



SPORT NZ VOP PROGRAMME 2017/18 RESULTS



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INTRODUCTION

This report looks at the total results from the 2017/2018 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 2017 and summer 2017/2018. The table to the right shows which National Sporting Organisations (NSOs) took part during these waves. The report provides results at a 'combined' level, and does not show individual sports' results.

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 2017/18 with results from 2016/17. Though some NSOs have participated in the survey both years.

- NSOs that participated in both 2016/17 and 2017/18 include New Zealand Cricket, New Zealand Football, New Zealand Rugby League and Waka Ama New Zealand.
- NSOs that participated only in 2016/17 include Athletics New Zealand, Bowls New Zealand, Gliding New Zealand, Netball New Zealand, New Zealand Golf and Touch New Zealand.

Participants of each NSO were given the opportunity to participate via a direct email (if available) or via an open survey link communicated by Nielsen and/or the NSO. In 2017/18 60% of all respondents were players responding from their own perspective and 40% were a parent or guardian of a child who plays at or belongs to a club. This proportion of players in 2017/18 was significantly lower than that in 2016/17 where 70% of the sample was players and 30% was parents.

| | | |
|-----------------------|------------------|---|
| Winter 2017 | Football |  |
| | Hockey |  |
| | Basketball |  |
| | Rugby league |  |
| | Rugby union |  |
| | Badminton |  |
| Summer 2017/18 | Softball |  |
| | Waka ama |  |
| | Cricket |  |
| | Surf life saving |  |

COMPARISON OF DIFFERENT SPORTS

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 customers 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 two sports are structured slightly differently. One focuses on the 'association' they belong to instead of 'club', and the other has a mixture of club, association and 'event only' players.
- These sports also have a high number of casual players who were included in the survey (9% and 19%) which other sports don't have.
- Demographic differences, particularly the proportion of children vs. adults, as needs and expectations can differ between different groups.

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 2017/18

□ / □ The total 2017/18 result is significantly higher/lower than the total for All Sports 2016/17

ROUNDING OF FIGURES

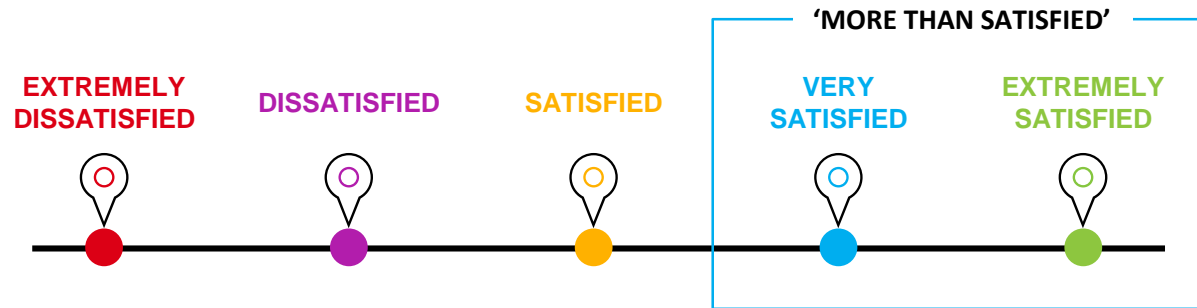
Due to rounding, the net figures provided (e.g. % 'very satisfied' and % 'extremely satisfied') and total results may differ from the numbers shown on the charts.

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.

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.

EXECUTIVE SUMMARY

KEY METRICS

Overall, respondents of participating NSOs in 2017/18 are more positive compared with 2016/17. Ratings are significantly higher in terms of satisfaction (63% cf. 61%), NPS (+44 cf. +40) and the joining process (58% cf. 53%). Perceived value for money and retention are on par with 2017/18. Four of the ten participating NSOs were also involved in 2016/17.

DRIVERS OF THE CLUB EXPERIENCE IN 2017/18

The top three drivers of recommendation i.e. those that have the most impact on whether a respondent recommends their club to someone who is interested in playing/ participating in their sport are:

1. *Value for money*
2. *Fair and provides equal opportunities*
3. *Being professional and well managed.*

Fair and equal opportunities has replaced *allowing me to fulfil my potential* (which was ranked second in 2016/17) However, *allowing me to fulfil my potential* and *responsiveness to members' needs and requirements* remain the areas to focus on due to their relatively low performance and above average importance.

The driver respondents are least satisfied with is *having qualified/experienced officials available when they compete* but this is a secondary priority for improvement.

WHERE DO RESPONDENTS THINK CLUBS SHOULD INVEST (IF FEES INCREASED)

Areas for improvement don't necessarily require direct investment. When asked where clubs should invest, assuming any investment would require an increase in fees, a quarter (24%) of respondents want their club to invest in *player development programmes* (cf. 18% in 2016/17). Parents of children feel even more strongly this is where investment is needed (31% cf. 19% for players).

Facilities based improvement (both club rooms/changing rooms and playing/training venues/fields/ courts), although not solely the influence of the club and requiring collaboration across NSOs, RSTs and councils, are the next two areas where respondents would like investment to occur.

EXECUTIVE SUMMARY

REASON FOR BELONGING TO A CLUB

Overall, three in ten mainly belong to a club to *play competitively*. This is particularly evident among players (33% cf. 25% of parents saying their children belong to play competitively). Parents are more likely to say their children belong *to learn/improve skills* (34% cf. 13% players).

Fun also plays a large role as indicated by a quarter of all respondents – a significantly higher proportion than in 2016/17 (24% cf. 16%). This may be attributable to the higher proportion of respondents who are completing the survey on behalf of their child in 2017/18 compared with in 2016/17 (40% cf. 30%).

REASONS FOR CHANGING CLUBS

Almost half of respondents have been a member of another club, but the dominant reason why they changed is because they moved (34%).

COMPLAINTS

Only 8% of the total sample in 2017/18 made a complaint to their club in the past three months. Two sports' respondents were significantly more likely to have made a complaint, despite similar levels of dissatisfaction to the total for all sports in 2017/18.

INJURIES

Compared with 2016/17, there is a higher rate of injury among participating NSOs (27% cf. 21%). While there is a higher proportion of injured respondents, there is also greater satisfaction with the clubs' management of injuries with a significantly higher proportion who were *more than satisfied* with each of the aspects of injury management (ratings ranging from 62% to 68% more than satisfied cf. 51% to 62% in 2016/17).

EXECUTIVE SUMMARY

REGIONAL DIFFERENCES

Overall, results are generally positive across all regions with Northland, Waikato, Hawkes Bay and Manawatu all having significantly higher results across four of the five key metrics. Conversely, Auckland and Nelson have significantly lower results than the rest.

DEMOGRAPHICS DIFFERENCES

Overall, primary/intermediate aged children (5-12 years) are the most satisfied and results are improving with higher or significantly higher results than the result for all sports in 2016/17. However, in 2017/18, there are significantly fewer respondents aged 5-12 who are *more than satisfied* with the joining process than other age brackets.

Results for adults (19+) are less positive overall compared to 2016/17 except for the joining process which is on par with last year. Even though adults are the most likely to rejoin, they are the least satisfied with the overall experience and perceived value for money (60% and 71%, respectively).

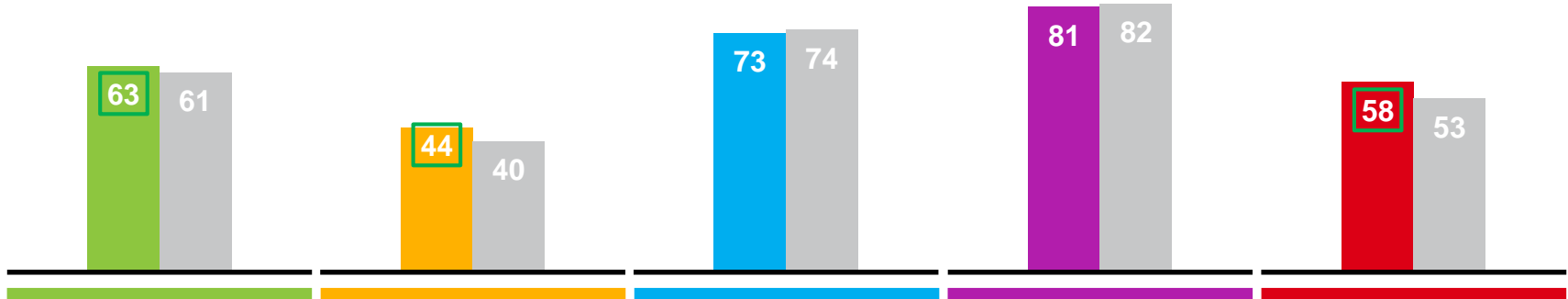
There is very little difference between the results for males and females.

Those of Asian or Indian ethnicity appear to be the least satisfied with their club experience. This is illustrated by a significantly lower proportion who are less satisfied with the overall experience (50% cf. 63% for all respondents), less satisfied with the joining process (50% cf. 58%), less likely to recommend their club (+30 cf. +44) and less likely to rejoin (79% cf. 81%).

Pasifika are also less satisfied with the overall experience (60% cf. 63% for all respondents), the joining process (54% cf. 58%), value for money (68% cf. 73%) and are less likely to rejoin (76% cf. 81%).

KEY METRIC RESULTS

Overall, results are more positive than in 2016/17.



SATISFACTION

(Q6: % more than satisfied)

Almost two-thirds (63%) of respondents are *more than satisfied* with the overall experience of playing at their club. A significantly higher result than in 2016/17 (61%).

NPS

(Q7: % promoters less % detractors)

Respondents of participating NSOs are significantly more likely to recommend their current club to someone interested in playing, illustrated by a Net Promoter Score (NPS) of +44 compared with +40 for all sports in 2016/17.

VALUE FOR MONEY

(Q11: % agree or strongly agree)

Three-quarters (73%) perceive value for money from their club. That is; the *opportunities, services and benefits they receive from their club make it well worth the money they pay*. This is on par with the average for all sports in 2016/17.

LIKELIHOOD TO REJOIN

(Q9: % quite likely or very likely)

Retention is on par with all sports in 2016/17, with four in five (81%) indicating they are likely to rejoin their current club next season.

JOINING PROCESS

(Q20: % more than satisfied – average of 4 attributes)

For new members (less than a year), three in five (58%) are *more than satisfied* with the process they went through when they joined their club. A significantly higher proportion than the average for all sports in 2016/17.

ALL SPORTS 2017/18

ALL SPORTS 2016/17

Base: Q6/Q7/Q9 All respondents (Excluding Don't know/not applicable), Q9 All members (Excluding Don't know/not applicable), Q20 New members (Excluding Don't know/not applicable)
 Q6 (n=28576)/Q7 (n=28477)/Q11 (n=27916)/Q9 (n=27425)/Q20 (n=26393) (Average of four attributes)

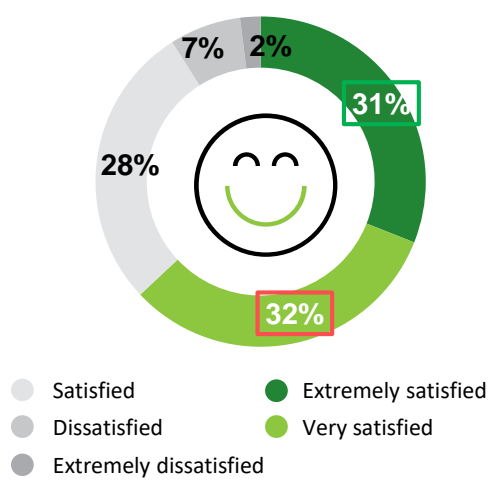
Green box / Red box Significantly higher/lower than All Sports 2016/17

KEY METRIC RESULTS

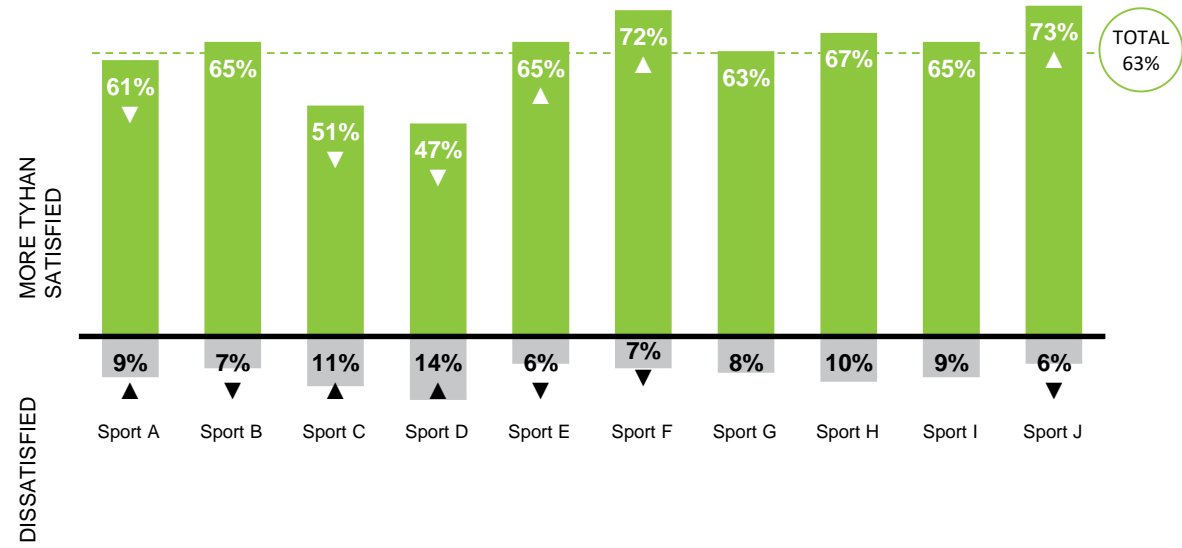
TWO-THIRDS ARE MORE THAN SATISFIED - A SIGNIFICANTLY HIGHER PROPORTION THAN IN 2016/17

A significantly higher proportion of respondents are 'very satisfied' with the overall experience at their club (31% cf. 25% in 2016/17). There is a large range in participant satisfaction, ranging from 47% to 73%.

SATISFACTION WITH CLUB EXPERIENCE



NSO



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

- ▶ Those who agree or strongly agree that it is value for money (78% cf. 63% average)
- ▶ Likely or very likely to rejoin (72%)
- ▶ New members (less than 1 year) (67%)
- ▶ Those who mainly belong to *have fun* (68%) or *learn/improve skills* (67%)
- ▶ Parents of players (65% cf. 62% for players).

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

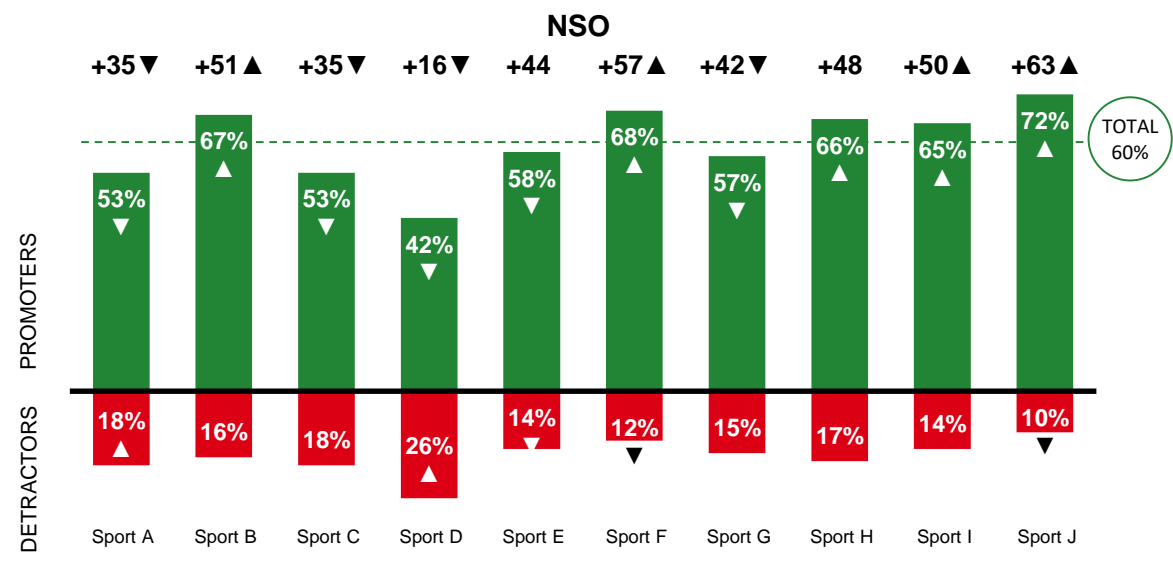
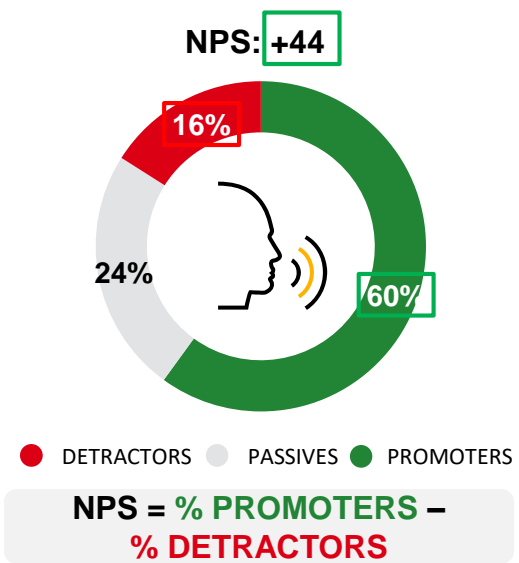
- ▶ Those who disagree or strongly disagree that it is value for money (13% cf. 63% average)
- ▶ Unlikely or very unlikely to rejoin (40%)
- ▶ Those who mainly belong to *have access to facilities and playing fields/venues/courts* (55%) or to *play competitively* (59%)
- ▶ Those who indicated *management of the club* (30%), *quality of coaching* (47%) or *communications* (50%) are areas for improvement (if fees increased)
- ▶ Those who play or train once a week or less (60%)
- ▶ Casual players (46% cf. 64% for members).

▲▼ Significantly higher/lower than Total 2017/18

□ / □ Significantly higher/lower than All Sports 2016/17

THREE IN FIVE RESPONDENTS ARE VERY LIKELY TO RECOMMEND THEIR CLUB

Compared with 2016/17, there is not only a higher proportion of promoters among participating NSOs (60% cf. 58%), but there are fewer detractors (16% cf. 18%). As a result, the NPS score is significantly higher than 2016/17 (+44 cf. +40).



