



COMMUNITY SPORT VOP PROGRAMME

HOCKEY NEW ZEALAND

October 2018



CONTENTS

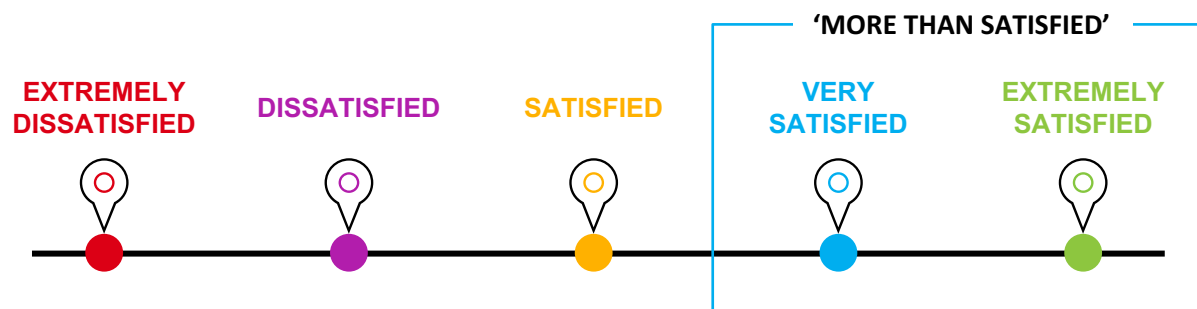
INTRODUCTION	3
EXECUTIVE SUMMARY	6
KEY RESULTS	8
Key Metric Results	9
Main Findings	10
What Is Causing These Ratings	20
Length of Membership & The Joining Process	29
Sideline Behaviour & Club Environment	33
Competition Structure	39
Injury Management	44
Demographic Differences	48
Regional Hockey Associations	56
SAMPLE PROFILE	69
BACKGROUND, OBJECTIVES AND APPROACH	77
APPENDIX	81

INTRODUCTION

This report looks at the results for Hockey New Zealand to understand the club experience of their members in 2018. 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 is the second time Hockey New Zealand has participated in this research, and more than 31,000 affiliated hockey club members were invited to complete the survey, with adults aged 16+ completing it themselves (‘players’) and parents/guardians (‘parents’) completing the survey for children under the age of 16, on behalf of their child. In 2018, there was a higher proportion of parent respondents compared with 2017 (70% player / 30% parent in 2018 cf. 76% player / 24% parent in 2017).

When level of satisfaction is referenced in this 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.

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 Total Hockey 2018
- ▲ / ▼ The Total Hockey 2018 result is significantly higher / lower than the Total Hockey 2017
- / □ The Total Hockey 2018 result is significantly higher / lower than the total for All Sports 2017/18

TOTAL

When comparing results, 'cf.' is used as an abbreviation of 'compare'. When comparing with the total, 'All Sports 2017/18' is used. This is the total sample from 2017/18 i.e. an average of the sports that participated in winter 2017 and summer 2018.

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

No weighting was applied to these results. Please refer to the Sample Profile section to understand who responded.

TOP TEAM OR HIGHER

Top team or higher relates to respondents who have played for the top team within their age group at their club/or, represented the club at a regional event/competition, represented the region at a national event/competition and/or represented New Zealand at an international event/competition.

EXECUTIVE SUMMARY

KEY METRICS

Overall, Hockey New Zealand's 2018 results are mixed - particularly when compared with 2017 and the average for all sports in 2017/18. Of note, key metric results which remain positive are;

- 66% of respondents are more than satisfied with the overall experience of playing hockey at their club
- 83% indicate they are likely or very likely to rejoin their club next season
- 56% of new members of their club are more than satisfied with the overall process of joining their club.

Results which are not quite as positive are:

- 65% of respondents agree or strongly agree they get value for money (cf. 66% in 2017 and 73% for All Sports 2017/18)
- NPS, an indicator of a respondents' likelihood to recommend their club, is significantly lower than in 2017 (+40 cf. +44) and significantly lower than All Sports 2017/18 (also +44).

DRIVERS OF THE EXPERIENCE

Being professional and well managed is the top driver of recommendation for hockey clubs. *Allowing me to fulfil my potential and fair and equal opportunities* are now more impactful and among the top three drivers, replacing *being friendly and welcoming* and *fostering a sense of pride in our club*.

The focus should be on ensuring members feel they can reach their potential. Additionally, ways to improve *being responsive to their needs and requirements* and *the quality of coaching* should be investigated given the comparatively low performance and high level of importance of these drivers.

COMPETITION STRUCTURE & SIDELINE BEHAVIOUR

When it comes to the competition duration, almost all respondents (93%) feel the length of games are 'about right' and 72% feel the length of the season is 'about right'. Close to a quarter of respondents (23%) feel the season is 'too short'.

Two in five (39%) respondents have witnessed or experienced inappropriate behaviour by a spectator, coach or official at least occasionally while they or their child played in the last 12 months. Five percent indicate this is almost every time or every time - this can impact retention. Respondents who witness/experience inappropriate behaviour with this frequency are significantly more likely to say they are very unlikely to rejoin next season (15% cf. 4%).

EXECUTIVE SUMMARY

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

Officiating (i.e. *having qualified/experienced officials available when I compete*) remains the area respondents indicate they are least satisfied with (19%) – particularly players (23%) compared with parents of players (10%). This is followed by around one in ten respondents indicating they are least satisfied with *the quality of coaches* (10%), *value for money* (10%), *fair and equal opportunities* (9%) and *ease of accessing club venues/fields* (9%).

When asked where clubs should invest, assuming any investment would require an increase in fees, 17% of respondents indicate they do not want anything improved if it meant their fees were to increase. Among those who would, the most commonly mentioned aspect for improvement is *player development programmes* (23%), followed by the *quality of coaching* (17%) and *officiating* (13%).

MEMBERSHIP CHARACTERISTICS

Respondent motivations for belonging to a club are consistent with 2017. That is, *to play competitively* (36%), followed by *to have fun* (26%) and *to learn/improve skills* (17%). *To learn/improve skills* is particularly important among parents (30% cf. 11% of players).

As identified in 2017, there is and remains a consistent trend in results over a member's tenure at their club. That is, results are consistent with a slight dip from members of 1-2 years before increasing to the highest results among members of more than 10 years. The exception is value for money which drops as tenure increases, before increasing among the those who have been members for more than 10 years.

There is a slightly higher reporting of injuries in 2018 (46% cf. 43% in 2017). However, a significantly lower proportion made an ACC claim (57% cf. 68%) and missed more than a month as a result of their injury (16% cf. 19%).

EXECUTIVE SUMMARY

DIFFERENCES ACROSS HOCKEY ASSOCIATIONS

Overall, results are relatively consistent across associations. North Harbour and Poverty Bay are the strongest performing associations with higher or significantly higher results across most of the key metrics. Conversely, Northland and Nelson have lower or significantly lower results across each of the key metrics. Not only do respondents from Nelson Hockey tend to be less enthusiastic, but they are also significantly more likely to be dissatisfied with their overall experience, disagree they get value for money or be detractors of their club.

These trends continue across the key and secondary drivers of club experience. Of the key drivers that may be worth noting across multiple associations;

- ▶ *Providing information when needed* – significantly lower for Northland, Auckland, and Nelson
- ▶ *The quality of coaches* – significantly higher for North Harbour, Poverty Bay and Canterbury.

If fees increased, respondents of the following associations are significantly more likely to want this increase to be reflected in:

- ▶ *Officiating* – Northland, North Harbour, and Hawke's Bay
- ▶ *Playing/ training fields/ venues* – Tauranga and Central Otago.

DEMOGRAPHIC DIFFERENCES

Across key age brackets, results are mixed. Those of primary/intermediate age (5-12 years) are the most satisfied with their club experience (70%) and perceive better value for money (73%), but have a lower rate of referral (NPS of +38). Secondary school aged respondents (13-18 years) are least likely to rejoin (78%) or recommend their club (NPS of +30). Young adults (19-34 years) are least satisfied with the overall experience at their club (60%) and value for money (54%).

Results are significantly more positive for male respondents across each of the key metrics (except for satisfaction with the joining process). Female respondents are significantly less likely to recommend their club to someone interested in playing hockey and their result is significantly lower than in 2017 (NPS of +38 cf. +44 for males and +43 in 2017).

Respondents of European ethnicity are typically most satisfied with their club experience. The lowest results are among Pasifika respondents, particularly overall satisfaction, satisfaction with the joining process and their likelihood to recommend their club.

KEY INSIGHTS



Hockey New Zealand is performing well in some key areas and has challenges in others (compared with other sports).



Allowing me to fulfil my potential should be an area of focus due to the relatively low performance and above-average importance on a respondent's likelihood to recommend their club.



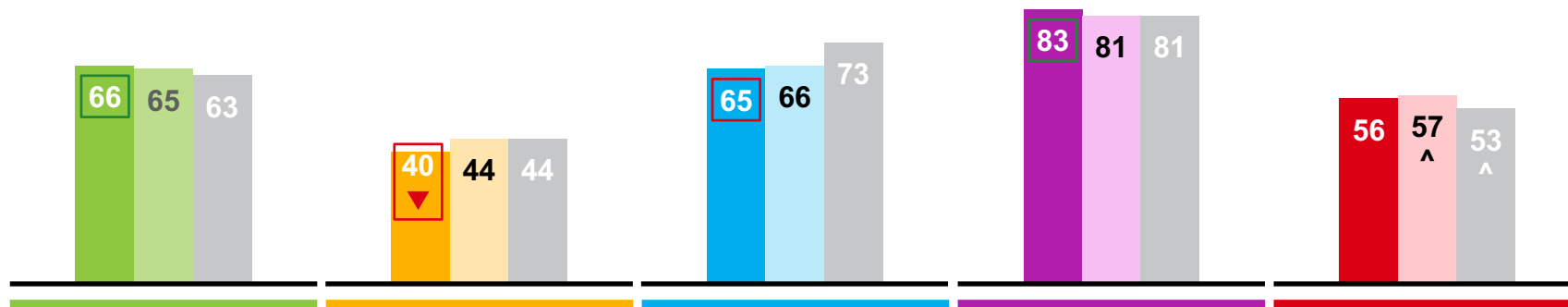
When asked where clubs should invest, assuming any investment would require an increase in fees, a quarter of respondents would want their club to invest in *player development programmes*.



In the last 12 months, two in five respondents have witnessed or experienced inappropriate behaviour while they or their child played hockey.

KEY METRIC RESULTS

Overall, results are mixed from 2017.



SATISFACTION

(Q6: % very satisfied or extremely satisfied)

Two-thirds (66%) of respondents are more than satisfied with the overall experience of playing hockey at their club – a similar result to 2017 and significantly higher than All Sports 2017/18 (63%).

NPS

(Q7: % promoters less % detractors)

Net Promoter Score (NPS) is significantly lower than both the 2017 hockey result and All Sports 2017/18 (+40 cf. +44).

VALUE FOR MONEY

(Q11: % agree or strongly agree)

Two-thirds (65%) of respondents feel they get 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 the same proportion as 2017 and a significantly lower result than All Sports 2017/18 (73%).

LIKELIHOOD TO REJOIN

(Q9: % likely or very likely)

More than four in five (83%) indicate they are likely to rejoin their current club next season. An improved result from 2017 and when compared with All Sports 2017/18 (both 81%).

JOINING PROCESS[^]

(Q20: (R6) % very satisfied or extremely satisfied)

For new members (first year at the club), 56% are more than satisfied with the overall process they went through when they joined. Direct comparisons are not applicable due to the change in metric in 2018 (previously average of four joining process attributes).

- Total Hockey 2018
- Total Hockey 2017
- All Sports 2017/18

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

Q6 (n= 2259)/ Q7 (n=2247)/ Q11 (n=2221)/ Q9 (n=2085)/ Q20 R6 (n=454)[^]

[^] please note change in metric in 2018 (previously average of four joining process attributes)

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

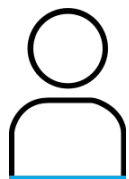
MAIN FINDINGS

PLAYING COMPETITIVE HOCKEY CONTINUES TO BE THE MAIN REASON TO BELONG TO A CLUB

More than one third (36%) of hockey respondents say the main reason they belong to a club is *to play competitively*. Other top mentions include belonging to a club to *have fun* (26%) and *to learn/improve skills* (17%).

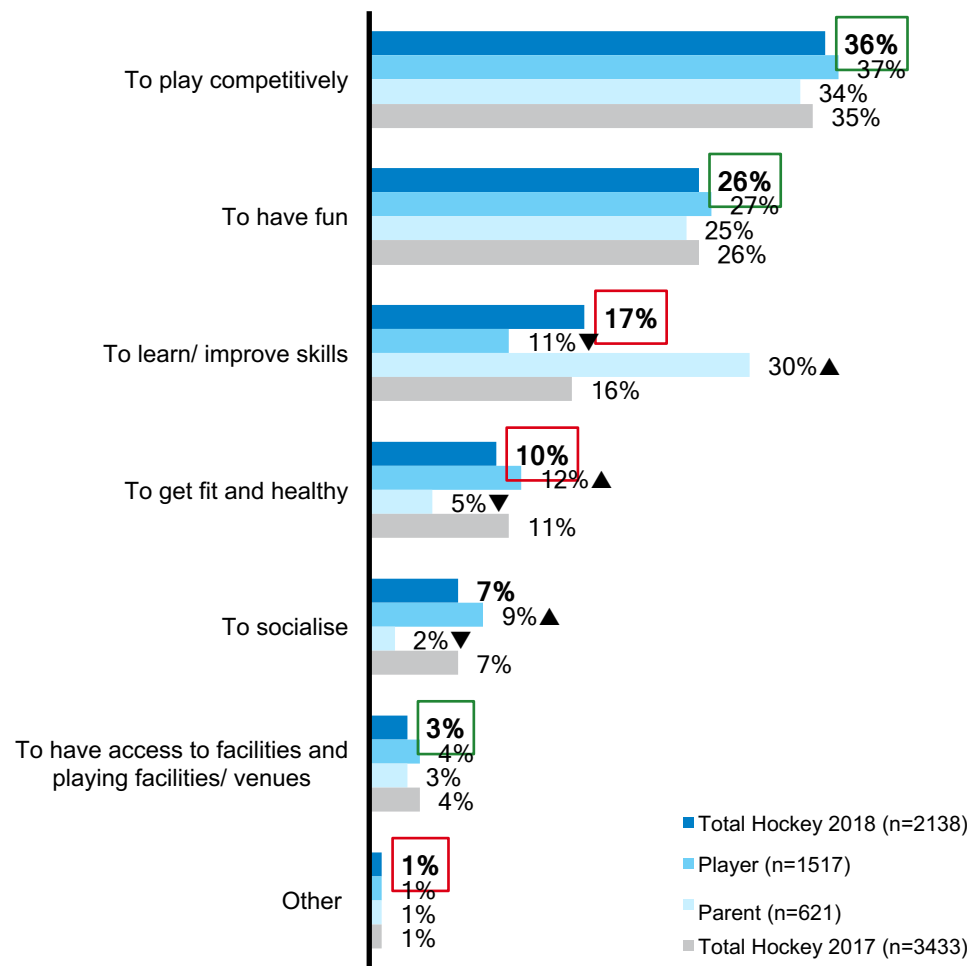
Parents of players are significantly more likely than players to say the main reason their child belongs to a hockey club is *to learn/improve skills* (30% cf. 11%).

Those **significantly more likely** to belong to a club to *play competitively*:



- ▶ Those who play or train four or more times per week (54% cf. 36%)
- ▶ Those who have been a member for 6-10 years (44%)
- ▶ Those who (if fees increased) would like their club to invest in *player development programmes* (43%)
- ▶ Those of secondary school age (13 – 18 years) (44%)
- ▶ Those who hold the role of coach or instructor (42%)
- ▶ Those who play for the top team or higher at their club (55%).

REASONS FOR BELONGING TO A CLUB



▲▼ Significantly higher/lower than Total Hockey 2018

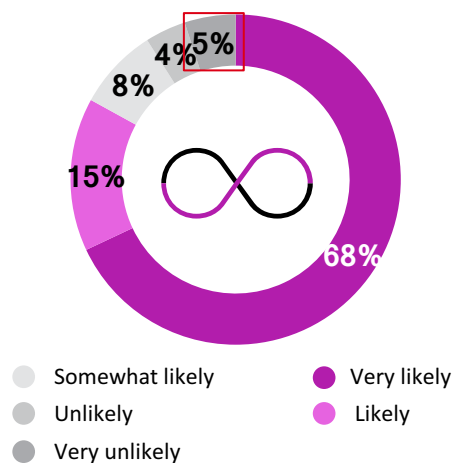
▲▼ Significantly higher/lower than Total Hockey 2017

□ / □ Significantly higher/lower than All Sports 2017/18

MORE THAN FOUR IN FIVE MEMBERS INTEND TO REJOIN THEIR CURRENT CLUB NEXT SEASON

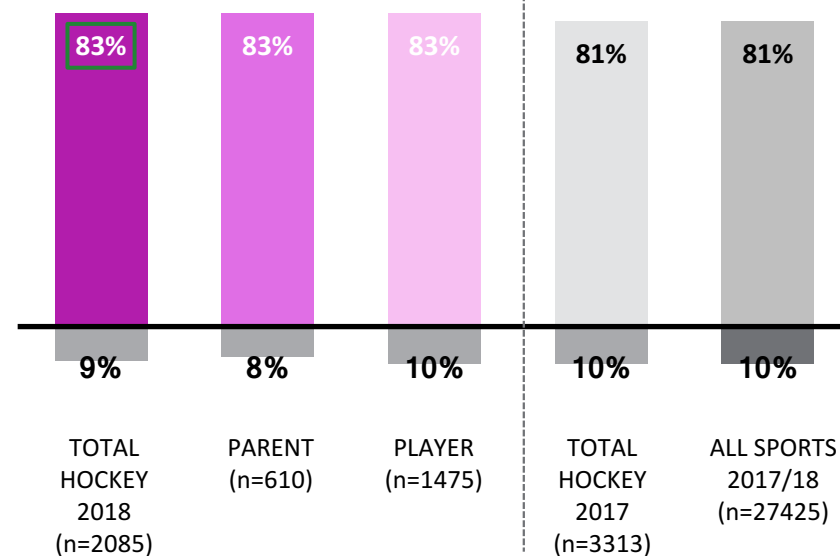
Compared with the total for all sports in 2017/18, hockey respondents are significantly more likely to intend to rejoin their current club next season (83% cf. 81%). Fewer than one in ten (9%) indicate they are *unlikely* or *very unlikely* to rejoin.

LIKELIHOOD TO REJOIN



LIKELY OR VERY
LIKELY TO REJOIN

UNLIKELY OR VERY
UNLIKELY TO REJOIN



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

- ▶ Club Presidents or other office holders (95% cf. 83%) and/or committee members (92%)
- ▶ Those who are promoters (highly likely to recommend) (94%)
- ▶ Those who are more than satisfied with their overall club experience (93%)
- ▶ Those who perceive they are getting value for money from their club (91%)
- ▶ Those who are more than satisfied with the process they went through when they joined the club (91%)
- ▶ Those who would want their club to invest in facilities e.g. club rooms, changing rooms, toilets (91%) if fees increased.

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

- ▶ Those who are more than dissatisfied with their overall club experience (31% cf. 83%)
- ▶ Those who are detractors (not likely to recommend) (40%)
- ▶ Those who perceive they are not getting value for money from their club (45%)
- ▶ Those who are more than dissatisfied with the process they went through when they joined the club (52%)
- ▶ Those who play or train less than once a week (66%)
- ▶ Those who would want their club to invest in *quality of coaching* (72%) or *management of club* (62%) if fees increased
- ▶ Those of older secondary age (16 -18 years) (73%)
- ▶ Those of Māori ethnicity (76%).

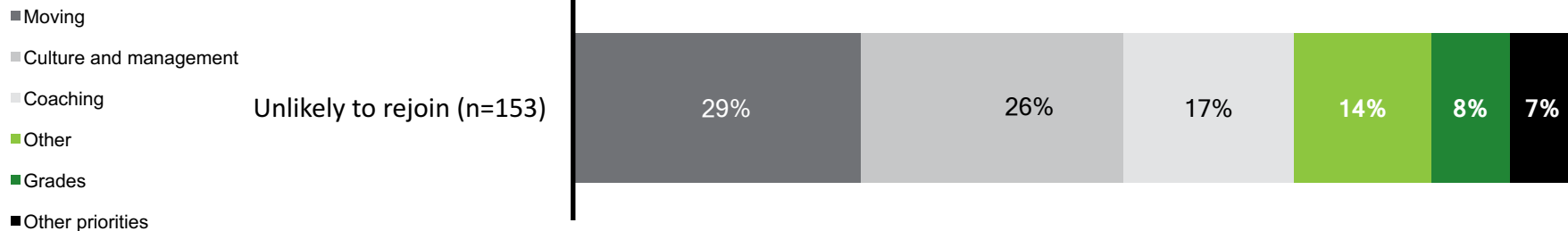
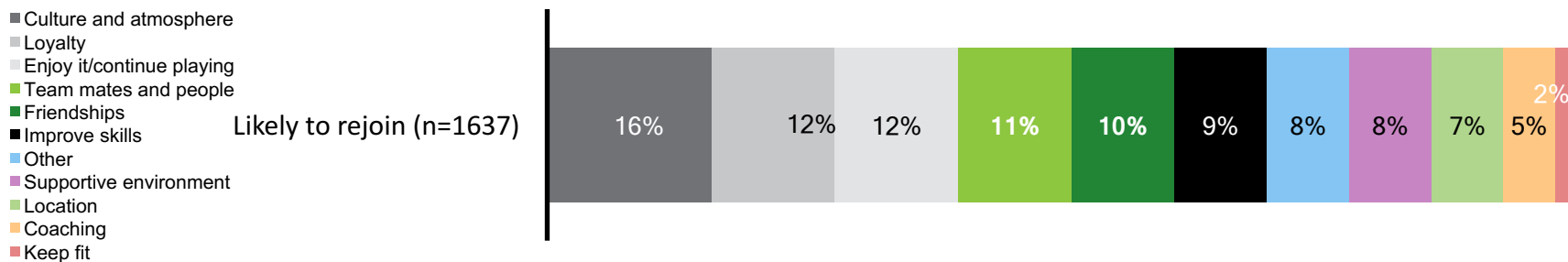
Base: All respondents who are members (Excluding Don't know/not applicable)

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

▲▼ Significantly higher/lower than Total Hockey 2018
 ▲▼ Significantly higher/lower than Total Hockey 2017
 □ / □ Significantly higher/lower than All Sports 2017/18

LIKELIHOOD OF REJOINING

Reasons behind a respondents likelihood of rejoining a club/association are varied. Text analysis of respondent comments revealed 11 key themes behind why respondents are likely to rejoin and 7 key themes why respondents are unlikely to rejoin.



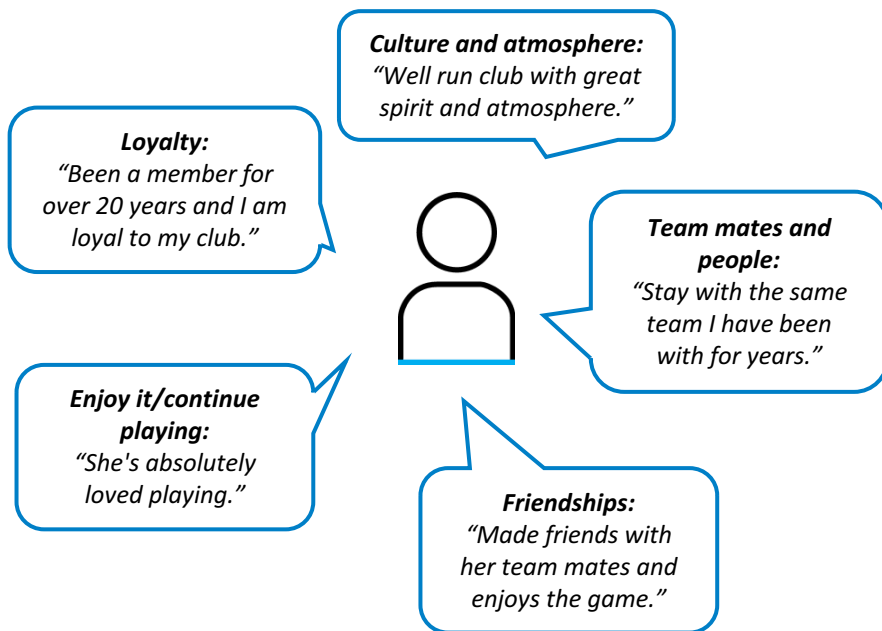
Base: Respondents who are members excluding 'somewhat likely' to rejoin (Q48 n=1637, Q49 n=153)
Q48/49. Why are/is you/your child <insert from Q9> to rejoin this <club/ association> next season?

