



YMCA VOP RESEARCH REPORT

AUGUST 2019



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INTRODUCTION

This report looks at the results for YMCA to understand the experience of their participants in 2019. 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 first time YMCA has been included in this programme of research.

More than 9,000 YMCA users had the opportunity to participate. Typically, adults aged 16+ complete the questionnaire themselves (‘participants’) and parents/guardians (‘parents’) complete the questionnaire for children under the age of 16, on behalf of their child. The proportion of participant and parent respondents in 2019 is 19% participants and 81% parents.

In this first measure, only the following activities have been included:

- After school care
- Before school care
- Outdoor recreation - Activities that take place outdoors e.g. nature walks, high ropes, sailing, kayaking, team building, etc.
- Holiday programmes - Outdoor activities held during the school holidays e.g. arts, crafts, games, sports, swimming, mountain biking, etc.
- Camps - Camping trips for schools, families, community or church groups as well as leadership and business retreats.
- Youth leadership - Programmes that develop leadership skills and sense of community.
- Indoor recreation - A class or activity that is held at the YMCA and instructed by YMCA staff e.g. kindy gym, climbing, dance, gymnastics, basketball, squash, badminton, etc.

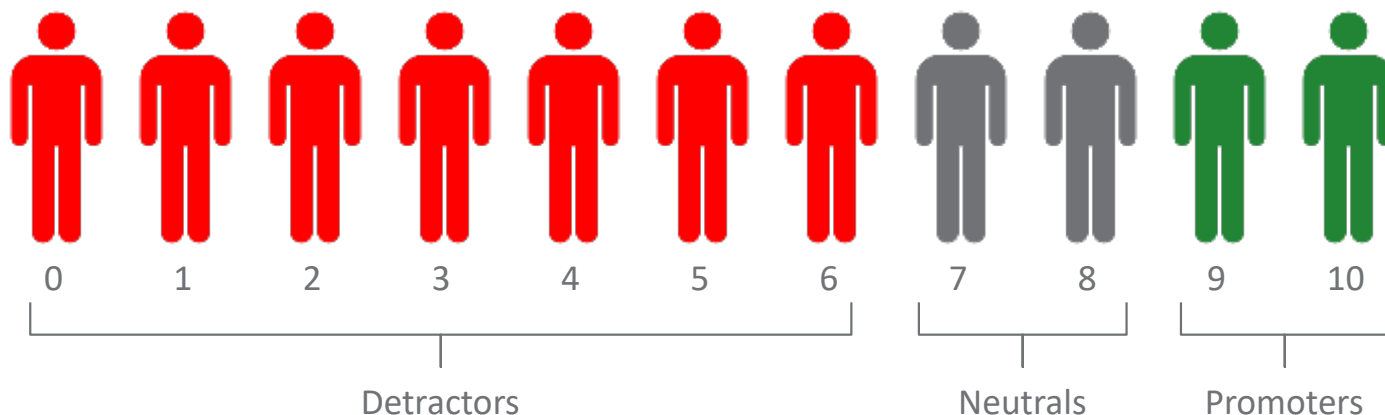
Each respondent was asked to select which activities they/their children participate in. If a respondent participated in more than one activity, an activity was automatically selected for them based on the ‘least selected’ activity; and they were asked about that activity for the rest of the survey. If a respondent had only participated in one activity, they completed the remainder of the survey about that activity.

MEASURES USED IN THIS REPORT

NPS

Net Promoter Score (NPS) is based on a question that asks how likely a respondent is to recommend the activity they currently participate in.

Those who score 0-6 are considered **Detractors**, 7-8 are considered **Neutrals**, and 9-10 are considered **Promoters**.



NPS is calculated by subtracting the % of Detractors from the % of Promoters, and is expressed as a number (see below):

$$\text{\% Promoters} - \text{\% Detractors} = \text{NPS}$$

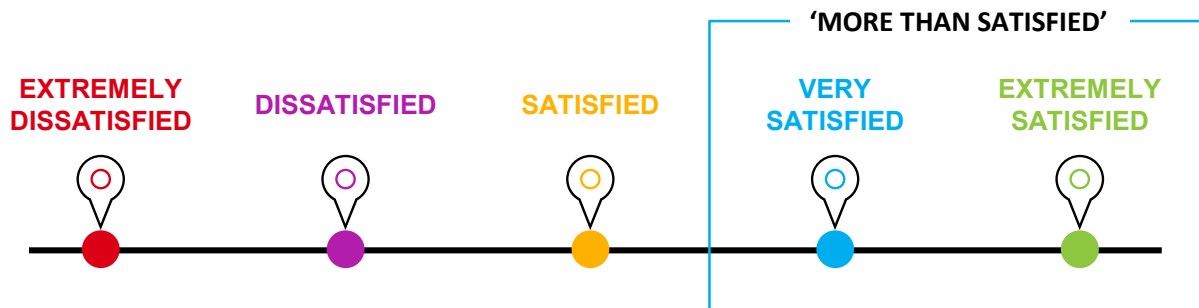
For example:

$$50\% - 30\% = 20$$

MEASURES USED IN THIS REPORT

Satisfaction scale

When level of satisfaction is referenced in this report (i.e. the percentage who are 'more than satisfied'), we use the top two results ('very satisfied' or 'extremely satisfied') of a positively skewed satisfaction scale (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 today's competitive world, is good... good enough? Good (or just satisfied) does not necessarily build strong relationships. We want users to rate their experience more than just satisfied, so they are real advocates and positively endorse their YMCA.

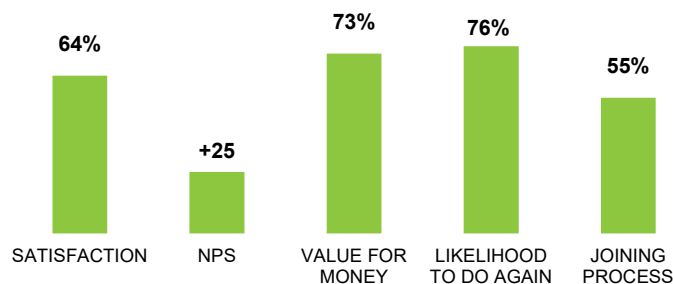
SNAPSHOT OF RESPONDENTS' EXPERIENCES

SAMPLE OVERVIEW

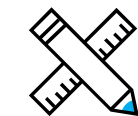
No. of respondents: n= 798
n= 152 Participants (19%)
n= 646 Parents (81%)



KEY METRICS



REASONS FOR BELONGING (TOP 3)



50%
FOR OUT OF
SCHOOL CARE



12%
GET FIT AND
HEALTHY



11%
LEARN &
IMPROVE
SKILLS

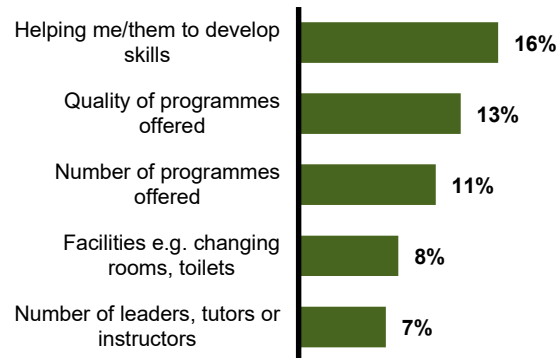


MOST IMPORTANT DRIVERS OF EXPERIENCE TO FOCUS ON



- 1** ENCOURAGING ME/THEM TO FULFIL MY/ THEIR POTENTIAL
62% very/extremely satisfied
- 2** BEING RESPONSIVE TO MY/THEIR NEEDS AND REQUIREMENTS
62% very/extremely satisfied
- 3** FOSTERING A SENSE OF PRIDE AND BELONGING TO MY/THEIR YMCA
60% very/extremely satisfied






ONE ASPECT THEY WANT IMPROVED (IF FEES INCREASED)





EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
KEY METRICS 	SATISFACTION	Two-thirds of respondents are more than satisfied (very or extremely satisfied) with the overall experience of participating in their activity at their YMCA. Only 8% are dissatisfied with their YMCA experience.
	NPS (likelihood to recommend)	Nearly half are very likely to recommend their activity at their YMCA. YMCA's NPS score is +25 in regards to recommending their activity.
	VALUE FOR MONEY	Three-quarters feel they are getting good value for money.
	LIKELIHOOD TO RETURN	Three-quarters of respondents are likely to do their activity again at their YMCA in the next 12 months. A third said they would do another activity at their YMCA in the next 12 months.
DRIVERS OF EXPERIENCE 	<p>The most 'important' drivers of recommendation are:</p> <ol style="list-style-type: none"> 1. <i>The quality of leaders, tutors or instructors</i> 2. <i>Value for money</i> 3. <i>Being professional and well managed</i> <p>All three of the above drivers are considered to be 'strengths' (i.e. above-average 'importance' and above-average for satisfaction).</p> <p>The following are 'priorities for improvement' (i.e. above-average 'importance' but below-average for satisfaction):</p> <ul style="list-style-type: none"> • <i>Allowing me/them to fulfil my/their potential</i> • <i>Being responsive to my/their needs and requirements</i> • <i>Fostering a sense of pride and belonging to my/their YMCA</i> • <i>Providing me/them the information when I/they need it</i> <p>Those who are more than satisfied varies across the drivers from 52% to 87%. Encouragingly, levels of dissatisfaction are relatively low, with those who are dissatisfied/ very dissatisfied ranging between 0% and 7%.</p> <p>'Participants' are more satisfied than 'parents' for the majority of drivers.</p>	

EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
YMCA ENVIRONMENT 	ENVIRONMENT	<p>Four in five (83%) agree their YMCA promotes active and healthy wellbeing.</p> <p>Nine in 10 respondents feel there is a supportive and encouraging environment at their YMCA. In addition, nine in 10 'parents' agree there is an emphasis on fun and enjoyment, and the leader/tutor/instructor supports children to grow confidence.</p>
LOCATIONS 	YMCA LOCATION	<p>Respondents from YMCA Greater Wellington have a significantly higher NPS than the national average, and are more likely to perceive value for money and to do the activity again at their YMCA in the next year.</p> <p>YMCA Christchurch also has positive results, scoring particularly high on overall satisfaction and NPS.</p> <p>Although it has a relatively small sample, YMCA Hawke's Bay scores significantly lower than the overall average in four of the five key metrics.</p>
ACTIVITIES 	YMCA ACTIVITY	<p>Overall, respondents participating in camps and indoor recreation tend to have a positive experience – both of these activities have a significantly higher NPS and perceived value for money compared with the YMCA total. Those participating in camps also have a significantly higher overall satisfaction than the total YMCA result.</p> <p>While there is a relatively small number of respondents participating in youth leadership (meaning caution should be applied when interpreting results), ratings across all key metrics are particularly positive for this activity.</p> <p>Those who attend after school-care are less positive than those participating in other activities. After school-care has a significantly lower overall satisfaction, NPS and perceived value for money when compared with the YMCA total. The perceived value for money for those participating in before-school care is also below the total YMCA result.</p>

EXECUTIVE SUMMARY

	MEASURE	KEY RESULTS
 DEMOGRAPHIC DIFFERENCES 	ETHNICITY	<p>Those who identify as European have a lower NPS than the YMCA total (+22 cf. +25) and those who identify as Asian or Indian have a significantly higher NPS (+42).</p> <p>Those of Asian or Indian ethnicity are also significantly more likely to do their activity again at their YMCA in the next 12 months (85% cf. 76%).</p> <p>There are no significant differences by ethnicity for overall satisfaction, value for money and satisfaction with the joining process.</p>
	AGE	<p>Those aged 13-18 years tend to have a more positive experience with their YMCA, scoring above the YMCA average on overall satisfaction, NPS and value for money.</p> <p>Those aged 8-10 rate overall satisfaction and NPS significantly lower than the total YMCA 2019 average.</p> <p>Similarly, those aged 11-12 years have lower scores for satisfaction, NPS and likelihood to do the activity again at their YMCA.</p>
	GENDER	<p>There are no difference in the key metrics by gender.</p>

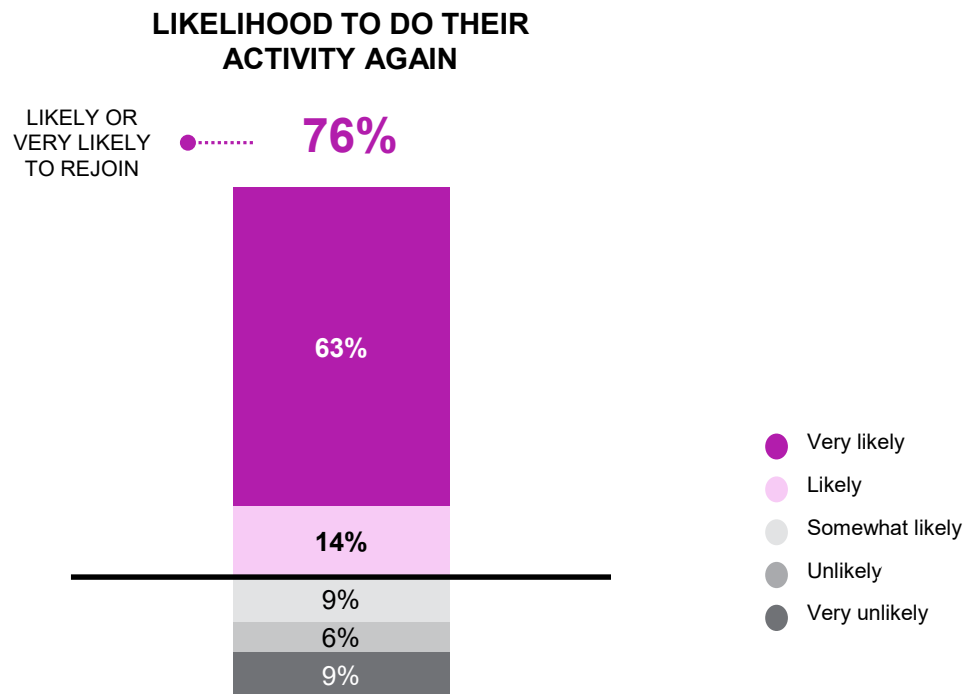
KEY METRICS

KEY METRIC RESULTS

OVERALL, HOW IS THE YMCA PERFORMING?

SATISFACTION	NPS	VALUE FOR MONEY	LIKELIHOOD TO DO AGAIN NEXT 12 MONTHS	JOINING PROCESS
64%	+25	73%	76%	55%
Two-thirds of respondents are more than satisfied (very or extremely satisfied) with the overall experience of participating in their activity at their YMCA.	With an NPS of +25, around half of YMCA participants and parents are likely to recommend their activity (46% are 'promoters' and 21% are 'detractors').	Close to three-quarters feel they get good value for money from their YMCA (opportunities, services and benefits that they receive from their YMCA make it well worth the money they pay).	76% are likely to do the same activity again in the next 12 months, while 33% intend on doing another YMCA programme within the next 12 months (a further 33% are unsure).	Just over half of new YMCA participants and parents are more than satisfied with the overall process of joining the YMCA.

THREE-QUARTERS INTEND TO DO THEIR ACTIVITY AGAIN AT THEIR YMCA IN THE NEXT 12 MONTHS



Those **significantly more** likely to do again are:

- ▶ Aged **55 years +** (91% cf. 76%)
- ▶ Of **Asian or Indian ethnicity** (85%)
- ▶ From **YMCA Greater Wellington** (83%).

Those **significantly less** likely to do again are:

- ▶ Aged **11-18 years** (67% cf. 76%)
- ▶ From **YMCA Hawke's Bay** (56%).

Base: All respondents (Excluding Don't know/not applicable) (n=787)

Q9. How likely are/ is you/ your child to do <activity> at <insert location from Q2c> within the next 12 months?

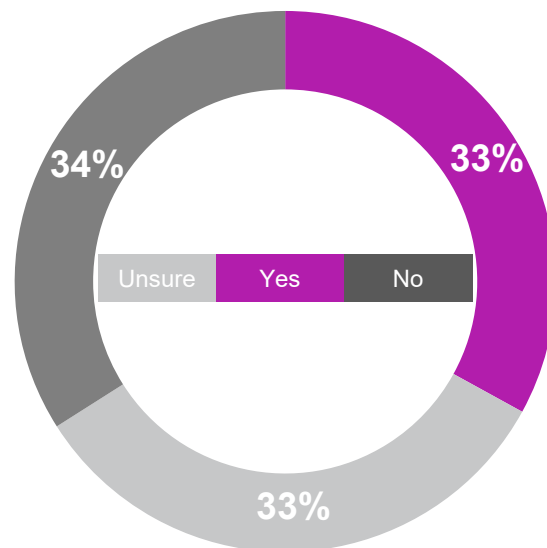
Q80. Do you intend to do any other YMCA programmes within the next 12 months? Base: All respondents (n=798)

A THIRD (33%) INTEND TO DO AN OTHER YMCA PROGRAMME WITHIN THE NEXT 12 MONTHS

INTENTION TO DO ANY OTHER YMCA PROGRAMMES IN THE NEXT 12 MONTHS

There is an even distribution between committing to an other YMCA activity in the next year, being unsure, and ruling it out.

Note: The different activity may be in addition to their current activity or as an alternative, to try out a new programme.



Those **significantly more** likely to do an other activity are:

- ▶ Teenage females, aged 13-18 (48% cf. 33%)
- ▶ Of Asian ethnicity (56%)
- ▶ Those currently participating in **Outdoor recreation** (56%)

Those **significantly less** likely are:

- ▶ Those currently participating in **Indoor recreation** (19% cf. 33%)
- ▶ Of European ethnicity (29%)
- ▶ Based in Christchurch (42% saying 'No' cf. 34%) or Hawkes bay (54% saying 'No')

REASONS RESPONDENTS ARE LIKELY OR UNLIKELY TO DO ACTIVITY AGAIN NEXT SEASON

"He enjoys the activities and the friends he makes and we need this convenient child care support whilst we work."

Parent, 8-10 years, Holiday Programmes

"Work commitments of both parents during the week with no family or support network to rely upon to manage early morning care for our child. The programme is convenient and we are happy with the service and like the team even if settling was a challenging experience for our then new entrant."

Parent, 5-7 years, Before School Care

"I have an exercise routine that I have been following for past 25 years and want to continue that."

Participant, 65-69 years, Indoor Recreation

"The swimming school and instructors are appalling and would often stare into the distance during lessons and yawn. They can't engage with the children and don't make an effort to make it fun so we have now changed to [...]. We tried gymnastics at [...] YMCA and found those instructors incompetent and disengaged and it was a waste of our time and money."

Parent, 8-10 years, Indoor Recreation

"The leaders are immature and unprofessional. We have had numerous examples of inappropriate comments made towards the children. Inconsistent application of punishments- making examples of children and playing favourites."

Parent, 8-10 years, Before School Care

LIKELY

"Amazing Pilates teacher, [...] is awesome. Fantastic value for money as if I have time I can do two Pilates classes for only \$16 a week."

