with an open link shared via other channels, e.g. social media, newsletters, etc.

WEIGHTING

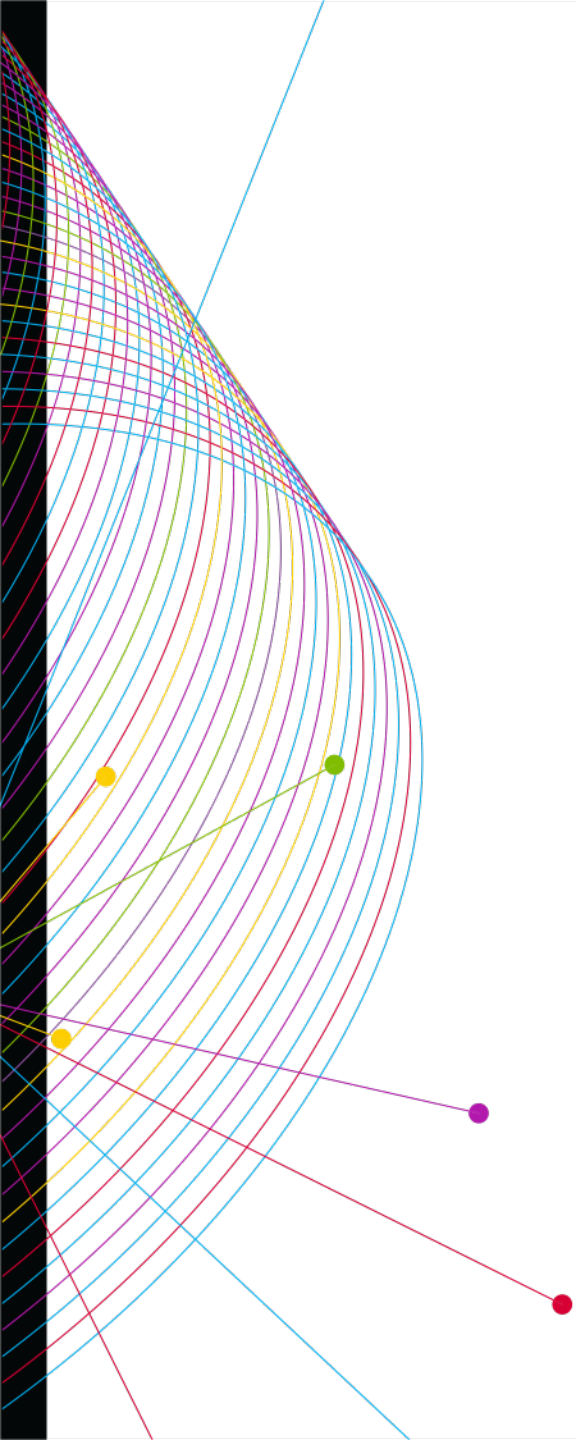
Weighting

Results were weighted at a total level, with each NSO contributing equally to the overall result. When the results in the report are broken down by subgroup (e.g. region or tenure) the NSOs will not be contributing equally due to variations in subgroup composition within each NSO. The weight factors applied to each NSO in 2016/17 and 2015 are as per the table below:

NSO	Weight Factor 2016/17	Weight Factor 2015
Sport A	1.313064	-
Sport B	1.403669	0.832665
Sport C	0.810595	-
Sport D	0.311245	1.923611
Sport E	7.022192	-
Sport F	0.428827	-
Sport G	1.592977	-
Sport H	9.457934	2.473214
Sport I	1.337037	-
Sport J	8.085489	-
Sport K	-	0.533376

FIELDWORK BREAKDOWN

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
27 FEB	28 FEB	1 MAR	2 MAR	3 MAR	4 MAR	5 MAR
			NIELSEN PILOT	Sport C LAUNCH Sport E LAUNCH		
			FIELD START	FIELDWORK		
6 MAR	7 MAR	8 MAR	9 MAR	10 MAR	11 MAR	12 MAR
Sport A LAUNCH Sport F LAUNCH Sport I LAUNCH Sport B LAUNCH Sport J LAUNCH						
FIELDWORK						
13 MAR	14 MAR	15 MAR	16 MAR	17 MAR	18 MAR	19 MAR
NIELSEN REMINDER 1	NIELSEN REMINDER 1			NIELSEN REMINDER 2	NIELSEN REMINDER 2	
FIELDWORK						
20 MAR	21 MAR	22 MAR	23 MAR	24 MAR	25 MAR	26 MAR
FIELDWORK		FIELD END				



