

Voice of Participant Report 2016-2023

Looking across all participating sports from 2016 - April 2023

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Introduction

What is the Voice of Participant survey?

Voice of Participant (VOP), also known as the Club Experience Survey, was initiated by Sport NZ in 2016 as a tool for National Sports Organisations (NSOs) to better understand their club members' experiences. The research examines behaviours, attitudes, and needs relating to specific touchpoints across all engagements within a club context. This approach helps NSOs understand how different interactions are perceived and what needs to be done correctly to retain and increase membership.

Between 2016 and April 2023, 23 NSOs participated in the VOP survey. Seventeen sports have participated multiple times, while others have chosen to participate once.

What is this report?

This report looks to answer two questions:

1. How has the experience changed for the 17 sports that have participated in VOP more than once between 2016 and 2023?
2. What do we know about the experience being delivered within grassroots sports when we look at results across the 23 sports that have taken part in VOP between 2016 and 2023?

Participating sporting bodies (up to April 2023)

Participated in VOP multiple times

- Athletics NZ
- Badminton NZ
- Basketball NZ
- Hockey NZ
- Netball NZ
- NZ Cricket
- NZ Football
- NZ Football (Futsal)
- NZ Golf
- NZ Rugby League
- NZ Rugby
- Softball NZ
- Surf Life Saving NZ
- Tennis NZ
- Touch NZ
- Waka Ama NZ
- Yachting NZ

Participated in VOP once

- Bowls NZ
- Gliding NZ
- International Taekwan-do
- NZ Water Polo
- Surfing NZ
- Swimming NZ

Key Observations

Key observations

1. Sports are offering improved experiences to their members.

- Almost all sports that have participated in VOP more than once have seen an increase in overall satisfaction.

2. The experience has improved across a broad range of areas.

- The biggest improvements were seen in having qualified officials available, engaging with the local community and being responsive to needs.

3. Nine in ten club participants (92%) are satisfied to some degree with their overall experience, and two-thirds are either very or extremely satisfied (66%).

- One in ten are dissatisfied or extremely dissatisfied with their experience (8%).

4. There is large variation in satisfaction across sports.

- Satisfaction varies from 52% to 79% (very or extremely satisfied).

5. Satisfaction varies across different demographic groups.

- Groups with higher satisfaction include younger participants (5-12 year olds), males, Europeans and non-disabled participants.

6. There are some clear patterns across sports regarding satisfaction with specific aspects of the experience.

- Being friendly and welcoming and providing a safe environment rate particularly highly. Having qualified officials available tends to receive a low rating.

7. Player development programmes are a key focus for improvement for all ages, but particularly for young people.

8. Motivations change across different age groups, with skill development and fun being the key reasons to participate for the youngest groups.

9. A quarter of participants experience inappropriate behaviour at least occasionally when playing their sport.

10. There is strong agreement with gender equality statements, although males have stronger agreement than females.

SECTION 1: Change over time of overall satisfaction

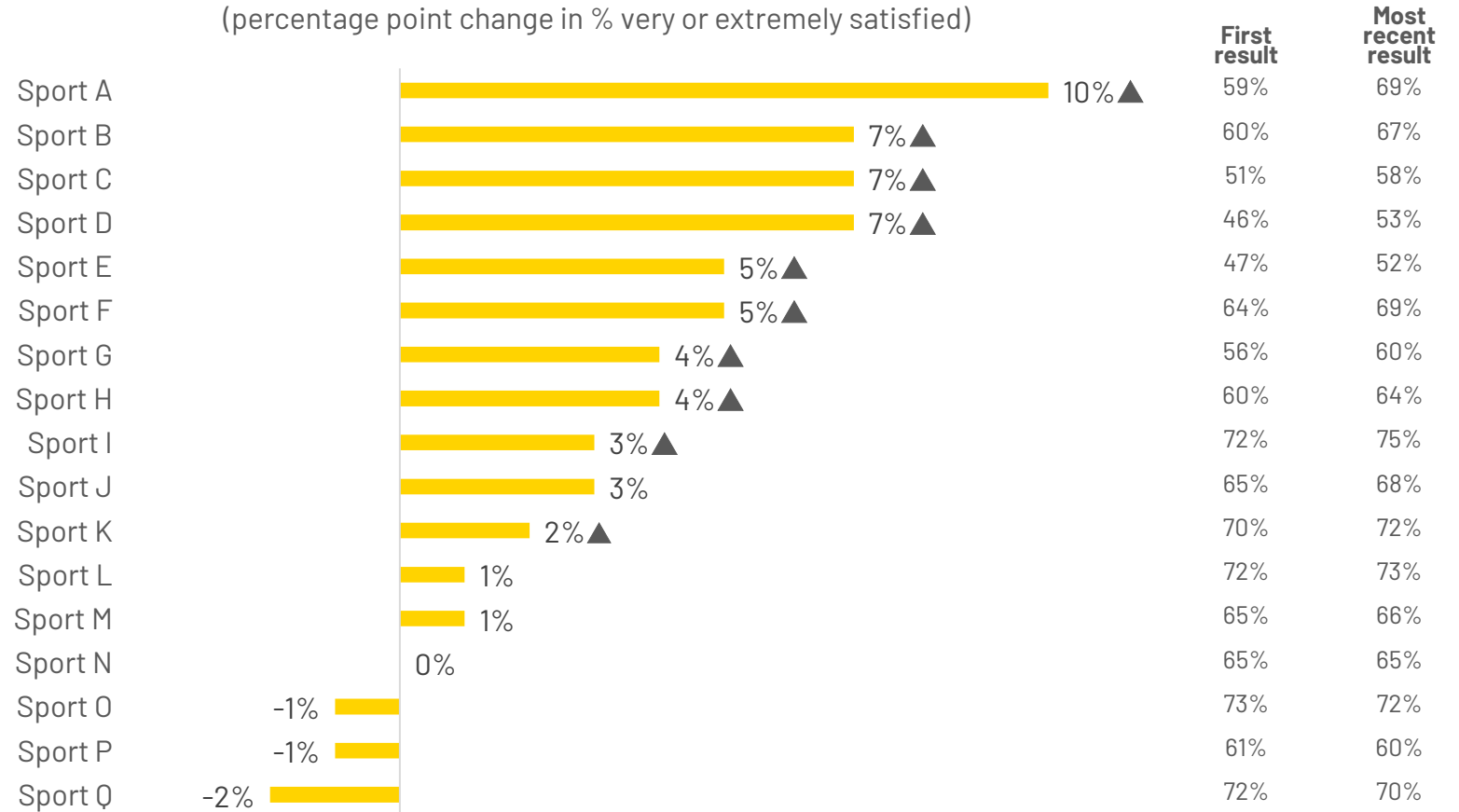
(For sports that have taken part in VOP more than once)

Three quarters of participating sports have seen an increase in overall satisfaction with the experience

- Thirteen of the 17 sports that have participated in VOP more than once have seen improvements in overall satisfaction (from the first to most recent survey), with ten showing statistically significant improvements.
- On average, the difference in overall satisfaction between the first and most recent results is +3.2% (62.2% in the first wave, increasing to 65.5%). Ten sports saw increases of +3% or more, and of those, four climbed +7% or more.
- Two of the three sports that saw small declines in satisfaction still have very high levels of satisfaction (at least 70% very or extremely satisfied).
- Understanding the participant experience within a sport has a range of benefits, which can help lead to an improvement in the overall experience.