Participant, 50-54 years, Indoor Recreation

"To get involved as a leader and help out on camp for the benefit of the kids attending as well as building relationships with other members of the YMCA community."

Participant, 17 years, Youth Leadership

"He loves to go after school care, all the time my son reminds me to book YMCA after school care. He will be very sad if he misses any of the after school care sessions."

Parent, 8-10 years, After School Care

"My child was very bored. Activities were too short. Leaders spent most of their time on their phones."

Parent, 11-12 years, Holiday Programme

"They were unable to handle her at all and instead of redirecting her or allowing her to calm down they just kept giving her warnings and sent her home. The staff had no special needs experience and were very young."

Parent, 8-10 years, Camps

"He was bullied there, and I talked to the workers about it and they basically said it didn't happen. He will never be going back."

Parent, 5-7 years, Before School Care

UNLIKELY

TWO-THIRDS ARE MORE THAN SATISFIED WITH THEIR YMCA EXPERIENCE

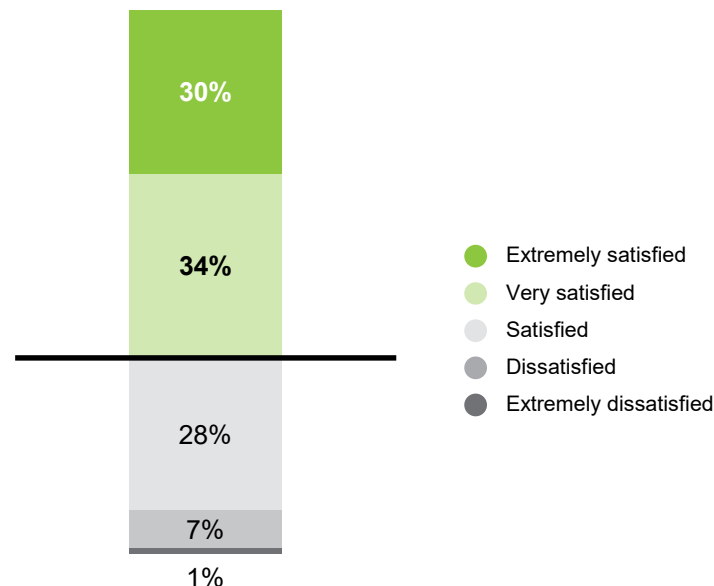
'Participants' are more likely than 'parents of participants' to be more than satisfied with their experience of participating in their activity at their YMCA (76% cf. 61% parents).

Those aged 8-10 years old are more likely to be *dissatisfied/ extremely dissatisfied* with their activity experience (11% cf. 8%).

SATISFACTION WITH OVERALL EXPERIENCE

% MORE THAN SATISFIED

64%



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

- ▶ Aged **13-18 years** (86% cf. 64%)
- ▶ '**Participants**' (76%)
- ▶ From **YMCA Christchurch** (74%).

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

- ▶ From **YMCA Hawke's Bay** (40% cf. 64%)
- ▶ Aged **8-10 years** (58%), **11-12 years** (46%)
- ▶ '**Parents**' (61%).

ABOUT HALF OF RESPONDENTS ARE 'PROMOTERS' OF THE ACTIVITY AT THEIR YMCA

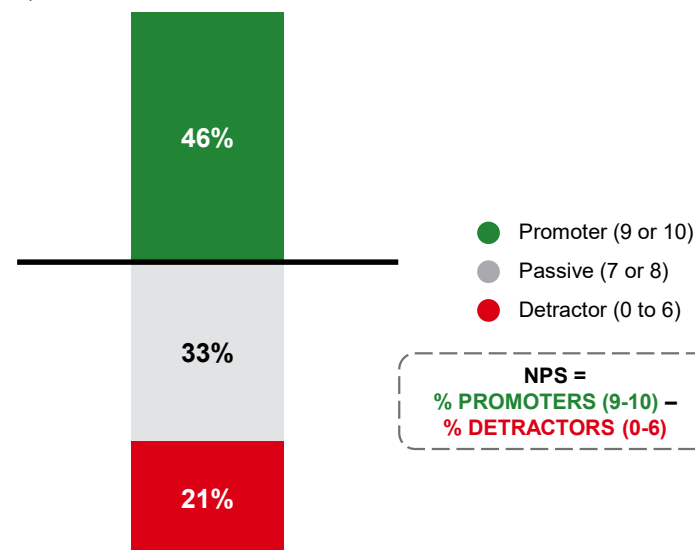
While nearly half (46%) are promoters of their YMCA activity, one in five (21%) are 'detractors' and are much less likely to recommend their YMCA activity to someone.

'Participants' are significantly more likely to be 'promoters' (55% cf. 44% 'parents') and 'parents' are more likely to be 'detractors' of their YMCA (23% cf. 11% 'participants').

LIKELIHOOD TO RECOMMEND ACTIVITY*

NET PROMOTER
SCORE (NPS)

+25



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

- ▶ Aged **13-18 years** (63% cf. 46%)
- ▶ Those from **YMCA Christchurch** (58%)
- ▶ **'Participants'** (55%).

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

- ▶ From **YMCA Hawke's Bay** (44% cf. 21%)
- ▶ Aged **11-12 years** (32%) or **8-10 years** (27%)
- ▶ Those of **Māori ethnicity** (29%).

*See page 4 for additional explanation regarding NPS (Net Promoter Score)

Base: All respondents (Excluding don't know) (n=791)

Q7. Imagine someone is interested in participating in <activity> at <insert location from Q2c>. If they asked you, how likely are you to recommend it to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

THREE-QUARTERS PERCEIVE VALUE FOR MONEY FROM THEIR YMCA

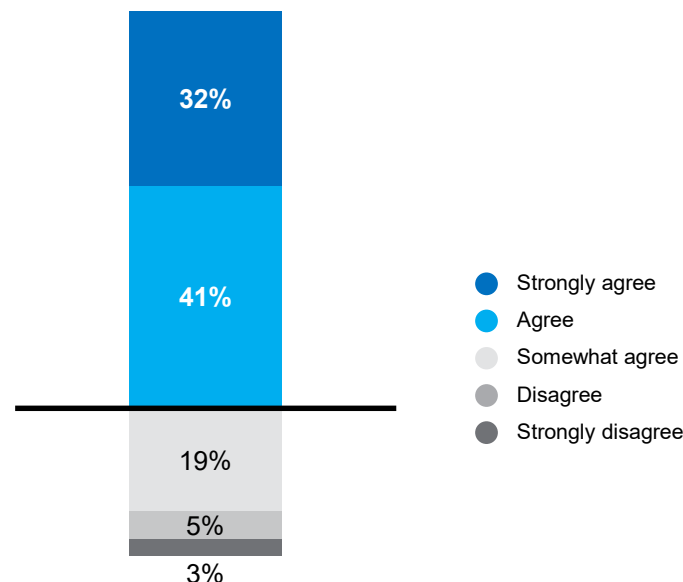
Only one in ten respondents (8%) *disagree* / *strongly disagree* that they are getting value for money from their YMCA.

'Parents' are significantly more likely to *disagree* / *strongly disagree* they are getting value for money, when compared with 'participants' (9% cf. 4%).

PERCEPTIONS OF VALUE FOR MONEY

% AGREE OR
STRONGLY AGREE

73%



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

- ▶ 'Participants' (81% cf. 73%)
- ▶ Aged **13-18 years** (89%) or **35 years +** (83%)
- ▶ From **YMCA Greater Wellington** (79%)

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

- ▶ Aged **5-12 years** (69% cf. 73%)
- ▶ From **YMCA Hawke's Bay** (44%)

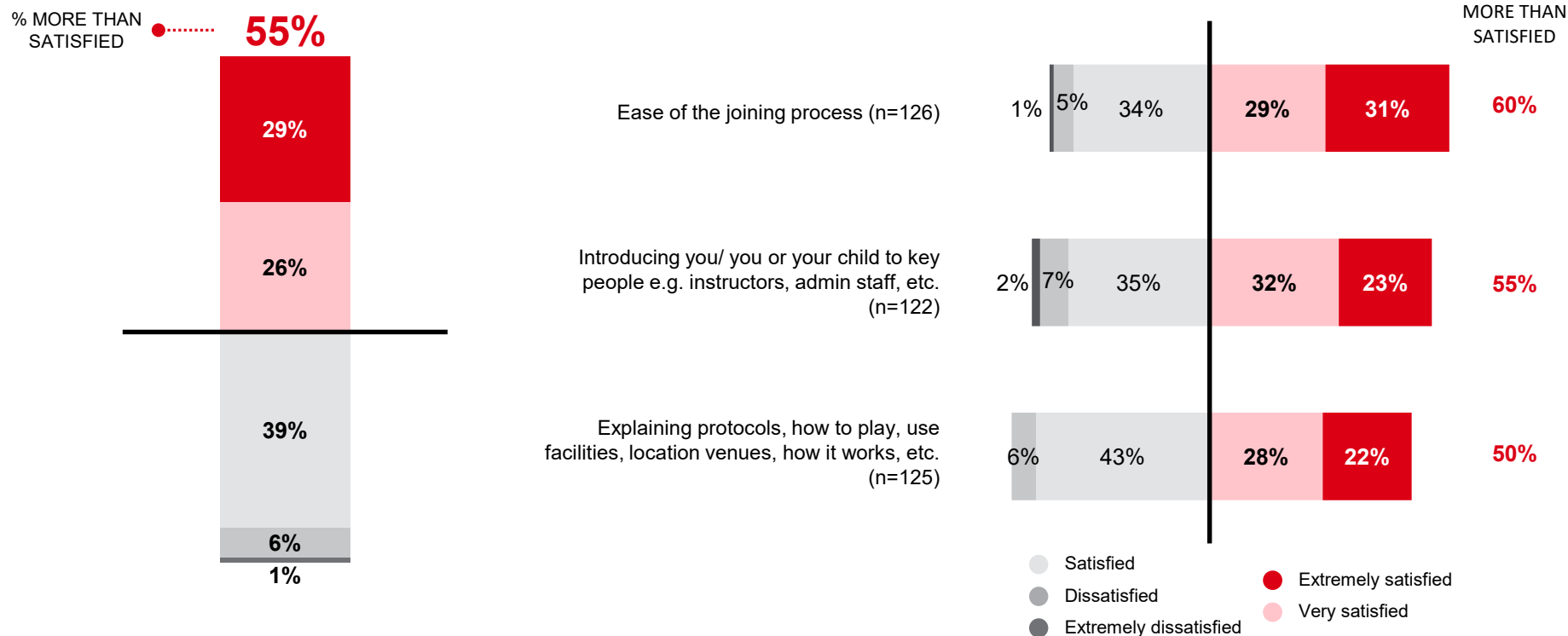
Base: All respondents (Excluding Not applicable, Don't know/Can't say) (n=764)

Q11. If you paid for the programme you/your child attended, 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 YMCA make it well worth the money I pay/ they pay. Please select 'not applicable' if there wasn't a fee.

HALF OF 'NEW' YMCA USERS ARE MORE THAN SATISFIED WITH THE OVERALL JOINING PROCESS

10% of new YMCA users are dissatisfied/ very dissatisfied with 'Introducing you to key people e.g. instructors, admin staff, etc.', while only 50% are more than satisfied with 'Explaining protocols, how to play, use facilities, location venues, how it works, etc.'

SATISFACTION WITH OVERALL JOINING PROCESS



Base: All respondents who have been YMCA users for less than one year (Excluding Don't know/not applicable) (n=122-126)

Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their YMCA. How satisfied are you with your/ their YMCA on the following...

KEY METRICS BY METRO ASSOCIATIONS

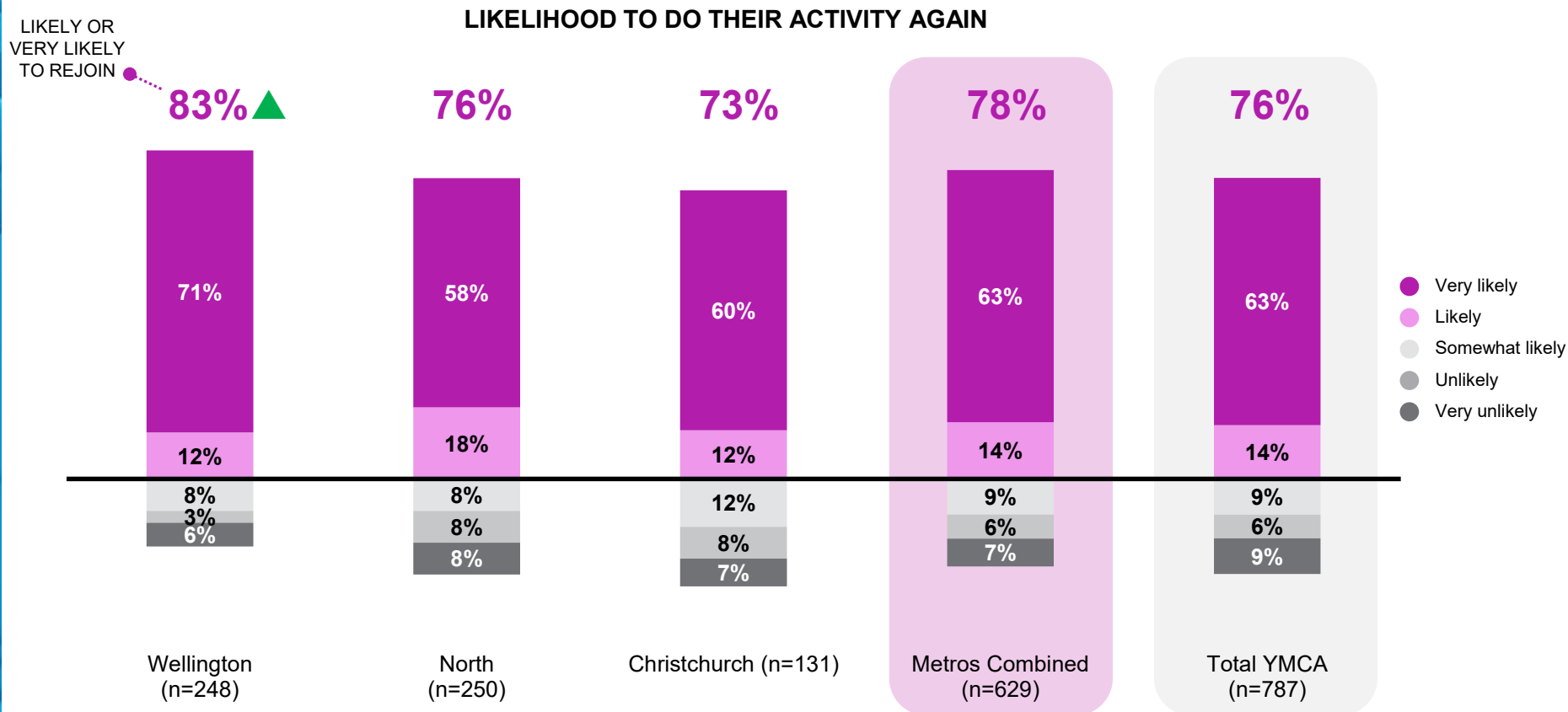
KEY METRIC RESULTS – METRO AREAS

OVERALL, HOW IS THE YMCA PERFORMING IN METRO AREAS?

SATISFACTION	NPS	VALUE FOR MONEY	LIKELIHOOD TO DO AGAIN NEXT 12 MONTHS	JOINING PROCESS
67%	+29	74%	78%	55%
National average: 64%	National average: +25	National average: 73%	National average: 76%	National average:
Two-thirds of respondents in metro associations are more than satisfied (very or extremely satisfied) with the overall experience at their YMCA.	With an NPS of +29, around half of YMCA participants and parents in metro areas are likely to recommend their activity (48% are 'promoters' and 18% are 'detractors').	Three-quarters in metro areas feel they get good value for money from their YMCA i.e. opportunities, services and benefits that they receive from their YMCA make it well worth the money they pay.	78% in metro areas are likely to do the activity again in the next 12 months, while 33% intend on doing another YMCA programme within the next 12 months (a further 33% are unsure).	Just over half of new YMCA participants and parents are more than satisfied with the overall process of joining the YMCA.

OVER THREE-QUARTERS IN METRO ASSOCIATIONS INTEND TO DO THEIR ACTIVITY AGAIN AT THEIR YMCA IN THE NEXT 12 MONTHS

Those participating in Wellington are most likely to return to their current programme, with 71% 'very likely' to do their activity again.



Base: All respondents (Excluding Don't know/not applicable) (n=787)

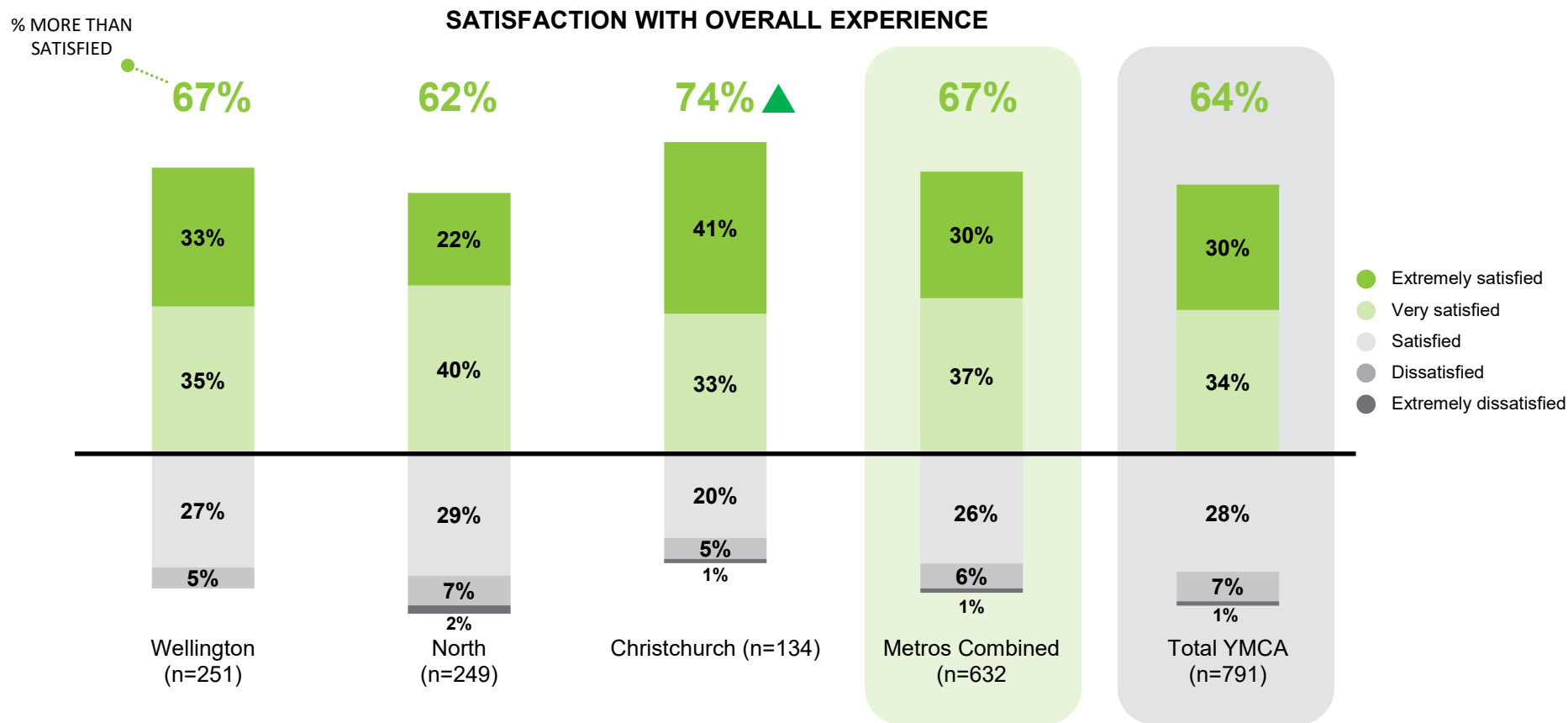
Q9. How likely are/ is you/ your child to do <activity> at <insert location from Q2c> within the next 12 months?

