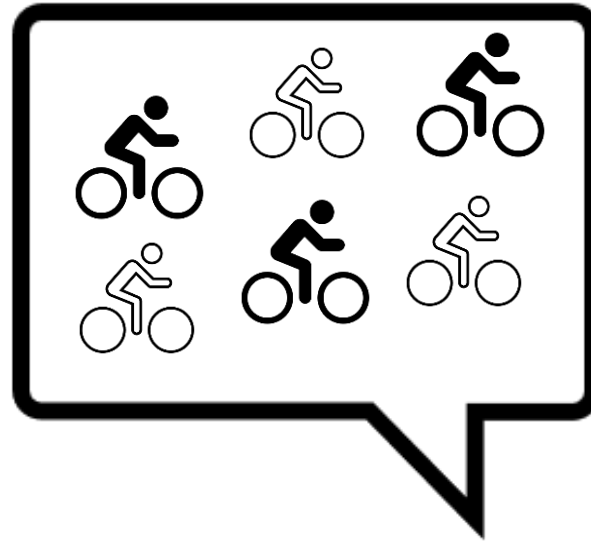

STAKEHOLDER FEEDBACK OVERVIEW

WHO WE HEARD FROM



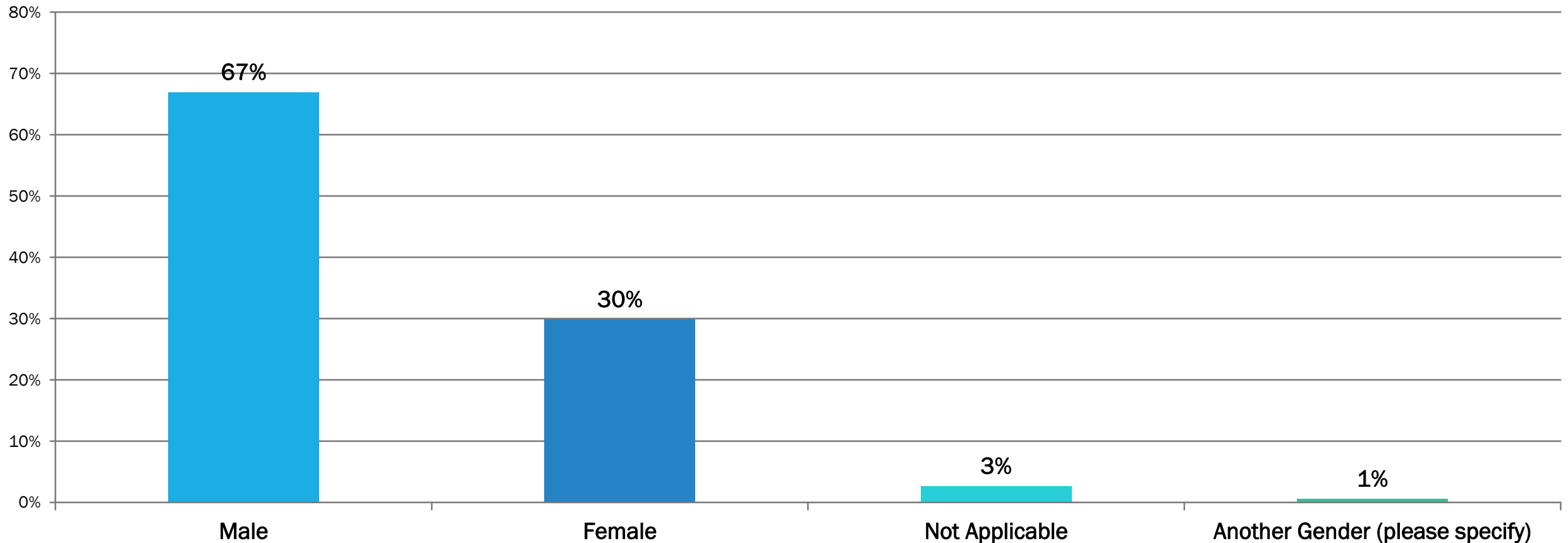
STRATEGIC REALITY

WHO WE HEARD FROM

