



# COMMUNITY SPORT VOP PROGRAMME

NETBALL

NOVEMBER 2019



**NETBALL**  
NEW ZEALAND  
POITARAWHITI AOTEAROA

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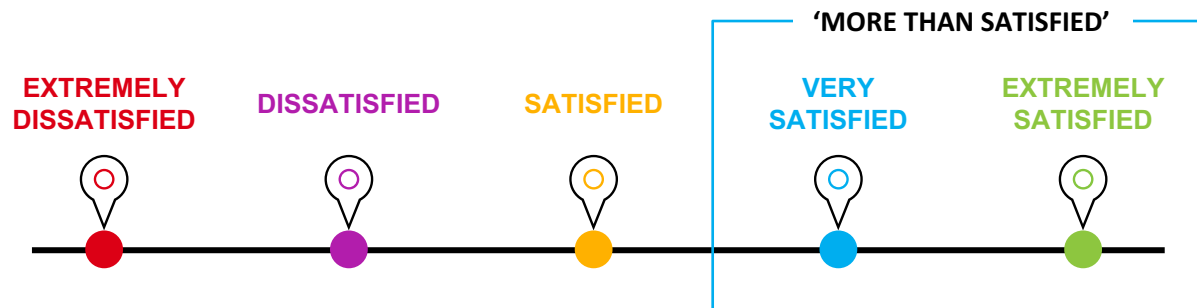
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# INTRODUCTION

This report looks at the experiences of Netball New Zealand participants in 2019 and how this compares with previous results in 2016 and 2018, and with the 10 sports that took part for the year 2018/19 (see page 68). For more information about the background and objectives of the VOP Programme and this research please refer to the [‘Background, Objectives and Approach’](#) section.

More than 3,400 Netball New Zealand members participated. Typically, adults aged 16+ complete the questionnaire themselves (‘players’) and parents/guardians (‘parents’) complete the questionnaire for children under the age of 16, on behalf of their child. The proportion of player and parent respondents in 2019 is 50% player and 50% parent.

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



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

**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. We are 95% confident results are not just normal expected variances that result from talking to a different sample within the same population.

**Statistical significance** is reported in the following ways:

▲ / ▼ The sub-group is significantly higher / lower than the Total Netball 2018 result

□ / □ The Total Netball 2019 result is significantly higher / lower than the total for All Sports 2018/19

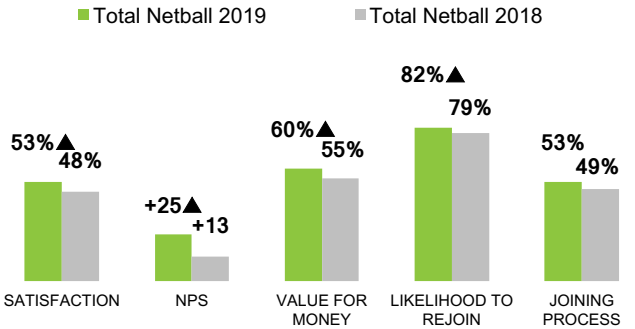
# SNAPSHOT OF PARTICIPANTS' EXPERIENCES

**SAMPLE OVERVIEW**

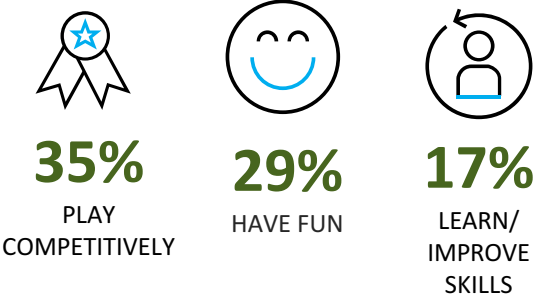
**2019** participants: n=3,414  
 n= 1,724 players (50%)  
 n= 1,690 parents (50%)

**2018** participants: n=2,895  
 n= 1,414 players (49%)  
 n= 1,481 parents (51%)

## KEY METRICS



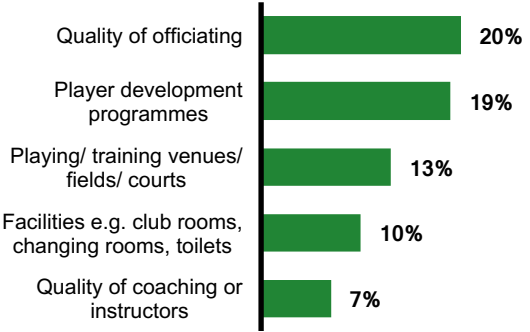
## REASONS FOR BELONGING (TOP 3)



## MOST IMPORTANT DRIVERS



- 1** VALUE FOR MONEY  
60% very/extremely satisfied
- 2** BEING PROFESSIONAL AND WELL MANAGED  
57% very/extremely satisfied
- 3** FAIR AND EQUAL OPPORTUNITIES  
52% very/extremely satisfied

## ONE ASPECT YOU WOULD IMPROVE (IF FEES INCREASED)






▲▼ Significantly higher/lower than Total Netball 2018


# EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
<b>KEY METRICS</b> 	SATISFACTION	Satisfaction with the overall netball centre experience has continued to improve from 2016, with 2019's results higher than both 2016 and 2018.
	NPS	There is a significant improvement in NPS relative to 2018 (+25 cf. +13).
	VALUE FOR MONEY	Consistent with improvements in satisfaction and NPS, perceived value for money has also increased, with significantly more Netball players & parents agreeing they are getting good value for money from their centre (60% cf. 55% in 2018).
	LIKELIHOOD TO REJOIN	Respondents' likelihood to rejoin their netball centre showed a significant increase in 2019 relative to both 2018 and 2016 (82% in 2019 selecting likely/very likely cf. 79% in 2018 and 78% in 2016).
<b>DRIVERS OF EXPERIENCE</b> 	DRIVERS	<p>Netball's performance in key and secondary drivers has improved from its 2018 results. Of the top five most important drivers, all have increased significantly from 2018:</p> <ul style="list-style-type: none"> <li>• <i>Being professional and well managed</i> (57% cf. 52% in 2018)</li> <li>• <i>Is fair and provides equal opportunities</i> (52% cf. 46%)</li> <li>• <i>Being responsive to my needs and requirements</i> (48% cf. 40%)</li> <li>• <i>Allowing me to fulfil my potential</i> (53% cf. 46%)</li> <li>• <i>Being friendly and welcoming</i> (59% cf. 53%)</li> </ul> <p>While satisfaction has improved, being <i>fair and providing equal opportunities</i> is still considered a 'priority for improvement' due to its high level of importance and below average satisfaction levels.</p> <p>Compared with the All Sports 2018/19 results – with a few exceptions – Netball still scores lower than average on the majority of drivers.</p>

# EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
 <p>ENVIRONMENT</p>	ENVIRONMENT & SIDE LINE BEHAVIOUR	<p>There is a significant improvement this year in the netball centre <i>providing a supportive and encouraging environment, reflecting the cultural diversity of their community and having an emphasis on fun and enjoyment</i>. However, the centre environment is viewed more negatively compared with other sports (All Sports 2018/19).</p> <p>The frequency of inappropriate behaviour experienced by netball players is significantly lower than in 2018. However, the proportion who experience this at least occasionally is still significantly higher than the All Sports 2018/19 result.</p>
 <p>INJURY</p>	INJURY	<p>Injury rates are significantly lower than 2018 and are on par with the All Sports 2018/19 average. Those who were injured were mostly satisfied with the support and involvement they received from their centre.</p>
 <p>DIFFERENCES ACROSS ZONES</p>	ZONES	<p>Netball Mainland has significantly higher scores on overall satisfaction (57% cf. 53%) and likelihood to recommend their centre (+36 cf. +25).</p> <p>Netball Central has significantly lower scores on likelihood to recommend (+17 cf. +25) and perceived value for money (56% cf. 60%). Central also has significantly lower satisfaction scores on two key drivers for recommendation:</p> <ul style="list-style-type: none"> <li>• <i>Being professional and well managed</i> (52% cf. 57%)</li> <li>• <i>Is fair and provides equal opportunities</i> (46% cf. 52%)</li> </ul> <p>Respondents from Netball Central are more likely to indicate that if fees were to increase, that investment should be reflected in the <i>quality of officiating</i> (26% cf. 20%) and <i>management of the centre</i> (8% cf. 5%).</p>

# EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
<b>DEMOGRAPHIC DIFFERENCES</b> 	ETHNICITY	Those who identify as Māori tend to be more dissatisfied with their netball experience, shown by significantly lower scores in overall satisfaction (49% cf. 53%), NPS (+20 cf. +25) and value for money (53% cf. 60%). It should be noted that scores for Māori have improved from 2018, with significant increases in NPS (+20 cf. +6) and value for money (53% cf. 45%).
	GENDER	Due to the low number of males who responded, the key metric results between male and female are largely consistent with the netball total.
	AGE	<p>Primary/ intermediate aged players (5-12 years) report having a more positive netball experience, with significantly higher scores in overall satisfaction (62% cf. 53%), NPS (+34 cf. +25), value for money (70% cf. 60%) and likelihood to rejoin (86% cf. 82%).</p> <p>Young adults (19-34 years) report a less positive sentiment towards their centre, with significantly lower scores in overall satisfaction (44% cf. 53%), NPS (+19 cf. +25), value for money (45% cf. 60%) and likelihood to rejoin (77% cf. 82%).</p>

# KEY RESULTS



# KEY METRIC RESULTS

OVERALL, HOW ARE NETBALL CENTRES PERFORMING?

SATISFACTION			NPS			VALUE FOR MONEY			LIKELIHOOD TO REJOIN			JOINING PROCESS <sup>^</sup>		
53%▲▲			+25▲▲			60%▲▲			82%▲▲			53%		
2018	2016	All Sports 2018/19	2018	2016	All Sports 2018/19	2018	2016	All Sports 2018/19	2018	2016	All Sports 2018/19	2018 <sup>^</sup>	2016	All Sports 2018/19
48%	46%	64%	+13	+11	+41	55%	57%	74%	79%	78%	85%	49%	-	57%

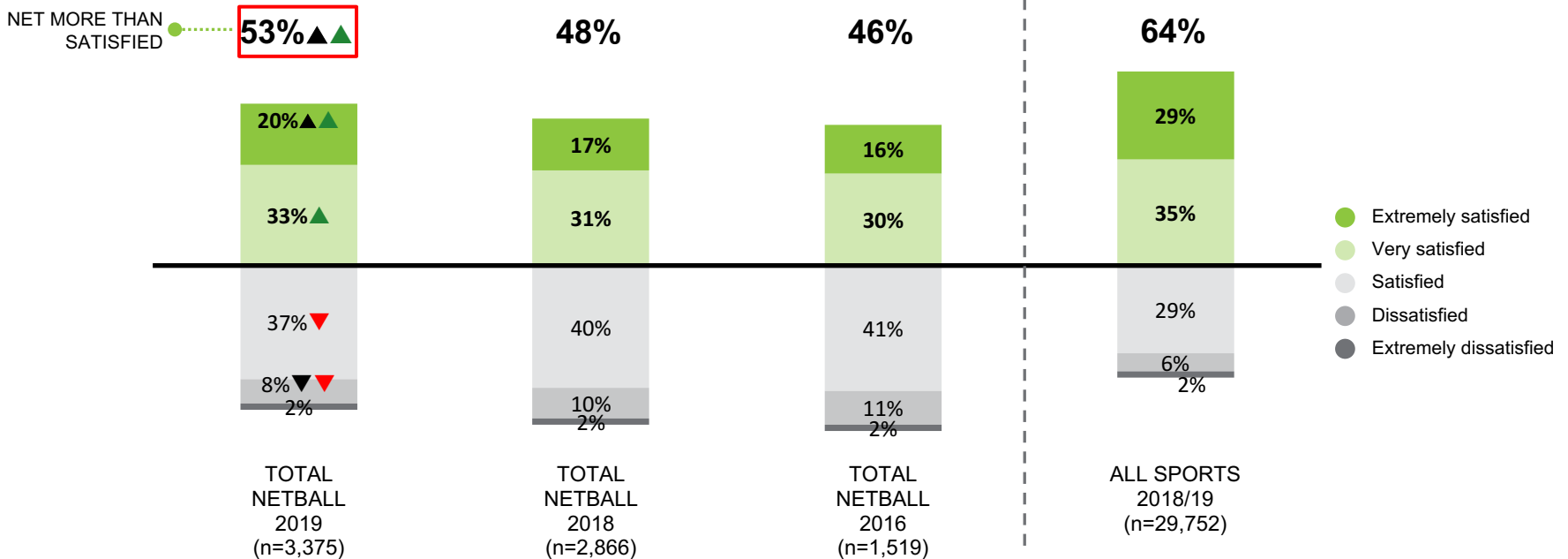
Base: Q6/Q7/Q11 All Respondents (Excluding Don't know/ Can't say), Q9 Members (Excluding Don't know/Can't say), Q20 New Members (Excluding Don't know/ Can't say)  
 Total Netball/All Sports 2018/19: Q6 (n= 3,375/ 29,752)/ Q7 (n=3,331/ 29,706)/ Q11 (n=3,286/ 29,119) / Q9 (n=2,926/ 27,759)/ Q20 R6 (n=451/ 5,633)  
<sup>^</sup> please note change in metric in 2018 (previously average of four joining process attributes)

▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016  
 □□ Significantly higher/lower than All Sports 2018/19

# JUST OVER HALF ARE MORE THAN SATISFIED WITH THEIR NETBALL CENTRE EXPERIENCE

Netball respondents in 2019 are significantly more positive about their overall experience compared with 2018 (53% cf. 48%). This is highlighted by a significantly higher result for those who are extremely satisfied (20% cf. 17%).

## SATISFACTION WITH CENTRE EXPERIENCE



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

- ▶ Of **Indian** ethnicity (69% cf. 53%)
- ▶ Aged **5-12 years** (62%)
- ▶ **Parents of players** (58%)
- ▶ From **Netball Mainland** (57%).

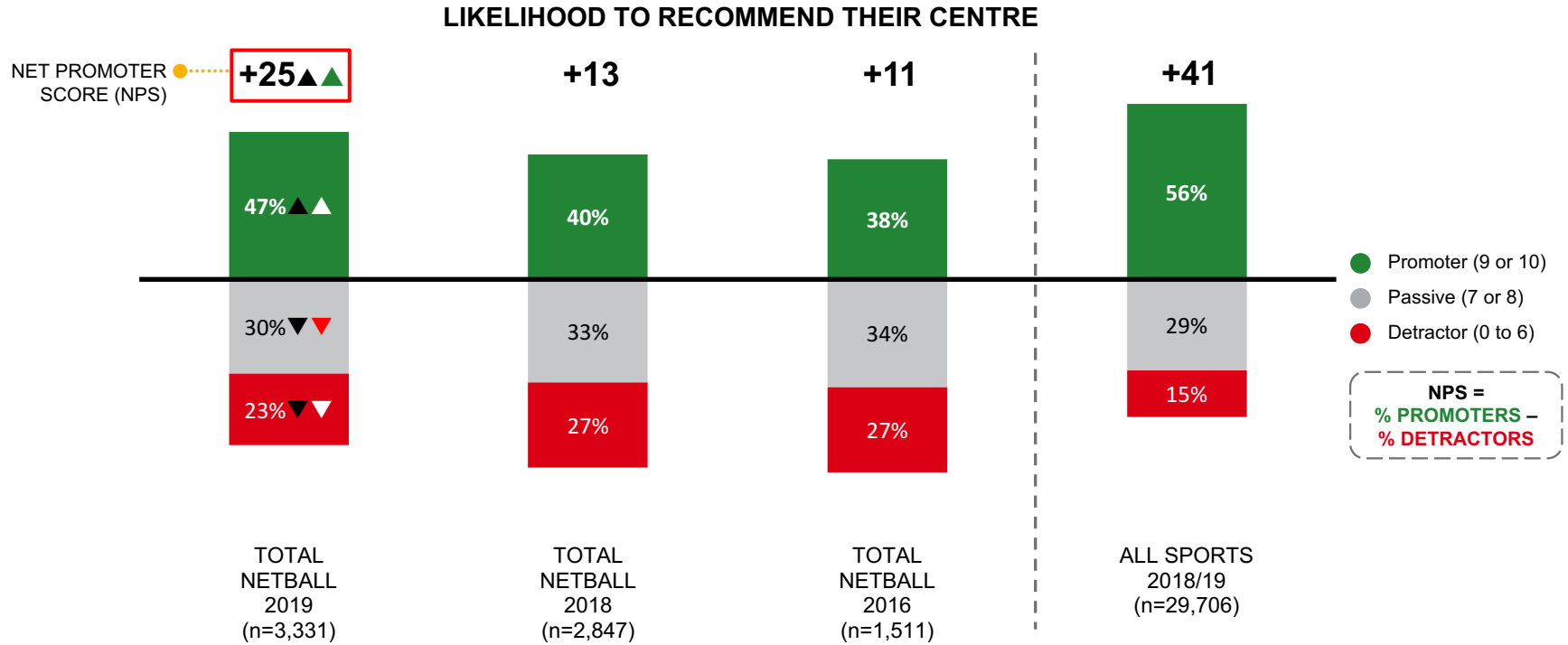
Those **significantly less** likely to be more than satisfied are:

- ▶ **Older adults** (35+ years) (42% cf. 53%) or **young adults** (19-34) (44%)
- ▶ **Players** (48%)
- ▶ Of **Māori** ethnicity (49%).

▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016  
 □ Significantly higher/lower than All Sports 2018/19

# IMPROVEMENT IN PLAYERS SPEAKING POSITIVELY OF THEIR NETBALL CENTRE

There is a significant improvement in NPS relative to 2018 (+25 cf. +13). There is a substantial increase in promoters (47% cf. 40%) as well a reduction in detractors (23% cf. 27%) and passives (30% cf. 33%).



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

- ▶ Aged **55-64 years** (66% cf. 47%) or **5-12 years** (52%)
- ▶ From **Netball Mainland** (53%).

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

- ▶ Aged **35-44 years** (36% cf. 23%)
- ▶ From **Netball Central** (29%)
- ▶ Of **Māori** ethnicity (28%).