Overall satisfaction – difference between first and most recent VOP result

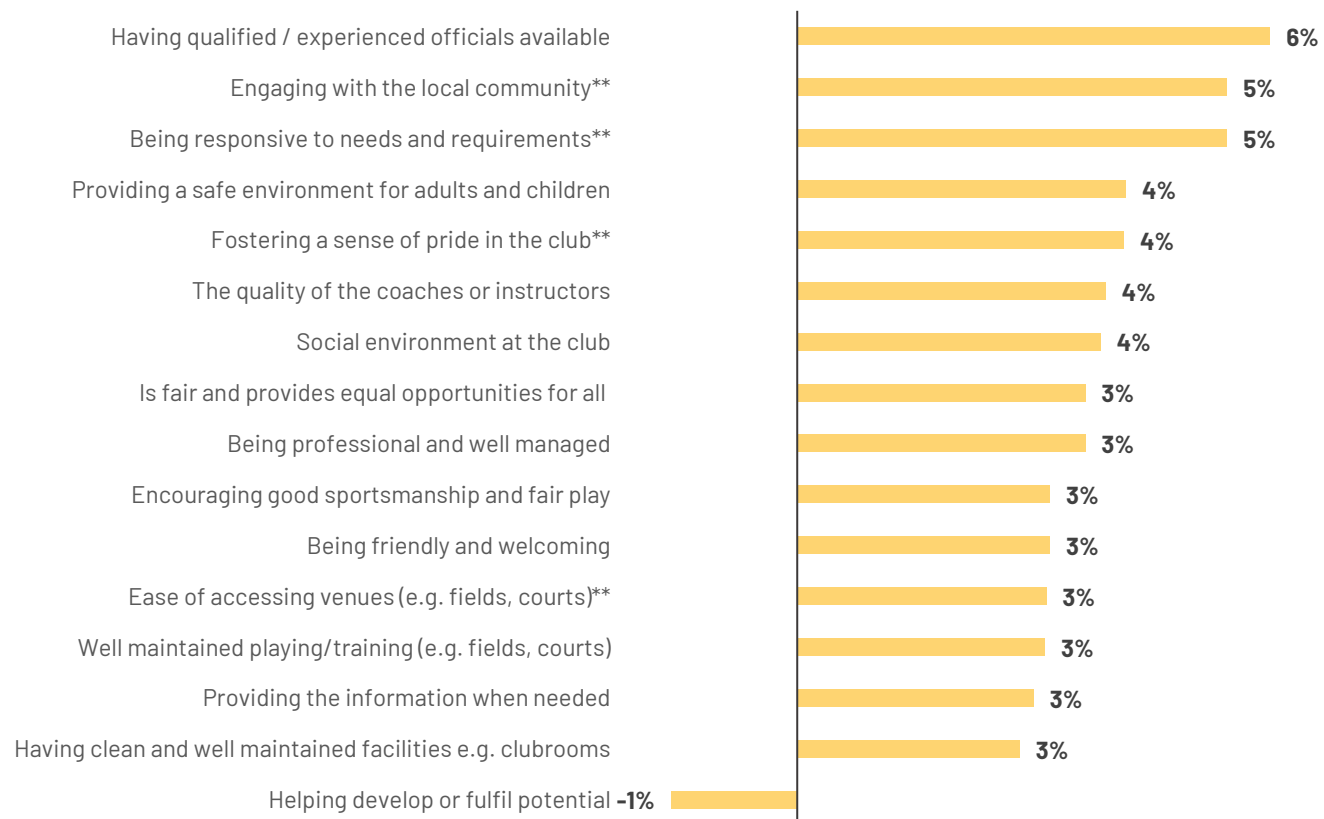
(percentage point change in % very or extremely satisfied)



Different aspects of the experience improved to varying degrees across the 17 sports

- For each aspect of the experience measured, the majority of sports saw an increase in satisfaction. The average increase ranges from -1% to +6%.
- There were 14 sports that saw an increase of 3% or more in **having qualified/experienced officials available**. Three of these sports had an increase of 10% or more.
- For the following aspects of the experience, there were at least nine sports that saw an increase of +3% or more for the following:
 - Quality of coaches
 - Clean, well maintained facilities
 - Well maintained playing/training venues
 - Social environment of club
 - Safe environment for adults and children
 - Is fair and provides equal opportunities for all players
 - Being professional and well managed
 - Encouraging good sportsmanship

Average change in satisfaction with aspects of the club experience*
(from first to most recent results)



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

* Not all aspects of the experience are asked for every sport
** Only asked of 5-7 of the 17 sports (the rest were asked for all 17).

Large increases in overall satisfaction have been driven by improvements across multiple areas

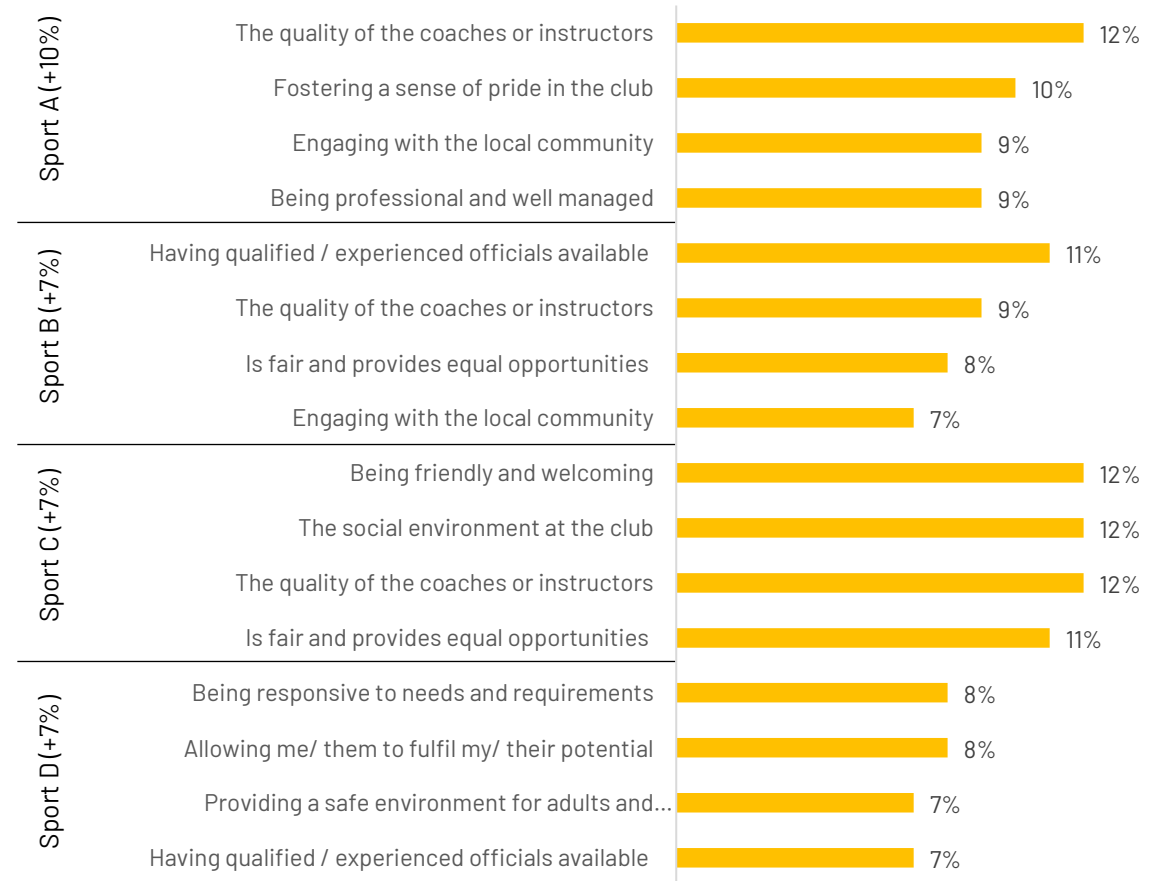
While there is variation, looking across the four sports with the largest increases in overall satisfaction, the following aspect was in the top four most improved areas in three of the four sports:

- **Quality of coaches**

Furthermore, these aspects were in the top four most improved areas for two of the four sports:

- **Having experienced/qualified officials**
- **Is fair and provides equal opportunities**
- **Engaging with the local community**

Top 4 increases in driver satisfaction for sports with large increases in overall satisfaction



Base: All respondents (Excluding Don't know/not applicable)
 Q6. To what extent are you satisfied or dissatisfied with the/your child's overall experience of playing at your/their club?
 Q10a/b. How would you/ your child rate your/ their overall satisfaction with your/ their <sport> club on each of the following...