REASONS RESPONDENTS ARE LIKELY TO REJOIN NEXT SEASON

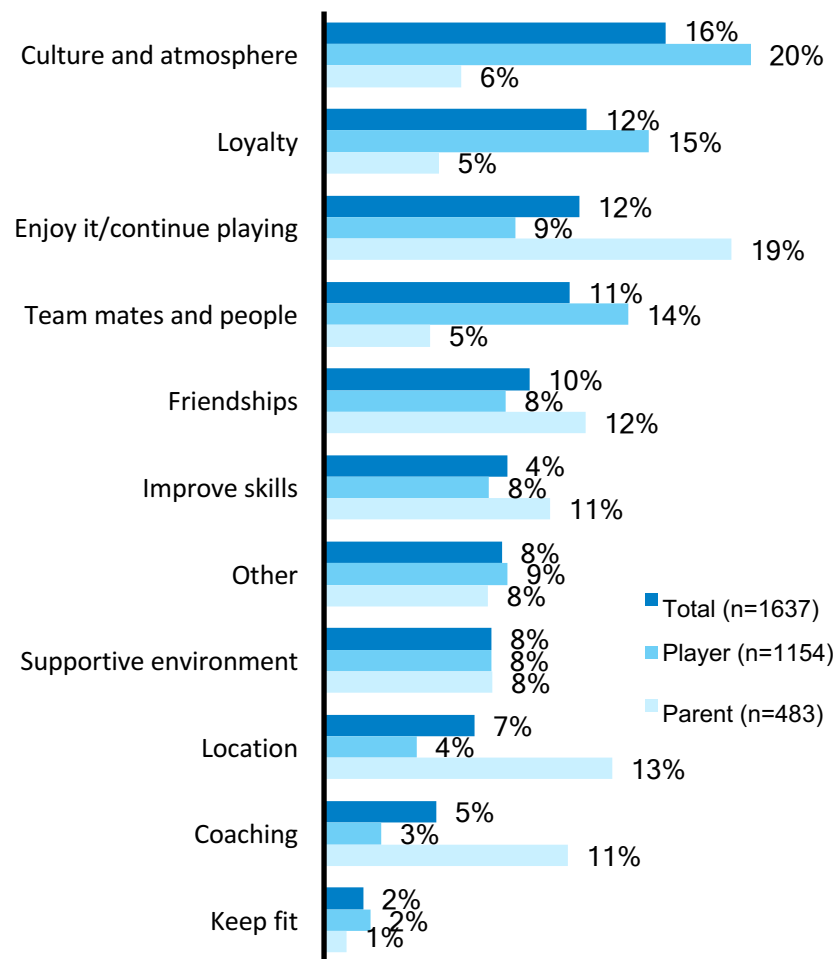
Reasons for rejoining are slightly different between players and parents.

Players cited reasons relating to social aspects such as culture and atmosphere (20%) and team mates and people (14%) as reasons for rejoining and had a much stronger club loyalty (15%) than parents (5%).

For parents, the enjoyment their child had with hockey was a key determinant of the decision to rejoin (19%). Parents also valued location of the club (13%) and the friendships their child had (12%).



REASONS FOR REJOINING A CLUB/ASSOCIATION



REASONS RESPONDENTS ARE UNLIKELY TO REJOIN NEXT SEASON

Reasons for not rejoining are similar for both players and parents. Moving was the strongest factor for not rejoining for both players (29%) and parents (28%).

For parents coaching was seen as another major reason for not rejoining (28%).

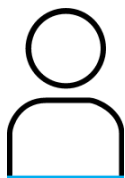
The management and culture of the club was the next biggest reason why players (27%) and parents (24%) were unlikely to rejoin.

Club management:

"The club is very unorganized and they don't think about the wider picture. Its all about who you know not how good you are with the team selections."

Coaching:

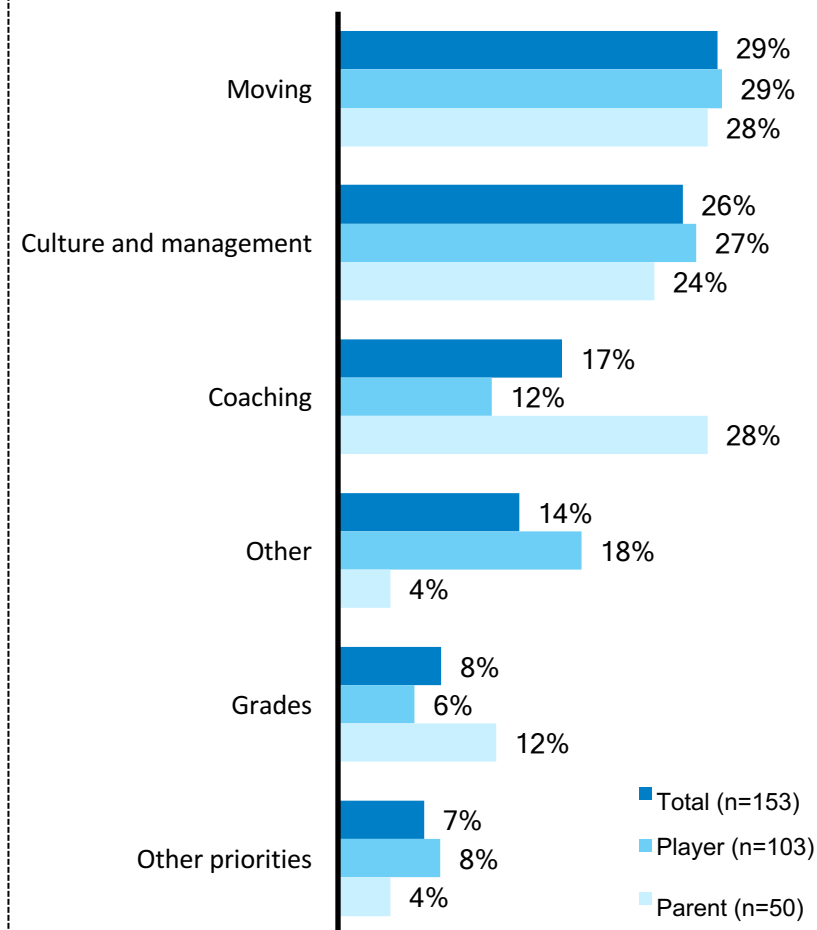
"She plays in the backs and doesn't believe she is receiving any assistance from her coach. The coach is focused on attacking players, mainly strikers & PC's."



Other:

"I've changed sport for cost reasons."

REASONS FOR NOT REJOINING A CLUB/ASSOCIATION



REASONS RESPONDENTS ARE LIKELY OR UNLIKELY TO REJOIN NEXT SEASON

I am involved in the management of the club, so my success and its success are deeply intertwined.
Player, 25 -29 Years, Canterbury

Because she is having the best time and learning new skills. She finds the coaches really friendly, helpful and encouraging.
Parent, 14 Years, Auckland

I have been associated with this club for years and feel loyalty to continue to support my team.
Player and Parent, 50 -54 Years, Manawatu

The club refuses to supply referees for Sunday games, regardless of us having the highest fees of any club in Palmy.
Player, 30 – 34 Years, Manawatu

Too disorganised, lack of communication. Never know how many players are going to turn up.
Player, 50 – 54 Years, Waikato

Lack of quality coaching – looking to move to a club with a more professional and competitive attitude towards coaching, skills training and game strategy.
Parent, 14 Years, Canterbury

LIKELY

UNLIKELY

It's a family oriented club with teams in all grades from prems to div 3. Fantastic club spirit, with older players mentoring younger ones. Great youth program. Excellently well run club, good strategic vision with accounts on Xero, very active committee and a wide range of social activities.

Player and parent, 55 -59 Years, Auckland

Karori has a great group of people who are passionate about the game, the fees are some of the lowest in Wellington and the club organises fun social events.

Player, 25 -29 Years, Wellington - Wairarapa

The club has seemed very disorganised this year. There were no formal trials. Experienced players have been put in teams with first year players. No goalie gear was provided for the first few games, incorrect venue given for first games, etc.
Parent, 15 Years, Auckland

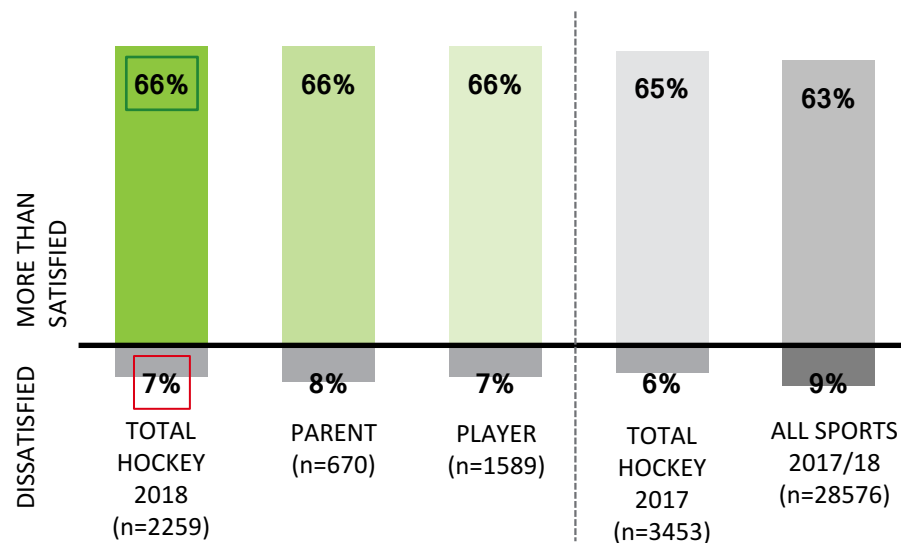
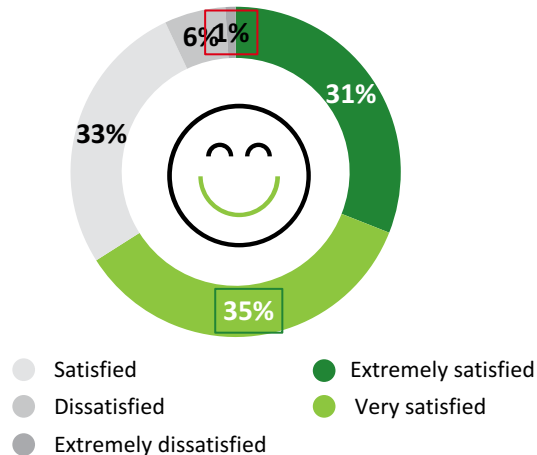
The team has been great but communication with the club admin has been very rude and abrasive right from the time of registering to trial. They are less than friendly and welcoming.

Parent, 15 Years, Auckland

TWO-THIRDS OF RESPONDENTS ARE MORE THAN SATISFIED WITH THEIR CLUB EXPERIENCE

Results are on par with 2017 and significantly higher than All Sports 2017/18 (66% cf. 63%).

SATISFACTION WITH CLUB EXPERIENCE



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

- ▶ Those who perceive they are getting value for money from their clubs (82% cf. 66%)
- ▶ Those who are promoters (highly likely to recommend) (88%)
- ▶ Those who are likely to rejoin their club next year (75%)
- ▶ Those who would want their club to invest in *facilities e.g. club rooms, changing rooms, toilets* (79%), *playing/training venues/field/courts* (76%) or *quality of officiating* (73%) if fees increased
- ▶ Those who hold the role of *club president or another office holder* (78%).

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

- ▶ Those who are detractors (not likely to recommend) (6% cf. 66%)
- ▶ Those who perceive they are not getting value for money (15%)
- ▶ Those who are not likely to rejoin their club next year (34%)
- ▶ Those who would want their club to invest in *quality of coaching or instructors* (47%) or *management of the club* (28%) if fees increased
- ▶ Young adults (19–34 years) (59%).

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 hockey at your/ their club?

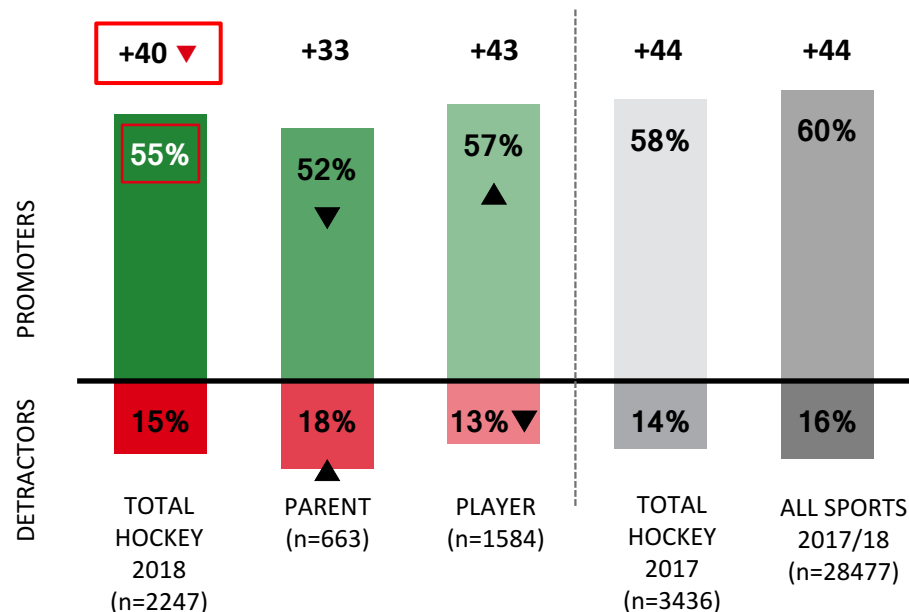
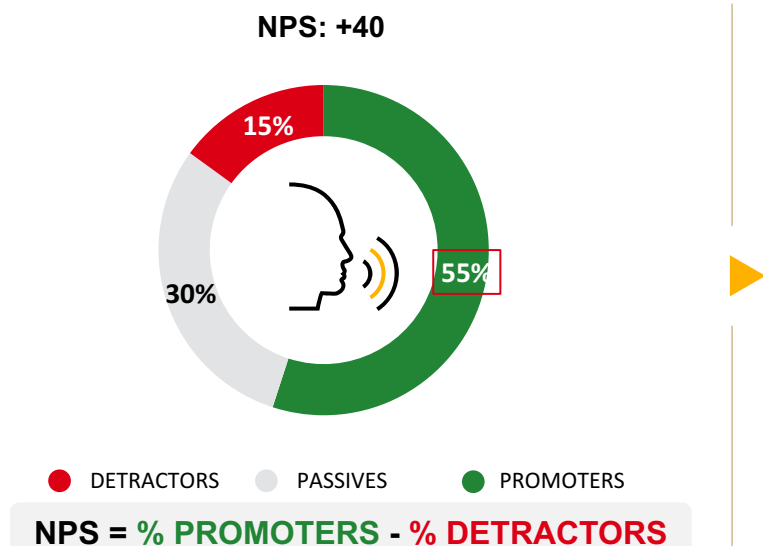
▲ ▼ Significantly higher/lower than Total Hockey 2018

▲ ▼ Significantly higher/lower than Total Hockey 2017

□ / □ Significantly higher/lower than All Sports 2017/18

MORE THAN HALF ARE LIKELY TO RECOMMEND THEIR CLUB

There is a slight decrease in the proportion of promoters from 2017 (55% cf. 58%), contributing to a significantly lower NPS (+40 cf. +44). Parents are significantly less likely to be a promoter of their club.



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

- ▶ Those who are more than satisfied with their overall club experience (73% cf. 55%)
- ▶ Those who perceive they are getting value for money from their club (67%)
- ▶ Those likely to rejoin their current club next season (63%)
- ▶ Those who have been a member for more than 5 years (67%)
- ▶ Those who would want their club to invest in *facilities e.g. club rooms, changing rooms, toilets* (66%) if fees increased
- ▶ Those who are adults (19+) (60%) or older adults (35+) (64%)
- ▶ Coaches or instructors (65%), team managers (74%), committee members (80%), officials/referees (65%), volunteers (77%) and/or club presidents or other office holders (89%).

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

- ▶ Those who are dissatisfied with their overall club experience (80% cf. 15%)
- ▶ Those who perceive they are not getting value for money from their club (58%)
- ▶ Those who are unlikely to rejoin their current club next season (49%)
- ▶ Those who would want their club to invest in *the management of the club* (47%) or *the quality of coaching* (27%) if fees increased
- ▶ Those who have witnessed or experienced inappropriate behaviour almost every time or every time (39%)
- ▶ From Nelson Hockey (29%).

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

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

Note: **Promoters** (score of 9 or 10); **Passives** (score of 7 or 8); **Detractors** (score of 0 to 6)

▲ ▼ Significantly higher/lower than Total Hockey 2018

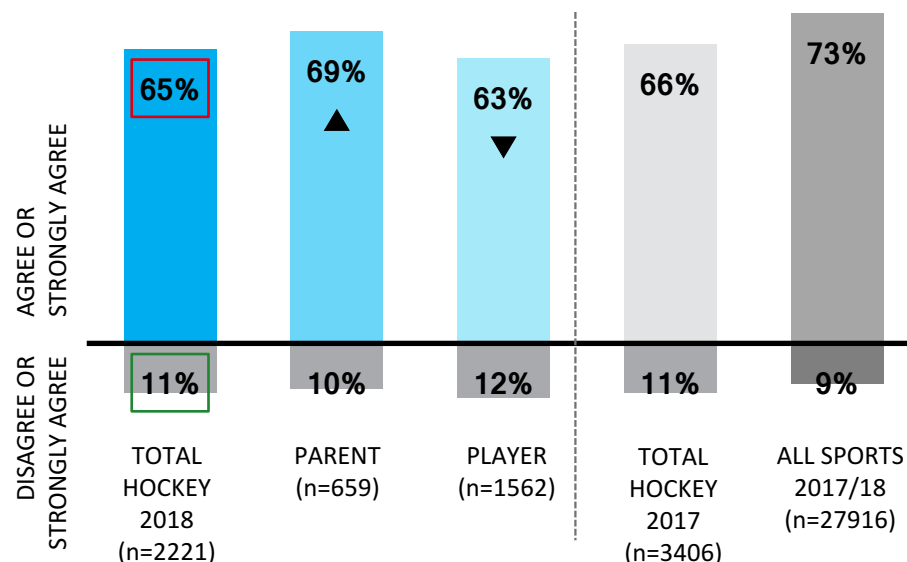
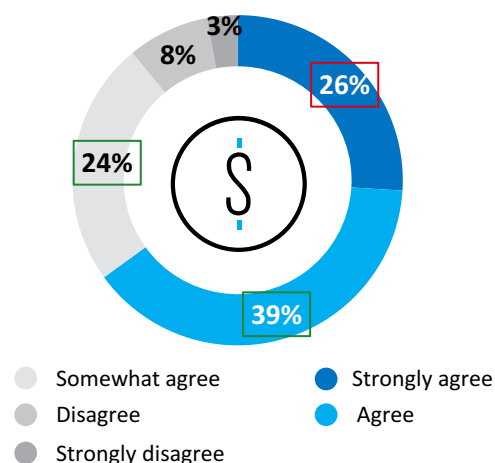
▲ ▼ Significantly higher/lower than Total Hockey 2017

□ / □ Significantly higher/lower than All Sports 2017/18

TWO-THIRDS OF HOCKEY RESPONDENTS PERCEIVE VALUE FOR MONEY FROM THEIR CLUB

Compared with the total for all sports, a significantly lower proportion perceive value for money from their hockey club (65% cf. 73%). Parents are significantly more likely to perceive value for money (69% cf. 63% of players).

PERCEIVED VALUE FOR MONEY



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

- ▶ Those who are more than satisfied with their overall club experience (80% cf. 65%)
- ▶ Those who hold the role of *club president or other office holders* (79%), *committee member* (73%) and/or *official/referee* (72%)
- ▶ Those who would want their club to invest in *facilities e.g. club rooms, changing rooms, toilets* (78%), *social activities* (76%), or *player development programmes* (71%) if fees increased
- ▶ Promoters (highly likely to recommend) (78%)
- ▶ Those of primary/intermediate age (5-12 years) (73%) or older secondary age (16-18 years) (70%)
- ▶ Those who are likely to rejoin their current club next season (71%).

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

- ▶ Those who are more than dissatisfied with their overall club experience (18% cf. 65%)
- ▶ Detractors (not likely to recommend) (20%)
- ▶ Those who would want their club to invest in *quality of coaching or instructors* (55%) or *management of the club* (33%) if fees increased
- ▶ Those who are unlikely to rejoin their current club next season (39%)
- ▶ Those whose main reason to belong to a club is to *get fit and healthy* (57%).

▲▼ Significantly higher/lower than Total Hockey 2018

▲▼ Significantly higher/lower than Total Hockey 2017

■ / ■ Significantly higher/lower than All Sports 2017/18

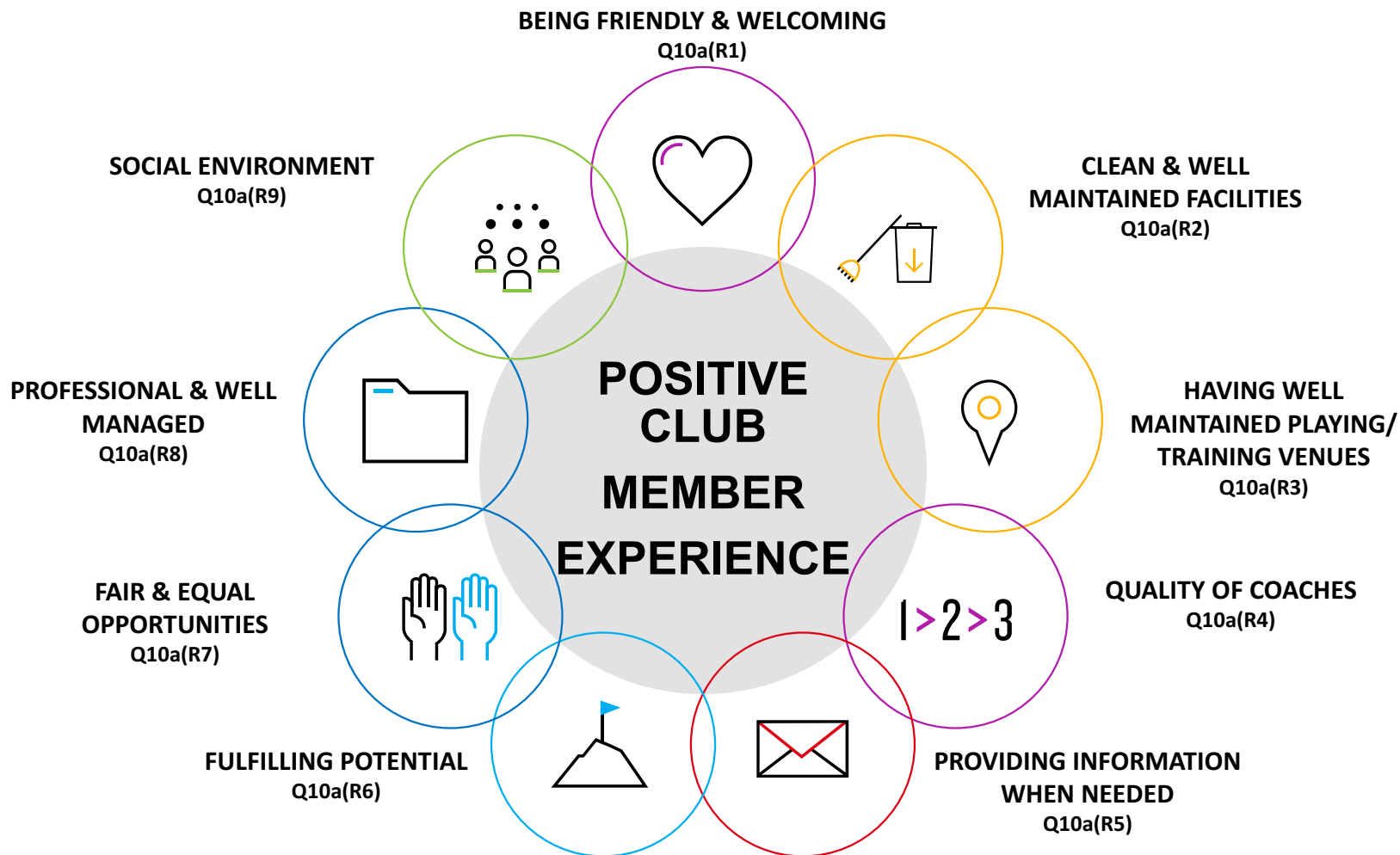
Base: All respondents (Excluding Don't know/not applicable)

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

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, CTD.