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

- ▶ Longer tenured members more than 10 years (67% cf. 60% average)
- ▶ Those who mainly belong to *socialise* (64%), *learn/improve skills* (64%), or *have fun* (63%).

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

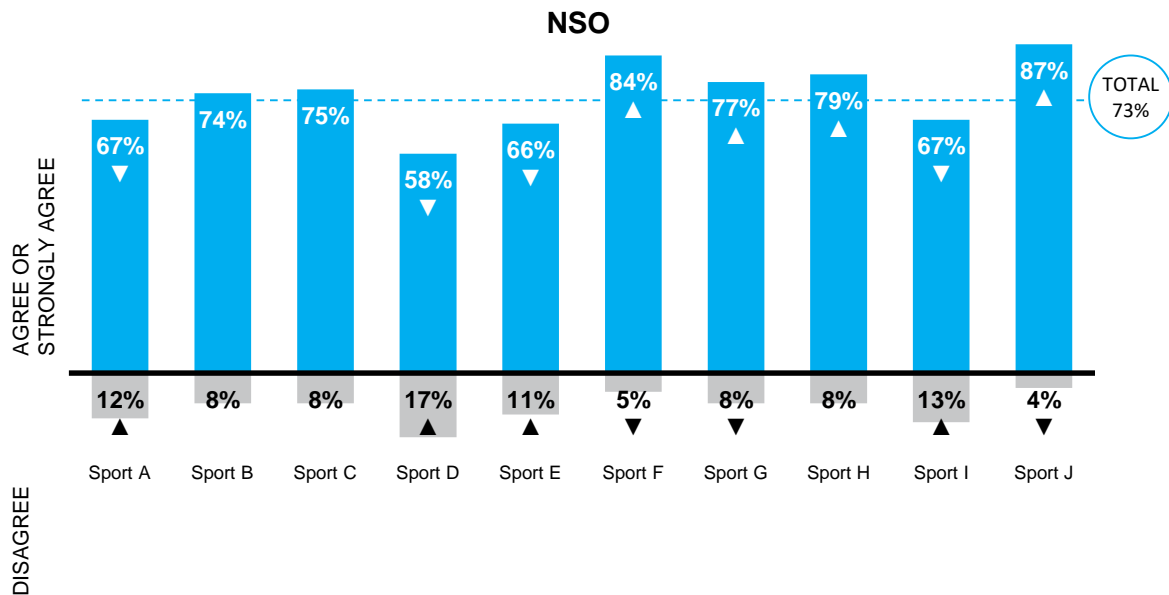
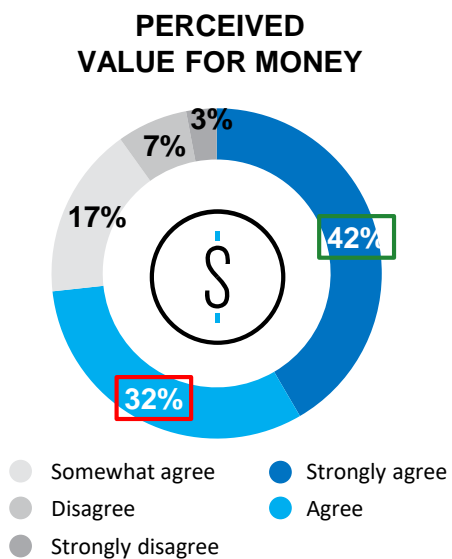
- ▶ Those who indicated *management of the club* (50% cf. 16% average), *quality of coaching* (28%) or *communications* (28%) are areas for improvement (if fees increased)
- ▶ Those who mainly belong to *play competitively* (19%)
- ▶ Those who play or training four or five times a week (18%)
- ▶ Casual players (21% cf. 16% for members).

Base: All respondents (Excluding Don't know/not applicable) (n=28477)
 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 2017/18
 □ / □ Significantly higher/lower than All Sports 2016/17

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

While consistent with 2016/17 (73% cf. 74%), a higher proportion 'strongly agree' that what they receive from their club is worth the money they pay



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

- ▶ Those who mainly belong to *learn/improve skills* (78% cf. 73% average) or to *have fun* (76%)
- ▶ Those who play or train less than once a week (78%)
- ▶ New members (less than 1 year) (76%)
- ▶ Parent of players (75% cf. 72% for players).

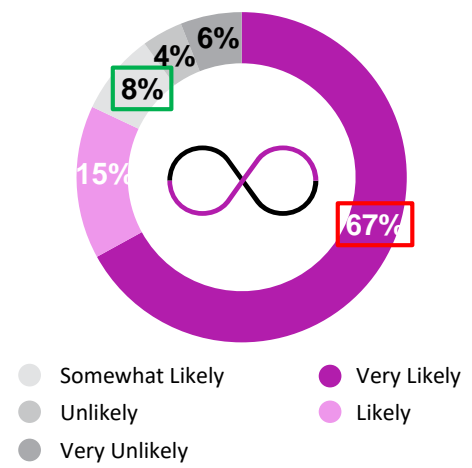
Those **significantly less** likely to perceive value for money are:

- ▶ Those who indicated *management of the club* (43% cf. 73% average), *quality of coaching* (62%) or *communications* (67%) are areas for improvement (if fees increased).
- ▶ Those who mainly belong to *play competitively* (68%)
- ▶ Members for 6-10 years (71%)
- ▶ Casual players (63% cf. 74% for members).

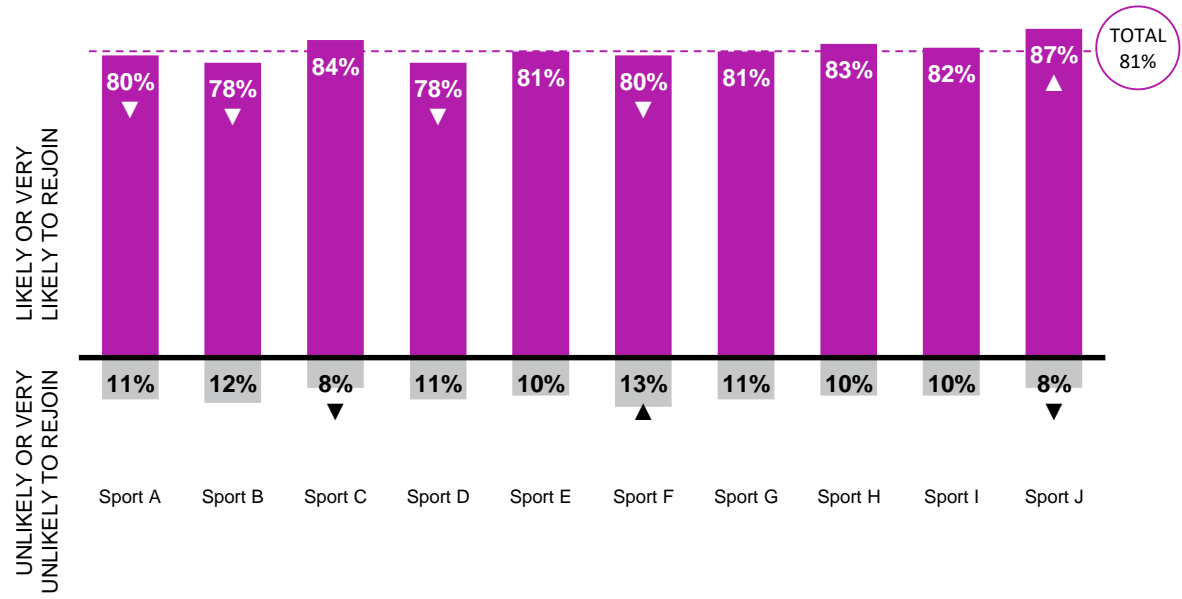
FOUR IN FIVE MEMBERS ARE LIKELY TO REJOIN THEIR CURRENT CLUB NEXT SEASON

Overall, retention is relatively consistent across all NSOs.

LIKELIHOOD TO REJOIN



NSO



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

- ▶ Long tenured members - more than 10 years (86% cf. 81% average)
- ▶ Non-playing member e.g. coaches (85%), managers (87%), committee members (90%) or presidents or other office holders (91%)
- ▶ Those who have played for the top team at the club or higher representative honours (83%).

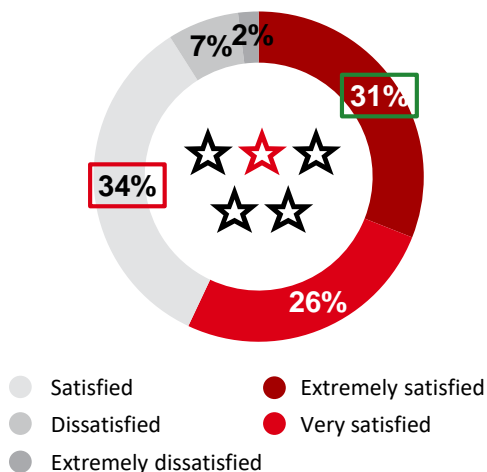
Those **significantly less** likely to rejoin are:

- ▶ Those who made a complaint in the last 3 months (59% cf. 81% average)
- ▶ Those who indicated *management of the club* (58%), *quality of coaching* (71%) or *communications* (76%) are areas for improvement (if fees increased)
- ▶ Those who play or train less than once a week (75%).

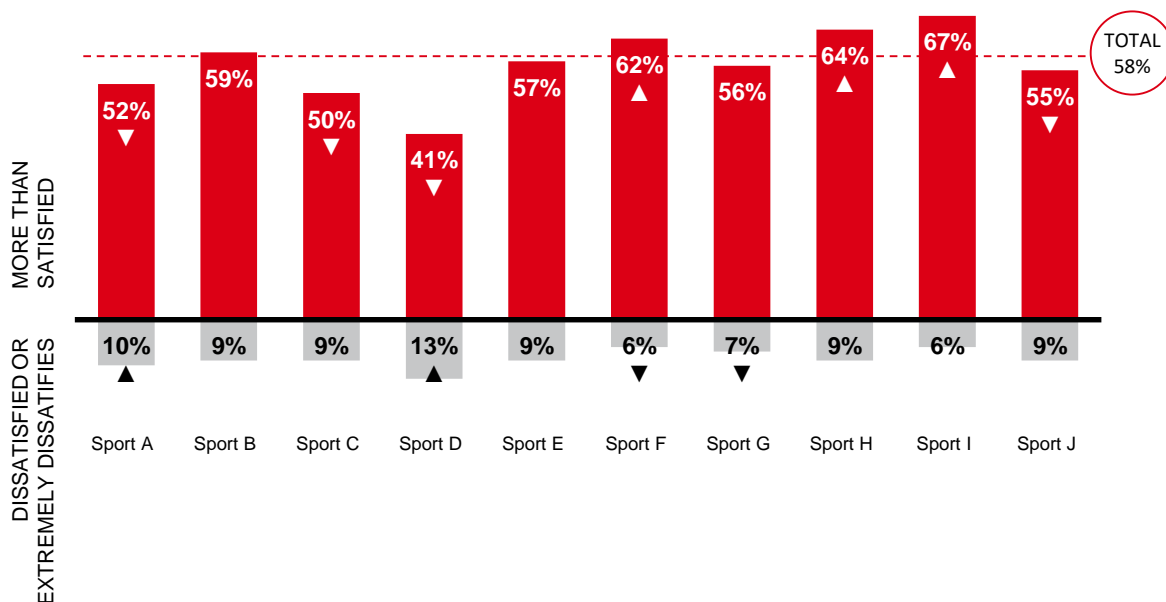
THREE IN FIVE ARE MORE THAN SATISFIED WITH THE PROCESS THEY GO THROUGH WHEN THEY JOIN

A significantly higher result than in 2016/17 (58% cf. 53%), a result of a significantly higher proportion that are *extremely satisfied* (31% cf. 26%).

JOINING PROCESS



NSO



Those **significantly more** likely to be more than satisfied with the joining process (average of four attributes) are:

- ▶ Coaches and managers (71% and 74%, respectively cf. 58% average)
- ▶ Those who play or train four or five times a week (61%)
- ▶ Those who have played for the top team at the club or higher representative honours (63%)
- ▶ Players (61% cf. 55% parents).

Those **significantly less** likely to be more than satisfied with the joining process (average of four attributes) are:

- ▶ Those who made a complaint in the past 3 months (31% cf. 58% average)
- ▶ Those who indicated *communications* (28%), *management of the club* (34%) or *quality of coaching* (40%) are areas for improvement (if fees increased)
- ▶ Those who mainly belong to *learn/improve skills* (56%)
- ▶ Those who play or train once a week or less (54%).

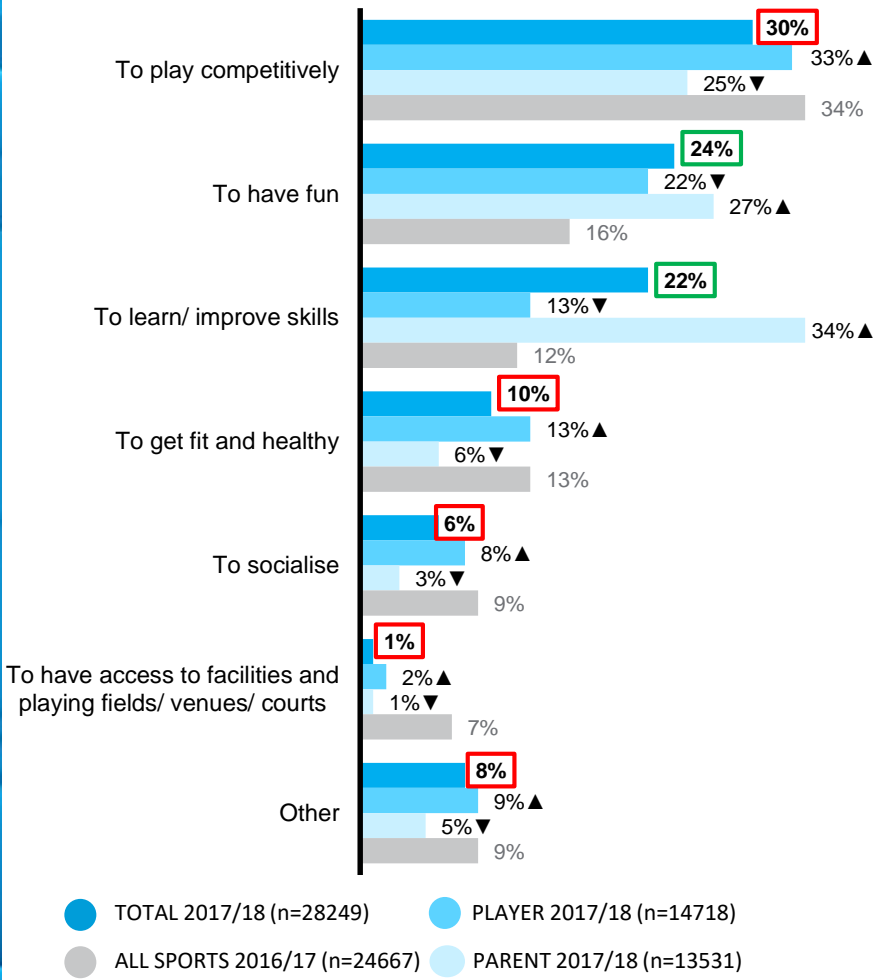
Base: All respondents who have been members for less than one year (Excluding Don't know/not applicable) (N=5392-5603)
Q20. Thinking about the process you/you and your child went through when you/your child joined your/their club. How satisfied are you with your/their club on the following...

▲▼ Significantly higher/lower than Total 2017/18
□ / □ Significantly higher/lower than All Sports 2016/17

MAIN FINDINGS

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

Parents, however, are significantly more likely than players to indicate the main reason their children belong to a club *to learn/improve skills* (34% cf. 13%).



Players (33%) are significantly more likely than parents of players (25%) to indicate *play competitively*.

OTHER REASONS TO BELONG TO A CLUB INCLUDE:

"Help out and be involved in my community."
Player, 19 years, Bay of Plenty, Sport J

"Love Sport I and want to learn how to coach and umpire properly."
Player & parent of player, 40-44 years, Southland, Sport I

"My son wanting to play Sport A knowing his dad and other family play this sport and it was available for his age group."
Parent, less than 5 years, Waikato, Sport A

"Trying to keep him focused rather than get into trouble."
Parent of player, 8-10 years, Wellington, Sport F

"I enjoy playing."
Player, 75+ years, Auckland, Sport C

"To support my community, sense of purpose."
Player, 30-34 years, Wellington-Wairarapa, Sport J

"In the beginning it was to learn how to play and learn basic skills and socialise. Now it's because I love the sport and my entire family is involved and I love coaching the kids."
Player & parent of player, 35-39 years, Auckland, Sport B

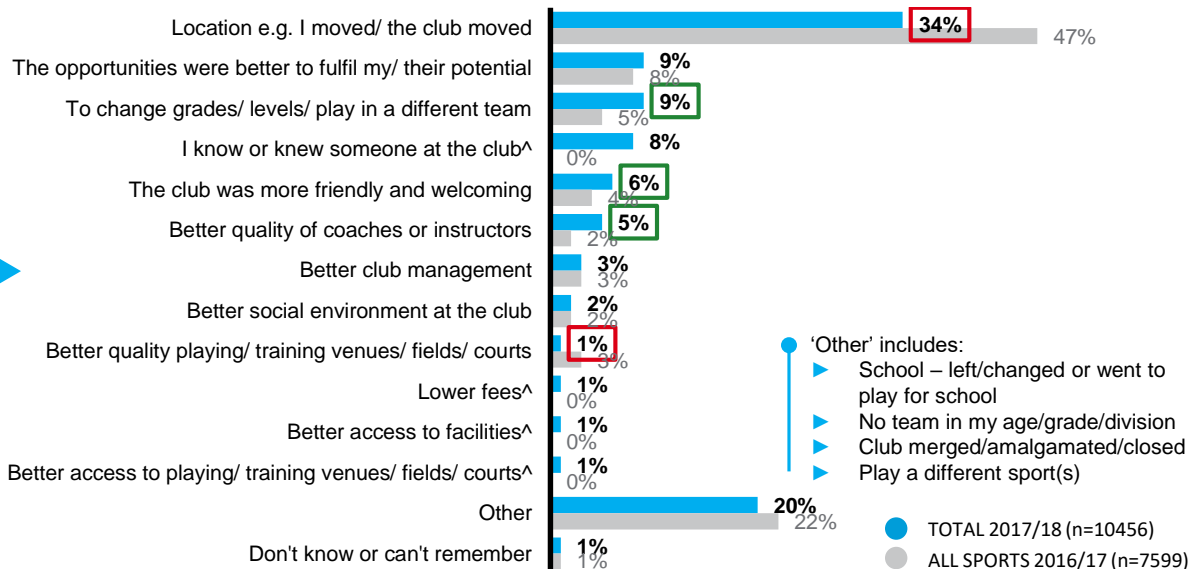
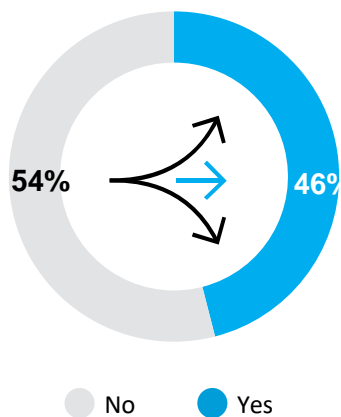
▲▼ Significantly higher/lower than Total 2017/18

□ / □ Significantly higher/lower than All Sports 2016/17

ALMOST HALF OF RESPONDENTS HAVE BEEN A MEMBER OF ANOTHER CLUB

A third changed club because they moved. A significantly higher proportion changed clubs in order to change grades/levels/play in a different team, because a [new] club was more friendly and welcoming, or there were better quality of coaches or instructors.