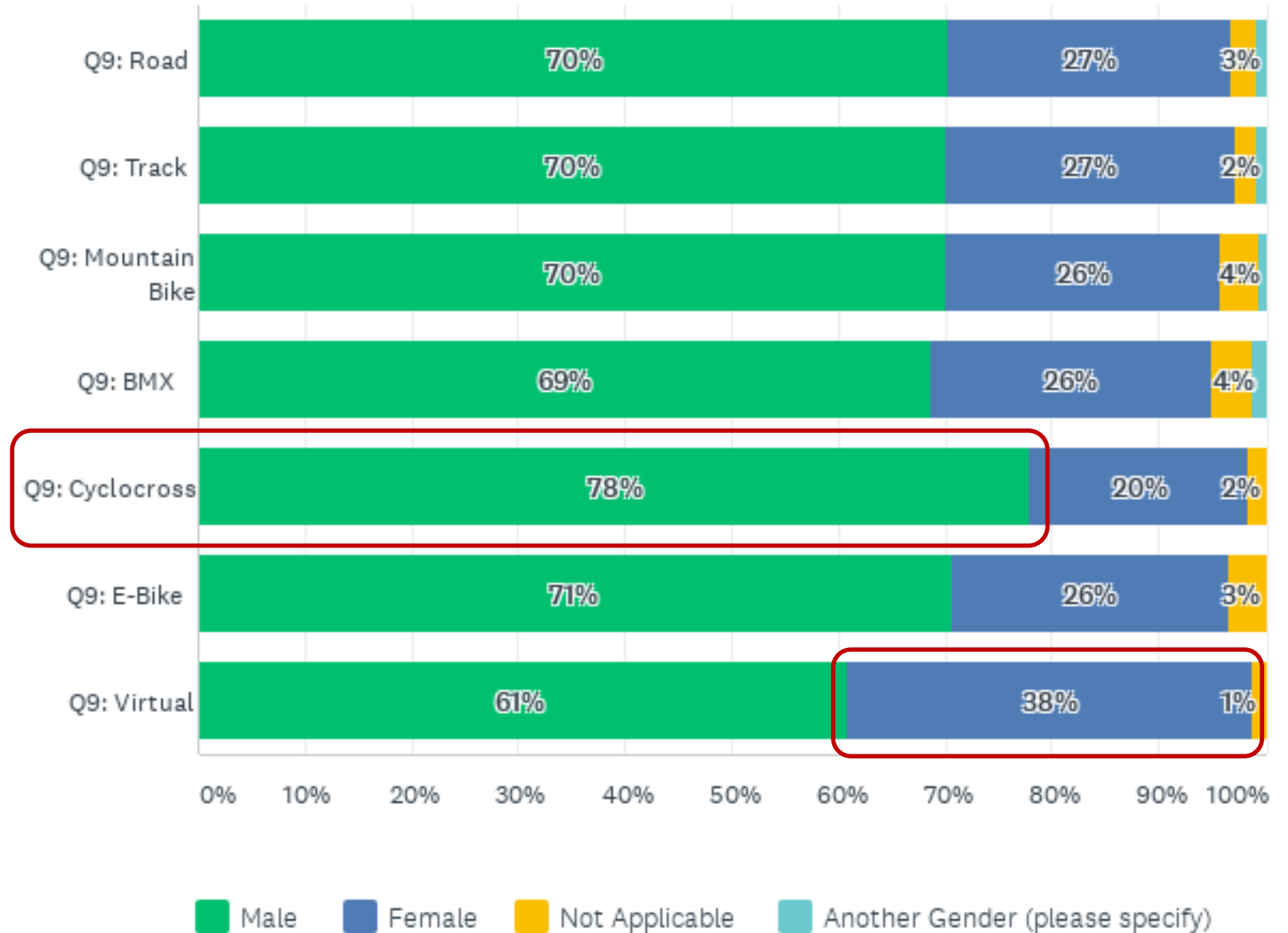


583
cycling
people

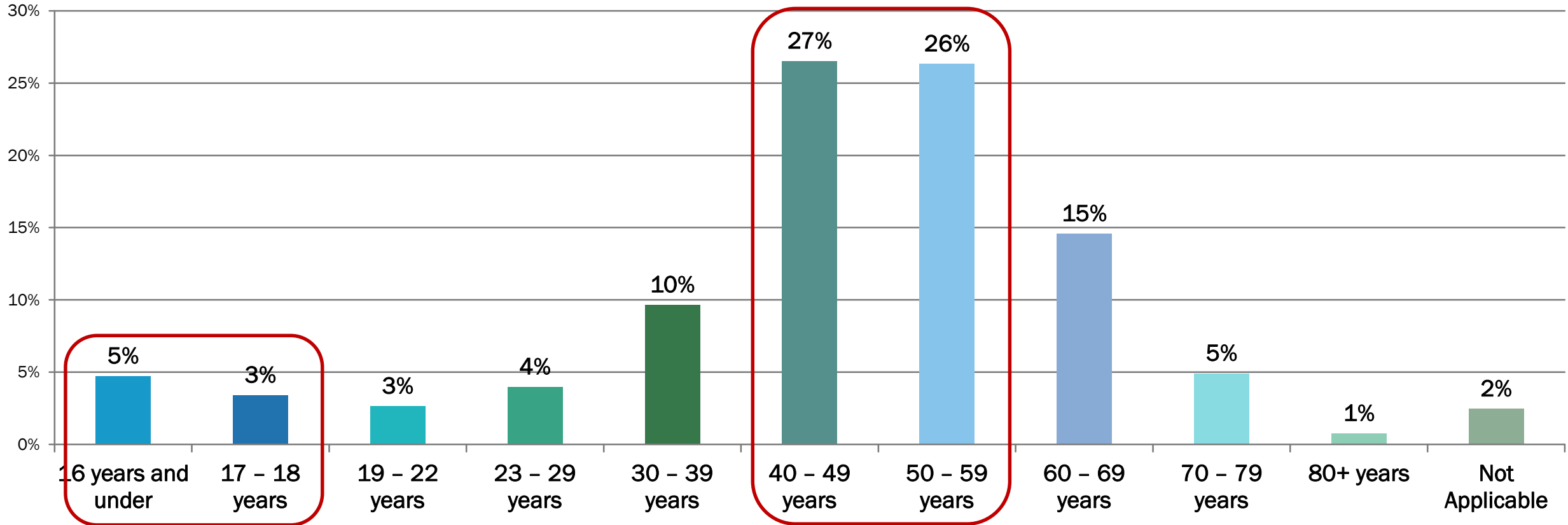
REASONABLE GENDER DIVERSITY ACROSS RESPONDENTS. 30% FEMALES RESPONDED OUT OF A MEMBERSHIP BASE THAT IS 21% FEMALE, 79% MALE.



LOOKING AT RESPONDENTS BY GENDER DIVERSITY AND BIKE TYPE, THERE ARE MORE FEMALES (38%) AS A PROPORTION IN THE VIRTUAL CYCLING SPACE, AND MORE MALES (78%) IN CYCLOCROSS