As well as the nine 'core' drivers of the club experience, based on the pilot results and in consultation with National Sporting Organisations (NSOs) the VOP survey also covers a number of secondary 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. Hockey New Zealand added the following:

- ▶ Communicating with you about the coaching, officiating and event opportunities and development provided by Hockey New Zealand (Q10b-R12).

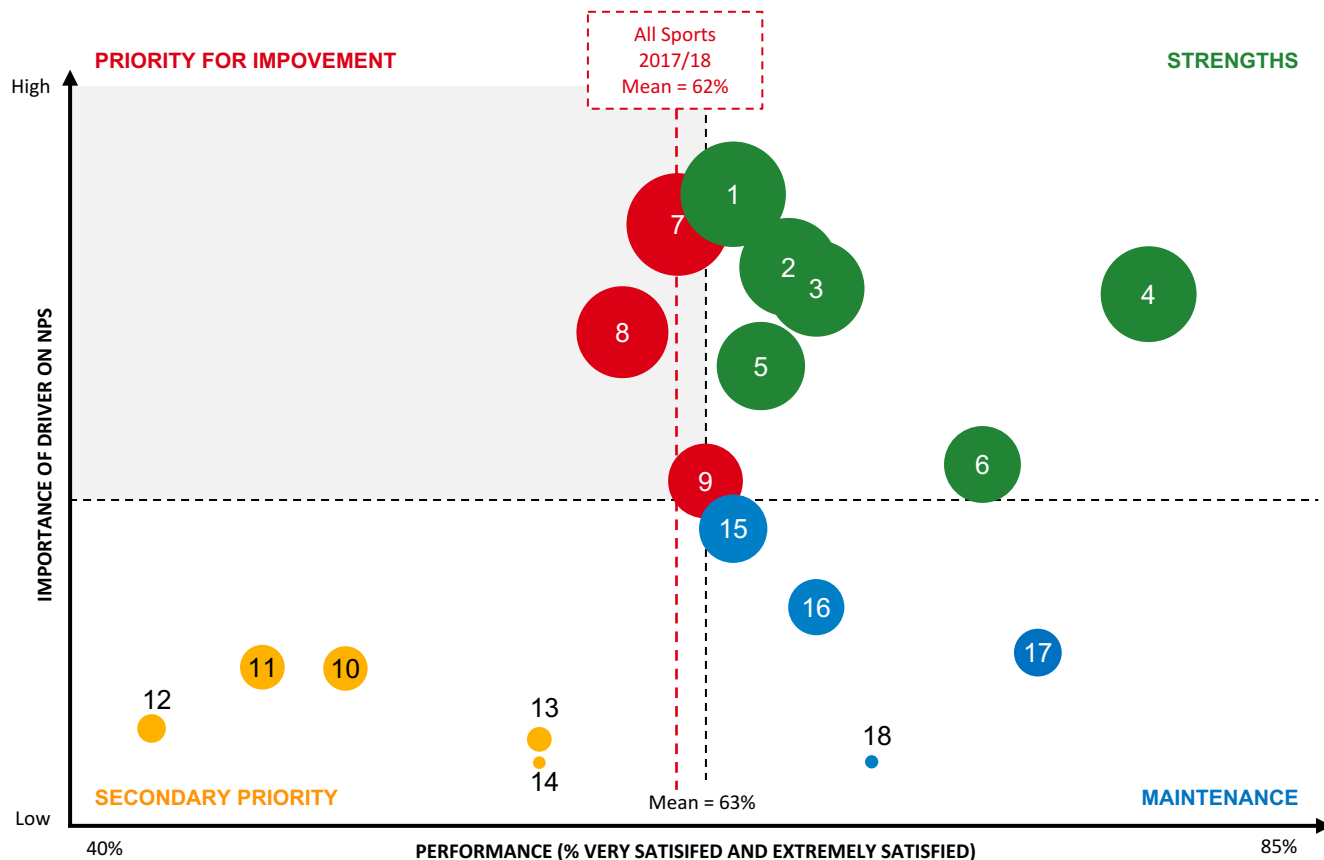
DRIVERS OF RECOMMENDATION (NPS)

The top three drivers of recommendation for hockey clubs are:

- *Being professional and well managed*
- *Allowing me to fulfil my potential*
- *Fair and equal opportunities.*

Of these top three drivers, emphasis should be placed on improving *allowing me to fulfil my potential* which has lower performance and is in the priority for improvement quadrant (alongside *being responsive to my needs* and *the quality of coaches*).

Note: This diagram shows the relative driver performance and importance for hockey clubs, it should be noted that performance is generally higher on all drivers compared with clubs/ associations of other sports, as shown on the following pages.



STRENGTH

1. Being professional and well managed
2. Fair and provides equal opportunities
3. Fostering a sense of pride in the club
4. Being friendly and welcoming
5. Value for money
6. Encouraging good sportsmanship and fair play

PRIORITY

7. Allowing me to fulfil my potential
8. Being responsive to my needs and requirements
9. The quality of the coaches

SECONDARY PRIORITY

10. Engaging with the local community
11. Communicating with you about the coaching, officiating and event opportunities and development provided by Hockey NZ
12. Having qualified / experienced officials
13. The ease of accessing the clubs venues/ fields
14. Having clean and well maintained facilities e.g. clubrooms, changing rooms, toilets

MAINTENANCE

15. The social environment at the club
16. Providing the information when needed
17. Providing a safe environment for adults and children
18. Having well maintained playing/ training venues/ fields

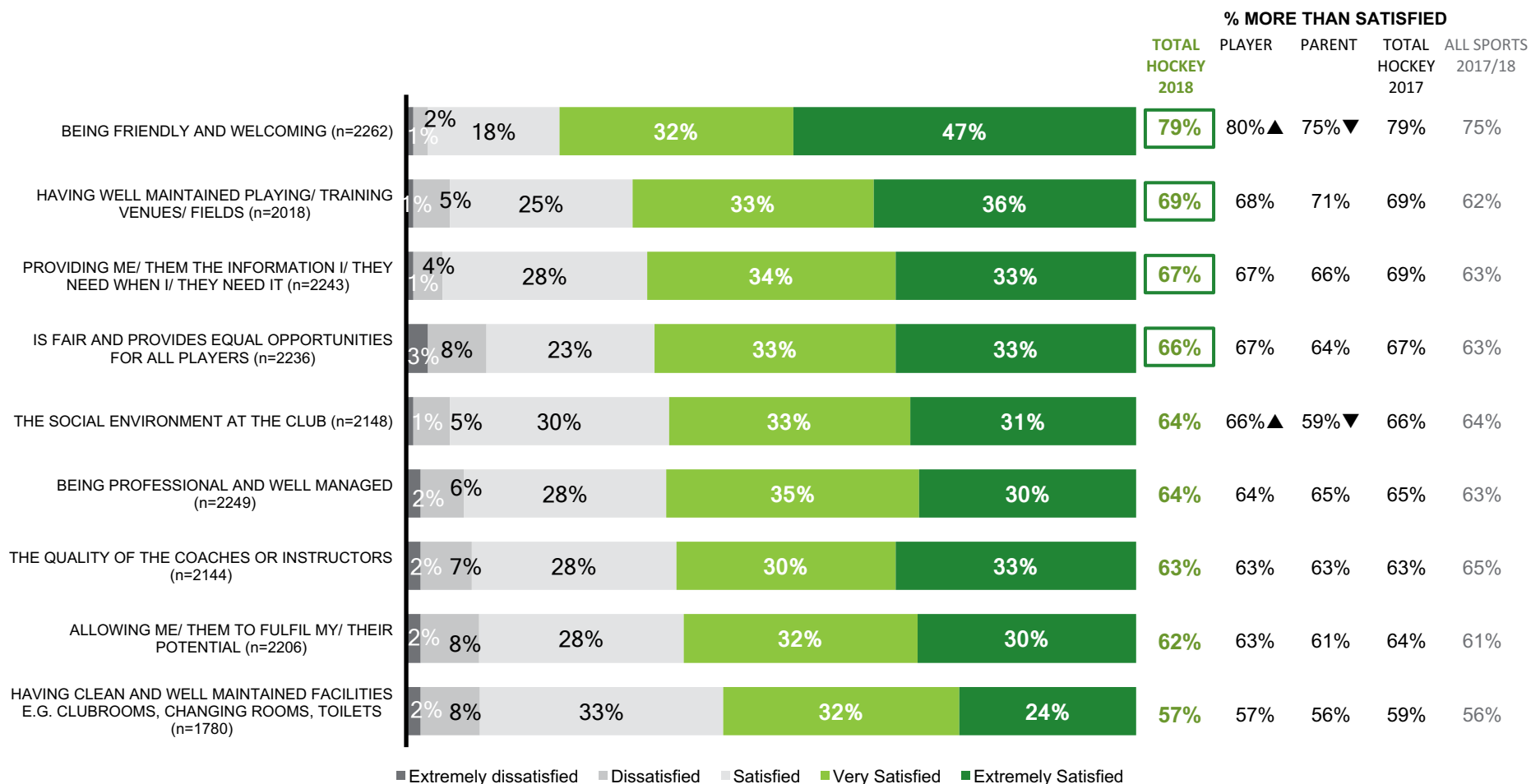
Base: Respondents who are members or play casually at a hockey club (Excluding Don't know/not applicable)
Q7. If [someone] asked you/ your child, how likely are you/they to recommend your/ their hockey club to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

For an explanation of regression, please refer to the appendix.

SATISFACTION: KEY DRIVERS

Overall, respondents rate hockey significantly higher than All Sports 2017/18 for four of the nine key drivers. The level of satisfaction with the key drivers is relatively consistent with 2017. Of the key drivers, respondents are most satisfied with *being friendly and welcoming* and *having well maintained playing/training venues/fields*.

Parents tend to be less satisfied with the club *being friendly and welcoming* and *the social environment*.



▲▼ Significantly higher/lower than Total Hockey 2018

▲▼ Significantly higher/lower than Total Hockey 2017

□ / □ Significantly higher/lower than All Sports 2017/18

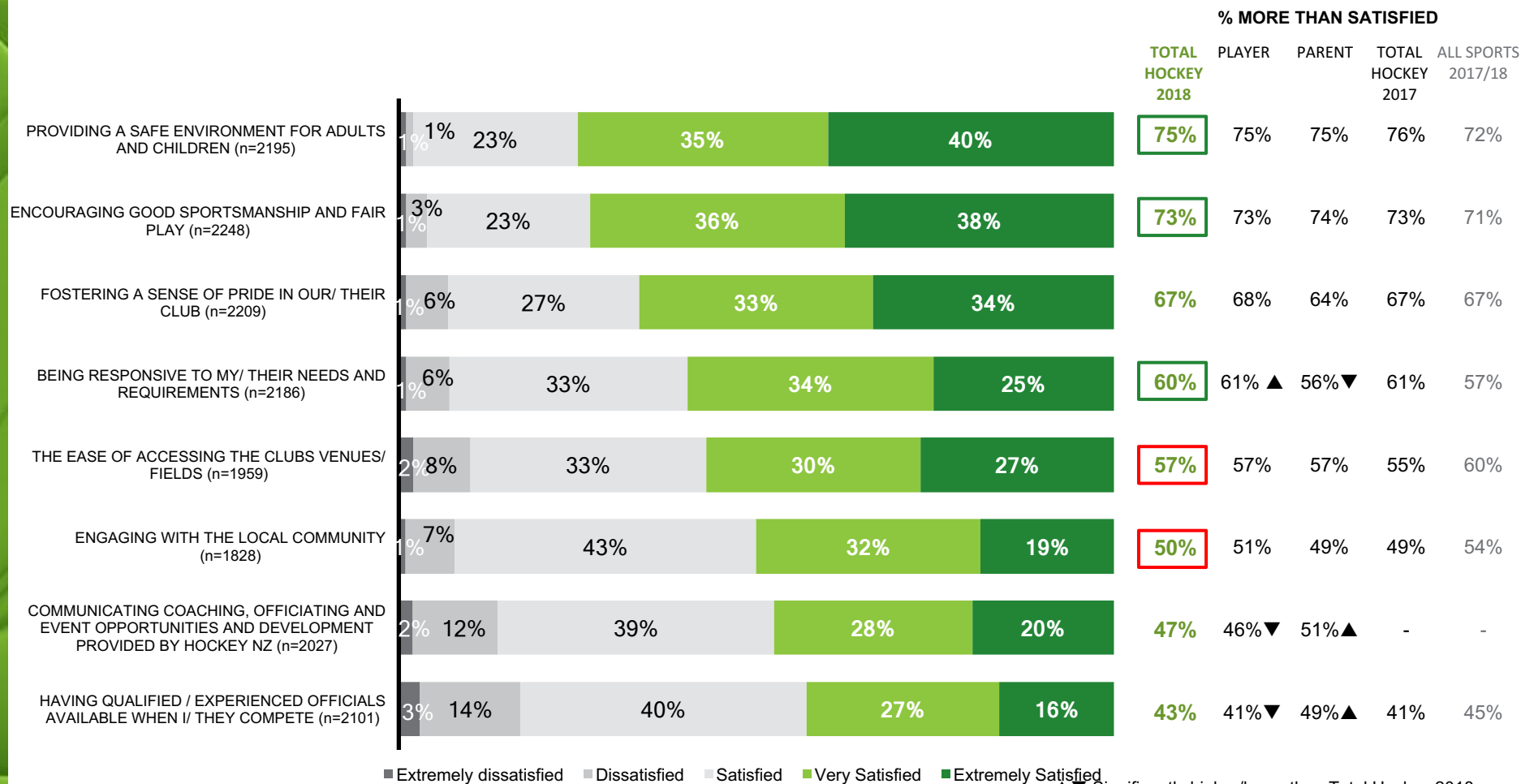
Base: All respondents (Excluding Don't know/not applicable)

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

SATISFACTION: SECONDARY DRIVERS

Performance in relation to secondary drivers is also consistent with 2017 results. Results range from 43% (*having qualified/experienced officials available*) to 75% (*providing a safe environment for adults and children*).

Compared with All Sports 2017/18, hockey's results are significantly higher for three of the secondary drivers and significantly lower for two (*the ease of accessing the club venues/fields* and *engaging with the local community*).



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

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

OVERALL, RESPONDENTS ARE LEAST SATISFIED WITH HAVING QUALIFIED/ EXPERIENCED OFFICIALS

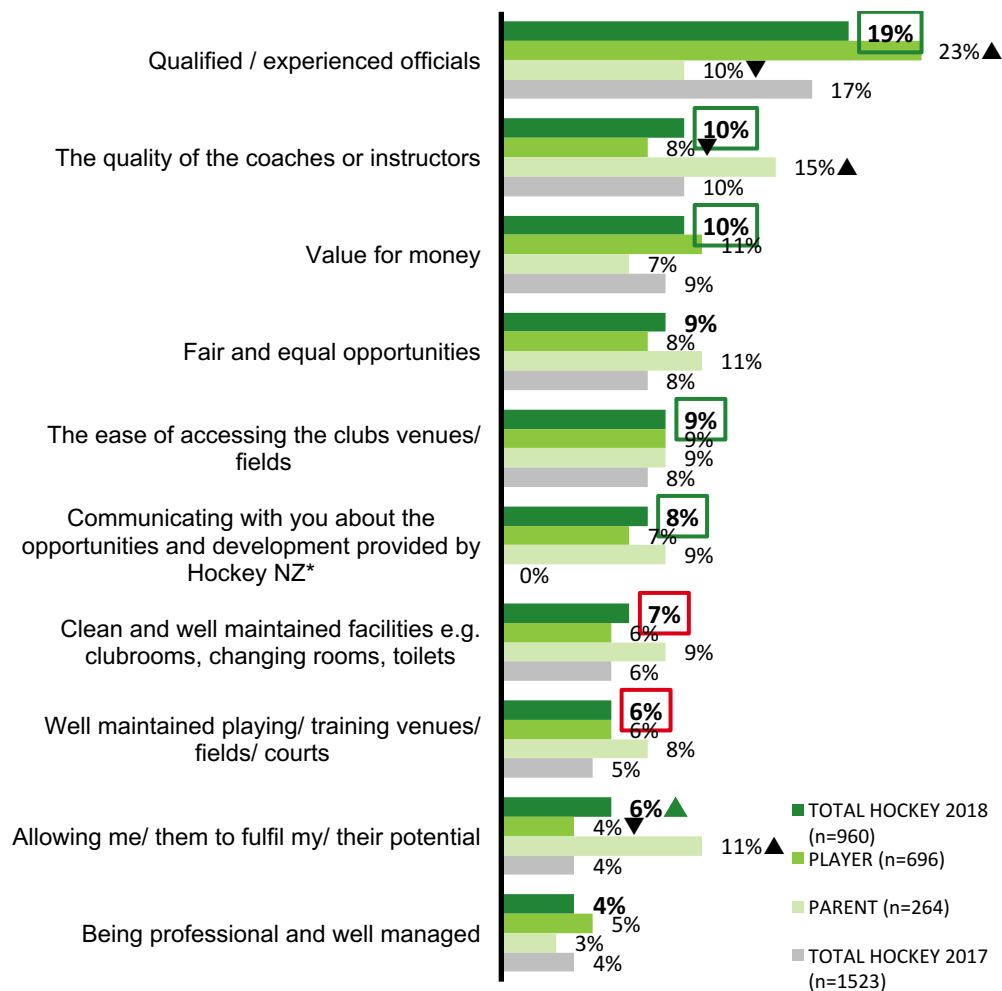
Respondents were asked to indicate the aspect they are **least satisfied** with.

Nearly one in five (19%) respondents were least satisfied with *having qualified/ experienced officials*, a significantly higher result compared with All Sports 2017/18 (13%).

Coaching (10% cf. 7%) and *value for money* (10% cf. 5%) are areas hockey respondents are also significantly more likely to mention.

Parents are significantly more likely to be least satisfied with *the quality of coaches or instructor* (15% cf. 10%) and *allowing me to fulfil my potential* (11% cf. 6%).

ASPECTS LEAST SATISFIED WITH



Base: All respondents who are dissatisfied/extremely dissatisfied or disagree/strongly disagree (n= 960)

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; * New statement asked in 2018

▲▼ Significantly higher/lower than Total Hockey 2018

▲▼ Significantly higher/lower than Total Hockey 2017

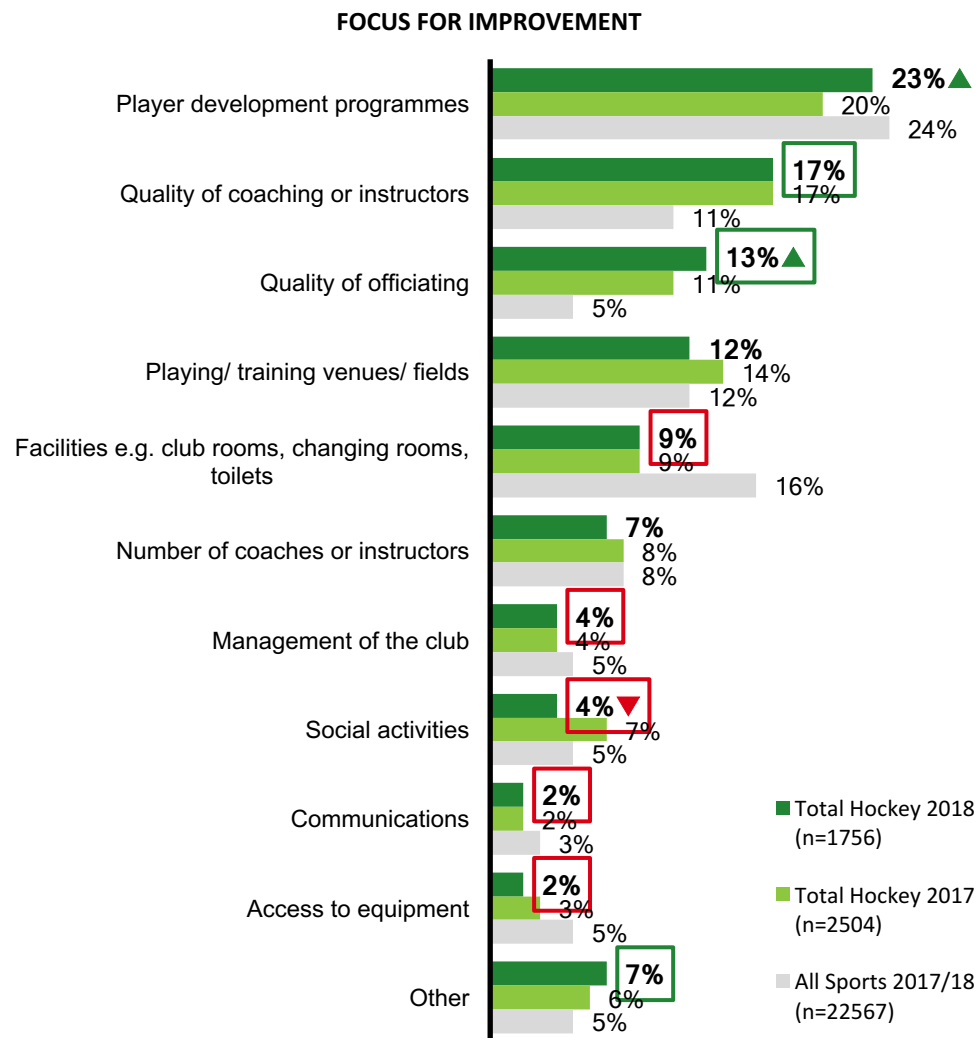
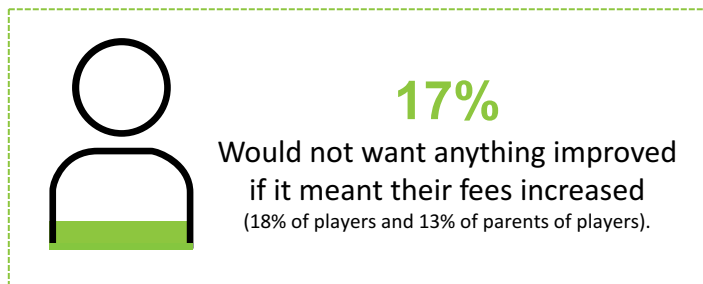
□ / □ Significantly higher/lower than All Sports 2017/18

A QUARTER WANT THEIR CLUB TO INVEST IN PLAYER DEVELOPMENT PROGRAMMES (IF FEES INCREASED)

While compared with All Sports 2017/18, hockey respondents are significantly more likely to want their club to invest in *quality of coaching or instructors* (17% cf. 11%) or *quality of officiating* (13% cf. 5%) if membership fees increased.

The focus for parents is more likely to be player development programmes (36% cf. 17% players), along with the quality of coaching (22% cf. 14%).