Base: All respondents (Excluding don't know)

Q7. If someone asked you/ your child, how likely are you/ their Netball centre to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

▲▼ Significantly higher/lower than Total Netball 2018  
▲▼ Significantly higher/lower than Total Netball 2016  
□□ Significantly higher/lower than All Sports 2018/19

# WHAT IS GOING WELL AND WHAT COULD BE IMPROVED?

*"The people are there to help, encourage and support you. They are generous with their time, skill sharing, information and communication. This centre is well organised because of an active committee and parents who volunteer their time to help when needed. Duty nights, umpiring, coaching, travelling, fundraising and information sharing so our children can play netball. I am pleased that my 14 year old daughter soon to be 15 years old loves playing at this centre."*

**Parent, 15 years, Waikato**

*"Improved umpiring in social grades. Every week it is so different and some weeks we have had umpires who have very limited knowledge of the rules."*

**Parent and player, 35-39 years, Canterbury**

*"The culture can always improve. I think some clubs have a real disrespect for umpires and actually forget that umpires are on their own journey to develop. The latter is often forgotten."*

**Player, 25-29 years, Wellington-Wairarapa**

*"There is not a particularly strong competition for my area. I'm an adult wanting to play with other adults and there just isn't the support for it being rural. There is more emphasis on little kids netball which is a good thing but I do think there could be more encouragement for adults too."*

**Player, 35-39 years, Southland**



## WHAT PEOPLE LOVE ABOUT THEIR CENTRE (Q8a)

*"As a teacher myself I highly recommend the way that NZ Netball has changed and promotes participation and skills as the base to the game. Having many quiet and not so confident students put their hands up to play was so awesome."*

**Parent, Less than 5 years, Bay of Plenty**

*"I think it is because it is a supportive centre. They do a lot of work in developing young players through the pathways. The committee works hard to make the centre a safe environment for everyone to enjoy."*

**Player, 44-49 years, Wellington-Wairarapa**

## IMPROVEMENTS FOR 9 OR 10 RATING (Q8b)

*"Level of Umpiring would need to improve. The format of the rounds seems to change every year i.e. how grading is done, how semi's and finals and handled. Grading seems adhoc and there seems to be no structure to how teams are put in grades."*

**Player, 45-49 years, Canterbury**

## WHAT NEEDS TO IMPROVE (Q8c)

*"Upgrade of the hoops that are bent out of shape."*

**Parent, 8-10 years, Auckland**

*"Poor facilities. Hoops spin round in holes when shooting. Court surface is old and dangerous to play on. No toilet facilities for early games as recreation centre isn't open. No first aid service at court."*

**Parent, 12 years, Tasman**

*"Regular cleaning of the toilet facilities on game days. They are disgusting."*

**Parent, 50-54 years, Auckland**

Base: All respondents excluding don't know/none

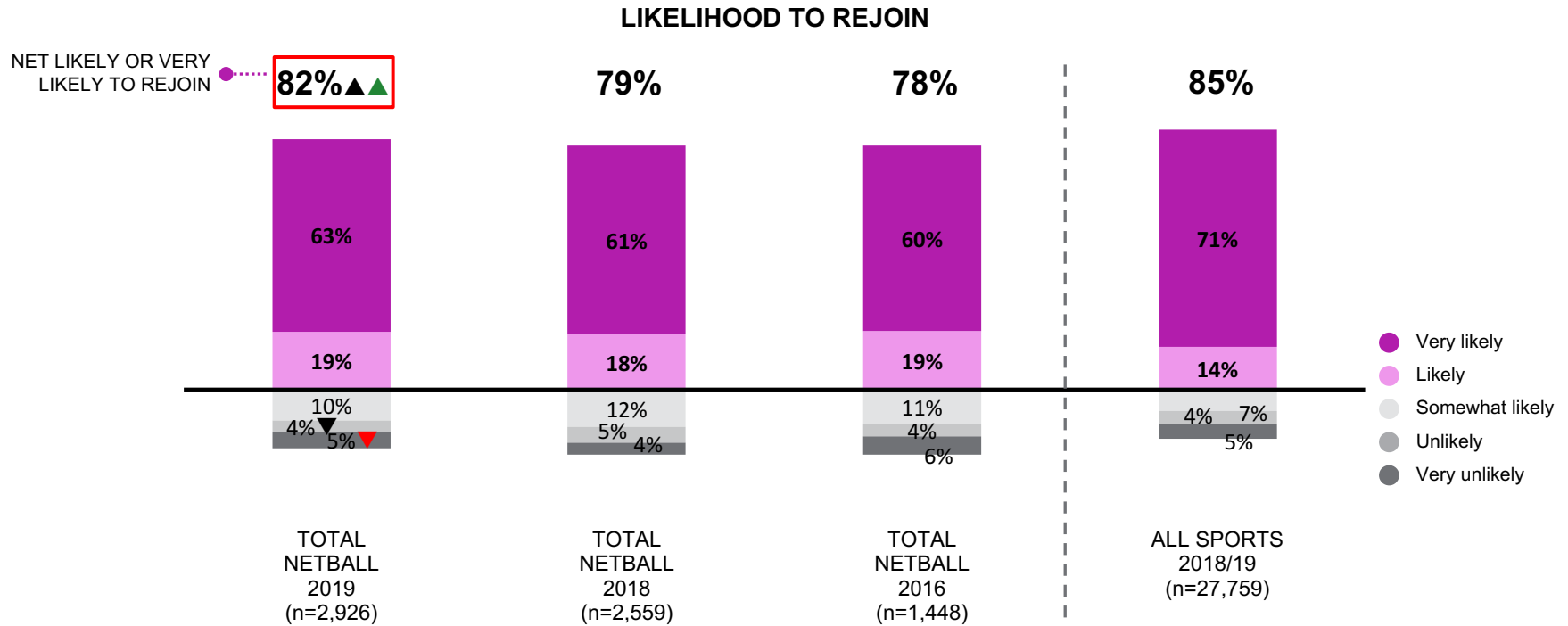
Q8a. What is it that you love about your/ your child's centre?

Q8b. What would need to improve at your centre for you to give it a score of 9 or 10?

Q8c. What would need to improve at your centre for you to improve your rating?

# OVER 4 IN 5 MEMBERS INTEND TO REJOIN THEIR CENTRE NEXT SEASON

A significantly higher proportion intend to rejoin their centre next season compared with 2018 (82% cf. 79%). This is slightly lower compared with the average recorded for all sports in 2018/19.



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

- ▶ Aged 5-12 years (86% cf. 82%).

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

- ▶ Young adults (19-34 years) (77% cf. 82%).

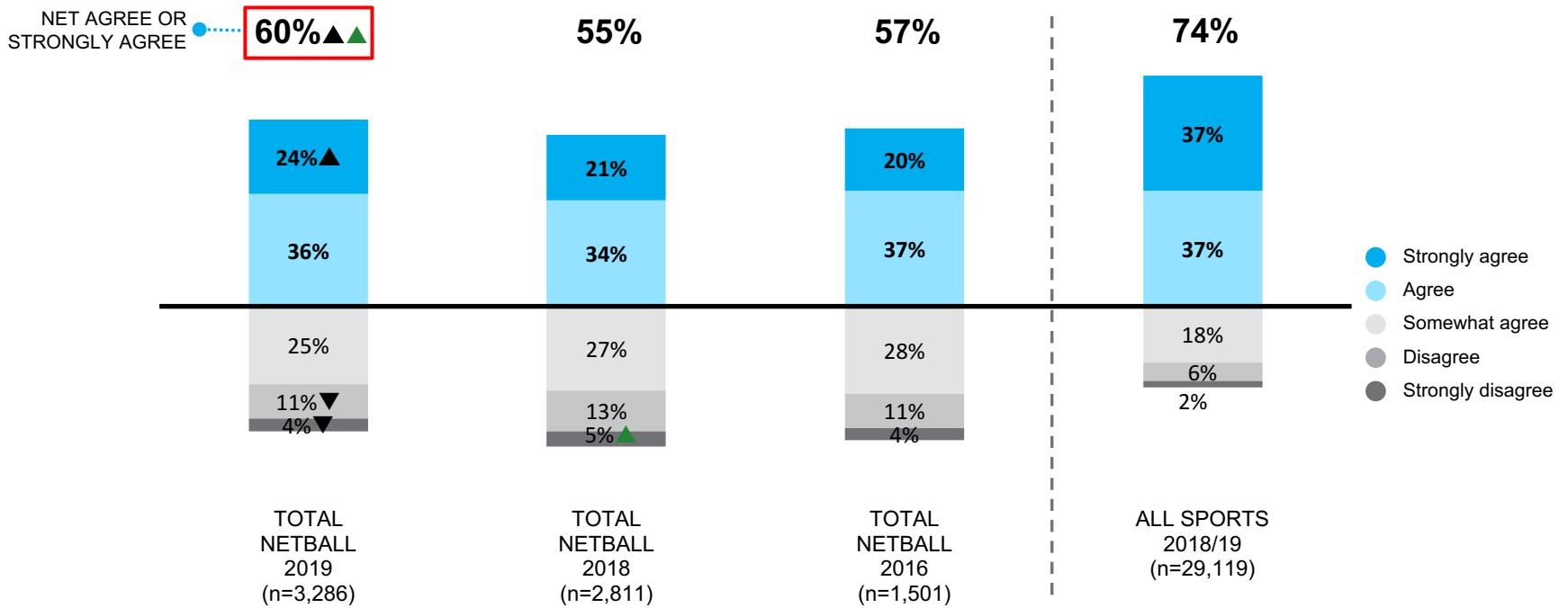
▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016

□ Significantly higher/lower than All Sports 2018/19

# THREE IN FIVE BELIEVE THEY RECEIVE VALUE FOR MONEY FROM THEIR NETBALL CENTRE

A significantly higher proportion perceived their netball centre to offer good value for money compared with both 2018 and 2016 (60% cf. 55% in 2018). However, it is worth noting that the current performance is still significantly lower than the all sports 2018/19 total.

## PERCEPTIONS OF VALUE FOR MONEY



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

- ▶ Aged **5-12 years** (70% cf. 60%) or aged **13-18 years** (64%)
- ▶ **Parents of players** (67%).

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

- ▶ From **Netball Central** (56% cf. 60%)
- ▶ **Players** (54%)
- ▶ Of **Māori** ethnicity (53%)
- ▶ Aged **35+ years** (48%) or **19-34 years** (45%).

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 centre make it well worth the money I/ you or they pay

- ▲▼ Significantly higher/lower than Total Netball 2018
- ▲▼ Significantly higher/lower than Total Netball 2016
- Significantly higher/lower than All Sports 2018/19

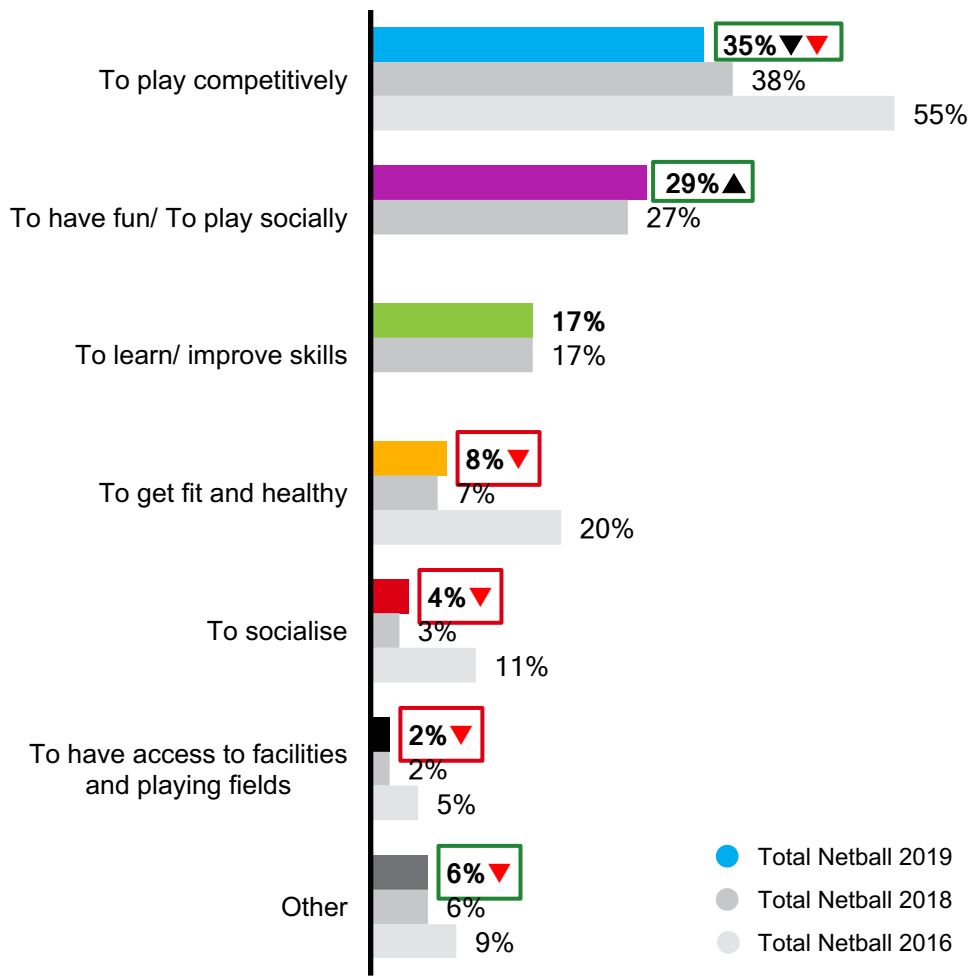
# THE MAIN REASON TO BELONG TO A CENTRE IS TO PLAY COMPETITIVELY

Compared with 2018, fewer people belong to their netball centre *to play competitively* (35% cf. 38%). Those more likely to belong to their centre to play competitively are secondary school aged (13-18 years) (52% cf. 35%) or young adults (46%).

*To have fun or to play socially* is the second most popular reason that people belong to their centre, with almost a third (29%) choosing this option. Those more likely to say this is their main reason is those from Mainland Netball (34% cf. 29%), older adults (35+ years) (34%) or those primary or intermediate school age (5 to 12 years) (33%).

Almost one in five (17%) indicated their main reason for belonging was *to learn/ improve skills* – a similar result to 2018. Those of primary/ intermediate school age and those of Pasifika ethnicity were more likely to select this option (31% and 24% respectively cf. 17%).

REASONS FOR BELONGING



▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016  
 □ Significantly higher/lower than All Sports 2018/19

# WHAT IS CAUSING THESE RATINGS?

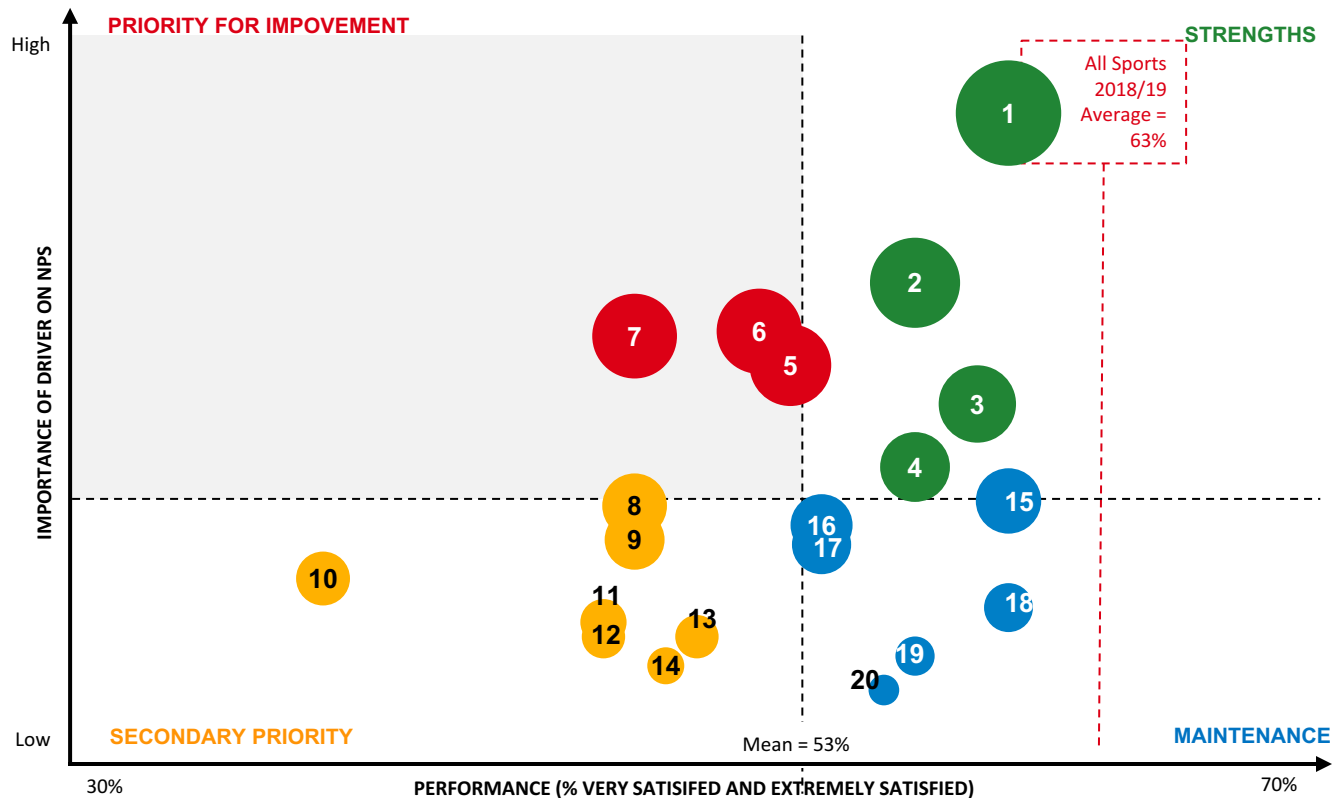


# WHAT DRIVES A RESPONDENT'S RECOMMENDATION?

The top three drivers of recommendation for Netball are:

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

Of these top three drivers, emphasis should be placed on improving being *fair and providing equal opportunities*. This has a relatively large impact on NPS and respondents are less satisfied.