MEMBER OF ANOTHER CLUB



Those **significantly more** likely to have changed clubs are:

- ▶ Sport C (69% cf. 46% average), Sport D (64%), Sport E (58%) and Sport I (51%)
- ▶ Those who mainly belong to a club to *play competitively* (60%) or to *socialise* (52%)
- ▶ Dissatisfied (53%) and/or strongly disagree that it's value for money (57%)
- ▶ More likely to have made a complaint in the last 3 months (53%)
- ▶ Players (59% cf. 26% children whose parents responded on their behalf).

Those **significantly less** likely to have changed clubs are:

- ▶ Sport J (20% cf. 46% average), Sport F (32%), Sport B (35%), Sport A and Sport G (44%)
- ▶ Children whose parents responded on their behalf (26%)
- ▶ Those who mainly belong to a club to *learn/improve skills* (28%) or to *have fun* (36%)
- ▶ Members for 3-5 years (39%)
- ▶ Those who are more than satisfied (42%).

^ New statements added in 2017/18

Base: All respondents who are members (2017/18 n=29572, 2016/17 n=14982)

Q31. Have/Has you/your child ever been a member of another <NSO> club?

Base: All respondents who are members and used to belong to another club (2017/2018 n=10456, 2016/17 n=7599)

Q32. What is the **main** reason you/your child changed <NSO> clubs?

* New responses added in 2017/18

□ / □ Significantly higher/lower than All Sports 2016/17

WHAT THEY LOVE ABOUT THEIR CLUB

"The coaches are amazing! Go out of their way to make sure every kid is included and gets a turn. They make us feel involved as parents. They don't judge your child on their ability or lack of. Encourage everyone to have a good time."

Parent of player, 5-7 years, Waikato

"Family atmosphere. Teams I play in are inclusive and caring. The committee are a good group of hard working people of all ages. The club is small we encourage members to come to events to encourage a club spirit."

Player, 65-69 years, Canterbury

"What isn't to love? They always go the extra mile in everything they do with all age groups. My son is well supported, encouraged and extended to ensure he can be the best he can be. They offer great programmes including navigators, reps, individual sessions and holiday programmes all year round."

Parent of player, 15 years, Bay of Plenty

"They do everything for the ladies that are a part of the club! They provided everything we needed to be able to afford to register, travel and play.

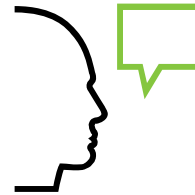
Communication within the club was the best. If there were any problems or dramas it was sorted out asap! Lovely people and lovely ladies who give the best support and open opportunities for you!

Loyalty is a major requirement too which is awesome!"

Player, 17 years, Waikato

"Everyone is very helpful and friendly. They go out of their way to make you feel valued and welcome. They have a couple of teams in every grade so are able to cater for any skill level and have great coaches to help you improve. Members of all different grades support each other whenever they see another of their club teams playing. Regardless if they actually know anyone on the team. This support makes the club community feel very inclusive and encouraging."

Player, 18 years, Auckland



"The club is extremely well run, friendly and have provided my child with great skills whilst making it fun. The skills my child has learned has given me more confidence too regarding their safety. We have had a fantastic summer and look forward to doing it all again next season."

Parent of participant, 8-10 years, Manawatu

"Includes all players from top level to the lower grades. Inclusive, ambitious and a great atmosphere."

Player, 35-39 years, Wellington-Wairarapa

"Only focused on juniors and has a very good approach to ensuring all kids regardless of skills and abilities are getting regular [Sport] at a level that suits them. Very much about participation."

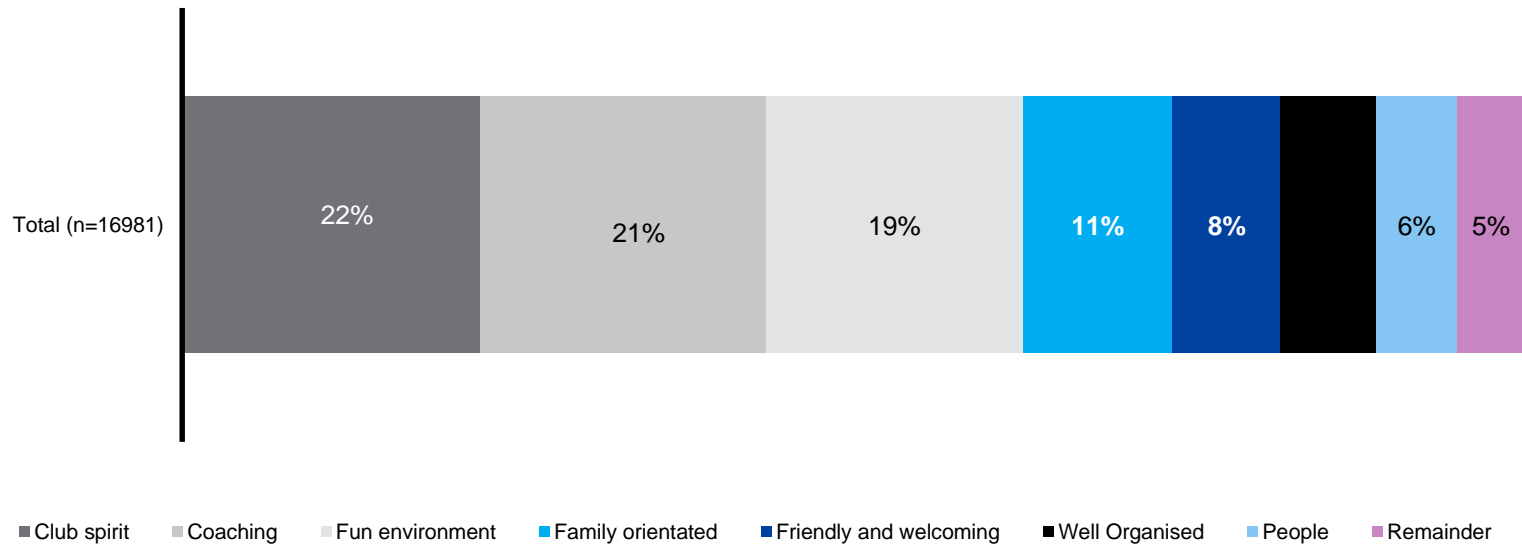
Parent of player, 11-12 years, Wellington-Wairarapa

"The friendly atmosphere and people. Encourage more participants to enjoy this friendly sport. Creates awareness of safety as well as promoting better lifestyle for all the whanau."

Participant, 45-49 years, Northland

WHAT THEY LOVE ABOUT THEIR CLUB

Text analysis of respondents comments was conducted on the summer sports and identified 8 key areas that members loved about their club.



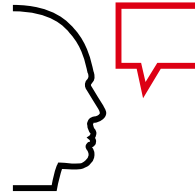
WHAT NEEDS TO IMPROVE TO INCREASE THE LIKELIHOOD OF RECOMMENDATION?

"It has a great environment for the younger kids as it's fun, but if you want to excel, I don't think [the club] allows you to."
Participant, 20-24 years, Bay of Plenty

"Larger pool of decent players for the age group; better central communication (get a website!); put a development programme together; reduce the costs which were significantly more than <...>."
Parent of player, 13years, Auckland

"Bullying needs to stop! Not everyone plays [Sport] to become a [national representative] and not everyone is as skilled as some of the top players. Some people also take things really personally on the field if they make a mistake and get shouted at. This is not ok and this club needs to learn to support each other and not put one another down."
Player, 20-24 years, Northland

"I have not brought these concerns to the attention of <...>: it doesn't strike me as the kind of place which is open to constructive criticism, particularly coming from a second division mother, in a club which is so big that it possibly has no choice but to focus only on its first division teams. I would simply make myself unpopular, and it would probably reflect badly on my child too."
Parent of player, 11-12 years, Auckland



"Consistency of coaching, and having a coach and training times that are regular from the beginning of the season. Communication between the coaching staff and assn. needs to be more transparent for the above to happen."
Player, 14 years, Waikato

"They do not support the women's teams - including; over ruling [Association] decisions on which [playing venue] has been identified and named on the draw, having their 'boys' take priority in changing rooms - moving women out. Having the KIDS take priority over the ladies on allocated fields and having KIDS play on the closed fields because 'they won't do as much damage'."
Player, 40-44 years, Auckland

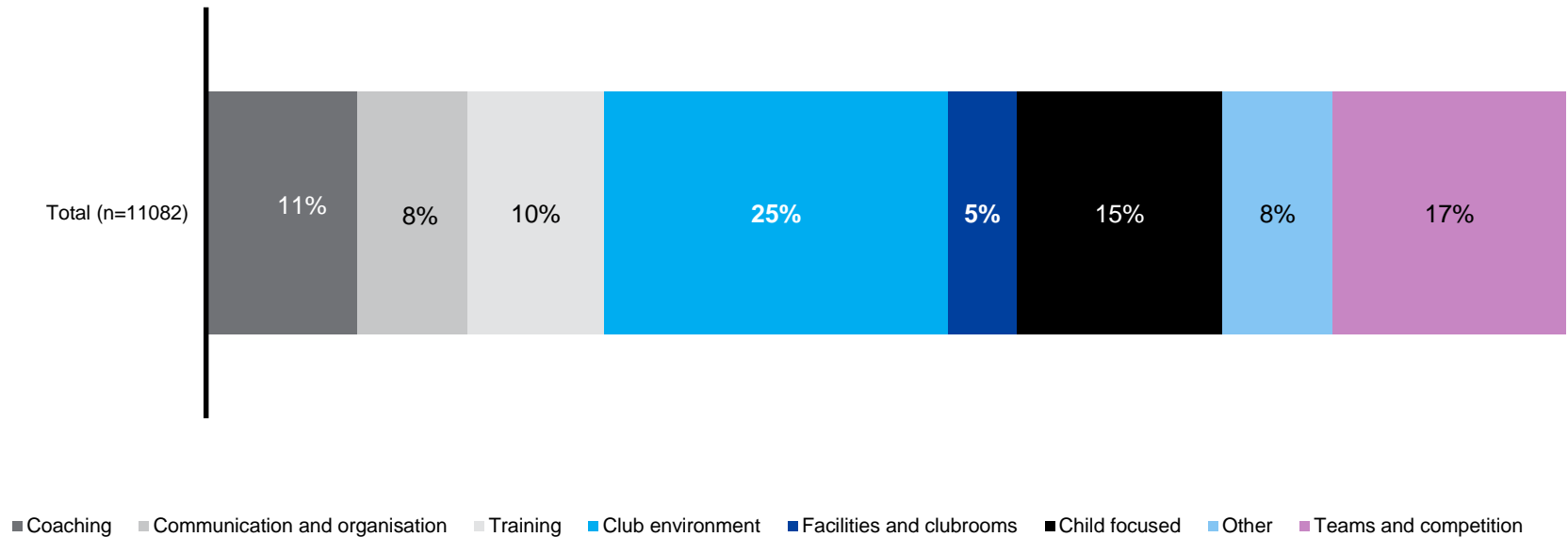
"More opportunities to improve competence and compete. More interesting practice sessions. More social club. Better communication e.g. active Facebook page or emails so we know what practice and race opportunities there are - currently seems very ad hoc and only last minute notice of races. There seems to be limited interest in new members."
Player, 40-44 years, Bay of Plenty

"Communication and organisation mainly. It's quite friendly but often people are left a bit in the dark as to what if any plans there are/planning is going on. Also there are few opportunities for cross team socialising which seems a shame."
Player, 30-35 years, Auckland

"Too many children in teams, not nearly enough game time, or good coaching to improve skills of players. Could have asked if some players wanted to play for another team, but they didn't. So a lot of parent's time wasted, child's confidence lost as they spend half the game on side lines. Child used to be into [Sport], but not anymore."
Parent of player, 11-12 years, Waikato

WHAT NEEDS TO IMPROVE TO INCREASE THE LIKELIHOOD OF RECOMMENDATION?

Text analysis of respondents comments was conducted on the summer sports and identified 8 key areas that members thought could improve with their club.



FEWER THAN ONE IN ELEVEN MADE A COMPLAINT TO THEIR CLUB IN THE LAST THREE MONTHS

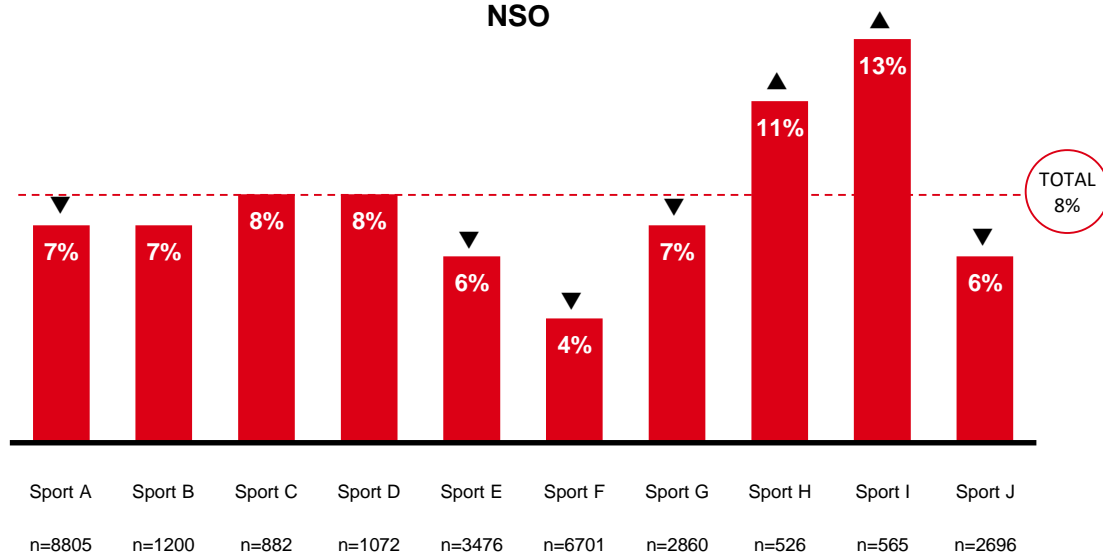
Respondents from two sports were significantly more likely to have made a complaint. While respondents from these sports are significantly more likely to have complained to their club in the past 3 months, they have relatively low levels of dissatisfaction (9% and 10%, respectively).

MADE A COMPLAINT IN THE LAST THREE MONTHS



● No/Can't say/Can't remember
● Yes

NSO



Those **significantly more** likely to have made a complaint are:

- ▶ Those who indicated *management of the club* (32% cf. 8% average), *communication* (12%) or *quality of coaching* (11%) are areas for improvement (if fees increased).
- ▶ Those who mainly belong to *have access to facilities and playing fields/venues/courts* (13%) or to *play competitively* (10%)
- ▶ Longer tenured members - more than 10 years (11%) or 6-10 years (10%).

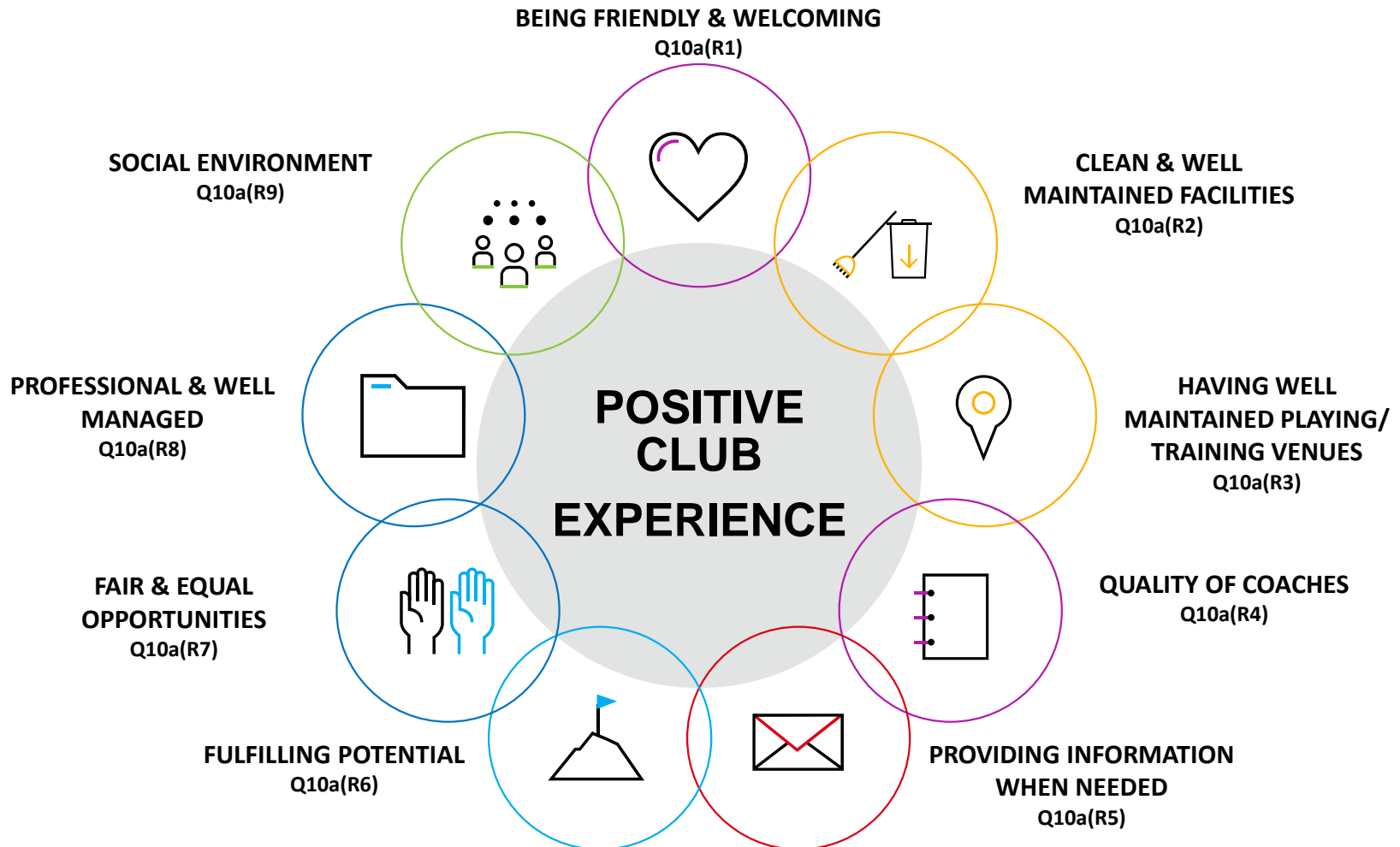
Those **significantly less** likely to have made a complaint are:

- ▶ Newer members - less than a year (5% cf. 8% average) or 1-2 years (6%)
- ▶ Those who mainly belong to *have fun* (6%) or *learn/improve skills* (6%).