SECTION 2: VOP results across all 23 sports

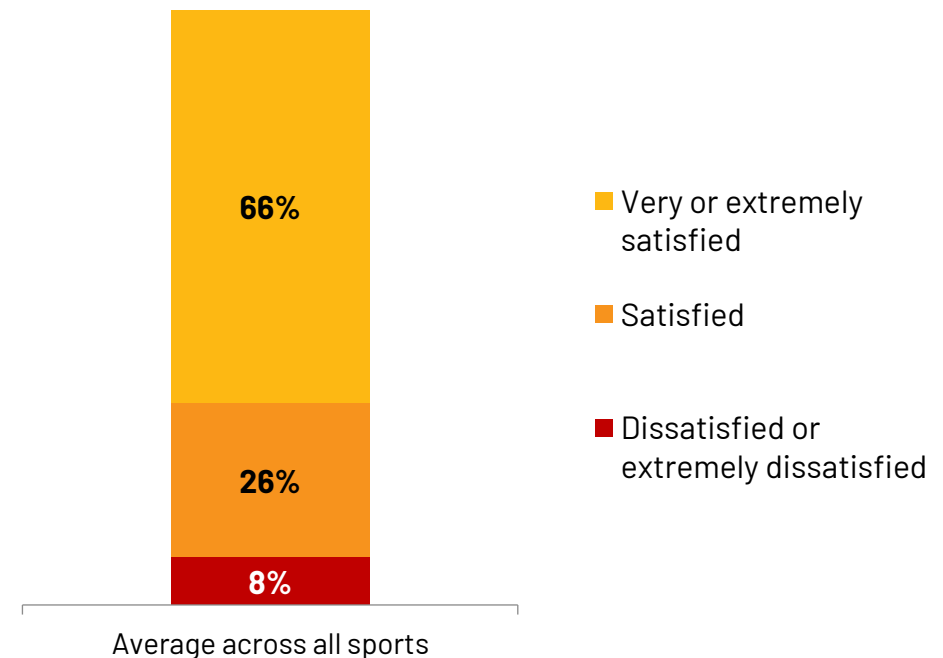
This section looks at the most recent results for each sport that took part in the first seven years of VOP

Satisfaction of club participants

On average, two thirds are very or extremely satisfied, with only 8% dissatisfied

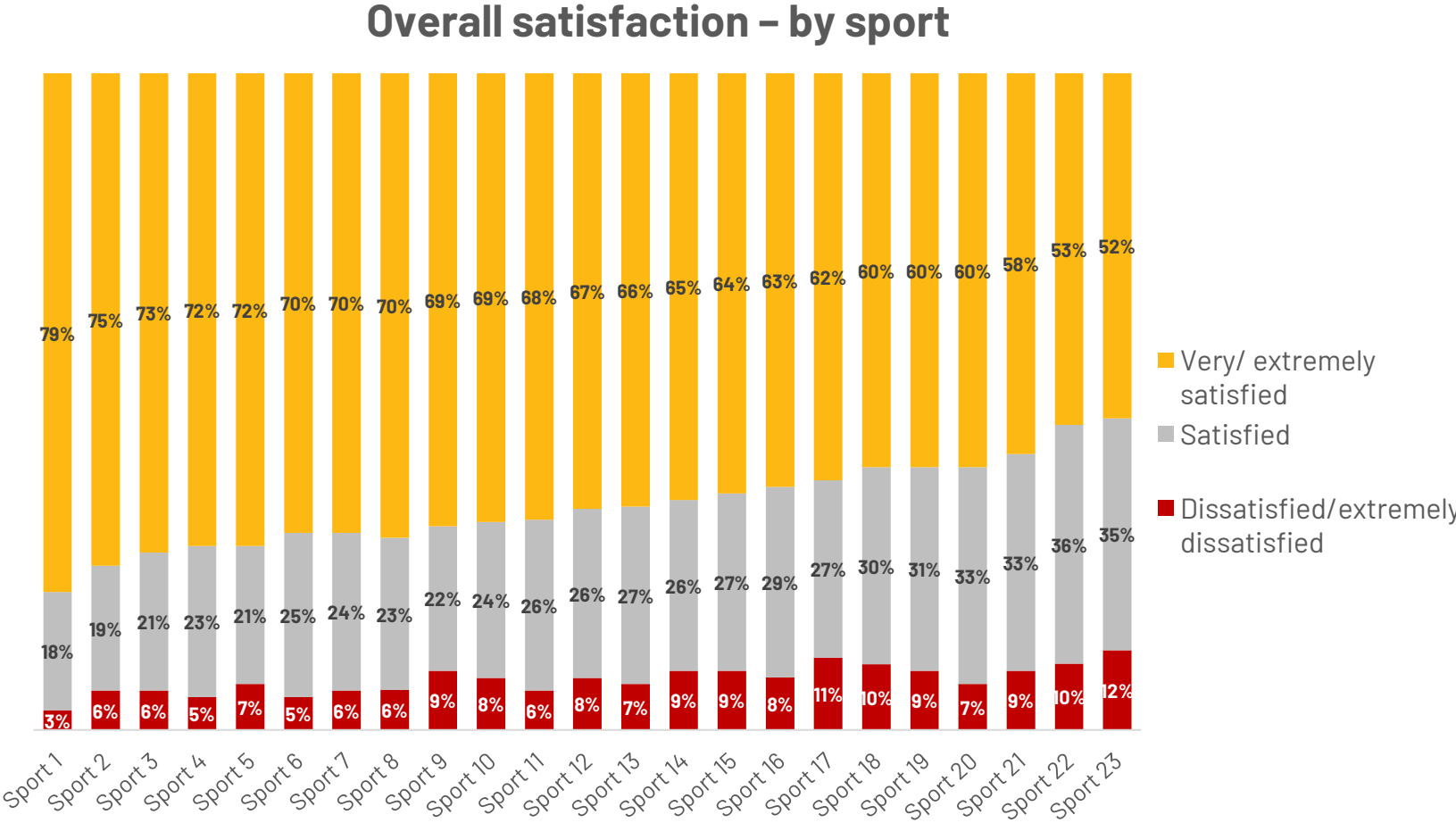
- On average, nine in ten are satisfied to some degree (92%), while only one in ten is dissatisfied (8%).
- A quarter of club members (26%) are **'satisfied'** with their experience (the mid-point of the scale). While these members are still 'satisfied', they have chosen not to select 'very' or 'extremely' satisfied, so there is room for improvement.
- Satisfaction levels vary by sport (see next page).

Average overall satisfaction – across all 23 sports



Overall satisfaction varies widely across the 23 sports

- The proportion very or extremely satisfied ranges from 52% to 79%.
- Dissatisfaction varies from 3% to 12%, while the proportion who are 'satisfied' (mid-point of the scale) varies from 18% to 35%.



Base: All respondents (Excluding Don't know/not applicable)
 Q6. To what extent are you satisfied or dissatisfied with the/your child's overall experience of playing at your/their club?