Q80. Do you intend to do any other YMCA programmes within the next 12 months? Base: All respondents (n=798)

▲ ▼ Significantly higher/lower than Total YMCA

RESPONDENTS FROM CHRISTCHURCH ARE MOST SATISFIED WITH THEIR YMCA ACTIVITY

Those from North are the least satisfied within the metros, with satisfaction sitting below the national average.



Base: All respondents (Excluding Don't know/not applicable) (n= 791)

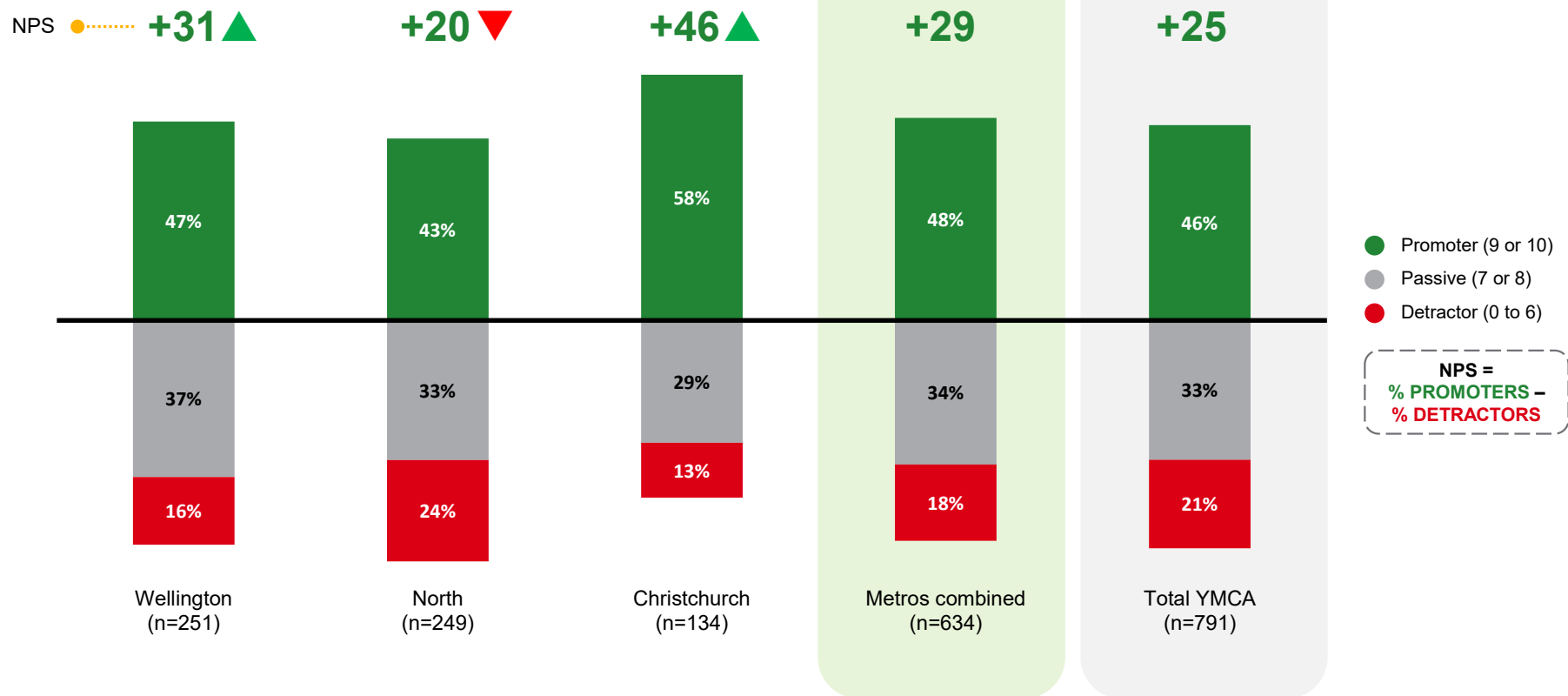
Q6. To what extent are you satisfied or dissatisfied with the/ their overall experience of participating in <activity> at your/ their YMCA?

▲ ▼ Significantly higher/lower than Total YMCA

ABOUT HALF OF RESPONDENTS IN THE MAJOR METROS ARE 'PROMOTERS' OF THE ACTIVITY AT THEIR YMCA.

Those participating in Christchurch are significantly more likely to recommend their activity to others. Those in the North are less likely to recommend, with almost a quarter being 'detractors'.

LIKELIHOOD TO RECOMMEND ACTIVITY



Base: All respondents (Excluding don't know) (n=791)

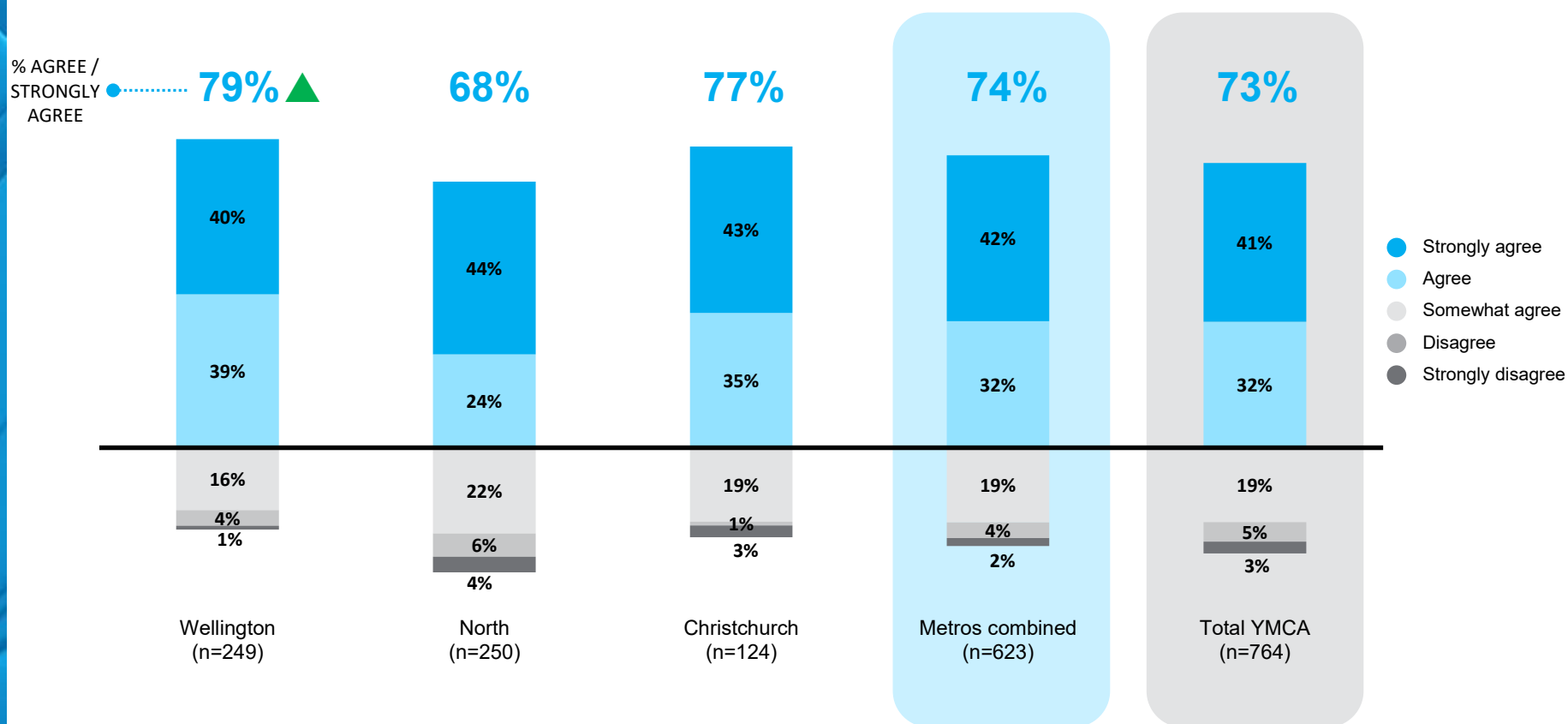
Q7. Imagine someone is interested in participating in <activity> at <insert location from Q2c>. If they asked you, how likely are you to recommend it to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

▲ ▼ Significantly higher/lower than Total YMCA

THREE-QUARTERS IN METRO AREAS PERCEIVE VALUE FOR MONEY FROM THEIR YMCA

Perception of good value is highest in Wellington and Christchurch, whereas North is below the national and metro average.

PERCEPTIONS OF VALUE FOR MONEY



▲ ▼ Significantly higher/lower than Total YMCA

Base: All respondents (Excluding Not applicable, Don't know/Can't say) (n=764)

Q11. If you paid for the programme you/your child attended, 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 YMCA make it well worth the money I pay/ they pay. Please select 'not applicable' if there wasn't a fee.

WHAT IS CAUSING THESE RATINGS?

SECTION SUMMARY

This section explores the YMCA experience in more detail; including satisfaction levels for a range of attributes of the experience (i.e. 'drivers'), and the level of 'importance' of each driver in terms of encouraging users to recommend their YMCA activity to others.

- 1 The most 'important' drivers of recommendation are:
 - 1) *The quality of leaders, tutors or instructors* (71% are 'more than satisfied')
 - 2) *Value for money* (73%)
 - 3) *Being professional and well managed* (66%)
- 2 All three of the above drivers are 'strengths' as they are above-average for satisfaction. In addition, '*Being professional and well managed*' is also important to monitor due to its relative importance and only marginally above average score.
- 3 '*Being friendly and welcoming*' is the driver with the highest level of satisfaction (77% are 'more than satisfied').
- 4 The following drivers are YMCA's 'priorities for improvement' as they are above-average in terms of 'importance' but below-average for satisfaction level:
 - 1) *Allowing me to fulfil my potential* (62% are 'more than satisfied')
 - 2) *Being responsive to my needs and requirements* (62%)
 - 3) *Fostering a sense of pride and belonging to my YMCA* (60%)
 - 4) *Providing me the information when I need it* (62%)
- 5 Although relatively low in terms of 'importance' for driving recommendation, '*Engaging with the local community*' represents the most notable secondary priority for improvement, as it is the lowest scoring driver (52% being 'more than satisfied').
- 6 Across all drivers, those who are 'more than satisfied' varies from 52% to 87%. Encouragingly, levels of dissatisfaction are relatively low, with those who are dissatisfied/ very dissatisfied ranging between 0% and 7%.

WHAT DRIVES A RESPONDENT'S RECOMMENDATION?

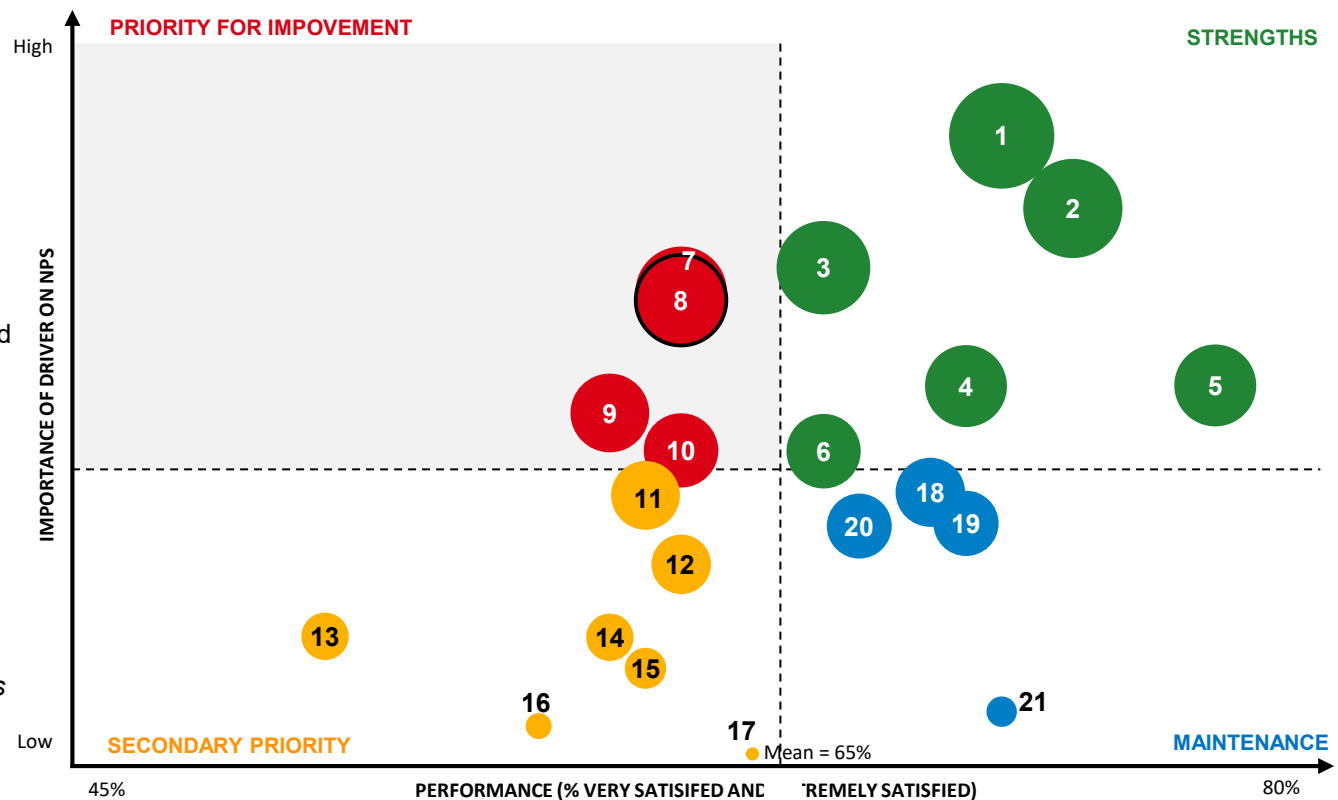
The most 'important' drivers of recommendation for YMCA are:

1. *The quality of leaders, tutors or instructors*
2. *Value for money*
3. *Being professional and well managed*

All three of these drivers are considered to be 'strengths' (i.e. above-average 'importance' and above-average for satisfaction)

The following four drivers are 'priorities for improvement' (i.e. above-average 'importance' but below-average for satisfaction):

- *Allowing me/them to fulfil my/their potential*
- *Being responsive to my/their needs and requirements*
- *Fostering a sense of pride and belonging to my/their YMCA*
- *Providing me/them the information when I/they need it*



STRENGTHS

1. Quality of leaders, tutors or instructors
2. Value for money
3. Being professional and well managed
4. The tutor/leader/instructor encourages a safe environment and has expertise in the activity
5. Being friendly and welcoming
6. Encouraging me/them to participate in activities

PRIORITY

7. Encouraging me/them to fulfil my/their potential
8. Being responsive to my/their needs and requirements
9. Fostering a sense of pride and belonging to my/their YMCA
10. Providing me/them the information when I/they need it

SECONDARY PRIORITY

11. Encouraging me/them to connect with others
12. The availability of programmes/activities
13. Engaging with the local community
14. Having well maintained venues
15. The equipment is well maintained and safe
16. Having clean and well maintained facilities e.g. changing rooms, toilets
17. The ease of accessing the venues e.g. location, parking, opening times

MAINTENANCE

18. Is fair and provides equal opportunities
19. Providing a safe environment for adults and children
20. Encouraging respect of others
21. The activity is safe

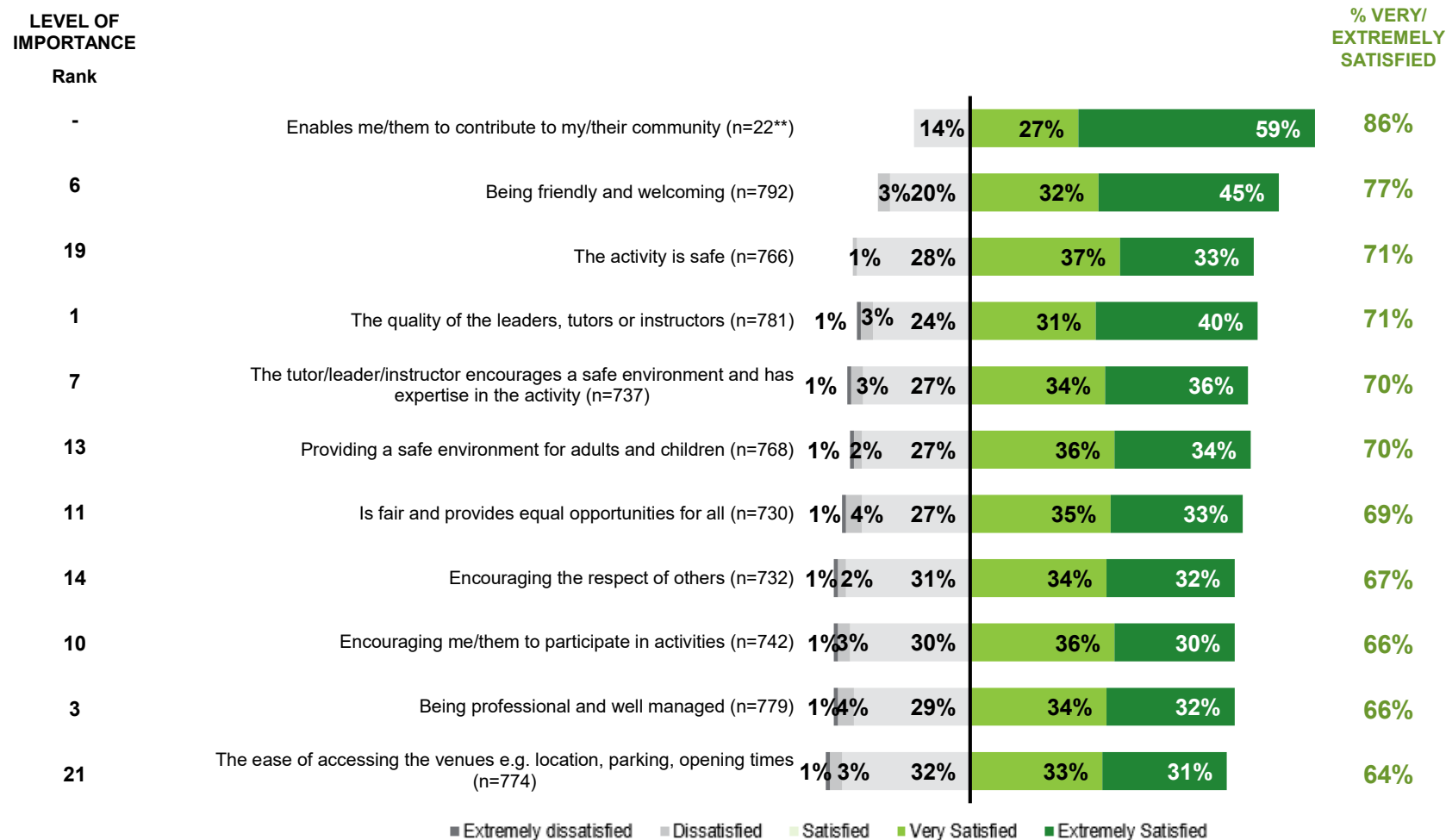
Base: All respondents (Excluding Don't know/not applicable)

Q7. Imagine someone is interested in participating in <activity> at <insert location from Q2c>. If they asked you, how likely are you to recommend it 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. Only variables asked of all respondents are included. See page 83 for guidance on reading this graph.