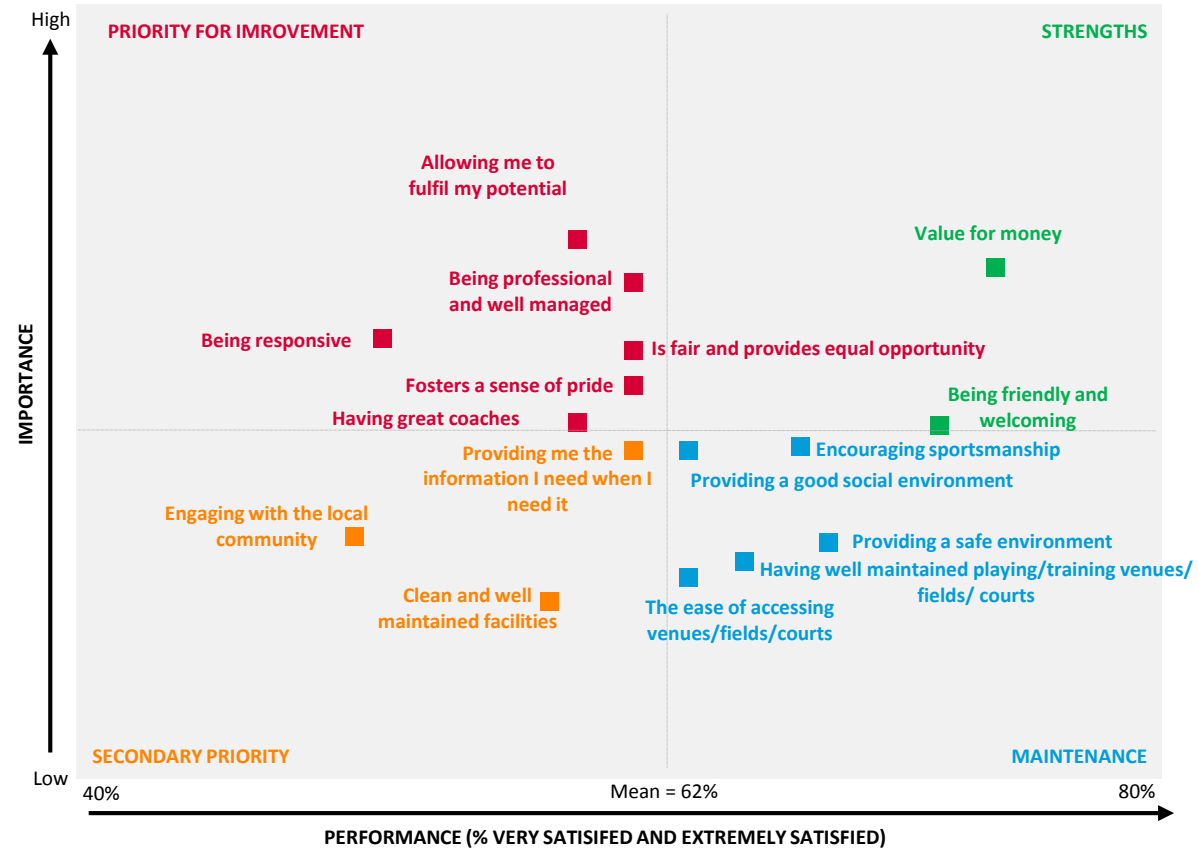
APPENDIX

WHAT IS DRIVING SATISFACTION?

Regression analysis was used to determine the order of importance in driving satisfaction. The three most important factors in driving satisfaction are *allowing me to fulfil my potential, value for money and being professional and well managed*.