**STRENGTHS**

1. Value for money
2. Being professional and well managed
3. Being friendly and welcoming
4. Encouraging good sportsmanship and fair play

**PRIORITY**

5. Allowing me to fulfil my potential
6. Is fair and provides equal opportunities

**SECONDARY PRIORITY**

7. Being responsive to my needs and requirements
8. Engaging with the local community
9. Communicating with you about opportunities provided by Netball NZ
10. Having experienced/qualified officials available
11. Providing player development programmes
12. Encouraging good player welfare principles
13. The amount and timeliness of information about competitions and draws
14. The ease of accessing the centre's courts for training or causal playing

**MAINTENANCE**

15. Providing a safe environment for adults and children
16. Providing me information when needed
17. The social environment at the centre
18. Having well maintained playing/ training courts
19. The quality of the coaches or instructors
20. Having clean and well maintained facilities

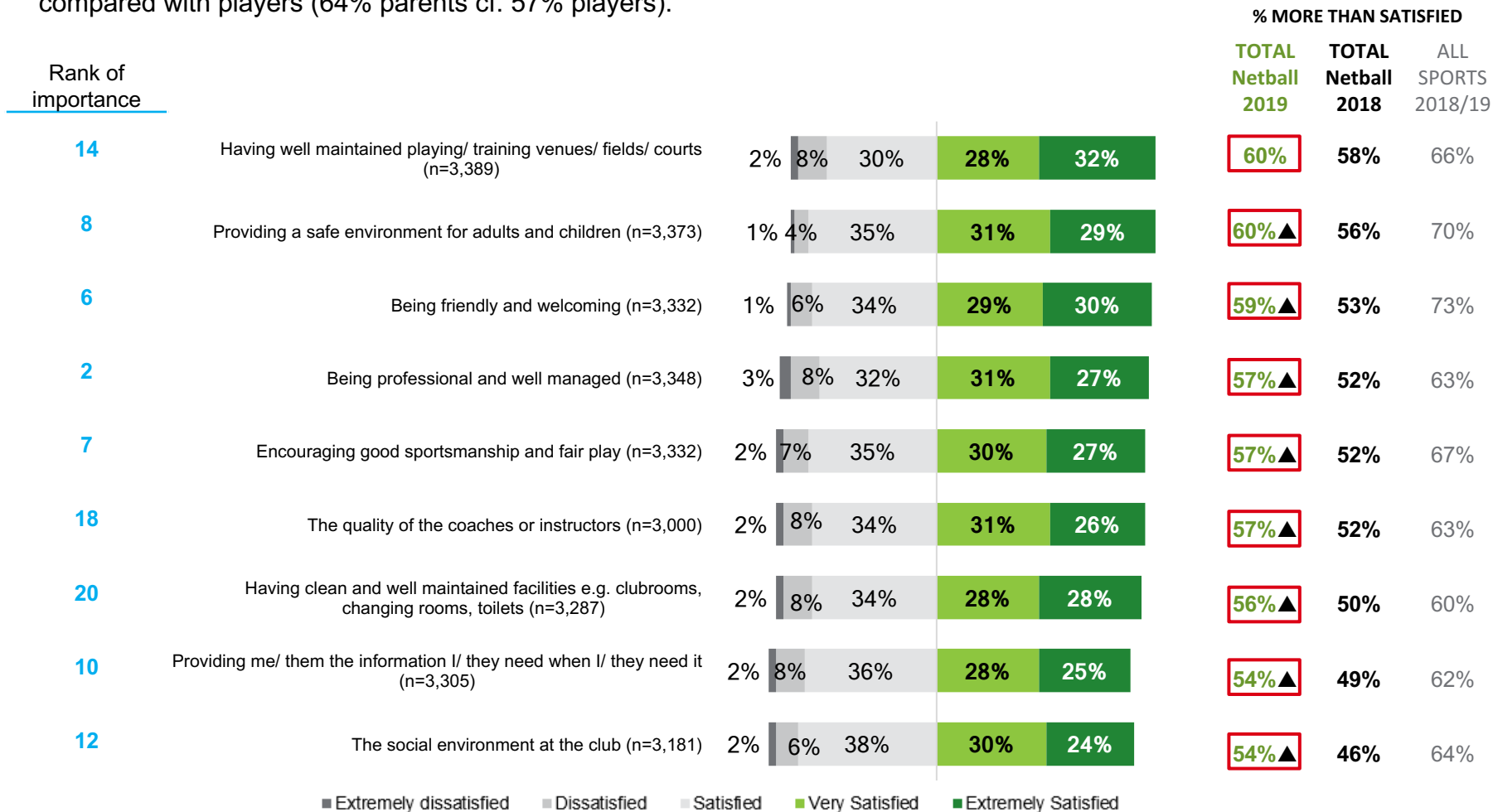
Base: All respondents (Excluding Don't know/not applicable)

Q7. Imagine someone is interested in playing or participating in Netball. If they asked you, how likely are you to recommend your centre 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.

# PERFORMANCE IN DRIVERS OF CENTRE EXPERIENCE

Compared with its 2018 results, Netball has made significant improvements in all areas except *having well maintained playing/ training courts*. However, parents are significantly more likely to be very/ extremely satisfied with this area compared with players (64% parents cf. 57% players).



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

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

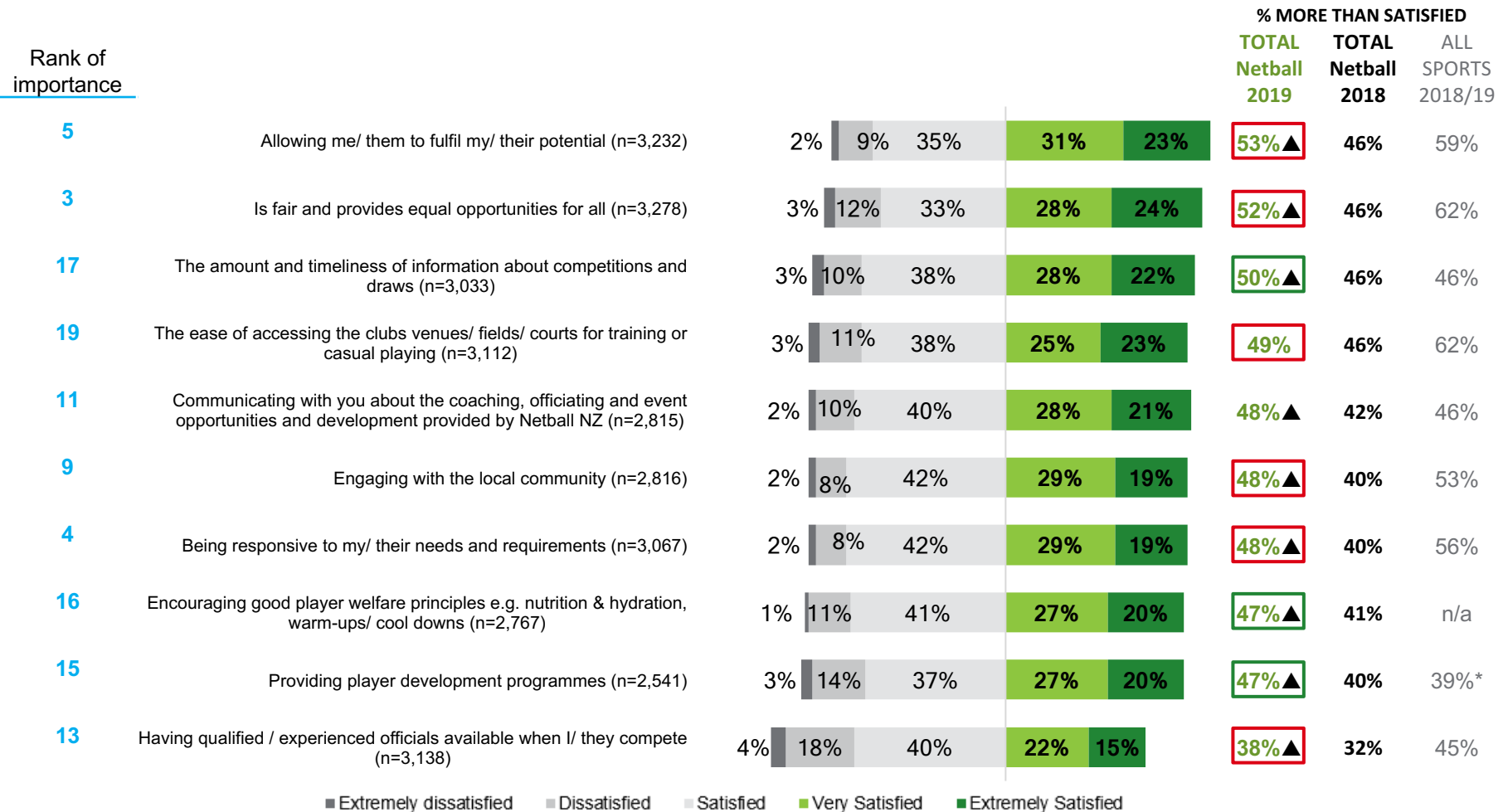
Q10b. How would you rate your/ your child's overall satisfaction with your/ their netball centre on each of the following...

▲▼ Significantly higher/lower than Total Netball 2018

□□ Significantly higher/lower than All Sports 2018/19

# PERFORMANCE IN DRIVERS OF CENTRE EXPERIENCE n

Whether Netball *is fair and provides equal opportunities* is ranked as the third most important driver but has a relatively low level of satisfaction. Compared with All Sports 2018/19, Netball performs significantly stronger for *the amount and timeliness of information about competitions and draws* (50% cf. 46%) and *providing player development programmes* (47% cf. 39%).



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

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

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

\* Only asked of Netball and two other sports in 2018/19

▲▼ Significantly higher/lower than Total Netball 2018

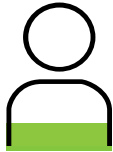
□□ Significantly higher/lower than All Sports 2018/19

# IF MEMBERSHIP FEES INCREASED, ONE IN FIVE WOULD WANT TO SEE INVESTMENT REFLECTED IN QUALITY OF OFFICIATING

The desire for investment to be reflected in the *quality of officiating* remains consistent with Netball's 2016 and 2018 results.

Young adults (19-34 years) and older adults (35+ years) are significantly more likely to indicate that if fees were to increase that the investment be reflected in the *quality officiating* (32% and 25% respectively cf. 20%). Players (25%) and those from Netball Central (26%) are also more likely to select this.

Compared with the 2016 results, significantly fewer people indicate they want investment in *playing/ training venues/ courts* (13% cf. 16%), *facilities* (10% cf. 13%) and *quality of coaching or instructors* (7% cf. 12%).



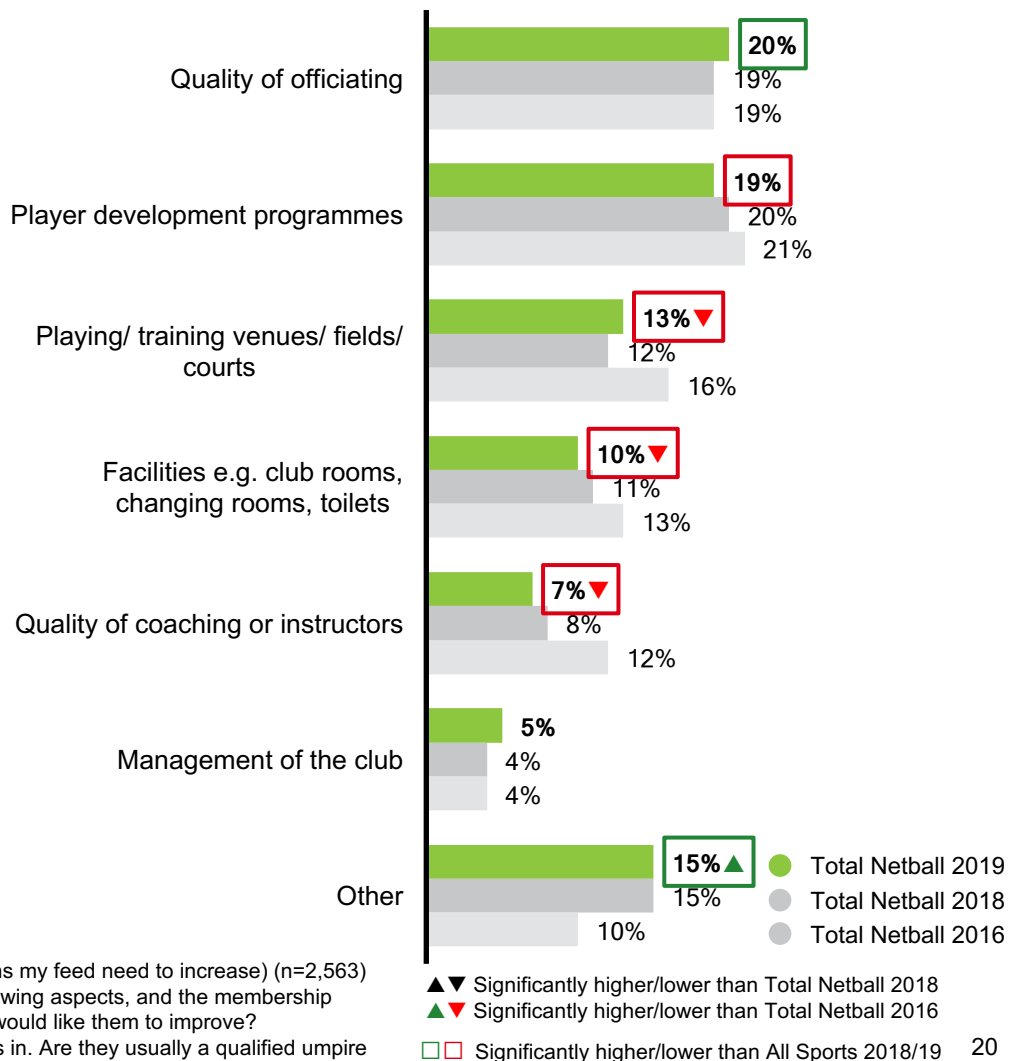
**15%**  
Would not want anything improved if it meant their fees increased

**USUAL UMPIRES FOR LEAGUE/COMPETITION PLAY IN**

<b>36%</b> QUALIFIED UMPIRES	<b>52%</b> COACH/PLAYER UMPIRES	<b>12%</b> DON'T KNOW
------------------------------------	---------------------------------------	-----------------------------

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my feed need to increase) (n=2,563) Q14. If your/ your child's netball centre 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? Q59. Thinking about the umpires for the league or competition you/your child play/plays in. Are they usually a qualified umpire or a coach/player/spectator?

## FOCUS FOR IMPROVEMENT



# WHAT SHOULD BE INVESTED IN OR IMPROVED?

*"Would be good to see money go towards umpire development. Maybe some more programmes for beginner adults? We always need umpires and good ones are very rare!"*

**Player, 30-24 years, Northland**

*"Better development of top level umpires - there is a huge difference in quality between prem 1 and prem 2 umpires and it would be great if there were more talented umpires coming through. Maybe the recruitment and retention of umpires could be looked at - it could be made more accessible and have some incentive attached?"*

**Player, 20-29 years, Wellington-Wairarapa**

*"Building a strong representative team across all ages from year 7 to U19 to maintain a strong group of players to choose. Scouting for the strong players at the end of one season and offering an off season programme for the top players to keep fitness levels up and for the coaches to get an idea of which players they would like in teams. This should not be done 2-3 weeks before the first representative tournament."*

**Player, 18 years, Auckland**

*"Improved surfacing to avoid slipperiness."*

**Parent of player, 8-10 years, Canterbury**

*"There is no room for teams to warmup before games, as usually there are about three courts to warm up on for about 20+ teams. If there were more warmup courts people would be able to warmup properly and therefore reduce the risk of injury."*

**Player, 15 years, Waikato**



## QUALITY OF OFFICIATING



## PLAYER DEVELOPMENT PROGRAMMES



## PLAYING/ TRAINING VENUES/ FIELDS/ COURTS

*"More umpiring classes to make sure everyone who umpires is confident in what they're doing and give them tips on how to deal with people on the courts."*

**Player, 20-24 years, Tasman**

*"A shortage of umpires available. A lot of young girls start off with enthusiasm, but are put off by the comments and judgements made by parents on the side-line. I think having some mentors working with the girls for a few weeks each season would help them grow, learn and provide them with some support to stick with it."*

**Parent of player, 14 years, Auckland**

*"Programmes for players that aren't part of a rep team. It can be quite daunting when a large number of the players are rep players and also their attitude can make other players feel incompetent."*

**Parent of player, 14 years, Wellington-Wairarapa**

*"More on offer at a more advanced level. Have attended a couple of development programmes that were a bit basic for my daughter's skill level. She felt they didn't teach her anything new or push her enough."*

**Parent of player, 11 years, Auckland**

*"Need a new court surface as holds water and many uneven surfaces. Very old. Need to fix hoops that wobble and move while playing on some courts. Practise area with good surface and hoops would be great."*

**Parent of player, 12 years, Tasman**

*"An indoor facility where more teams can play netball inside or more undercover areas on the outdoor courts for bad weather."*

**Player, 20-24 years, Taranaki**



# OTHER RESULTS

# DEMOGRAPHIC DIFFERENCES

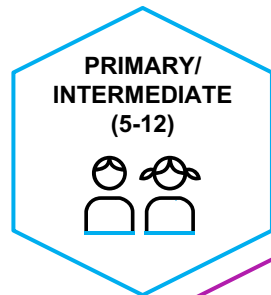
# PERFORMANCE ACROSS KEY AGE BREAKS

KEY MEASURE		TOTAL (n=451-3,375)	Primary/Intermediate (5-12 years) (n=245-1,214)	Secondary (13-18 years) (n=66-942)	Young Adults (19-34 years) (n=101-538)	Older Adults (35+) (n=37-688)
<b>SATISFACTION</b> (% more than satisfied)	2019	53%▲	62%▲▲	55%	44%▲▼	42%▼
	2018	48%	55%	53%	36%	40%
<b>NPS</b> (% promoters less % detractors)	2019	+25▲	+34▲▲	+22▲▼	+19▲▼	+17▼
	2018	+13	+19	+15	-3	+13
<b>VALUE FOR MONEY</b> (% agree or strongly agree)	2019	60%▲	70%▲▲	64%▲	45%▲▼	48%▼
	2018	55%	64%	61%	35%	45%
<b>LIKELIHOOD TO REJOIN</b> (% likely or very likely)	2019	82%▲	86%▲▲	80%	77%▼	80%
	2018	79%	80%	80%	73%	79%
<b>JOINING PROCESS</b> (% more than satisfied)	2019	53%	56%	50%	53%	41%
	2018	49%	53%	40%	48%	49%

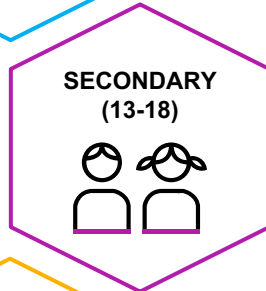


# HOW DO KEY AGE BRACKETS DIFFER?

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



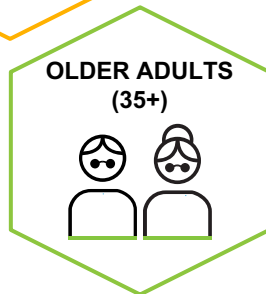
- ▶ Indicate the main reason they belong to a centre is to *have fun/ play socially* (33% cf. 29%) and to *learn/improve skills* (33% cf. 17%)
- ▶ Play or train 2-3 times a week (78% cf. 68%)
- ▶ Be more than satisfied with the key drivers:
  - *The quality of the coaches or instructors* (63% cf. 57%)
  - *Is fair and provides equal opportunities for all players* (58% cf. 52%)
  - *Being professional and well managed* (63% cf. 57%)
  - *Encouraging good player welfare principles e.g. nutrition & hydration, warm-ups/ cool downs* (53% cf. 47%)
- ▶ Indicate the focus for improvement (if fees increased) should be on *player development programmes* (28% cf. 19%).



- ▶ Indicate the main reason they belong to a centre is to *play competitively* (52% cf. 35%)
- ▶ Play or train four or more times a week (28% cf. 12%)
- ▶ Be more than satisfied with the key drivers:
  - *Having well maintained playing/ training venues/ fields/ courts* (64% cf. 60%)
- ▶ Indicate the focus for improvement (if fees increased) should be on *quality of coaching or instructors* (11% cf. 7%).



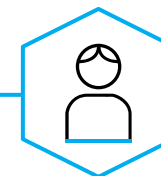
- ▶ Indicate the main reason they belong to a centre is to *play competitively* (46% cf. 35%)
- ▶ Play or train 2-3 times a week (71% cf. 68%)
- ▶ Indicate the focus for improvement (if fees increased) should be on *quality of officiating* (32% cf. 20%).