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 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.

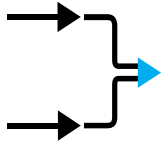
- ▶ Value for money (Q11)
- ▶ Encourages good sportsmanship and fair play (Q10b-R1)
- ▶ The ease of accessing the clubs venues/fields/courts for training or casual playing (Q10b-R2)
- ▶ Fostering a sense of pride in the club (Q10b-R3)
- ▶ Engaging with the local community (Q10b-R4)
- ▶ Being responsive 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:

- ▶ Making aware of development occurring in <sport> across New Zealand in terms of training, equipment, new programmes, coaching and officiating, club and event management (Q10b-R8)
- ▶ Providing information and opportunities for coach development (Q10b-R9)
- ▶ Providing information and opportunities for officials development (Q10b-R10)
- ▶ Providing information about junior programmes (Q10b-R11).

Note: There were seventeen drivers in total for 2017/18. Attributes R13, R14, R18-R21 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.

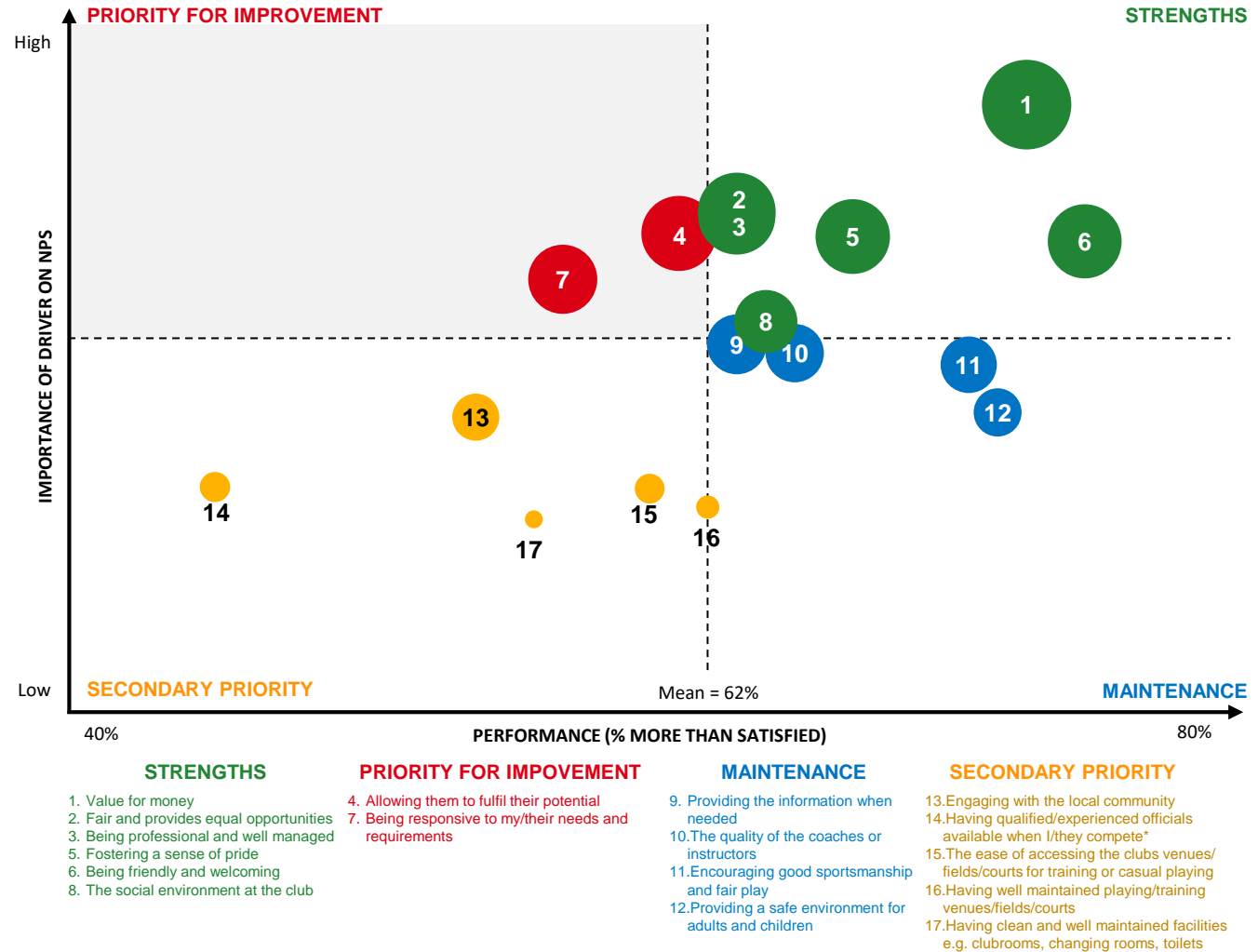
The following chart shows the impact of each attribute/driver on a respondent's likelihood to recommend their club. The importance or impact of a driver on recommendation is shown on the vertical axis along with the size of the bubble (from the regression model). How respondents are rating their satisfaction 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.

DRIVERS OF RECOMMENDATION (NPS)

For 2017/18 participating NSOs, the top three drivers of recommendation are:

1. Value for money
2. Fair and provides equal opportunities
3. Being professional and well managed

Allowing me to fulfil my potential, which was ranked second in 2016/17, is not in the top three in 2017/18. While performance has typically improved, allowing me to fulfil my potential and responsiveness to members needs and requirements remain the drivers where emphasis should be placed due to relatively lower performance and above average importance.



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

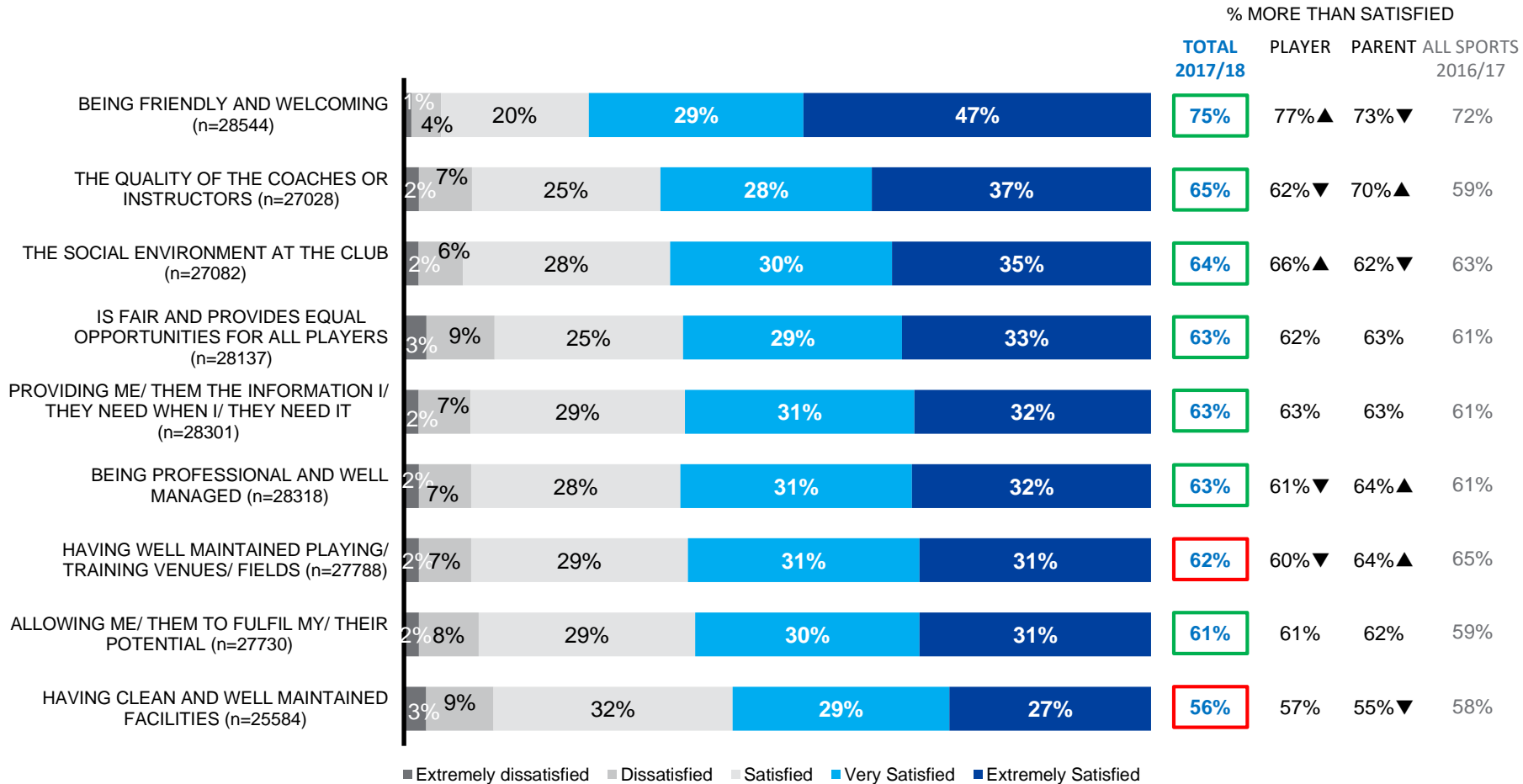
Q7. Imagine someone is interested in playing or participating in <sport>. If they asked you, how likely are you to recommend your/your child's club to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

* 2017/18 results include Q10(R6) *Having qualified/experienced officials available when I/they compete*. In 2016/17, attributes that excluded greater than 30% of respondents were not included.

For a comparison to 2016/17, please refer to the regression in the [Appendix](#).

THE RELATIVE STRENGTH OF CLUBS IS BEING FRIENDLY & WELCOMING

Overall, results in relation to the key drivers of club experience are significantly higher than in 2016/17 with the exception *having well maintained playing/training venues and clean and well maintained facilities* – which are significantly lower.



■ Extremely dissatisfied ■ Dissatisfied ■ Satisfied ■ Very Satisfied ■ Extremely Satisfied

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

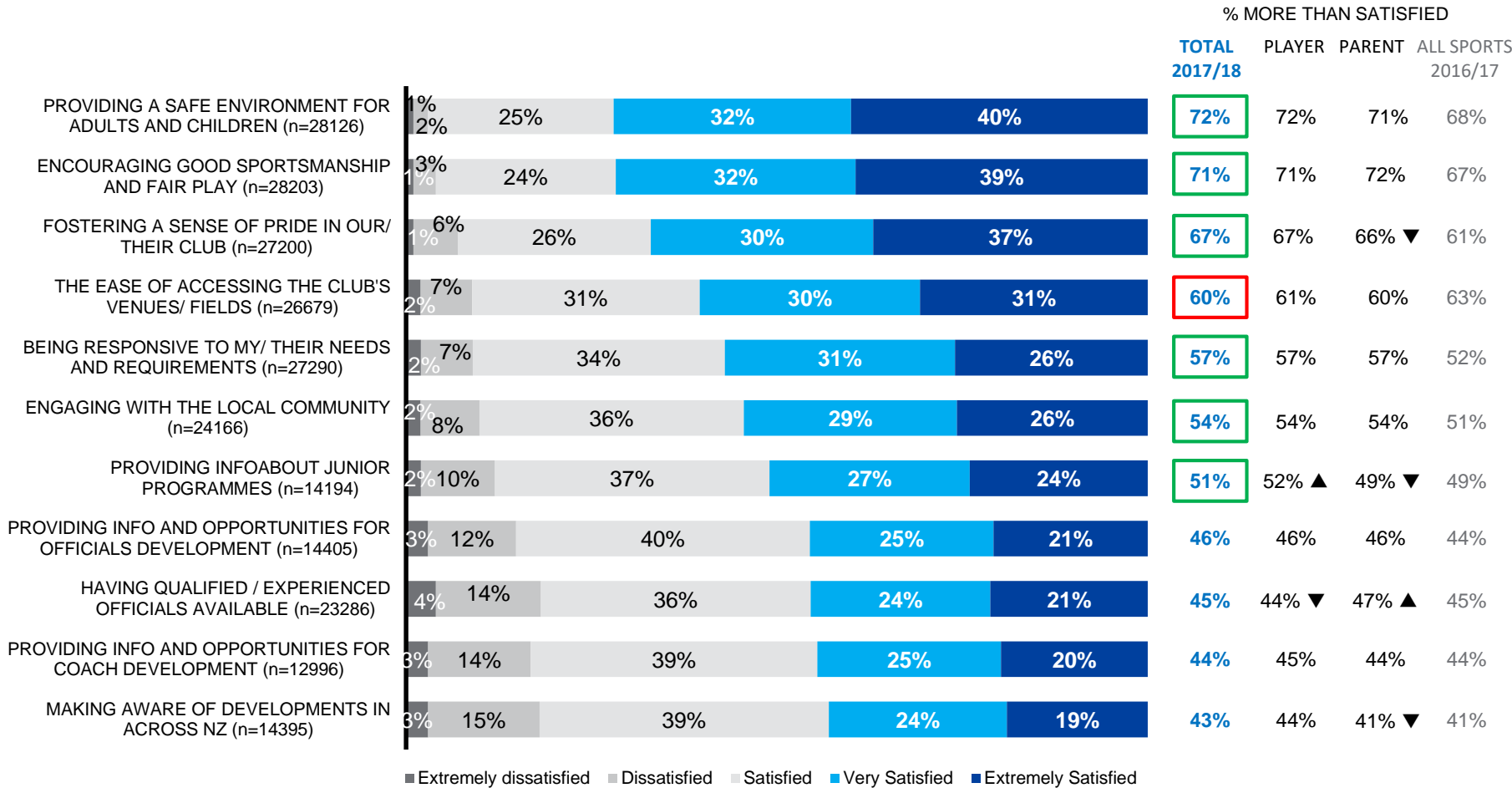
Q10a. How would you/your child rate your/their overall satisfaction with your/their 2017/18 club on each of the following...

▲▼ Significantly higher/lower than Total 2017/18

□ / □ Significantly higher/lower than All Sports 2016/17

SATISFACTION: SECONDARY DRIVERS

Similarly to the key drivers, 2017/18 respondents are significantly more likely to be more than satisfied with the secondary drivers of the club experience. There is little difference between players and parents of players in their level of satisfaction except *providing info about junior programmes* and *quality of officiating*.



■ Extremely dissatisfied ■ Dissatisfied ■ Satisfied ■ Very Satisfied ■ Extremely Satisfied

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

Q10b. How would you rate your/your child's overall satisfaction with your/their 2017/18 club on each of the following...

▲▼ Significantly higher/lower than Total 2017/18

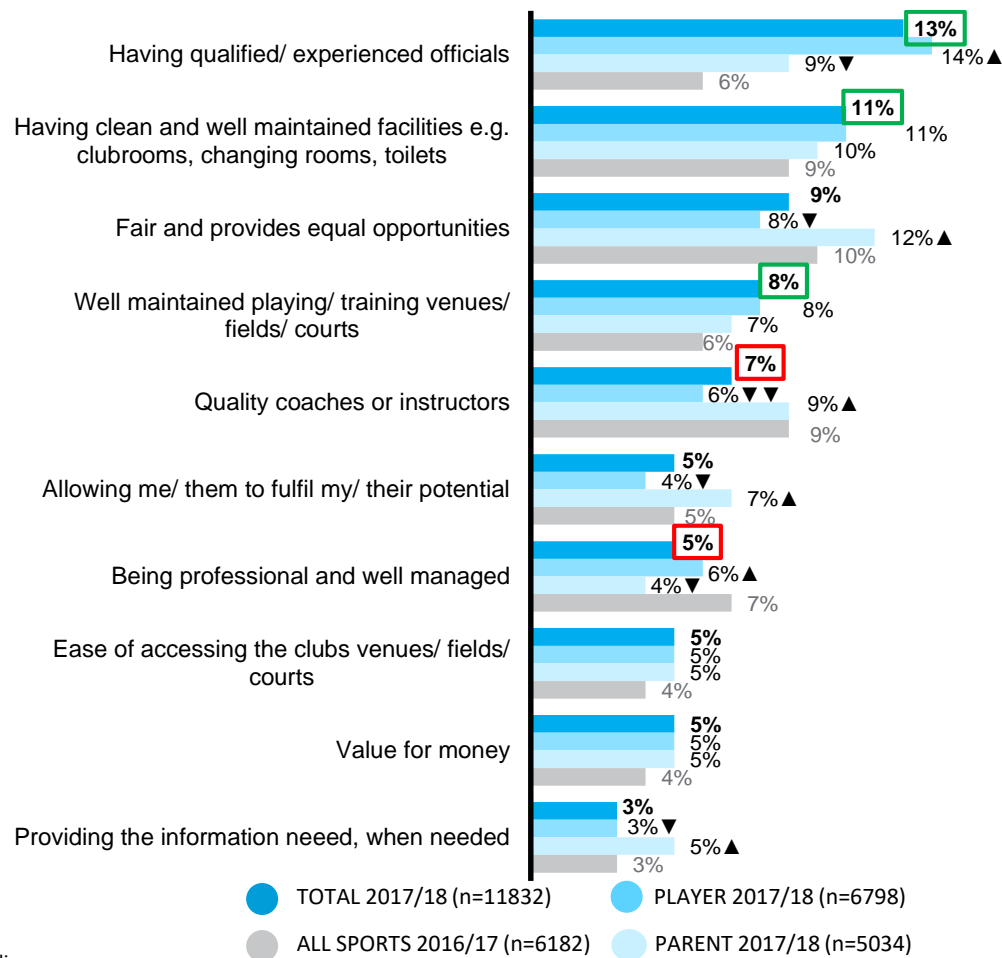
□ / □ Significantly higher/lower than All Sports 2016/17

OF THE DRIVERS OF CLUB EXPERIENCE, RESPONDENTS ARE LEAST SATISFIED WITH OFFICIATING

Parents remain least satisfied with *fair & equal opportunities*.