PERFORMANCE IN DRIVERS OF PARTICIPANT EXPERIENCE

'Participants' are more satisfied than 'parents' for the majority of drivers. Those with the biggest differences are: *is fair and provides equal opportunities* (84% cf. 65%), *the quality of the leaders, tutors or instructors* (86% cf. 68%) and *being professional and well managed* (79% cf. 63%).



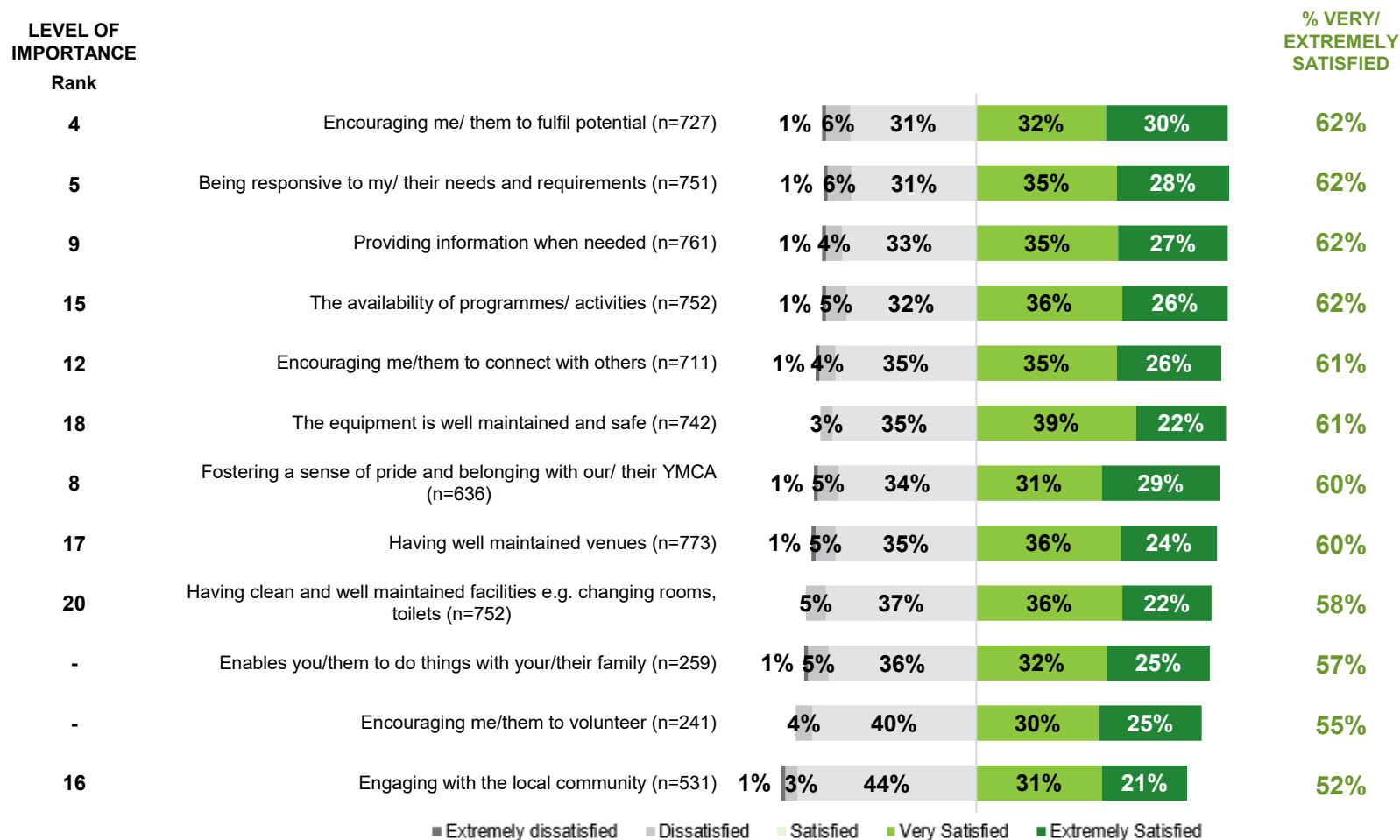
Base: All respondents (Excluding Don't know/not applicable)

*Small sample size; ** Very small sample size – only asked for 'Youth Leadership'

Q10a/Q10b.. How would you/ your child rate your/ their overall satisfaction with your/ their YMCA on each of the following...

PERFORMANCE IN DRIVERS OF PARTICIPANT EXPERIENCE

'Participants' are significantly more satisfied than 'parents' in eight of the below 12 drivers. Those with the biggest differences are: *enables you to do things with your family* (71% cf. 50%) and *engaging with the local community* (74% cf. 45%).



IF FEES INCREASED, 16% WOULD WANT TO SEE INVESTMENT REFLECTED IN 'HELPING TO DEVELOP SKILLS'

'Participants' are more likely than 'parents' to want investment in *facilities* (23% cf. 5%) and *the number of programmes offered* (17% cf. 10%).

'Parents' are more likely to want investment in *the quality of programmes offered* (15% cf. 4% 'participants') and *helping them to develop skills* (19% cf. 2%).

Respondents from YMCA Greater Wellington are less likely than the YMCA average to want to see investment in *the quality of programmes offered* (7% cf. 13%).

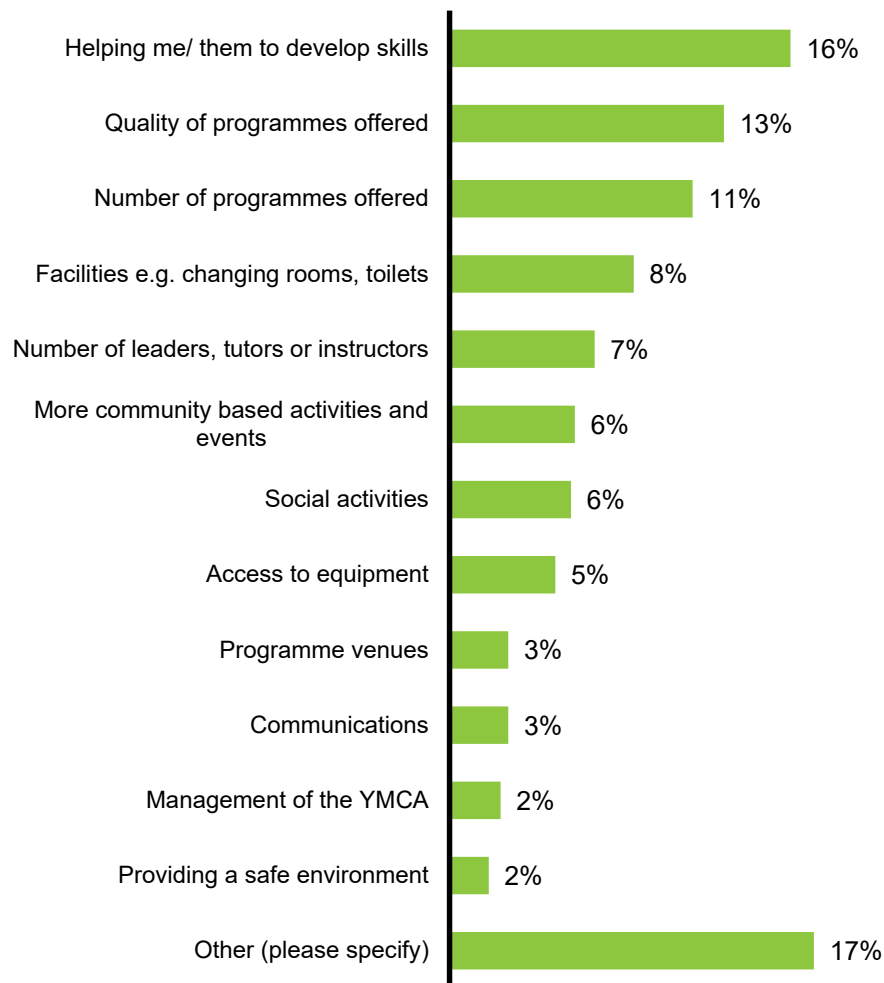
Those from YMCA North are more likely to want investment to be reflected in *the management of the YMCA* (4% cf. 2%) or *the quality of programmes offered* (18% cf. 13%).



19%

Would not want anything improved if it meant their fees increased

FOCUS FOR IMPROVEMENT



Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=553)

Q14. If your/ your child's YMCA was going to focus on improving one of the following aspects, and the fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?

Note: Only aspects with 2% of responses or greater are shown

WHAT SHOULD BE INVESTED IN OR IMPROVED?

"Instead of games and crafts all the time assign some time for life skills and science and literature. Games that encourage public speaking or performing skills. Quizzes and puzzles. In house movie to make it cheaper.

Cleaner toilets and some comfy lounge environment for kids to have a quite resting times like floor cushions and bean bags. In house karaoke, friendly matches and in house Olympics. Doesn't have to be very professional."

Parent, 8-10 years, Holiday Programme

"The kids tell me they always do the same stuff at after school, so bringing in a larger range of activities available would be good."

Parent, 8-10 years, After School Care

"Different outings for the holiday programmes instead of them being the same for each school holiday so kids are able to experience something different."

Parent, 5-7 years, Before School Care

"More classes at times I can attend would be neat."

Participant, 20-24 years, Indoor Recreation

"More class times in Gymnastics to reflect that if working parents and to create smaller class sizes."

Parent, 8-10 years, Indoor Recreation

++ +

HELPING ME TO DEVELOP SKILLS



QUALITY OF PROGRAMMES OFFERED



NUMBER OF PROGRAMMES OFFERED

"How to turn ideas into action/projects. Try to learn a new skill that you haven't tried before and learn to back yourself. Try something that you can continue on with after holiday programme. Think about how they can help others in community and what things they can do with family after holiday programme."

Parent, 11-12 years, Holiday Programme

"Social skill development would be good. Sessions on how to be a good friend."

Parent, 8-10 years, Holiday Programme

"Currently there seems to be minimal planned activities for the children to participate in. Often told they can't do things as the little kids can't do it. Appears to be minimal effort made by the majority of the staff to keep the children engaged and active. I wonder if the age of the staff affects what activities are done each day as in the main they are now all older ladies whereas previously when some younger staff they appeared to get outside and do more stuff."

Parent, 8-10 years, After School Care

"My daughter finds the after school care very boring and dislikes being there. She has the same opinion when she does in-centre holiday programmes, she complains the advertised activity only goes on for about an hour and the rest of the day (8 hrs or so) is the same old stuff."

Parent, 5-7 years, After School Care

YMCA ENVIRONMENT

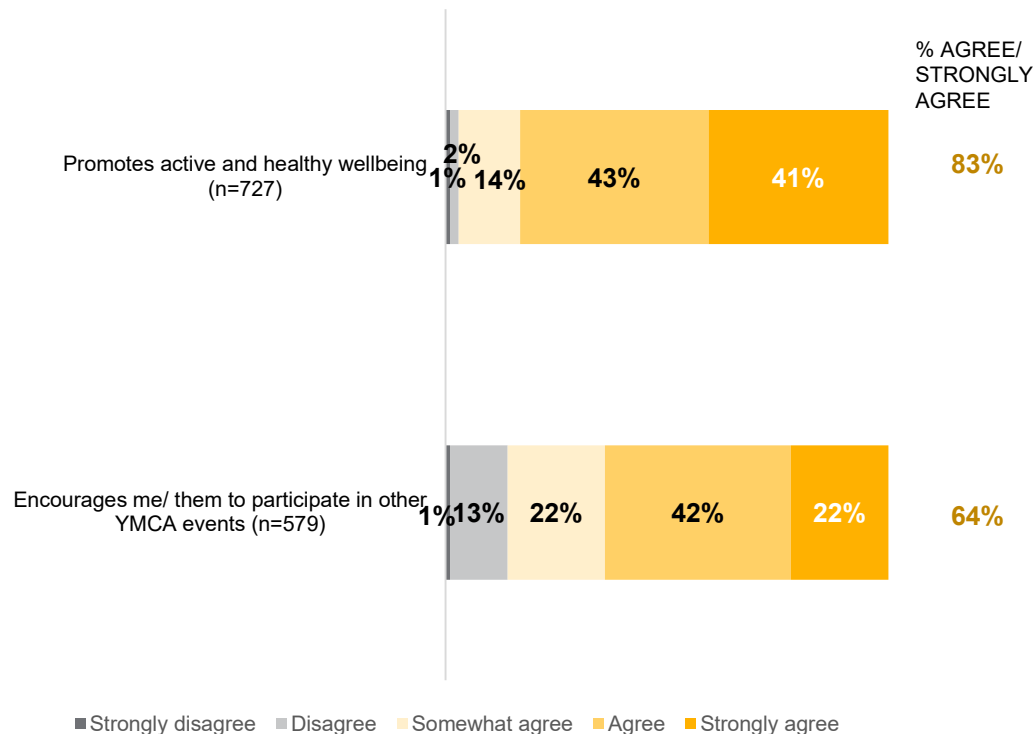
FOUR IN FIVE AGREE THEIR YMCA PROMOTES ACTIVE AND HEALTHY WELLBEING

'Participants' are more likely than 'parents' to agree that their YMCA *promotes active and healthy wellbeing* (90% cf. 82%).

Those aged 13-18 years and 35 or older are more likely to agree their YMCA *promotes active and healthy wellbeing* (93% and 91% respectively). Respondents from YMCA Christchurch are also more likely to agree with this statement (90%).

Two-thirds (64%) agree that their YMCA *encourages them to participate in other YMCA events*.

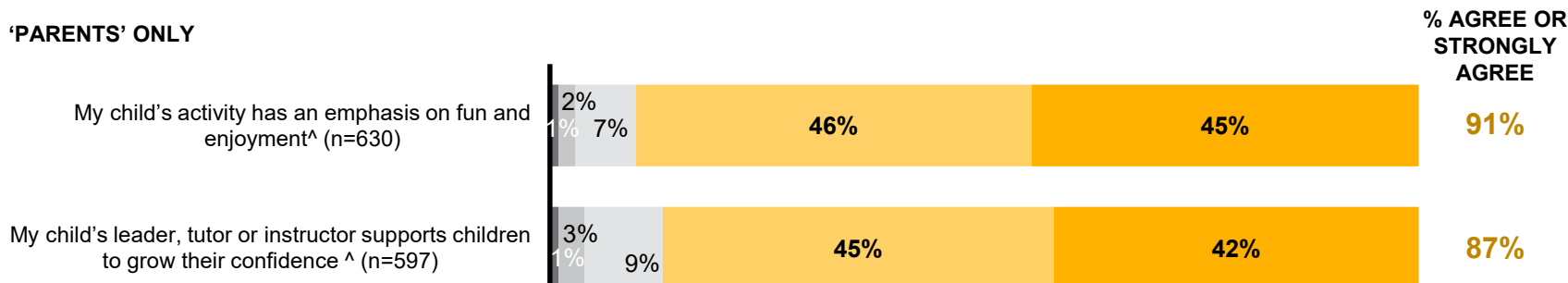
Those of Asian or Indian ethnicities are significantly more likely to agree that their YMCA *encourages them to participate in other YMCA events* (81% cf. 64%).



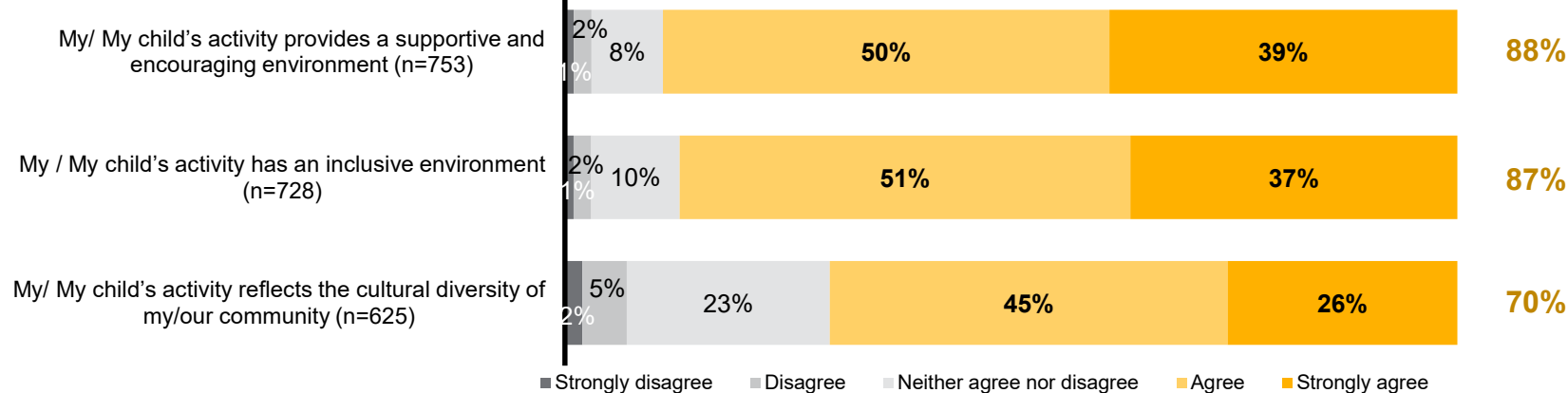
YMCA ACTIVITY ENVIRONMENT

'Participants' are more likely than 'parents' to agree that their *activity provides a supportive and encouraging environment* (96% cf. 87% 'parents'), *activity reflects the cultural diversity of my community* (82% cf. 67%) and that the *activity has an inclusive environment* (93% cf. 86%).