Similar to recommendation, *allowing me to fulfil my potential, being professional and well managed, fair and equal opportunities and fostering a sense of pride* are in the priority for improvement quadrant (higher importance, lower performance), along with *being responsive to my needs and requirements and having great coaches*.

Having clean and well maintained facilities, engaging with the local community, and providing me with the information I need when I need it are all secondary priorities (lower importance, lower performance).



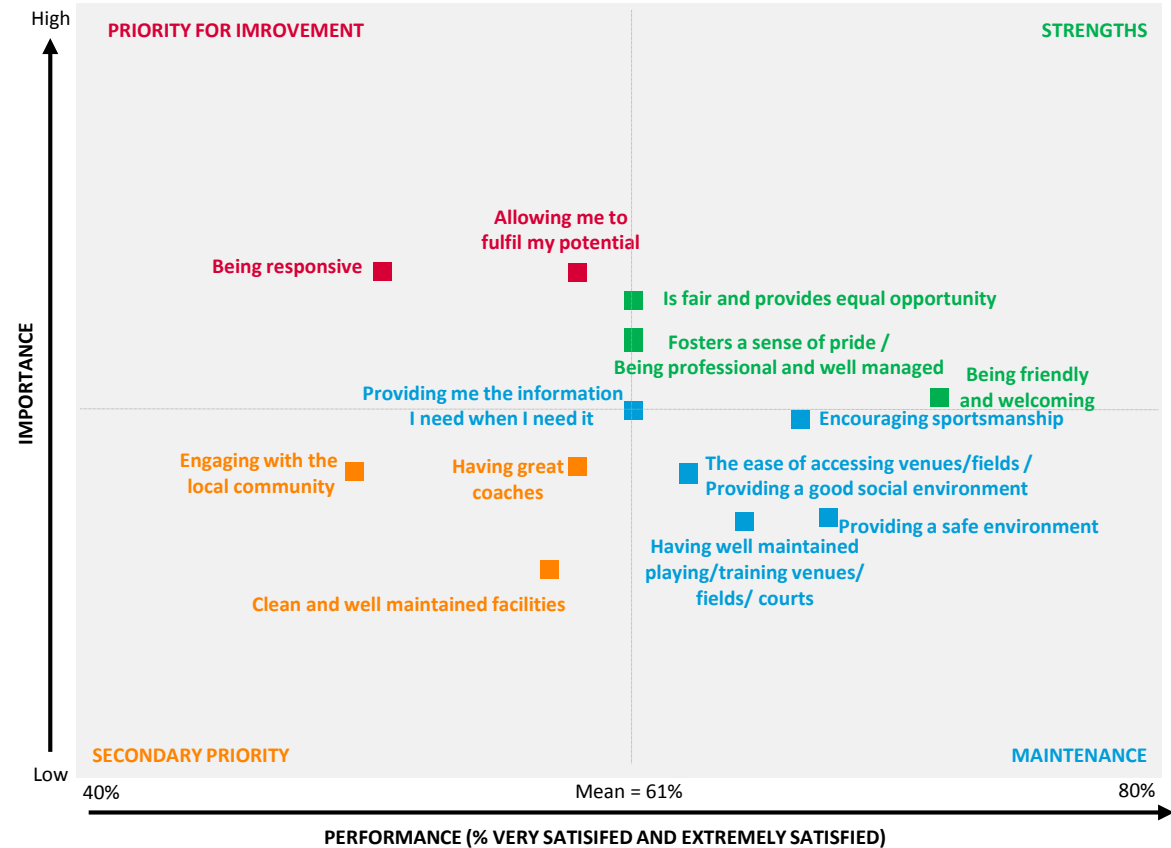
WHAT IS DRIVING VALUE FOR MONEY?

Utilising regression to analyse what is driving value for money.

Allowing me to fulfil my potential and being responsive to my needs and requirements are equally the most important followed by the club being fair and provides equal opportunities for all players.

Both *allowing me to fulfil my potential* and *being responsive to my needs and requirements* are in the priority for improvement quadrant.

Having clean and well maintained facilities, having great coaches and the engaging with the local community are all secondary priorities.





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