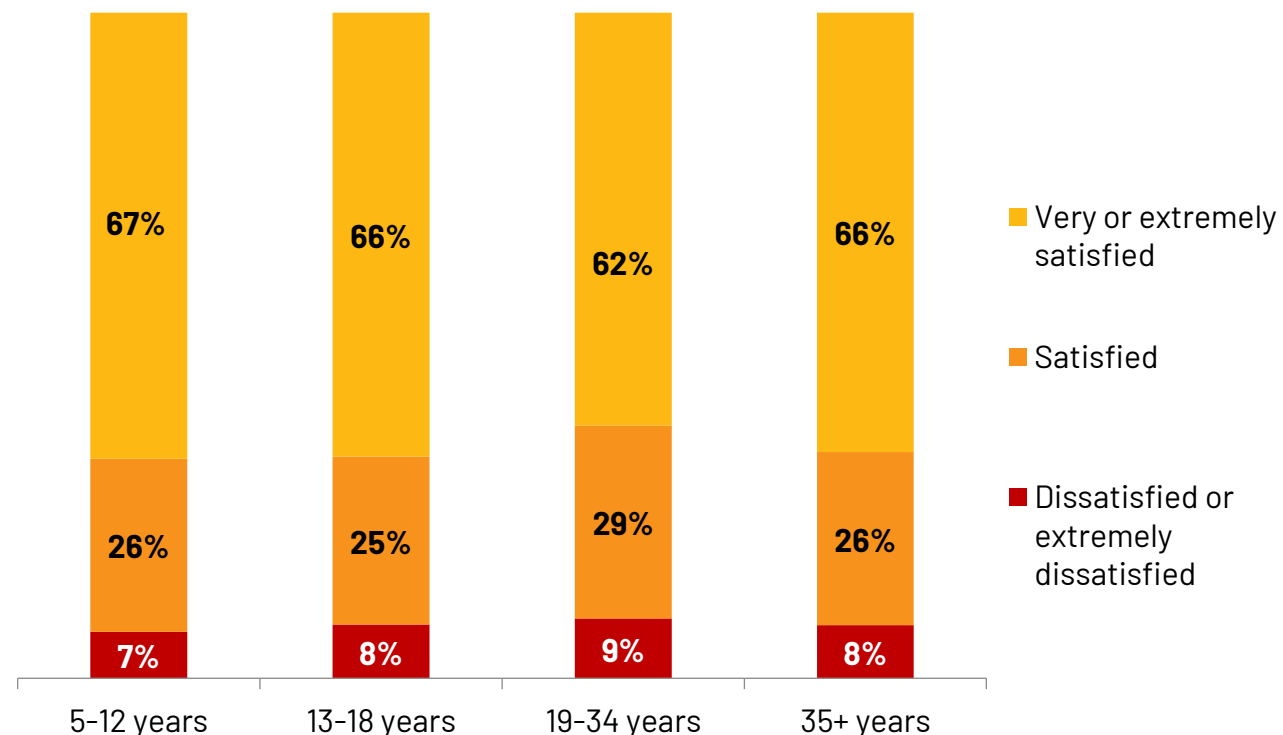
SPORT
NEW ZEALAND
IHI AOTEAROA

Differing satisfaction by age, gender, ethnicity and disability

Young adults (19-34) are the least satisfied age group, while 5-12 year olds are the most positive

- Across the 23 sports:
 - 5-12 year olds have the highest average satisfaction levels (67% very/extremely satisfied) and are the most satisfied age group for **11 sports**
 - 19-34 year olds have the lowest average satisfaction levels (62%) and are the age group with lowest satisfaction for **11 sports**.
- There is not much variation in terms of average dissatisfaction levels by age (7% to 9%).
- A key reason 19-34 year olds belong to their club is to 'play competitively'. This group may have higher expectations than other age groups in terms of their club experience, and therefore greater frustration when these are not met.

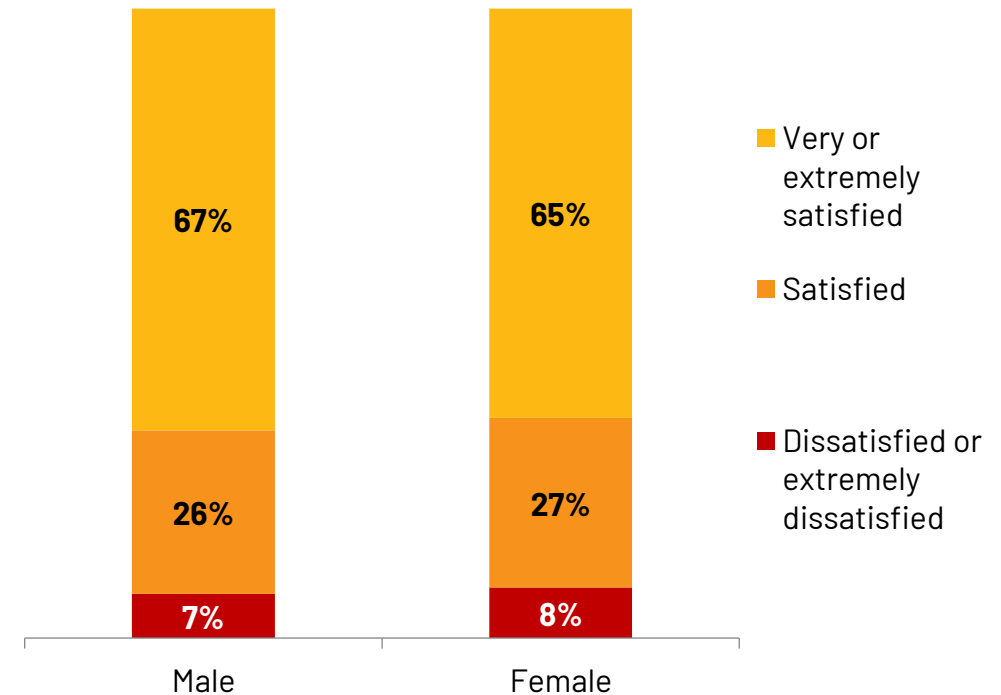
Average overall satisfaction – by age group