'PARENTS' ONLY



'PARTICIPANTS' & 'PARENTS'



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

[^] Only asked of parents of children participating

ACTIVITIES

HOW DOES EXPERIENCE DIFFER BETWEEN ACTIVITIES?

Results for the YMCA cover the following activities:



After School-care



Before School-care



Outdoor Recreation

Activities that take place outdoors e.g. nature walks, high ropes, sailing, kayaking, team building, etc.



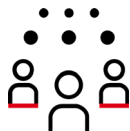
Holiday Programmes

Outdoor activities held during the school holidays e.g. arts, crafts, games, sports, swimming, mountain biking, etc.



Camps

Camping trips for schools, families, community or church groups as well as leadership and business retreats.



Youth Leadership

Programmes that develop leadership skills and sense of community.



Indoor Recreation

A class or activity that is held at the YMCA and instructed by YMCA staff e.g. kindy gym, climbing, dance, gymnastics, basketball, squash, badminton, etc.

KEY METRIC RESULTS ACROSS ACTIVITIES

ACTIVITY	TOTAL (n=126-791)	After School- care (n=23*-197)	Before School- care (n=11*-91)	Outdoor Recreation (n=6**-34)	Holiday Programmes (n=46-198)	Camps (n=7**-48)	Youth Leadership (n=2**-25*)	Indoor Recreation (n=31-203)
SATISFACTION	64%	53%	56%	70%	65%	81%	88%	69%
NPS	+25	+5	+20	+35	+18	+60	+64	+40
VALUE FOR MONEY	73%	67%	53%	77%	76%	85%	95%	79%
LIKELIHOOD TO DO ACTIVITY AGAIN NEXT 12 MONTHS	76%	78%	72%	76%	71%	77%	75%	81%
JOINING PROCESS^	55%	52%	18%	100%	59%	57%	100%	52%

Base: Q6/Q7 All Respondents (Excluding Don't know/ Can't say), Q11 All Respondents (Excluding Not Applicable, Don't know/ Can't say), Q9 All respondents (Excluding Don't know/Can't say), Q20 New YMCA users (Excluding Don't know/ Can't say)

*Small sample size; ** Very small sample size

■/■ Significantly higher/lower than Total YMCA 2019

MAIN REASONS FOR ATTENDING A YMCA

MAIN REASON	TOTAL (n=798)	After School- care (n=198)	Before School- care (n=91)	Outdoor Recreation (n=34)	Holiday Programmes (n=199)	Camps (n=48)	Youth Leadership (n=25*)	Indoor Recreation (n=203)
For out of school care	50%	87%	96%	24%	57%	40%	8%	<1%
To get fit and healthy	12%	1%	2%	3%	4%	6%	4%	39%
To learn/ improve skills	11%	2%	-	18%	2%	4%	16%	32%
To have fun / To play socially	10%	1%	-	9%	15%	17%	8%	16%
To gain confidence	3%	1%	-	9%	4%	4%	12%	2%
To socialise	2%	3%	-	-	3%	4%	8%	-
To have access to facilities and venues	2%	1%	-	9%	2%	2%	-	3%
To get outdoors	2%	-	-	12%	1%	6%	8%	<1%
Other	6%	4%	2%	6%	10%	8%	8%	5%

Base: All respondents

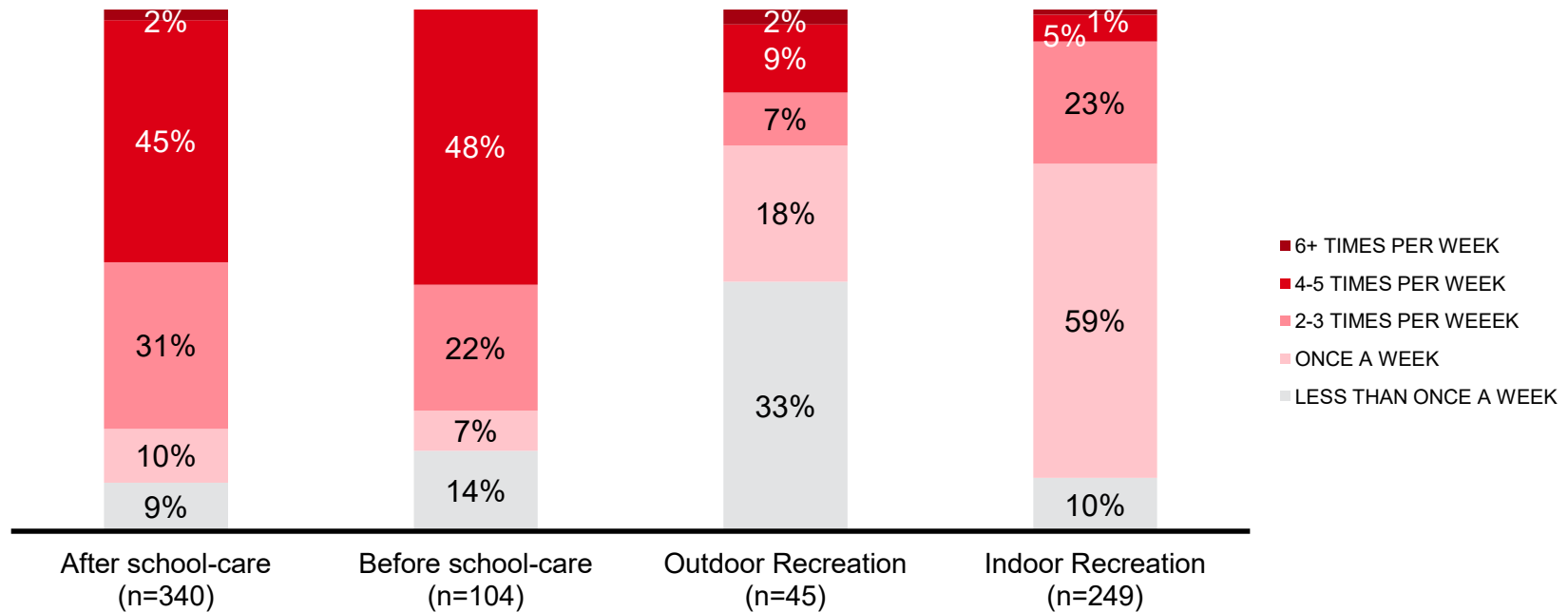
Q4. What is the main reason you/ your child attend/attends your/their YMCA?

*Small sample size

Note: Only reasons with 2% or greater are shown

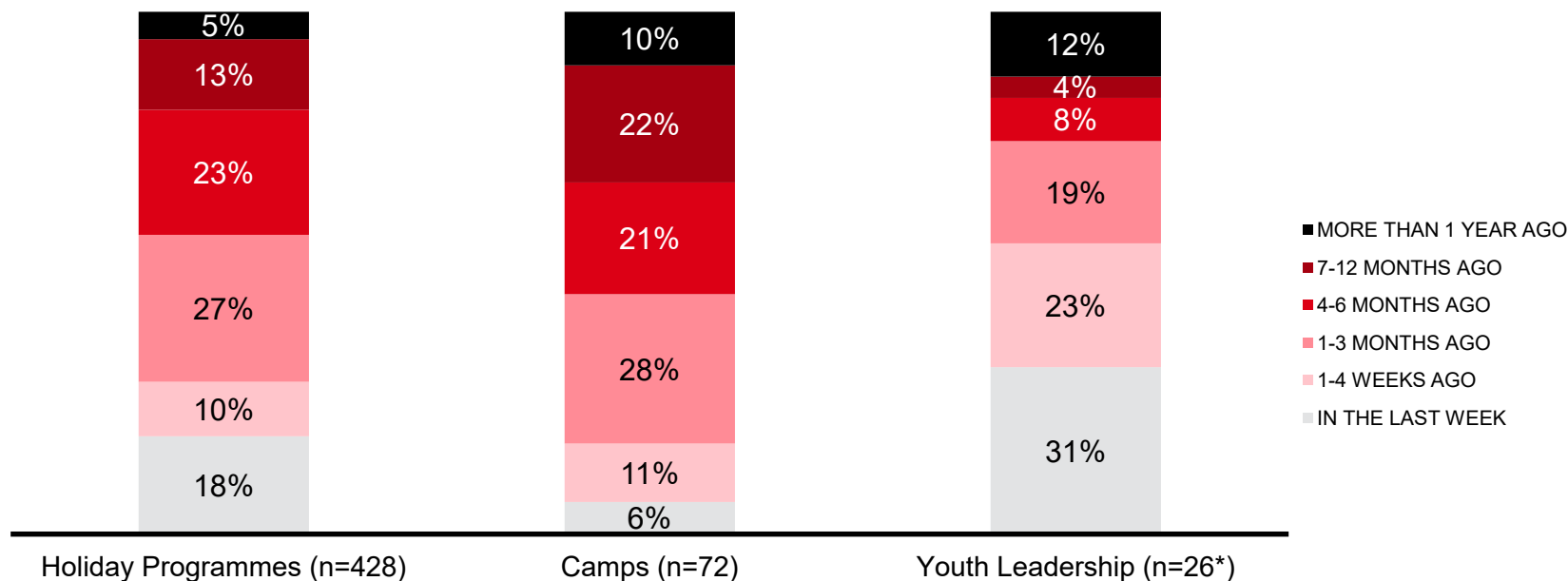
FREQUENCY OF ENGAGEMENT IN AFTER / BEFORE SCHOOL CARE, OUTDOOR AND INDOOR RECREATION

FREQUENCY OF ATTENDING EACH ACTIVITY



MOST RECENT ENGAGEMENT IN HOLIDAY PROGRAMMES, CAMPS, YOUTH LEADERSHIP

MOST RECENT PARTICIPATION IN EACH ACTIVITY



Base: All respondents who participated in Holiday programmes, Camps and Youth Leadership
Q79. When was the last time you completed the following?

*Small sample size

DRIVERS OF EXPERIENCE BY ACTIVITY (1 OF 2)

DRIVERS OF PARTICIPANT EXPERIENCE	TOTAL	After School-care (n=129-198)	Before School-care (n=57*-91*)	Outdoor Recreation (n=13**-34*)	Holiday Programme (n=96*-198)	Camps (n=20**-47*)	Youth Leadership (n=17**-25**)	Indoor Recreation (n=75*-202)
Promotes active and healthy wellbeing (n=727)	83%	76%	81%	79%	85%	89%	100%	86%
Being friendly and welcoming (n=792)	77%	73%	65%	82%	76%	81%	91%	82%
The quality of the leaders, tutors or instructors (n=781)	71%	65%	63%	73%	70%	85%	88%	76%
The activity is safe (n=766)	71%	63%	65%	65%	73%	81%	88%	75%
Providing a safe environment for adults and children (n=768)	70%	64%	63%	74%	67%	85%	92%	76%
The tutor/leader/instructor encourages a safe environment and has expertise in the activity (n=737)	70%	63%	59%	76%	69%	87%	92%	73%
Is fair and provides equal opportunities for all (n=730)	69%	58%	60%	82%	71%	65%	91%	76%
Encouraging the respect of others (n=732)	67%	64%	62%	71%	69%	74%	96%	61%
Being professional and well managed (n=779)	66%	57%	61%	75%	65%	74%	84%	73%
Encouraging me/them to participate in activities (n=742)	66%	60%	55%	79%	69%	77%	92%	66%
The ease of accessing the venues e.g. location, parking, opening times (n=774)	64%	65%	58%	63%	64%	78%	75%	61%
Encourages me/them to participate in other YMCA events (n=579)	64%	61%	61%	71%	63%	77%	88%	60%
Providing me/ them the information I/ they need when I/ they need it (n=761)	62%	55%	57%	73%	62%	74%	72%	66%

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

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

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

Q10c. How much do you agree or disagree that your/ their YMCA...

*Small sample size; ** Very small sample size

DRIVERS OF EXPERIENCE BY ACTIVITY (2 OF 2)

DRIVERS OF PARTICIPANT EXPERIENCE	TOTAL	After School-care (n=129-198)	Before School-care (n=57*-91*)	Outdoor Recreation (n=13**-34*)	Holiday Programme (n=96*-198)	Camps (n=20**-47*)	Youth Leadership (n=17**-25**)	Indoor Recreation (n=75*-202)
Encouraging me/ them to fulfil my/ their potential (n=727)	62%	52%	52%	81%	61%	78%	96%	66%
Being responsive to my/ their needs and requirements (n=751)	62%	56%	58%	65%	65%	74%	80%	61%
The availability of programmes/ activities (n=752)	62%	58%	56%	76%	64%	72%	84%	60%
Encouraging me/them to connect with others (n=711)	61%	56%	52%	76%	63%	78%	88%	55%
The equipment is well maintained and safe (n=742)	61%	54%	61%	73%	61%	72%	88%	59%
Having well maintained venues (n=773)	60%	51%	61%	73%	63%	65%	84%	60%
Fostering a sense of pride in our/ their YMCA (n=636)	60%	52%	61%	61%	62%	70%	91%	58%
Having clean and well maintained facilities e.g. changing rooms, toilets (n=752)	58%	50%	54%	64%	62%	66%	83%	56%
Enables you/them to do things with your/their family (n=259)	57%	-	-	23%	57%	70%	71%	57%
Encouraging me/them to volunteer (n=241)	55%	-	-	67%	56%	58%	86%	41%
Engaging with the local community (n=531)	52%	44%	44%	50%	50%	53%	88%	58%
Youth Leadership only statement:								
Enables me/them to contribute to my/their community (n=22*)	86%	-	-	-	-	-	86%	-

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

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

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

Q10c. How much do you agree or disagree that your/ their YMCA...

■/■ Significantly higher/lower than Total YMCA 2019

FOCUS FOR IMPROVEMENT (IF FEES INCREASED) TOP 5 AREAS, BY ACTIVITY:

Ranking	After School Care (n=138)	Before School Care (n=48)	Outdoor Recreation (n=27*)	Holiday Programmes (n=136)	Camps (n=33)	Youth Leadership (n=22*)	Indoor Recreation (n=149)
1	Helping me/ them to develop skills (19%)	Helping me/ them to develop skills (15%)	Number of leaders, tutors or instructors (11%)	Helping me/ them to develop skills (18%)	Facilities (18%)	Number of programmes offered (27%)	Number of programmes offered (17%)
2	Quality of programmes offered (16%)	Quality of programmes offered (13%)	More community based activities and events (11%)	Quality of programmes offered (14%)	Helping me/them to develop skills (15%)	Helping me/them to develop skills (18%)	Facilities (13%)
3	Number of programmes offered (9%)	Facilities (8%)	Programme venues (11%)	Number of programmes offered (12%)	Number of programmes offered (6%)	Facilities (14%)	Quality of programmes offered (13%)
4	Social activities (7%)	Social activities (8%)	Providing a safe environment (11%)	More community based activities and events (9%)	Social activities (6%)	More community based activities and events (14%)	Helping me/them to develop skills (12%)
5	Facilities (6%)	Number of leaders, tutors or instructors (6%)	Helping me/them to develop skills (7%)	Social activities (8%)	Quality of programmes offered (6%)	Social activities (9%)	Number of leaders, tutors or instructors (10%)

Base: All respondents (Excluding Don't know/I don't want to improve anything if it means my fees need to increase) (n=553)

Q14. If your/ your child's YMCA was going to focus on improving one of the following aspects, and the fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?

* Small sample size

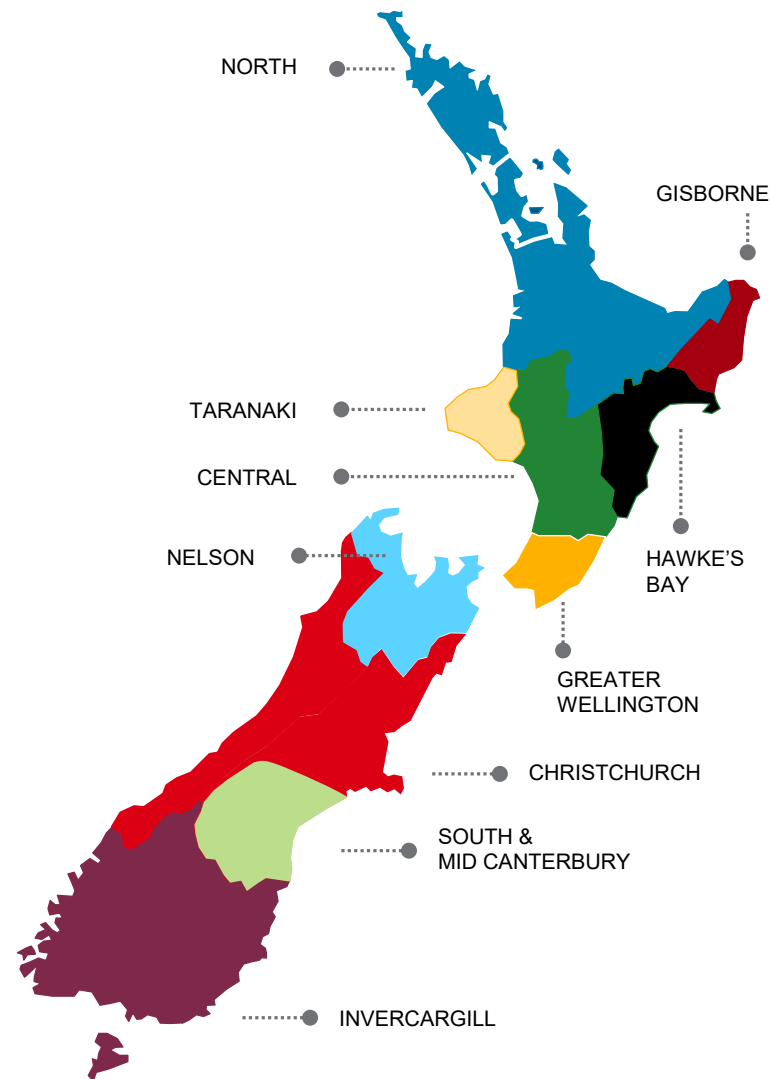
Note: Only aspects with 2% of responses or greater are shown

REGIONAL DIFFERENCES

HOW DOES EXPERIENCE DIFFER BETWEEN REGIONS?

Results for regions cover the following areas.