Having qualified/experienced officials available when I/they compete has taken over from fair and provides equal opportunities for all players as the aspect respondents are least satisfied with. This is significantly higher than 2016/17 (13% cf. 6%).

Having clean and well maintained facilities e.g. clubrooms, changing rooms, toilets and well maintained playing/training venues/fields/courts are aspects both significantly more likely in 2017/18 to be an aspect respondents are least satisfied with.



Base: All respondents who are dissatisfied/extremely dissatisfied or disagree/strongly disagree Q12a. Thinking about what you rated lower in previous questions, please select which one aspect of your/your child's club that you/they are **least** satisfied with?
 Note: Only top ten areas shown

WHAT NEEDS TO IMPROVE TO INCREASE SATISFACTION?

"Club as a whole, we have minimal social environment due to the club rooms not being open after our games. We also have a small senior section but it would be great to find out how the junior teams do every week."

Player, 20-24 years, Canterbury

"Proper grading of players. The mismatch of player ability is of no benefit to anyone. The lower level players become disillusioned and the more advanced players learn nothing."

Parent of player, 8-10 years, Auckland

"I think the club needs to be more careful in ensuring the people who coach are actually suited to coaching."

Parent of player, 5-7 years, Wellington-Wairarapa

"For all teams to be treated equal and be given the same opportunities both on and off the field i.e. training conditions and gear which makes you feel as if you belong to the club."

Player, 25-29 years, Canterbury

"Online access to competition schedule and draws."

Player, 40-44 years, Auckland

"Regular trainings to help the 'not so good players' learn the basic skills required in competitive [Sport]. Need to feel wanted as a player and developed. All trainings and development go into the rep players only."

Parent of player, 14 years, West Coast

"If there were qualified and experienced referees then this would save the coaches having to ref their own team's home games and then getting called biased, etc causing arguments between coaches, teams, tension, etc."

Parent of player, 8-10 years, Otago

"A training programme and knowledgeable coaches."

Parent of player, 11-12 years, Auckland

"More support for coaches in how to coach in a positive and encouraging manner in order to gain the most out of the players and develop the love of [Sport]. Maybe have senior players helping out or buddy senior teams with the junior teams."

Parent of player, 8-10 years, Canterbury

"There needs to be more clinics available for game officials for the junior teams as it is generally parents who officiate and they need as much guidance and access to experienced officials as possible to provide an acceptable standard of [officiating]."

Parent of player, 13 years, Auckland

"Club [Sport] is a fantastic game that unfortunately is repeatedly ruined by 'us vs them' cheating and verbal abuse, and I believe proper neutral [officiating] would for the most part remove this from the game."

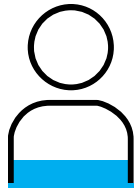
Player, 40-44 years, Auckland

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

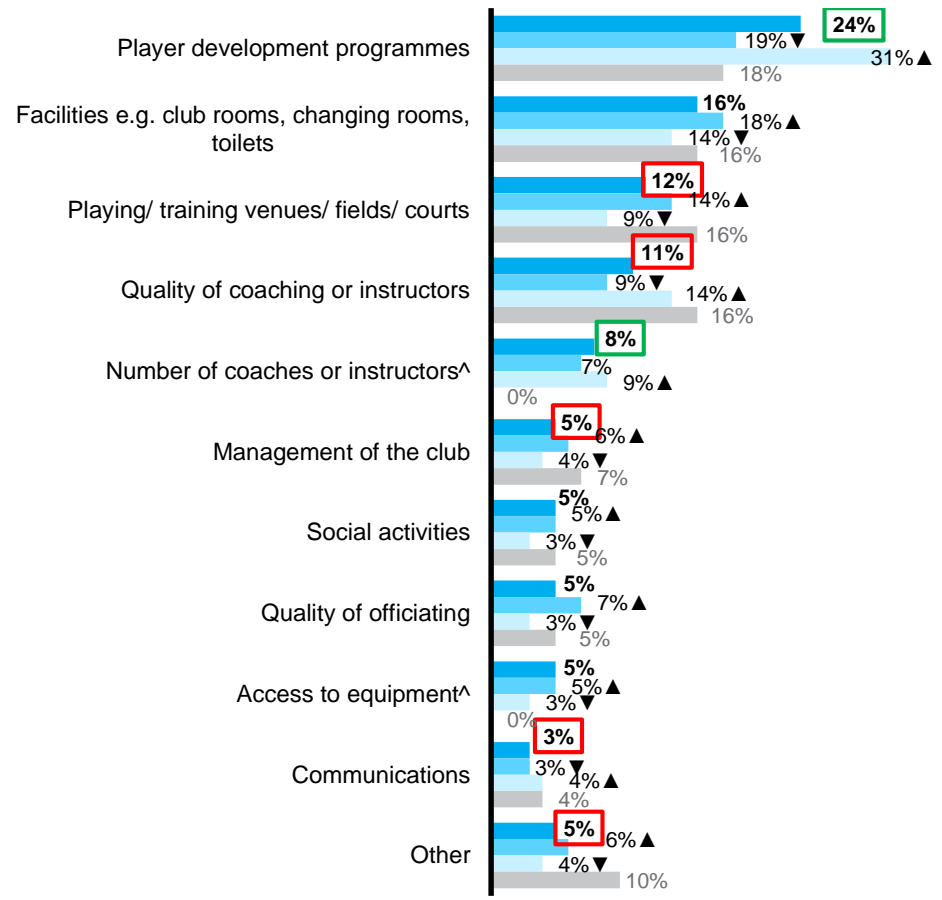
Parents of players were significantly more likely than players to indicate this aspect (31% cf. 19%).

This is followed by *facilities e.g. club rooms, changing rooms, toilets* (16%) and *playing/training venues* (12%).

Although there is relative dissatisfaction with the *quality of officiating* (the aspect respondents are least satisfied with— particularly among players), there is a relatively lower proportion who indicated they would want any investment to go toward this aspect if fees increased (5%).



12% would not want anything improved if it meant their fees were increased. This is significantly lower than the average for all sports in 2016/17 (15%).



● TOTAL 2017/18 (n=22567) ● PLAYER 2017/18 (n=11955)
 ● ALL SPORTS 2016/17 (n=18589) ● PARENT 2017/18 (n=10612)

▲ ▼ Significantly higher/lower than Total 2017/18

□ / □ Significantly higher/lower than All Sports 2016/17

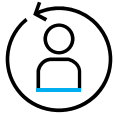
Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase)
 Q14. If your/your child's <sport> club was going to focus on improving one of the following aspects, and the membership fees increased to reflect this investment, which would be the one thing you/your child would like them to improve?

^ Not asked in 2016/17

INVESTMENT AREAS (IF FEES INCREASED)

Those who are significantly more likely to indicate they would want improvement in the following areas, if fees were to increase:

24%



PLAYER DEVELOPMENT PROGRAMMES

- ▶ Members who mainly belong to a club to *learn/improve skills* (31% cf. 24%) or to *play competitively* (26%)
- ▶ New members (less than 1 year) (28%) or members for 1-2 years (26%)
- ▶ Those who play/train four or five times a week (27%)
- ▶ Those who have played for the top team at their club (26%).

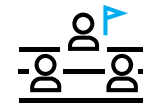
16%



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

- ▶ Those who play/train less than once a week (23% cf. 16%)
- ▶ Committee members (22%)
- ▶ Members who mainly belong to a club to *socialise* (20%) or to *have fun* (18%)
- ▶ Members for more than 10 years (18%).

12%



PLAYING/TRAINING VENUES/FIELDS

- ▶ Those who are paid employees (27% cf. 12%)
- ▶ Members who mainly belong to a club to *have fun* (14%) or to *play competitively* (14%).

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=22567)

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?

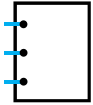
Note: Top nine areas shown

▲▼ Significantly higher/lower than Total 2017/18

INVESTMENT AREAS (IF FEES INCREASED)

Those who are significantly more likely to indicate they would want improvement in the following areas, if fees were to increase:

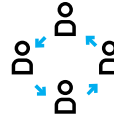
11%



QUALITY OF COACHING OR INSTRUCTORS

- ▶ Those who made a complaint (14% cf. 11%)
- ▶ Members for 3-5 years (13%)
- ▶ Members who mainly belong to a club to *learn/improve skills* (13%).

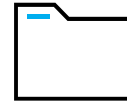
8%



NUMBER OF COACHES OR INSTRUCTORS

- ▶ Club presidents or other office holders (13% cf. 8%)
- ▶ Members who mainly belong to a club to *get fit & healthy* (10%).

5%



MANAGEMENT OF THE CLUB

- ▶ Those who made a complaint (20% cf. 5%)
- ▶ Those who play/train four or five times a week (8%)
- ▶ Members who mainly belong to a club to *play competitively* (7%)
- ▶ Members for more than 5 years (7%).

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=22567)

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?

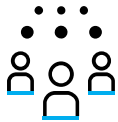
Note: Top nine areas shown

▲▼ Significantly higher/lower than Total 2017/18

INVESTMENT AREAS (IF FEES INCREASED)

Those who are significantly more likely to indicate they would want improvement in the following areas, if fees were to increase:

5%



SOCIAL ACTIVITIES

- ▶ Members who mainly belong to a club to *socialise* (9% cf. 5%)
- ▶ Those who play/train less than once a week (8%).

5%



QUALITY OF OFFICIATING

- ▶ Officials/referees/umpires/judges (10% cf. 5%) and/or coaches or instructors (8%)
- ▶ Members for more than 10 years (9%)
- ▶ Members who mainly belong to a club to *socialise* (9%) or to *play competitively* (7%)
- ▶ Those who play/train less than once a week (7%).

5%



ACCESS TO EQUIPMENT

- ▶ Team managers (8% cf. 5%).

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=22567)

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 nine areas shown

▲▼ Significantly higher/lower than Total 2017/18

TOP THREE AREAS FOR IMPROVEMENT – VARIES BY NSO BUT PLAYER DEVELOPMENT HAS GREATEST DEMAND FOR MOST SPORTS

If fees were to increase, respondents of each NSO 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 (21%) | Player development programmes (27%) | Player development programmes (25%) | Player development programmes (24%) | Player development programmes (20%) | Player development programmes (31%) | Player development programmes (24%) | Facilities e.g. club rooms, changing rooms, toilets (24%) | Player development programmes (27%) | Facilities e.g. club rooms, changing rooms, toilets (33%) |
| 2 | Playing/training venues/ fields (17%) | Facilities e.g. club rooms, changing rooms, toilets (24%) | Playing/training venues/ courts (19%) | Quality of officiating (19%) | Quality of coaching (17%) | Facilities e.g. club rooms, changing rooms, toilets (17%) | Playing/ Training venues/ fields (19%) | Player development programmes (24%) | Quality of coaching (14%) | Number of coaches or instructors (11%) |
| 3 | Quality of coaching (16%) | Quality of coaching (10%) | Number of coaches (10%) | Playing/training venues/ courts (15%) | Playing/training venues/ fields (14%) | Quality of coaching (12%) | Facilities e.g. club rooms, changing rooms, toilets (13%) | Number of coaches or instructors (11%) | Playing/training venues/ fields (13%) | Player development programmes (11%) |

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my feed need to increase) (n=22567)
 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

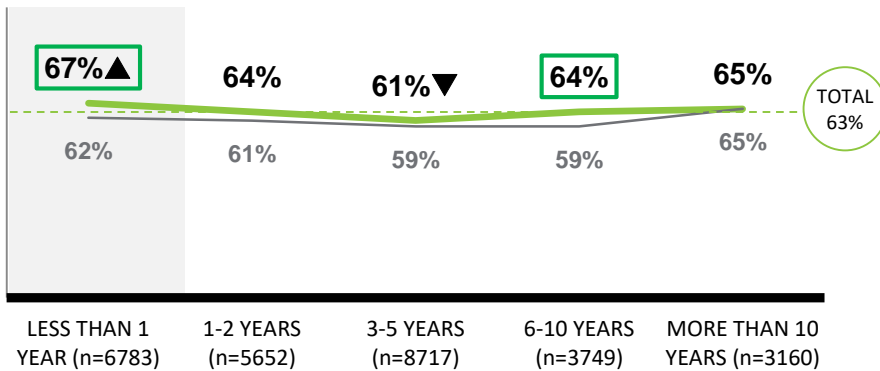
LENGTH OF MEMBERSHIP & THE JOINING PROCESS

KEY METRICS: LENGTH OF MEMBERSHIP

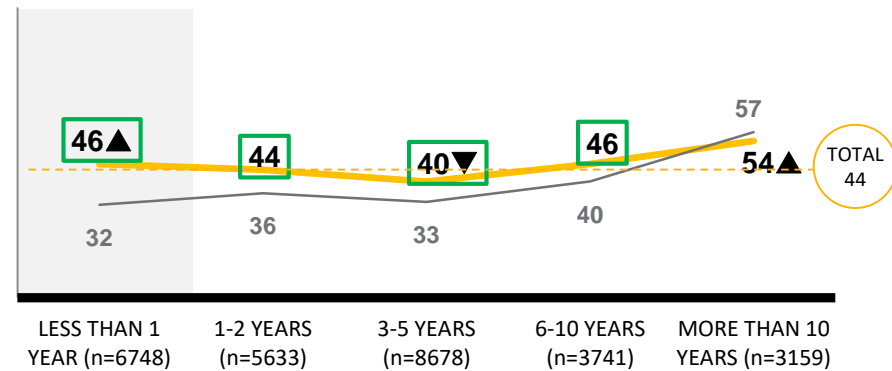
Overall, results are more positive across the length of membership when compared with 2016/17, and particularly for new members (members for less than one year). However, perceptions of value for money has dropped for those who have been members for six to ten years.

Looking at the results for 2017/18, it is the members who are in the middle (i.e. members for 3-5 years or 6-10 years) where results are lower for the key metrics.

