



SPORT NZ VOP PROGRAMME 2018/19 RESULTS













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INTRODUCTION

This report looks at the total results from the 2018/2019 Voice-of-Participant (VOP) research to understand the participant's club experience. For more information about the background and objectives of the VOP Programme and this research, please refer to the '[Background, Objectives and Approach](#)' section.

This report includes results from surveying undertaken during winter 2018 and summer 2018/19. The table below shows which National Sporting Organisations (NSOs) took part during these waves.











WINTER 2018					SUMMER 2018/19				
Badminton	Netball	Futsal	Hockey	Rugby League	Rugby Union	Cricket	Golf	Touch Rugby	Tennis
									

Each sport contributes equally to the overall total for the year. Results have not been, and are not able to be, weighted to the New Zealand population. Therefore, the overall total result each year is impacted by which sports have been surveyed that year. This needs to be taken into account when comparing results from 2018/19 with results from previous years. Though some NSOs have participated in the survey across multiple years.

- NSOs that participated in both 2017/18 and 2018/19 include New Zealand Cricket, Badminton New Zealand, New Zealand Rugby and New Zealand Rugby League.
- NSOs that participated only in 2016/17 include New Zealand Football, Basketball New Zealand, Softball New Zealand, Surf Life Saving New Zealand, Waka Ama New Zealand.

Participants of each NSO were given the opportunity to participate via a direct email (if available) or via an open link communicated by Nielsen and/or the NSO. In 2018/19, there was a 61%/39% player/parent split. That is; 61% of all respondents were players responding from their own perspective and 39% were a parent or guardian of a child who plays at or belongs to a club. This proportion of players in 2018/19 is similar to that in 2017/18 where 60% of the sample was players and 40% was parents.

COMPARISON OF DIFFERENT SPORTS

WINTER 2018					SUMMER 2018/19				
Badminton	Netball	Futsal	Hockey	Rugby League	Rugby Union	Cricket	Golf	Touch Rugby	Tennis
									

There are valuable learnings that can be shared between sports, particularly in areas they perform well on. Likewise within sports, different regions or clubs can be used to illustrate best practices.

However, it is important to note that each sport operates in a slightly different context. This is similar to other types of customer experience research where some regions or some groups within a company may operate differently but have shared performance objectives. The ultimate goal is to improve the experience for participants regardless of their touchpoints or dealings.

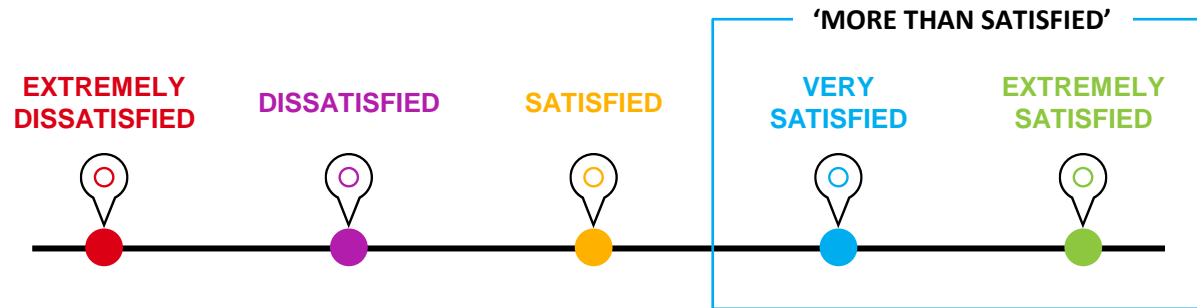
Areas where one sport is performing lower than other sports indicate that improvement may be needed but exactly how that sport drives improvement may need to be tailored. In addition, if other sports are achieving better results, it shows that a positive experience is possible. There are a multitude of options available to both adults and children in the sport and recreation space, so it is a very competitive market – therefore unwittingly, comparisons will be made by potential members.

Below is a brief summary of the key aspects that differ by sport in the context of this research:

- For most of the NSOs included in this research, the survey looks at their 'club' experience, however Netball, Futsal, Badminton and Touch are structured slightly differently. Netball and Futsal focuses on the 'centre' they belong to instead of 'club'. Badminton has a mixture of club, association and 'event only' players. Touch focuses on the 'module' they belong to instead of 'club'.
- Badminton also has a high number of casual players (12%) who were included in the survey which other sports don't have.
- Demographics differences, particularly the proportion of children vs. adults, as needs and expectations can differ between different groups.

SATISFACTION SCALE USED

When level of satisfaction is referenced in the report (i.e. the percentage who are 'more than satisfied'), the top two results ('very satisfied' or 'extremely satisfied') of a positively skewed satisfaction scale are used (shown below).



Positively skewed scales are used because the neutral ratings are divided between dissatisfaction and satisfaction (as opposed to a neutral mid point in a balanced scale). This gives the opportunity for some of the 'very satisfied' to be 'delighted', allowing for more variation/greater discrimination compared with 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.

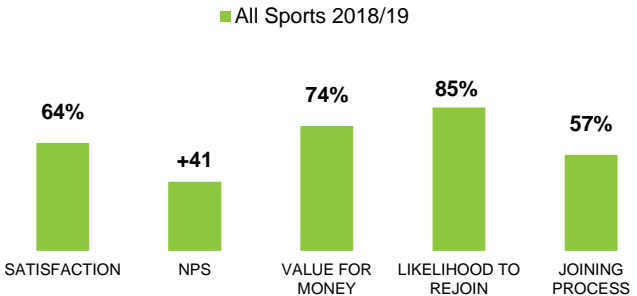
Finally, in a competitive world today, is good...good enough? Good (or just satisfied) does not necessarily build strong relationships. We want members to rate their experience more than just satisfied, so they are real advocates and positively endorse their club and sport.

SNAPSHOT OF PARTICIPANTS' EXPERIENCES

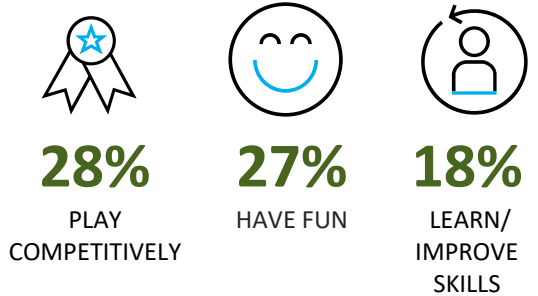
SAMPLE OVERVIEW

2018/19 participants: n=30,081
 n= 17,990 players (61%)
 n= 12,091 parents (39%)

KEY METRICS



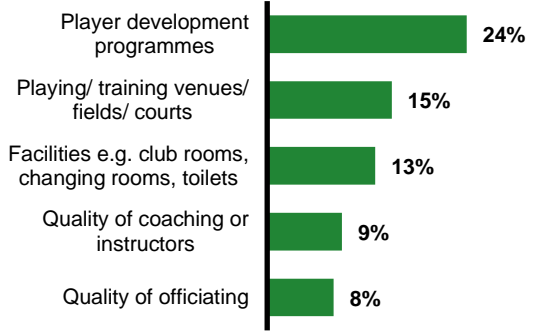
REASONS FOR BELONGING (TOP 3)



MOST IMPORTANT DRIVERS

- 1** VALUE FOR MONEY
74% very/extremely satisfied
- 2** ALLOWING ME TO FULFIL MY POTENTIAL
59% very/extremely satisfied
- 3** BEING PROFESSIONAL AND WELL MANAGED
63% very/extremely satisfied

ONE ASPECT YOU WOULD IMPROVE (IF FEES INCREASED)



EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
KEY METRICS	SATISFACTION	Two-thirds (64%) of respondents are very or extremely satisfied with their overall experience of playing for their club.
	NPS	More than half are 'promoters' of their club (i.e. highly likely to recommend), with one in ten (15%) being considered a 'detractor'.
	VALUE FOR MONEY	Three-quarters of respondents perceive they are getting value for money from their club.
	LIKELIHOOD TO REJOIN	Four in five members indicate they are likely or very likely to re-join their current club next season. All sports sit close to this score.
DRIVERS OF EXPERIENCE	KEY DRIVERS	<p>The drivers most closely linked with recommending one's club are:</p> <ol style="list-style-type: none"> <i>Value for money</i> <i>Allowing me to fulfil my potential</i> <i>Being professional and well managed</i> <p><i>Being friendly and welcoming</i> is the highest performing driver, with three-quarters being very or extremely satisfied with this aspect. <i>Having experienced/qualified officials available when I compete</i> is the lowest scoring driver, with just under a half being very or extremely satisfied with this aspect.</p> <p>Parents score significantly higher in a number of drivers, with the biggest differences compared with players being:</p> <ul style="list-style-type: none"> <i>The ease of accessing the club's venues/ fields/ courts for training or casual playing</i> (65% parents cf. 58% players) <i>Being friendly and welcoming</i> (75% parents cf. 69% players) <i>The social environment at the club</i> (66% parents cf. 61% players).

EXECUTIVE SUMMARY

KEY RESULTS

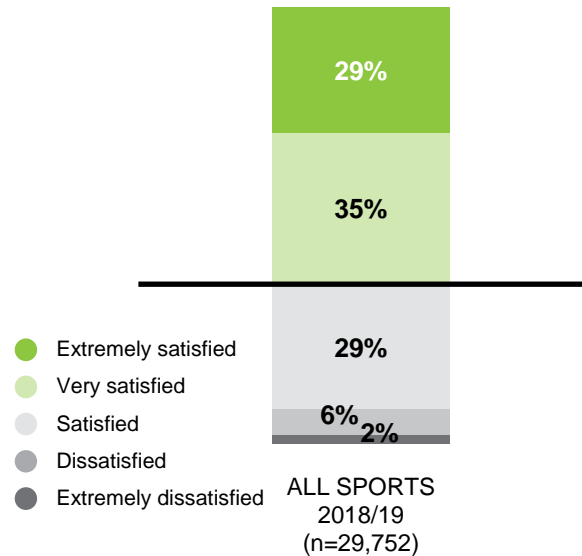
<p>DESIRED IMPROVEMENTS</p>	<p>If membership fees increased, a quarter of respondents would want their club to invest in improving <i>player development programmes</i>. This is the number one area for improvement in eight out of ten sports. Parents of players were significantly more likely than players to choose <i>player development programmes</i>.</p> <p><i>Playing/training venues</i> and <i>Facilities</i> were the second and third most popular areas for improvement.</p>
<p>CLUB ENVIRONMENT & INAPPROPRIATE BEHAVIOUR</p>	<p>Club members are generally positive about various aspects of the club environment, with eight or nine in ten agreeing the environment is positive (e.g. supportive and encouraging, emphasis on fun and enjoyment, etc).</p> <p>Just over a third have experienced or witnessed inappropriate behaviour at least occasionally while playing in the last 12 months.</p>
<p>INJURY MANAGEMENT</p>	<p>In the last 12 months, a third of players have been injured while playing or training. Of those who have been injured, half (53%) made an ACC claim for their injury. Respondents were generally satisfied with how their club managed their injury. A third of those injured continued to play after their injury, this was mostly because they <i>wanted to continue playing</i>.</p>
<p>DIFFERENCES ACROSS REGIONS</p>	<p>Levels of satisfaction with overall experience vary across the regions, with Northland, Manawatu and Nelson having lower scores than the 2018/19 total. Northland and Manawatu also have lower scores than they did in 2017/18. However, satisfaction levels in Auckland have increased from 2017/18.</p> <p>NPS has declined for a number of regions from their result in 2017/18. Compared with the total 2018/19 result, Auckland, Manawatu, Nelson and Canterbury have lower NPS, while Northland, Bay of Plenty, Gisborne and Wellington-Wairarapa have a significantly higher NPS.</p> <p>Perceived value for money is significantly lower in Manawatu and Whanganui, and significantly higher in Bay of Plenty, Taranaki and Wellington-Wairarapa.</p> <p>Likelihood to rejoin has significantly increased for Auckland, Bay of Plenty, Gisborne, Wellington-Wairarapa and Otago, compared with 2017/18 results.</p> <p>Auckland region has made the most improvement since 2017/18, with a significantly higher score compared with their 2017/18 result in four of the five key metrics.</p>

KEY RESULTS

TWO-THIRDS ARE VERY OR EXTREMELY SATISFIED WITH THEIR OVERALL CLUB EXPERIENCE

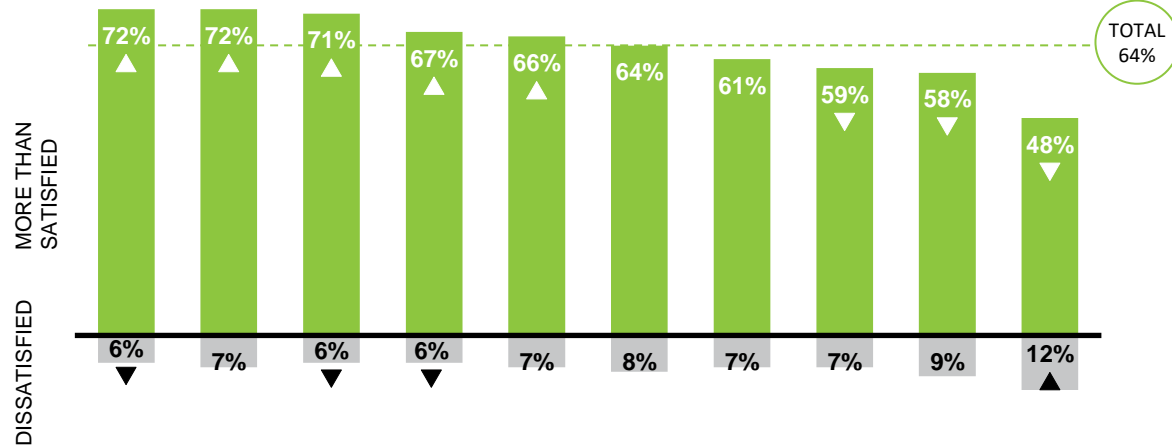
Sports who participated in the VOP research programme in Winter 2018/ Summer 2019 had very/extremely satisfied scores that ranged from 48% to 72%. In only one sport were respondents significantly more likely to be dissatisfied than the total (12% cf. 8%).