YMCA North	<ul style="list-style-type: none"> ▶ Auckland ▶ Hamilton ▶ Tauranga
YMCA Gisborne	<ul style="list-style-type: none"> ▶ Gisborne
YMCA Hawkes Bay	<ul style="list-style-type: none"> ▶ Hawke's Bay
YMCA Taranaki	<ul style="list-style-type: none"> ▶ Taranaki
YMCA Central	<ul style="list-style-type: none"> ▶ Palmerston North ▶ Whanganui
YMCA Greater Wellington	<ul style="list-style-type: none"> ▶ Masterton ▶ Upper Hutt ▶ Lower Hutt ▶ Porirua ▶ Wellington
YMCA Nelson	<ul style="list-style-type: none"> ▶ Nelson ▶ Marlborough
YMCA Christchurch	<ul style="list-style-type: none"> ▶ Christchurch
YMCA South & Mid Canterbury	<ul style="list-style-type: none"> ▶ Ashburton ▶ Timaru
YMCA Invercargill	<ul style="list-style-type: none"> ▶ Invercargill



THOSE FROM YMCA GREATER WELLINGTON AND YMCA CHRISTCHURCH ARE HAVING A MORE POSITIVE EXPERIENCE.

Respondents from YMCA Greater Wellington also have a higher perceived value for money and likelihood to do the activity again. However, those from YMCA Hawke's Bay are significantly below the total YMCA result in most key metrics.

Key Metrics	TOTAL (n=126-791)	NTH (n=33-251)	GIS (n=1**-14*)	HB (n=6**-35)	TAR (n=4**-27*)	CEN (n=15*-41)	WLG (n=32-249)	NSN (n=1**)	CHC (n=22*-134)	STH & MID CAN (n=12*-29*)	INV (n=1**-12*)
SATISFACTION	64%	62%	14%	40%	41%	66%	67%	100%	74%	66%	75%
NPS	+25	+20	-43	-12	-4	+23	+31	0	+46	+31	+50
VALUE FOR MONEY	73%	68%	54%	44%	67%	71%	79%	-	77%	93%	83%
LIKELIHOOD TO DO ACTIVITY AGAIN NEXT 12 MONTHS	76%	76%	50%	56%	81%	76%	83%	100%	73%	72%	75%
JOINING PROCESS	55%	45%	100%	33%	75%	67%	41%	-	64%	83%	100%

Base: Q6/Q7 All Respondents (Excluding Don't know/ Can't say), Q11 All Respondents (Excluding Not Applicable, Don't know/ Can't say), Q9 All respondents (Excluding Don't know/Can't say), Q20 New YMCA users (Excluding Don't know/ Can't say)

*Small sample size; ** Very small sample size

Note: Regions are based on location selected at Q2a in the questionnaire

■/■ Significantly higher/lower than Total YMCA 2019

REASON FOR ATTENDING A YMCA

REASON FOR ATTENDING	TOTAL (n=798)	NTH (n=253)	GIS (n=14*)	HB (n=35)	TAR (n=27*)	CEN (n=41)	WLG (n=252)	NSN (n=1**)	CHC (n=134)	STH & MID CAN (n=29*)	INV (n=12*)
For out of school care	50%	45%	93%	77%	67%	66%	66%	-	19%	34%	17%
To get fit and healthy	12%	9%	-	-	19%	-	18%	-	15%	10%	8%
To learn/ improve skills	11%	22%	-	-	-	-	-	-	19%	3%	17%
To have fun / To play socially	10%	13%	-	6%	4%	10%	4%	-	16%	24%	-
To gain confidence	3%	2%	-	-	-	10%	1%	-	4%	10%	25%
To socialise	2%	1%	-	3%	-	-	2%	-	2%	10%	-
To have access to facilities and venues	2%	2%	-	-	-	-	2%	-	4%	3%	8%
To get outdoors	2%	<1%	-	-	-	-	2%	-	4%	3%	-
To be involved with My/Their community	1%	<1%	-	-	-	2%	-	100%	1%	-	8%
To be involved as a volunteer	1%	-	-	-	-	-	-	-	7%	-	-
To learn about social responsibility	1%	1%	-	-	-	2%	<1%	-	2%	-	8%
Other (please specify)	6%	6%	7%	14%	11%	10%	5%	-	5%	-	8%

Base: All respondents (n=798)

Q4: What is the **main** reason you/ your child attend/attends you/ their YMCA?

*Small sample size; ** Very small sample size

Note: Regions are based on location selected at Q2a in the questionnaire

SATISFACTION ACROSS REGIONS: MORE THAN SATISFIED WITH KEY DRIVERS

KEY DRIVERS (% more than satisfied)	TOTAL (n=727-792)	NTH (n=230-251)	GIS (n=13*-14*)	HB (n=30-35)	TAR (n=24*-27*)	CEN (n=39-41)	WLG (n=223-250)	NSN (n=1**)	CHC (n=119-133)	STH & MID CAN (n=28*-29*)	INV (n=11*-12*)
Being friendly and welcoming	77%	75%	50%	66%	59%	78%	81%	100%	80%	76%	75%
The quality of the leaders, tutors or instructors	71%	67%	43%	50%	56%	73%	77%	100%	77%	72%	83%
Is fair and provides equal opportunities for all	69%	65%	31%	56%	63%	75%	70%	100%	77%	66%	83%
Being professional and well managed	66%	61%	57%	47%	48%	67%	73%	100%	69%	72%	75%
Providing me/ them the information I/ they need when I/ they need it	62%	57%	36%	48%	54%	59%	68%	100%	70%	61%	67%
Encouraging me/ them to fulfil my/ their potential	62%	59%	36%	41%	46%	62%	65%	100%	73%	69%	75%
Having well maintained venues	60%	56%	29%	50%	48%	58%	62%	100%	66%	79%	83%
Having clean and well maintained facilities e.g. changing rooms, toilets	58%	54%	43%	43%	58%	60%	57%	-	63%	79%	82%

Base: All respondents (Excluding Don't know/not applicable) (n=727-792)
Q10a. How would you rate your/ your child's satisfaction with your/ their YMCA on each of the following...

*Small sample size; ** Very small sample size

Note: Regions are based on location selected at Q2a in the questionnaire

SATISFACTION ACROSS REGIONS: MORE THAN SATISFIED WITH SECONDARY DRIVERS

KEY DRIVERS (% more than satisfied)	TOTAL (n=6**-774)	NTH (n=1**-245)	GIS (n=2**-13*)	HB (n=4**-33)	TAR (n=4**-26*)	CEN (n=1**-41)	WLG (n=1**-246)	NSN (n=1**)	CHC (n=3**-131)	STH & MID CAN (n=1**-29*)	INV (n=6**-12*)
The activity is safe	71%	66%	38%	53%	50%	76%	75%	100%	79%	72%	92%
Providing a safe environment for adults and children	70%	68%	38%	58%	52%	82%	72%	100%	76%	69%	75%
The tutor/leader/instructor encourages a safe environment and has expertise in the activity	70%	67%	23%	56%	52%	78%	73%	100%	75%	69%	92%
Encouraging the respect of others	67%	60%	31%	50%	48%	74%	73%	100%	73%	71%	90%
Encouraging me/them to participate in activities	66%	62%	38%	55%	55%	71%	70%	100%	72%	69%	73%
The ease of accessing the venues e.g. location, parking, opening times	64%	62%	38%	61%	54%	60%	69%	-	61%	83%	75%
Being responsive to my/ their needs and requirements	62%	59%	33%	45%	52%	59%	66%	100%	69%	64%	67%
The availability of programmes/ activities	62%	58%	15%	48%	48%	66%	66%	100%	71%	68%	67%
Youth leadership only statement:											
Enables me/them to contribute to my/their community	86%	100%	-	-	-	100%	-	100%	91%	-	100%

Base: All respondents (Excluding Don't know/not applicable) (n=6**-774)

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

*Small sample size; ** Very small sample size

Note: Regions are based on location selected at Q2a in the questionnaire

SATISFACTION ACROSS REGIONS: MORE THAN SATISFIED WITH SECONDARY DRIVERS

KEY DRIVERS (% more than satisfied)	TOTAL (n=6**-774)	NTH (n=1**-245)	GIS (n=2**-13*)	HB (n=4**-33)	TAR (n=4**-26*)	CEN (n=1**-41)	WLG (n=1**-246)	NSN (n=1**)	CHC (n=3**-131)	STH & MID CAN (n=1**-29*)	INV (n=6**-12*)
Encouraging me/them to connect with others	61%	52%	23%	45%	45%	75%	67%	100%	68%	62%	73%
The equipment is well maintained and safe	61%	56%	23%	45%	40%	66%	63%	100%	71%	69%	83%
Fostering a sense of pride and belonging with our/ their YMCA	60%	58%	36%	44%	48%	53%	64%	100%	63%	70%	73%
Enables you/them to do things with your/their family	57%	52%	-	100%	40%	56%	56%	100%	58%	71%	78%
Encouraging me/them to volunteer	55%	47%	-	80%	50%	38%	56%	100%	62%	59%	67%
Engaging with the local community	52%	51%	17%	47%	55%	37%	49%	100%	65%	61%	50%
KEY DRIVERS (% more than satisfied)	TOTAL (n=579-727)	NTH (n=183-228)	GIS (n=12*-13*)	HB (n=19*-26*)	TAR (n=19*-24*)	CEN (n=31-40)	WLG (n=180-229)	NSN (n=1**)	CHC (n=99-126)	STH & MID CAN (n=23*-29*)	INV (n=12*-11*)
Promotes active and healthy wellbeing	83%	82%	62%	50%	71%	83%	87%	100%	90%	86%	91%
Encourages me/them to participate in other YMCA events	64%	61%	50%	58%	58%	58%	69%	100%	63%	74%	67%

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

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

Q10c. How much do you agree or disagree that your/their YMCA...

*Small sample size; ** Very small sample size

Note: Regions are based on location selected at Q2a in the questionnaire

FOCUS FOR IMPROVEMENT (IF FEES INCREASED)

FOCUS FOR IMPROVEMENT	TOTAL (n=553)	NTH (n=179)	GIS (n=13*)	HB (n=26*)	TAR (n=20*)	CEN (n=26*)	WLG (n=167)	NSN (n=1**)	CHC (n=95)	STH & MID CAN (n=18*)	INV (n=8**)
Helping me/them to develop skills	16%	12%	23%	12%	15%	31%	17%	-	18%	6%	38%
Quality of programmes offered	13%	18%	23%	27%	10%	12%	7%	-	9%	11%	13%
Number of programmes offered	11%	14%	-	-	5%	8%	10%	-	14%	28%	-
Facilities e.g. rooms, changing rooms, toilets	8%	8%	-	-	5%	4%	12%	100%	9%	-	13%
Number of leaders, tutors or instructors	7%	9%	8%	4%	15%	4%	7%	-	3%	-	-
Social activities	6%	3%	15%	12%	5%	4%	7%	-	4%	17%	13%
More community based activities and events	6%	4%	-	12%	10%	12%	5%	-	6%	6%	13%
Access to equipment	5%	7%	-	-	10%	-	4%	-	6%	-	-
Programme venues	3%	3%	15%	-	-	4%	3%	-	1%	-	-
Communications	3%	3%	-	-	5%	-	2%	-	4%	-	-
Management of the YMCA	2%	4%	-	4%	-	-	1%	-	3%	-	-
Providing a safe environment	2%	1%	-	4%	-	-	2%	-	2%	6%	-
Providing greater volunteering options	1%	-	-	-	-	-	1%	-	3%	11%	-
Providing safe activities	1%	1%	-	-	5%	-	3%	-	-	-	-
I don't want them to improve anything if it means my fees need to increase	19%	20%	7%	23%	11%	17%	23%	-	13%	17%	17%

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

Q14. If your/ your child's YMCA was going to focus on improving one of the following aspects, and the fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?




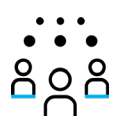
*Small sample size; ** Very small sample size

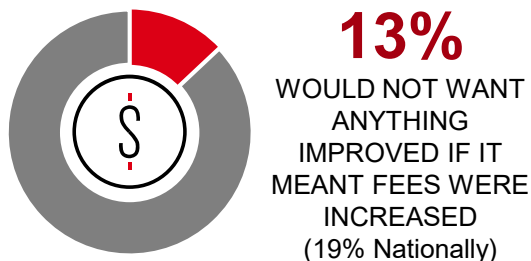
Note: Regions are based on location selected at Q2a in the questionnaire

ACTIVITY PROFILE WITHIN REGIONS



HOW IS THE HOLIDAY PROGRAMME PERCEIVED AT YMCA CHRISTCHURCH?

 Holiday programme	Total YMCA	CHC Holiday Prog	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	46		
Participants (%)	19%	22%	 50% For out of school care	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	78%		
Overall satisfaction	64%	70%	 20% To have fun	#2 Value for money
NPS	+25	+33		
Value for money	73%	83%		
Likelihood to rejoin	76%	54%	 11% To be involved as a volunteer	#3 Being professional and well managed
Joining Process	55%	69%		



TOP 3 ASPECTS FOR IMPROVEMENT*

- 1** QUALITY OF PROGRAMMES OFFERED
- 2** HELPING ME/THEM TO DEVELOP SKILLS
- 3** NUMBER OF PROGRAMMES OFFERED




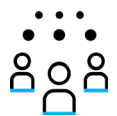
* If fees increased

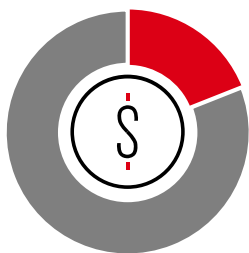
"During the holiday programme there is nothing for the teen children. They need some form of responsibility, peer leadership or be challenged in some form of activity otherwise programme does not meet their needs."

Parent, 13 years



HOW IS INDOOR RECREATION PERCEIVED AT YMCA CHRISTCHURCH?

 Indoor recreation	Total YMCA	CHC Indoor Rec	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	48		
Participants (%)	19%	56%	 33% To get fit and healthy	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	44%		
Overall satisfaction	64%	63%	 31% To learn/ improve skills	#2 Value for money
NPS	+25	+44		
Value for money	73%	69%		
Likelihood to rejoin	76%	83%	 19% To have fun / To play socially	#3 Being professional and well managed
Joining Process	55%	33%		



19%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*




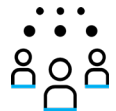
- 1** HELPING ME/THEM TO DEVELOP SKILLS
- 2** NUMBER OF PROGRAMMES OFFERED
- 3** FACILITIES

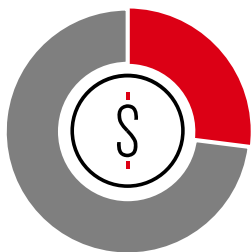
* If fees increased

"The opportunity to climb more than once a week for her age group."
Parent, 8-10 years

HOW IS THE HOLIDAY PROGRAMME PERCEIVED AT YMCA GREATER WELLINGTON?



 Holiday programme	Total YMCA	WLG Holiday Prog	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	49		
Participants (%)	19%	-	 67% For out of school care	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	100%		
Overall satisfaction	64%	71%	 14% To have fun / To play socially	#2 Value for money
NPS	+25	+21		
Value for money	73%	79%		
Likelihood to rejoin	76%	77%	 2% To gain confidence	#3 Being professional and well managed
Joining Process	53%	40%		



27%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*




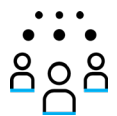
- 1** HELPING ME/THEM TO DEVELOP SKILLS
- 2** NUMBER OF LEADERS, TUTORS OR INSTRUCTORS
- 3** SOCIAL ACTIVITIES

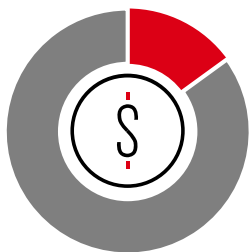
* If fees increased

"To learn outside skills. Encouraging others to gain valuable knowledge confidence together"
Parent, 8-10 years

HOW IS INDOOR RECREATION PERCEIVED AT YMCA GREATER WELLINGTON?



 Indoor recreation	Total YMCA	WLG Indoor Rec	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	47		
Participants (%)	19%	100%	 94% To get fit and healthy	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	-		
Overall satisfaction	64%	77%	 2% To have access to facilities and playing fields	#2 Value for money
NPS	+25	+49		
Value for money	73%	93%		
Likelihood to rejoin	76%	91%	 -	#3 Being professional and well managed
Joining Process	55%	60%		



15%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*



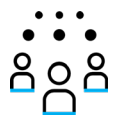
- 1** FACILITIES
- 2** NUMBER OF PROGRAMMES OFFERED
- 3** NUMBER OF LEADERS, TUTORS OR INSTRUCTORS

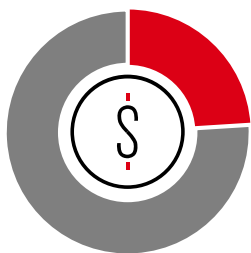
* If fees increased

"If you hike fees there may be some pressure to have makeover of the facilities as the premises are dated."
Participant, 55-59 years

HOW IS AFTER SCHOOL CARE PERCEIVED AT YMCA GREATER WELLINGTON?



After school care	Total YMCA	WLG After school care	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	78		
Participants (%)	19%	1%	 90% For out of school care	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	99%		
Overall satisfaction	64%	62%	 6% To socialise	#2 Value for money
NPS	+25	13%		
Value for money	73%	83%		
Likelihood to rejoin	76%	90%	 1% To have fun / To play socially	#3 Being professional and well managed
Joining Process	55%	44%		



24%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*




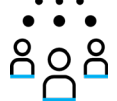
- 1 HELPING ME/THEM TO DEVELOP SKILLS
- 2 NUMBER OF PROGRAMMES OFFERED
- 3 QUALITY OF PROGRAMMES OFFERED

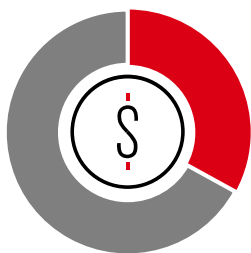
* If fees increased

"Learning games or making things. More variety in the themes of the 'home' days (days where they don't leave the venue) because they have the same ones every holidays. Investing in new equipment like Lego or science kits?"
Parent, 8-10 years

HOW IS BEFORE SCHOOL CARE PERCEIVED AT YMCA GREATER WELLINGTON?



 Before school care	Total YMCA	WLG Before school care	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	45	 98% For out of school care	#1 The quality of leaders, tutors or instructors
Participants (%)	19%	2%		
Parents of participants (%)	81%	98%		
Overall satisfaction	64%	66%	 -	#2 Value for money
NPS	+25	+41	-	
Value for money	73%	58%		
Likelihood to rejoin	76%	80%	 -	#3 Being professional and well managed
Joining Process	55%	-	-	



33%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*




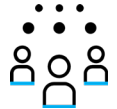
- 1** SOCIAL ACTIVITIES
- 2** NUMBER OF COACHES OR INSTRUCTORS
- 3** HELPING ME/THEM TO DEVELOP SKILLS

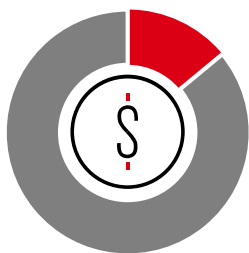
* If fees increased

"More team building or help towards those children with social skill problems."
Parent, 5-7 years

HOW IS THE HOLIDAY PROGRAMME PERCEIVED AT YMCA NORTH?