- ▶ Indicate the main reason they belong to a centre is to *have fun/ play socially* (34% cf. 29%), to *get fit and healthy* (12% cf. 8%) and to *socialise* (8% cf. 4%)
- ▶ Play or train once a week or less (37% cf. 18%)
- ▶ Be more than satisfied with the key drivers:
  - *Providing player development programmes* (51% cf. 47%)
- ▶ Indicate the focus for improvement (if fees increased) should be on *playing/ training venues/ courts* (16% cf. 13%), *management of the centre* (10% cf. 5%) and the *quality of officiating* (25% cf. 20%).

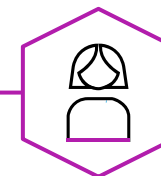
# PERFORMANCE ACROSS GENDER

KEY MEASURE		TOTAL (n=451-3375)	MALE (n=10*-51)	FEMALE (n=439-3320)
<b>SATISFACTION</b> (% more than satisfied)	2019	53%▲	56%	53%▲
	2018	48%	50%	48%
<b>NPS</b> (% promoters less % detractors)	2019	+25▲	+31	+25▲
	2018	+13	+21	+13
<b>VALUE FOR MONEY</b> (% agree or strongly agree)	2019	60%▲	59%	60%▲
	2018	55%	65%	55%
<b>LIKELIHOOD TO REJOIN</b> (% likely or very likely)	2019	82%▲	79%	82%▲
	2018	79%	70%	79%
<b>JOINING PROCESS</b> (% more than satisfied)	2019	53%	70%	53%
	2018	49%	17%	50%



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

- ▶ Indicate the main reason they belong to a centre is to *have access to facilities and playing fields/ venues/ courts* (7% of males cf. 2% of females)
- ▶ Play or train once a week or less (32% of males cf. 18% of females)



▶ There are no significant differences for this group.

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

\*Small sample size

▲▼ Significantly higher/lower than Total Netball 2018  
▲▼ Significantly higher/lower than Total Netball 2019

# PERFORMANCE ACROSS ETHNICITY

KEY MEASURE		TOTAL (n=451-3375)	NET European (n=359-2747)	Māori (n=94-820)	NET Pasifika (n=43-262)	NET Asian & Indian (n=17*-97)
<b>SATISFACTION</b> (% more than satisfied)	2019	53%▲	54%▲▲	49%▼	55%▲	62%
	2018	48%	50%	45%	45%	53%
<b>NPS</b> (% promoters less % detractors)	2019	+25▲	+26▲▲	+20▲▼	+23▲	+33
	2018	+13	+16	+6	+5	+22
<b>VALUE FOR MONEY</b> (% agree or strongly agree)	2019	60%▲	61%▲▲	53%▲▼	61%▲	63%
	2018	55%	57%	45%	50%	62%
<b>LIKELIHOOD TO REJOIN</b> (% likely or very likely)	2019	82%▲	82%▲	80%	83%	80%
	2018	79%	80%	77%	75%	77%
<b>JOINING PROCESS</b> (% more than satisfied)	2019	53%	55%	61%	63%	29%
	2018	49%	50%	50%	53%	42%

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

\*Small sample size

▲▼ Significantly higher/lower than Total Netball 2018  
▲▼ Significantly higher/lower than Total Netball 2019

# HOW DO THE LARGEST CULTURAL GROUPS DIFFER?

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



- ▶ There are no significant differences for this group.



- ▶ Play or train four or more times a week (16% cf. 12%).



- ▶ Indicate the main reason they belong to a centre is to *learn/improve skills* (24% cf. 17%) and to *get fit and healthy* (12% cf. 8%)
- ▶ Play or train four or more times a week (21% cf. 12%)
- ▶ Indicate the focus for improvement (if fees increased) should be on *player development programmes* (25% cf. 19%).



- ▶ Be more than satisfied with the key drivers:
  - *Allowing me/ them to fulfil my/ their potential* (65% cf. 53%)
  - *Having qualified / experienced officials available when I/ they compete* (49% cf. 38%).

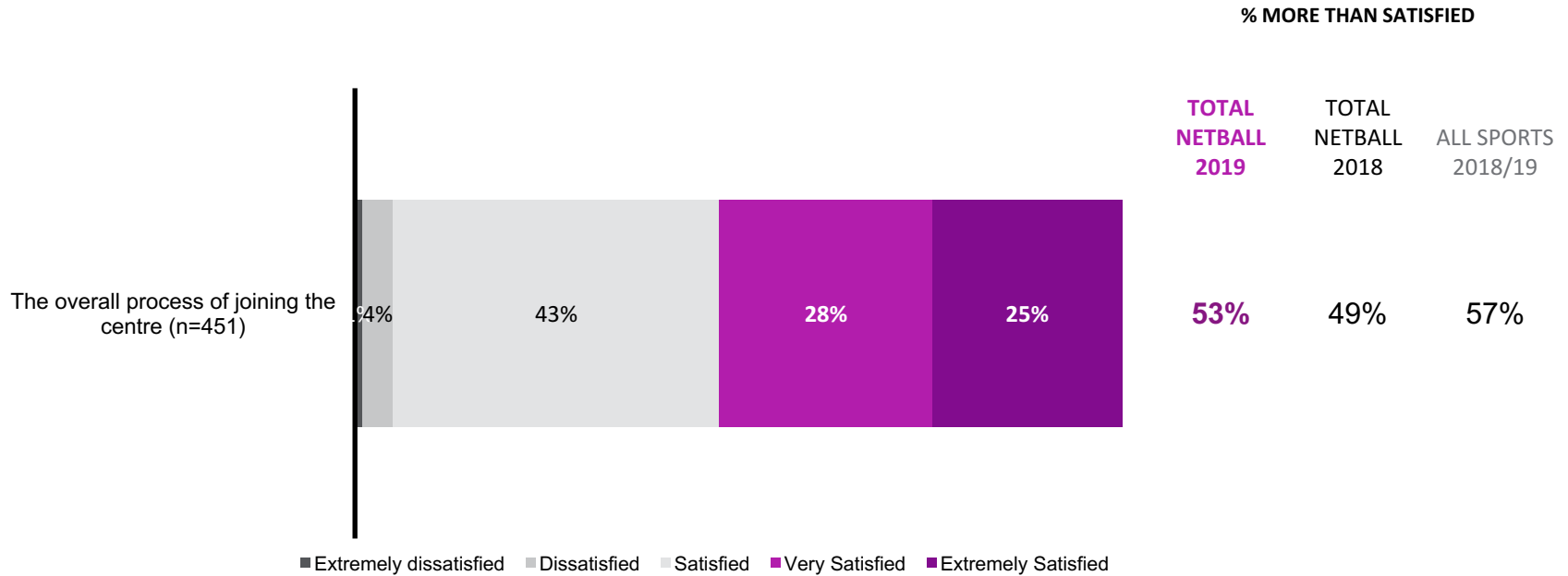
Q34. Which ethnic group or groups do/ does you/ your child identify with or belong to?

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

# THE JOINING PROCESS

# JOINING PROCESS

Satisfaction with the overall process of joining a netball centre has improved slightly from 2018 but is still slightly below the All Sports 2018/19 average.



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 netball centre. How satisfied are you with your/ their netball centre on the following...

Q66. Thinking of when you/your child registered to play netball at <insert centre from Q2a>. Did you/your child register through a centre, school or directly with <insert centre from Q2a>?

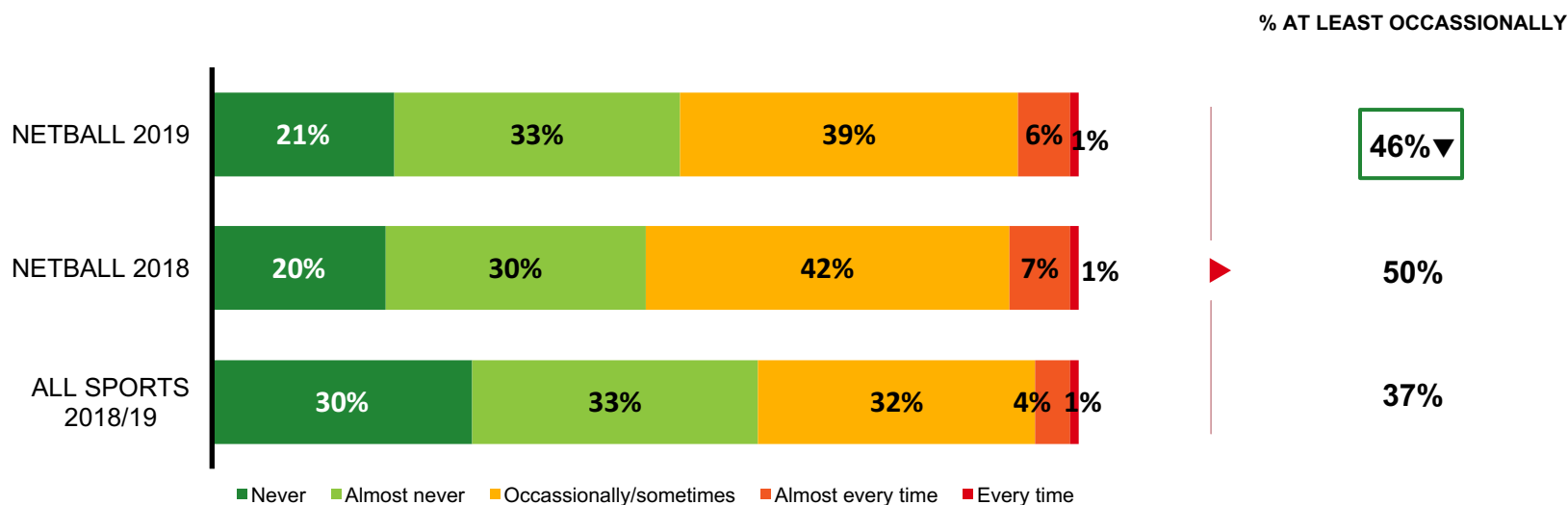
▲▼ Significantly higher/lower than Total Netball 2019

□ □ Significantly higher/lower than All Sports 2018/19

# SIDELINE BEHAVIOUR & CENTRE ENVIRONMENT

# FREQUENCY OF INAPPROPRIATE BEHAVIOUR AT A GAME

Just under half (46%) indicated that they have experienced or witnessed inappropriate behaviour at least occasionally while playing netball. Despite this result being lower than it was in 2018 (50%), it is still significantly higher than the all sports 2018/19 result.



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

- ▶ Those whose role at the centre is an umpire/referee (14% cf. 7%), volunteer (13%), manager of a team (11%) and/or coach/instructor (10%)
- ▶ Aged 19-24 years (12%) or 35-44 years (10%)
- ▶ Those who have represented their region at a national level (12%).

Base: All respondents (Excluding Don't know/not applicable) (n=3,375)

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

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

▲▼ Significantly higher/lower than Total Netball 2018

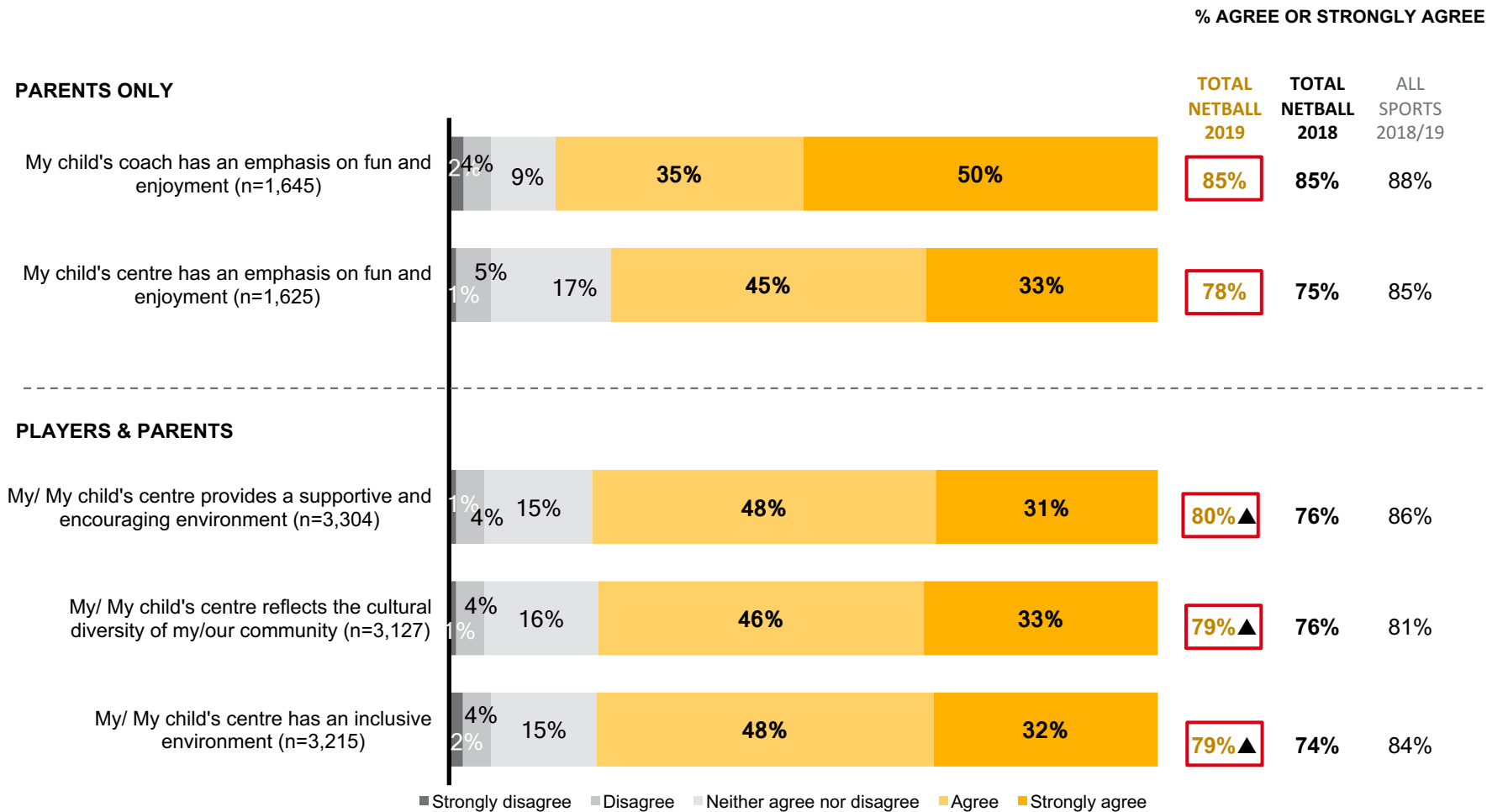
□ Significantly higher/lower than All Sports 2018/19



# CENTRE ENVIRONMENT

There is a significant improvement this year in the netball centre *providing a supportive and encouraging environment, reflecting the cultural diversity of their community and having an emphasis on fun and enjoyment.*

Older adults (35+ years) are significantly more likely to disagree that their centre *provides and supportive and encouraging environment and has an inclusive environment* (both 10% cf. 6%).



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

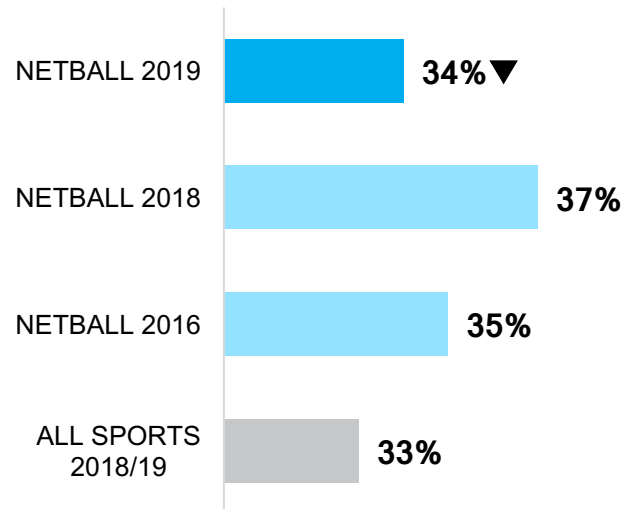
▲▼ Significantly higher/lower than Total Netball 2018

□ Significantly higher/lower than All Sports 2018/19

# INJURY MANAGEMENT

# THERE HAS BEEN A REDUCTION IN THE PROPORTION OF NETBALL PLAYERS GETTING INJURED THIS YEAR

% OF RESPONDENTS  
INJURED IN THE LAST 12 MONTHS



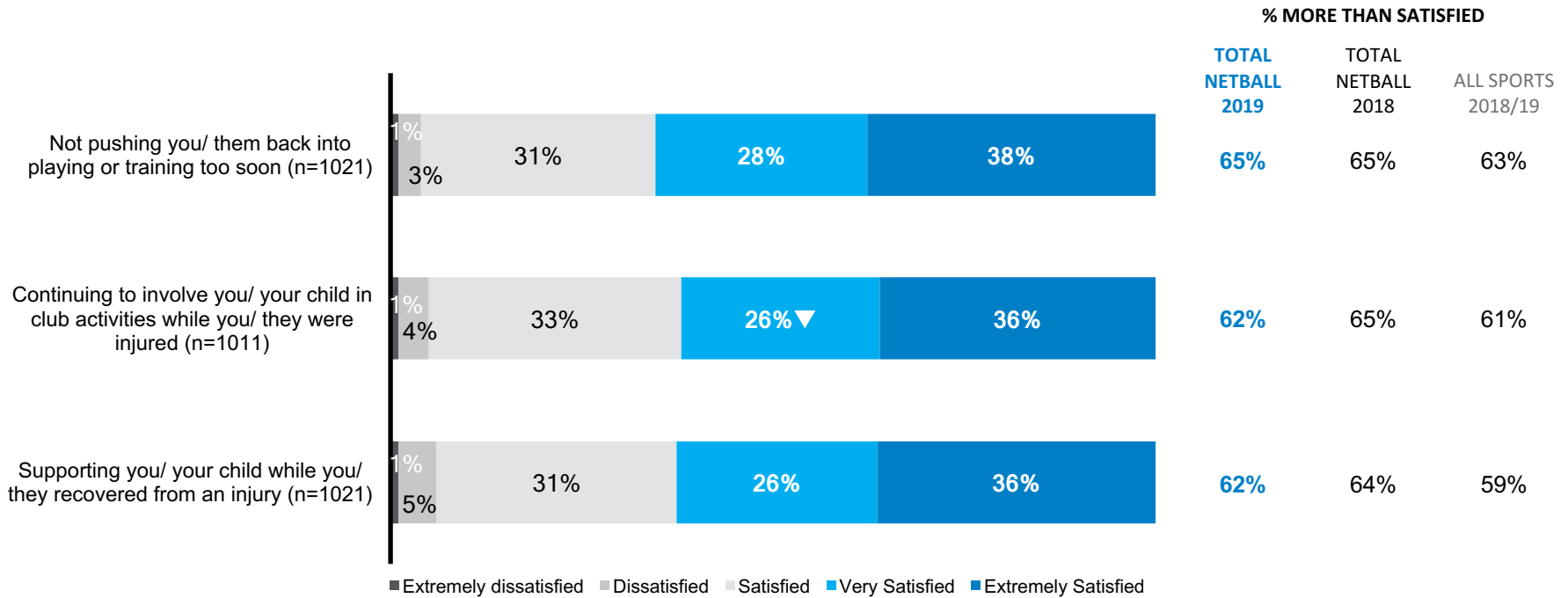
Those **significantly more** likely to have been injured are:

- ▶ Play or train four or more times a week (51% cf. 34%)
- ▶ Secondary school age (13-18 years) (47%) or young adults (19-34 years) (42%)
- ▶ Part of the top team or higher (45%)
- ▶ Belong to a centre to play competitively (43%)
- ▶ An official/ referee (41%).