Male participants report higher satisfaction than female participants

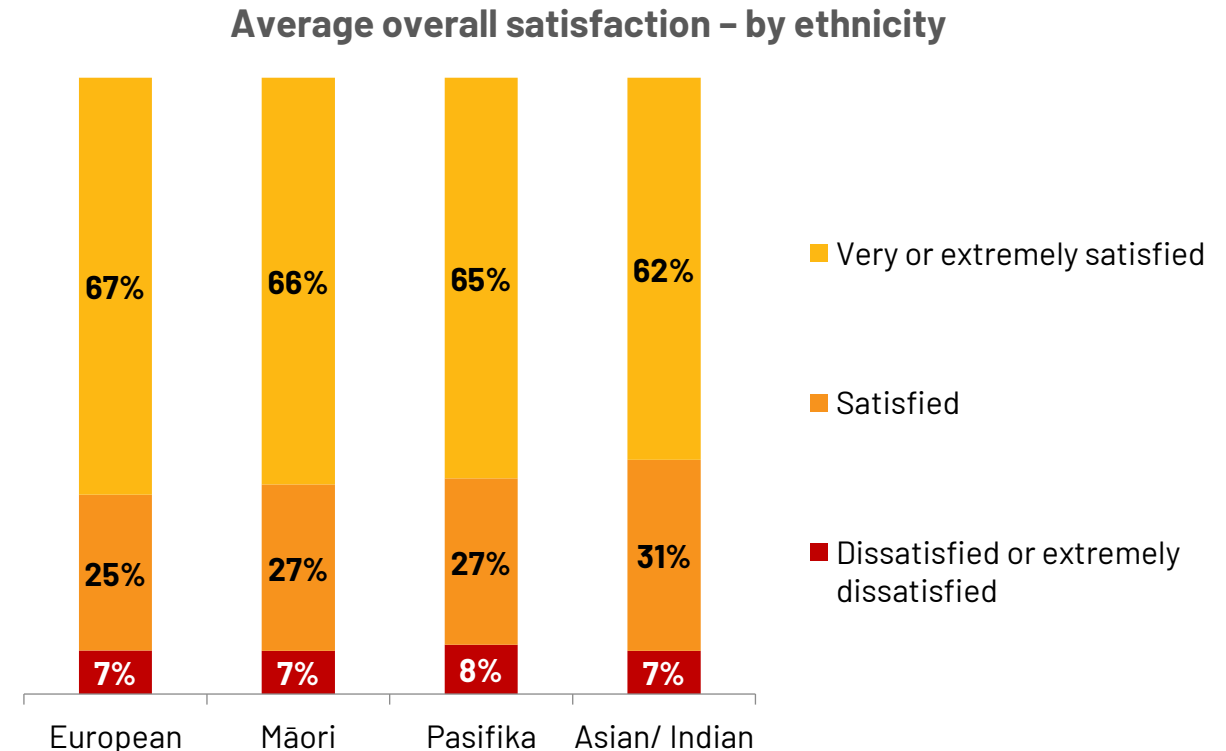
- Looking at the **average** overall satisfaction for males and females across the 23 sports, males report 67% very or extremely satisfied, with females reporting 65%. Overall, there are 13 sports where more males than females are very or extremely satisfied, and nine sports where females are more satisfied than males. In just one sport there is no difference.
- Of the 23 sports:
 - There are differences in satisfaction of 3% or more in 13 sports, and in eight of these males are more satisfied than females.
 - However, the difference is 2% or less for 10 sports.
- It appears there is an equity issue in a number of sports, which suggests further work needs to be done to understand and improve the experience of female participants.

Average overall satisfaction – by gender



Those of Asian/Indian ethnicity are most likely to be the least satisfied group of participants

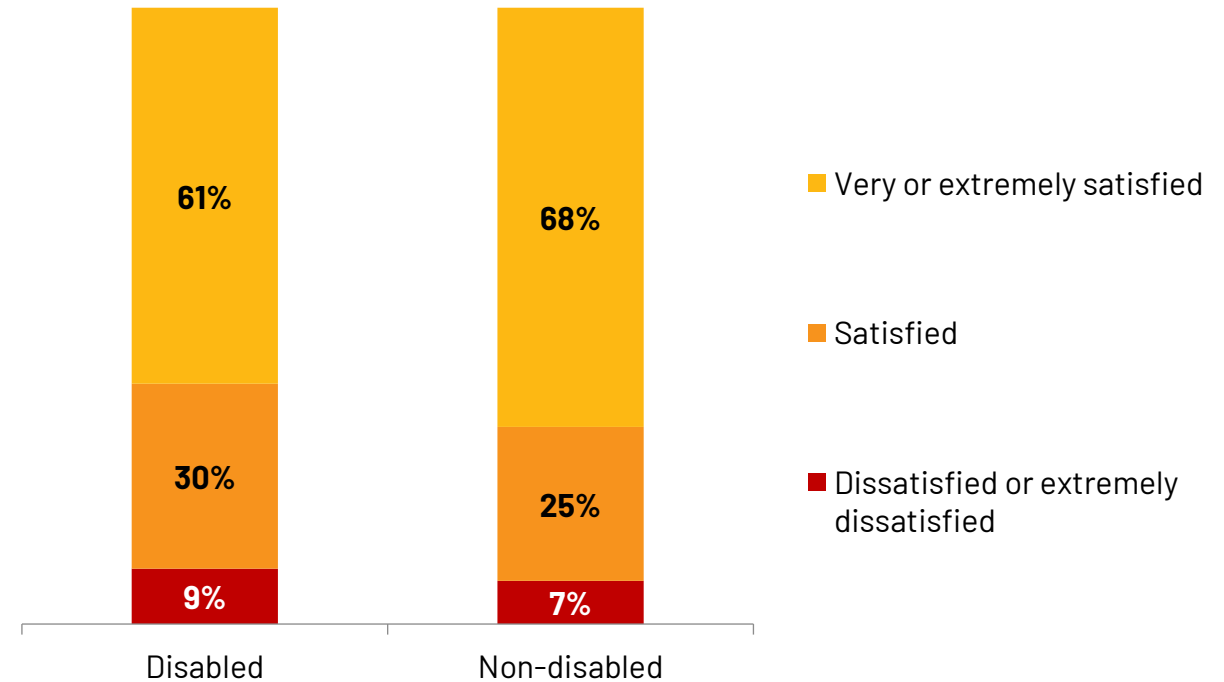
- Average overall satisfaction is relatively similar for European, Māori and Pasifika.
- Average satisfaction for Asian participants is lower than for other ethnicities.
- Asian participants report a rating of greater than 70% very or extremely satisfied in just 13% of sports. The equivalent result for European participants was 38% of sports.
- At the other end of the scale, one in four (25%) sports received a rating of lower than 60% from Asian/Indian participants. Just 9% of sports received a rating this low from their European participants.
- However, average dissatisfaction levels are relatively low for Asian/Indian; Asian/Indian club members are more likely to select 'satisfied' (the mid-point of the scale) than other ethnicities. Average levels of dissatisfaction are the same for all four ethnicity groups.



Disabled participants are less satisfied than non-disabled participants

- Six in ten disabled participants are very or extremely satisfied with their overall experience (61%), compared to nearly seven in ten for non-disabled participants (68%). Disabled participants are more likely than non-disabled participants to select they are 'satisfied' (30% vs. 25%).
- Within the 11 sports that included disability questions in their VOP survey, disabled participants have lower satisfaction levels than non-disabled participants in nine sports.
- For seven of these sports, the proportion of disabled participants that were very or extremely satisfied is between six and 18 percentage points lower than non-disabled participants.