VERY / EXTREMELY SATISFIED **64%**



- Extremely satisfied
- Very satisfied
- Satisfied
- Dissatisfied
- Extremely dissatisfied

SATISFACTION WITH OVERALL EXPERIENCE – BY SPORT



Those **significantly more** likely to be more than satisfied are:

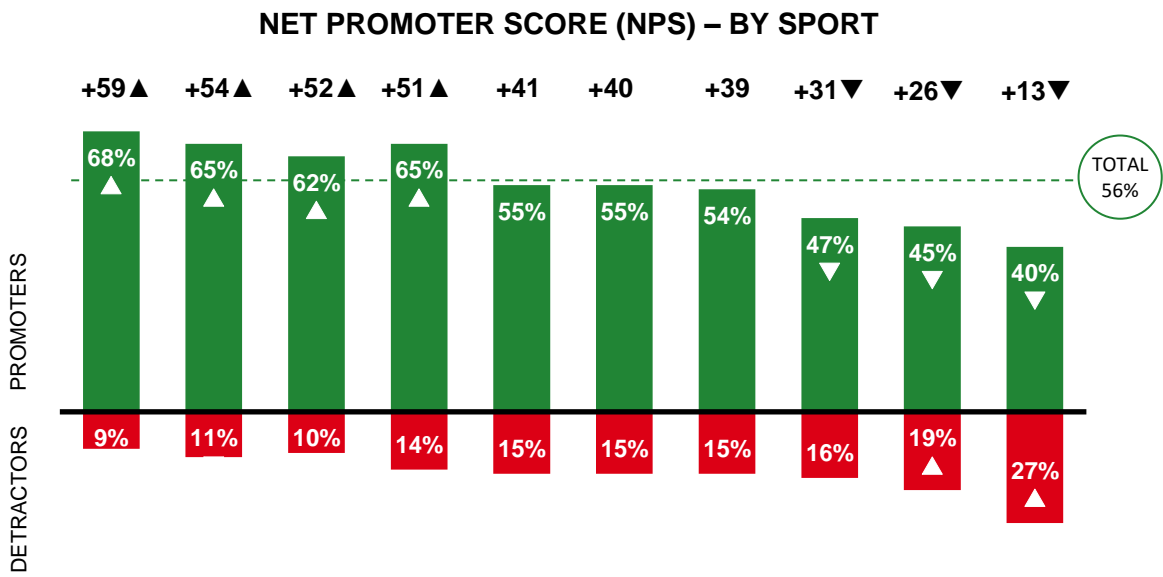
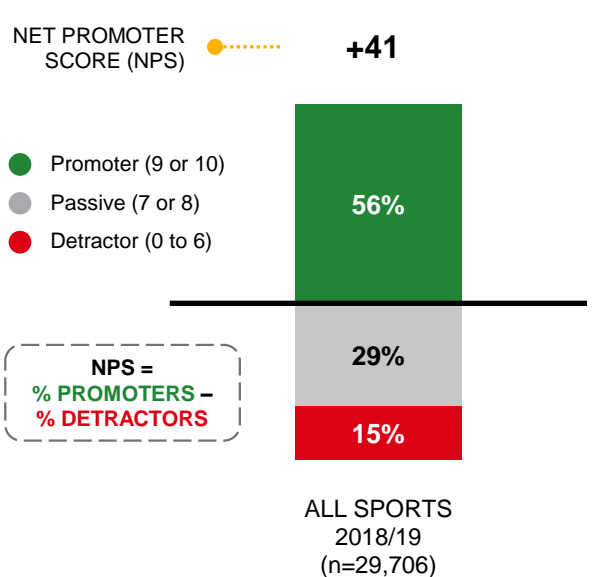
- ▶ Those from the Bay of Plenty (67% cf. 64%), Canterbury (65%)
- ▶ Those aged 5-12 years (67%).

Those **significantly less** likely to be more than satisfied are:

- ▶ Young adults (19-34 years) (57% cf. 64%) or secondary school age (13-18 years) (60%)
- ▶ Of Asian or Indian ethnicity (58%) or Pasifika ethnicity (60%)
- ▶ From Manawatu (58%), Nelson (58%) or Northland (60%)
- ▶ Females (60%).

THREE IN FIVE RESPONDENTS ARE HIGHLY LIKELY TO RECOMMEND THEIR CLUB

More than one in ten (15%) are detractors (unlikely to recommend their club). The likelihood to recommend their club varies greatly across the sports, with NPS' ranging from +13 to +59.



Those **significantly more likely to be promoters** are:

- ▶ Those from Northland (62% cf. 56%), Bay of Plenty (63%)
- ▶ Males (57%)
- ▶ Older adults (35+ years) (62%)
- ▶ Those of Pasifika ethnicity (59%)
- ▶ Players (57%).

Those **significantly more likely to be detractors** are:

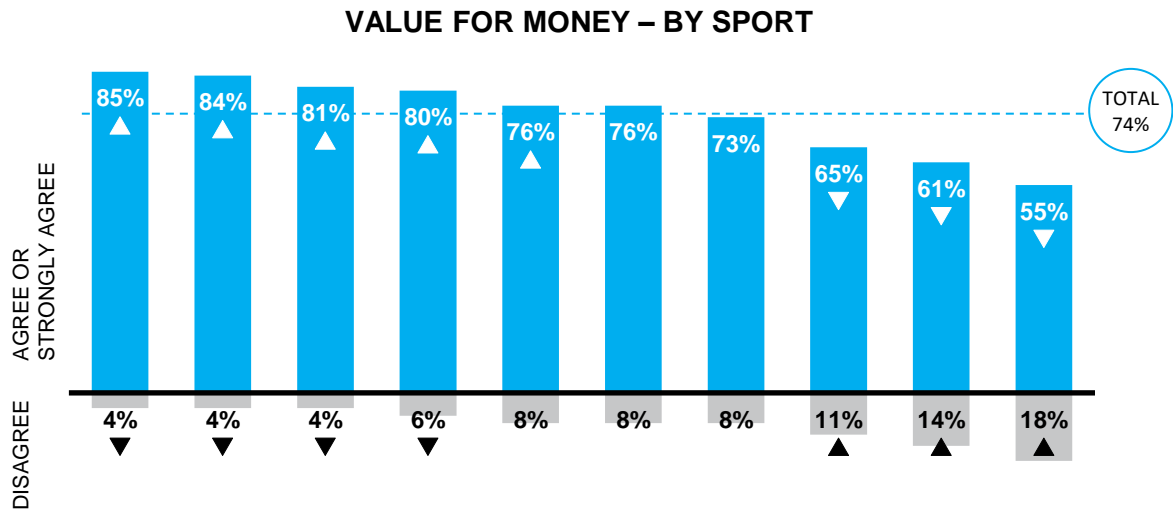
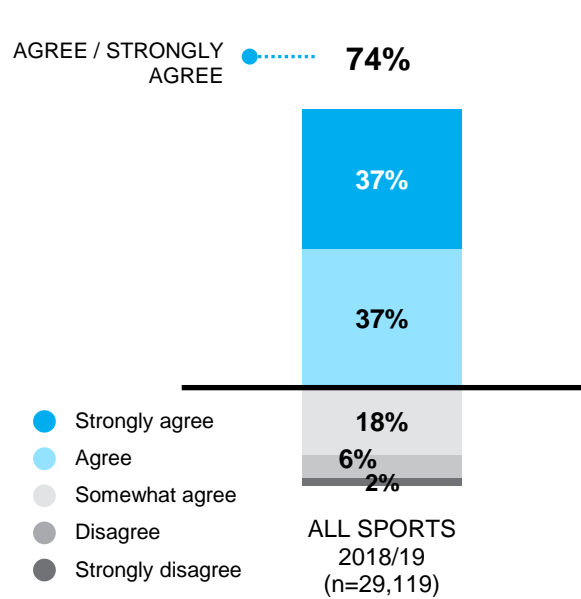
- ▶ Females (17% cf. 15%)
- ▶ Secondary school age (13-18 years) (18%) or young adults (19-34 years) (18%)
- ▶ Those of Maori (18%) and Indian ethnicity (18%)
- ▶ Parents (16%).

Base: All respondents (Excluding Don't know/not applicable) (n=29,706)

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?

THREE-QUARTERS OF RESPONDENTS PERCEIVE VALUE FOR MONEY FROM THEIR CLUB

There is large variation across the ten sports in the proportion who agree they receive value for money (ranging from 55% to 85%).



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

- ▶ Those from Taranaki (82% cf. 74%), Bay of Plenty (79%) or Wellington-Wairarapa (76%) regions
- ▶ Males (77%)
- ▶ Primary age (5-12 years) (77%), Older adults (35+ years) (76%)
- ▶ Those of European ethnicity (75%)
- ▶ Parents (75%).

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

- ▶ Those from Whanganui (59% cf. 74%), Manawatu (65%) and Nelson (66%)
- ▶ Females (68%)
- ▶ Secondary school age (13-18 years) (70%), young adults (19-34 years) (63%)
- ▶ Those of Maori (70%) and Pasifika ethnicity (70%)
- ▶ Players (73%).

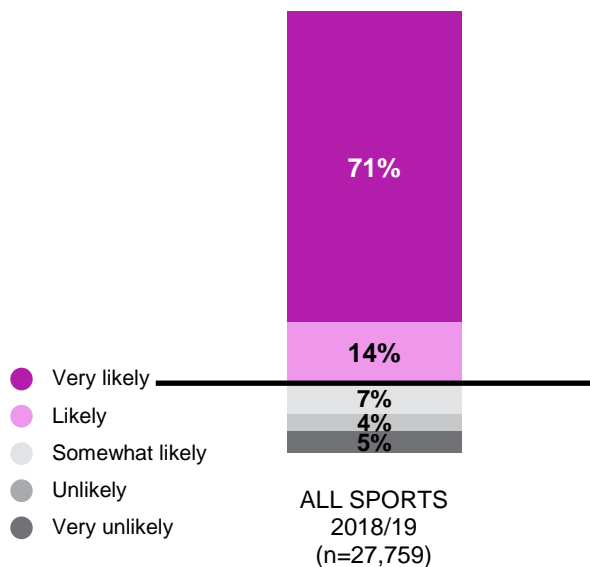
Base: All respondents (Excluding Don't know/not applicable) (n=29,119)

Q11. To what extent do you agree or disagree with the following... 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

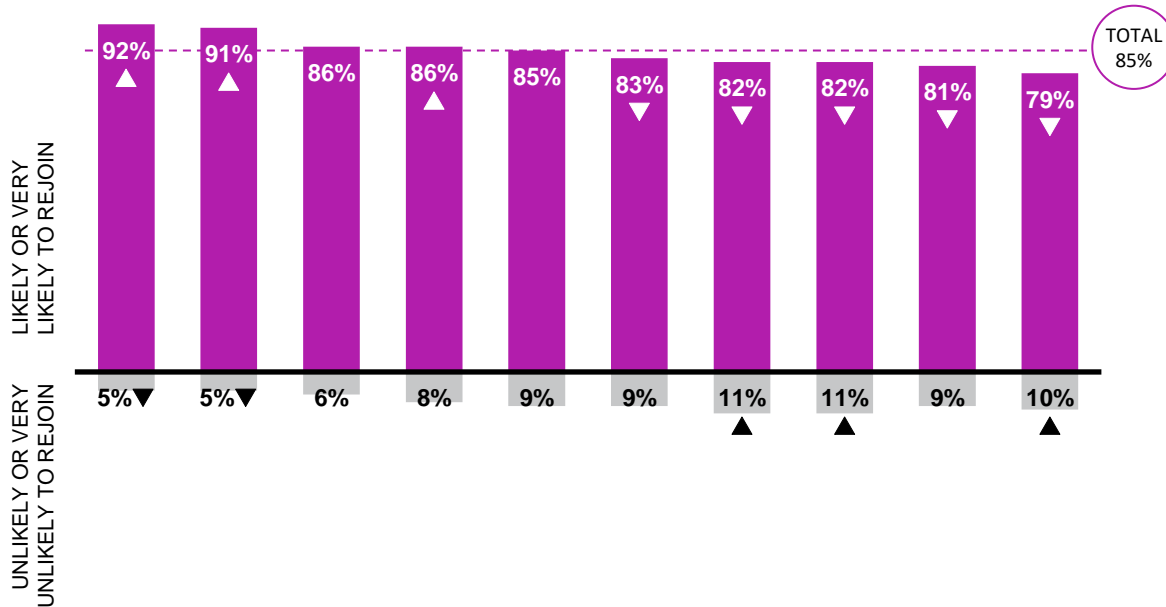
FOUR IN FIVE MEMBERS ARE LIKELY TO REJOIN THEIR CURRENT CLUB NEXT SEASON

The range across sports is much smaller for likelihood to rejoin next season than the other key metrics. The proportion of respondents saying they are likely or very likely to rejoin ranging from 79% to 92%.

LIKELY / VERY LIKELY TO REJOIN **85%**



LIKELIHOOD TO REJOIN – BY SPORT



Those **significantly more** likely to rejoin are:

- ▶ Those from Bay of Plenty (89% cf. 85%)
- ▶ Older adults (35+ years) (89%)
- ▶ Those of European ethnicity (86%)
- ▶ Players (86%).

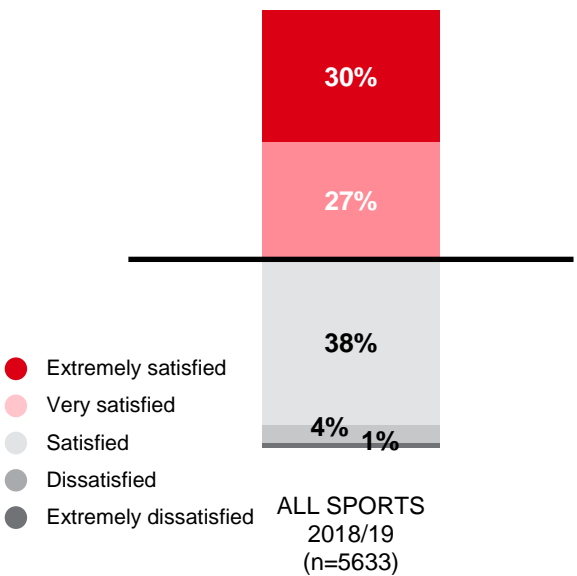
Those **significantly less** likely to rejoin are:

- ▶ Those from Nelson (79% cf. 85%) and Canterbury (83%)
- ▶ Females (83%)
- ▶ Secondary school age (13-18 years) (80%), young adults (19-34 years) (80%)
- ▶ Those of Maori (82%) and Pasifika ethnicity (82%)
- ▶ Parents (83%).