Conversely, *officiating* is a main focus for players (17% cf. 4% for parents).



Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=1756)

Q14. If your/ your child's hockey 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?

WHAT SHOULD BE INVESTED IN OR IMPROVED?

Apart from the one training session a week, there are no other opportunities to improve skills, maybe a holiday programme for hockey in Auckland would be a good idea (like the netball and soccer ones).

Parent of player, 8-10 years, Auckland

Having a development program for players that aren't just in the top squad. Currently the only players that are getting any development are the top players. Doesn't make any sense if you want to improve the club.

Player, 20-24 years, Canterbury

Coaches are always player coaches and under supported, they are asked to do everything often. The Association can do more to assist with systems and administration that makes this easier for the teams to just be coached. There are too many clubs duplicating up on this admin and not being focussed on delivering a quality product - the game.

Player, 30-34 Years, Waikato

Actual training and assessment of umpires. Too many umpires are players from same division with personal conflicts. No assessment means these personal conflicts go unchecked.

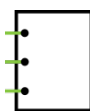
Player, 50-54 years, Waikato

More referees available (as opposed to our coaches having to scramble to get people to ref the games).

Player, 20-24 years, Auckland



PLAYER DEVELOPMENT PROGRAMMES



QUALITY OF COACHING



QUALITY OF OFFICIATING

Skilled specialists working with selected individuals who show promise. We have many players who could take their game to the next level but we do not have access on a regular basis to high performance coaches to develop the players to the next level, which they would get if they lived in a main centre e.g. Christchurch.

Player & parent, 45-49 years, Otago

Perhaps have an extended extra training session with a professional once or twice during the season.

Parent of player, 11-12 years, Manawatu

More coaches who were actively engaged with the children e.g., being able to show and demonstrate the skill they want the children to do, not just tell them. Some young coaches were great, others needed more guidance.

Parent of player, 5-7 years, Canterbury

At the junior levels coaches are predominantly parents, who don't get to receive much coaching help prior to the season and don't have a good set of plans or drills. It can seem to be quite chaotic to start with.

Parent of player, 8-10 years, Auckland

Recruiting more club players to be official umpires. Not asking club players at the last minute to fill in because the Association is too short to appoint umpires. Requiring each team to nominate at least one player to be trained as an umpire and to be included in the pool of umpires to be appointed by the Association every weekend. This could be incentivised by having a discount on fees.

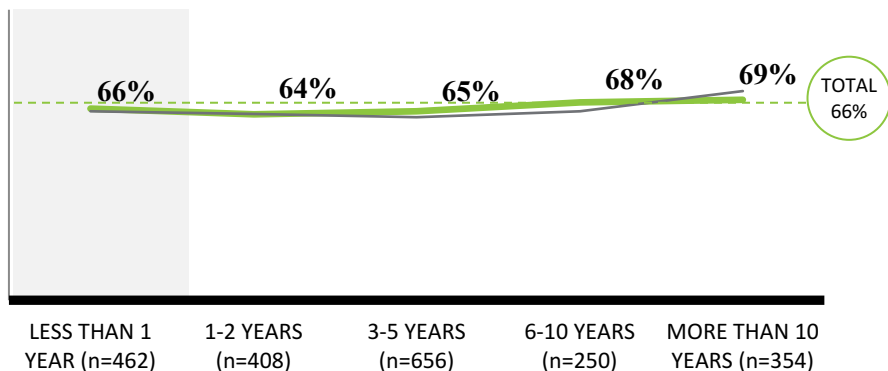
Player & parent, 50-54 years, Auckland

LENGTH OF MEMBERSHIP & THE JOINING PROCESS

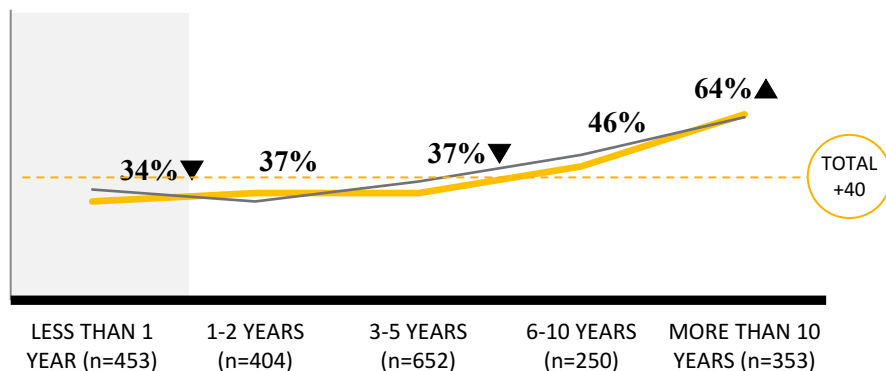
KEY METRICS: LENGTH OF MEMBERSHIP

Results over membership tenure are similar to 2017. That is, results are consistent with a slight dip from members of 1-2 years before increasing to the highest results among members of more than 10 years. The exceptions are value for money which drops as tenure increases, before increasing among the those who have been members for more than 10 years and NPS which continues to rise from a low of +34 among new members.

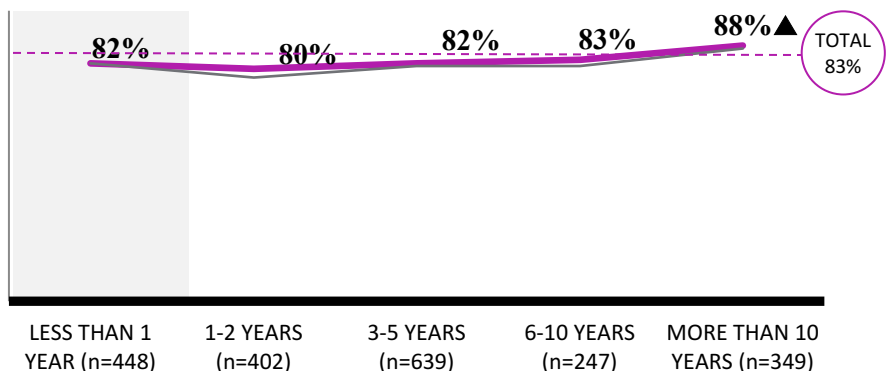
OVERALL SATISFACTION



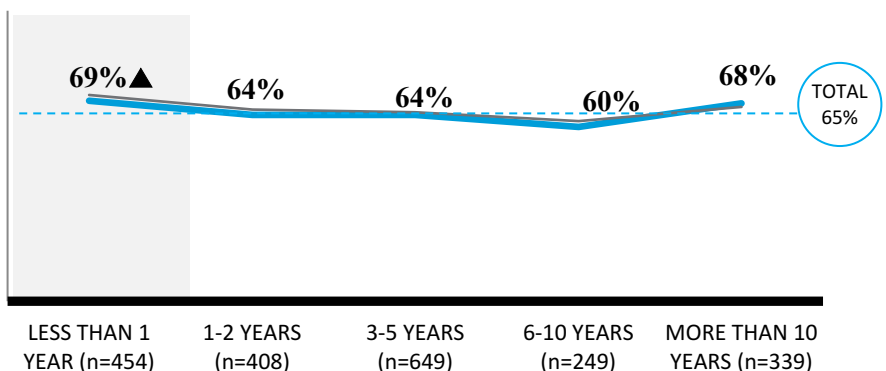
NPS



LIKELIHOOD TO REJOIN



VALUE FOR MONEY



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

Q6 / Q7 / Q9 / Q11

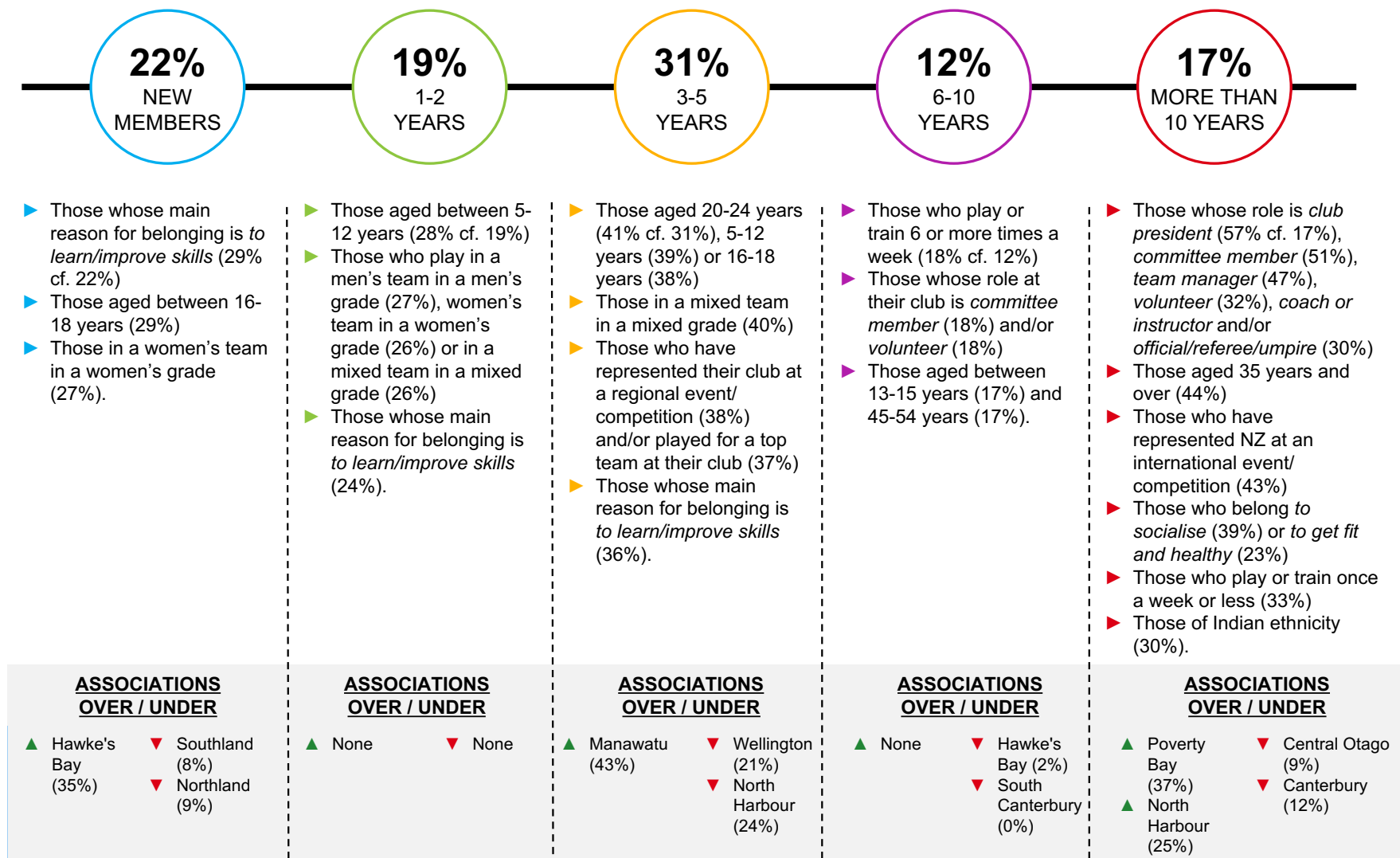
Note: The grey lines represent 2017 results

▲▼ Significantly higher/lower than Total Hockey 2018

▲▼ Significantly higher/lower than Total Hockey 2017

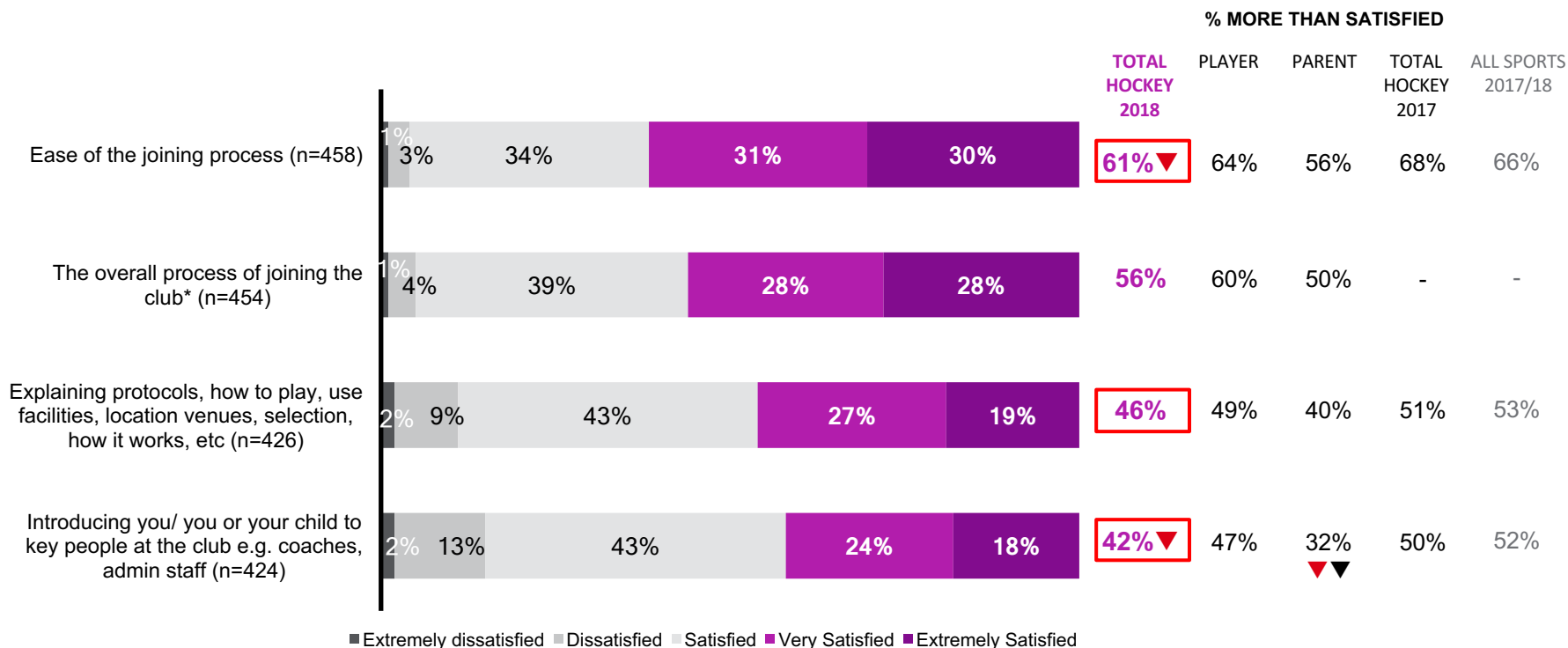
DIFFERENCE IN LENGTH OF MEMBERSHIP

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



OVER HALF ARE SATISFIED WITH THE PROCESS OF JOINING THEIR CLUB

New members (those who have belonged to their club for less than a year), make up a fifth of respondents (22%). When asked about the individual aspects of what they went through when they joined their club, more than half are more than satisfied with the overall process. Parents are significantly less likely to be more than satisfied with *introducing you or your child to key people at the club* (32% cf. 47% of players). Compared with 2017, hockey respondents rated two of the aspects significantly lower – *introducing you to key people at the club* (42% cf. 50%) and *ease of the joining process* (61% cf. 68%). In addition, hockey scores significantly lower than All Sports 2017/18 on three of the four joining aspects.



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 hockey club. How satisfied are you with your/ their hockey club on the following...

*New statement added in 2018

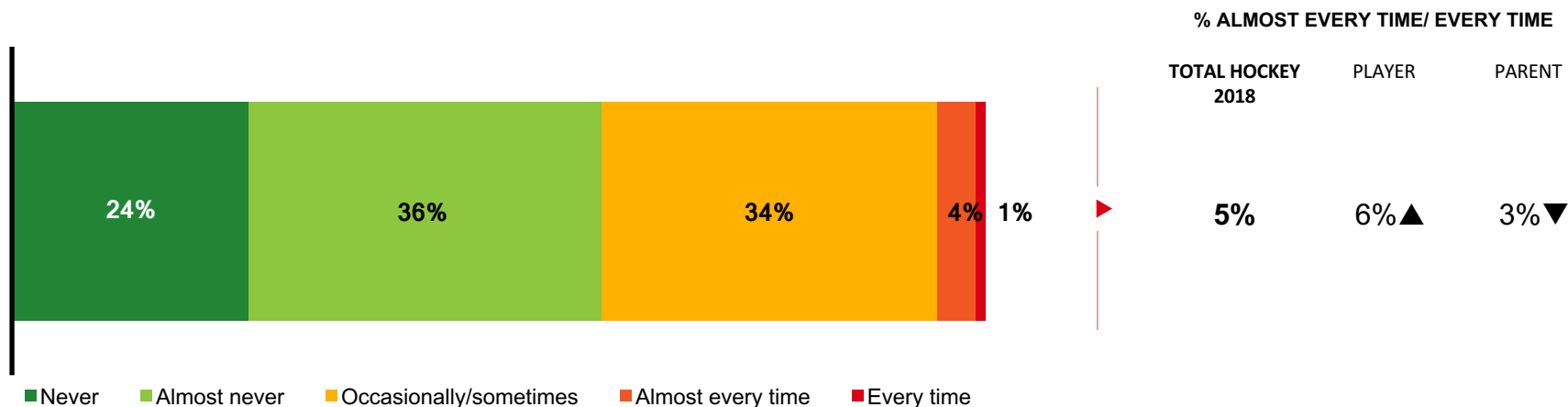
▲▼ Significantly higher/lower than Total Hockey 2018
▲▼ Significantly higher/lower than Total Hockey 2017
□ / □ Significantly higher/lower than All Sports 2017/18

SIDELINE BEHAVIOUR & CLUB ENVIRONMENT

FREQUENCY OF INAPPROPRIATE SIDELINE BEHAVIOUR

Two in five (39%) respondents have witnessed or experienced inappropriate behaviour by a spectator, coach or official at least occasionally while they or their child played in the last 12 months. This result is lower than other winter sports in 2018 (average of 47%).

Five percent have witnessed or experienced inappropriate behaviour almost every time or every time - which can impact retention, i.e. those who experience inappropriate sideline behaviour with this frequency are significantly more likely to indicate they are unlikely or very unlikely to rejoin their club next season (25% cf. 9%).



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

- ▶ Dissatisfied with their experience of playing hockey for their club (17% cf. 5%)
- ▶ Those who do not perceive they are getting value for money (15%)
- ▶ Those whose role at the club is *official/referee/umpire* (14%) and/or *committee member* (11%)
- ▶ Those of Pasifika (12%) or other ethnicity (11%)
- ▶ Those who play or train 6 or more times a week (10%).

Those **significantly more** likely to have **almost never or never** witnessed/experienced inappropriate behaviour are:

- ▶ Those from Central Otago (85% cf. 61%) or South Canterbury (77%) hockey associations
- ▶ Those who are new members at their club (71%)
- ▶ Those whose main reason for belonging is *to learn/improve skills* (69%)
- ▶ Those aged between 5-18 years (68%)
- ▶ Those who have represented their club at a regional event/competition (67%)
- ▶ Those who are more than satisfied with their experience of playing hockey for their club (67%)
- ▶ Those who perceive they are getting value for money (66%).

Base: All respondents (Excluding Don't know/not applicable) (n=2250)

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

Note: New question in 2018

OVER HALF OF RESPONDENTS FEEL THE UMPIRE IS RESPONSIBLE FOR ADDRESSING INAPPROPRIATE BEHAVIOUR

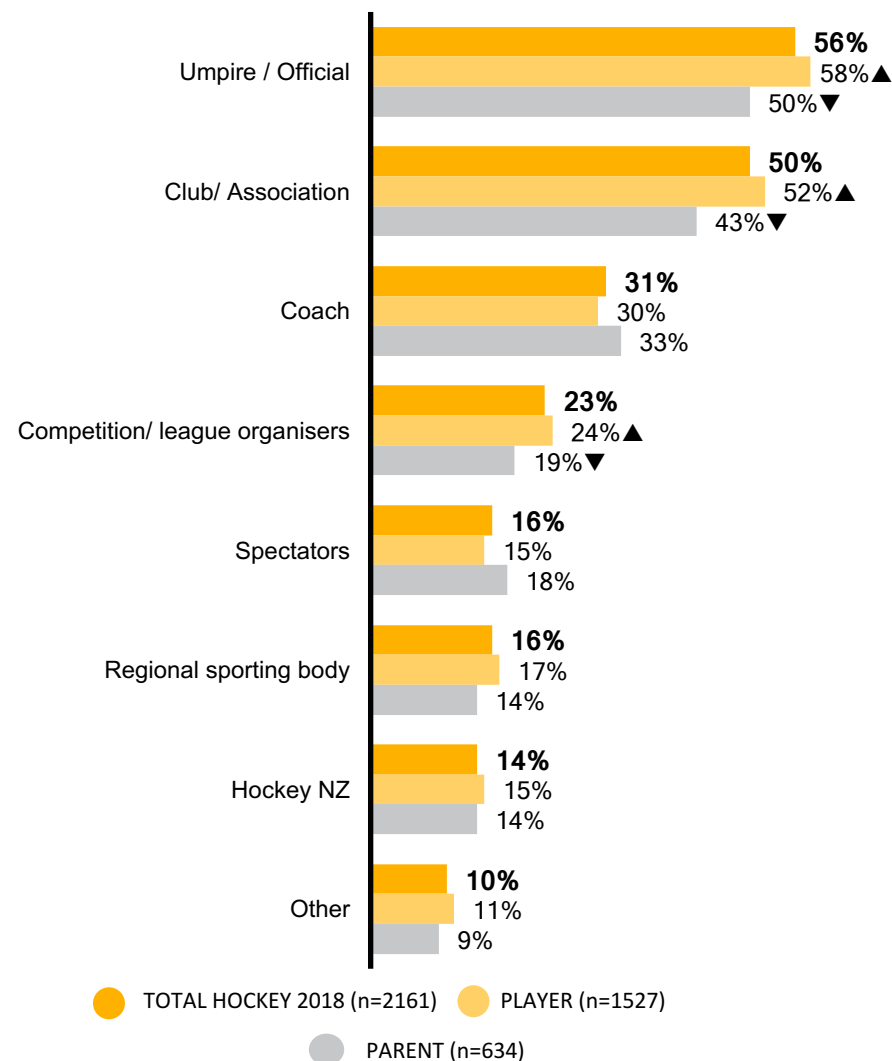
More than half of respondents (56%) think it's the responsibility of the *umpire/official* for addressing inappropriate behaviour during a match, followed by the *club/ association* (50%) – both of which players are significantly more likely to agree with.

One in seven respondents (14%) feel that it is the job of Hockey New Zealand to address inappropriate behaviour.

Typically, respondents feel the responsibility for addressing inappropriate behaviour lies with multiple roles/organisations (2.2 on average).

Those **significantly more** likely to think the *umpire/official* is responsible for addressing inappropriate behaviour are:

- ▶ Those whose main reason for belonging is *to get fit and healthy* (69%)
- ▶ Those from Wellington (65%) or North Harbour (63%) hockey associations
- ▶ Those aged 19-34 years (64%) or 35-44 years (63%)
- ▶ Those whose role at the club is *official/ referee/ umpire* (63%)
- ▶ Those who have been a member of their club for less than a year (62%).