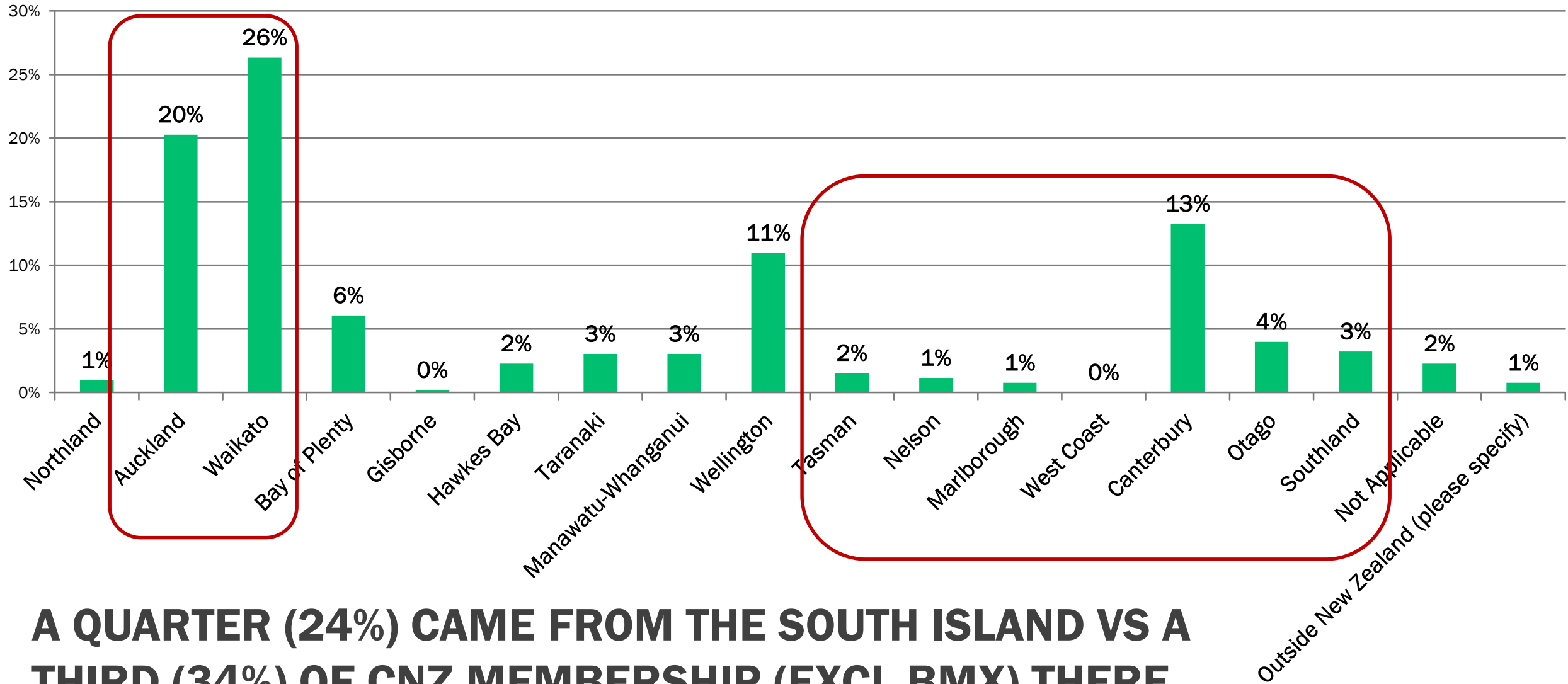


**RESPONDENTS ACROSS A SPREAD OF AGES.
OVER HALF (51%) WERE 40-60 YEAR OLDS.**



**ONLY A SMALL RESPONSE FROM YOUTH, WITH 8% FROM THESE U19'S
COMPARED TO 46% OF THE CNZ MEMBERSHIP BASE.
COMMENTS REFLECT THAT PARENTS OF THIS AGE GROUP HAVE RESPONDED.**

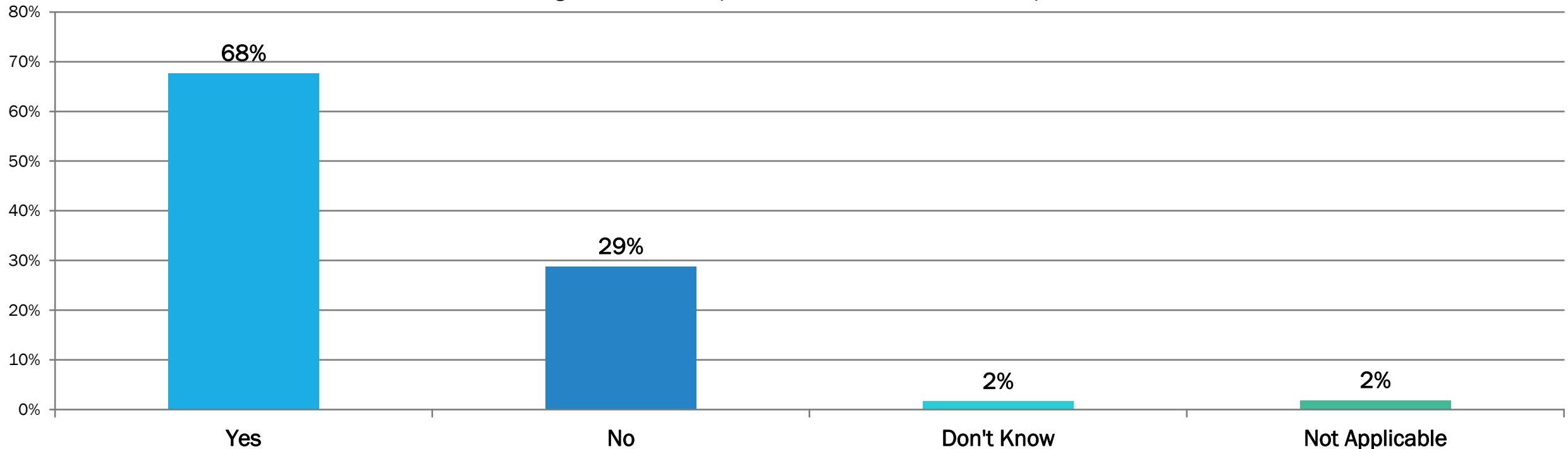
NEARLY HALF THE RESPONDENTS LIVE IN AUCKLAND & WAIKATO (46%), VS 36% OF CNZ MEMBERSHIP (EXCL BMX) BEING FROM THERE