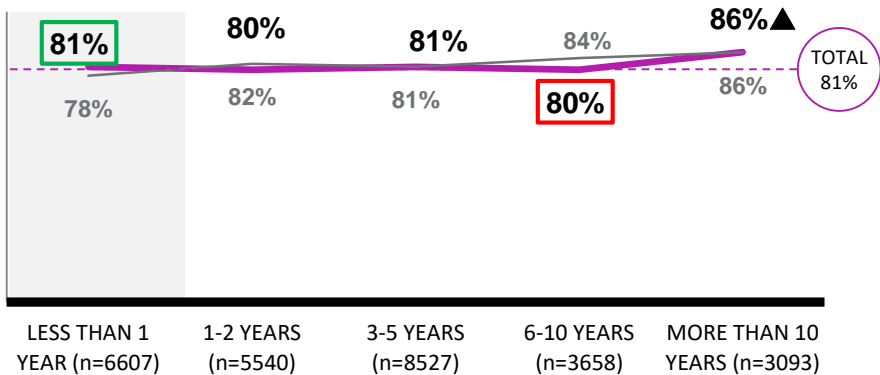
OVERALL SATISFACTION



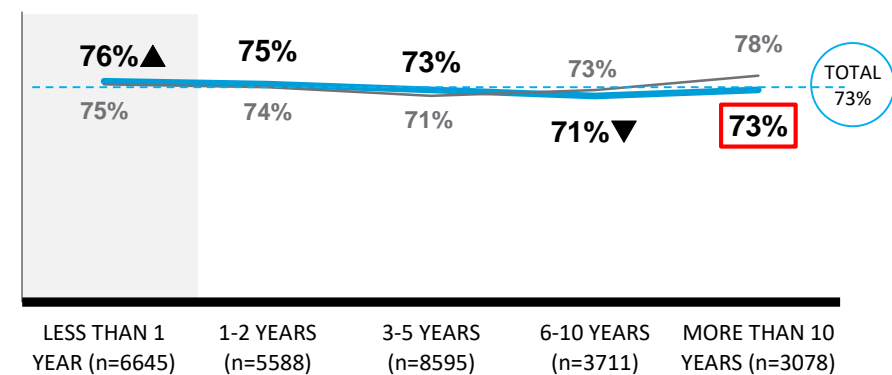
NPS



LIKELIHOOD TO REJOIN

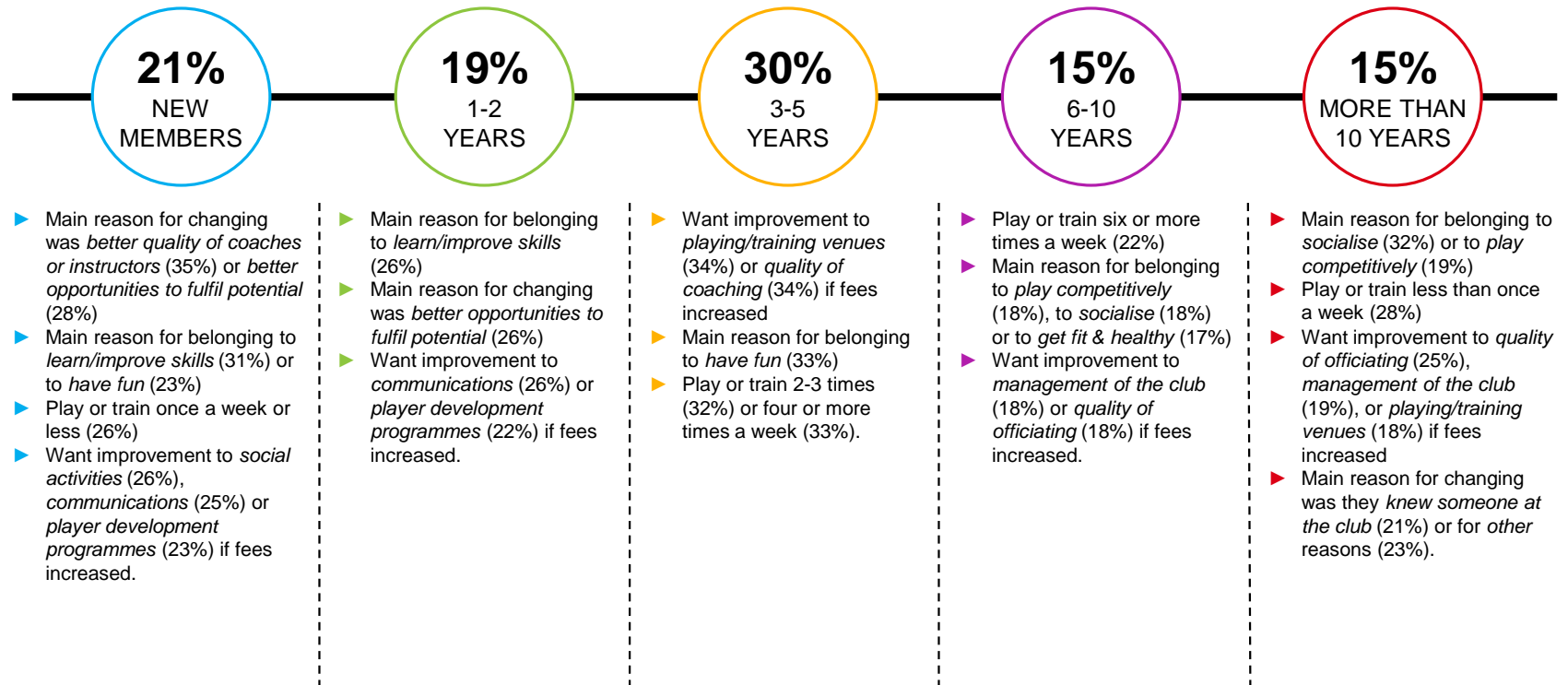


VALUE FOR MONEY



DIFFERENCE IN LENGTH OF MEMBERSHIP

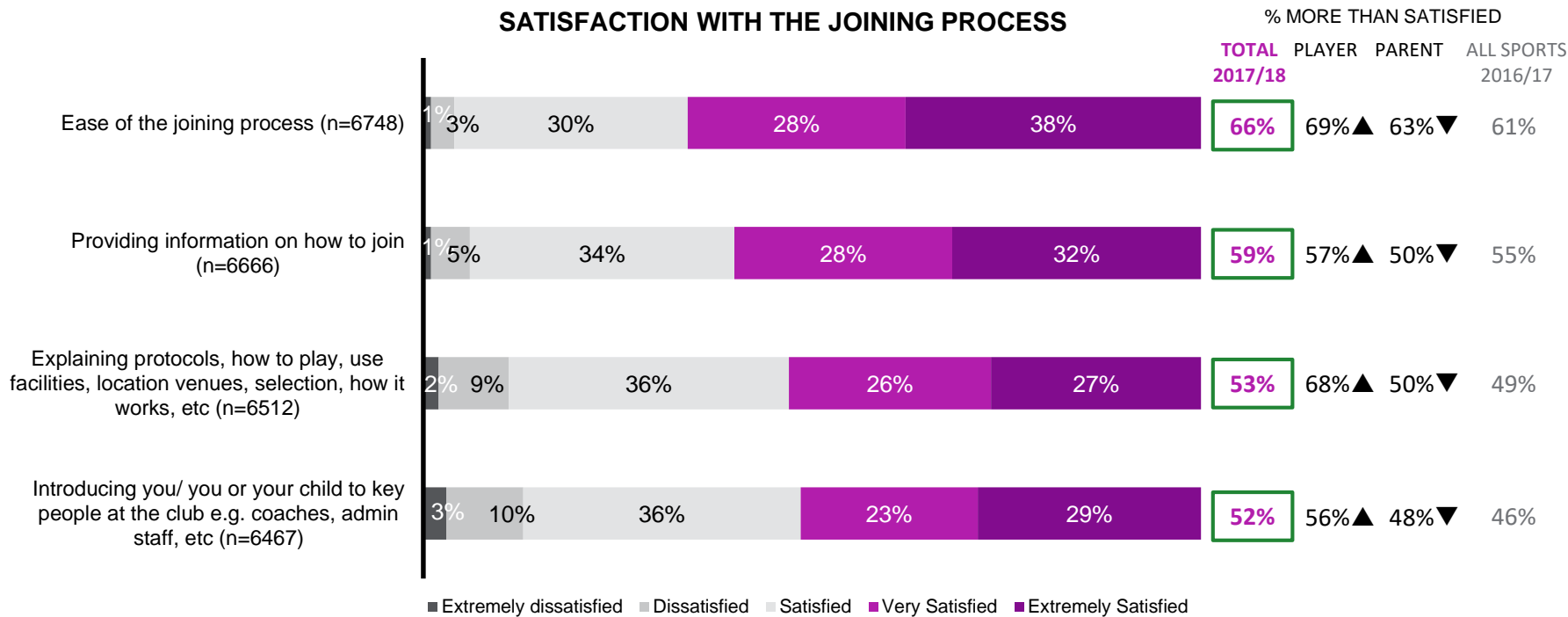
Those who are significantly more likely to be in the following tenure groups, are those who:



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

Results are significantly higher than in 2016/17- due to significantly higher proportions of 'extremely satisfied' ratings.

Players are significantly more likely to be *more than satisfied* with each aspect of the joining process compared to parents of players (63% cf. 53%, average of four attributes).



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)

▲▼ Significantly higher/lower than Total 2017/18
 □ / □ Significantly higher/lower than All Sports 2016/17

INJURY MANAGEMENT

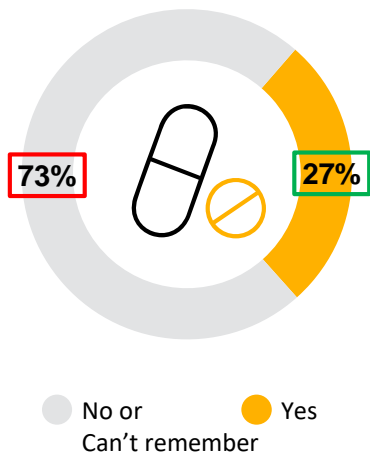
IN THE LAST 12 MONTHS, MORE THAN A QUARTER OF RESPONDENTS HAVE BEEN INJURED

A significantly higher proportion compared with 2016/17 (27% cf. 21%).

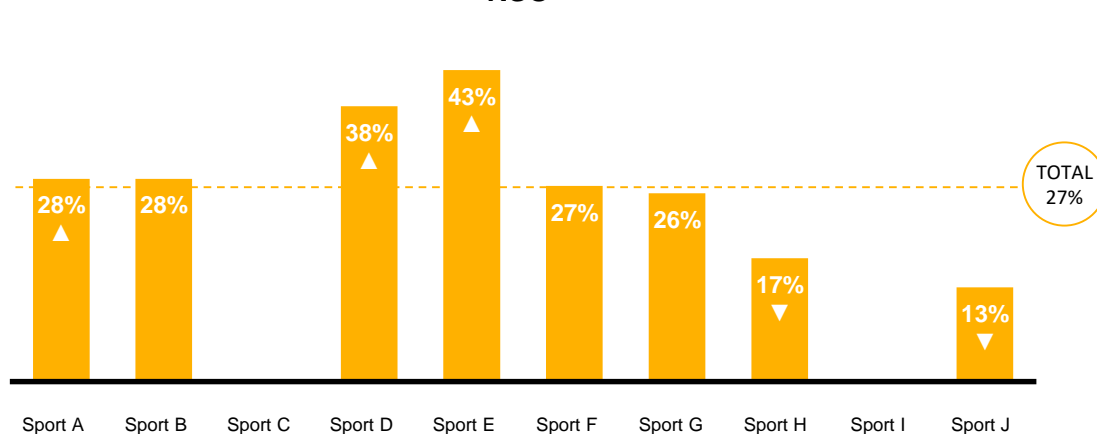
Of those who were injured, almost two-thirds (63%) made an ACC claim.

Two sports have significantly higher proportion of respondents that indicated they sustained an injury from playing or training.

RESPONDENTS INJURED IN THE LAST 12 MONTHS



NSO



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

- ▶ In the young adult (20-34) (42%), 35-54 (36%) or secondary school age bracket (13-18) (33%)
- ▶ Those who mainly belong to *play competitively* (38%) or *socially* (33%)
- ▶ Those who play or train four or more times a week (36%)
- ▶ Somewhat or very unlikely to rejoin (34% and 31%, respectively)
- ▶ Those who have played for the top team in their grade or higher (34%).

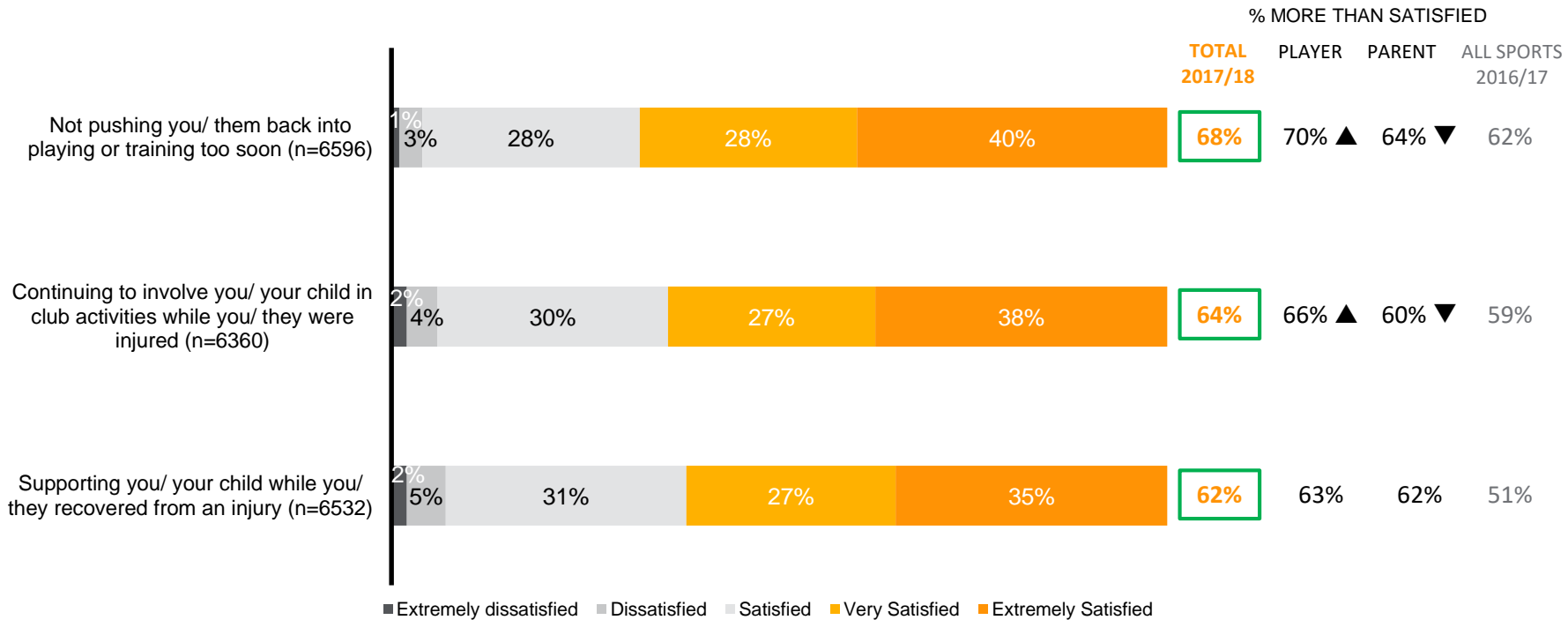
Respondents **significantly less** likely to have been injured in the last 12 months are:

- ▶ Those who mainly belong to *learn/improve skills* (18% cf. 27% average)
- ▶ Those who play or train once a week or less (20%).

RESPONDENTS ARE GENERALLY SATISFIED WITH HOW THEIR CLUB MANAGED THEIR INJURY

Results are significantly higher than the average for all sports in 2016/17.

Parents, however, are less enthused - evidenced by the significantly lower proportion who are more than satisfied with *not pushing them back into playing/training too soon* or *continuing to involve their child while they were injured*.



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

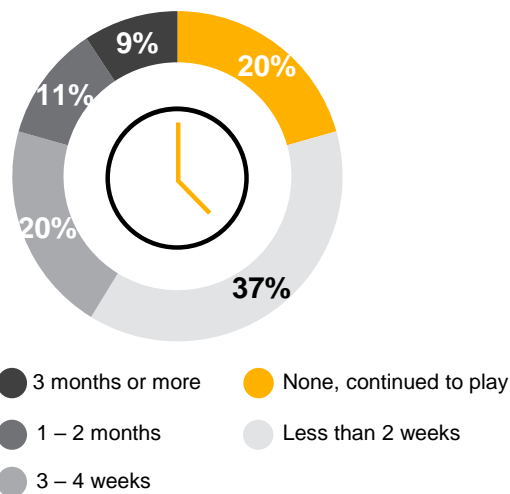
▲▼ Significantly higher/lower than Total 2017/18

□ / □ Significantly higher/lower than All Sports 2016/17

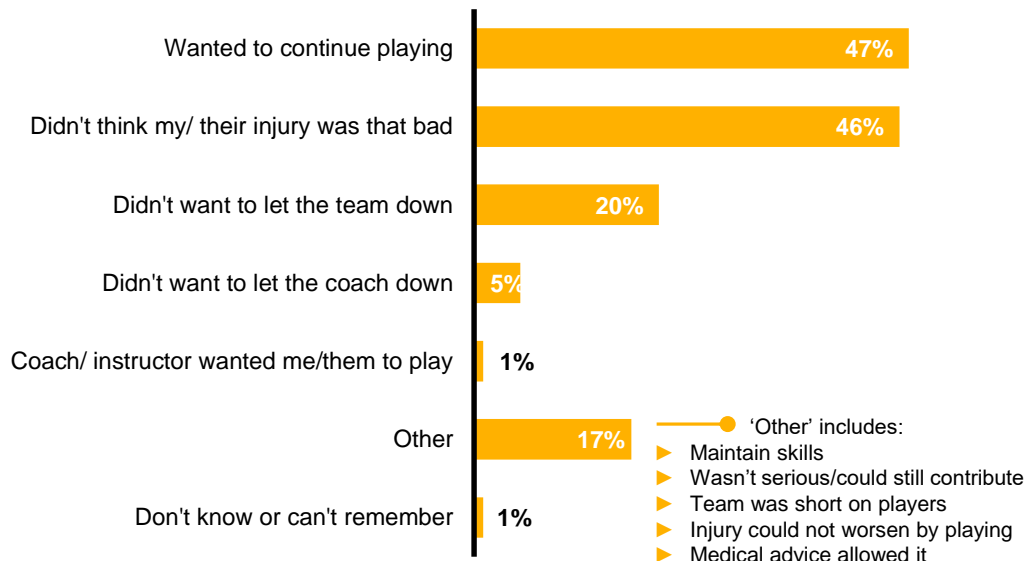
ONE IN FIVE DID NOT MISS ANY TIME PLAYING OR TRAINING DESPITE BEING INJURED

Conversely, one in five missed playing or training for more than a month due to their injury.

TIME MISSED DUE TO INJURY



WHY DID THEY CONTINUE TO PLAY WHILE INJURED



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

- ▶ Primary/intermediate age (5-12 years) (35% cf. 20% average)
- ▶ Those who mainly belong to *learn/improve skills* (25%) or *have fun* (23%)
- ▶ New members (less than a year) (24%) or 1-2 years (23%)
- ▶ Female (23% cf. 19% male).

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

- ▶ Members for more than 10 years (15% cf. 20% average)
- ▶ Those who belong mainly to *play competitively* (17%)
- ▶ Those who play or train four or more times a week (17%)
- ▶ Those who have played for the top team at the club or higher representative honours (18%).

Base: All respondents who have been injured in the last 12 months (Excluding Don't know/not applicable) (n=7716)

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=1520)

Q39. Why did you/they continue to play while you/they were injured?