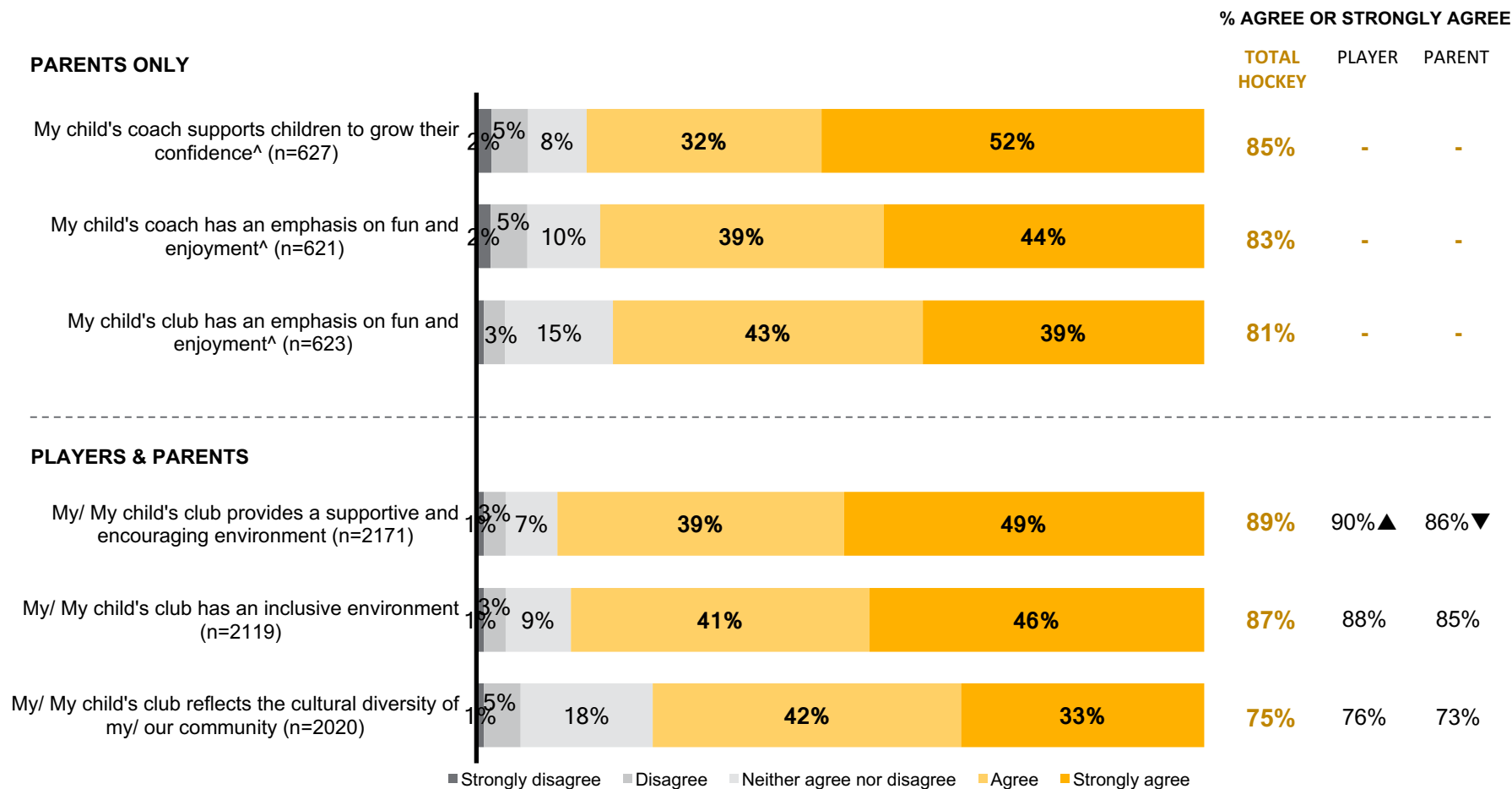


▲▼ Significantly higher/lower than Total Hockey 2018 35

CLUB ENVIRONMENT

More than eight in ten parents *agree* or *strongly agree* that their child's club and coach has an emphasis on fun and enjoyment and their child's coach supports children to grow their confidence.

A similar proportion feel their club has a supportive and encouraging environment, cultural diversity reflects the community and that the club has an inclusive environment (results range from 75% to 89% *agree* or *strongly agree*).



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

Note: New question in 2018; ^ Only asked of parents of children playing hockey

WHY RESPONDENTS DISAGREE WITH...

Emphasis probably more on development & improving skills - which leads to fun and enjoyment.

Parent of player, 14 years, Hawke's Bay

Seems to be more about winning, no social activities such as team bonding.

Parent of player, 13 years, Auckland

I think some of the coaches are too young and are focused on winning instead of encouraging children. Have witnessed some comments that are not encouraging for young children.

Parent of player, 11-12 years, Auckland

The majority of kids play for enjoyment, but the coach is very competitive, so this can take the fun out of it for the kids.

Parent of player, 11-12 years, Canterbury

I have encouraged my daughter through the season to believe in herself but this does wear thin when every game the coach shouts at the players what and where they should be and confuses them with her snap directions on the side line, instead of encouraging them. I understand that coaches don't get paid and it is their time they are giving up but at the same time if the quality of coaching is poor the loss of good players to the game is very sad.

Parent of player, 11-12 years, Canterbury

My child's club has an emphasis on fun and enjoyment

My child's coach has an emphasis on fun and enjoyment

My child's coach supports children to grow their confidence

The school team does not have an emphasis on fun because they are trying to be serious and make us win games. the same is said for the coaches and the school wants everyone to win or they do not receive support from the school.

Parent of player, 14 years, Waikato

The emphasis is on developing skills/improving - my child is 14 and playing for the top team for his age group at school so I feel that is as it should be. They are having fun at the same time because they are with their mates doing something they love but that isn't the aim of the training.

Parent of player, 14 years, Auckland

The coach's comments can be quite harsh at times and hurtful at times and needs to remember that they are just kids and at practice it's ok to have fun.

Parent of player, 11-12 years, Canterbury

My child's confidence has dropped significantly since an injury to a team mate he caused. Rather than supporting him to move on from the event, he has instead been pushed into the background, ridiculed by team mates and removed from his natural position and from areas of the game that are his strengths to the point where he no longer wants to play.

Parent of player, 11-12 years, Northland

WHY RESPONDENTS DISAGREE WITH...

Lack of professionalism. Our coach is a great person but has very little if no support from the club. Lack of skills development and driving to set kids up for reps etc.
Parent of player, 14 years, Canterbury

We do not have clubrooms, we don't know who our committee are personally so don't have contact with them unless via website or Facebook.
Player, 50-54 years, Auckland

Based on the local make up of our region, the community is not represented in our club or region. Other sports are more attractive to the community, whether it be family interest, the national sport or cost of participation.
Player & parent, 35-39 years, Northland

I live in an area with lots of different cultures and there is only one person on my team who is not a white European.
Player, 15 years, Auckland

Club has made no effort to include new players - it always feels very stand offish. I do not know anyone outside of my team.
Player, 25-29 years, Auckland

Players are treated based on who they know on committee rather than on skill. Players make teams without even trialing.
Player, 16 years, Canterbury

Club provides a supportive and encouraging environment

Club reflects the cultural diversity of my/our community

Club has an inclusive environment

The only time my club has contacted me has been to follow up on payment (which was incorrect). I have never had communications from the club to welcome me to the club, I wouldn't even know anyone other than the coach.
Parent of player, 11-12 years, Canterbury

Only the top team is encouraged and supported. The other teams have to find everything themselves even if no one has played before.
Parent of player, 14 years, Wellington-Wairarapa

I don't feel that new people to our community are encouraged to join and hence the children are all parents of hockey players. It would be nice to engage some other cultures in the club.
Parent of player, 5-7 years, Otago

I am a older member playing amongst mostly younger varied players, I either have to accept the way the culture is in the club or not play. I have asked that communication is done on important matters over a phone call as I am not great at text messaging etc. and have been ignored and at times ridiculed for this.
Parent & Player, 45-49 years, Canterbury

Base: All respondents who disagree/strongly disagree in Q54 (n=73-135)

Q55. You mentioned you disagree or strongly disagree with the following. What makes you say this or why is it you feel this way?

Note: New question in 2018

COMPETITION STRUCTURE

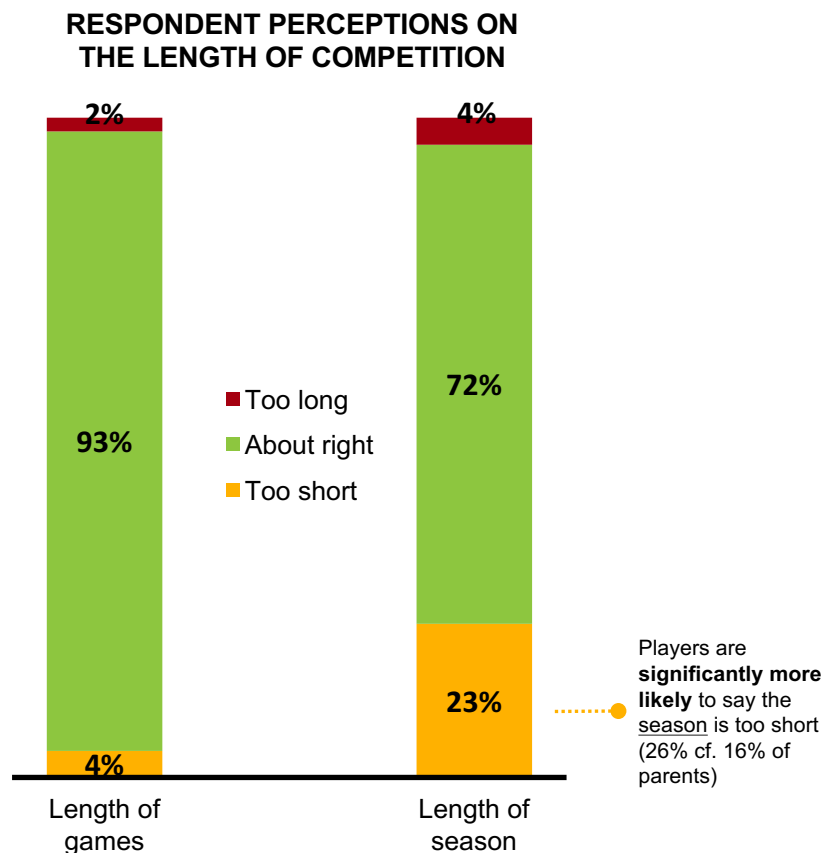
LENGTH OF THE GAME AND THE SEASON

More than nine in ten (93%) respondents feel that the length of the games is about right – 4% feel that the games are too short and only 2% too long.

Seven in ten (72%) feel that the length of the hockey season is about right, while one in five (23%) feel it is too short and 4% feel it is too long.

Those **significantly more** likely to think the hockey season is too short are:

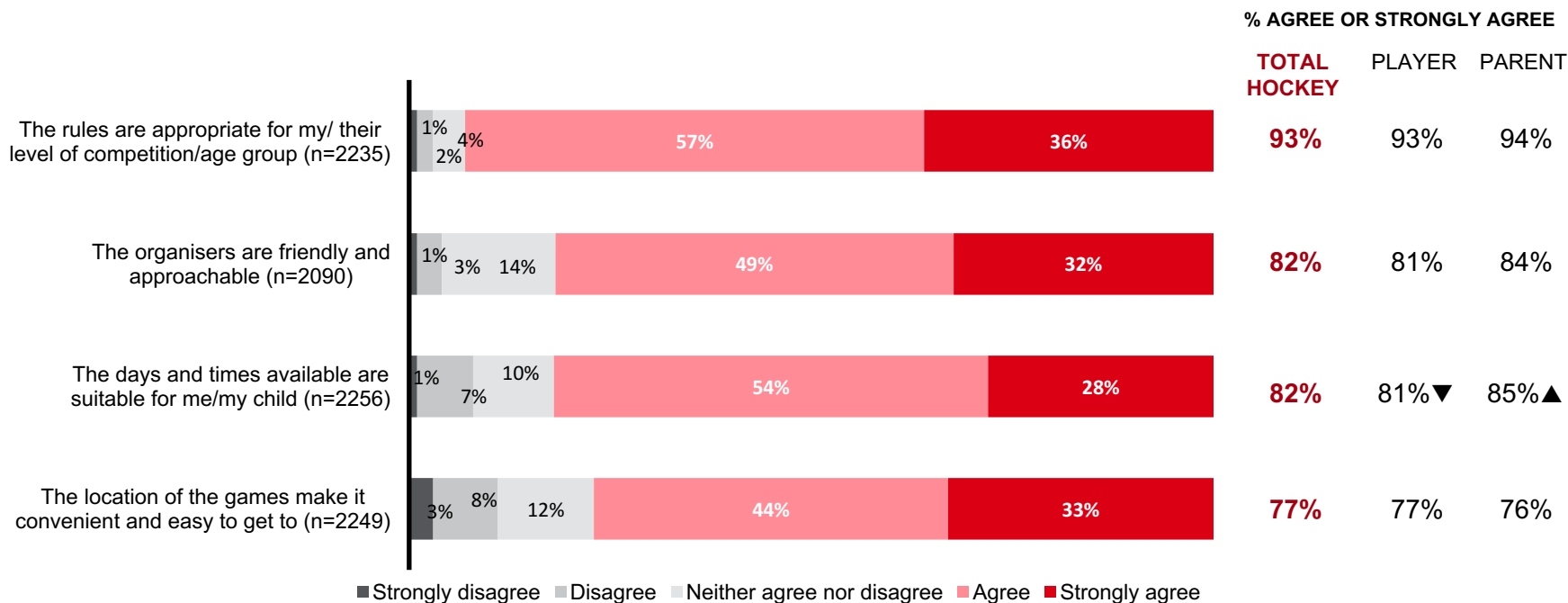
- ▶ Those from Otago (41%) or Auckland (30%) hockey associations
- ▶ Those aged 16-18 years (33%) and 19-24 years (33%).



COMPETITION STRUCTURE

Nine in ten (93%) respondents *agree or strongly agree* that *the rules are appropriate for my/their level or competition*. Around four in five (results ranging from 77% to 82%) *agree or strongly agree* with the three remaining statements - *the organisers are friendly and approachable, the days and times available are suitable for me/my child, the location of the games make it convenient and easy to get to*.

Parents are typically more enthused about *the days and times available are suitable for my child* (85% cf. 81% of players).



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

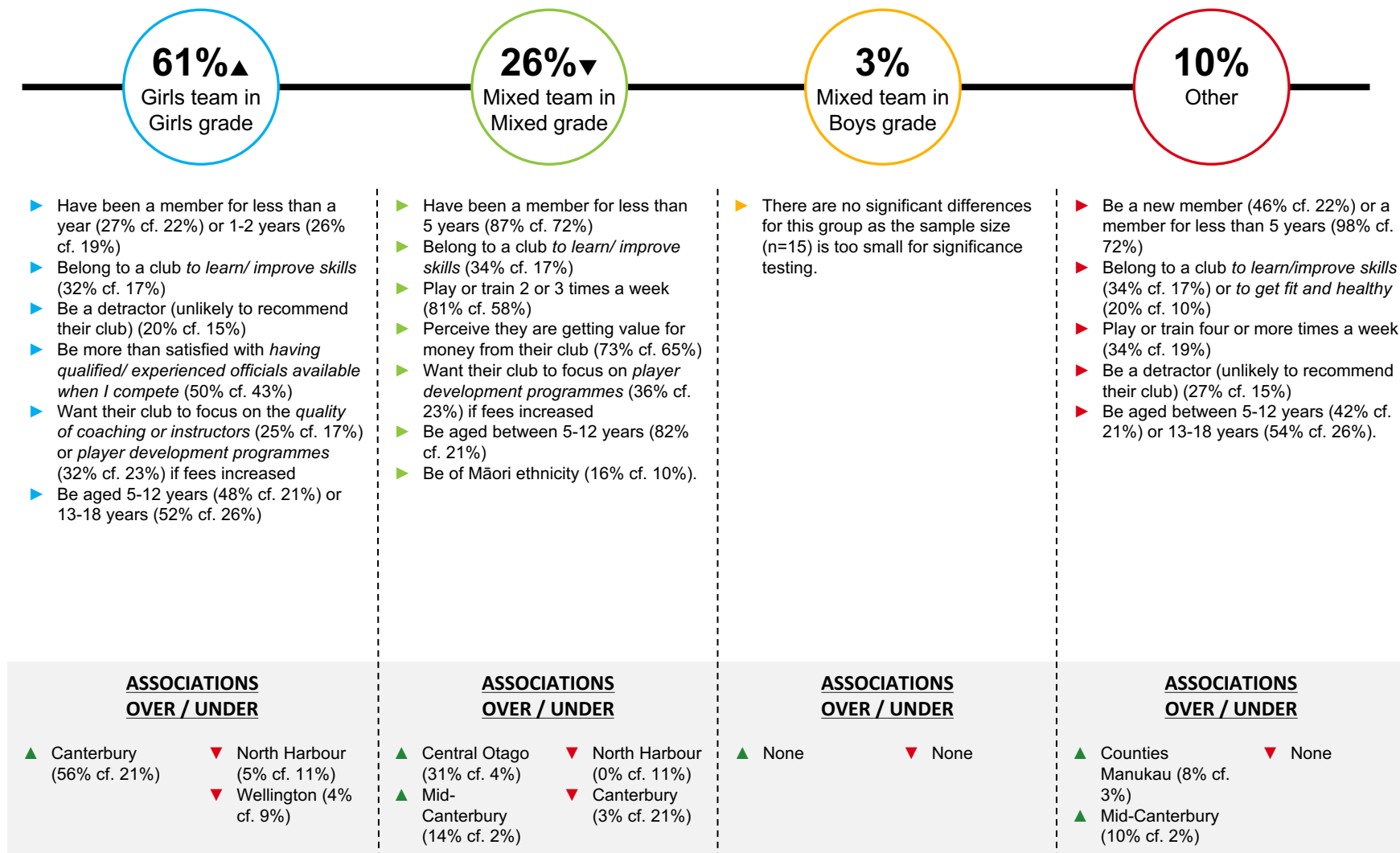
Q57. Still thinking about the league or competition you/they play in. To what extent do you agree or disagree on the following...

Note: New question in 2018; Question is asked from the parents' perspective

▲▼ Significantly higher/lower than Total Hockey 2018

TEAM MAKE UP - FEMALES

Those who are in the following team/grade composition are significantly more likely to:

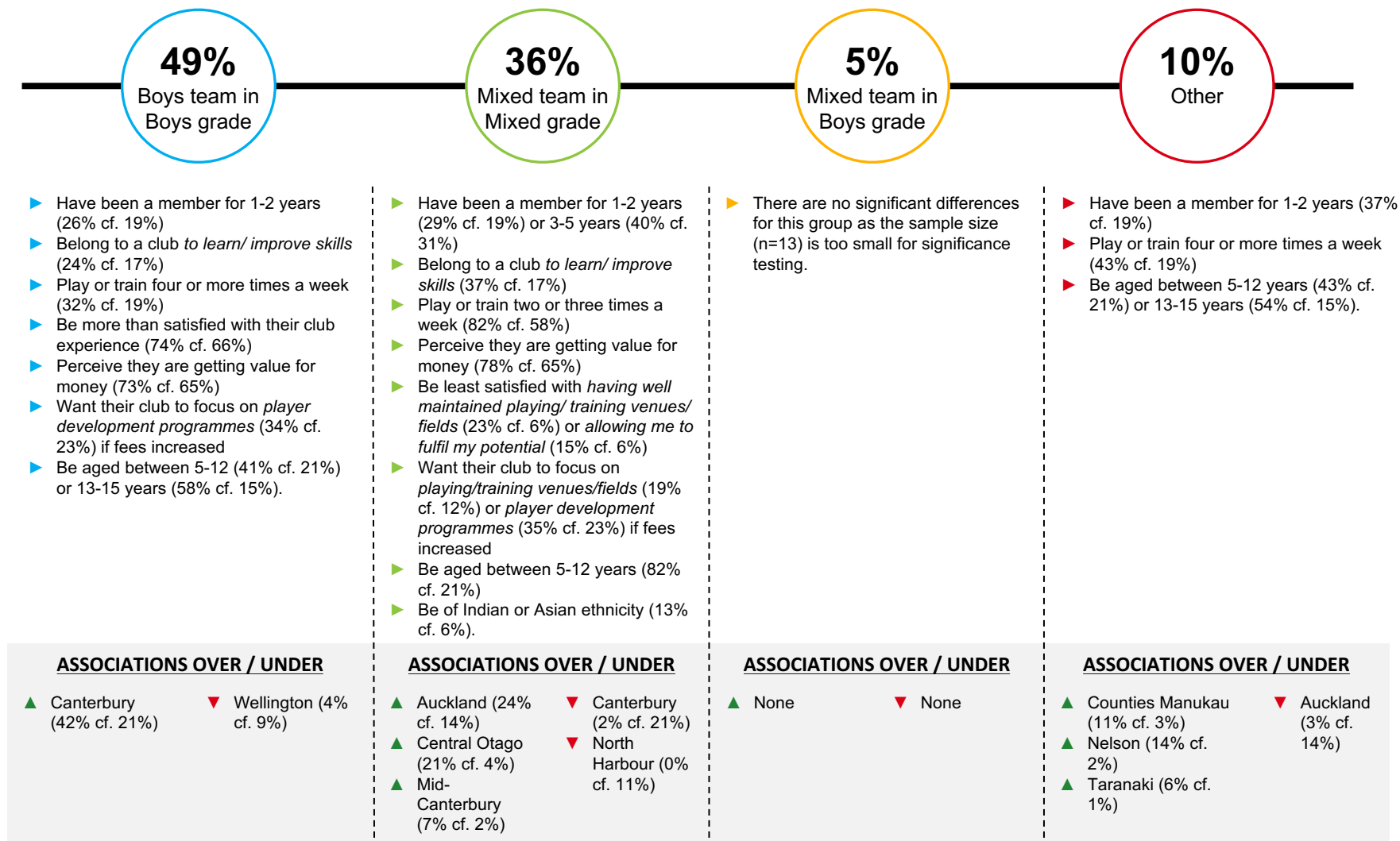


Base: All females under 16 (n=507)

Q60. Thinking about the team, grade or competition your child plays in. Which of the following best describes the team, grade or competition your child plays in?

TEAM MAKE UP - MALES

Those who are in the following team/grade composition are significantly more likely to:

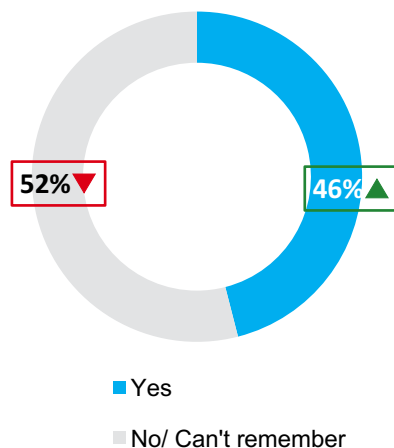


INJURY MANAGEMENT

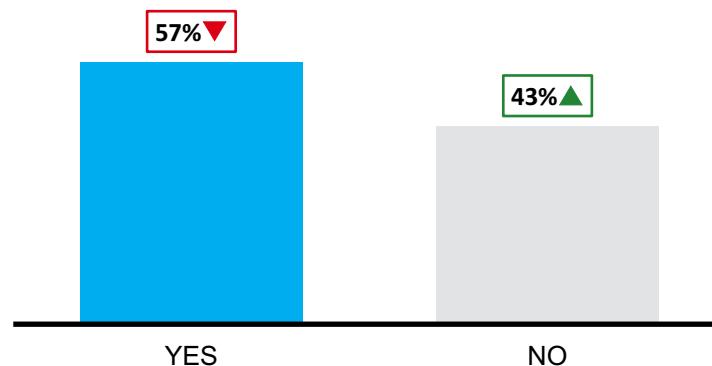
ALMOST HALF OF RESPONDENTS HAVE BEEN INJURED IN THE LAST 12 MONTHS

A higher proportion of respondents indicate they or their child has been injured while playing or training for hockey in the last 12 months (46% cf. 43%), and it remains significantly higher than the average for all sports in 2017/18 (27%). However, there is a lower proportion who made an ACC claim following this injury (57% cf. 68% in 2017) and compared with All Sports 2017/18 (63%).

INJURED IN THE LAST 12 MONTHS



MADE AN ACC CLAIM, FOLLOWING THE INJURY



Those **significantly more** likely to have been injured are:

- ▶ Those who play or train four or more times a week (56%)
- ▶ Those who belong *to socialise* (57%) or *to get fit and healthy* (53%)
- ▶ Young adults (19-34 years) (57%) or older adults (35+) (51%)
- ▶ Those who have played for a top team in their age group at their club or higher representative honours (51%)
- ▶ From Poverty Bay Hockey (65%), Waikato Hockey (60%), Hawke's Bay Hockey (59%), Hockey North Harbour (55%), or Wellington Hockey (54%).