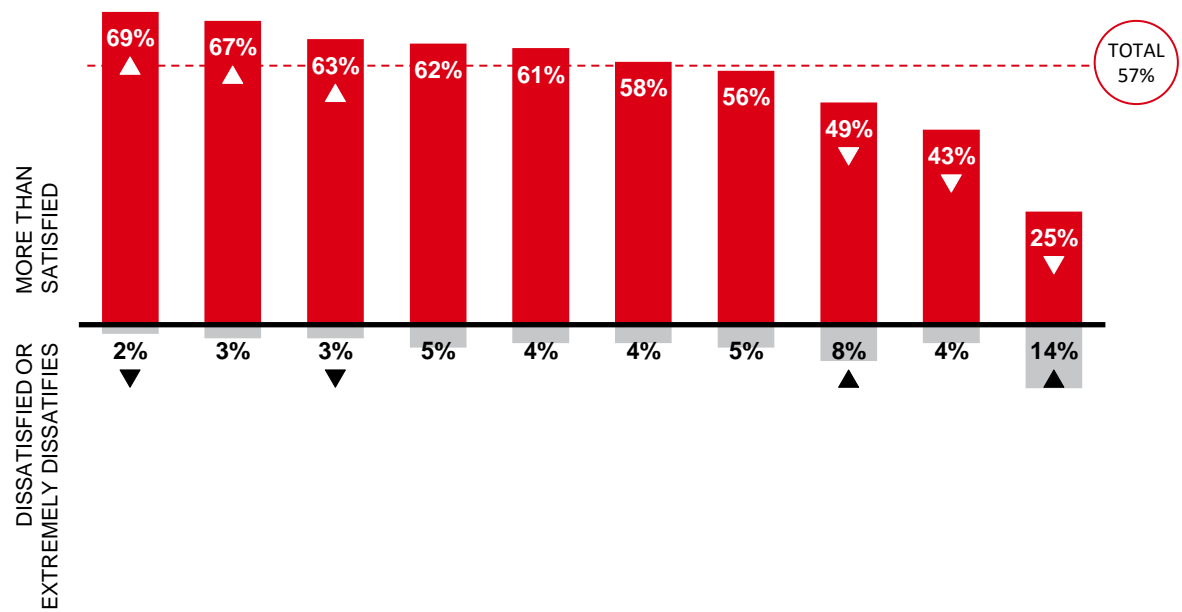
THREE IN FIVE ARE MORE THAN SATISFIED WITH THE OVERALL JOINING PROCESS

For most sports, around six in ten new members are very or extremely satisfied with the joining process experience. However, there are three sports where less than half are more than satisfied with the overall joining process.

VERY / EXTREMELY SATISFIED **57%**



SATISFACTION WITH JOINING PROCESS – BY SPORT



Those **significantly more** likely to be more than satisfied with the overall joining process are:

- ▶ Those from Marlborough (80% cf. 57%) and Wellington-Wairarapa (63%)
- ▶ Older adults (35+ years) (62%)
- ▶ Players (62%).

Those **significantly less** likely to be more than satisfied with the overall joining process are:

- ▶ Those from Otago (49% cf. 57%)
- ▶ Primary/ intermediate school age (5-12 years) (53%)
- ▶ Parents (53%).

Base: All respondents who have been members for less than one year (Excluding Don't know/not applicable) (n=5633)
 Q20. Thinking about the process you/you and your child went through when you/your child joined your/their club. How satisfied are you with your/their club on the following... the overall joining process

OVERALL, THREE IN TEN BELONG TO A CLUB TO PLAY COMPETITIVELY

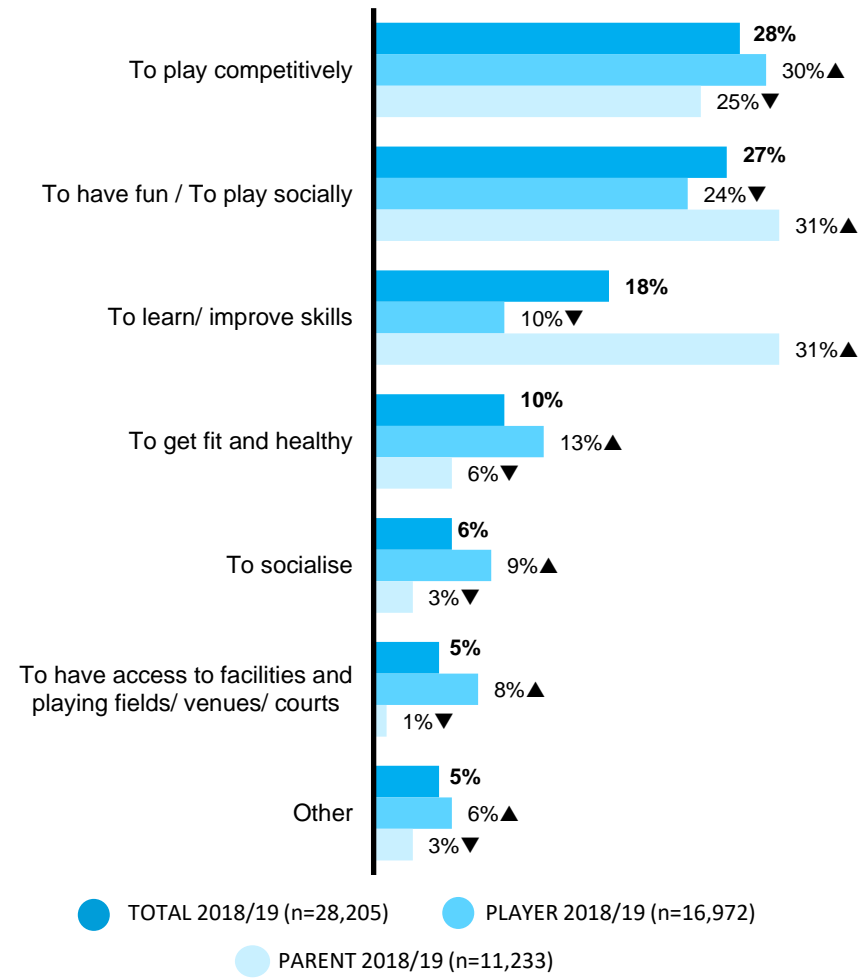
The top two reasons parents say their child belongs to a club are *to have fun* (31%) and *to learn/improve skills* (31%). Whereas for players, the top reason is *to play competitively* (30%).

Interestingly, females are more likely to say they belong *to play competitively* (32%) compared to males (26%) and are less likely to say it is *to have fun/socialise* (25% females cf. 28% males).

For secondary school aged children nearly half belong *to play competitively* (49%) and then a quarter (24%) *to learn/improve a skill*. For those aged 19-34 years it is about *playing competitively* (39%) and *having fun/socialising* (26%), likewise older adults belong *to play competitively* (24%) and *to have fun/ socialise* (24%).

For those of Māori, Pasifika and Indian ethnicities there is a greater focus *to learn/improve skills* (24%, 32% and 23% respectively cf. 18% total).

Those of Pasifika and Indian and Asian ethnicities are also more likely than the total to say they belong *to get fit/ healthy* (15% and 16% cf. 10%).



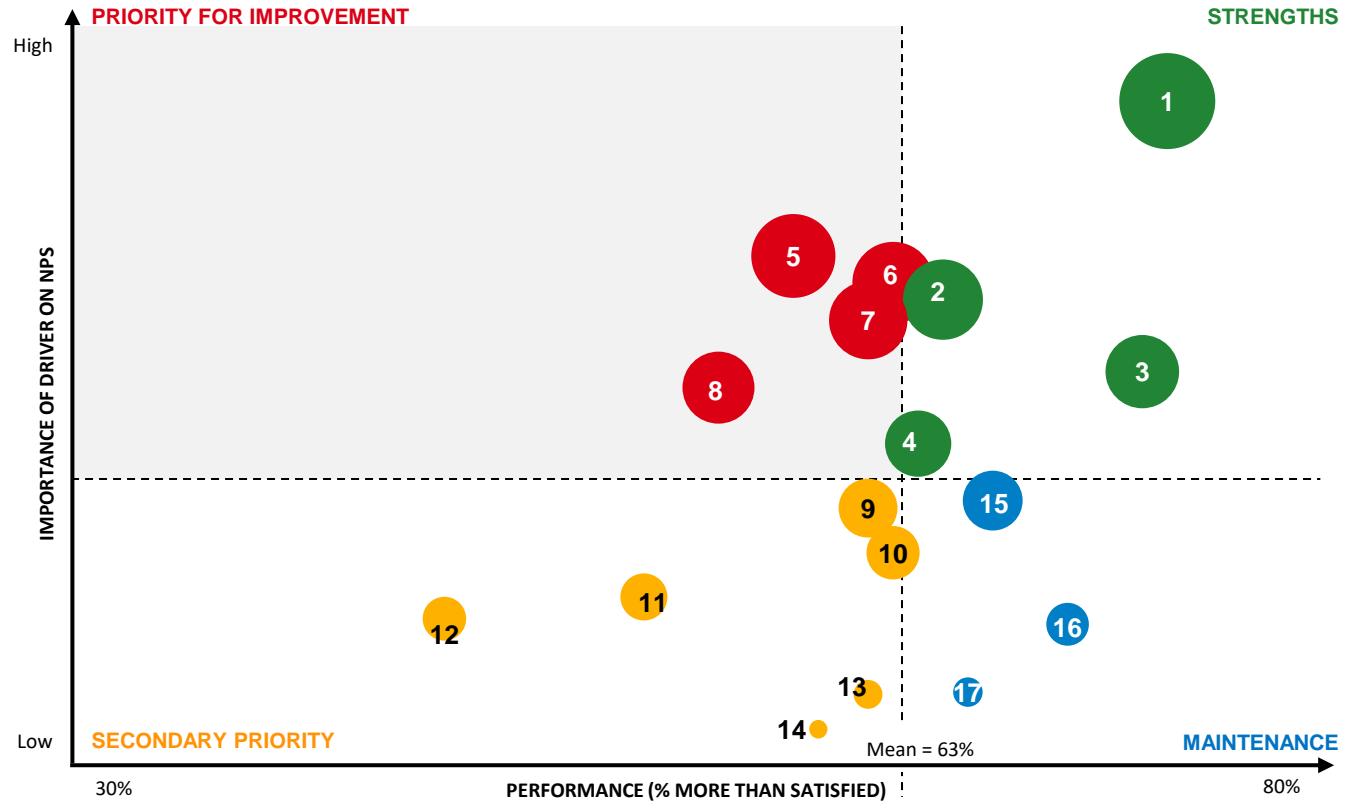
WHAT IS CAUSING THESE RATINGS?

DRIVERS OF RECOMMENDATION (NPS)

For 2018/19 participating sports, the top three drivers of recommendation (NPS) are:

- Value for money
- Allowing me to fulfil my potential
- Being professional and well managed

Allowing me to fulfil my potential and being professional and well managed are the drivers where emphasis should be placed, as they are below the average for satisfaction and above average for importance.



- | | | | |
|---|---|---|---|
| <p>STRENGTHS</p> <ul style="list-style-type: none"> 1. Value for money 2. Fostering a sense of pride 3. Being friendly and welcoming 4. The social environment at the club | <p>PRIORITY FOR IMPROVEMENT</p> <ul style="list-style-type: none"> 5. Allowing me to fulfil my potential 6. Being professional and well managed 7. Is fair and provides equal opportunities 8. Being responsive to my/their needs and requirements | <p>SECONDARY PRIORITY</p> <ul style="list-style-type: none"> 9. Providing me the information I need, when I need it 10. The quality of coaches or instructors 11. Engaging with the local community 12. Having qualified/ experienced officials available when I/ they compete 13. The ease of accessing the clubs venues/ fields/ courts for training or casual playing 14. Having clean and well maintained facilities e.g. clubrooms, changing rooms, toilets | <p>MAINTENANCE</p> <ul style="list-style-type: none"> 15. Encouraging good sportsmanship and fair play 16. Providing a safe environment for adults and children 17. Having well maintained playing/ training venues/ fields/ courts |
|---|---|---|---|

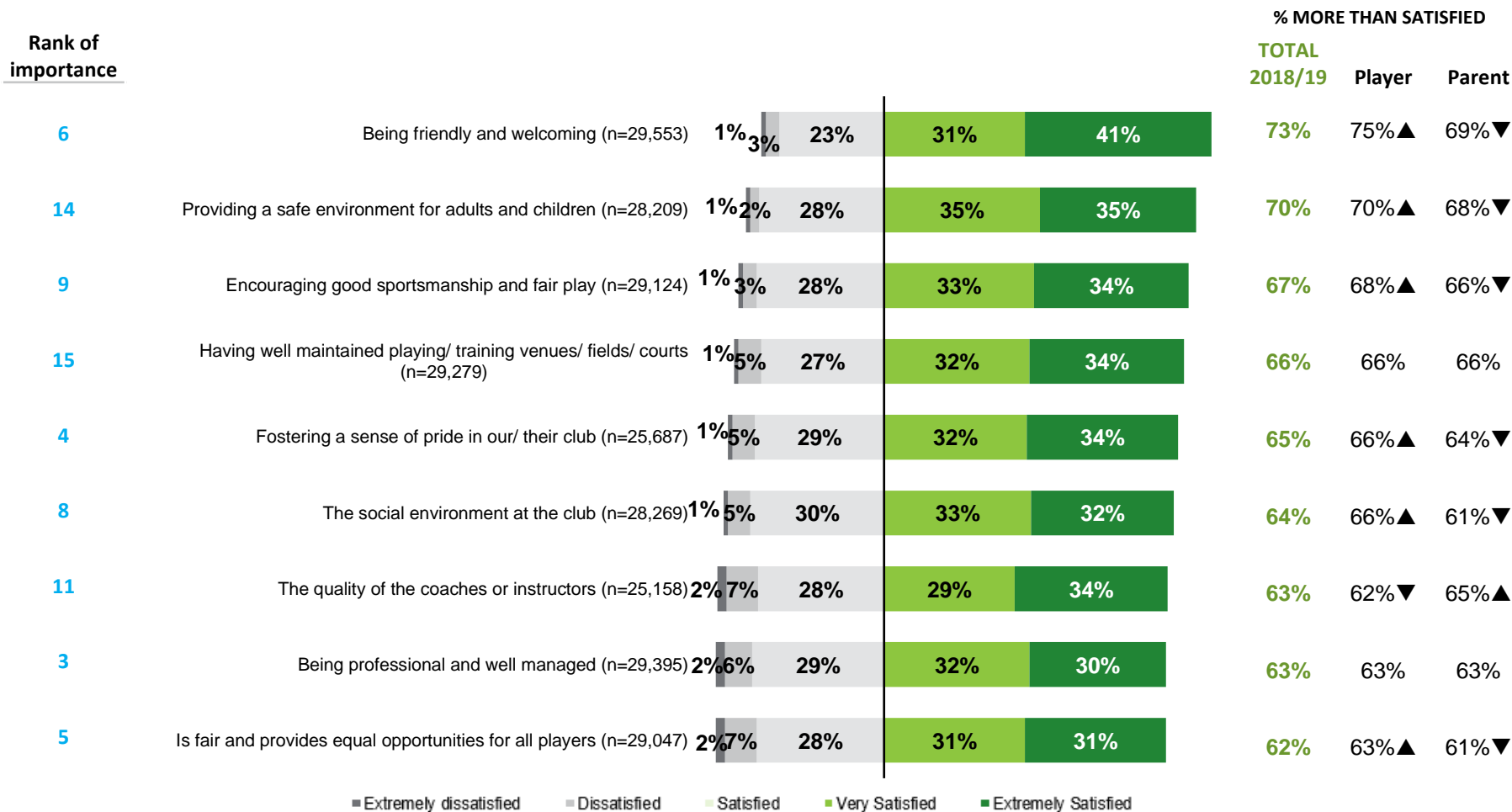
Base: All Respondents (Excluding Don't know/not applicable)

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?