▲▼ Significantly higher/lower than Total 2017/18

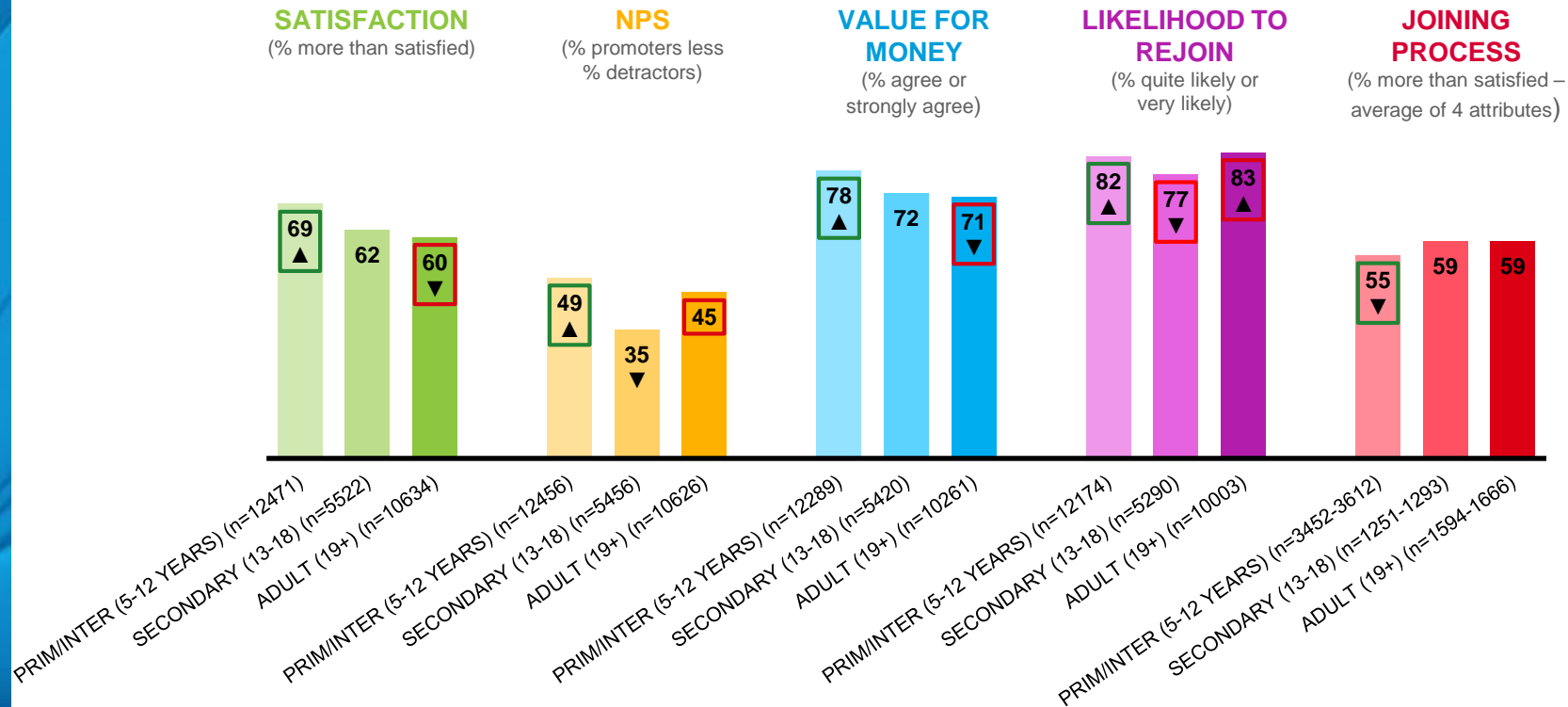
□ / □ Significantly higher/lower than All Sports 2016/17

DEMOGRAPHIC DIFFERENCES

OVERALL, RESULTS ARE HIGHEST AMONG PRIMARY/INTERMEDIATE AGED CHILDREN

– Except for likelihood to rejoin (although still high and significantly higher than 2016/17).

Adults rate their club experience significantly less positive in terms of overall satisfaction and perceived value for money. Although more than three quarters of those of secondary school age (13-18 years) are likely to rejoin, retention is lowest among this age bracket.

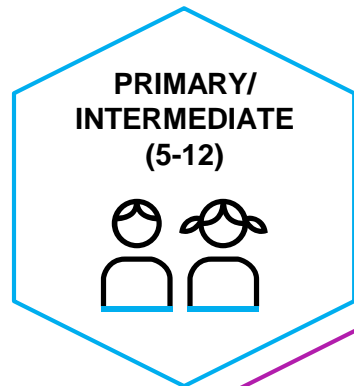


Base: Q6/Q7/Q11 All Respondents (Excluding Don't know/Can't say), Q9 Members (Excluding Don't know/Can't say), Q20 New Members (Excluding Don't know/Can't say)
 Q6/Q7/Q11/Q9/Q20 (Average of four attributes)
 2016/17 age bands were slightly different

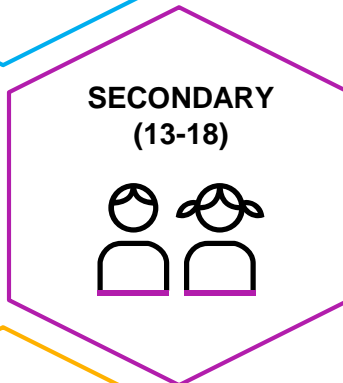
▲▼ Significantly higher/lower than Total 2017/18
 □ / □ Significantly higher/lower than All Sports 2016/17

KEY DIFFERENCES: AGE BRACKETS

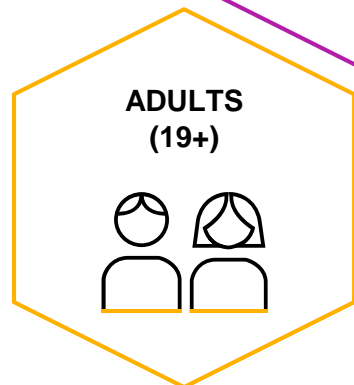
Compared to the total for 2017/18, the following age brackets are significantly more likely to:



- ▶ Belong to a club to *learn/improve skills* (38% cf. 22% average) or *have fun* (32% cf. 24%)
- ▶ Play or train 2-3 times a week (69% cf. 56%)
- ▶ Be more than satisfied with the following key drivers
 - ▶ Having well maintained playing/training venues/fields/courts (66% cf. 62%)
 - ▶ The quality of the coaches or instructors (72% cf. 65%)
 - ▶ Providing me/them the information I/they need when I/they need it (66% cf. 63%)
 - ▶ Allowing me/them to fulfil my/their potential (65% cf. 61%) fair and provides equal opportunities for all players (68% cf. 63%)
 - ▶ Being professional and well managed (67% cf. 63%)
- ▶ Want investment to *player development programmes* (30% cf. 24%) if fees increased
- ▶ Be more ethnically diverse – NZ European (73% cf. 69%), Māori (27% cf. 24%), Samoan (8% cf. 5%).



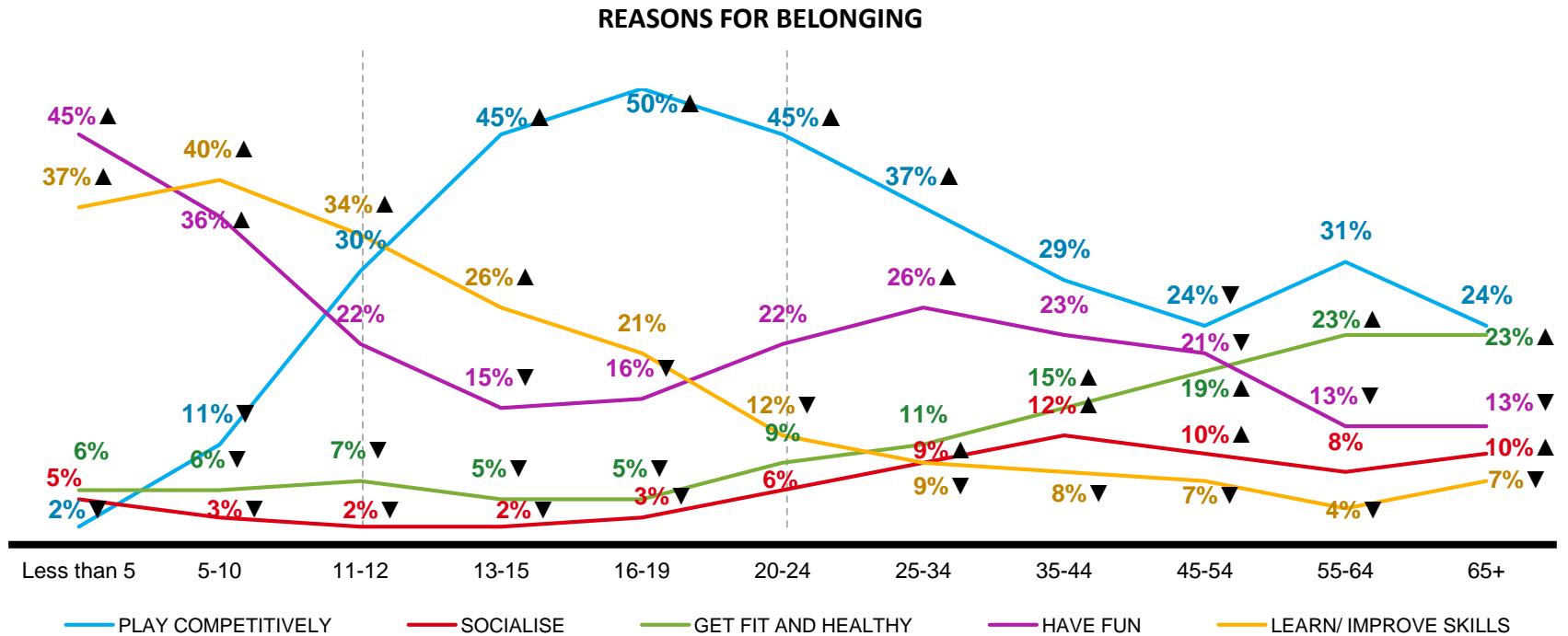
- ▶ Change their club for *better opportunities to fulfil potential* (17% cf. 9%), to *change grades/levels/play in a different team* (15% cf. 9%) or for *better quality of coaches or instructors* (9% cf. 5%)
- ▶ Belong to a club to *play competitively* (46% cf. 30%) or *learn/improve skills* (24% cf. 22%)
- ▶ Play or train four or more times a week (44% cf. 21%)
- ▶ Indicate their least satisfied aspect is *fair and provides equal opportunities for all players* (13% cf. 9%)
- ▶ Want investment to *player development programmes* (28% cf. 24%) if fees increased.



- ▶ Belong to a club to *play competitively* (33% cf. 30%), *get fit & healthy* (15%) or *socialise* (9% cf. 6%)
- ▶ Play or train once a week or less (28% cf. 22%).

THERE APPEARS TO BE DIFFERENT STAGES IN REASONS FOR BELONGING TO A CLUB

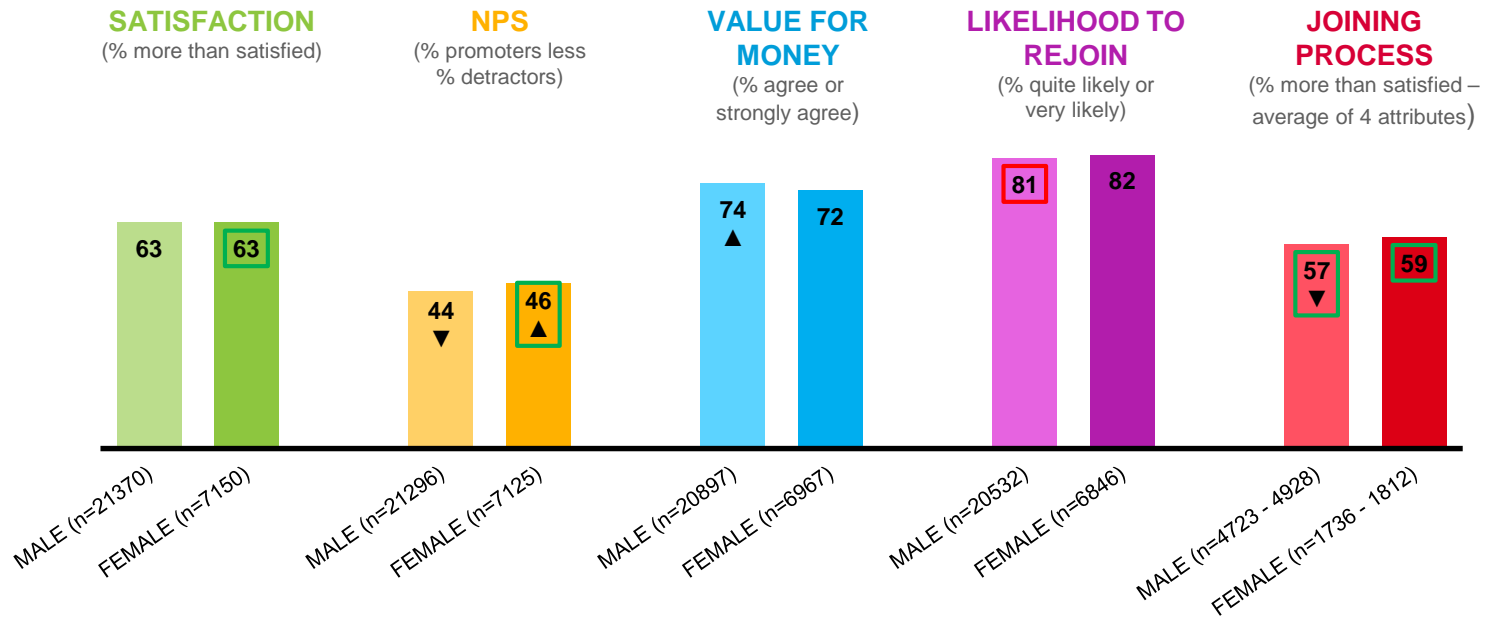
For those under the age of eleven, the main reasons for belonging are to *have fun* and *learn/improve skills* but as they approach secondary school, competition takes over as the predominant reason for belonging to a club, peaking between the ages of 16 and 19. From early adulthood (20-24 years), while competition remains the main reason for belonging, motivations are more evenly distributed as the proportion who belong to *get fit & healthy*, *socialise* and *have fun* increases.



Base: All respondents that are members (n=28249)
 Q4. What is the main reason you/your child belong/belongs to a <sport> club?
 Q22. In which of the following age groups do/does you/your child belong?

THERE IS LITTLE DIFFERENCE BETWEEN MALE & FEMALE RESPONDENTS

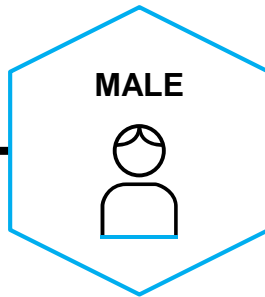
Female results are typically more positive, and higher or significantly higher than in 2016/17, with the exception of value for money.



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 (Average of four attributes)

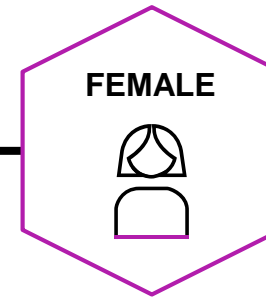
▲ ▼ Significantly higher/lower than Total 2017/18
 □ / □ Significantly higher/lower than All Sports 2016/17

KEY DIFFERENCES: GENDER



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

- ▶ Be a member for 3-5 years (31% cf. 28% females)
- ▶ Main reason for belonging is to *have fun* (25% cf. 21%)
- ▶ Play or train 2-3 times a week (59% cf. 50%)
- ▶ Least satisfied with;
 - ▶ Having well maintained playing/training venues/fields/courts (9% cf. 5%)
 - ▶ Having qualified/experienced officials available when I/they compete (13% cf. 11%).
- ▶ If fees increased, would want this reflected in investment to *playing/training venues/fields/courts* (13% cf. 10%)
- ▶ Be of Asian or Indian ethnicity (9% cf. 6%).



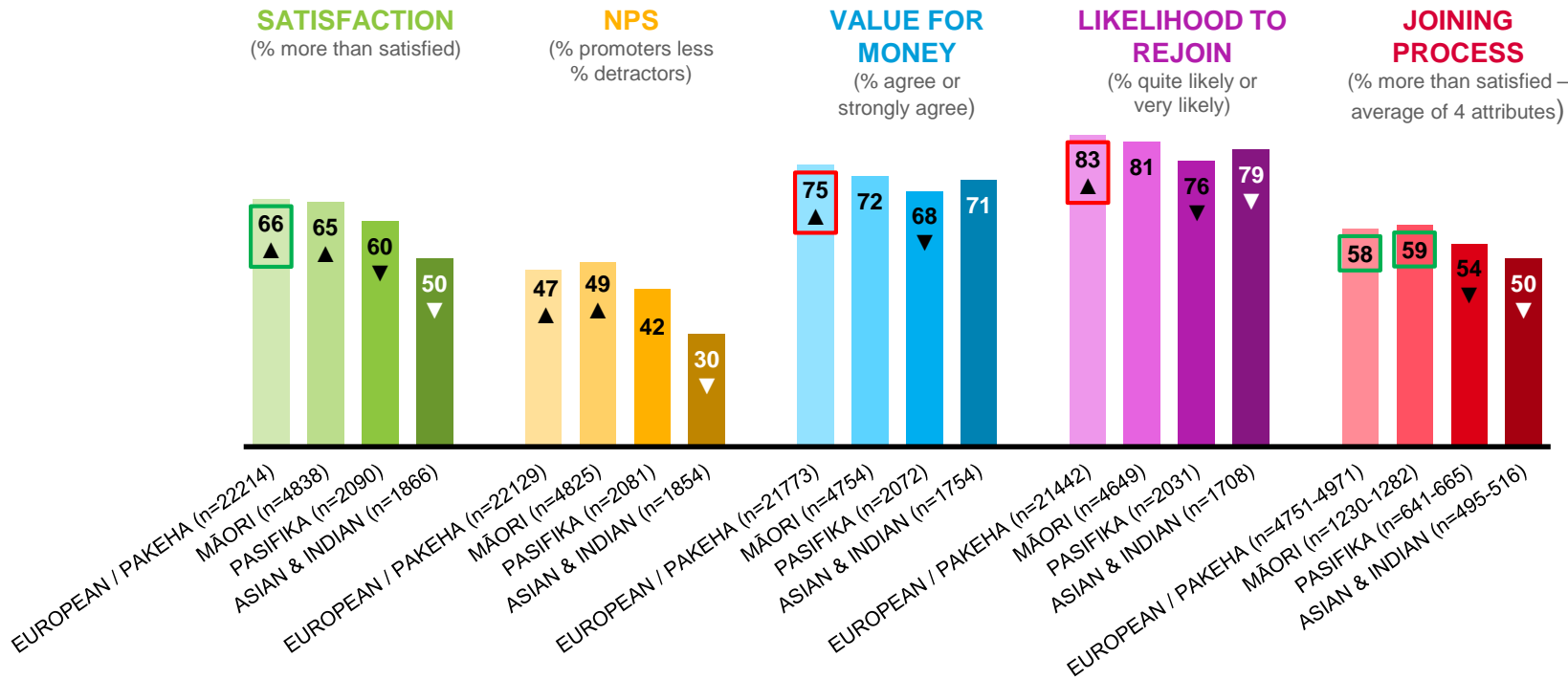
Female respondents are **significantly more likely than males** to:

- ▶ Have been a member of another club (49% cf. 45% males)
- ▶ Main reason for belonging is to *play competitively* (12% cf. 9% male)
- ▶ Play or train once a week or less (24% cf. 21%), or four or more times a week (24% cf. 19%)
- ▶ More than satisfied with key driver *the quality of the coaches or instructors* (67% cf. 64%)
- ▶ More likely to say *I don't want them to improve anything if it means my fees need to increase* (15% cf. 11%)
- ▶ If fees increased, would want this reflected in investment to the *number of coaches or instructors* (9% cf. 7%)
- ▶ Although the number of injuries are consistent, females are sig. more likely to indicate they made an ACC claim (68% cf. 60%)
- ▶ More satisfied with the support they received from their club when injured (68% cf. 64% - average of three attributes)
- ▶ Be of Māori ethnicity (28% cf. 22%).