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

- ▶ Belong to a centre to learn/ improve skills (24% cf. 34%)
- ▶ Play or train once a week or less (24%)

# AROUND TWO THIRDS ARE MORE THAN SATISFIED WITH THE INJURY MANAGEMENT AT THEIR CENTRE



Base: All respondents (Excluding Don't know/not applicable)  
 Q18. How satisfied are you/is your child with your/ your child's centre, coach, instructor or manager on the following...

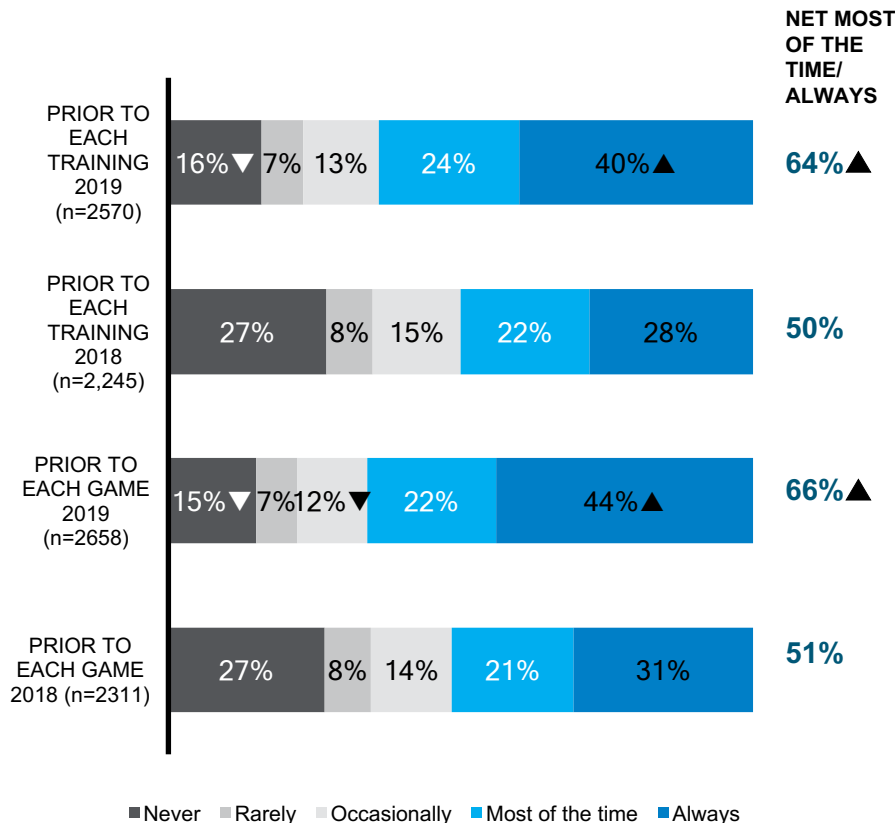
▲▼ Significantly higher/lower than Total Netball 2018

□ Significantly higher/lower than All Sports 2018/19

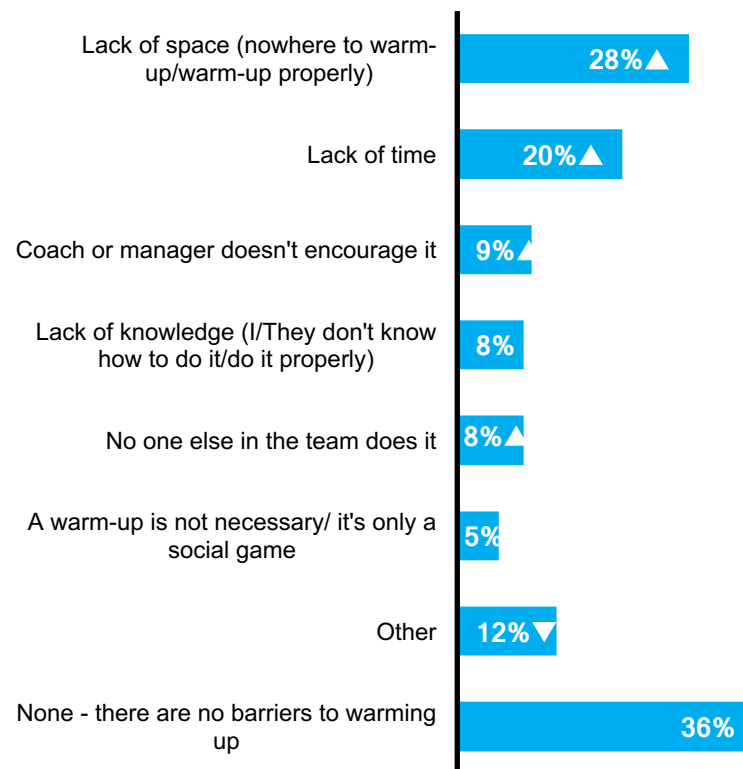
# FREQUENCY OF NETBALLSMART WARM-UP

Two in three netball respondents say they use NetballSmart to warm-up most of the time or always prior to training (64%) or prior to a game (66%), a significant improvement for both areas compared with 2018. Of those who do not warm up, around one in four (28%) mentioned it was due to a lack of space, while one in five (20%) mention a lack of time.

## FREQUENCY OF USE OF NETBALLSMART



## WHY DID THEY NOT WARM UP



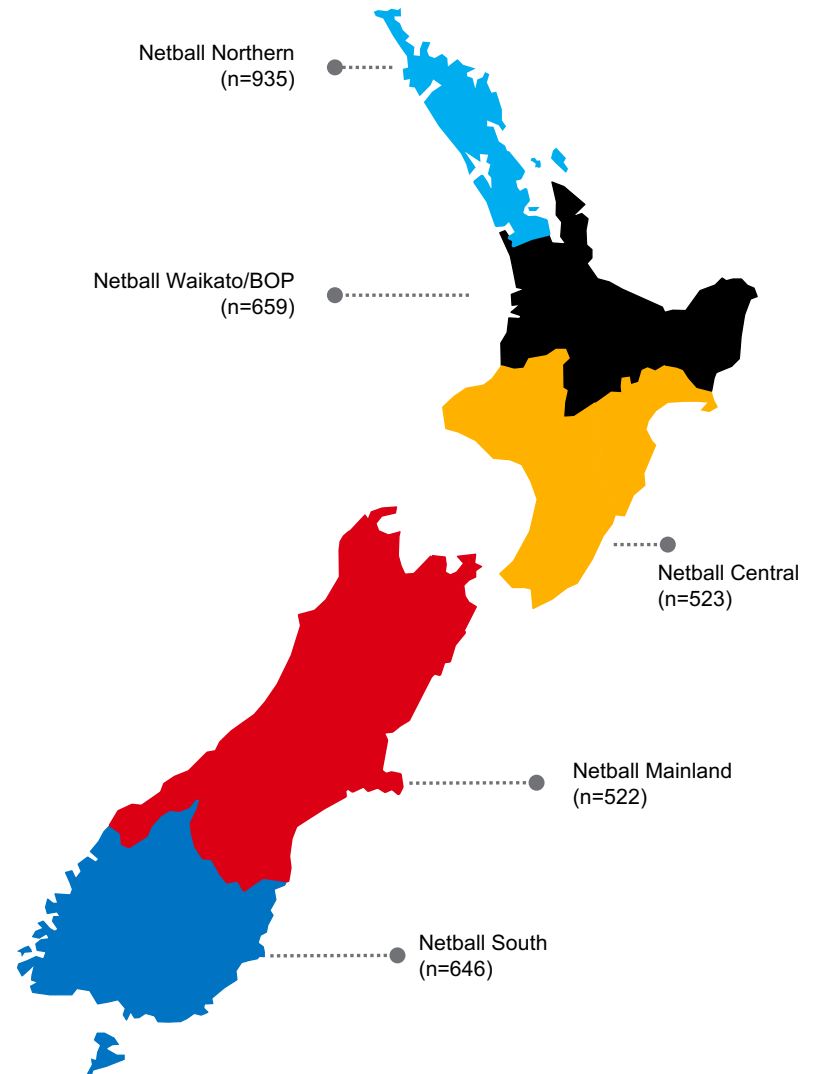
Base: All respondents (Excluding Don't know/not applicable)  
 Q42. Do / Does you/ your child use the NetballSmart Dynamic Warm-Up in your/ their warm up...  
 Base: Those who don't always use NetballSmart in their warm ups before games (n=1,392)  
 Q58. For what reason or reasons do/does you/ your child not warm up prior to a game...

▲ ▼ Significantly higher/lower than Total Netball 2018

# DIFFERENCES ACROSS ZONES

# HOW DOES EXPERIENCE DIFFER BETWEEN ZONES?

Results are analysed across the following five Zones:





# RESPONDENTS FROM NETBALL MAINLAND ARE MOST SATISFIED WITH THEIR CENTRE EXPERIENCE

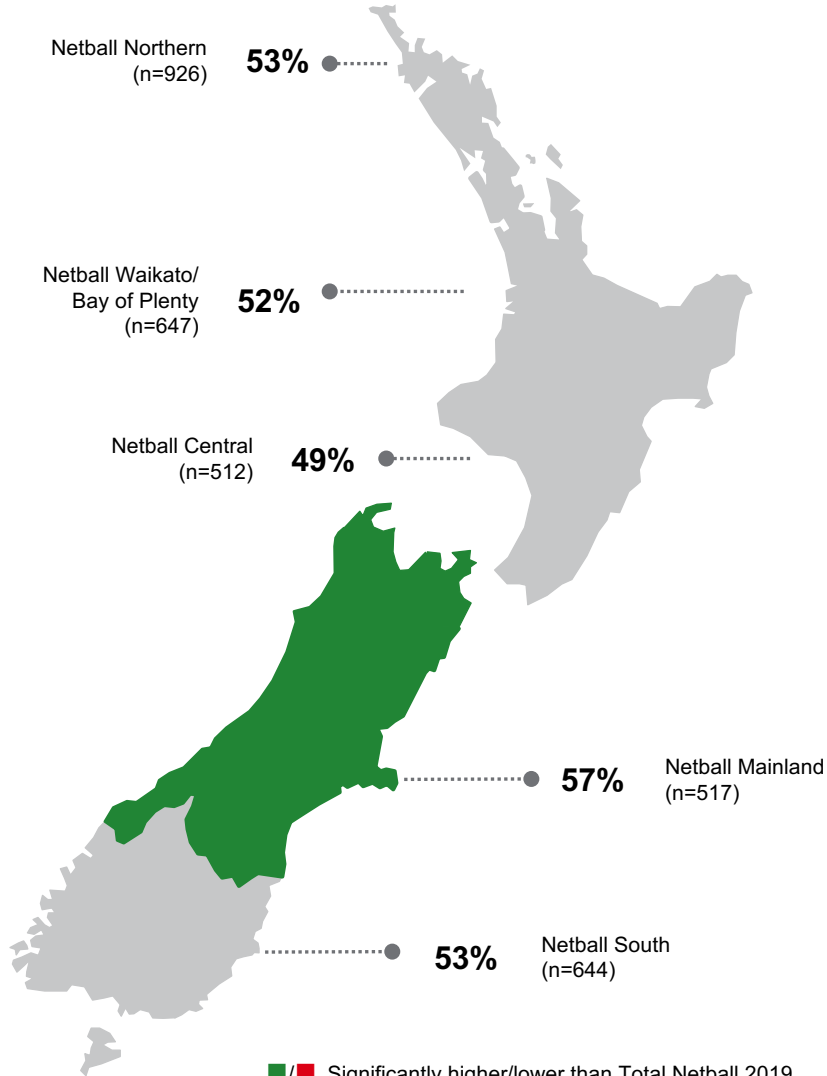
## OVERALL SATISFACTION

(% more than satisfied)

TOTAL 2019  
**53%▲**

### HOW DOES THIS COMPARE WITH 2018 AND 2016?

SATISFACTION	2019 (n=3,375)	2018 (n=2,866)	2016 (n=1,519)
Northern (n=926)	53%▲	53%	45%
Waikato BOP (n=647)	52%▲▲	35%	39%
Central (n=512)	49%▲	38%	42%
Mainland (n=517)	57%▲	51%	53%
South (n=644)	53%	49%	52%



■/■ Significantly higher/lower than Total Netball 2019  
▲▼ Significantly higher/lower than sub-group 2018  
▲▼ Significantly higher/lower than sub-group 2016

Base: All respondents (Excluding Don't know/not applicable) (n=3,375)  
Q6. To what extent are you satisfied or dissatisfied with the/ your child's overall experience of playing netball at your/ their centre?  
Note: Zones are based on the centre selected at Q2a in the questionnaire



# RESPONDENTS FROM NETBALL MAINLAND ARE MOST LIKELY TO RECOMMEND THEIR NETBALL CENTRES

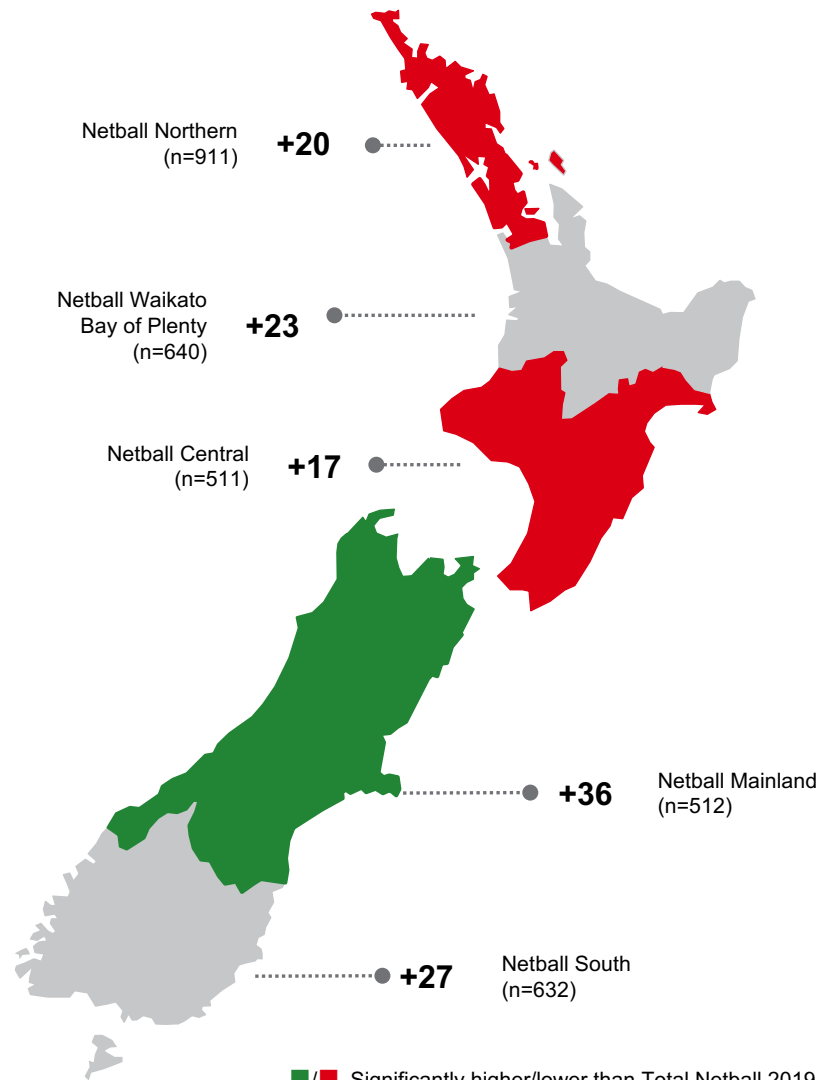
NPS

(% promoters minus % detractors)

TOTAL 2019  
**+25 ▲**

HOW DOES THIS COMPARE WITH 2018 AND 2016?