* 2018/19 results only include attributes where nine or more NSOs (out of the 10) were asked.

PERFORMANCE IN DRIVERS OF CLUB EXPERIENCE

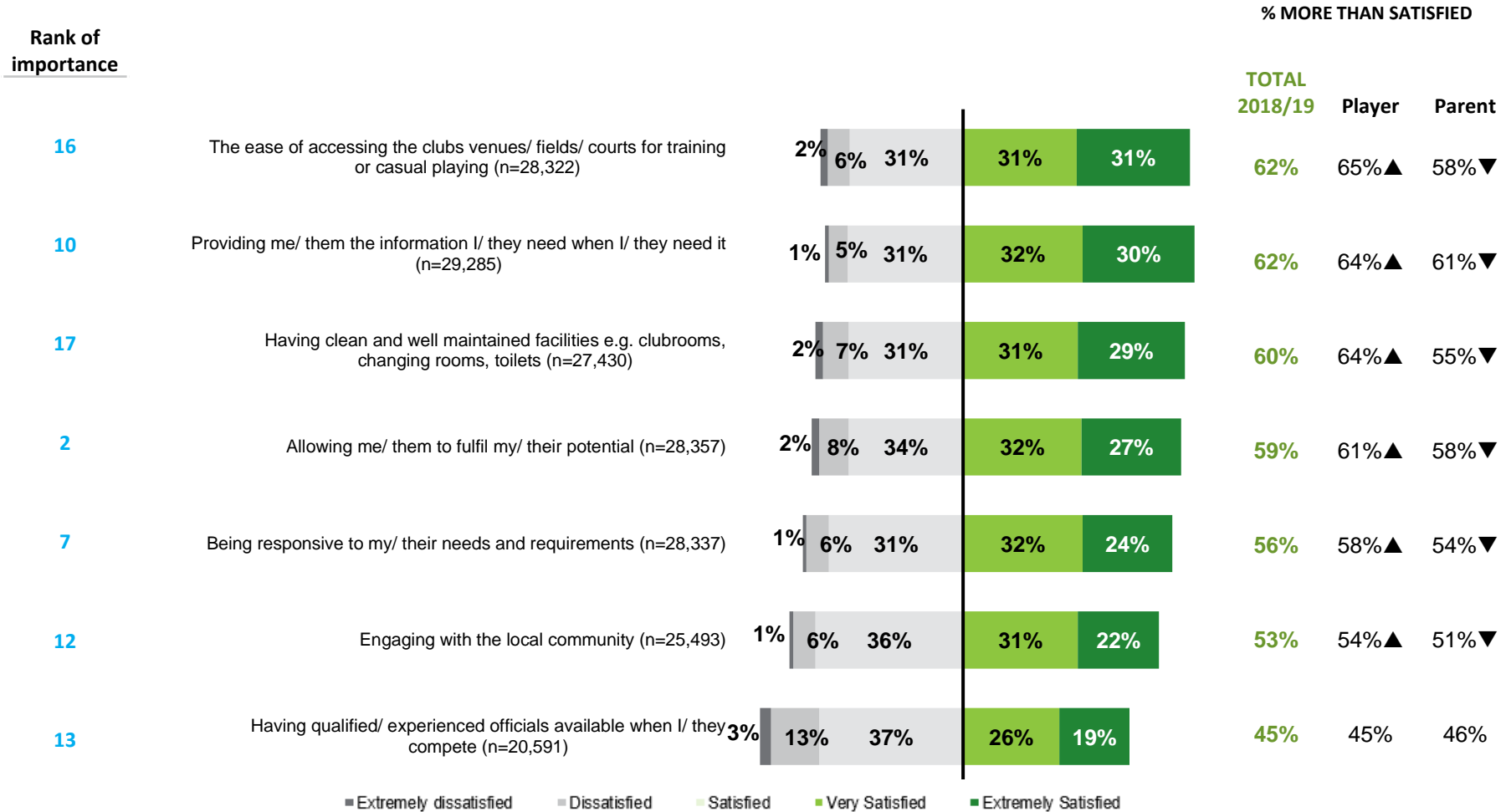
Being friendly and welcoming is the top performing driver in 2018/19, with parents rating this attribute significantly higher (75% cf. 73%). Although this driver is at the top, it is ranked 6th in importance for driving recommendation.



Base: All respondents (Excluding Don't know/not applicable)
 Q10a. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> club on each of the following...
 Q10b. How would you rate your/ your child's overall satisfaction with your/ their sport club on each of the following...

PERFORMANCE IN DRIVERS OF CLUB EXPERIENCE

Parents score significantly higher than players in almost all of the following drivers. *Allowing me to fulfil my potential* is ranked second in importance for driving recommendation, but has a relatively low performance score (59% more than satisfied).



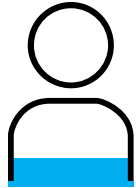
Base: All respondents (Excluding Don't know/not applicable)
 Q10a. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> club on each of the following...
 Q10b. How would you rate your/ your child's overall satisfaction with your/ their sport club on each of the following...

IF MEMBERSHIP FEES INCREASED, A QUARTER OF RESPONDENTS WOULD WANT THEIR CLUB TO INVEST IN *PLAYER DEVELOPMENT PROGRAMMES*

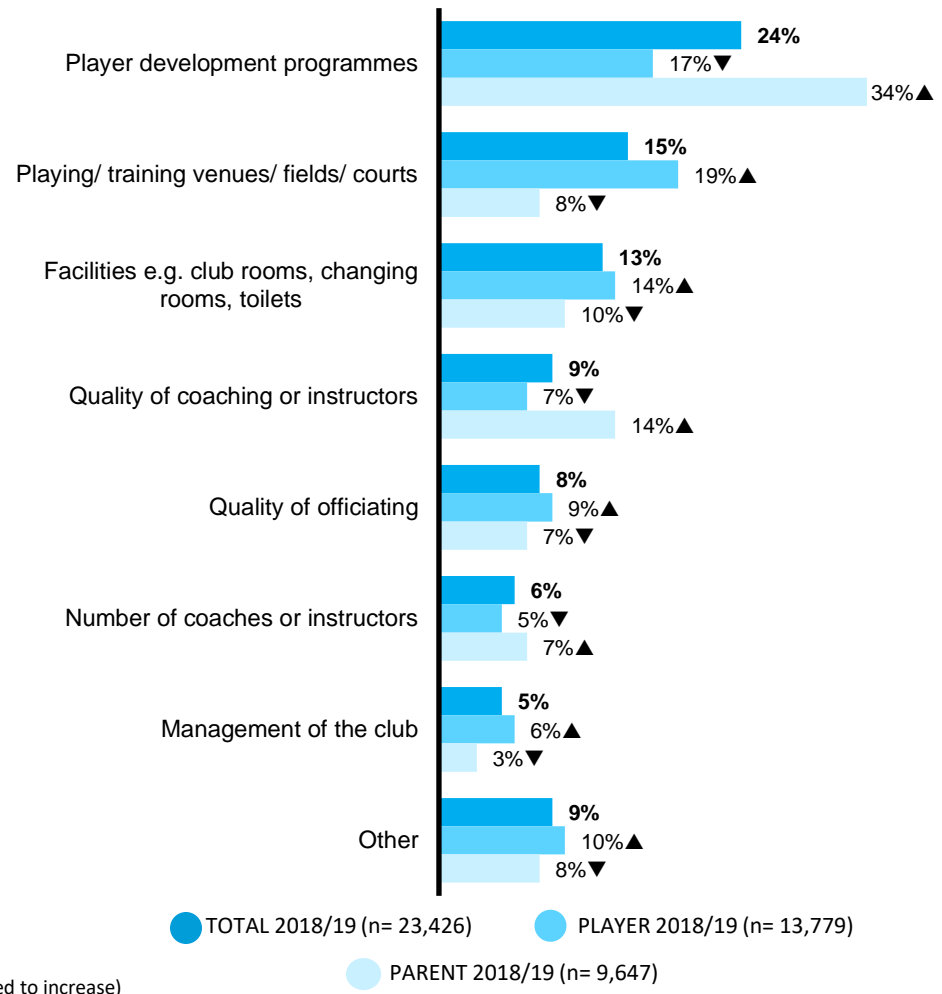
This is followed by *playing/training venues* (15%) and *facilities e.g. club rooms, changing rooms, toilets* (13%).

Parents of players are significantly more likely than players to choose *player development programmes* (34% cf. 17% players).

Young people aged 5-18 years (parents and players) are significantly more likely to want the focus to be on *player development programmes* (33% cf. 24%), while those aged 19-34 years (18%) and 35+ years (13%) are significantly less likely to choose this option.



14% would not want anything improved if it meant their fees were increased.



Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my feed need to increase)
 Q14. 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?

TOP THREE AREAS FOR IMPROVEMENT BY SPORT

If fees were to increase, respondents of each sport would want their club to focus on improvement to the following:

	SPORT A	SPORT B	SPORT C	SPORT D	SPORT E	SPORT F	SPORT G	SPORT H	SPORT I	SPORT J
1	Player development programmes (29%)	Player development programmes (20%)	Player development programmes (24%)	Player development programmes (23%)	Player development programmes (35%)	Player development programmes (31%)	Player development programmes (29%)	Player development programmes (26%)	Playing/ training venues/ fields (35%)	Playing/ training venues/ fields (21%)
2	Facilities e.g. club rooms, changing rooms, toilets (21%)	Quality of officiating (19%)	Playing/ training venues/ fields (18%)	Quality of coaching or instructors (17%)	Quality of officiating (13%)	Facilities e.g. club rooms, changing rooms, toilets (16%)	Playing/ training venues/ fields (15%)	Quality of officiating (16%)	Practice facilities (driving range, chipping and putting area, etc.) (22%)	Facilities e.g. club rooms, changing rooms, toilets (21%)
3	Quality of coaching or instructors (10%)	Playing/ training venues/ fields (12%)	Facilities e.g. club rooms, changing rooms, toilets (14%)	Quality of officiating (13%)	Playing/ training venues/ fields (11%)	Quality of coaching or instructors (11%)	Quality of coaching or instructors (13%)	Quality of coaching or instructors (11%)	Facilities e.g. club rooms, changing rooms, toilets (11%)	Player development programmes (16%)

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my feed need to increase) (n=23,426)

Q14. If your/your child's 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?

Note: Top three areas shown for each NSO

■ / ■ Significantly higher/lower than Total 2018/19

OTHER RESULTS

THE JOINING PROCESS

ALMOST THREE IN FIVE NEW MEMBERS ARE MORE THAN SATISFIED WITH THE JOINING PROCESS

Parents are significantly more likely to be *very or extremely satisfied* than players with all aspects of the joining process, with the exception of *introducing you to existing members and opportunities to meet new members*.

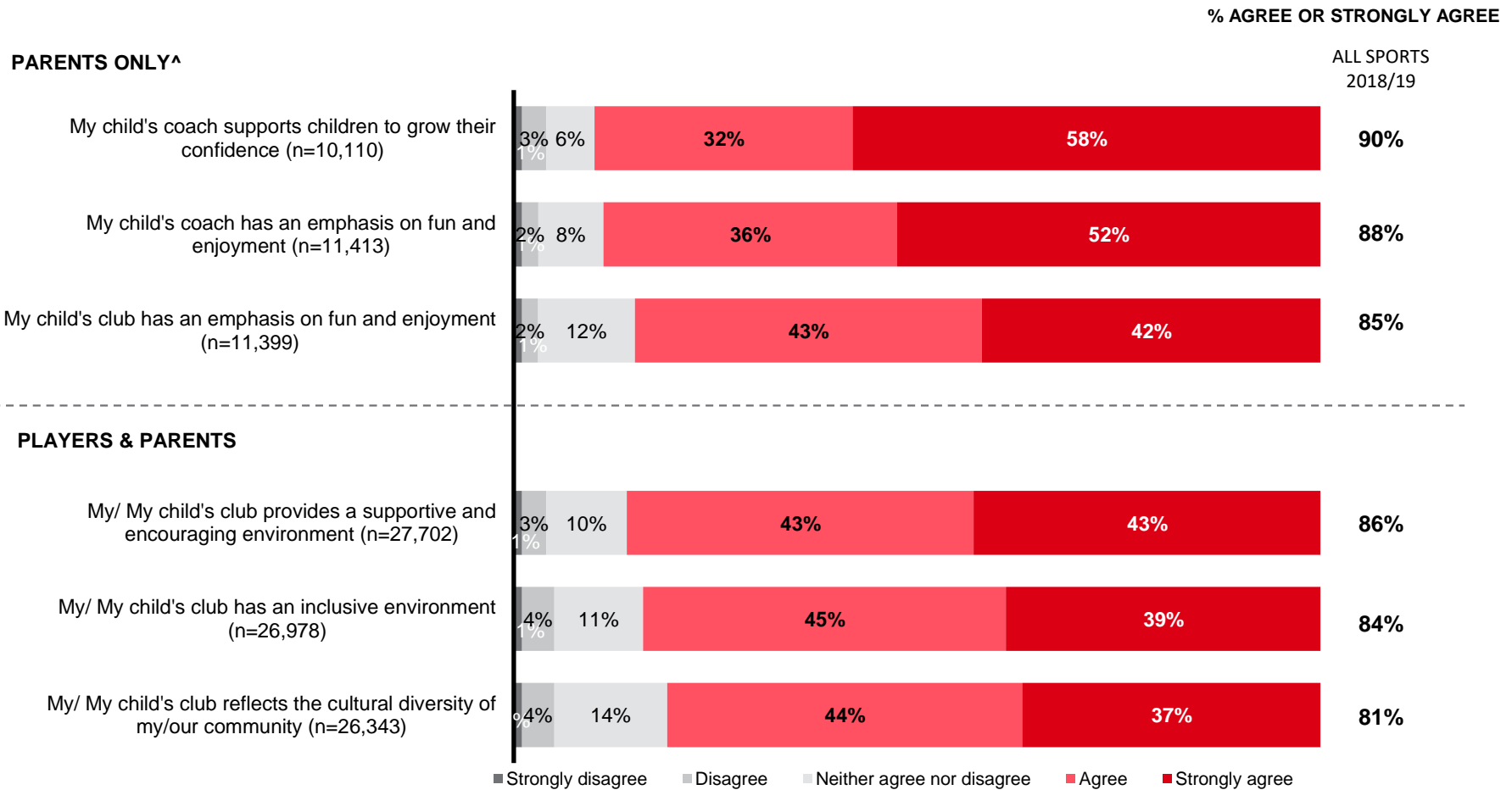


Base: All respondents who have been members for less than one year (Excluding Don't know/not applicable)
 Q20. Thinking about the process you/you and your child went through when you/your child joined your/their club. How satisfied are you with your/their club on the following...(average of four attributes)
 Please refer to the [Appendix](#) for individual NSO results and sub-group differences

CLUB ENVIRONMENT AND INAPPROPRIATE BEHAVIOUR

CLUB ENVIRONMENT

Respondents are generally positive about various aspects of club environment, with around nine in ten agreeing with each of the parent-only statements, and around four in five agreeing with the statements that were asked of everyone.