A QUARTER (24%) CAME FROM THE SOUTH ISLAND VS A THIRD (34%) OF CNZ MEMBERSHIP (EXCL BMX) THERE

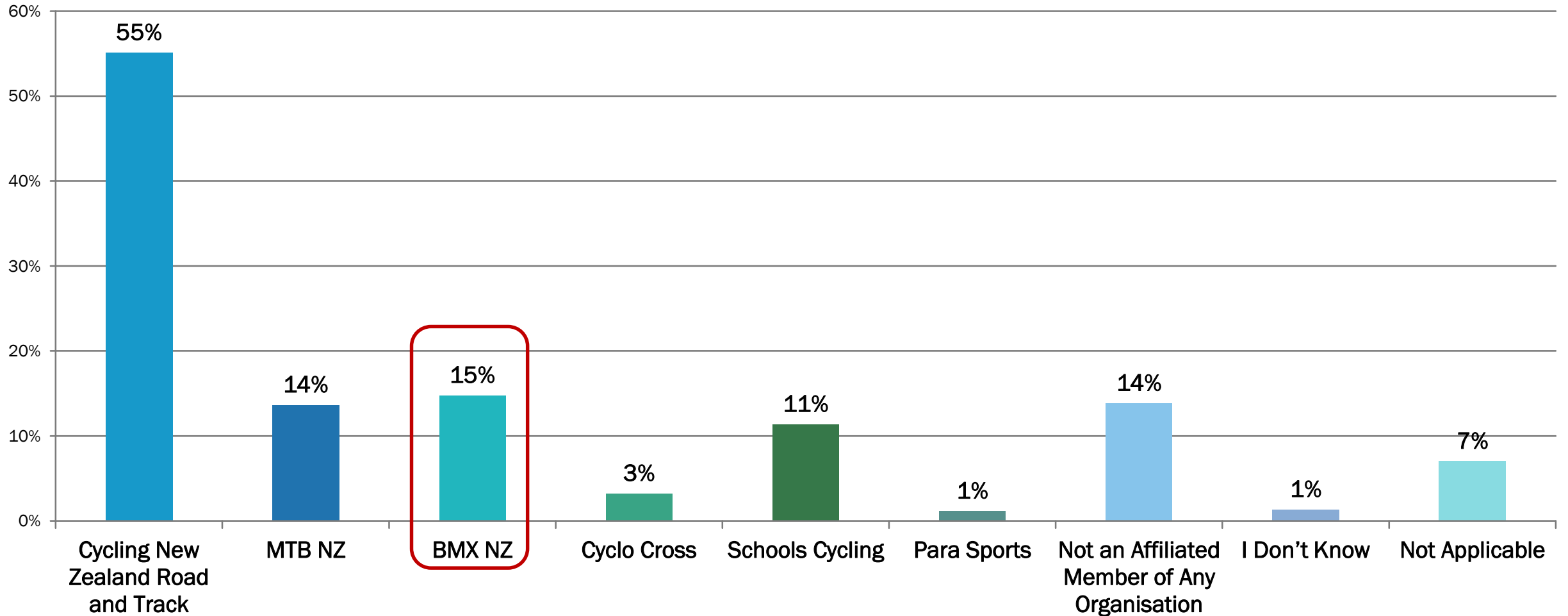
OVER TWO THIRDS (68%) ARE CURRENT LICENCE HOLDERS. THIS REFLECTS 396 MEMBERS OUT OF CNZ'S 4861 MEMBERSHIP BASE, OR 8% RESPONSE RATE.