 Holiday programme	Total YMCA	NTH Holiday Prog	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	44		
Participants (%)	19%	14%	 64% For out of school care	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	86%		
Overall satisfaction	64%	66%	 7% To get fit and healthy	#2 Value for money
NPS	+25	+9		
Value for money	73%	74%		
Likelihood to rejoin	76%	86%	 7% To have fun / To play socially	#3 Being professional and well managed
Joining Process	55%	17%		



14%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*




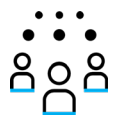
- 1** NUMBER OF PROGRAMMES OFFERED
- 2** QUALITY OF PROGRAMMES OFFERED
- 3** FACILITIES E.G. CLUB ROOMS, CHANGING ROOMS, TOILETS

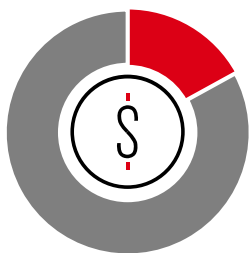
* If fees increased

"More sports focused activities at holiday programs. He's not really interested in arts and crafts."
Parent, 5-7 years

HOW IS INDOOR RECREATION PERCEIVED AT YMCA NORTH?



 Indoor recreation	Total YMCA	NTH Indoor Rec	MAIN REASONS FOR ATTENDING	KEY DRIVERS OF EXPERIENCE (Based on overall regression)
Respondents (n=)	798	101		
Participants (%)	19%	9%	 50% To learn/ improve skills	#1 The quality of leaders, tutors or instructors
Parents of participants (%)	81%	91%		
Overall satisfaction	64%	67%	 23% To have fun / To play socially	#2 Value for money
NPS	+25	+34		
Value for money	73%	76%		
Likelihood to rejoin	76%	73%	 15% To get fit and healthy	#3 Being professional and well managed
Joining Process	55%	44%		



17%
WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED
(19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*


- 1** QUALITY OF PROGRAMMES OFFERED
- 2** HELPING ME/THEM TO DEVELOP SKILLS
- 3** NUMBER OF PROGRAMMES OFFERED

* If fees increased

"More structured programmes with levels of improvement and advancement."
Parent, less than 5 years

HOW IS AFTER SCHOOL CARE PERCEIVED AT YMCA NORTH?



 After school care	Total YMCA	NTH After school care
Respondents (n=)	798	67
Participants (%)	19%	7%
Parents of participants (%)	81%	93%
Overall satisfaction	64%	56%
NPS	+25	+4
Value for money	73%	61%
Likelihood to rejoin	76%	75%
Joining Process	55%	57%

MAIN REASONS FOR ATTENDING



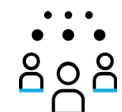
82%

For out of school care



3%

To learn about social responsibility



3%

To learn/ improve skills

KEY DRIVERS OF EXPERIENCE (Based on overall regression)

#1

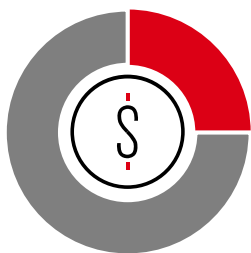
The quality of leaders, tutors or instructors

#2

Value for money

#3

Being professional and well managed



25%

WOULD NOT WANT ANYTHING IMPROVED IF IT MEANT FEES WERE INCREASED (19% Nationally)

TOP 3 ASPECTS FOR IMPROVEMENT*

1

QUALITY OF PROGRAMMES OFFERED

2

NUMBER OF PROGRAMMES OFFERED

3

ACCESS TO EQUIPMENT

* If fees increased

"I would like to see more planned activities like I have seen at a lot of other Oscar programmes, it's not hard to set up a physical game or a planned engaging arts and crafts and using themes like Easter for example."
Parent, 5-7 years

DEMOGRAPHIC DIFFERENCES

PERFORMANCE BY AGE

KEY MEASURE	TOTAL (n=798)	7 years and under (n=53-251)	8-10 years (n=25*-248)	11-12 years (n=15*-101)	Secondary (13-18 years) (n=17*-76)	Young Adults (19-34 years) (n=6**-26*)	Adults (35-54 years) (n=7**-59)	Older Adults (55+) (n=3**-33)
% of respondents		32%	31%	13%	10%	3%	7%	4%
SATISFACTION (% more than satisfied)	64%	66%	58%	46%	86%	76%	69%	76%
NPS (% promoters less % detractors)	+25	+28	+15	+3	+57	+42	+32	+48
VALUE FOR MONEY (% agree or strongly agree)	73%	69%	70%	68%	89%	69%	82%	84%
LIKELIHOOD TO DO AGAIN (% likely or very likely)	76%	80%	75%	63%	73%	85%	80%	91%
JOINING PROCESS (% more than satisfied)	55%	45%	56%	60%	71%	83%	29%	100%

Base: Q6/Q7 All Respondents (Excluding Don't know/ Can't say), Q11 All Respondents (Excluding Not Applicable, Don't know/ Can't say), Q9 All respondents (Excluding Don't know/Can't say), Q20 New YMCA users (Excluding Don't know/ Can't say) *Small sample size; ** Very small sample size

■/■ Significantly higher/lower than Total YMCA 2019

HOW DO KEY AGE BRACKETS DIFFER?

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



- ▶ Belong for *out of school care* (66% cf. 50%)
- ▶ Participate in *before school care* four or more times a week (62% cf. 48%), *indoor recreation* once a week or less (90% cf. 68%).



- ▶ Belong for *out of school care* (66% cf. 50%)
- ▶ Participate in *indoor recreation* once a week or less (94% cf. 68%)
- ▶ Be dissatisfied/very dissatisfied with *encouraging me to fulfil my potential* (10% cf. 7%), *is fair and provides equal opportunities* (8% cf. 5%), *fostering a sense of pride and belonging with our/their YMCA* (9% cf. 6%)
- ▶ If fees increased for there to be a focus on *helping me to develop skills* (21% cf. 16%).



- ▶ Belong to *gain confidence* (7% cf. 3%)
- ▶ Be dissatisfied/very dissatisfied with *the tutor/ leader/ instructor encourages a safe environment and has expertise in the activity* (9% cf. 4%), *fostering a sense of pride and belonging with our YMCA* (11% cf. 6%), *being responsive to my needs and requirements* (12% cf. 7%), *the availability of programmes/ activities* (11% cf. 6%)
- ▶ If fees increased for there to be a focus on *providing a safe environment* (5% cf. 2%).



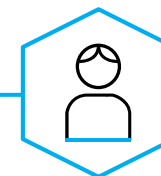
- ▶ Belong to *socialise* (7% cf. 2%), *to have fun* (25% cf. 10%), *to gain confidence* (8% cf. 3%), *to be involved as a volunteer* (13% cf. 1%) or *to learn about social responsibility* (4% cf. 1%)
- ▶ Be more than satisfied with their YMCA *being friendly and welcoming* (87% cf. 77%), *having clean and well maintained facilities* (74% cf. 58%), *having well maintained venues* (74% cf. 60%), *encouraging me to fulfil my potential* (76% cf. 62%), *encouraging the respect of others* (80% cf. 67%), *fostering a sense of pride and belonging with our YMCA* (72% cf. 60%), *engaging with the local community* (67% cf. 52%), *being responsive to my needs and requirements* (76% cf. 62%), *encouraging me to participate in activities* (79% cf. 66%), *encouraging me to volunteer* (68% cf. 55%), *encouraging me to connect with others* (75% cf. 61%), *the tutor/ leader/ instructor encourages a safe environment and has expertise in the activity* (83% cf. 70%) and *the equipment is well maintained and safe* (78% cf. 61%)
- ▶ If fees increased for there to be a focus on *providing greater volunteering options* (9% cf. 1%).



- ▶ Belong to *get fit and healthy* (64% cf. 12%) or *to have access to facilities* (8% cf. 2%)
- ▶ Participate in *indoor recreation* four or more times a week (15% cf. 6%)
- ▶ Be more than satisfied with *engaging the local community* (69% cf. 52%)
- ▶ If fees increased for there to be a focus on *facilities* (30% cf. 8%).

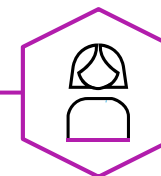
PERFORMANCE ACROSS GENDER

KEY MEASURE	TOTAL (n=126-791)	MALE (n=64-369)	FEMALE (n=62-418)
SATISFACTION (% more than satisfied)	64%	65%	64%
NPS (% promoters less % detractors)	+25	+27	+25
VALUE FOR MONEY (% agree or strongly agree)	73%	76%	71%
LIKELIHOOD TO DO AGAIN (% likely or very likely)	76%	77%	75%
JOINING PROCESS (% more than satisfied)	55%	58%	52%



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

- ▶ Belong for *out of school care* (57% cf. 44% females)
- ▶ Participate in indoor recreation once a week or less (79% cf. 64%)
- ▶ If fees increased, for the focus for improvement to be one *helping me to develop skills* (21% cf. 11%).



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

- ▶ Belong to *get fit and healthy* (17% cf. 7% males)
- ▶ Participate in before school care once a week or less (31% cf. 13%) or indoor recreation two to three times a week (27% cf. 14%)
- ▶ Be dissatisfied/extremely dissatisfied with *having clean and well maintained facilities* (7% cf. 3%).

PERFORMANCE ACROSS ETHNICITY

KEY MEASURE	TOTAL (126-791)	NET European (n=91-620)	Māori (n=27*-147)	NET Pasifika (n=10*-39)	NET Asian & Indian (n=18*-88)
SATISFACTION (% more than satisfied)	64%	64%	60%	62%	72%
NPS (% promoters less % detractors)	+25	+22	+21	+33	+42
VALUE FOR MONEY (% agree or strongly agree)	73%	73%	66%	72%	75%
LIKELIHOOD TO DO AGAIN (% likely or very likely)	76%	75%	73%	74%	85%
JOINING PROCESS (% more than satisfied)	55%	57%	59%	60%	50%

Base: Q6/Q7 All Respondents (Excluding Don't know/ Can't say), Q11 All Respondents (Excluding Not Applicable, Don't know/ Can't say), Q9 All respondents (Excluding Don't know/Can't say), Q20 New YMCA users (Excluding Don't know/ Can't say), *Small sample size

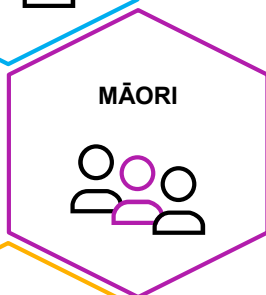
■/■ Significantly higher/lower than Total YMCA 2019

HOW DO THE LARGEST CULTURAL GROUPS DIFFER?

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



- ▶ If fees increased for the focus of improvement to be on *facilities* (11% cf. 8%).



- ▶ To belong to their YMCA for *out of school care* (63% cf. 50%)
- ▶ If fees increased for the focus of improvement to be on *more community based activities and events* (13% cf. 6%).



- ▶ To belong to their YMCA *to socialise* (8% cf. 2%).



- ▶ To belong to their YMCA *to learn/improve skills* (22% cf. 11%)
- ▶ To agree/strongly agree that their YMCA *encourages me to participate in other YMCA events* (81% cf. 64%)
- ▶ If fees increased for the focus for improvement to be on *the number of programmes offered* (19% cf. 11%) or *quality of programmes offered* (22% cf. 13%).

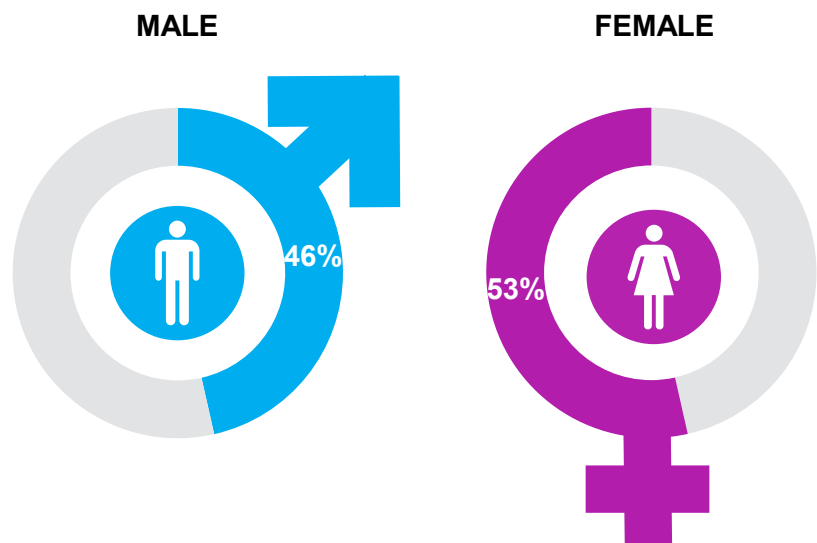
Base: All Respondents

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

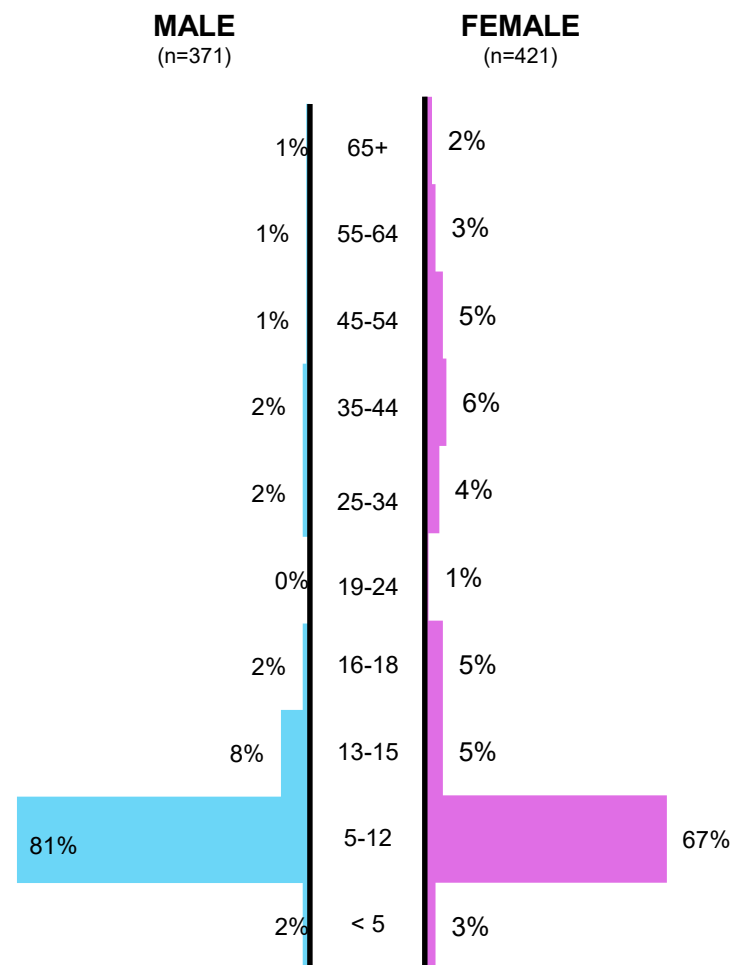
Note: Respondents can identify with more than one ethnicity, therefore results may add up to more than 100%.

SAMPLE PROFILE

AGE-GENDER DISTRIBUTION



GENDER (Q25)	TOTAL (n=798)	PARTICIPANT (n=152)	PARENT (n=646)
MALE	46%	24%	52%
FEMALE	53%	75%	48%
GENDER DIVERSE	1%	1%	1%



PERCENTAGE IN EACH AGE GROUP

AGE & ETHNICITY

AGE (Q22)	N=	TOTAL 2019 (n=798)
Less than 5 years	18	2%
NET 5-12 years	586	73%
NET 13-18 years	76	10%
NET 19-24 years	4	0%
25-34 years	22	3%
35-44 years	33	4%
45-54 years	26	3%
55-64 years	17	2%
65+ years	16	3%
ETHNICITY (Q34)	N=	TOTAL 2019 (n=798)
NET European/Pakeha	624	78%
Māori	148	19%
NET Pasifika	39	5%
Samoan	19	2%
NET Asian & Indian	88	11%
Chinese	32	4%
Indian	26	3%
Other	48	6%

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

REGION OF RESIDENCE

REGION (Q23)	N=798	TOTAL 2019 (n=798)
Northland	-	-
Auckland	148	19%
Waikato	93	12%
Bay of Plenty	15	2%
Gisborne	14	2%
Hawke's Bay	35	4%
Taranaki	28	4%
Manawatu	10	1%
Whanganui	31	4%
Wellington-Wairarapa	248	31%
Tasman	-	-
Nelson	1	0%
Marlborough	-	-
West Coast	1	0%
Canterbury	161	20%
Otago	-	-
Southland	12	2%
Outside of New Zealand	1	0%

MEMBERSHIP/USAGE TENURE

MEMBERSHIP TENURE (Q3)	N=	TOTAL 2019 (n=798)
Less than 1 year	131	16%
1-2 years	363	45%
3-5 years	235	29%
6-10 years	57	7%
More than 10 years	12	2%

ACTIVITY

ACTIVITY	N=	TOTAL 2019 (n=798)
After school-care	198	25%
Before school-care	91	11%
Outdoor Recreation	34	4%
Holiday Programmes	199	25%
Camps	48	6%
Youth Leadership	25	3%
Indoor Recreation	203	25%

REGION

REGION	N=798	TOTAL 2019 (n=798)
YMCA North	253	32%
YMCA Gisborne	14	2%
YMCA Hawke's Bay	35	4%
YMCA Taranaki	27	3%
YMCA Central	41	5%
YMCA Greater Wellington	252	32%
YMCA Nelson	1	<1%
YMCA Christchurch	134	17%
YMCA South & Mid Canterbury	29	4%
YMCA Invercargill	12	2%

Note: Regions are based on location selected at Q2a in the questionnaire

ACTIVITY IN REGION

ACTIVITY IN REGION	After school-care (n=198)	Before school-care (n=91)	Outdoor Recreation (n=34)	Holiday Programmes (n=199)	Camps (n=48)	Youth Leadership (n=25*)	Indoor Recreation (n=203)
YMCA North	34%	29%	18%	18%	17%	4%	50%
YMCA Gisborne	5%	-	-	2%	-	-	-
YMCA Hawke's Bay	8%	8%	-	6%	2%	-	-
YMCA Taranaki	7%	4%	-	3%	-	-	2%
YMCA Central	6%	10%	12%	7%	6%	4%	-
YMCA Greater Wellington	39%	49%	35%	25%	40%	8%	23%
YMCA Nelson	-	-	-	-	-	4%	-
YMCA Christchurch	1%	-	26%	23%	35%	48%	24%
YMCA South & Mid Canterbury	-	-	6%	13%	-	4%	-
YMCA Invercargill	1%	-	3%	1%	-	28%	1%

ACTIVITY DEMOGRAPHICS

AGE (Q22)	After school-care (n=198)	Before school-care (n=91)	Outdoor Recreation (n=34)	Holiday Programmes (n=199)	Camps (n=48)	Youth Leadership (n=25*)	Indoor Recreation (n=203)
7 years and under	40%	54%	9%	32%	8%	-	27%
8-10 years	45%	37%	38%	30%	25%	-	21%
11-12 years	11%	7%	18%	20%	31%	8%	6%
13-18 years	1%	-	21%	15%	23%	76%	4%
19-34 years	1%	-	3%	1%	-	4%	10%
35+ years	3%	2%	12%	4%	13%	12%	32%
ETHNICITY (Q34)							
NET European/Pakeha	72%	80%	76%	74%	94%	84%	84%
Māori	25%	19%	15%	25%	13%	12%	9%
NET Pasifika	8%	4%	6%	4%	6%	-	3%
Samoan	5%	1%	-	1%	4%	-	2%
NET Asian & Indian	13%	8%	18%	10%	6%	12%	12%
Chinese	3%	1%	6%	4%	6%	4%	6%
Indian	4%	5%	6%	3%	-	-	3%
Other	4%	7%	3%	6%	2%	8%	4%

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 and recreation systems 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 and recreation systems (including Sport NZ).