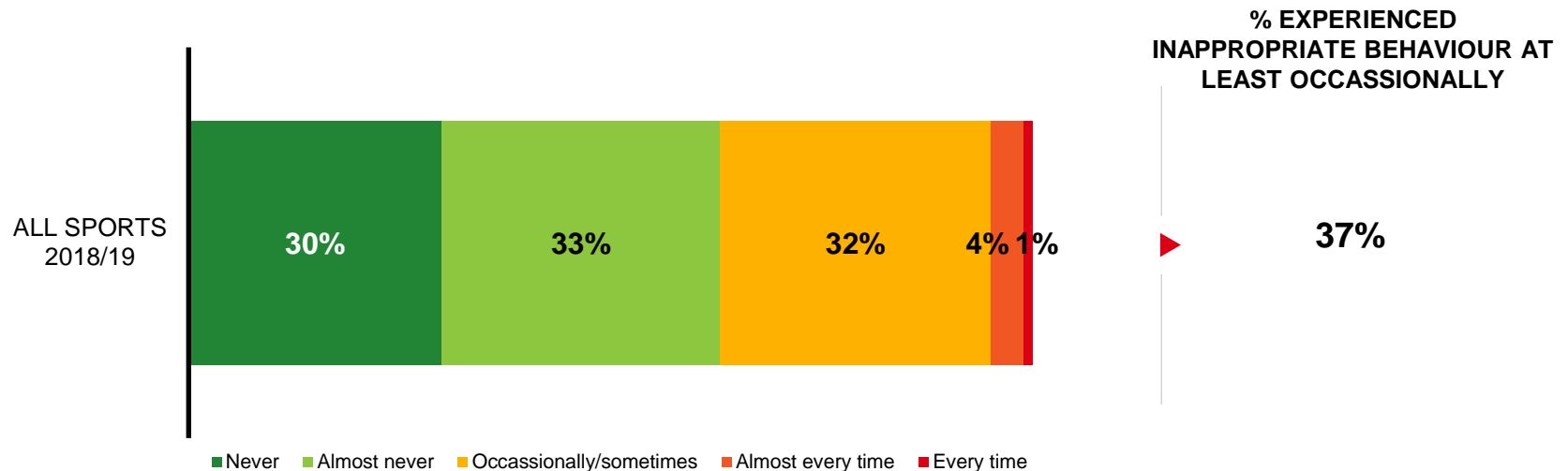


Base: All respondents (Excluding Don't know/not applicable)
Q54. To what extent do you agree or disagree on the following...

[^] Only asked of parents of children participating in <NSO>

FREQUENCY OF INAPPROPRIATE BEHAVIOUR AT A MATCH

Over a third (37%) have experienced or witnessed inappropriate behaviour at least occasionally while playing in the last 12 months.



Those **significantly more** likely to have experienced/witnessed inappropriate behaviour **almost every time/ every time** are:

- ▶ Those whose role at the club is *paid employee* (19% cf. 5%), *official/ referee* (14%), *coach or instructor* (11%), *volunteer* (10%) or *team manager* (9%).

Base: All respondents (Excluding Don't know/not applicable) (n=17,931)

Q51. In the last 12 months, how frequently have you/you or your child witnessed or experienced inappropriate behaviour by a spectator, coach or official while you/your child played?

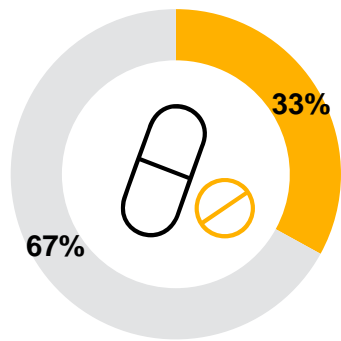
NOTE: 'All Sports 2018/19' refers to average across other sports who included this question. This is not asked of all sports.

INJURY MANAGEMENT

IN THE LAST 12 MONTHS, A THIRD HAVE BEEN INJURED

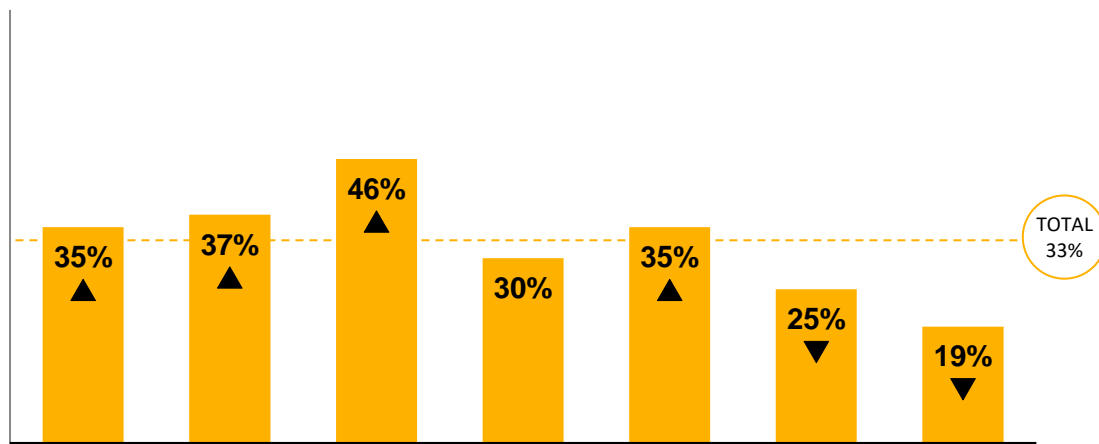
Injury rates vary greatly across sports, with the proportion of those who have been injured in the last 12 months ranging from 19% to 46%. Of those who have been injured, over half (53%) have made an ACC claim for their injury.

RESPONDENTS INJURED IN THE LAST 12 MONTHS



● No or can't remember ● Yes

% INJURED IN THE LAST 12 MONTHS – BY SPORT



Respondents **significantly more** likely to have been injured in the last 12 months are:

- ▶ Young adults (19-34 years) (51% cf. 33%), those of secondary school age (13-18 years) (42%), and those aged 35+ years (40%)
- ▶ Players (45%)
- ▶ From Gisborne (43%), Auckland (36%) and Wellington-Wairarapa (36%) regions.

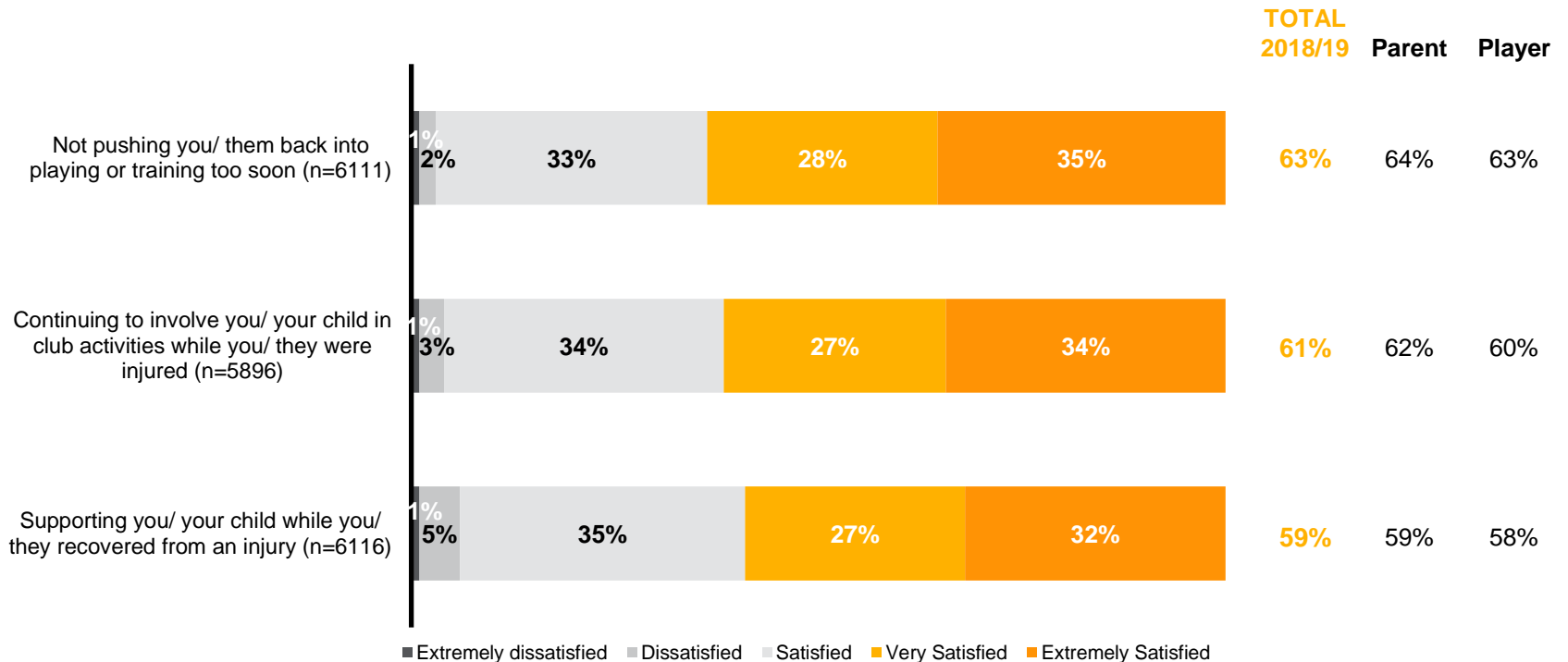
Respondents **significantly less** likely to have been injured in the last 12 months are:

- ▶ Those aged 5-12 years (19% cf. 33%)
- ▶ Parents of players (22%)
- ▶ From Southland (25%), Waikato (29%) and Canterbury (30%) regions.

RESPONDENTS ARE GENERALLY SATISFIED WITH HOW THEIR CLUB MANAGED THEIR INJURY

Those of Indian and Asian ethnicity are less likely to be very or extremely satisfied with *continuing to involve you in club activities while you were injured* (53% cf. 61%).

% MORE THAN SATISFIED



Base: All respondents who have been injured in the last 12 months (Excluding Don't know/can't remember)

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

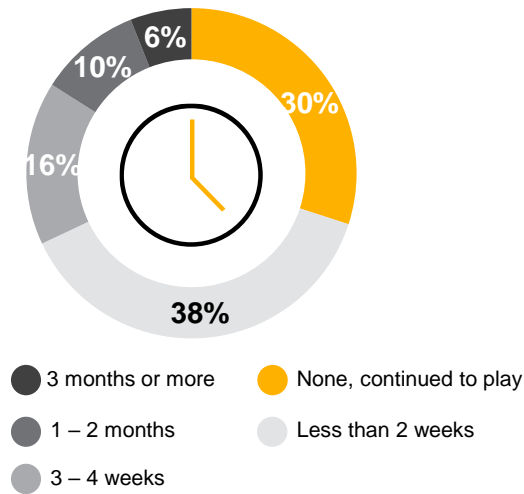
Please refer to the [Appendix](#) for individual NSO results and sub-group differences

▲▼ Significantly higher/lower than Total 2018/19

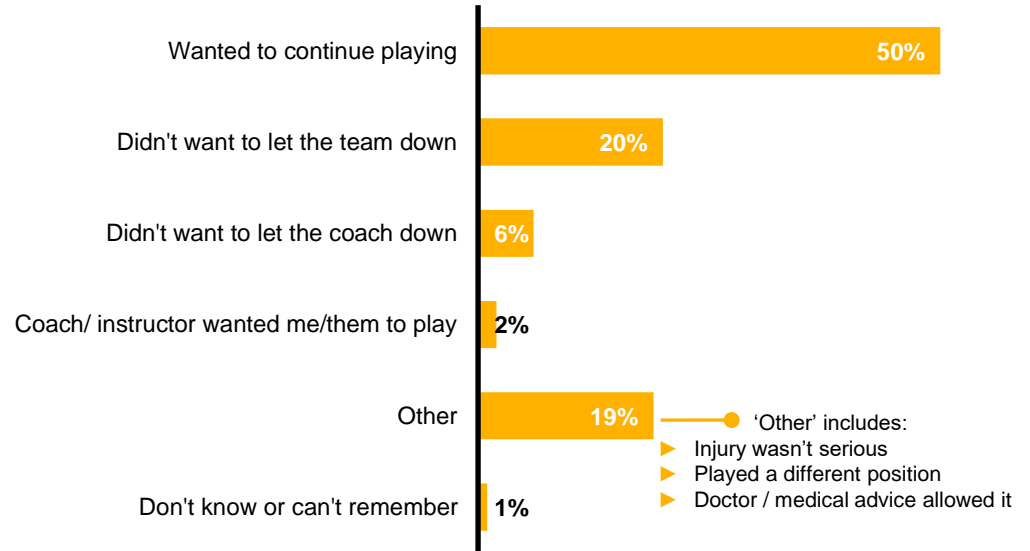
A THIRD DID NOT MISS ANY TIME PLAYING OR TRAINING WHILE THEY WERE INJURED

Half (50%) of those who continued to play while they were injured did so because they *wanted to continue playing*.

TIME MISSED DUE TO INJURY



WHY DID THEY CONTINUE TO PLAY WHILE INJURED



Respondents **significantly more** likely to continue to play while injured are:

- ▶ Aged 5-12 years (47% cf. 30%)
- ▶ Parents of players (38%).

Respondents **significantly less** likely to continue to play while injured are:

- ▶ Young adults (19-24 years) (22% cf. 30%), those of secondary school age (13-18 years) (23%) and those aged 35+ (24%)
- ▶ Of Pasifika ethnicity (23%)
- ▶ Players (25%)
- ▶ From the Auckland (27%) region.