Those **significantly less** likely to have been injured are:

- ▶ Primary/intermediate school age (5-12 years) (24%)
- ▶ Those who play or train once a week or less (39%)
- ▶ Those who belong *to learn/improve skills* (39%)
- ▶ From Mid Canterbury Hockey (26%), Central Otago Hockey (27%), Canterbury Hockey (38%).

Base: All respondents (n= 2276)

Q17. Have you been injured while playing or training for hockey in the last 12 months?

Base: All respondents who have been injured while playing or training (n=1043)

Q17a. Following the injury you/ your child sustained while playing or training for hockey, did you/ your child make an ACC claim?

▲▼ Significantly higher/lower than Total Hockey 2018

▲▼ Significantly higher/lower than Total Hockey 2017

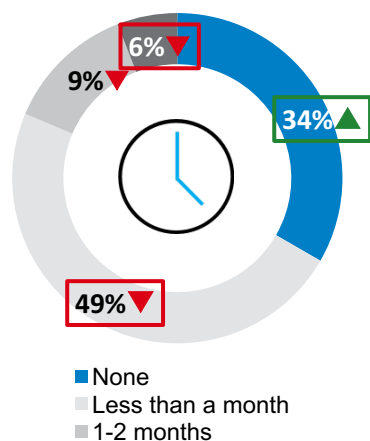
□ / □ Significantly higher/lower than All Sports 2017/18

FEWER LONG TERM INJURIES (GREATER THAN A MONTH)

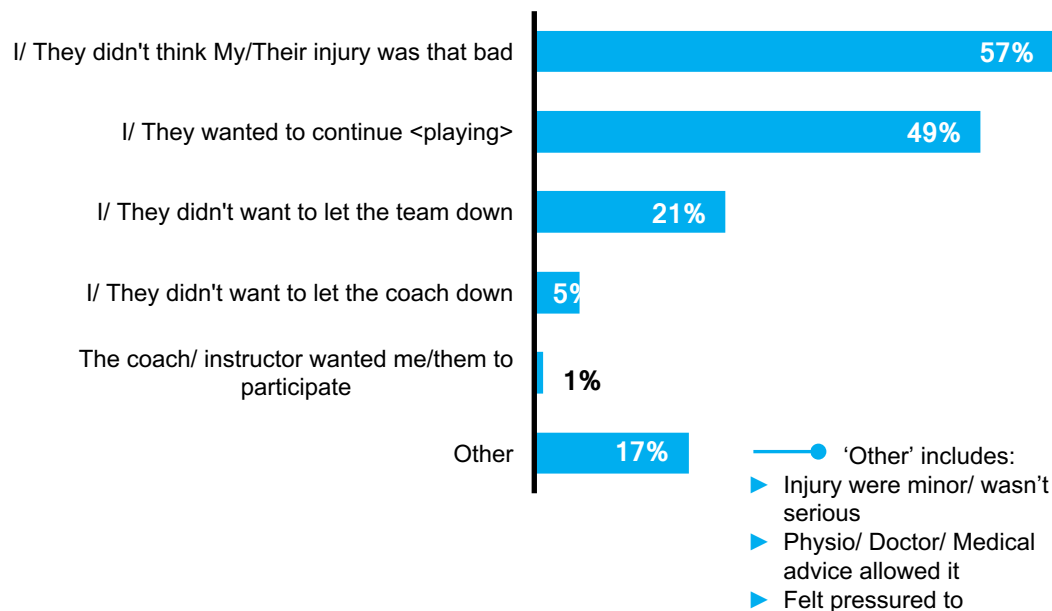
Of those who have been injured, 34% did not miss any time and they continued to play (a significant increase on the 2017 result of 22% and All Sports 2017/18 result of 20%). Of those who did continue to play, 57% indicating that *they wanted to continue playing* and 49% indicating *I/they didn't think my/their injury was that bad*.

There is also a smaller proportion who have missed at least a month due to injury (16% cf. 19%).

TIME MISSED DUE TO INJURY



WHY DID THEY CONTINUE TO PLAY WHILE INJURED



Base: All respondents who have been injured in the last 12 months (n=1043)

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=354)

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

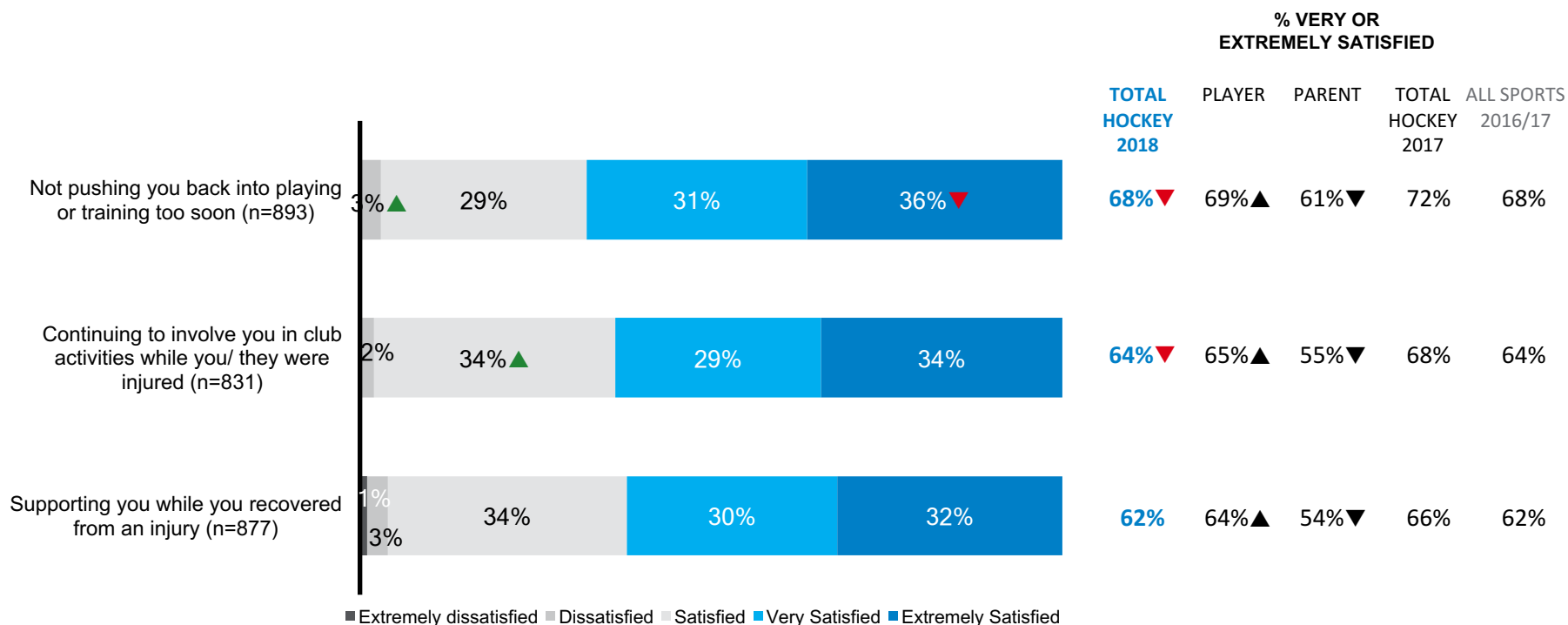
▲▼ Significantly higher/lower than Total Hockey 2018

▲▼ Significantly higher/lower than Total Hockey 2017

□ / □ Significantly higher/lower than All Sports 2017/18

INJURY MANAGEMENT

Overall, hockey respondents are satisfied with the way their club manages injuries. However, compared with the 2017 results, fewer hockey respondents are more than satisfied with their club *not pushing you/ your child back into playing or training too soon* (68% cf. 72%) and *continuing to involve you in club activities while injured* (64% cf. 68%) – particularly among parents.



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

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

▲▼ Significantly higher/lower than Total Hockey 2018

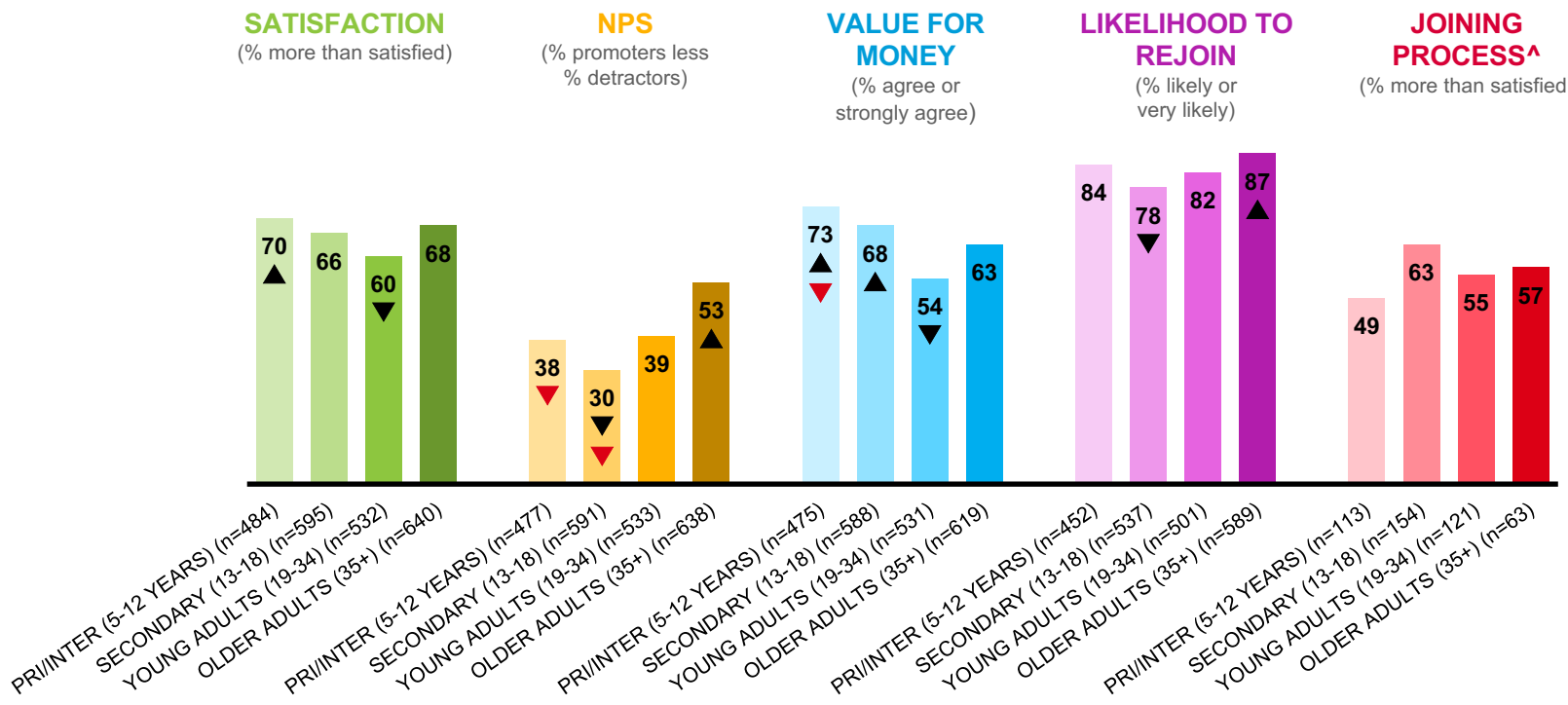
▲▼ Significantly higher/lower than Total Hockey 2017

□ / □ Significantly higher/lower than All Sports 2017/18

DEMOGRAPHIC DIFFERENCES

RESULTS ARE MIXED ACROSS AGE BRACKETS

Those of primary/intermediate age (5-12 years) are the most satisfied with their club experience and perceive better value for money (73%), yet have a lower rate of referral (NPS of +38). While those of secondary school age (13-18 years) are typically satisfied, they are least likely to recommend their club to someone interested in playing hockey (NPS of +30). Young adults (19-34 years) are significantly less likely to say they are more than satisfied with their club experience (60%) or feel they get value for money (54%). Older adults (35+) are fairly consistent in their results and are most likely to rejoin next season (87%) and recommend others to do so (NPS of +53).



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)

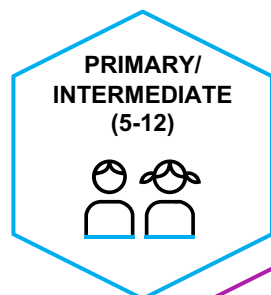
[^] please note change in metric in 2018 (previously average of four joining process attributes)

▲▼ Significantly higher/lower than Total Hockey 2018

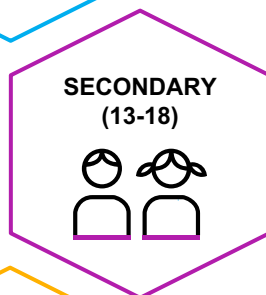
▲▼ Significantly higher/lower than Total Hockey 2017 49

KEY DIFFERENCES: AGE BRACKETS

Compared with the Total Hockey 2018 result, respondents in the following age brackets are significantly more likely to:



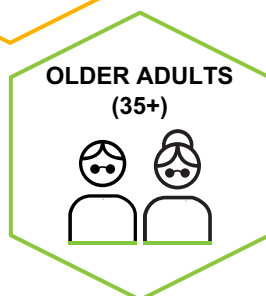
- ▶ Have been a member for 1-2 years (28% cf. average of 19%) or 3-5 years (39% cf. 31%)
- ▶ Indicate the main reason to belong to a club is *to learn/improve skills* (33% cf. 17%)
- ▶ Indicate the aspect they're least satisfied with is *the quality of the coaches or instructors* (15% cf. 10%)
- ▶ Want their club to invest in *player development programmes* (33% cf. 23%) or *quality of coaching* (23% cf. 17%) if fees increased
- ▶ Play or train two or three times a week on average (81% cf. 58%)
- ▶ Be more than satisfied with the secondary drivers:
 - ▶ *Having qualified / experienced officials available when I/ they compete* (52% cf. 43%)
 - ▶ *Communicating with you about the coaching, officiating and event opportunities and development provided by Hockey NZ* (52% cf. 47%)
- ▶ Have never witnessed or experienced inappropriate sideline behaviour (45% cf. 24%)
- ▶ Agree or strongly agree that *the days and times available are suitable for me/my child* (88% cf. 82%) (regarding the league/competition)
- ▶ Be from Canterbury Hockey (41% cf. 21%) or Central Otago Hockey (10% cf. 4%).



- ▶ Be a new member (less than a year) (28% cf. average of 22%)
- ▶ Be those whose main reason to belong to a club is *to play competitively* (44% cf. 36%) or *to learn/improve skills* (29% cf. 17%)
- ▶ Play or train four or more times a week on average (51% cf. 19%)
- ▶ Be those whose focus for improvement is *player development programmes* (33% cf. 23%)
- ▶ Be more than satisfied with the key driver *the social environment at the club* (71% cf. 64%)
- ▶ Play for the top team in their age group at their club or higher representative honours (62% cf. 47%)
- ▶ Be female (61% cf. 57%).



- ▶ Indicate the main reason to belong to a club is *to have fun* (34% cf. 26%)
- ▶ Play or train two or three times a week on average (68% cf. 58%)
- ▶ Indicate their least satisfied aspect is *having qualified / experienced officials* (24% cf. 19%)
- ▶ Be those who would want their club to invest in the *quality of officiating* (18% cf. 13%) if fees increased
- ▶ Have been injured in the last 12 months (57% cf. 46%).

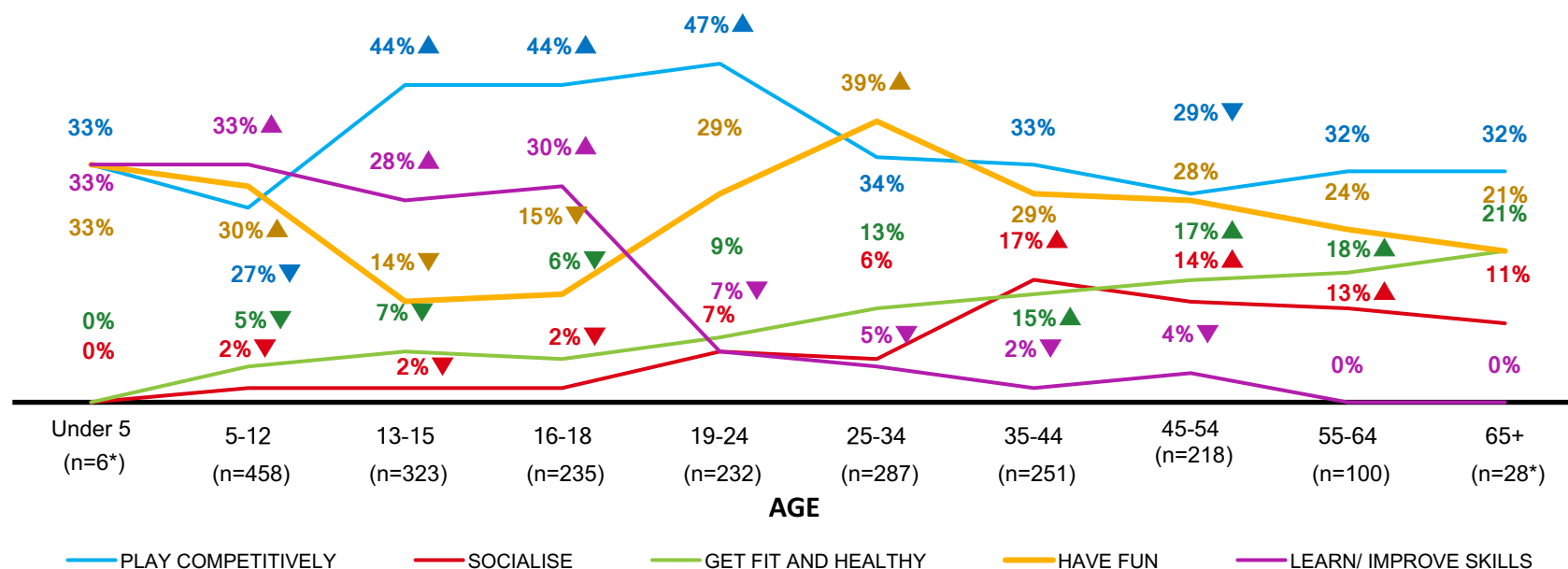


- ▶ Be a non-playing member (7% cf. average of 2%)
- ▶ Be a member for more than 10 years (44% cf. 17%)
- ▶ Play or train once a week or less on average (43% cf. 21%)
- ▶ Be those whose main reason to belong to a club is *to socialise* (15% cf. 7%) or *to get fit and healthy* (17% cf. 10%)
- ▶ Indicate their least satisfied aspect is *having qualified / experienced officials* (24% cf. 19%)
- ▶ Be those who would want their club to invest in the *quality of officiating* (18% cf. 13%) if fees increased
- ▶ Have been injured in the last 12 months (51% cf. 46%) and missed more time as a result (22% more than a month cf. average of 16%)
- ▶ Be male (49% cf. 42%).

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

For those under the age of thirteen, the main reasons for belonging are fairly evenly spread between *to have fun*, *to learn/improve skills*, and *to play competitively*. As they approach secondary school age, competition takes over as the predominant reason for belonging to a club, peaking between the ages of 19 and 24. From 25-34 years, competition drops and *to have fun* becomes the main reason for belonging. As age increases, motivations become more evenly distributed as the proportion who belong to *get fit & healthy* or *socialise* increases.

REASONS FOR BELONGING



Base: All respondents that are members (n=2138)

Q4. What is the main reason you/your child belong/belongs to a hockey club?

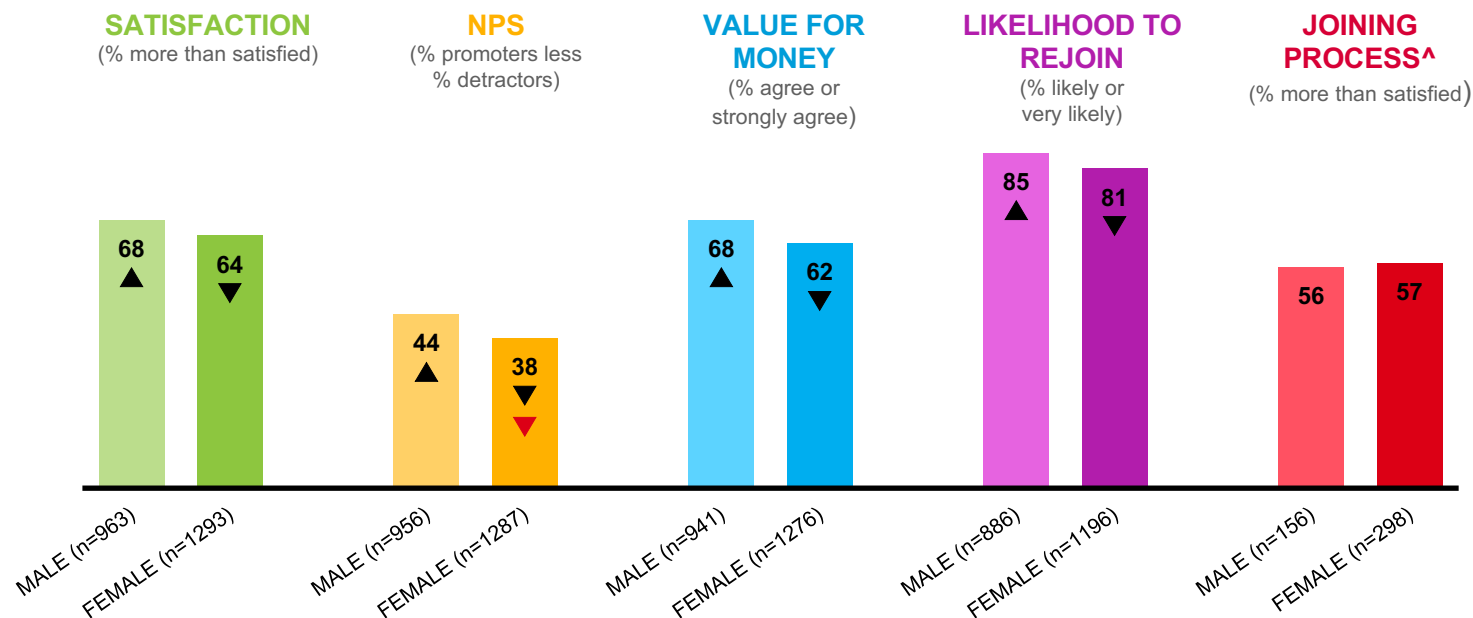
Q22. In which of the following age groups do/does you/your child belong?

* Small base size

▲▼ Significantly higher/lower than average for that reason for belonging

RATINGS AMONG MALE RESPONDENTS ARE SIGNIFICANTLY MORE POSITIVE THAN FEMALES

In particular, females are significantly less likely to be promoters of their club than in 2017, resulting in a significantly lower NPS score (+38 cf. +43 in 2017) and when compared with the male result (+44).



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)

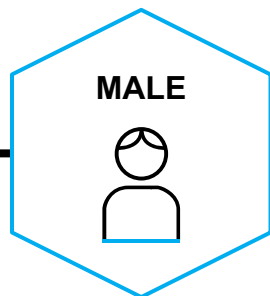
Q6 / Q7 / Q11 / Q9 / Q20

^ please note change in metric in 2018 (previously average of four joining process attributes)

▲▼ Significantly higher/lower than Total Hockey 2018

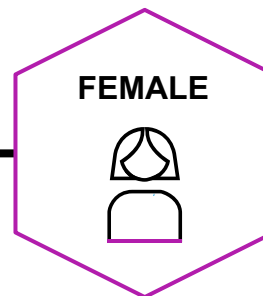
▲▼ Significantly higher/lower than Total Hockey 2017 52

KEY DIFFERENCES: GENDER



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

- ▶ Play or train once a week or less (24% cf. 18% of females)
- ▶ Be a long tenured member (more than 10 years) (20% cf. 14%)
- ▶ Be more than satisfied with the key drivers:
 - ▶ *Allowing me to fulfil my potential* (65% cf. 60%)
 - ▶ *Fair and equal opportunities* (71% cf. 63%)
- ▶ Be more than satisfied with the secondary drivers:
 - ▶ *Engaging with the local community* (54% cf. 48%)
- ▶ Indicate their least satisfied aspects is *having well maintained playing/ training venues/ fields* (9% cf. 4%)
- ▶ Be older adults (aged 35+) (33% cf. 25%).