Average overall satisfaction – by disability*



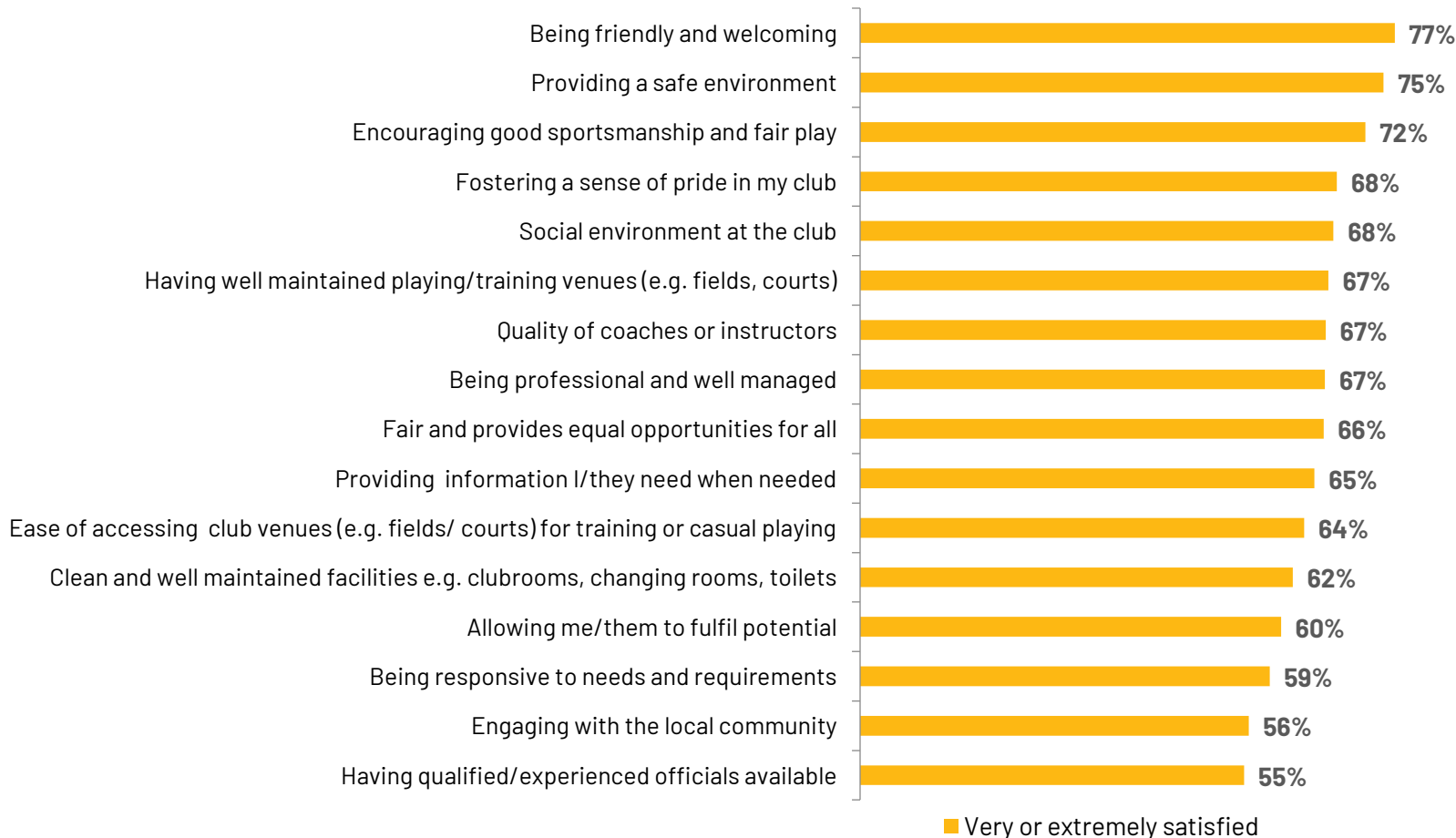
NOTE: Results based on 11 sports that included disability questions

Satisfaction with various aspects of the experience

The aspects of the club experience that members are most and least satisfied with

Most satisfied with friendliness, safety of the environment and encouragement around fair play

Satisfaction with various aspects of club experience



The following three attributes receive very positive ratings across almost all sports:

- **'Being friendly and welcoming'** is the aspect with the highest satisfaction in 14 of the 23 sports and is in the top three for 22 sports.
- Three quarters also rate clubs very highly on **'providing a safe environment'**; this is in the top three for 21 of 23 sports.
- **'Encouraging good sportsmanship'** is in the top three for 14 of 23 sports.
- On the other hand, **'having qualified/experienced officials available'** was the lowest-rated driver for 12 of the 22 sports that asked about it.

Desired improvements

This is what club participants would most like to improve the experience

Player development programmes are a key area for improvement across all age groups, but particularly for young people

Top 3 aspects club members would improve – by age group

At an overall level, 'player development programmes' is the area most frequently identified as the focus area for improvement. Player development programmes are particularly a key focus area for improvement for young people.

For adult participants, player development programmes, playing venues, and facilities are all features that many would like to see improved (all around 13-17%).

Quality of coaching is more of a focus for improvement for 5-12 year olds (12%).

| | 5-12 years | 13-18 years | 19-34 years | 35+ years |
|---|--|--|--|--|
| 1 | Player development programmes (29%) | Player development programmes (27%) | Player development programmes (17%) | Facilities e.g. clubrooms, toilets (17%) |
| 2 | Quality of coaching (12%) | Facilities e.g. clubrooms, toilets (12%) | Facilities e.g. clubrooms, toilets (13%) | Player development programmes (16%) |
| 3 | Facilities e.g. clubrooms, toilets (11%) | Playing venues (11%) | Playing venues (13%) | Playing venues (13%) |

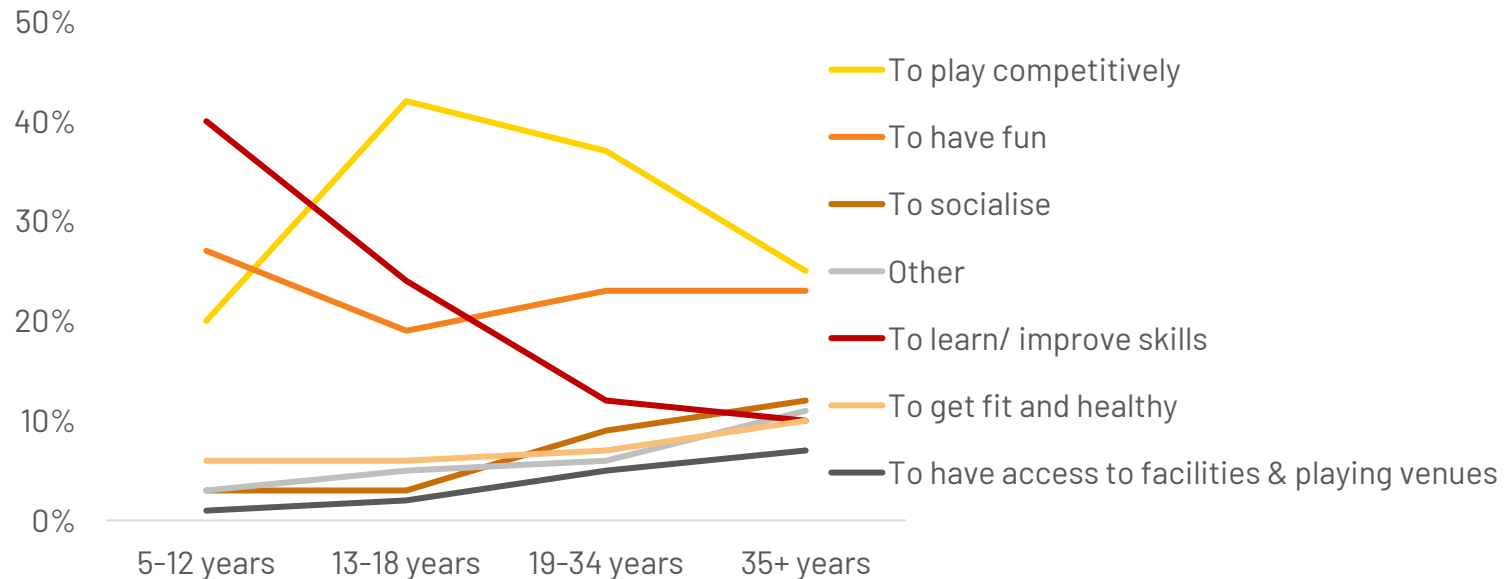
Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my feed need to increase)

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?

Reasons for members belonging to their club

From age 13-18 years onwards, 'to play competitively' is the most common reason for belonging

Main reason for belonging to their club – by age group



- For 5-12 year olds, belonging to learn/improve skills is the primary reason for belonging, followed by fun and competition.
- From age 13-18 years onwards, belonging to play competitively becomes the primary reason, although this drops slightly as members get older. For 13-18 year olds, this is the main reason for belonging in all but three sports, and for 19-34 year olds it is the main reason in all but five sports.
- For adults 35 years and over playing competitively is the main reason for belonging in 9 sports, the same number that have 'fun' as the main reason for belonging.
- Belonging to have fun drops at 13-18 years but then recovers slightly at ages 19-34 and 35+ years.