Base: All respondents who have been injured in the last 12 months (Excluding Don't know/not applicable) (n=7,033)
 Q38. In the last 12 months, how much time did you/your child have to take off from playing due to your/their injury?
 Base: All respondents who continued to play even when injured (n=2,157)
 Q39. Why did you/they continue to play while you/they were injured?

DEMOGRAPHIC DIFFERENCES

**CAUTION: RESULTS ARE IMPACTED BY THE SPORTS PLAYED BY EACH
DEMOGRAPHIC SUB-GROUP (I.E. AGE GROUP, GENDER, ETHNICITY)**

EXPERIENCE BY AGE GROUP

KEY MEASURE		Total (n=5,633- 29,752)	Primary/Intermediate (5-12 years) (n=2,793- 10,918)	Secondary (13-18 years) (n=685- 3,729)	Young Adults (19-34 years) (n=952- 4,005)	Older Adults (35+) (n=968- 10,881)
SATISFACTION (% more than satisfied)	2018/19	64%	67%▲	60%▼	57%▼	65%▲
	2017/18	63%	69%	62%	58%	61%
	2016/17	61%	57%	61%	56%	64%
NPS (% promoters less % detractors)	2018/19	+41	+39▼	+29▼	+33▼	+50▲
	2017/18	+44	+49	+35	+40	+48
	2016/17	+40	+24	+27	+36	+51
VALUE FOR MONEY (% agree or strongly agree)	2018/19	74%	77%▲	70%▼	63%▼	76%▲
	2017/18	73%	78%	72%	67%	73%
	2016/17	74%	72%	68%	63%	78%
LIKELIHOOD TO REJOIN (% likely or very likely)	2018/19	85%	84%	80%▼	80%▼	89%▲
	2017/18	81%	82%	77%	78%	86%
	2016/17	82%	77%	77%	75%	85%
JOINING PROCESS (% more than satisfied)	2018/19	57%	53%▼	59%	60%	62%▲
	2017/18*	57%	54%	59%	58%	59%

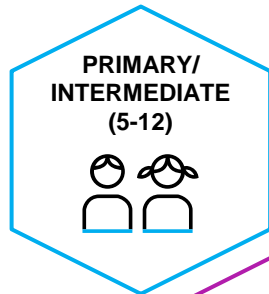
Base: Q6/Q7/Q11 All Respondents (Excluding Don't know/ Can't say), Q9 Members (Excluding Don't know/Can't say), Q20 New Members (Excluding Don't know/ Can't say)

* Previously average of four attributes

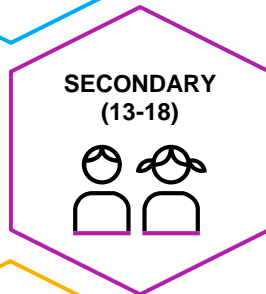
▲▼ Significantly higher/lower than Total 2018/19
 ▲▼ Significantly higher/lower than sub-group 2017/18

HOW DO KEY AGE BRACKETS DIFFER?

Compared with the Total 2018/19 result, respondents of the following age groups are significantly more likely to:



- ▶ Play or train once a week or less (28% cf. 25%) or two or three times a week (63% cf. 48%)
- ▶ Belong to their club *to have fun* (35% cf. 27%) or *to learn/ improve skills* (34% cf. 18%)
- ▶ Be more than satisfied with:
 - *The quality of coaches or instructors* (67% cf. 63%)
 - *Having qualified/ experienced officials available when I complete* (48% cf. 45%)
- ▶ If fees were to increase, for the focus of improvement to be on the *quality of coaches or instructors* (14% cf. 9%) or *player development programmes* (33% cf. 24%).



- ▶ Play or train two or three times a week (51% cf. 48%) or four or more times a week (28% cf. 24%)
- ▶ Belong to their club *to play competitively* (49% cf. 28%) or *to learn/ improve skills* (24% cf. 18%)
- ▶ If fees were to increase, for the focus of improvement to be on *player development programmes* (27% cf. 19%).



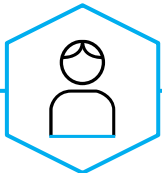
- ▶ Play or train two or three times a week (53% cf. 48%)
- ▶ To belong to their club *to play competitively* (39% cf. 28%)
- ▶ If fees were to increase, for the focus of improvement to be on the *quality of officiating* (13% cf. 8%).



- ▶ Play or train four or more times a week (38% cf. 24%)
- ▶ To belong to their club *to socialise* (11% cf. 6%), *to get fit and healthy* (17% cf. 10%) or *to have access to facilities and playing fields/venues/courts* (11% cf. 5%)
- ▶ To be more than satisfied with:
 - *Being friendly and welcoming* (77% cf. 73%)
 - *Having clean and well maintained facilities* (64% cf. 60%)
 - *Providing me the information I need, when I need it* (66% cf. 62%)
 - *Allowing me to fulfil my potential* (63% cf. 59%)
 - *Is fair and provides equal opportunities* (66% cf. 62%)
 - *The ease of accessing the club's venues/ fields/ courts for training or casual playing* (68% cf. 62%)
 - *The quality and variety of club competitions* (57% cf. 52%)
- ▶ If fees were to increase, for the focus of improvement to be on *facilities* (16% cf. 13%) or the *playing/ training venues/ fields/ courts* (22% cf. 15%).

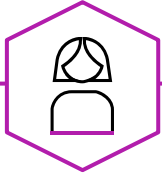
EXPERIENCE BY GENDER

KEY MEASURE		Total (n=5,633- 29,752)	Male (n=4,127- 21,222)	Female (n=1,503- 8,495)
SATISFACTION (% more than satisfied)	2018/19	64%	66%▲	60%▼
	2017/18	63%	63%	63%
	2016/17	61%	63%	59%
NPS (% promoters less % detractors)	2018/19	+41	+43▲	+36▼
	2017/18	+44	+44	+46
	2016/17	+40	+43	+36
VALUE FOR MONEY (% agree or strongly agree)	2018/19	74%	77%▲	68%▼
	2017/18	73%	74%	72%
	2016/17	74%	76%	71%
LIKELIHOOD TO REJOIN (% likely or very likely)	2018/19	85%	85%▲	83%▼
	2017/18	81%	81%	82%
	2016/17	82%	83%	81%
JOINING PROCESS (% more than satisfied)	2018/19	57%	58%	55%
	2017/18*	57%	56%	58%



Male respondents are **significantly more likely than females** to:

- ▶ Belong to their club *to have fun* (28% cf. 25% females)
- ▶ Be more than satisfied with their club *being friendly and welcoming* (75% cf. 70%), *having clean and well maintained facilities* (62% cf. 59%), *providing the information needed* (64% cf. 60%), *allowing me to fulfil my potential* (61% cf. 57%), *is fair and provides equal opportunities* (65% cf. 58%), *being professional and well managed* (64% cf. 61%) and *the social environment at the club* (66% cf. 61%)
- ▶ If fees increased, for the focus to be on *playing/ training venues/ fields/ clubs* (16% cf. 12%).



Female respondents are **significantly more likely than males** to:

- ▶ Belong to their club *to play competitively* (32% cf. 26% males)
- ▶ If fees increased for the focus of improvement to be on the *quality of officiating* (10% cf. 7%).

▲▼ Significantly higher/lower than Total 2018/19
 ■■ Significantly higher/lower than sub-group 2017/18

Base: Q6/Q7/Q11 All Respondents (Excluding Don't know/ Can't say), Q9 Members (Excluding Don't know/Can't say), Q20 New Members (Excluding Don't know/ Can't say)
 Q6 / Q7 / Q11 / Q9 / Q20
 * Previously the average of four attributes

EXPERIENCE BY ETHNICITY

KEY MEASURE		Total (n=5633- 29752)	NET European (n=4270- 23927)	Māori (n=1141- 4985)	NET Pasifika (n=632- 2155)	NET Asian & Indian (n=362- 1699)
SATISFACTION (% more than satisfied)	2018/19	64%	65%▲	62%	60%▼	58%▼
	2017/18	63%	66%	65%	60%	50%
	2016/17	61%	63%	64%	58%	55%
NPS (% promoters less % detractors)	2018/19	+41	+41▲	+39	+43	+35▼
	2017/18	+44	+47	+49	+42	+30
	2016/17	+40	+45	+45	+45	+32
VALUE FOR MONEY (% agree or strongly agree)	2018/19	74%	75%▲	70%▼	70%▼	73%
	2017/18	73%	75%	72%	68%	71%
	2016/17	74%	79%	76%	70%	70%
LIKELIHOOD TO REJOIN (% likely or very likely)	2018/19	85%	86%▲	82%▼	82%▼	85%
	2017/18	81%	83%	81%	76%	79%
	2016/17	82%	85%	83%	78%	82%
JOINING PROCESS (% more than satisfied)	2018/19	57%	56%	57%	57%	62%
	2017/18*	57%	57%	59%	54%	49%

Base: Q6/Q7/Q11 All Respondents (Excluding Don't know/ Can't say), Q9 Members (Excluding Don't know/Can't say), Q20 New Members (Excluding Don't know/ Can't say)
Q6 / Q7 / Q11 / Q9 / Q20
* Previously the average of four attributes

▲▼ Significantly higher/lower than Total 2018/19
■ Significantly higher/lower than sub-group 2017/18

HOW DO THE LARGEST CULTURAL GROUPS DIFFER?

Compared with the Total 2018/19 result, respondents of the following ethnicities are significantly more likely to:



EUROPEAN
/ PĀKEHĀ

- ▶ To belong to their club *to have fun* (29% cf. 27%).



MĀORI

- ▶ Belong to their club *to learn/ improve skills* (24% cf. 18%)
- ▶ Play or train two or three times a week (57% cf. 48%)
- ▶ Be *dissatisfied/ very dissatisfied* with *communicating with you about the coaching, officiating and event opportunities and development provided by <NSO>* (18% cf. 14%), *the quality and variety of club competitions* (19% cf. 11%) and *the amount and timeliness of information about competitions and draws* (17% cf. 13%)
- ▶ If fees increased, for the focus on improvement to be on *player development programmes* (28% cf. 24%) or the *quality of coaches or instructors* (11% cf. 9%).



PASIFIKA

- ▶ To belong to their club *to learn/ improve skills* (32% cf. 18%) or *to get fit and healthy* (15% cf. 10%)
- ▶ To play or train two or three times a week (60% cf. 48%)
- ▶ Be *dissatisfied/ very dissatisfied* with *having well maintained playing/ training venues/ fields/ courts* (10% cf. 7%)
- ▶ If fees increased, for the focus of improvement to be on *player development programmes* (29% cf. 24%), *facilities* (18% cf. 13%) or the *management of the club* (7% cf. 5%).



ASIAN & INDIAN

- ▶ To belong to their club *to play competitively* (33% cf. 28%), *to get fit and healthy* (16% cf. 10%) or *to learn/ improve skills* (21% cf. 18%)
- ▶ If fees increased, for the focus of improvement to be on *playing/ training venues/ fields/ courts* (18% cf. 15%) or *player development programmes* (27% cf. 24%).

Base: All Respondents

Q34. Which ethnic group or groups do/ does you/ your child identify with or belong to?

Note: Respondents can identify with more than one ethnicity, therefore results may add up to more than 100%.

REGIONAL DIFFERENCES

HOW DO REGIONS DIFFER ON SATISFACTION?

REGION	SATISFACTION (% more than satisfied) 2018/19 (n=29,752)	SATISFACTION (% more than satisfied) 2017/18 (n=28,576)	SATISFACTION (% more than satisfied) 2016/17 (n=24,784)
TOTAL	64%	63%	61%
Northland	60% ▼	72%	65%
Auckland	64%	58%	57%
Waikato	63%	67%	61%
Bay of Plenty	67% ▲	65%	56%
Gisborne	66%	67%	61%
Hawke's Bay	64%	70%	72%
Taranaki	65%	66%	68%
Manawatu	58% ▼	67%	60%
Whanganui	63%	57%	-
Wellington-Wairarapa	65%	66%	68%
Tasman	61%	68%	64%
Nelson	58% ▼	53%	57%
Marlborough	68%	59%	48%
West Coast	68%	69%	67%
Canterbury	65% ▲	65%	62%
Otago	61%	67%	63%
Southland	64%	65%	54%

Base: Q6 (Excluding Don't know/Can't say)

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

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

▲ ▼ Significantly higher/lower than Total 2018/19

■ Significantly higher/lower than sub-group 2017/18

HOW DO REGIONS DIFFER ON NPS?

REGION	NPS (% promoters less % detractors) 2018/19 (n=29,706)	NPS (% promoters less % detractors) 2017/18 (n=28,477)	NPS (% promoters less % detractors) 2016/17 (n=24,801)
TOTAL	+41	+44	+40
Northland	+46▲	+57	+58
Auckland	+38▼	+36	+29
Waikato	+41	+48	+40
Bay of Plenty	+52▲	+50	+35
Gisborne	+53▲	+57	+39
Hawke's Bay	+42	+54	+56
Taranaki	+44	+46	+48
Manawatu	+33▼	+55	+50
Whanganui	+33	+49	
Wellington-Wairarapa	+44▲	+48	+47
Tasman	+36	+67	+48
Nelson	+31▼	+36	+39
Marlborough	+47	+47	+35
West Coast	+45	+61	+60
Canterbury	+39▼	+44	+44
Otago	+42	+49	+50
Southland	+38	+49	+32

Base: Q7 All Respondents (Excluding Don't know/Can't say)

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

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?

▲▼ Significantly higher/lower than Total 2018/19

■ Significantly higher/lower than sub-group 2017/18

HOW DO REGIONS DIFFER ON VALUE FOR MONEY?

REGION	VALUE FOR MONEY (% agree or strongly agree) 2018/19 (n=29,119)	VALUE FOR MONEY (% agree or strongly agree) 2017/18 (n=27,916)	VALUE FOR MONEY (% agree or strongly agree) 2016/17 (n=24,466)
TOTAL	74%	73%	74%
Northland	74%	81%	81%
Auckland	74%	68%	69%
Waikato	75%	79%	78%
Bay of Plenty	79%▲	77%	76%
Gisborne	74%	72%	77%
Hawke's Bay	71%	81%	79%
Taranaki	82%▲	79%	77%
Manawatu	65%▼	78%	73%
Whanganui	59%▼	70%	
Wellington-Wairarapa	76%▲	76%	78%
Tasman	69%	86%	81%
Nelson	66%	70%	78%
Marlborough	79%	75%	68%
West Coast	79%	82%	83%
Canterbury	73%	72%	74%
Otago	71%	77%	76%
Southland	75%	79%	73%

Base: Q11 All Respondents (Excluding Don't know/Can't say)

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

Q11. To what extent do you agree or disagree with the following... 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

▲▼ Significantly higher/lower than Total 2018/19
 ■ Significantly higher/lower than sub-group 2017/18

HOW DO REGIONS DIFFER ON LIKELIHOOD TO REJOIN?