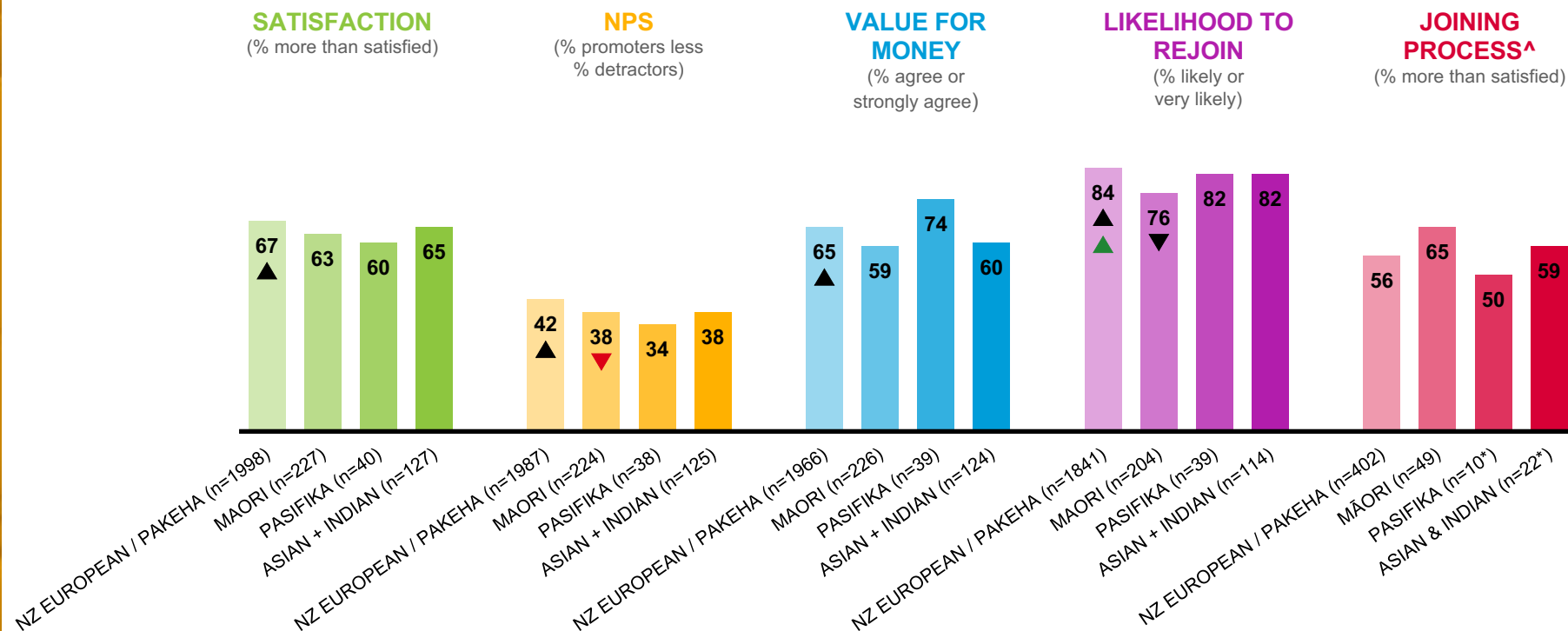


Female respondents are **significantly more likely than males** to:

- ▶ Be a new member (less than a year) (25% cf. 17% of males)
- ▶ Indicate the main reason for belonging to a club is to *learn/improve skills* (19% cf. 13%)
- ▶ Indicate their least satisfied aspect is that their club is *fair and provides equal opportunities for all players* (11% cf. 6%)
- ▶ Indicate they did not take any time off from playing hockey following their injury (38% cf. 28%)
- ▶ Be Māori (13% cf. 6%).

RESULTS ARE HIGHEST FOR THOSE OF EUROPEAN ETHNICITY

While the number of Pasifika respondents is relatively low, this demographic typically have lower results – 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

^ please note change in metric in 2018 (previously average of four joining process attributes)

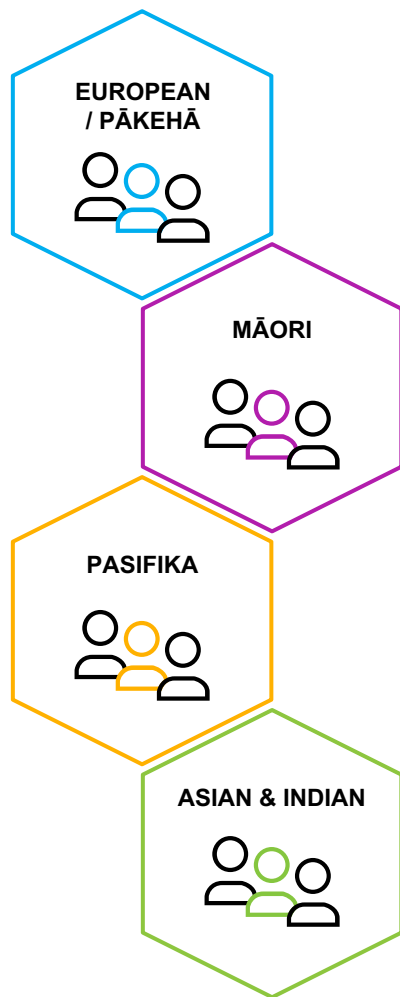
* Small base size

▲ ▼ Significantly higher/lower than Total Hockey 2018

▲ ▼ Significantly higher/lower than Total Hockey 2017

KEY DIFFERENCES: ETHNICITY

Compared with the Total Hockey 2018 result, respondents of the following ethnicities are significantly:



► Results are not statistically significant enough to report.

► **More likely to:**

- Play for the top team in their age group at their club or higher representative honours (55% cf. 47%)
- Be female (76% cf. 57%)
- Be from Poverty Bay Hockey (6% cf. 1%)

► **Less likely to:**

- Be more than satisfied with the key driver of *providing me the information I need when I need it* (60% cf. 67%) or the secondary drivers:
 - *Encouraging good sportsmanship and fair play* (67% cf. 73%)
 - *Fostering a sense of pride in the club* (61% cf. 67%)
 - *Communicating with you about the coaching, officiating and event opportunities and development provided by Hockey NZ* (39% cf. 47%)
- Agree/ strongly agree that *their/ their child's club has an inclusive environment* (81% cf. 87%)
- Agree/ strongly agree that *the organisers of their league/competition are friendly and approachable* (75% cf. 82%).

► **More likely to:**

- Indicate they witness or experience inappropriate sideline behaviour almost every time or every time (12% cf. 5%)
- Feel the length of the season is too long (15% cf. 4%)
- Be of primary/intermediate school age (5-12 years) (44% cf. 21%)
- Be from Auckland Hockey (39% cf. 14%)

► **Less likely to** be more than satisfied with the secondary driver of *encouraging good sportsmanship and fair play* (59% cf. 73%).

► **More likely to:**

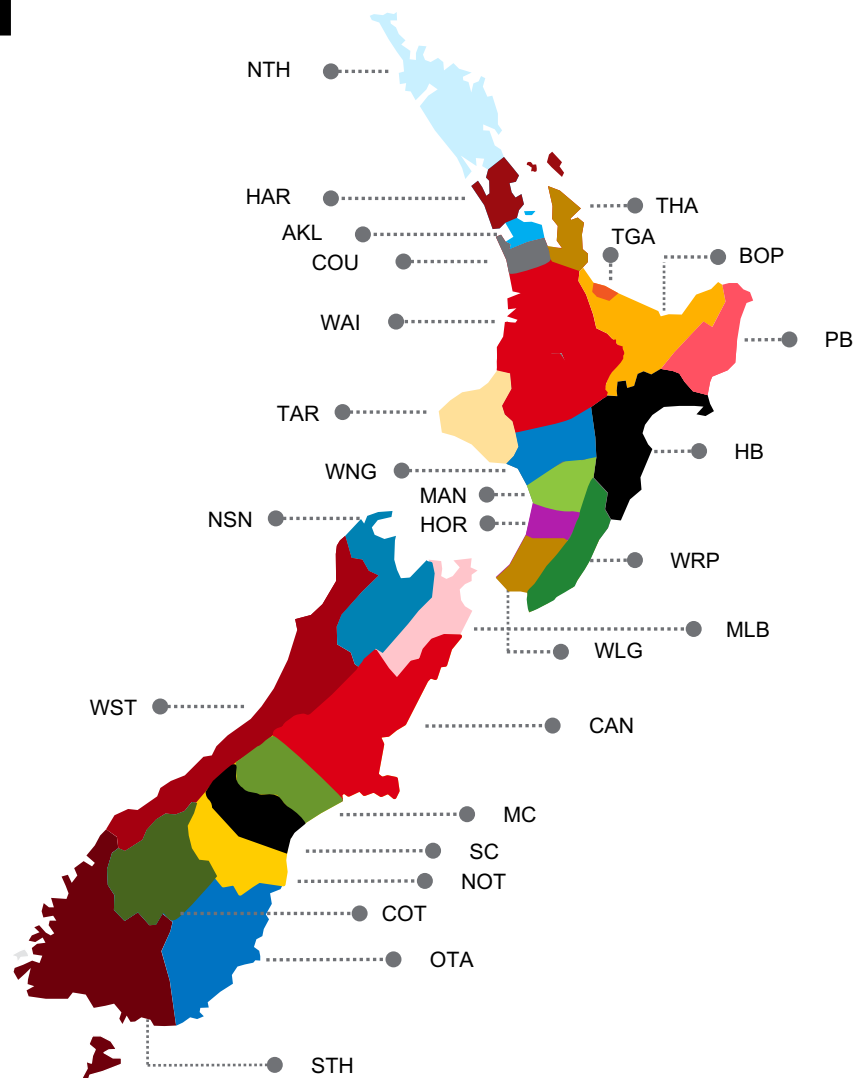
- Indicate they are least satisfied with the club *being professional and well managed* (13% cf. 4%)
- Indicate their/ their child's club *reflects the cultural diversity of their community* (87% cf. 75%)
- Be male (62% cf. 42%)
- Be from Auckland Hockey (41% cf. 14%)

► **Less likely to** agree/ strongly agree that *their child's coach supports children to grow their confidence* (69% cf. 85%).

REGIONAL HOCKEY ASSOCIATIONS

A MAP OF ASSOCIATIONS

ASSOCIATION	ABBREVIATION
Northland	NTH
North Harbour	HAR
Auckland	AKL
Counties Manukau	COU
Waikato	WAI
Thames Valley	THA
Tauranga	TGA
Bay of Plenty	BOP
Poverty Bay	PB
Hawke's Bay	HB
Taranaki	TAR
Manawatu	MAN
Whanganui	WNG
Horowhenua	HOR
Wairarapa	WRP
Wellington	WLG
Marlborough	MLB
Nelson	NSN
West Coast	WST
Canterbury	CAN
Mid Canterbury	MC
South Canterbury	SC
North Otago	NOT
Central Otago	COT
Otago	OTA
Southland	STH



POVERTY BAY RESPONDENTS ARE MOST SATISFIED

OVERALL SATISFACTION

(% more than satisfied)

TOTAL HOCKEY 2018

66%

Nationally, there is a large variation in overall satisfaction results with the proportion more than satisfied ranging from 36% for North Otago Hockey to 84% among those from Poverty Bay Hockey.

North Harbour and Canterbury are two associations that also have a significantly higher proportion of respondents who are more than satisfied with the overall experience at their club. Although sample sizes are relatively small, West Coast Hockey and Marlborough Hockey have a high proportion who are also more than satisfied (greater than 80%, respectively).

Conversely, Hockey Northland and Nelson Hockey have significantly lower results (48% and 40%, respectively). Nelson Hockey also has the highest proportion of respondents who are dissatisfied or extremely dissatisfied with their overall hockey club experience (15% cf. total of 7%).

The most significant negative change from the 2017 result is Otago Hockey (64% cf. 77%).

ASSOCIATION	MORE THAN SATISFIED	DISSATISFIED/ EXTREMELY DISSATISFIED
Northland (n=46)	48%	9%
North Harbour (n=241)	73%	5%
Auckland (n=325)	65%	10%
Counties Manukau (n=62)	69%	10%
Waikato (n=70)	66%	9%
Thames Valley (n=5**)	60%	0%
Tauranga (n=50)	68%	2%
Bay of Plenty (n=27*)	56%	15%
Poverty Bay (n=31)	84%	6%
Hawke's Bay (n=53)	58%	6%
Taranaki (n=34)	68%	12%
Manawatu (n=79)	67%	6%
Whanganui (n=13*)	54%	8%
Horowhenua (n=4**)	50%	0%
Wairarapa (n=29*)	62%	3%
Wellington (n=204)	60%	7%
Marlborough (n=21*)	81%	0%
Nelson (n=55)	40%	15%
West Coast (n=11*)	82%	9%
Canterbury (n=475)	70%	7%
Mid Canterbury (n=53)	70%	6%
South Canterbury (n=35)	66%	9%
North Otago (n=11*)	36%	9%
Central Otago (n=93)	68%	4%
Otago (n=69)	64% ▼	6%
Southland (n=37)	65%	5%

Base: All respondents (Excluding Don't know/not applicable) (n=2259)

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

Note: Associations are based on the club the respondent selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

▲ ▼ Significantly higher/lower than Total Hockey 2017
 ■ / ■ Significantly higher/lower than Total Hockey 2018

RESPONDENTS FROM POVERTY BAY ARE ALSO MOST LIKELY TO RECOMMEND THEIR CLUB

NPS

(% promoters minus % detractors)

TOTAL HOCKEY 2018

+40

Two associations stand out when it comes to their respondents' likelihood to recommend their club – Poverty Bay and Southland. West Coast Hockey has the highest NPS result (+82) - although with a small sample size.

Those from Hockey Northland, Nelson Hockey and Manawatu Hockey are less enthusiastic.

- ▶ Northland and Manawatu have significantly lower NPS scores than in 2017 (+13 cf. +56 and +28 cf. +44, respectively)
- ▶ Nelson Hockey has a significantly higher proportion of detractors (29% cf. 15%).

Although the sample size is small, North Otago is the only association that has a negative NPS (-18).

ASSOCIATION	NPS	PROMOTERS	PASSIVES	DETRACTORS
Northland (n=46)	+13 ▼	37% ▼	39%	24% ▲
North Harbour (n=239)	+50	63%	24%	13%
Auckland (n=325)	+36	51%	34%	15%
Counties Manukau (n=61)	+48	59%	30%	11%
Waikato (n=70)	+39	54%	30%	16%
Thames Valley (n=5**)	+40	60%	20%	20%
Tauranga (n=50)	+46	54%	38%	8%
Bay of Plenty (n=25*)	+40	64%	12%	24%
Poverty Bay (n=30)	+70	80%	10%	10%
Hawke's Bay (n=53)	+47	58%	30%	11%
Taranaki (n=33)	+36	58%	21%	21%
Manawatu (n=80)	+28 ▼	46%	35%	19%
Whanganui (n=14*)	+29	50%	29%	21%
Horowhenua (n=4**)	+25	25%	75%	0%
Wairarapa (n=28*)	+39	46%	46%	7%
Wellington (n=206)	+42	55%	31%	14%
Marlborough (n=21*)	+57	67%	24%	10%
Nelson (n=55)	+22	51%	20%	29%
West Coast (n=11*)	+82	82%	18%	0%
Canterbury (n=476)	+40	54%	31%	14%
Mid Canterbury (n=53)	+38	49%	40%	11%
South Canterbury (n=34)	+38	53%	32%	15%
North Otago (n=11*)	-18	27%	27%	45%
Central Otago (n=91)	+53	65%	23%	12%
Otago (n=69)	+46	58%	30%	12%
Southland (n=36)	+64	67%	31%	3%

Base: All respondents (Excluding Don't know/not applicable) (n=2247)

Q7. Imagine someone is interested in playing or participating in hockey. 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?

* Promoters = score of 9 or 10, Passive = score of 7 or 8, Detractors = score of 0 to 6

Note: Associations are based on the club the respondent selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

▲ ▼ Significantly higher/lower than Total Hockey 2017
 ■ / ■ Significantly higher/lower than Total Hockey 2018

CENTRAL OTAGO RESPONDENTS INDICATE THE BEST VALUE FOR MONEY

VALUE FOR MONEY

(% agree or strongly agree)

TOTAL HOCKEY 2018

65%

There is little change across associations with respect to perceived value for money. Nelson Hockey respondents are least likely to indicate they feel the opportunities, services and benefits they receive from their club make it well worth the money they pay.

Respondents from Central Otago Hockey are significantly more likely to feel they get value for money. Four in five respondents from West Coast, Poverty Bay, Wairarapa, Thames Valley and South Canterbury Hockey perceive being a member of their hockey club offers value for money.

Respondents from Nelson (25%), Wellington (16%) and Auckland (15%) hockey associations are significantly more likely to *disagree or strongly disagree*. Although, samples sizes are small, around one in five respondents from Bay of Plenty, Northland and Counties Manukau also *disagree or strongly disagree*.

Regionally, there are no significant changes from the 2017 results.

ASSOCIATION	AGREE/ STRONGLY AGREE	DISAGREE / STRONGLY DISAGREE
Northland (n=47)	51%	19%
North Harbour (n=238)	67%	8%
Auckland (n=317)	62%	15%
Counties Manukau (n=62)	58%	18%
Waikato (n=67)	60%	12%
Thames Valley (n=5**)	80%	0%
Tauranga (n=49)	55%	10%
Bay of Plenty (n=27)	56%	22%
Poverty Bay (n=31)	81%	3%
Hawke's Bay (n=53)	74%	9%
Taranaki (n=33)	67%	15%
Manawatu (n=79)	68%	4%
Whanganui (n=13*)	62%	15%
Horowhenua (n=4**)	75%	0%
Wairarapa (n=27*)	81%	4%
Wellington (n=199)	59%	16%
Marlborough (n=21*)	71%	10%
Nelson (n=51)	51%	25%
West Coast (n=11*)	82%	0%
Canterbury (n=473)	66%	10%
Mid Canterbury (n=50)	64%	8%
South Canterbury (n=35)	80%	6%
North Otago (n=11*)	55%	9%
Central Otago (n=92)	79%	1%
Otago (n=69)	61%	10%
Southland (n=36)	64%	14%

* Small base size

** Very small base

▲ ▼ Significantly higher/lower than Total Hockey 2017
 ■ / ■ Significantly higher/lower than Total Hockey 2018

Base: All respondents (Excluding Don't know/not applicable) (n=2221)

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

Note: Associations are based on the club the respondent selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

REGIONALLY, THERE IS A HIGH INTENTION TO REJOIN

LIKELIHOOD TO REJOIN

(% likely or very likely)

TOTAL HOCKEY 2018

83%

Although sample sizes are small, all respondents from West Coast Hockey and Horowhenua Hockey indicate they are likely or very likely to rejoin next season.

Counties Manukau has the most positive change in result from 2017, with a significantly higher proportion of respondents indicating they intend to rejoin their club next season (92% cf. 76% in 2017).

As noted in the other key metrics, Hockey Northland Hockey has lower results comparatively (71% are more than likely to rejoin their club next season – a significantly lower result than the total of 83%).

One in five respondents from Hawke's Bay Hockey (20%) and Hockey Northland (19%) indicate they are *unlikely* or *very unlikely* to rejoin their club next season.

ASSOCIATION	LIKELY/ VERY LIKELY	UNLIKELY/ VERY UNLIKELY
Northland (n=42)	71%	19%
North Harbour (n=227)	86%	8%
Auckland (n=305)	81%	9%
Counties Manukau (n=59)	92%▲	8%
Waikato (n=65)	78%	12%
Thames Valley (n=5**)	60%	0%
Tauranga (n=43)	86%	5%
Bay of Plenty (n=23*)	74%	4%
Poverty Bay (n=30)	90%	3%
Hawke's Bay (n=46)	74%	20%
Taranaki (n=31)	77%	13%
Manawatu (n=73)	79%	14%
Whanganui (n=13*)	92%	0%
Horowhenua (n=4**)	100%	0%
Wairarapa (n=26*)	81%	15%
Wellington (n=187)	84%	6%
Marlborough (n=18*)	89%	6%
Nelson (n=48)	75%	17%
West Coast (n=11*)	100%	0%
Canterbury (n=447)	85%	6%▼
Mid Canterbury (n=52)	85%	12%
South Canterbury (n=34)	79%	12%
North Otago (n=9**)	67%	22%
Central Otago (n=91)	85%	11%
Otago (n=63)	84%	10%
Southland (n=35)	89%	0%

* Small base size

** Very small base

▲▼ Significantly higher/lower than Total Hockey 2017

■ / ■ Significantly higher/lower than Total Hockey 2018

Base: All respondents who are members (Excluding Don't know/not applicable) (n=2085)

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

Note: Associations are based on the club the respondent selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

A LARGE VARIATION IN SATISFACTION WITH THE JOINING PROCESS

JOINING PROCESS

(% more than satisfied)

With some associations with few new member respondents, there is a large variation in the level of satisfaction with the process they go through when they join their club.

Generally, respondents from Taranaki Hockey are most satisfied the overall process they went through when they joining their hockey club (73%), followed by Otago and Manawatu (both 60%).

TOTAL HOCKEY 2018

56%

ASSOCIATION	MORE THAN SATISFIED	DISSATISFIED/ EXTREMELY DISSATISFIED
Northland (n=3**)	33%	0%
North Harbour (n=49)	59%	8%
Auckland (n=54)	57%	2%
Counties Manukau (n=11*)	45%	0%
Waikato (n=18*)	50%	0%
Thames Valley (n=1**)	0%	0%
Tauranga (n=8**)	63%	13%
Bay of Plenty (n=2**)	100%	0%
Poverty Bay (n=5**)	80%	0%
Hawke's Bay (n=16*)	50%	6%
Taranaki (n=11*)	73%	9%
Manawatu (n=10*)	60%	10%
Whanganui (n=4**)	50%	0%
Horowhenua (n=0**)	-	-
Wairarapa (n=4**)	100%	0%
Wellington (n=49)	59%	4%
Marlborough (n=4**)	100%	0%
Nelson (n=9**)	22%	11%
West Coast (n=1**)	100%	0%
Canterbury (n=104)	54%	7%
Mid Canterbury (n=13*)	46%	0%
South Canterbury (n=7**)	57%	0%
North Otago (n=1**)	0%	0%
Central Otago (n=22)	50%	5%
Otago (n=20)	60%	0%
Southland (n=3**)	33%	0%

Base: All respondents who are members for less than one year (Excluding Don't know/not applicable) (n=454)
Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their hockey club. How satisfied are you with your/ their hockey club on the following...