This part of the VOP programme is for National Partners to survey their members/users (i.e. participants and parents of participants) to understand the participant experience with their club/centre/YMCA.

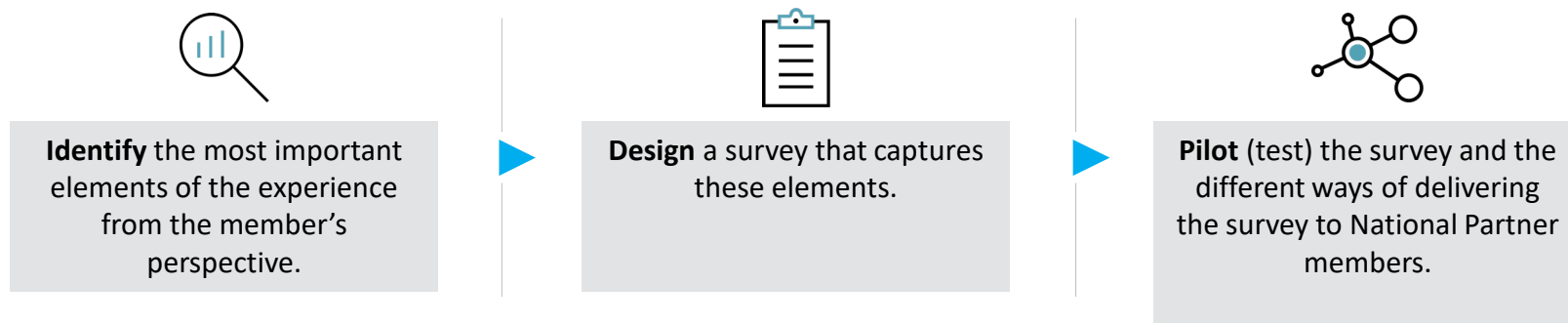
In future, the programme may also roll out to cover events/ tournaments, RSTs/RSDs, TAs/ Councils, activities and even children doing sport at school.

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/users, helping them to understand how different interactions are perceived and what is really important to get right in order to retain and grow membership/usage.

DEVELOPMENT OF THE VOP PROGRAMME

While some work had previously been undertaken by Sport NZ and National Partners 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 participants 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 National Partners, Nielsen reviewed the survey tools and created a Survey Guide.

METHODOLOGY OF VOP YMCA SURVEY 2019

SAMPLE



YMCA supplied Nielsen a database consisting of 9,463 contacts from three main regions – YMCA North, YMCA Greater Wellington, YMCA Christchurch. A list of regions and YMCAs was also provided.

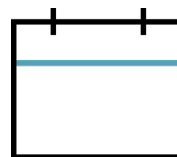
APPROACH



An email invitation, containing an open link to the database of 72 contacts and a personalised* online link to 9391 contacts, was sent by Nielsen.

YMCAs throughout the country also distributed the open link via their own communication channels (e.g. Facebook, newsletters).

FIELDWORK

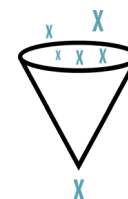


The survey was conducted between 09 April and 03 May 2019.

Reminders were sent during fieldwork on 18 April and 30 April.

Average length was just under 12 minutes.

RESULT



A total of 798 YMCA respondents nationwide completed the survey, consisting of 152 participants and 646 parents of participants/children under the age of 16.

This gives a maximum margin of error on the Total YMCA result of $\pm 3.5\%$.

* 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 (or there was not background data attributed to the email e.g. name, YMCA, region) were attributed to the same email address and the invite encouraged them to share the survey with others.

NOTES TO THIS REPORT

STATISTICAL SIGNIFICANCE

Statistically significant differences are highlighted or commented on in this report. Where no highlighting has been used (or no commentary about a sub-group included), it may safely be assumed that differences are not statistically significant or they are not pertinent.

Statistically significant differences in this report are significant at the 95% confidence level. That is, we are 95% confident results are not just normal expected variances that result from talking to a different sample within the same population (note: the smaller the sample size, the higher the expected variance between samples and less likely that there will be statistically significant differences).

Statistical significance is reported in the following ways:

▲ / ▼ The sub-group is significantly higher / lower than the Total YMCA

■ / ■ The sub group is significantly higher/ lower than the Total YMCA

TOTAL

When comparing results, 'cf.' is used as an abbreviation of 'compare'.

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.

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 YMCA. The dependent variable for the regression model is **recommendation** (the likelihood of a respondent to recommend their YMCA activity to someone interested in participating). 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 – that were answered by all respondents.



The [drivers of recommendation chart](#) illustrates the impact of each attribute/ driver on a respondent's likelihood to recommend their YMCA. 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 YMCAs should focus, in order to improve recommendation.

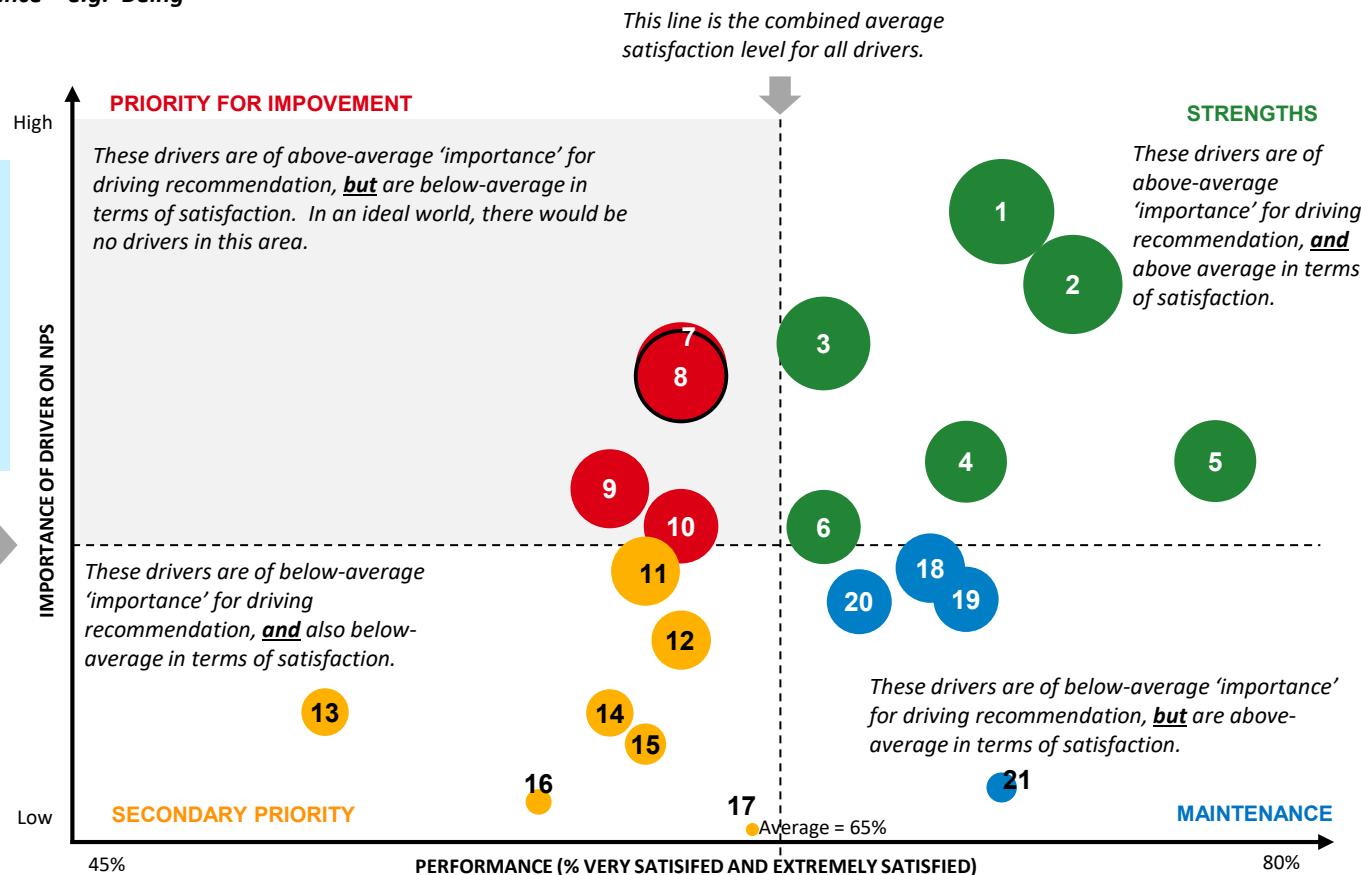
* **Multi-collinearity** exists whenever an independent variable is highly correlated with one or more of the other independent variables in a multiple regression equation. **Multi-collinearity** is a **problem** because it undermines the statistical significance of an independent variable.

GUIDANCE ON HOW TO INTERPRET THIS CHART

Note: Each 'bubble' in this graph refers to a 'driver' (or attribute) of the YMCA experience – e.g. 'Being friendly and welcoming'.

The higher each 'driver' sits on the vertical axis, the more 'important' it is in terms of the relationship with recommending their YMCA activity to others (NPS). I.e. For a driver towards the top there is a relatively strong relationship between satisfaction with this driver and whether or not people will recommend their YMCA activity.

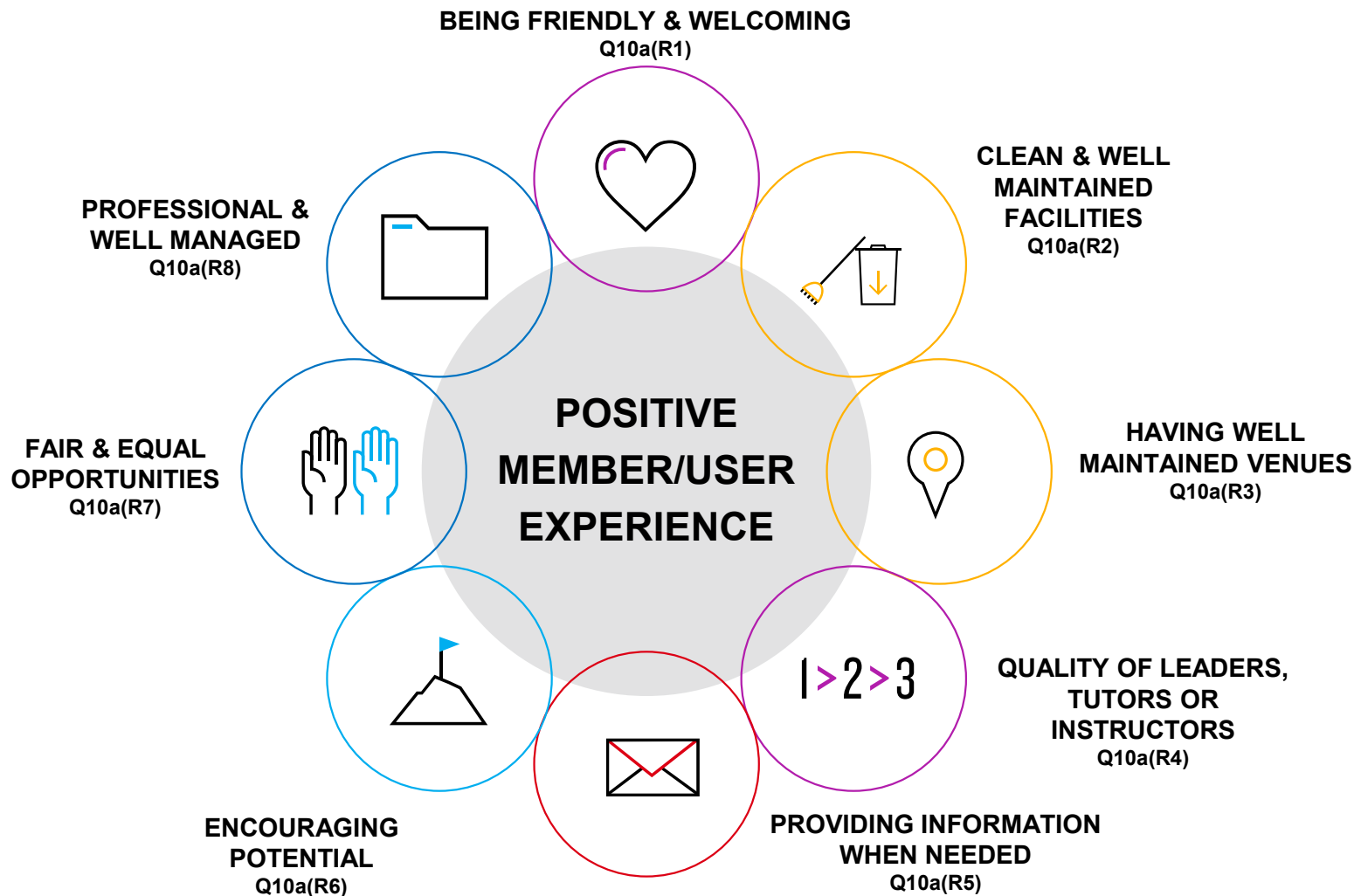
This line represents the average in terms of level of 'importance' for driving recommendation.



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

DRIVERS OF EXPERIENCE

The qualitative stage, undertaken as part of the development of the VOP questionnaire, identified seven drivers that influence the participant's experience. After the initial pilot of the VOP questionnaire these were expanded to nine core drivers (of which only eight have been used for YMCA). The question numbers that relate to each driver are shown below.



DRIVERS OF THE YMCA EXPERIENCE, CTD.

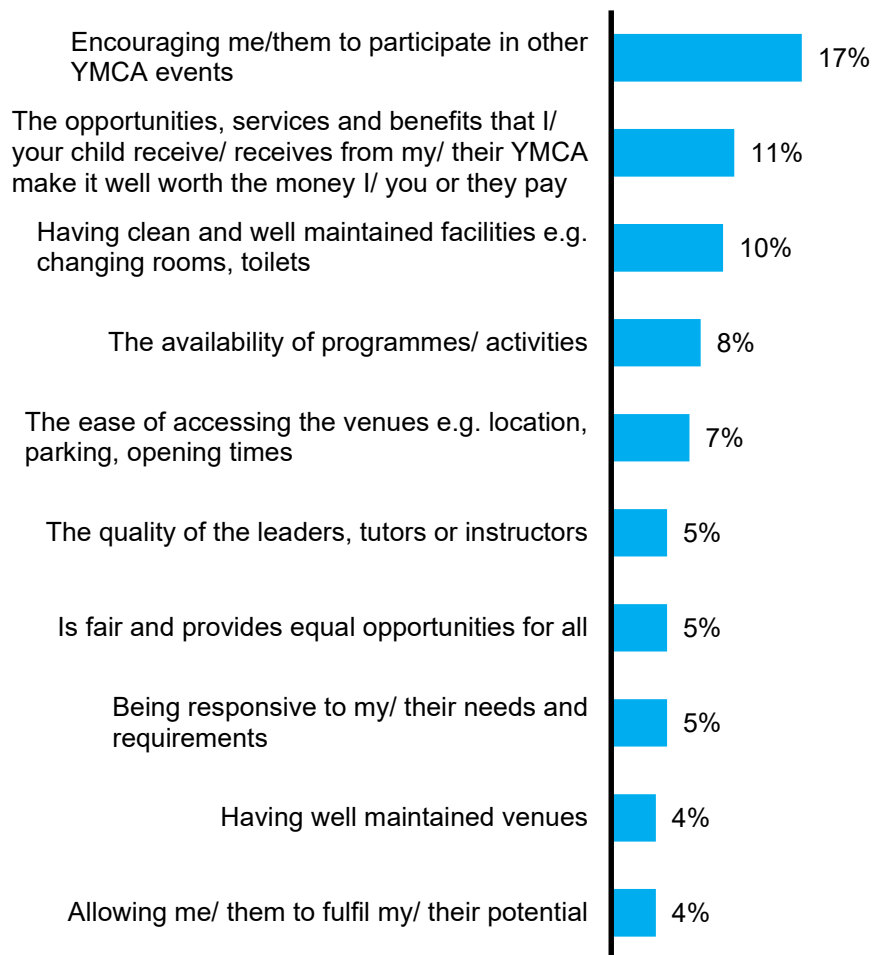
As well as the eight 'core' drivers of the YMCA experience, based on the pilot results and in consultation with National Partners the VOP survey also covers a number of secondary drivers. These are shown below with the associated question number.

- ▶ Value for money (Q11)
- ▶ Encouraging the respect of others (Q10b-R1)
- ▶ The ease of accessing the venues (Q10b-R2)
- ▶ Fostering a sense of pride and belonging with the YMCA (Q10b-R3)
- ▶ Engaging with the local community (Q10b-R4)
- ▶ Being responsive to needs and requirements (Q10b-R5)
- ▶ Providing a safe environment for adults and children (Q10b-R7).

In addition, YMCA included specific drivers considered important or topical for YMCA. These include:

- ▶ The availability of programmes/ activities (Q10b-R23)
- ▶ Encouraging to participate in activities (Q10b-24)
- ▶ Encouraging to volunteer (Q10b-R25)
- ▶ Encouraging to connect with others (Q10b-R26)
- ▶ Enabling to do things with your family (Q10b-R27)
- ▶ Enabling to contribute to my/their community (Q10b-R28)
- ▶ The tutor/leader/instructor encourages a safe environment and has expertise in the activity (Q10-R29)
- ▶ The activity is safe (Q10b-R30)
- ▶ The equipment is well maintained and safe (Q10b-R31).

OVERALL, RESPONDENTS ARE LEAST SATISFIED WITH ENCOURAGEMENT TO PARTICIPATE IN OTHER YMCA EVENTS



Base: All respondents who are dissatisfied/extremely dissatisfied or disagree/strongly disagree (n=223)
 Q12a. Thinking about what you rated lower in previous questions, please select which one aspect of your/ your child's YMCA that you/ they are **least** satisfied with?

Note: Only top ten areas shown;