REGION	LIKELIHOOD TO REJOIN (% quite likely or very likely) 2018/19 (n=27,759)	LIKELIHOOD TO REJOIN (% quite likely or very likely) 2017/18 (n=27,425)	LIKELIHOOD TO REJOIN (% quite likely or very likely) 2016/17 (n=24,171)
TOTAL	85%	81%	82%
Northland	88%	86%	80%
Auckland	84%	79%	79%
Waikato	84%	80%	84%
Bay of Plenty	89%▲	82%	83%
Gisborne	86%	77%	85%
Hawke's Bay	84%	85%	85%
Taranaki	86%	84%	87%
Manawatu	85%	83%	84%
Whanganui	85%	85%	-
Wellington-Wairarapa	85%	82%	84%
Tasman	88%	88%	85%
Nelson	79%▼	85%	86%
Marlborough	85%	87%	81%
West Coast	88%	82%	75%
Canterbury	83%▼	83%	82%
Otago	87%	83%	85%
Southland	86%	82%	86%

Base: Q9 Members (Excluding Don't know/Can't say)

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

Q9. How likely are/is you/your child to play for or rejoin <insert club from Q2a> next season?

▲▼ Significantly higher/lower than Total 2018/19

■ Significantly higher/lower than sub-group 2017/18

HOW DO REGIONS DIFFER ON JOINING PROCESS?

REGION	JOINING PROCESS (% more than satisfied – the overall joining process) 2018/19 (n=5,633)	JOINING PROCESS (% more than satisfied – average of 4 attributes) 2017/18 (n=122-8,765)	JOINING PROCESS (% more than satisfied – average of 4 attributes) 2016/17 (n=500-4,073)
TOTAL	57%	58%	52%
Northland	60%	58%	53%
Auckland	56%	51%	49%
Waikato	59%	66%	59%
Bay of Plenty	59%	58%	44%
Gisborne	72%	56%	69%
Hawke's Bay	47%	66%	56%
Taranaki	56%	58%	52%
Manawatu	59%	71%	52%
Whanganui	74%	65%	
Wellington-Wairarapa	63%▲	62%	59%
Tasman	58%	63%	25%
Nelson	47%	43%	43%
Marlborough	80%▲	64%	45%
West Coast	70%	61%	45%
Canterbury	56%	58%	52%
Otago	49%▼	57%	57%
Southland	53%	69%	46%

Base: Q20 New Members (Excluding Don't know/Can't say)

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

Q20 (The overall joining process for 2018/19. For 2016/17 and 2017/18 it is the average of four attributes) Thinking about the process you/you and your child went through when you/your child joined your/their club. How satisfied are you with your/their club on the following

▲▼ Significantly higher/lower than Total 2018/19

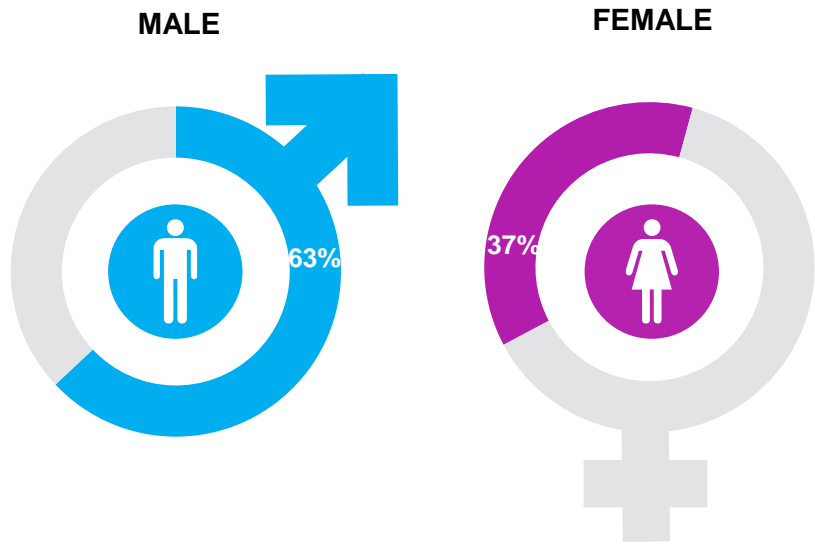
SAMPLE PROFILE

NSO

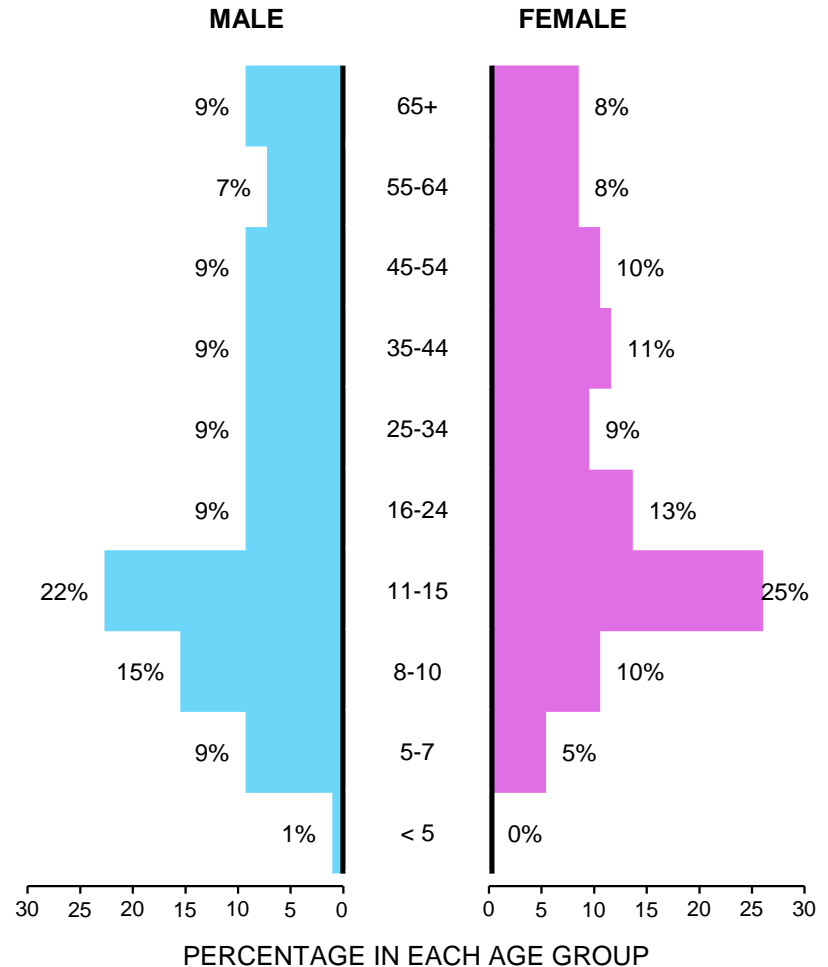
NSO	TOTAL 2018/19 (n=30,081)	PLAYER (n=17,990)	PARENT (n=12,091)
Badminton New Zealand	1,048	15%	3%
Netball New Zealand	2,895	8%	13%
Hockey New Zealand	2,276	12%	8%
New Zealand Cricket	4,230	7%	14%
New Zealand Football (Futsal)	580	7%	14%
New Zealand Rugby	8,773	6%	17%
New Zealand Rugby League	1,113	6%	16%
New Zealand Golf	6,614	16%	0
Tennis New Zealand	1,251	16%	1%
Touch New Zealand	1,301	7%	15%

AGE-GENDER DISTRIBUTION

Half of all male respondents were under the age of 16 (50%). There was a significantly lower proportion of female respondents under the age of 16 (34%).



GENDER (Q25)	TOTAL (n=30081)	PLAYER (n=17990)	PARENT (n=12091)
MALE	63%	60%	68%
FEMALE	37%	40%	32%
GENDER DIVERSE	<1%	<1%	<1%



AGE

AGE (Q22)	TOTAL (n=30081)	Rugby league NZ (n=1113)	Netball NZ (n=2895)	Badminton NZ (n=1048)	Hockey NZ (n=2276)	Futsal NZ (n=580)	Rugby NZ (n=8773)	Cricket NZ (n=4230)	Touch NZ (n=1301)	Golf NZ (n=6614)	Tennis NZ (n=1251)
Less than 5 years	1%	2%	<1%	<1%	<1%	-	3%	<1%	<1%	<1%	<1%
Primary/ intermediate (5-12 years)	32%	49%	37%	6%	21%	34%	64%	51%	57%	1%	2%
Secondary (13-18 years)	17%	21%	26%	18%	26%	38%	9%	18%	11%	1%	2%
Young adults (19-34 years)	14%	12%	15%	16%	24%	18%	16%	15%	12%	6%	7%
Adults (35+ years)	36%	15%	21%	59%	28%	9%	9%	15%	20%	92%	89%

REGION

REGION (Q23)	TOTAL (n=30081)	Rugby league NZ (n=1113)	Netball NZ (n=2895)	Badminton NZ (n=1048)	Hockey NZ (n=2276)	Futsal NZ (n=580)	Rugby NZ (n=8773)	Cricket NZ (n=4230)	Touch NZ (n=1301)	Golf NZ (n=6614)	Tennis NZ (n=1251)
Northland	3%	4%	7%	2%	2%	<1%	4%	2%	2%	5%	6%
Auckland	29%	56%	30%	31%	28%	13%	21%	28%	23%	27%	35%
Waikato	9%	6%	7%	15%	4%	10%	10%	9%	10%	10%	4%
Bay of Plenty	7%	6%	2%	10%	4%	8%	5%	4%	8%	8%	13%
Gisborne	1%	-	<1%	2%	2%	<1%	1%	1%	-	1%	2%
Hawke's Bay	4%	-	2%	3%	3%	13%	4%	4%	1%	4%	5%
Taranaki	2%	1%	<1%	1%	2%	<1%	3%	4%	3%	3%	1%
Manawatu	4%	2%	2%	6%	4%	9%	4%	3%	3%	3%	2%
Whanganui	1%	<1%	1%	1%	1%	3%	1%	1%	<1%	1%	2%
Wellington- Wairarapa	10%	7%	8%	14%	11%	14%	13%	16%	1%	12%	7%
Tasman	1%	-	3%	<1%	1%	<1%	2%	1%	1%	1%	1%
Nelson	2%	<1%	5%	<1%	1%	-	1%	1%	3%	1%	3%
Marlborough	1%	<1%	1%	<1%	1%	-	1%	1%	1%	1%	3%
West Coast	<1%	1%	1%	<1%	1%	-	1%	<1%	<1%	<1%	-
Canterbury	17%	13%	16%	9%	26%	13%	17%	19%	32%	14%	13%
Otago	7%	1%	9%	4%	9%	16%	6%	6%	6%	6%	4%
Southland	2%	1%	4%	2%	2%	-	4%	1%	7%	2%	1%

ETHNICITY

ETHNICITY (Q34)	TOTAL (n=30081)	Rugby league NZ (n=1113)	Netball NZ (n=2895)	Badminton NZ (n=1048)	Hockey NZ (n=2276)	Futsal NZ (n=580)	Rugby NZ (n=8773)	Cricket NZ (n=4230)	Touch NZ (n=1301)	Golf NZ (n=6614)	Tennis NZ (n=1251)
NET European/ Pakeha	77%	42%	82%	61%	88%	88%	76%	79%	78%	91%	86%
Māori	17%	51%	23%	5%	10%	10%	26%	8%	29%	5%	5%
NET Pasifika	8%	45%	7%	1%	2%	2%	13%	2%	7%	1%	1%
Samoaan	4%	24%	4%	1%	1%	1%	7%	1%	3%	<1%	<1%
Tongan	2%	12%	1%	<1%	<1%	1%	3%	<1%	1%	<1%	<1%
Cook Island	2%	12%	2%	<1%	<1%	<1%	2%	<1%	2%	<1%	1%
Fijian	1%	2%	<1%	<1%	<1%	<1%	1%	<1%	1%	<1%	<1%
Niuean	1%	6%	1%	<1%	<1%	<1%	1%	<1%	1%	<1%	<1%
NET Asian + Indian	8%	2%	3%	33%	6%	6%	2%	15%	3%	3%	7%
Chinese	3%	1%	1%	19%	1%	3%	1%	1%	2%	1%	3%

ROLE AT CLUB & MEMBERSHIP TENURE

MEMBERSHIP TENURE (Q3)	TOTAL (n=28205)	Rugby league NZ (n=1053)	Netball NZ (n=2612)	Badminton NZ (n=905)	Hockey NZ (n=2138)	Futsal NZ (n=332)	Rugby NZ (n=8549)	Cricket NZ (n=3835)	Touch NZ (n=1066)	Golf NZ (n=6498)	Tennis NZ (n=1217)
Less than 1 year	19%	28%	14%	13%	22%	12%	28%	22%	25%	13%	10%
1-2 years	19%	20%	14%	13%	19%	37%	20%	23%	27%	12%	13%
3-5 years	29%	28%	34%	27%	31%	37%	32%	35%	30%	18%	22%
6-10 years	14%	15%	19%	14%	12%	12%	12%	10%	10%	14%	20%
More than 10 years	19%	9%	18%	33%	17%	2%	7%	9%	9%	43%	34%

COMPETITIVE LEVEL

COMPETITIVE LEVEL (Q28)	TOTAL (n=28205)	Rugby league NZ (n=1053)	Netball NZ (n=2612)	Badminton NZ (n=905)	Hockey NZ (n=2138)	Futsal NZ (n=332)	Rugby NZ (n=8549)	Cricket NZ (n=3835)	Touch NZ (n=1066)	Golf NZ (n=6498)	Tennis NZ (n=1217)
Played for the top team at my club	26%	34%	24%	30%	34%	38%	28%	33%	22%	9%	17%
Been selected to represent my club at a regional event/competition	18%	20%	14%	46%	12%	21%	16%	18%	10%	16%	9%
Been selected to represent my region at a national event/competition	14%	19%	5%	35%	23%	34%	7%	9%	13%	2%	6%
Been selected to represent New Zealand at an international event/competition	2%	3%	1%	4%	3%	5%	1%	1%	2%	<1%	1%
None of these	61%	54%	70%	34%	53%	47%	64%	58%	69%	79%	75%

PLAYING FREQUENCY

FREQUENCY OF PLAYING/ TRAINING (Q5)	TOTAL (n=30081)	Rugby league NZ (n=1113)	Netball NZ (n=2895)	Badminton NZ (n=1048)	Hockey NZ (n=2276)	Futsal NZ (n=580)	Rugby NZ (n=8773)	Cricket NZ (n=4230)	Touch NZ (n=1301)	Golf NZ (n=6614)	Tennis NZ (n=1251)
Once a week/month	22%	14%	20%	25%	18%	52%	13%	17%	50%	7%	1%
Two or three times a week/month	48%	64%	64%	52%	58%	36%	74%	62%	40%	17%	12%
Four or five times a week/month	12%	12%	11%	11%	14%	6%	8%	14%	7%	22%	19%
6 or more times a week/month	12%	1%	2%	4%	5%	1%	1%	3%	2%	41%	56%
Other	3%	4%	2%	1%	1%	1%	1%	1%	1%	4%	11%

BACKGROUND, OBJECTIVES AND APPROACH

ABOUT THE VOP 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 may 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.