Inappropriate behaviour

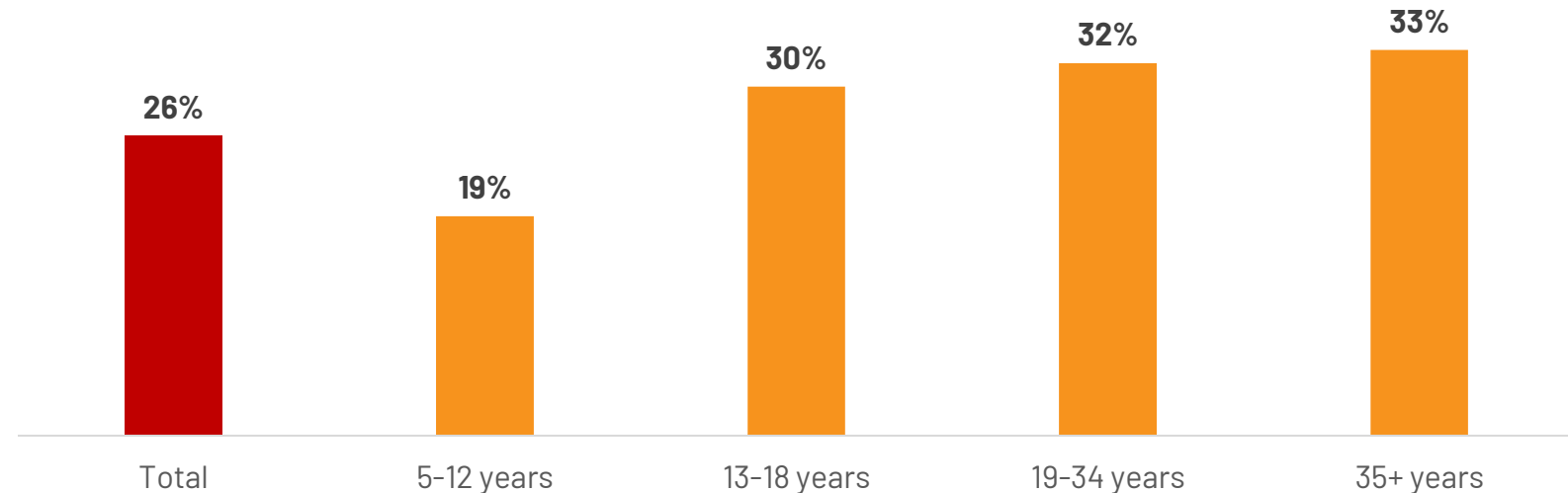
A quarter of participants experience 'inappropriate behaviour' while participating occasionally or more often

Inappropriate behaviour may include, but is not limited to; shouting, poor sportsmanship, bad language or gestures

Proportion experiencing 'inappropriate behaviour' occasionally or more often

(% every time, almost every time or occasionally)

There is a wide variation by sport (ranging from 8% to 46%). The 5-12 year old respondents are less likely to report inappropriate behaviour than other age groups.



NOTE: For the majority of 5-12 year olds, the survey is completed by parents or guardians on the young person's behalf. Around half of 13-18 year olds are completed by the parent or guardian.

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

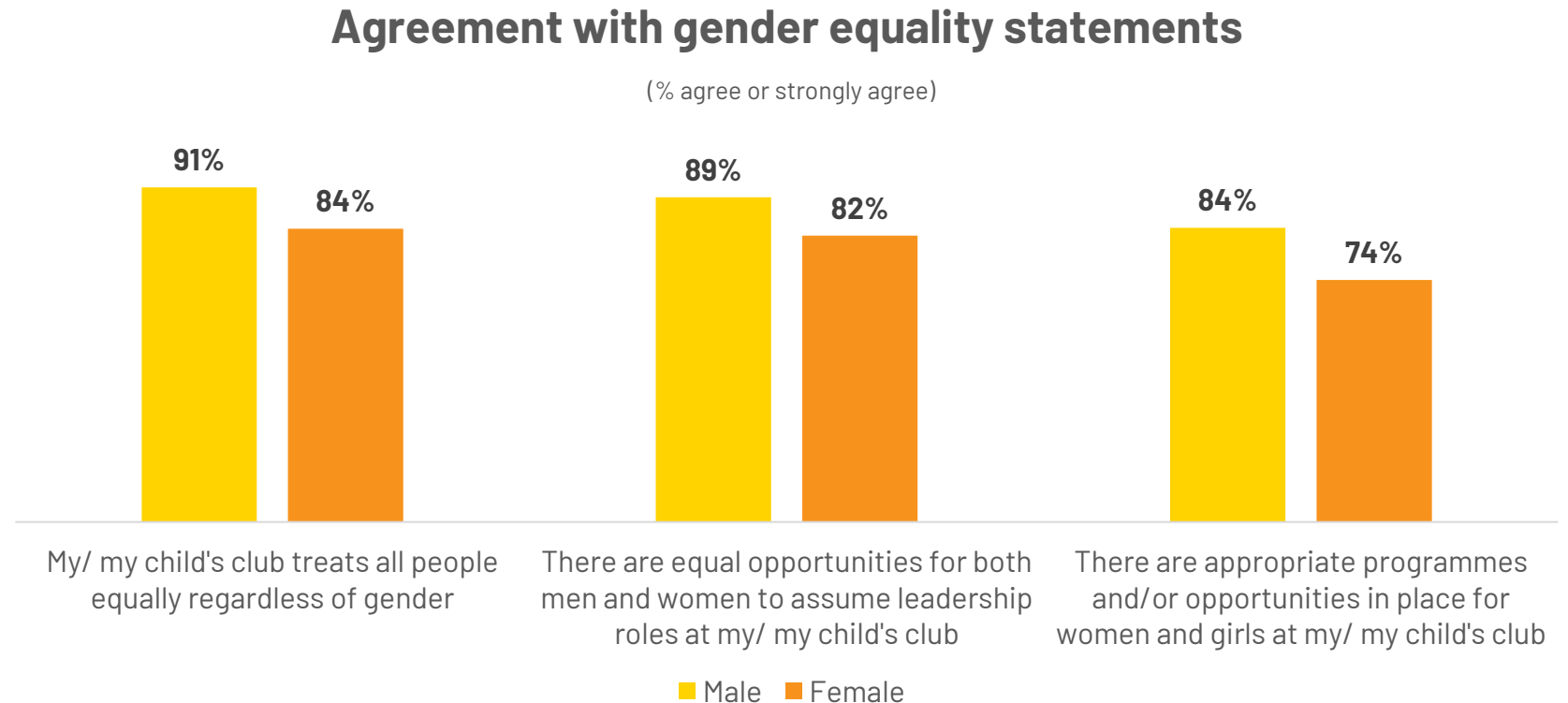
Q51. In the last 12 months, how frequently have you/have you or your child witnessed or experienced inappropriate behaviour by a spectator, coach or official while you/your child participated?

Inappropriate behaviour may include, but is not limited to, shouting, poor sportsmanship, bad language or gestures.

Gender equality

Male participants are more likely than females to agree with all three gender equality statements

The statement with lowest levels of agreement, and the largest difference between male and female participants, is *'there are appropriate programmes and/or opportunities in place for women and girls'* (84% male vs. 74% female).



Appendix

VOP: Other details

The original **objectives** of VOP were to:

- Empower the sport system to respond to the wants and needs of participants.
- Embed processes that continually put the participant at the centre of the sport system and 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.