THOSE OF ASIAN & INDIAN ETHNICITY ARE LESS POSITIVE THAN THOSE OF OTHER ETHNICITIES

Pasifika respondents are least likely to perceive value for money or rejoin their club next season.

Respondents of European / Pakeha ethnicity have significantly higher results across each of the key metrics with the exception of the joining process (although they are significantly more likely to be more than satisfied with the joining process compared to respondents across all sports in 2016/17).



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 (Average of four attributes)

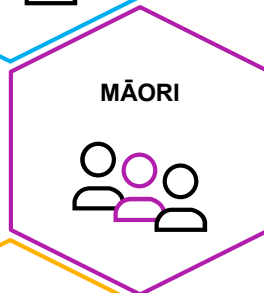
▲ ▼ Significantly higher/lower than Total 2017/18
 □ / □ Significantly higher/lower than All Sports 2016/17

KEY DIFFERENCES: ETHNICITY

Compared to the total for 2017/18, the following ethnicities are significantly more likely to:



- ▶ Belong to a club to *have fun* (27% cf. 24%)
- ▶ Be more than satisfied with the following key drivers:
 - ▶ Being friendly and welcoming (77% cf. 75%)
 - ▶ Quality of coaches or instructors (67% cf. 65%)
 - ▶ Having well maintained playing/training venues (64% cf. 62)
 - ▶ Providing me/them the information I/they need when I/they need it (65% cf. 63%)
 - ▶ Allowing me/them to fulfil my/their potential (64% cf. 61%)
 - ▶ Is fair and provides equal opportunities for all players (65% cf. 63%).



- ▶ To play or train four or more times a week (28% cf. 21%)
- ▶ Be more than satisfied with the following key drivers:
 - ▶ Quality of coaches or instructors (68% cf. 65%)
 - ▶ Allowing me/them to fulfil my/their potential (64% cf. 61%)
- ▶ Want investment to *facilities e.g. club rooms, changing rooms, toilets* (19% cf. 16%) if fees increased
- ▶ Be more likely to have represented the top team in age group or higher representative honours (55%)
- ▶ Hold multiple roles at the club such as player, coach, administrator, etc. (1.32 roles on average cf. 1.27)
- ▶ Be aged 5-18 years (55% cf. 50%)
- ▶ Female (39% cf. 33%).



- ▶ Be new members (less than a year) (30% cf. 21%)
- ▶ Belong to a club to *learn/improve skills* (31% cf. 22%) or *get fit & healthy* (13% cf. 10%)
- ▶ Play or train two or three times a week (61% cf. 56%) or four or more times a week (24% cf. 21%)
- ▶ Indicate their least satisfied aspect is *having clean and well maintained facilities* (14% cf. 11%)
- ▶ Want investment to *player development programmes* (29% cf. 24%) or *management of the club* (8% cf. 5%) if fees increased.



- ▶ Be members for 1-2 years (26% cf. 19%)
- ▶ Belong to a club to *learn/improve skills* (25% cf. 22%) or *get fit & healthy* (17% cf. 10%)
- ▶ Play or train once a week (23% cf. 18%)
- ▶ Indicate their least satisfied aspect is the *ease of accessing the clubs venues/fields/courts for training or casual playing* (8% cf. 5%)
- ▶ Want investment to *playing/training venues/fields/courts* (17% cf. 12%) if fees increased
- ▶ Be aged 20-34 years (29% cf. 16%)
- ▶ Male (75% cf. 66%).

Base: European/Pakeha (n=22888); Māori (n=5026); Pasifika (n=2186); Asian & Indian (n=961)

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?

| REGION | SATISFACTION (% more than satisfied) | NPS (% promoters less % detractors) | VALUE FOR MONEY (% agree or strongly agree) | LIKELIHOOD TO REJOIN (% quite likely or very likely) | JOINING PROCESS (% more than satisfied – average of 4 attributes) |
|----------------------|---|--|--|---|--|
| TOTAL | 63% | 44 | 81% | 73% | 58% |
| Northland | 72% | 57 | 86% | 81% | 58% |
| Auckland | 58% | 36 | 79% | 68% | 51% |
| Waikato | 67% | 48 | 80% | 79% | 66% |
| Bay of Plenty | 65% | 50 | 82% | 77% | 58% |
| Gisborne | 67% | 57 | 77% | 72% | 56% |
| Hawkes Bay | 70% | 54 | 85% | 81% | 66% |
| Taranaki | 66% | 46 | 84% | 79% | 58% |
| Manawatu | 67% | 55 | 83% | 78% | 71% |
| Whanganui | 57% | 49 | 85% | 70% | 65% |
| Wellington-Wairarapa | 66% | 48 | 82% | 76% | 62% |
| Tasman | 68% | 67 | 88% | 86% | 63% |
| Nelson | 53% | 36 | 85% | 70% | 43% |
| Marlborough | 59% | 47 | 87% | 75% | 64% |
| West Coast | 69% | 61 | 82% | 82% | 61% |
| Canterbury | 65% | 44 | 83% | 72% | 58% |
| Otago | 67% | 49 | 83% | 77% | 57% |
| Southland | 65% | 49 | 82% | 79% | 69% |

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)

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

Q6/Q7/Q9/Q11/Q20 (Average of four attributes)

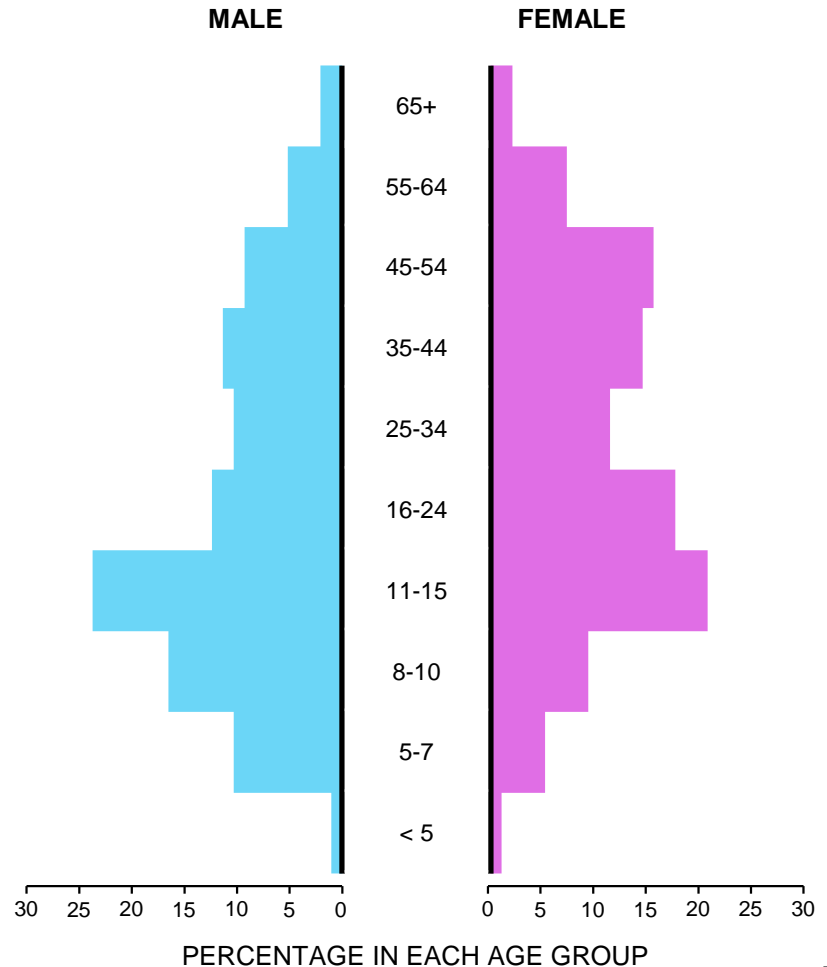
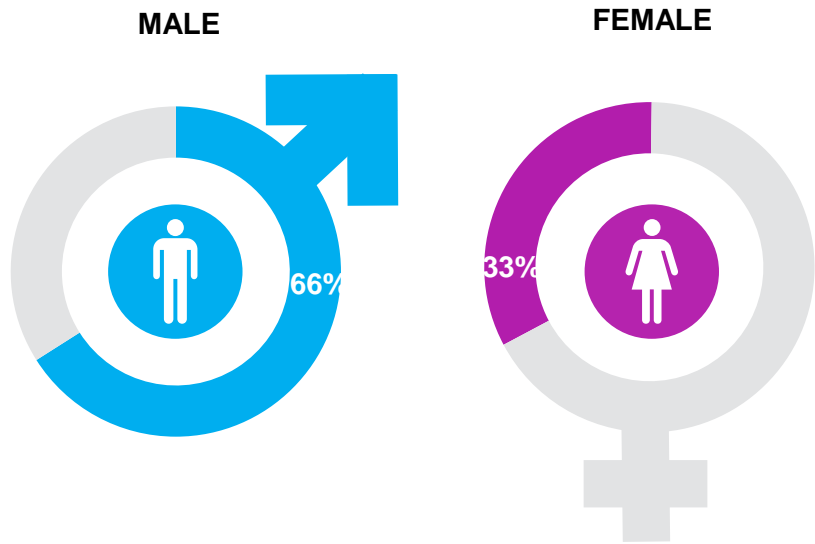
* Note, for a further breakdown of the regions please refer to the Sport NZ VOP Regional Report 2018.

■ / ■ Significantly higher/lower than Total 2017/18

SAMPLE PROFILE

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=29572) | PLAYER (n=15597) | PARENT (n=13975) | ALL SPORTS 2016/17 (n=25631) |
|----------------|-----------------|------------------|------------------|------------------------------|
| MALE | 66% | 61% | 73% | 64% |
| FEMALE | 33% | 38% | 26% | 36% |
| GENDER DIVERSE | <1% | <1% | <1% | <1% |

AGE, REGION, ETHNICITY

| AGE (Q22) | TOTAL (n=29572) |
|-------------------|--------------------|
| Less than 5 years | 1% |
| 5-7 years | 8% |
| 8-10 years | 13% |
| 11-12 years | 9% |
| 13 years | 5% |
| 14 years | 4% |
| 15 years | 4% |
| 16 years | 3% |
| 17 years | 2% |
| 18 years | 2% |
| 19 years | 2% |
| 20-24 years | 6% |
| 25-29 years | 5% |
| 30-34 years | 5% |
| 35-39 years | 5% |
| 40-44 years | 6% |
| 45-49 years | 6% |
| 50-54 years | 5% |
| 55-59 years | 4% |
| 60-64 years | 2% |
| 65-69 years | 1% |
| 70-74 years | 1% |
| 75+ years | <1% |

| REGION (Q23) | TOTAL (n=29572) |
|----------------------|--------------------|
| Northland | 3% |
| Auckland | 34% |
| Waikato | 6% |
| Bay of Plenty | 6% |
| Gisborne | 1% |
| Hawke's Bay | 3% |
| Taranaki | 3% |
| Manawatu | 4% |
| Whanganui | 1% |
| Wellington-Wairarapa | 12% |
| Tasman | 1% |
| Nelson | 1% |
| Marlborough | 1% |
| West Coast | <1% |
| Canterbury | 16% |
| Otago | 5% |
| Southland | 2% |

| ETHNICITY (Q34) | TOTAL (n=29572) |
|-------------------------|--------------------|
| NET European/ Pakeha | 69% |
| Māori | 24% |
| NET Pasifika | 10% |
| Samoan | 5% |
| Tongan | 2% |
| Cook Island | 3% |
| Fijian | 1% |
| Niuean | 1% |
| NET Asian + Indian | 8% |
| Chinese | 4% |

ROLE AT CLUB, MEMBERSHIP TENURE, COMPETITIVE LEVEL, PLAYING/TRAINING FREQUENCY

| ROLE (Q27) | TOTAL (n=29290) |
|---|--------------------|
| Player | 92% |
| Coach | 10% |
| Manager | 5% |
| Committee Member | 7% |
| Official/referee/judge | 4% |
| Club President or another office holder | 4% |

| MEMBERSHIP TENURE (Q3) | TOTAL (n=28249) |
|------------------------|--------------------|
| Less than 1 year | 21% |
| 1-2 years | 19% |
| 3-5 years | 30% |
| 6-10 years | 15% |
| More than 10 years | 15% |

| COMPETITIVE LEVEL (Q28) | TOTAL (n=28248) |
|--|--------------------|
| Played for the top team at my club | 30% |
| Been selected to represent my club at a regional event/competition | 24% |
| Been selected to represent my region at a national event/competition | 20% |
| Been selected to represent New Zealand at an international event/competition | 5% |
| None of these | 53% |

| FREQUENCY OF PLAYING/TRAINING (Q5) | TOTAL (n=28784) |
|------------------------------------|--------------------|
| Once a week/month | 18% |
| Two or three times a week/month | 56% |
| Four or five times a week/month | 15% |
| 6 or more times a week/month | 5% |
| Other | 2% |

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.

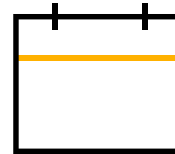
APPROACH



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.

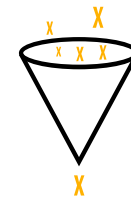
FIELDWORK



The survey was open between 12-31 July 2017 (Winter 2017) and 7-28 March 2018 (Summer 2018).

Reminders were sent during fieldwork from 24-26 July 2017, and 16-18 March 2018, followed by a second reminder from 24-28 July 2017 and 21-22 March 2018.

RESULT



A total of 29,572 respondents nationwide completed the survey, consisting of 15,597 players and 13,975 parents of children under the age of 16.

This gives a maximum margin of error for the total for all sports in 2017/18 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.

APPENDIX

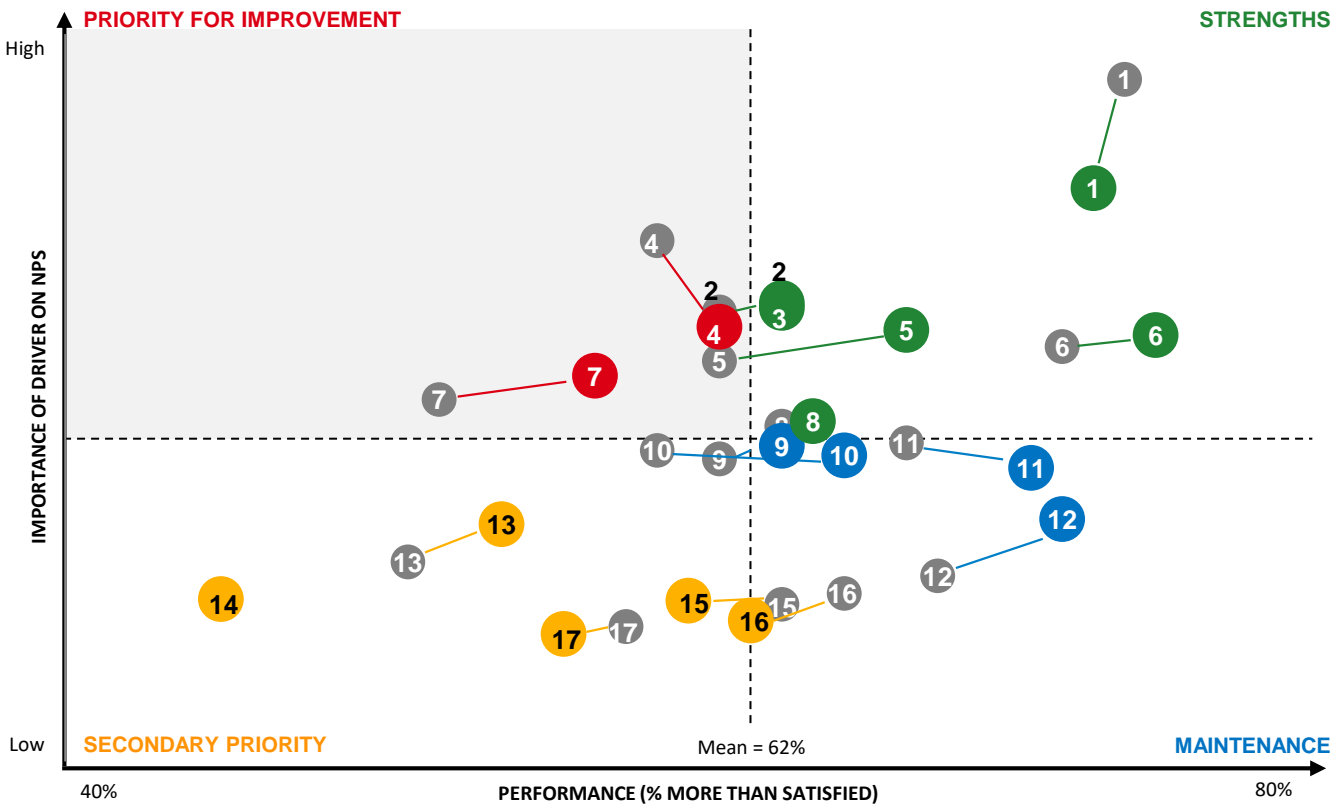
YEAR ON YEAR CHANGES OF DRIVERS OF RECOMMENDATION (NPS)

Among 2017/18 participating NSOs, the top three drivers of recommendation for respondents are:

1. Value for money
2. Fair and provides equal opportunities
3. Being professional and well managed

Drivers that were performing relatively lower among NSOs in 2016/17 and have seen improvement include *fair and equal opportunities, being professional and well managed, fostering a sense of pride, encouraging good sportsmanship and fair play and providing a safe environment for adults and children.*

Drivers that have a lower impact on NPS, include *ease of accessing venues, having well maintained playing/training venues and having clean and well maintained facilities.*



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

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?

* 2017/18 results include Q10(R6) *Having qualified/experienced officials available when I/they compete.* In 2016/17, attributes that excluded greater than 30% of respondents were not included.