SATISFACTION	2019 (n=3,331)	2018 (n=2,847)	2016 (n=1,511)
Northern (n=911)	+20▲	+19	+10
Waikato BOP (n=640)	+23▲▲	-11	-9
Central (n=511)	+17▲▲	-6	-2
Mainland (n=512)	+36▲▲	+22	+22
South (n=632)	+27▲	+21	+25



Base: All respondents (Excluding Don't know/not applicable) (n=3,331)

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

Note: Zones are based on the centre selected at Q2a in the questionnaire

- /■ Significantly higher/lower than Total Netball 2019
- ▲▼ Significantly higher/lower than sub-group 2018
- ▲▼ Significantly higher/lower than sub-group 2016

# RESPONDENTS FROM NETBALL CENTRAL ARE LEAST LIKELY TO PERCEIVE VALUE FOR MONEY

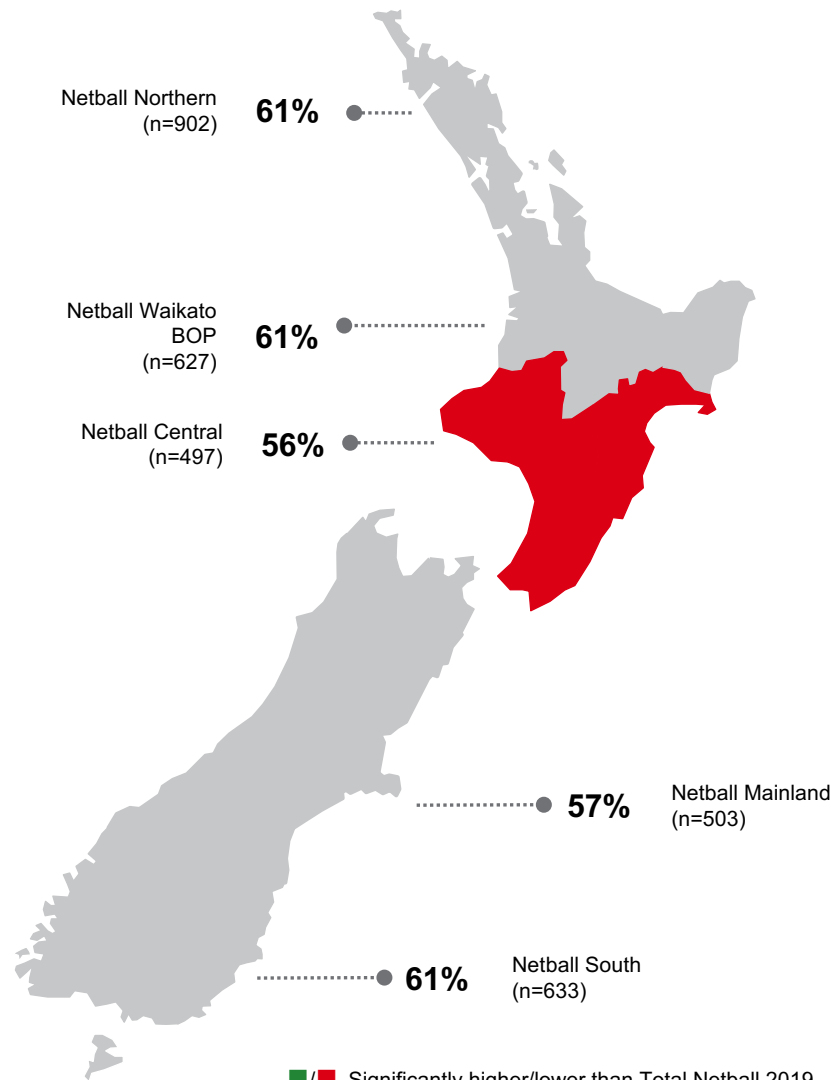
## VALUE FOR MONEY

(% agree or strongly agree)

TOTAL 2019  
**60%** ▲

### HOW DOES THIS COMPARE WITH 2018 AND 2016?

SATISFACTION	2019 (n=3,286)	2018 (n=2,811)	2016 (n=1,501)
Northern (n=902)	61%	60%	58%
Waikato BOP (n=627)	61%▲▲	46%	48%
Central (n=497)	56%▲	50%	46%
Mainland (n=503)	57%	53%	62%
South (n=633)	61%	57%	59%



Base: All respondents (Excluding Don't know/not applicable) (n=3286)

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

Note: Zones are based on the centre selected at Q2a in the questionnaire

- /■ Significantly higher/lower than Total Netball 2019
- ▲▼ Significantly higher/lower than sub-group 2018
- ▲▼ Significantly higher/lower than sub-group 2016

# THOSE FROM NETBALL SOUTH HAVE THE HIGHEST LIKELIHOOD TO REJOIN NEXT SEASON

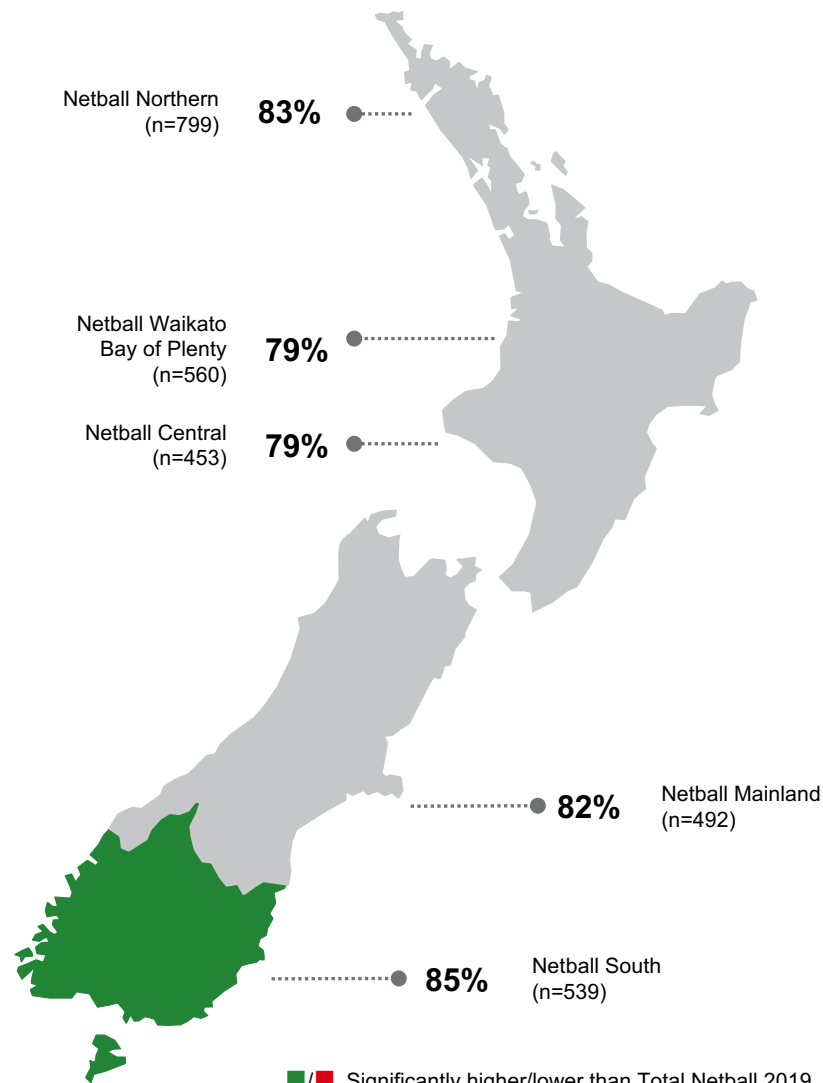
## LIKELIHOOD TO REJOIN

(% likely or very likely)

TOTAL 2019  
**82%** ▲

### HOW DOES THIS COMPARE WITH 2018 AND 2016?

SATISFACTION	2019 (n=2,926)	2018 (n=2,559)	2016 (n=1,448)
Northern (n=799)	83%▲	82%	76%
Waikato BOP (n=560)	79%▲	72%	74%
Central (n=453)	79%	75%	77%
Mainland (n=492)	82%	80%	83%
South (n=539)	85%▲	79%	84%



■/■ Significantly higher/lower than Total Netball 2019  
▲▼ Significantly higher/lower than sub-group 2018  
▲▼ Significantly higher/lower than sub-group 2016

Base: All respondents who are members (Excluding Don't know/not applicable) (n=2926)  
Q9. How likely are/ is you/ your child to play netball for or rejoin <insert centre from Q2a> next season?  
Note: Zones are based on the centre selected at Q2a in the questionnaire

# RESULTS ARE CONSISTENT ACROSS ZONES FOR SATISFACTION WITH THE CENTRE JOINING PROCESS

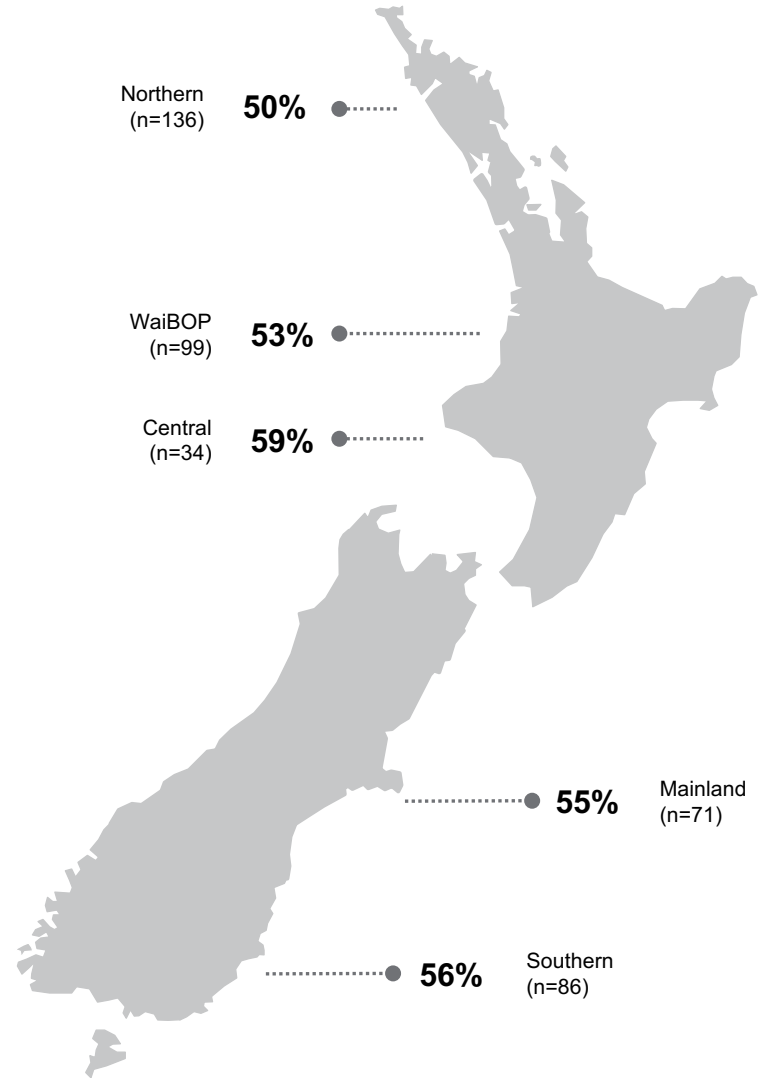
## JOINING PROCESS

(% agree or strongly agree)

**TOTAL 2019**  
**53%**

### HOW DOES THIS COMPARE WITH LAST YEAR?\*

SATISFACTION	2019 (n=451)	2018 (n=360)
Northern (n=136)	50%	48%
WaiBOP (n=99)	53%	38%
Central (n=34)	59%	53%
Mainland (n=71)	55%	53%
South (n=86)	56%	54%



Base: All respondents who are new members (Excluding Don't know/not applicable) (n=451) Q20 (R6). Thinking about the process you/ you and your child went through when you/ your child joined your/ their netball centre. How satisfied are you with your/ their netball centre on the following... The overall process of joining the centre

Note: Zones are based on the centre the respondent selected in the questionnaire at Q2a

\* Note a change in metric in 2018

■/■ Significantly higher/lower than Total Netball 2019  
▲▼ Significantly higher/lower than sub-group 2018


# REASON FOR BELONGING TO A CENTRE

REASON FOR BELONGING	TOTAL (n=2,994)	Northern (n=815)	WaiBOP (n=577)	Central (n=466)	Mainland (n=505)	South (n=548)
To play competitively	35%	37%	36%	32%	31%	38%
To have fun / To play socially	29%	27%	27%	32%	34%	29%
To learn/ improve skills	17%	17%	16%	14%	17%	16%
To get fit and healthy	8%	7%	8%	9%	8%	9%
To socialise	4%	3%	3%	3%	4%	4%
To have access to facilities and playing fields/ venues/ courts	2%	3%	2%	2%	1%	1%
Other	6%	6%	7%	9%	5%	3%

Base: All respondents who are members (n=2994)

Q4. What is the **main** reason you/ your child belong/ belongs to a netball centre?

Note: Zones are based on the centre selected at Q2a in the questionnaire

  Significantly higher/lower than Total Netball 2019

# SATISFACTION ACROSS ZONES: MORE THAN SATISFIED WITH KEY DRIVERS

KEY DRIVERS (% more than satisfied)	TOTAL (n=3,000-3,389)	Northern (n=793-928)	WaiBOP (n=568-652)	Central (n=458-520)	Mainland (n=473-521)	South (n=585-642)
Having well maintained playing/ training venues/ fields/ courts	60%	65%	52%	58%	56%	66%
Being friendly and welcoming	59%	57%	57%	57%	63%	59%
The quality of the coaches or instructors	57%	55%	55%	56%	62%	58%
Being professional and well managed	57%	59%	54%	52%	59%	59%
Having clean and well maintained facilities	56%	54%	47%	54%	56%	70%
Providing me/ them the information I/ they need when I/ they need it	54%	54%	55%	50%	57%	52%
The social environment at the centre	54%	53%	50%	50%	56%	59%
Allowing me/ them to fulfil my/ their potential	53%	54%	52%	50%	58%	54%
Is fair and provides equal opportunities for all players	52%	53%	52%	46%	55%	54%

Base: All respondents (Excluding Don't know/not applicable) (n=3,000-3,389)  
Q10a. How would you rate your/ your child's satisfaction with your/ their netball centre on each of the following...  
Note: Zones are based on the centre selected at Q2a in the questionnaire

  Significantly higher/lower than Total Netball 2019

# SATISFACTION ACROSS ZONES: MORE THAN SATISFIED WITH SECONDARY DRIVERS

<b>SECONDARY DRIVERS</b> (% more than satisfied)	<b>TOTAL</b> (n=2,541-3373)	<b>Northern</b> (n=725-929)	<b>WaiBOP</b> (n=529-648)	<b>Central</b> (n=430-513)	<b>Mainland</b> (n=463-516)	<b>South</b> (n=484-638)
Providing a safe environment for adults and children	60%	58%	54%	56%	65%	67%
Encouraging good sportsmanship and fair play	57%	56%	54%	52%	61%	60%
The amount and timeliness of information about competitions and draws	50%	49%	45%	49%	55%	50%
The ease of accessing the centre's venues/ courts for training or casual playing	49%	47%	41%	44%	60%	54%
Engaging with the local community	48%	46%	45%	44%	49%	54%
Being responsive to my/ their needs and requirements	48%	48%	43%	43%	51%	53%
Communicating with you about the coaching, officiating and event opportunities and development provided by Netball NZ	48%	49%	45%	49%	53%	47%
Encouraging good player welfare principles e.g. nutrition & hydration, warm-ups/ cool downs	47%	45%	46%	44%	49%	49%
Providing player development programmes	47%	49%	40%	48%	48%	48%
Having qualified / experienced officials available when I/ they compete	38%	41%	35%	33%	40%	36%

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

Q10b. How would you rate your/ your child's satisfaction with your/ their netball centre on each of the following...

\*Small sample size;

Note: Zones are based on the centre selected at Q2a in the questionnaire

  Significantly higher/lower than Total Netball 2019

# FOCUS FOR IMPROVEMENT (IF FEES INCREASED)

FOCUS FOR IMPROVEMENT	TOTAL (n=2,563)	Northern (n=723)	WaiBOP (n=516)	Central (n=401)	Mainland (n=369)	South (n=470)
Quality of officiating	20%	20%	15%	26%	22%	23%
Player development programmes	19%	20%	19%	14%	18%	21%
Playing/ training venues/ fields/ courts	13%	12%	16%	11%	15%	12%
Facilities e.g. club rooms, changing rooms, toilets	10%	10%	16%	10%	10%	7%
Quality of coaching or instructors	7%	7%	6%	7%	7%	8%
Management of the centre	5%	5%	4%	8%	5%	2%
Communications	3%	2%	3%	4%	4%	4%
Number of coaches or instructors	3%	3%	3%	2%	3%	4%
Social activities	2%	2%	3%	2%	3%	2%
Access to equipment	2%	1%	2%	1%	2%	2%
Other	15%	18%	14%	14%	12%	15%

Base: All respondents (Excluding Don't know/not applicable) (n=2,563)

Q14. If your/ your child's netball centre 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?

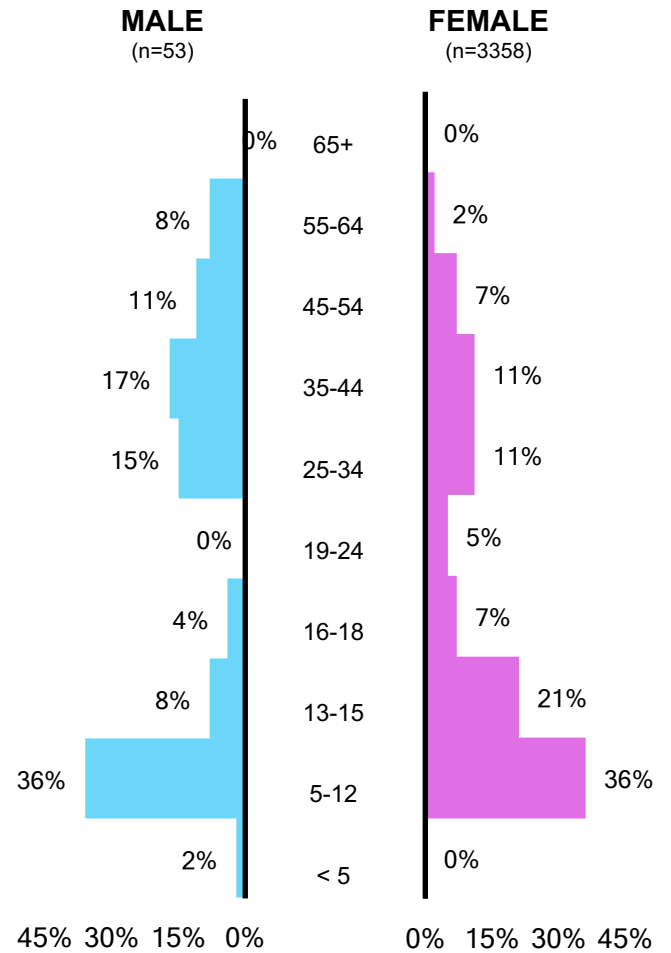
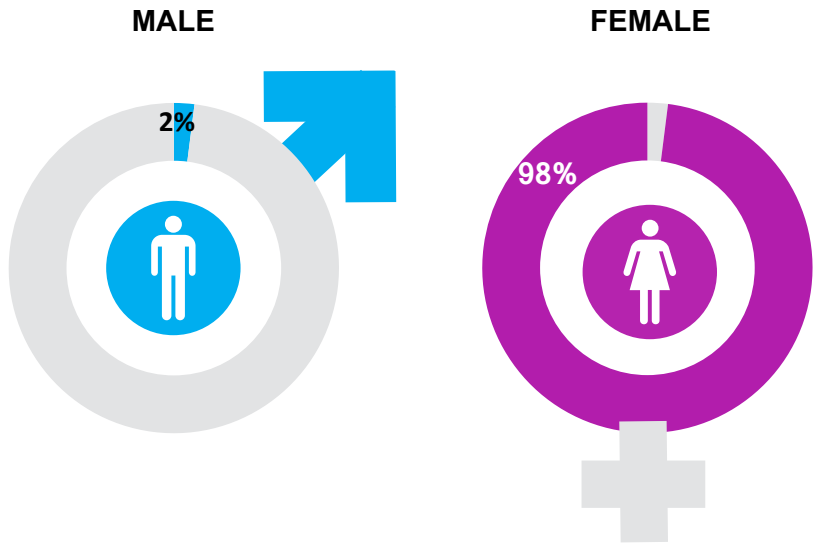
  Significantly higher/lower than Total Netball 2019

Note: Zones are based on the centre selected at Q2a in the questionnaire



# SAMPLE PROFILE

# AGE-GENDER DISTRIBUTION



GENDER (Q25)	TOTAL (n=3414)	PLAYER (n=1724)	PARENT (n=1690)
MALE	2%	2%	1%
FEMALE	98%	98%	99%
GENDER DIVERSE	-	-	-

PERCENTAGE IN EACH AGE GROUP

# AGE

AGE (Q22)	TOTAL 2019 (n=3414)	TOTAL 2018 (n=2895)	ALL SPORTS 2018/19 (n=30,081)
Less than 5 years	0%	0%	1%
NET 5-12 years	36%	37%	32%
NET 13-18 years	28%	26%	17%
NET 19-24 years	5%	5%	5%
25-34 years	11%	10%	9%
35-44 years	12%	12%	9%
45-54 years	7%	7%	10%
55-64 years	2%	2%	8%
65+ years	0%	0%	9%

# ETHNICITY

ETHNICITY (Q34)	TOTAL 2019 (n=3414)	TOTAL 2018 (n=2895)	ALL SPORTS 2018/19 (n=30,081)
<b>NET European/Pakeha</b>	<b>81%</b>	82%	77%
<b>Māori</b>	<b>24%</b>	23%	17%
<b>NET Pasifika</b>	<b>8%</b>	7%	8%
Samoan	<b>4%</b>	4%	4%
<b>NET Asian &amp; Indian</b>	<b>3%</b>	3%	8%
Chinese	<b>1%</b>	1%	3%
Indian	<b>1%</b>	1%	3%
<b>Other</b>	<b>3%</b>	3%	4%

Note: Respondents can identify with more than one ethnicity. Only ethnicities greater than 1% are shown.