Other details

- The survey took place in two waves per year; one in summer and one in winter. The sports that take part vary each year.
- Each NSO receives a report that includes results to all questions, including previous years' results (where applicable) and a comparison to the average for other sports that have taken part in VOP recently.
- The programme was jointly funded by Sport NZ and participating NSOs.
- Up to April 2023, there have been around 250,000 responses in total to VOP surveys.
- Between 2016 and April 2023, VOP was run by independent research agency, NielsenIQ.

About this report

How was it analysed?

1. For the 17 sports that have participated in VOP more than once: The analysis compares the results from their first and most recent participation in the survey (up to April 2023).
2. For the 23 sports that have participated in VOP at least once: The analysis uses data from the most recent measurement of each of 23 sports, up to April 2023 wave (see next page for sports included). Each sport provides 1/23 of the result so that the overall view doesn't simply reflect the experiences of participants of those sports with much greater numbers of participants. Therefore, for any measure, the overall result reported is the average of the 23 individual results.

In this report, for simplicity, we comment on results in terms of members. For example, 66% of members are very/extremely satisfied with their club experience. In reality, this is not based on the total number of members, but an average of the 23 results given to the 23 sports. That is:

- Sport 1's result plus sport 2's result plus sport 3's resultplus sport 23's result divided by 23.

Additional notes:

- Sub-group analysis (e.g. results by age, gender, etc): where there are fewer than 30 respondents in a sub-group for a particular sport, this sport is excluded from the analysis.
- Where the last survey for a particular sport was carried out before the winter 2018 wave, the age categories used were 13-19 years and 20-34 years. After this time, the age groups were changed to 13-18 years and 19-34 years. For simplicity during this report, the charts and tables just reference the age groups 13-18 years and 19-34 years.
- For those under 16 years, in most cases parents/guardians complete the survey on behalf of the young person. When the report refers to 5-12 year olds, the large majority of responses will have been by parents/guardians, whereas for 13-18 year olds, it is evenly divided between parent/guardian and self completion by the young person. Some young people complete the survey themselves, where they have parent/guardian permission.
- When the report refers to percentage changes (i.e. +/- x%), these are percentage-point changes.
- This report does not identify individual sports within results.

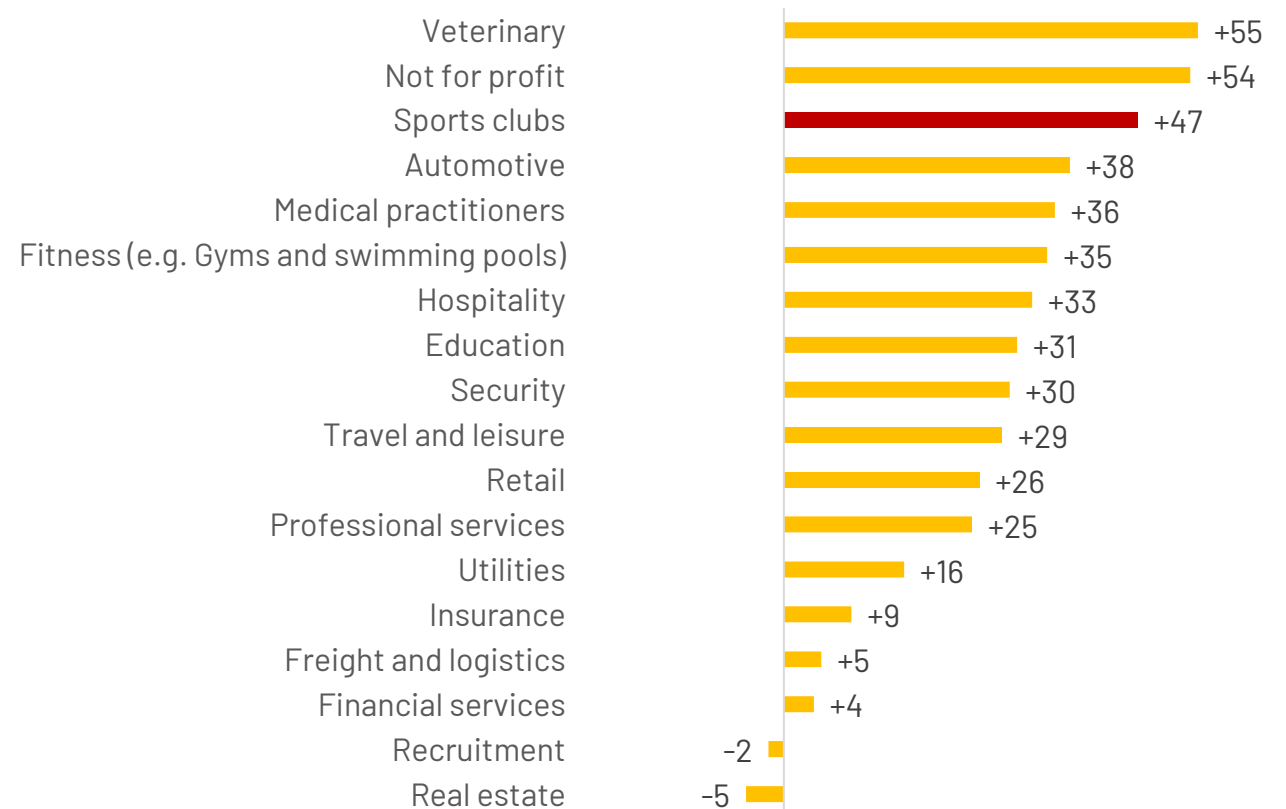
Sports included in this report and when they took part in VOP

| NSO | When they first completed VOP | When they last completed VOP |
|---------------------------|-------------------------------|------------------------------|
| Gliding NZ | - | 2017 Summer |
| Bowls NZ | - | 2017 Summer |
| Badminton NZ | 2017 Winter | 2018 Winter |
| NZ Water Polo | - | 2019 Winter |
| NZ Football* | 2016 Winter | 2019 Winter |
| Swimming NZ | - | 2020 Summer |
| Waka Ama NZ | 2017 Summer | 2020 Summer |
| Basketball NZ | 2017 Winter | 2020 Winter |
| International Taekwan-do* | - | 2021 Summer |
| Surfing NZ | - | 2021 Summer |
| Athletics NZ | 2017 Summer | 2021 Summer |
| Softball NZ | 2018 Summer | 2021 Summer |
| Surf Life Saving NZ | 2018 Summer | 2021 Summer |
| Tennis NZ | 2019 Summer | 2021 Summer |
| Hockey NZ* | 2017 Winter | 2021 Winter |
| Yachting NZ | 2019 Winter | 2021 Winter |
| Touch NZ | 2017 Summer | 2022 Summer |
| NZ Rugby League | 2016 Winter | 2022 Winter |
| Netball NZ | 2016 Winter | 2022 Winter |
| NZ Rugby* | 2017 Winter | 2022 Winter |
| NZ Football (Futsal) | 2018 Winter | 2022 Winter |
| NZ Golf | 2017 Summer | 2023 Summer |
| NZ Cricket | 2017 Summer | 2023 Summer |

The average 'Net Promotor Score' for sports clubs compares very favourably to a range of other contexts

- Net Promoter Score (NPS) is an indicator of customer engagement and advocacy levels, used in a variety of industries and contexts. It is based on a question that asks how likely a customer will recommend a product or service to others, on a scale of 0-10.
- Possible NPS scores range from -100 to +100. To calculate NPS, you subtract the percentage who are detractors (ratings of 0 to 6 out of 10) from the percentage who are promoters (ratings of 9 to 10 out of 10).
- The average NPS across the 23 sports in VOP is +47.

NPS by 'industry'



Ngā mihi