Note: Associations are based on the club the respondent selected in the questionnaire at Q2a

Note: Due to the change in metric in 2018, comparisons cannot be made with results in 2017

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base



Significantly higher/lower than Total Hockey 2018

SATISFACTION KEY DRIVERS: NORTH ISLAND ASSOCIATIONS

ASSOCIATION	TOTAL	NTH	HAR	AKL	COU	WAI	THA	TGA	BOP	PB	HB	TAR	MAN	WNG	HOR	WRP	WLG
	n=	34-47	202-239	277-325	54-62	49-70	3-5**	41-50	25-27*	23*-31	40-54	21*-34	66-81	10-14*	4**	20-29*	154-206
Being friendly and welcoming	79%	61%	85%	78%	85%	83%	80%	76%	63%	90%	80%	85%	83%	50%	75%	83%	82%
Having well maintained playing/training venues/fields	69%	61%	73%	70%	77%	55%	20%	53%	74%	96%	73%	78%	68%	36%	75%	70%	68%
Providing information when needed	67%	48%	76%	60%	75%	65%	60%	64%	56%	94%	61%	71%	62%	43%	50%	79%	68%
Fair and provides equal opportunities	66%	57%	72%	63%	68%	65%	40%	73%	59%	87%	62%	79%	69%	50%	75%	79%	69%
Being professional and well managed	64%	50%	74%	60%	76%	61%	40%	63%	63%	84%	60%	63%	59%	29%	50%	70%	67%
The social environment at the club	64%	51%	76%	63%	68%	63%	80%	67%	56%	81%	68%	61%	67%	27%	25%	65%	59%
The quality of the coaches	63%	39%	70%	61%	58%	53%	33%	66%	54%	84%	52%	58%	67%	40%	100%	76%	58%
Allowing to fulfil potential	62%	48%	68%	59%	68%	58%	50%	65%	56%	87%	55%	68%	65%	54%	50%	81%	62%
Having clean and well maintained facilities	57%	56%	65%	52%	61%	61%	20%	39%	52%	74%	63%	52%	48%	27%	50%	70%	56%

Base: All respondents (Excluding Don't know/not applicable) (n= 1780-2262)

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

Note: Associations are based on the club the respondents selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

■ / ■ Significantly higher/lower than Total Hockey 2018 63

SATISFACTION WITH KEY DRIVERS: SOUTH ISLAND ASSOCIATIONS

ASSOCIATION	TOTAL	MLB	NSN	WST	CAN	MC	SC	NOT	COT	OTA	STH
	n=	20-21*	43-55	3**-11*	351-479	37-53	24*-35	8**-11*	81-94	50-68	29*-37
Being friendly and welcoming	79%	86%	63%	82%	79%	79%	71%	55%	76%	84%	95%
Having well maintained playing/ training venues/ fields	69%	81%	77%	71%	69%	63%	72%	70%	62%	76%	67%
Providing information when needed	67%	71%	50%	91%	67%	62%	74%	45%	70%	67%	70%
Fair and provides equal opportunities	66%	86%	48%	73%	65%	73%	54%	36%	62%	72%	75%
Being professional and well managed	64%	71%	44%	55%	67%	68%	66%	36%	59%	61%	73%
The social environment at the club	64%	76%	49%	80%	62%	64%	56%	55%	57%	78%	72%
The quality of the coaches	63%	67%	47%	70%	67%	65%	60%	50%	68%	60%	71%
Allowing to fulfil potential	62%	80%	49%	91%	62%	69%	57%	45%	55%	67%	72%
Having clean and well maintained facilities	57%	48%	72%	33%	56%	62%	46%	64%	68%	58%	41%

Base: All respondents (Excluding Don't know/not applicable) (n= 1780-2262)

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

Note: Associations are based on the club the respondents selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

SATISFACTION WITH SECONDARY DRIVERS: NORTH ISLAND ASSOCIATIONS

ASSOCIATION	TOTAL	NTH	HAR	AKL	COU	WAI	THA	TGA	BOP	PB	HB	TAR	MAN	WNG	HOR	WRP	WLG
	n=	38-46	195-241	245-321	49-62	54-70	5**	42-50	26-27*	24*-31	45-54	26*-34	60-81	9**-14*	4**	20-28*	155-205
Providing a safe environment for adults and children	75%	69%	80%	74%	74%	75%	60%	81%	73%	90%	64%	85%	79%	50%	25%	81%	73%
Encouraging good sportsmanship and fair play	73%	70%	77%	72%	73%	71%	60%	72%	59%	84%	70%	76%	78%	50%	25%	86%	68%
Fostering a sense of pride	67%	55%	73%	67%	60%	66%	60%	67%	65%	93%	61%	76%	65%	46%	50%	86%	63%
Being responsive to needs and requirements	60%	41%	66%	55%	58%	58%	60%	60%	52%	87%	67%	64%	63%	33%	25%	77%	57%
The ease of accessing the clubs venues/ fields	57%	50%	60%	53%	50%	59%	60%	60%	54%	83%	58%	42%	52%	22%	50%	81%	59%
Engaging with the local community	50%	45%	49%	47%	55%	35%	60%	63%	50%	79%	40%	63%	45%	25%	50%	76%	42%
Communicating about the coaching, officiating and event opportunities and development provided by Hockey NZ	47%	30%	51%	42%	46%	41%	60%	51%	42%	66%	40%	55%	37%	25%	25%	55%	43%
Having qualified / experienced officials	43%	28%	42%	43%	36%	42%	20%	46%	41%	69%	30%	50%	43%	17%	25%	57%	33%

Base: All respondents (Excluding Don't know/not applicable) (n=1828-2248)

Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their hockey club on each of the following...

Note: Associations are based on the club the respondents selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

■ / ■ Significantly higher/lower than Total Hockey 2018 65

SATISFACTION WITH SECONDARY DRIVERS: SOUTH ISLAND ASSOCIATIONS

ASSOCIATION	TOTAL	MLB	NSN	WST	CAN	MC	SC	NOT	COT	OTA	STH
	n=	20-21*	43-55	11*	373-472	44-52	26*-35	9**-11*	84-93	55-68	32-37
Providing a safe environment for adults and children	75%	67%	79%	82%	76%	74%	69%	45%	69%	82%	86%
Encouraging good sportsmanship and fair play	73%	76%	65%	82%	77%	67%	71%	55%	76%	76%	78%
Fostering a sense of pride	67%	67%	42%	73%	70%	67%	69%	36%	58%	78%	81%
Being responsive to needs and requirements	60%	70%	47%	82%	61%	65%	69%	45%	57%	66%	74%
The ease of accessing the clubs venues/ fields	57%	67%	60%	73%	56%	61%	46%	60%	55%	64%	70%
Engaging with the local community	50%	60%	40%	73%	51%	52%	52%	44%	58%	61%	53%
Communicating about the coaching, officiating and event opportunities and development provided by Hockey NZ	47%	48%	50%	55%	50%	50%	50%	36%	61%	40%	75%
Having qualified / experienced officials	43%	33%	35%	36%	48%	60%	46%	55%	43%	51%	48%

Base: All respondents (Excluding Don't know/not applicable) (n=1828-2248)

Q10b. How would you/ your child rate your/ their overall satisfaction with your/ their hockey club on each of the following...

Note: Associations are based on the club the respondents selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

■ / ■ Significantly higher/lower than Total Hockey 2018 66

FOCUS FOR IMPROVEMENT (IF FEES INCREASED): NORTH ISLAND ASSOCIATIONS

ASSOCIATION	TOTAL	NTH	HAR	AKL	COU	WAI	THA	TGA	BOP	PB	HB	TAR	MAN	WNG	HOR	WRP	WLG
	n=	38	177	273	43	54	4**	43	15*	25*	47	25*	60	12*	3**	21*	149
Player development programmes	23%	13%	21%	20%	33%	20%	25%	19%	13%	16%	38%	16%	33%	0%	33%	10%	19%
Quality of coaching	17%	21%	18%	19%	19%	13%	0%	0%	13%	0%	17%	12%	13%	8%	0%	24%	16%
Quality of officiating	13%	26%	24%	7%	14%	15%	0%	16%	20%	36%	26%	12%	12%	17%	33%	0%	17%
Playing/ training venues/ fields	12%	8%	11%	12%	9%	17%	50%	28%	0%	20%	4%	20%	10%	33%	0%	10%	6%
Facilities e.g. club rooms, changing rooms	9%	5%	2%	16%	7%	4%	0%	7%	20%	16%	4%	4%	7%	17%	0%	14%	8%
Number of coaches	7%	3%	8%	8%	7%	11%	0%	12%	13%	0%	2%	8%	7%	0%	0%	10%	13%
Management of the club	4%	13%	3%	5%	2%	2%	0%	2%	0%	4%	4%	12%	5%	0%	0%	5%	5%
Social activities	4%	0%	2%	3%	2%	6%	0%	9%	7%	4%	2%	4%	3%	8%	0%	19%	6%
Communications	2%	0%	1%	1%	0%	2%	0%	0%	0%	0%	0%	4%	3%	8%	0%	0%	2%
Access to equipment	2%	3%	2%	1%	0%	0%	25%	2%	7%	4%	2%	0%	0%	0%	0%	0%	0%
Other	7%	8%	8%	8%	7%	11%	0%	5%	7%	0%	0%	8%	7%	8%	33%	10%	7%

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my feed need to increase) (n=1756)

Q14. If your/ your child's hockey 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: Associations are based on the club the respondents selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

** Very small base

/ Significantly higher/lower than Total Hockey 2018 67

FOCUS FOR IMPROVEMENT (IF FEES INCREASED): SOUTH ISLAND ASSOCIATIONS

ASSOCIATION	TOTAL	MLB	NSN	WST	CAN	MC	SC	NOT	COT	OTA	STH
	n=	19*	41	9**	377	35	26	8**	77	45	29
Player development programmes	23%	5%	24%	11%	24%	26%	38%	50%	31%	27%	31%
Quality of coaching	17%	21%	24%	0%	21%	3%	19%	13%	6%	9%	7%
Quality of officiating	13%	11%	7%	22%	8%	11%	8%	25%	5%	13%	21%
Playing/ training venues/ fields	12%	11%	0%	11%	12%	6%	12%	0%	31%	9%	3%
Facilities e.g. club rooms, changing rooms	9%	26%	5%	22%	9%	14%	4%	0%	6%	2%	17%
Number of coaches	7%	16%	10%	22%	5%	9%	4%	0%	9%	2%	10%
Management of the club	4%	0%	5%	0%	5%	9%	0%	0%	0%	7%	0%
Social activities	4%	5%	7%	11%	3%	9%	8%	0%	4%	4%	10%
Communications	2%	0%	5%	0%	2%	3%	0%	13%	0%	7%	0%
Access to equipment	2%	5%	0%	0%	3%	6%	4%	0%	1%	7%	0%
Other	7%	0%	12%	0%	7%	6%	4%	0%	5%	13%	0%

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=1756)

Q14. If your/ your child's hockey 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: Associations are based on the club the respondents selected in the questionnaire at Q2a

Note: Greyed numbers are included for completeness, indicative only

* Small base size

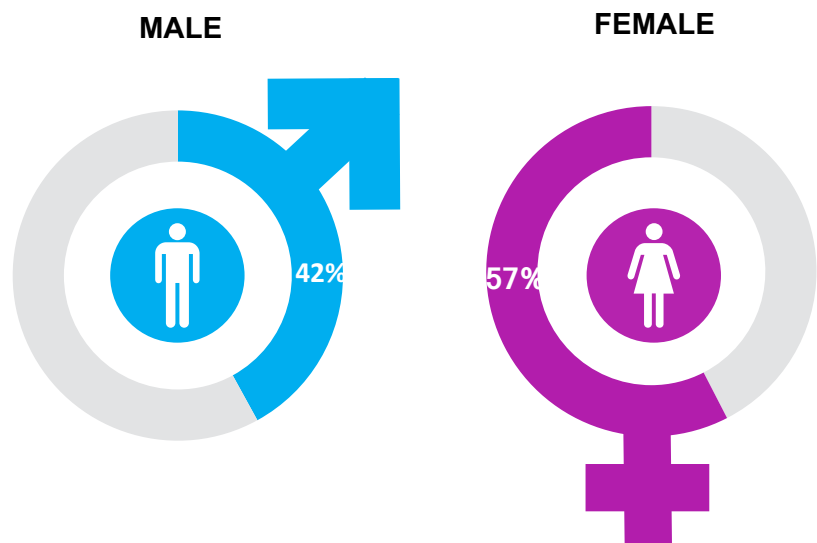
** Very small base

■ / ■ Significantly higher/lower than Total Hockey 2018 68

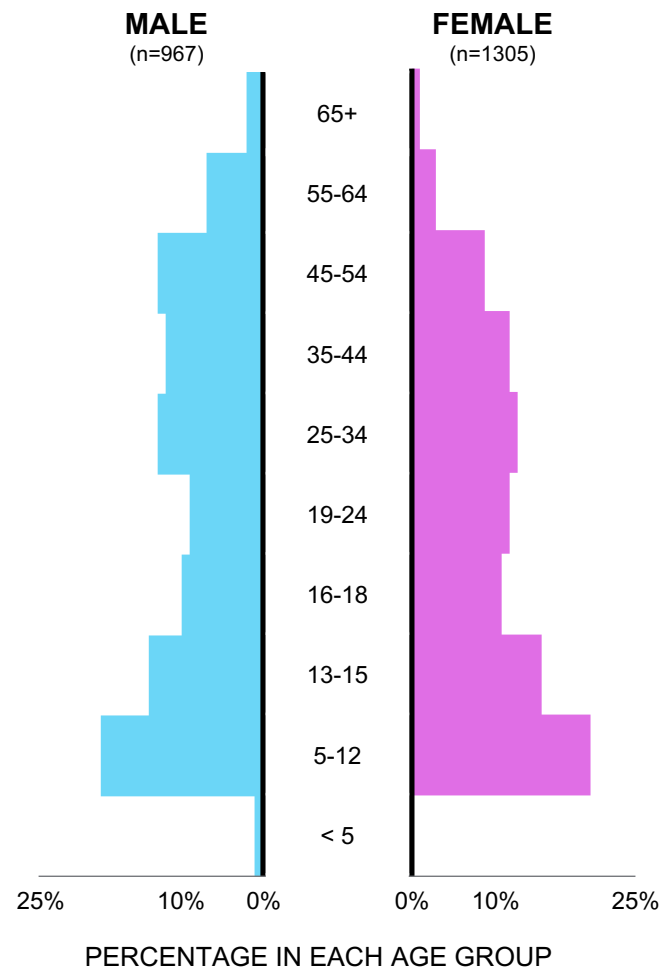
SAMPLE PROFILE

AGE-GENDER DISTRIBUTION

Half (50%) of female respondents are between the ages of 5 and 18. This is a significantly higher proportion than male respondents (44%).



GENDER (Q25)	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3632)
MALE	42%	43%	42%	46%
FEMALE	57%	57%	58%	54%
GENDER DIVERSE	<1%	<1%	-	<1%



AGE

AGE (Q22)	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3632)
Less than 5 years	<1%	<1%	1%	<1%
5-7 years	3%	<1%	9%	2%
8-10 years	9%	1%	27%	8%
11-12 years	10%	2%	29%	7%
13 years	4%	1%	12%	13-15 years (15%)
14 years	5%	3%	10%	
15 years	6%	4%	12%	
16 years	4%	6%	-	16-19 years (13%)
17 years	3%	5%	-	
18 years	3%	5%	-	
19 years	2%	3%	-	
20-24 years	9%	12%	-	11%
25-29 years	7%	10%	-	8%
30-34 years	6%	9%	-	7%
35-39 years	5%	8%	-	6%
40-44 years	6%	9%	-	7%
45-49 years	6%	9%	-	6%
50-54 years	4%	6%	-	5%
55-59 years	3%	4%	-	3%
60-64 years	2%	3%	-	2%
65-69 years	1%	1%	-	1%
70-74 years	<1%	<1%	-	<1%
75+ years	<1%	<1%	-	<1%

ETHNICITY

ETHNICITY (Q34)	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3632)
NET European/Pakeha	88%	88%	89%	88%
NET Māori	10%	10%	10%	9%
NET Samoan	1%	<1%	2%	1%
NET Pasifika	2%	1%	3%	2%
NET Asian + Indian	6%	6%	5%	6%
Asian	3%	2%	3%	2%
Indian	3%	3%	3%	4%
Other	3%	3%	3%	3%

Note: Respondents can identify with more than one ethnicity

Note: Only ethnicities with 1% or greater are shown

REGION OF RESIDENCE

REGION (Q23)	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3632)
Northland	2%	3%	1%	3%
Auckland	28%	30%	22%	31%
Waikato	4%	5%	2%	5%
Bay of Plenty	4%	4%	4%	3%
Gisborne	2%	2%	1%	1%
Hawke's Bay	3%	3%	1%	3%
Taranaki	2%	2%	2%	2%
Manawatu	4%	5%	1%	5%
Whanganui	1%	1%	<1%	1%
Wellington-Wairarapa	11%	13%	8%	13%
Tasman	1%	1%	1%	<1%
Nelson	1%	1%	1%	2%
Marlborough	1%	1%	<1%	1%
West Coast	1%	1%	<1%	<1%
Canterbury	26%	19%	43%	21%
Otago	9%	8%	11%	8%
Southland	2%	2%	2%	1%

ROLE AT CLUB & MEMBERSHIP TENURE

ROLE (Q67)	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3632)
PLAYING MEMBER	92%	92%	92%	87%
NON-PLAYING MEMBER	2%	3%	-	8%
CASUAL	3%	3%	2%	1%
EVENTS	1%	1%	2%	-
OTHER	2%	1%	4%	6%

MEMBERSHIP TENURE (Q3)	TOTAL (n=2138)	PLAYER (n=1517)	PARENT (n=621)	TOTAL 2017 (n=3433)
Less than 1 year	22%	20%	26%	20%
1-2 years	19%	16%	27%	19%
3-5 years	31%	28%	37%	31%
6-10 years	12%	12%	10%	13%
More than 10 years	17%	23%	<1%	17%

COMPETITIVE LEVEL & PLAYING FREQUENCY

COMPETITIVE LEVEL (Q28)	TOTAL (n=2138)	PLAYER (n=1517)	PARENT (n=621)	TOTAL 2017 (n=3432)
Played for the top team at my club	34%	36%	30%	37%
Been selected to represent my club at a regional event/ competition	12%	10%	16%	10%
Been selected to represent my region at a national event/ competition	23%	25%	20%	23%
Been selected to represent New Zealand at an international event/ competition	3%	4%	-	5%
None of these	53%	52%	57%	52%

FREQUENCY OF PLAYING/ TRAINING (Q5)	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3477)
Less than once a week / month	3%	4%	<1%	2%
Once a week / month	18%	22%	9%	19%
Two or three times a week / month	58%	54%	70%	59%
Four or five times a week / month	14%	13%	15%	14%
6 or more times a week / month	5%	6%	5%	6%
Other	1%	2%	1%	1%

MAJOR ASSOCIATION

ASSOCIATION	TOTAL (n=2276)	PLAYER (n=1602)	PARENT (n=674)	TOTAL 2017 (n=3632)
Auckland	14%	14%	15%	18%
Bay of Plenty	1%	1%	1%	1%
Canterbury	21%	16%	33%	16%
Central Otago	4%	2%	9%	3%
Counties Manukau	3%	3%	3%	2%
Hawke's Bay	2%	3%	1%	3%
Horowhenua	<1%	<1%	-	<1%
Manawatu	4%	4%	1%	4%
Marlborough	1%	1%	<1%	1%
Mid Canterbury	2%	1%	5%	2%
Nelson	2%	2%	3%	2%
North Harbour	11%	13%	4%	9%
North Otago	<1%	<1%	<1%	<1%
Northland	2%	3%	1%	3%
Otago	3%	4%	1%	4%
Poverty Bay	1%	2%	<1%	1%
South Canterbury	2%	1%	2%	3%
Southland	2%	2%	1%	1%
Taranaki	1%	2%	1%	2%
Tauranga	2%	2%	2%	2%
Thames Valley	<1%	<1%	<1%	<1%
Waikato	3%	4%	1%	4%
Wairarapa	1%	1%	1%	1%
Whanganui	1%	1%	<1%	1%
Wellington	9%	11%	5%	10%
West Coast	<1%	<1%	<1%	<1%

Note: Associations are based on the club the respondent selected in the questionnaire at Q2a

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.

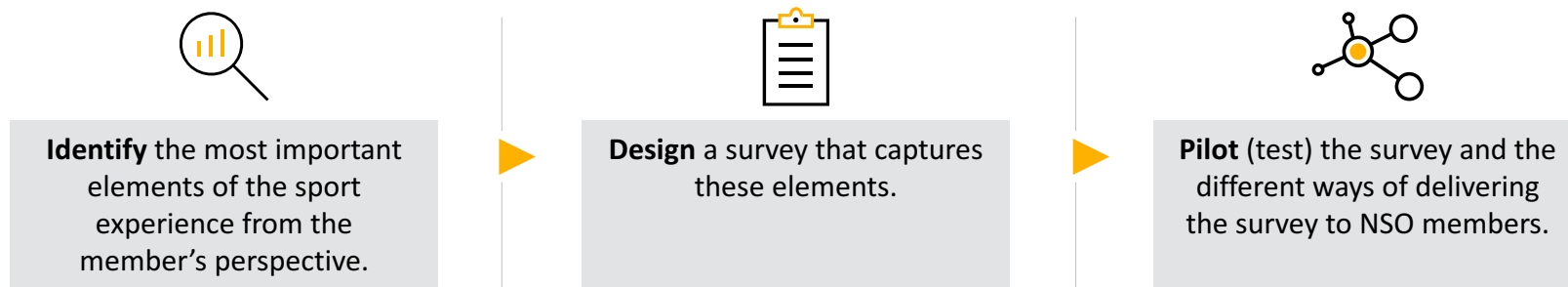
In future, the programme may also roll out to cover events/ tournaments, RSTs/RSDs, TAs/ Councils, activities and even children doing sport at school.

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.

DEVELOPMENT OF THE VOP PROGRAMME

While some work had previously been undertaken by Sport NZ and NSOs to create draft 'welcome' and 'mid-season' surveys, it was felt it was important to incorporate the participant's point of view on what was most important to them and then test the reviewed surveys.

In 2015, an initial development phase was undertaken to design the survey tools i.e.



The development phase involved both **qualitative** and **quantitative** components:

- ▶ Qualitative research (two online bulletin boards with 28 participants) to understand what makes a good or bad experience and what players consider their ideal experience.
- ▶ Based on the qualitative findings, Nielsen designed an online questionnaire. Nielsen then piloted the questionnaire using three different methods of delivery, with members of four NSOs; New Zealand Football, Tennis New Zealand, Bowls New Zealand and New Zealand Rugby League.
- ▶ Subsequently, in consultation with Sport NZ and NSOs, Nielsen reviewed the survey tools and created a Survey Guide.

Results from NSOs surveyed in winter 2017 and summer 2018 have been combined to create results for the 2017/18 year. Sports surveyed in 2017/18 were; badminton, basketball, football, hockey, rugby, rugby league (winter), waka ama, softball, surf life saving and cricket (summer).

METHODOLOGY OF VOP WINTER 2018

SAMPLE



Hockey New Zealand supplied Nielsen a database, consisting of 31,882 members, along with a full list of clubs and associations.

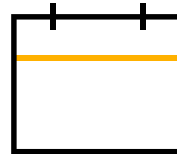
APPROACH



An email invitation, containing a personalised* online link to the survey, was sent by Nielsen to members to invite them to complete the survey.

An open link was also supplied to Hockey New Zealand to distribute via their own communication channels e.g. Facebook, newsletters etc.

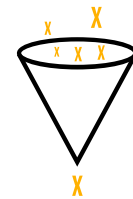
FIELDWORK



The Sport NZ VOP Club Experience Survey was conducted between 20 July and 13 August 2018.

Reminders were sent during fieldwork on 30 July and 06 August.

RESULT



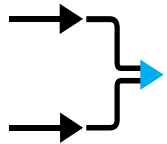
A total of 2,276 hockey respondents nationwide completed the survey, consisting of 1,602 players and 674 parents of players/children under the age of 16.

This gave a maximum margin of error on the Total Hockey 2018 result of $\pm 2.1\%$.

* A personalised link was used if one or two people were attributed to the one email address. An open 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

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.

Nielsen has created a regression model unique to Hockey New Zealand. The dependent variable for the regression model is **recommendation** (the likelihood of a respondent to recommend their club to someone interested in playing hockey). The independent variables are the attributes/ drivers in Q10a, Q10b and Q11, including any optional or additional attributes.

The [drivers of recommendation chart](#) illustrates 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). Respondents' satisfaction ratings with each of the driver is shown on the horizontal axis. This illustration allows us to see what aspects are more important but rated lower - that is where associations should focus, in order to improve recommendation.