# REGION OF RESIDENCE

REGION (Q23)	TOTAL 2019 (n=3414)	TOTAL 2018 (n=2895)	ALL SPORTS 2018/19 (n=30,081)
Northland	3%	7%	3%
Auckland	26%	30%	29%
Waikato	12%	7%	9%
Bay of Plenty	7%	2%	7%
Gisborne	1%	-	1%
Hawkes Bay	1%	2%	4%
Taranaki	3%	-	2%
Manawatu	1%	2%	4%
Whanganui	-	1%	1%
Wellington-Wairarapa	11%	8%	10%
Tasman	2%	3%	1%
Nelson	-	5%	2%
Marlborough	-	1%	1%
West Coast	-	1%	-
Canterbury	14%	16%	17%
Otago	13%	9%	7%
Southland	7%	4%	2%
Outside of New Zealand	-	-	-

# ROLE AT CENTRE & MEMBERSHIP TENURE

ROLE (Q67)	TOTAL 2019 (n=3414)	TOTAL 2018 (n=2895)
Playing member	82%	84%
Non-playing member	6%	6%
Casual player	4%	4%
Play at events only	4%	3%
Other	3%	2%

MEMBERSHIP TENURE^ (Q3)	TOTAL 2019 (n=2994)	TOTAL 2018 (n=2612)	ALL SPORTS 2018/19 (n=28,205)
Less than 1 year	16%	14%	19%
1-2 years	14%	14%	19%
3-5 years	34%	34%	29%
6-10 years	20%	19%	14%
More than 10 years	15%	18%	19%

^ Asked only of those who are members

# COMPETITIVE LEVEL & PLAYING FREQUENCY

COMPETITIVE LEVEL (Q28)	TOTAL 2019 (n=2,994)	TOTAL 2018 (n=2,612)	ALL SPORTS 2018/19 (n=28,205)
Played for the top team at my centre	20%	24%	26%
Been selected to represent my centre at a regional event/ competition	12%	14%	18%
Been selected to represent my region at a national event/ competition	6%	5%	14%
Been selected to represent New Zealand at an international event/ competition	0%	1%	2%
None of these	75%	70%	61%

FREQUENCY OF PLAYING/ TRAINING (Q5)	TOTAL 2019 (n=3,414)	TOTAL 2018 (n=2,895)	ALL SPORTS 2018/19 (n=30,081)
Less than once a week / month	2%	1%	3%
Once a week / month	17%	20%	22%
Two or three times a week / month	68%	64%	48%
Four or five times a week / month	11%	11%	12%
6 or more times a week / month	1%	2%	12%
Other	2%	2%	3%

# ZONE

<b>Zone</b>	<b>N=</b>	<b>TOTAL 2019 (n=3,414)</b>	<b>TOTAL 2018 (n=2,895)</b>
<b>Northern</b>	<b>935</b>	<b>27%</b>	<b>37%</b>
<b>Waikato BOP</b>	<b>659</b>	<b>19%</b>	<b>10%</b>
<b>Central</b>	<b>523</b>	<b>15%</b>	<b>13%</b>
<b>Mainland</b>	<b>522</b>	<b>15%</b>	<b>25%</b>
<b>South</b>	<b>646</b>	<b>19%</b>	<b>13%</b>



# 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/centre.

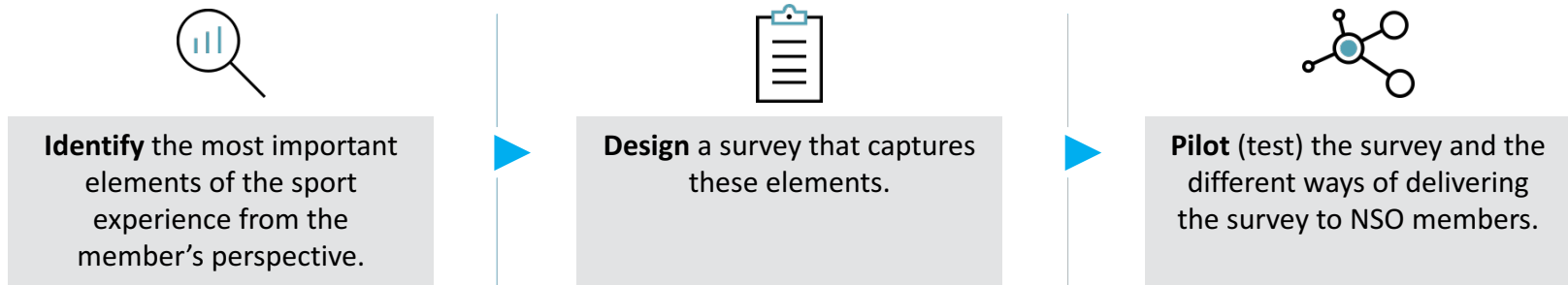
In future, the programme may also roll out to cover events/ tournaments, RSTs/RSDs, TAs/ Councils, activities and even children doing sport at school.

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 Football.
- ▶ Subsequently, in consultation with Sport NZ and NSOs, Nielsen reviewed the survey tools and created a Survey Guide.

Results from NSOs surveyed in winter 2018 and summer 2019 have been combined to create results for the 2018/19 year. Sports surveyed in 2018/19 were; rugby league, netball, badminton, hockey, futsal, rugby (winter), cricket, touch rugby, tennis and golf (summer).

# METHODOLOGY OF VOP NETBALL SURVEY 2019

## SAMPLE



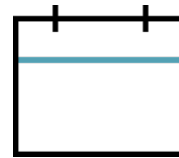
Netball New Zealand opted to send the survey via an open link, meaning that NNZ did not supply a database to Nielsen.

## APPROACH



The open link was supplied to NNZ to distribute to centres and via their own communication channels e.g. Facebook, newsletters etc.

## FIELDWORK



Fieldwork was conducted between 19 July and 05 August 2019.

## RESULT



A total of 3,414 Netball New Zealand respondents nationwide completed the survey, consisting of 1,724 players and 1,690 parents of players/children under the age of 16.

This gave a maximum margin of error on the Total Netball result of  $\pm 1.7\%$ .

# 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 Netball 2018
- ▲ / ▼ The sub-group is significantly higher / lower than the Total Netball 2016
- / □ The Total Netball result is significantly higher / lower than the total for All Sports 2018/19

## TOTAL

When comparing results, 'cf.' is used as an abbreviation of 'compare'. When comparing with the total, 'All Sports 2018/19' is used. This is the total sample from 2018/19 i.e. an average of the sports that participated in winter 2018 and summer 2019. Netball respondents consist of 50% players and 50% parent of players responses. All Sports 2018/19 is 60% players and 40% parents of players.

## 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 centre and/or, represented the centre at a regional event/competition, represented the federation at a national event/competition and/or represented New Zealand at an international event/competition.

# APPENDICES



# 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/larger 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 Netball New Zealand. The dependent variable for the regression model is **recommendation** (the likelihood of a respondent to recommend their centre to someone interested in playing netball). The independent variables are the attributes/ drivers in key drivers (Q10a), secondary drivers (Q10b) and value for money (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 centre. 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.

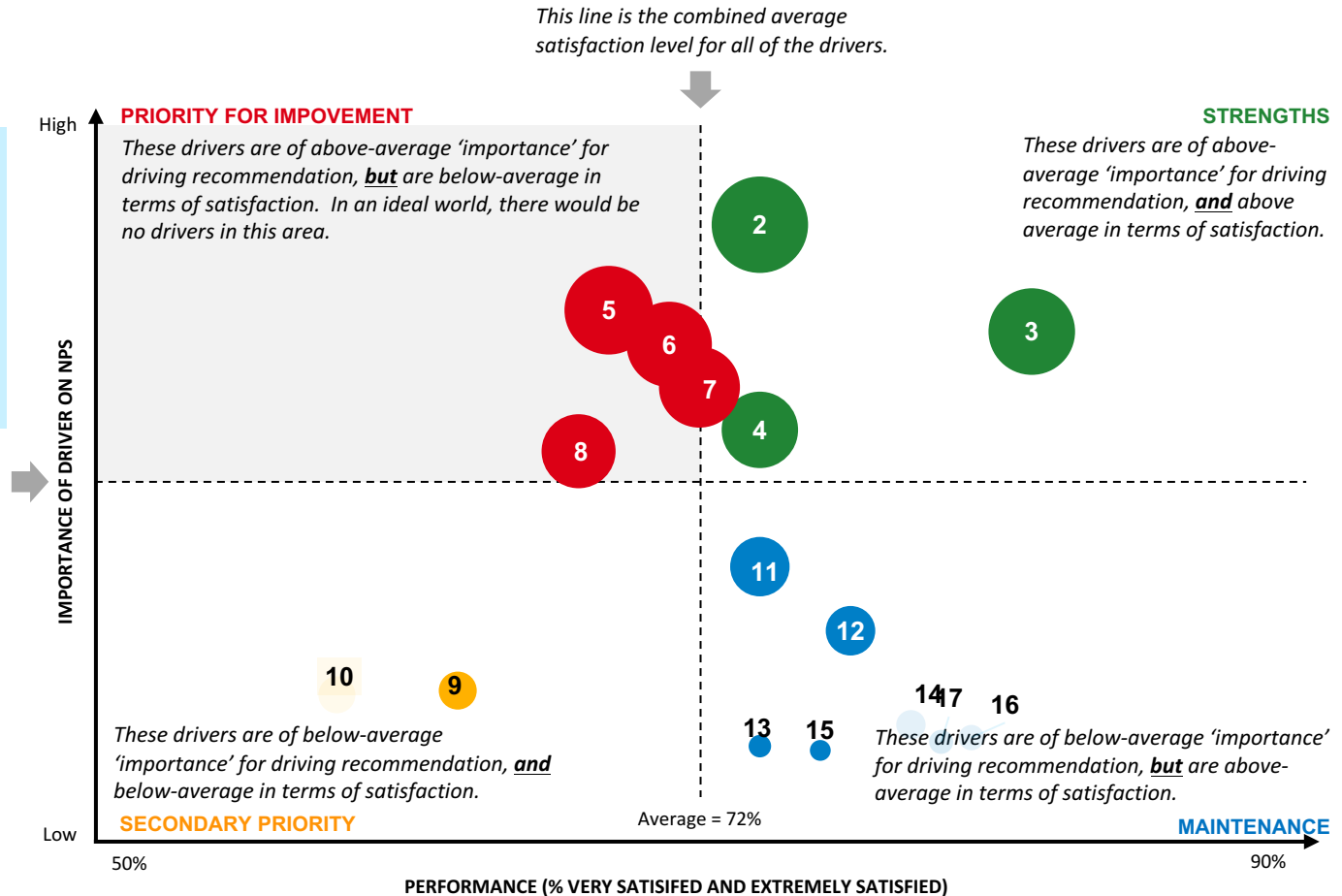
\* **Multi-collinearity** exists whenever an independent variable is highly correlated with one or more of the other independent variables in a multiple regression equation. **Multi-collinearity** is a **problem** because it undermines the statistical significance of an independent variable.



# GUIDANCE ON HOW TO INTERPRET THIS CHART

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

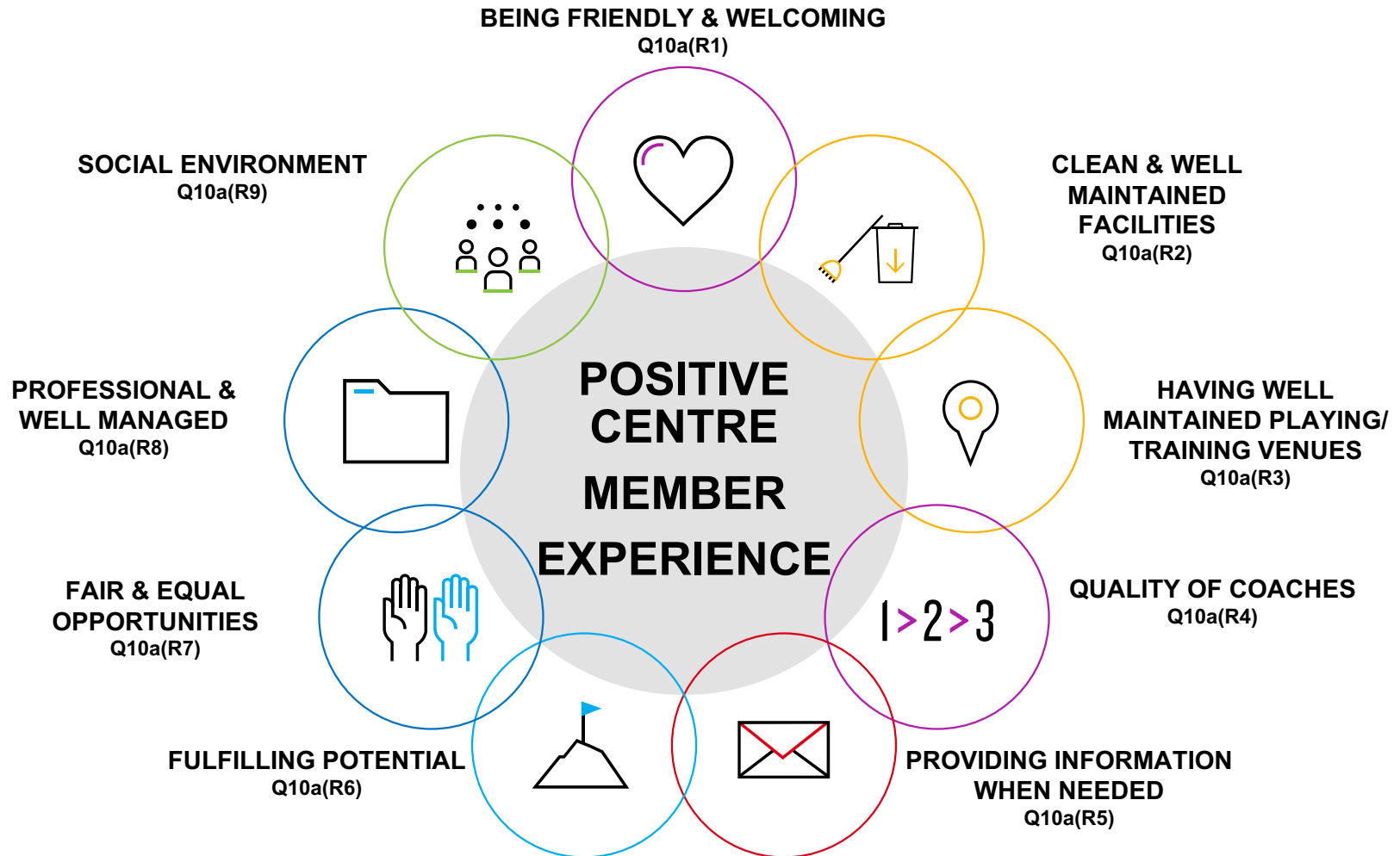
This line represents the average in terms of level of 'importance' for driving recommendation.



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

# DRIVERS OF THE CENTRE EXPERIENCE

The qualitative stage, undertaken as part of the development of the VOP questionnaire, identified seven drivers that influence centre 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 CENTRE EXPERIENCE, CTD.

As well as the nine 'core' drivers of the centre 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 centre venues for training or casual playing (Q10b-R2)
- ▶ 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)

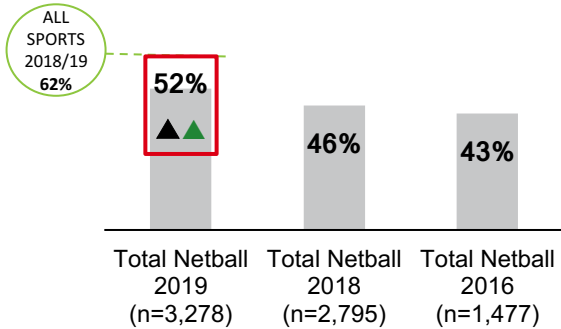
In addition, Netball New Zealand included specific drivers considered important or topical for netball. These include:

- ▶ Communicating with you about the coaching, officiating and event opportunities and development provided by Netball New Zealand (Q10b-R12)
- ▶ Encouraging good player welfare principles e.g. nutrition & hydration, warm-ups/ cooldowns (Q10b-R18)
- ▶ Providing player development programmes (Q10b-R19)
- ▶ The amount and timeliness of information about competitions and draws (Q10b-R22).

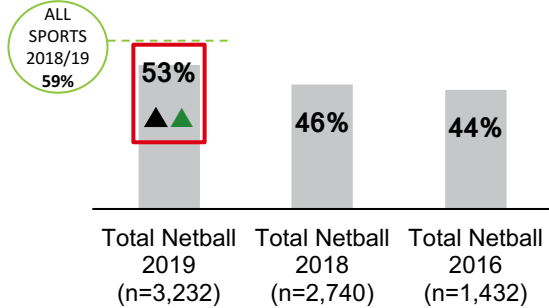
# SATISFACTION WITH DRIVERS BY YEAR

# FULFILLING POTENTIAL

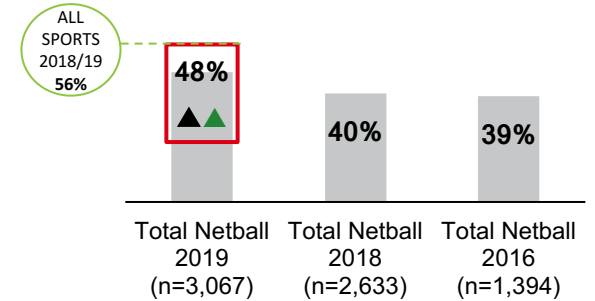
## IS FAIR AND PROVIDES EQUAL OPPORTUNITIES



## ALLOWING ME TO FULFIL MY POTENTIAL



## BEING RESPONSIVE TO MY NEEDS AND REQUIREMENTS



### SUB-GROUP DIFFERENCES

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

- Aged **5-12 years** (58% cf. 52%).

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

- From **Central Netball** (46% cf. 52%)
- **Young adults** (19 to 34 years) (46%) and those aged **13-18 years** (49%)
- Of **Māori** ethnicity (48%)
- **Players** (49%)
- Those who belong to their centre *to play competitively* (49%).

### SUB-GROUP DIFFERENCES

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

- Of **Asian/Indian** ethnicity (65% cf. 53%)
- From **Mainland Netball** (58%).