METHODOLOGY

SAMPLE



Each participating NSO, with an accessible membership database, supplied Nielsen their database to distribute the survey link to.

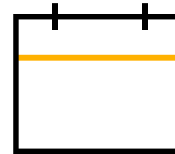
APPROACH



An email invitation, containing a personalised online link* to the Sport NZ VOP Club Experience Survey, was sent by Nielsen to eligible members/respondents, inviting them to take part.

All NSOs, including those without a database of members, were supplied an open survey link. NSOs distributed this open link via their own communication channels e.g. Facebook, newsletters etc.

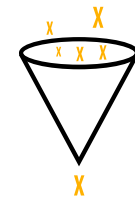
FIELDWORK



The survey was open between 20 July – 13 August 2018 (Winter 2018) and 15 March – 15 April 2019 (Summer 2019).

Reminders were sent during fieldwork on 30 July 2018, and 03 April 2019, followed by a second reminder on 06 August 2018 and 11 April 2019.

RESULT



A total of 30,081 respondents nationwide completed the survey, consisting of 17,990 players and 12,091 parents of children under the age of 16.

This gives a maximum margin of error for the total for all sports in 2018/19 of $\pm 0.6\%$ at a 95% confidence interval.

* A personalised link was used if one or two people were attributed to the one email address. An open survey link was used if three or more people were attributed to the same email address and the invite encouraged them to share the survey with others.

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 about a sub-group included), it may safely be assumed that differences 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 (note: the smaller the sample size, the higher the expected variance between samples and less likely that there will be statistically significant differences).

Statistical significance is reported in the following ways:

▲ / ▼ The sub-group is significantly higher/lower than the average for All Sports 2018/19

■ / ■ The result is significantly higher/ lower than the sub-group results in 2017/18

ROUNDING OF FIGURES

Due to rounding, the net figures provided (e.g. % 'very satisfied' and % 'extremely satisfied') and total results may differ from the numbers shown on the charts.

WEIGHTING

When 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. Please refer to the following page for a summary of the weighting.

STATISTICAL WEIGHTING

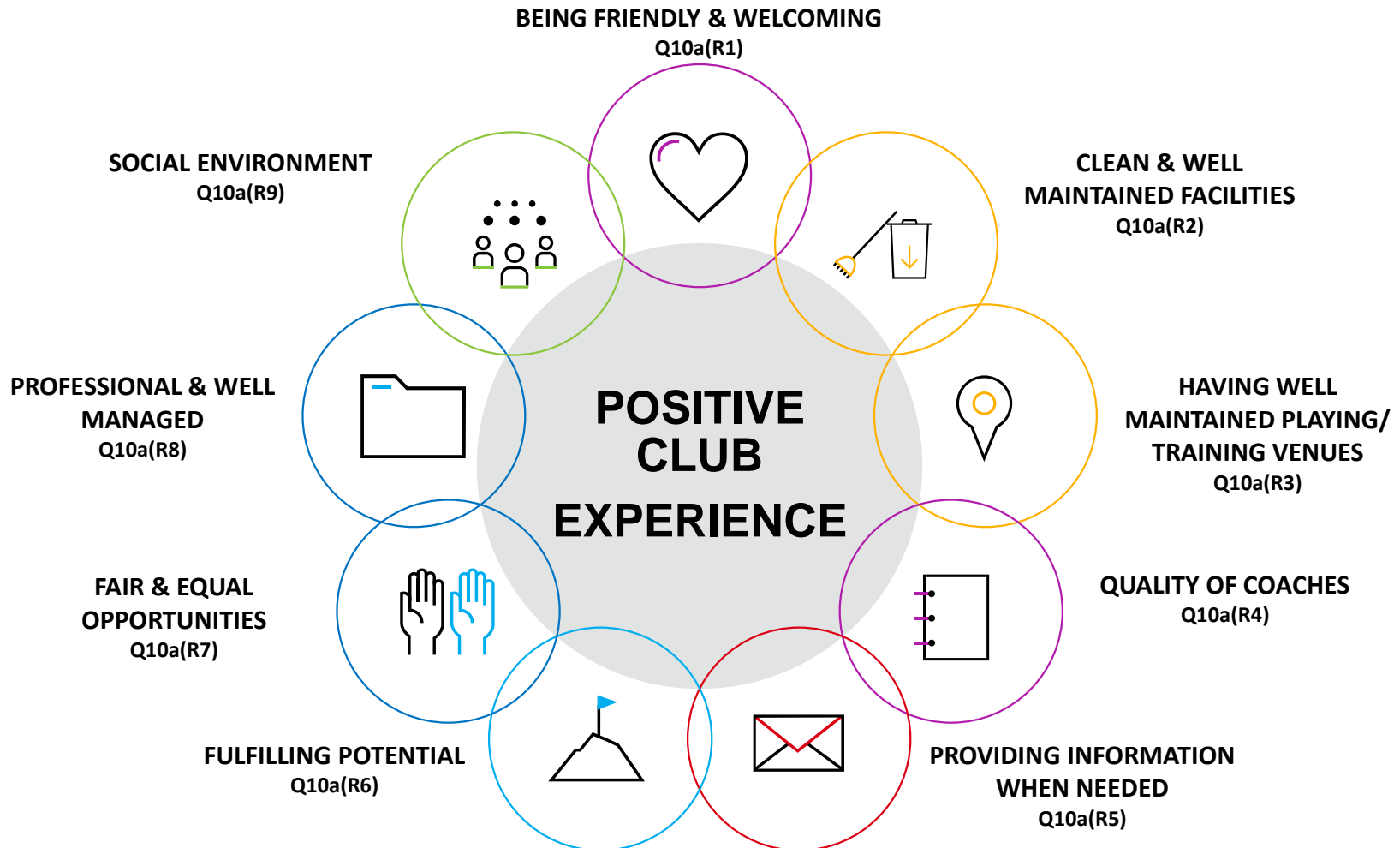
Results were weighted at a total level with each NSO contributing equally to the overall result. When the results in the report are broken down by subgroup (e.g. region or tenure) the NSOs will not be contributing equally due to variations in subgroup composition within each NSO. The weight factors applied to each NSO in 2017/18, 2016/17 and 2015 are as per the table below:

NSO	2018/19	2017/18	2016/17	2015 (Pilot)
Athletics New Zealand	-	-	1.313064	-
Badminton New Zealand	2.870324	3.337698	-	-
Basketball New Zealand	-	2.406184	-	-
Bowls New Zealand	-	-	1.403669	0.832665
New Zealand Cricket	0.711135	1.005167	0.810595	-
New Zealand Football	-	0.330894	0.311245	1.923611
Gliding New Zealand	-	-	7.022192	-
New Zealand Golf	0.454808	-	0.428827	-
New Zealand Hockey	1.321661	0.814207	-	-
Netball New Zealand	1.039067	-	1.592977	-
New Zealand Rugby	0.342882	0.434435	-	-
New Zealand Rugby League	2.702695	2.379083	9.457934	2.473214
Tennis New Zealand	2.404556	-	-	0.533376
Touch New Zealand	2.312145	-	1.337037	-
Softball New Zealand	-	4.912292	-	-
Surf Life Saving New Zealand	-	1.074955	-	0.533376
Waka Ama New Zealand	-	5.446041	8.085489	-
New Zealand Football (Futsal)	5.186379	-	-	-

EXPLANATION OF DRIVERS AND REGRESSION

DRIVERS OF THE CLUB EXPERIENCE

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



DRIVERS OF THE CLUB EXPERIENCE: CONTINUED

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 drivers. These are shown below with the associated question number.

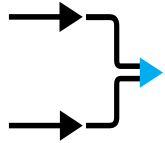
- ▶ Value for money (Q11)
- ▶ Encourages good sportsmanship and fair play (Q10b-R1)
- ▶ The ease of accessing the clubs venues/fields/courts for training or casual playing (Q10b-R2)
- ▶ Fostering a sense of pride in the club (Q10b-R3)
- ▶ Engaging with the local community (Q10b-R4)
- ▶ Being responsive to needs and requirements (Q10b-R5)
- ▶ Having qualified/experienced officials available when I compete (Q10b-R6)
- ▶ Providing a safe environment for adults and children (Q10b-R7).

In addition, individual NSOs had the opportunity to add other drivers considered important or topical for their sport, if required. For 2017/18 these were:

- ▶ Communicating with you about the coaching, officiating and event opportunities and development provided by <NSO> (Q10b-R12)
- ▶ Quality and variety of club competitions (Q10b-R14)
- ▶ Encouraging good player welfare principles e.g. nutrition & hydration, warm-ups/ cool downs (Q10b-R18)
- ▶ Providing player development programmes (Q10b-R19)
- ▶ The amount and timeliness of information about competitions and draws (Q10b-R22).

Note: There were 22 drivers in total for 2017/18. Attributes R14-R16 have not been included in the overall analysis due to the uniqueness to individual NSOs.

EXPLANATION OF REGRESSION



Regression analysis is a statistical process for analysing the relationship between two or more variables. It helps to understand the importance, or impact, of a 'driver' (the independent variable) by measuring its contribution to explaining variance in another variable (the dependent variable). Each independent variable is assigned a score ranging from zero to one - the closer to one, the more important/impact it has on the dependent variable. We have used a regression approach called Modified Kruskal, which addresses any multi-collinearity issues.

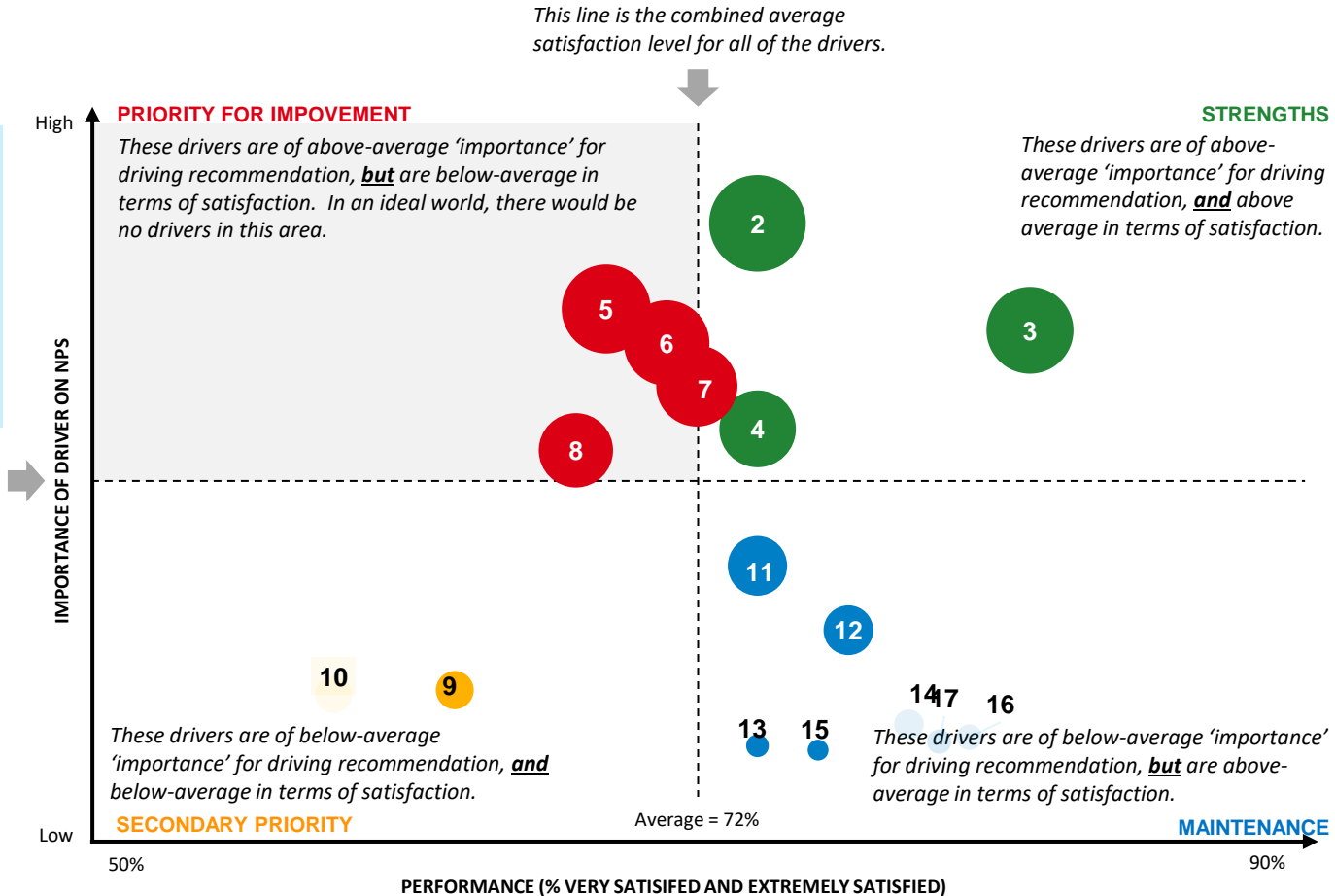
The dependent variable for the regression model is **recommendation** (the likelihood of a respondent to recommend their club to someone interested in playing their sport). The independent variables are the attributes/drivers in Q10a, Q10b and Q11 outlined in the previous slides.

The following chart shows the impact of each attribute/driver on a respondent's likelihood to recommend their club. The importance or impact of a driver on recommendation is shown on the vertical axis along with the size of the bubble (from the regression model). How respondents are rating their satisfaction with each of the drivers, is shown on the horizontal axis. This allows us to see what is more important but rated lower - that is where clubs should focus, in order to improve recommendation.

GUIDANCE ON HOW TO INTERPRET THIS CHART

The higher each attribute is on the vertical axis, the more 'important' it is in terms of driving people to recommend their club to others. E.g. For attributes at the top there is a strong relationship between satisfaction with this driver and whether or not people will recommend their club.

This line represents the average in terms of level of 'importance' for driving recommendation.



The further to the right each attribute is on the horizontal axis, the more satisfied people are with it.