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

- **Young adults** (19 to 34 years) (48% cf. 53%)
- Of **Māori** ethnicity (49%).

### SUB-GROUP DIFFERENCES

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

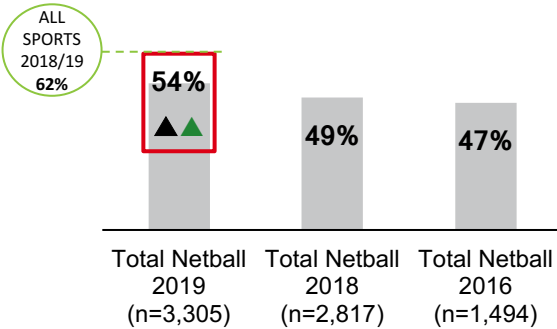
- From **Netball South** (53% cf. 48%)
- Aged **5-12 years** (52%).

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

- **Older adults** (35+ years) (42% cf. 48%)
- From **Waikato/Bay of Plenty Netball** (43%) or **Central Netball** (43%).

# COMMUNICATION

## PROVIDING THE INFORMATION I NEED WHEN I NEED IT



### SUB-GROUP DIFFERENCES

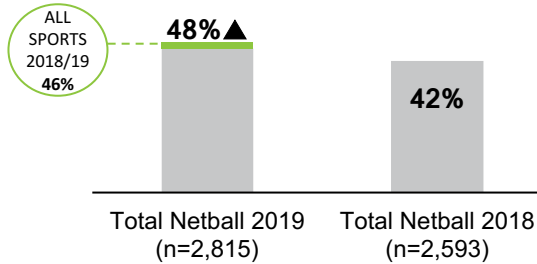
Those *significantly more* likely to be **very or extremely** satisfied are:

- Aged **55-64** (66% cf. 54%) or aged **5-7 years** (64%).

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

- **Young adults** (19 to 34 years) (50% cf. 54%)
- From **Central Netball** (50%)
- Of **Māori** ethnicity (51%).

## COMMUNICATING WITH YOU ABOUT THE COACHING, OFFICIATING AND EVENT OPPORTUNITIES AND DEVELOPMENT PROVIDED BY NETBALL NZ



### SUB-GROUP DIFFERENCES

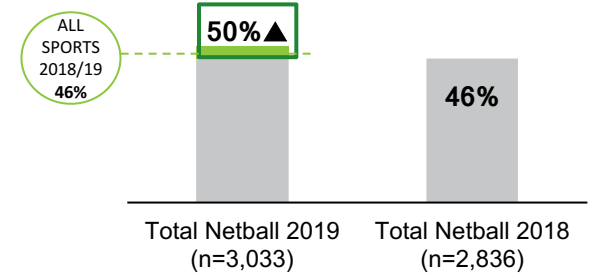
Those *significantly more* likely to be **very or extremely** satisfied are:

- Aged **55-64** (63% cf. 48%) or aged **5-7 years** (61%)
- From **Mainland Netball** (53%).

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

- There are no significant differences.

## THE AMOUNT AND TIMELINESS OF INFORMATION ABOUT COMPETITIONS AND DRAWS



### SUB-GROUP DIFFERENCES

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

- Aged **5-7 years** (60% cf. 50%)
- From **Mainland Netball** (55%).

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

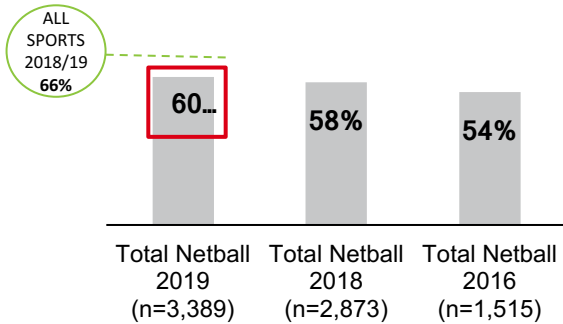
- From **Waikato/Bay of Plenty Netball** (45% cf. 50%).

▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016

□ Significantly higher/lower than All Sports 2018/19

# FACILITIES

## HAVING WELL MAINTAINED PLAYING/ TRAINING VENUES/ COURTS



### SUB-GROUP DIFFERENCES

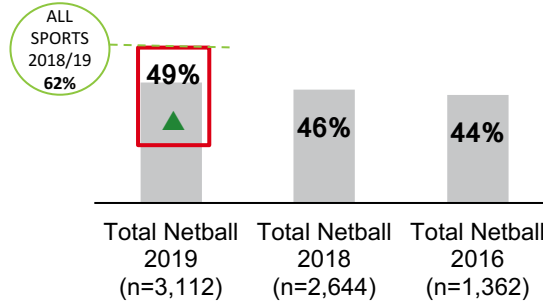
Those *significantly more* likely to be **very or extremely** satisfied are:

- From **Netball South** (66% cf. 60%) or **Northern Netball** (65%)
- Aged **5-12 years** (65%) or **13-18 years** (64%)
- **Parents of players** (64%).

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

- Those who belong to their centre **to socialise** (47% cf. 60%)
- **Young adults** (19-34 years) (51%) and **older adults** (35+ years) (54%)
- Of **Māori** ethnicity (53%)
- **Players** (57%).

## THE EASE OF ACCESSING THE CENTRE'S VENUES/ COURTS FOR TRAINING OR CASUAL PLAYING



### SUB-GROUP DIFFERENCES

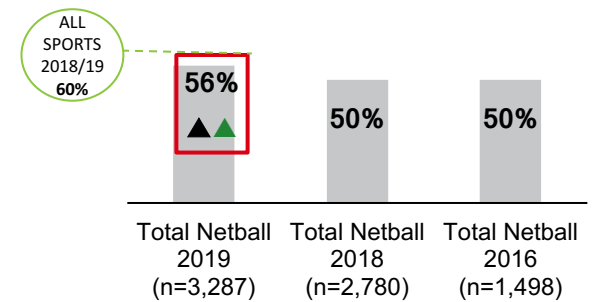
Those *significantly more* likely to be **very or extremely** satisfied are:

- Aged **5-7 years** (63% cf. 49%) or **16-18 years** (56%)
- From **Mainland Netball** (60%) or **Netball South** (54%).

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

- From **Waikato/Bay of Plenty Netball** (41% cf. 49%) or **Central Netball** (44%)
- Aged **11-12 years** (44%).

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



### SUB-GROUP DIFFERENCES

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

- Aged **18-19 years** (71% cf. 56%), **16-17 years** (66%) or **5-7 years** (66%)
- From **Netball South** (70%).

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

- Those who belong to their centre **to socialise** (44% cf. 56%)
- From **Waikato/Bay of Plenty Netball** (47%)
- Aged **11-12 years** (52%)
- Of **Māori** ethnicity (53%).

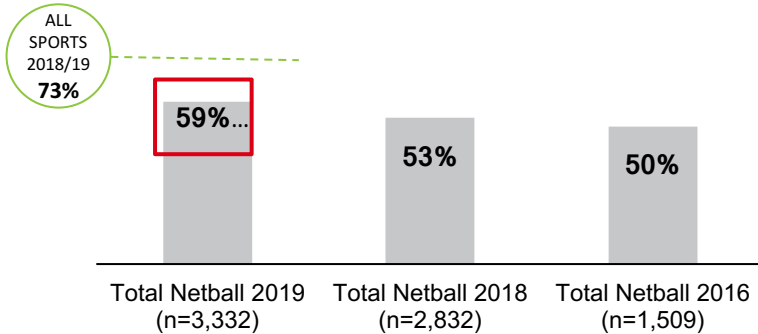
▲▼ Significantly higher/lower than Total Netball 2018  
▲▼ Significantly higher/lower than Total Netball 2016

□ Significantly higher/lower than All Sports 2018/19

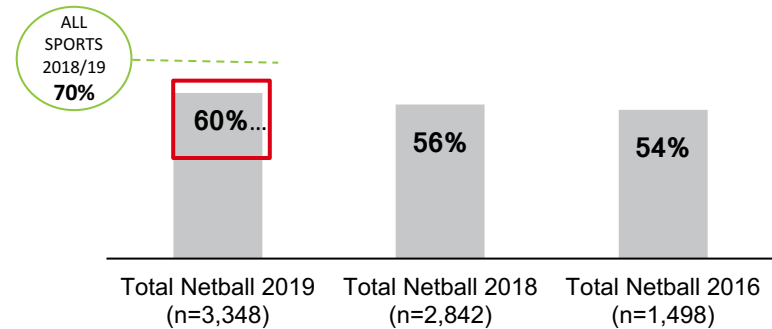


# FRIENDLY AND WELCOMING

## BEING FRIENDLY AND WELCOMING



## PROVIDING A SAFE ENVIRONMENT FOR ADULTS AND CHILDREN



### SUB-GROUP DIFFERENCES

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

- Of **Indian** ethnicity (76% cf. 59%)
- Aged **5-7 years** (71%).

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

- Of **Māori** ethnicity (55% cf. 59%).

### SUB-GROUP DIFFERENCES

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

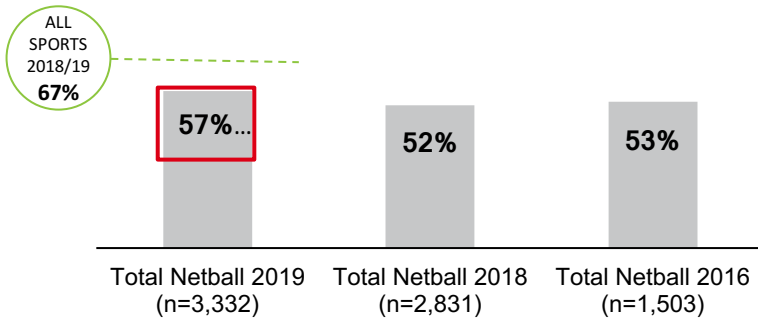
- Aged **55-64 years** (83% cf. 60%), **5-7 years** (72%) or **18-19 years** (71%)
- From **Netball South** (67%) or **Mainland Netball** (65%).

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

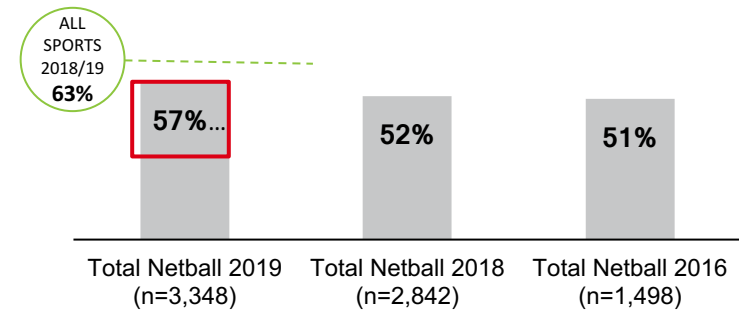
- Those who belong to their **centre to have access to facilities and playing courts** (44% cf. 60%)
- Of **Māori** ethnicity (55%)
- From **Waikato/Bay of Plenty Netball** (54%) or **Central Netball** (56%)
- **Young adults** (19 to 34 years) (56%).

# PROFESSIONAL AND WELL MANAGED

## ENCOURAGING GOOD SPORTSMANSHIP AND FAIR PLAY



## BEING PROFESSIONAL AND WELL MANAGED



### SUB-GROUP DIFFERENCES

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

- Aged **55-64 years** (69% cf. 57%) or aged **5-12 years** (62%)
- From **Mainland Netball** (61%) or **Netball South** (60%).

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

- **Young adults** (19 to 34 years) (51% cf. 57%) and aged **13 to 18 years** (53%)
- From **Central Netball** (52%)
- Of **Māori** ethnicity (52%).

### SUB-GROUP DIFFERENCES

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

- Aged **5-12 years** (63% cf. 57%).

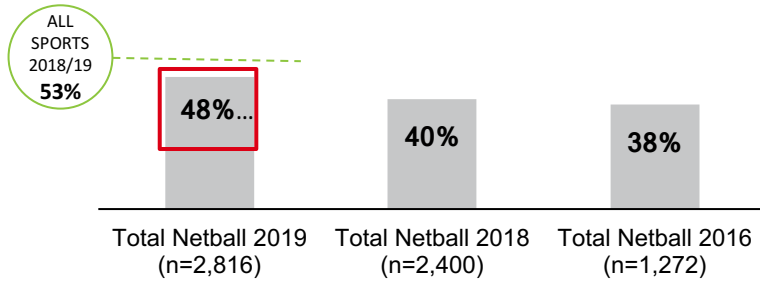
Those *significantly less* likely to be **very or extremely** satisfied are:

- **Young adults** (19 to 34 years) (50% cf. 57%) and **older adults** (35+ years) (52%)
- Of **Māori** ethnicity (51%)
- From **Central Netball** (52%)
- **Players** (54%).

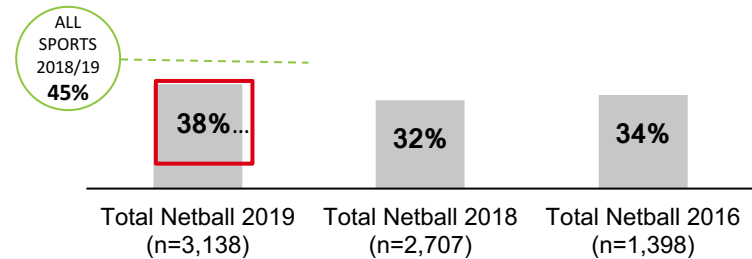
▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016  
 □□ Significantly higher/lower than All Sports 2018/19

# ENGAGEMENT AND OFFICIALS

## ENGAGING WITH THE LOCAL COMMUNITY



## HAVING QUALIFIED/ EXPERIENCED OFFICIALS AVAILABLE



### SUB-GROUP DIFFERENCES

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

- Those **aged 55-64 years** (73% cf. 48%) or **5-7 years** (67%)
- From **Netball South** (54%).

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

- Of **Pasifika** (41% cf. 48%) or **Māori** (43%) ethnicities
- Aged **25-34 years** (42%).

### SUB-GROUP DIFFERENCES

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

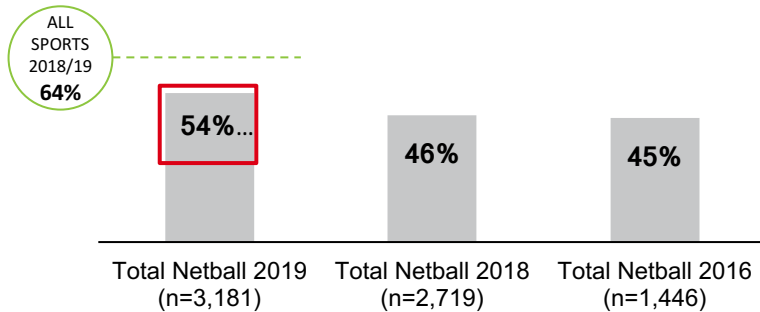
- Of **Asian/Indian** ethnicity (49% cf. 38%)
- Aged **5-12 years** (42%).

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

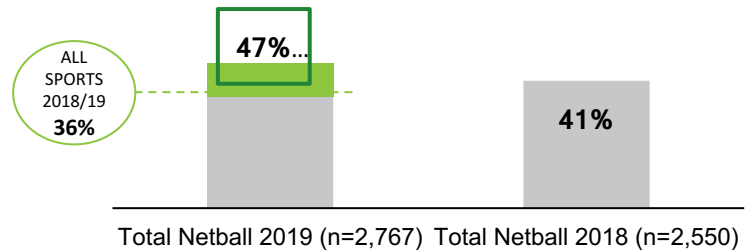
- **Young adults** (19 to 34 years) (30% cf. 38%) and **older adults** (35+ years) (34%)
- From **Central Netball** (33%)
- **Māori** (33%)
- **Players** (36%).

# CENTRE ENVIRONMENT

## THE SOCIAL ENVIRONMENT AT THE CENTRE



## ENCOURAGING GOOD PLAYER WELFARE PRINCIPLES



### SUB-GROUP DIFFERENCES

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

- Of **Indian** ethnicity (70% cf. 54%)
- Aged **5-7 years** (69%) or **16-18 years** (62%)
- From **Netball South** (59%).

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

- Aged **25 to 34 years** (49% cf. 54%) and **35+ years** (49%)
- From **Waikato/Bay of Plenty Netball** (50%)
- Of **Māori** ethnicity (50%).

### SUB-GROUP DIFFERENCES

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

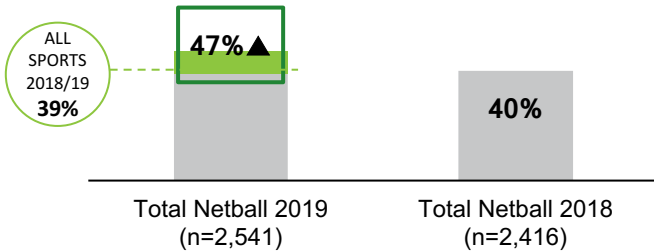
- Aged **5-12 years** (53% cf. 47%)
- **Parents of players** (50%).

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

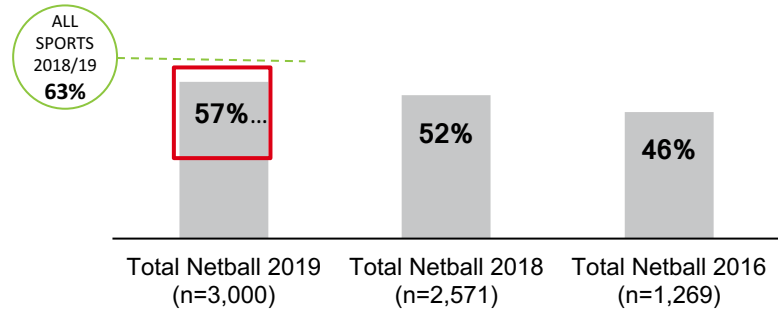
- **Young adults** (19 to 34 years) (39% cf. 47%) and **older adults** (35+ years) (42%)
- **Players** (44%).

# PLAYER DEVELOPMENT

## PROVIDING PLAYER DEVELOPMENT PROGRAMMES



## THE QUALITY OF THE COACHES OR INSTRUCTORS



### SUB-GROUP DIFFERENCES

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

- Aged **55-64 years** (62% cf. 47%) or **5-7 years** (60%).

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

- From **Waikato/Bay of Plenty Netball** (40%)
- **Young adults** (19 to 34 years) (42%) and aged **13-15 years** (43%)
- Those who belong to **play competitively** (43%).

### SUB-GROUP DIFFERENCES

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

- Of **Asian or Indian** ethnicity (71% cf. 57%)
- Aged **5-12 years** (63%)
- From **Mainland Netball** (62%)
- **Parents of players** (60%).

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

- Of **Māori** ethnicity (49% cf. 57%)
- **Young adults** (19 to 34 years) (50%) and **older adults** (35+) (51%)
- **Players** (54%)
- Those who belong to **play competitively** (54%).

▲▼ Significantly higher/lower than Total Netball 2018  
 ▲▼ Significantly higher/lower than Total Netball 2016  
 □ Significantly higher/lower than All Sports 2018/19