Do you currently have a Cycling New Zealand licence or licence from one of our Member Organisations (MTB NZ, BMX NZ, etc.)?



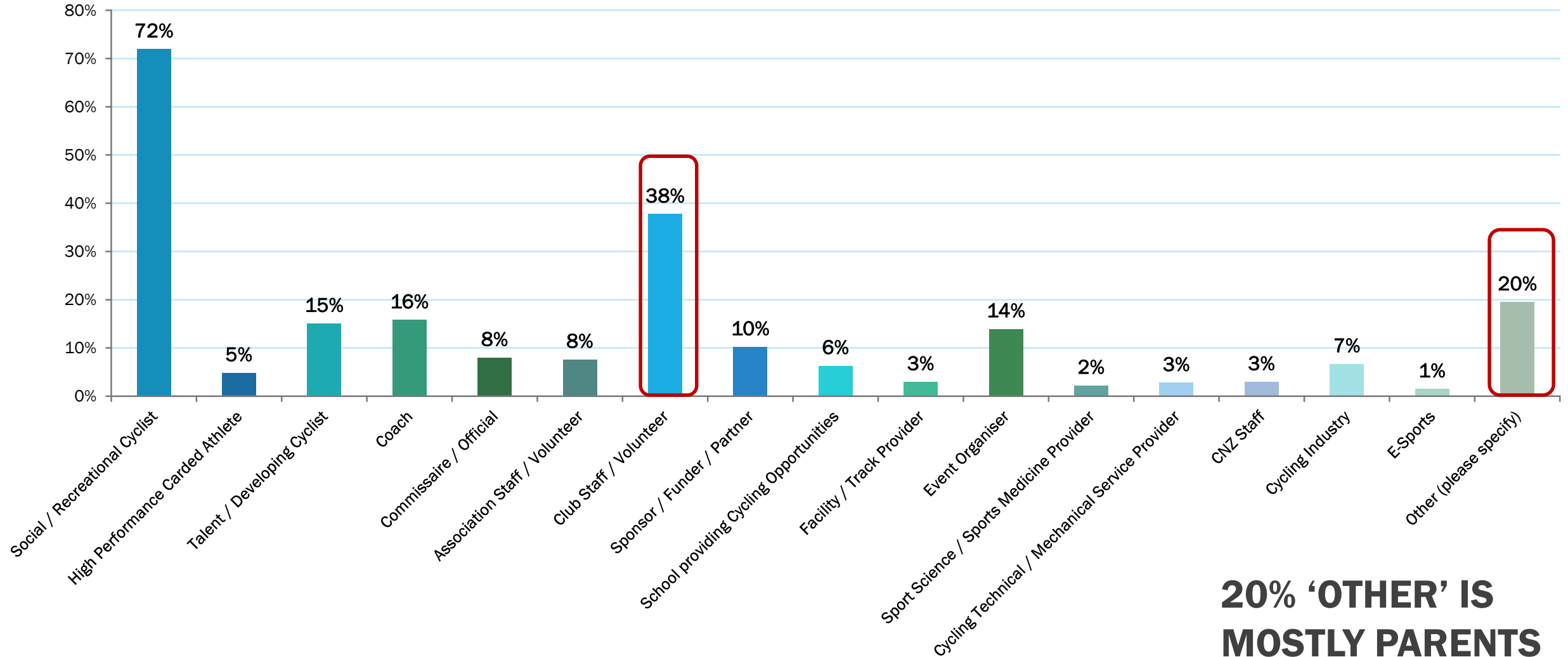
YOU ALSO HEARD FROM 187 PEOPLE THAT ARE NON-LICENSED. OF THESE, 66% (~123 PEOPLE) ARE NOT AN AFFILIATED MEMBER WITH ANY MEMBER ORG.

**OVER HALF (55%) ARE AFFILIATED MEMBERS WITH ROAD & TRACK WHICH
ALIGNS TO CNZ MEMBERSHIP OF 52%**

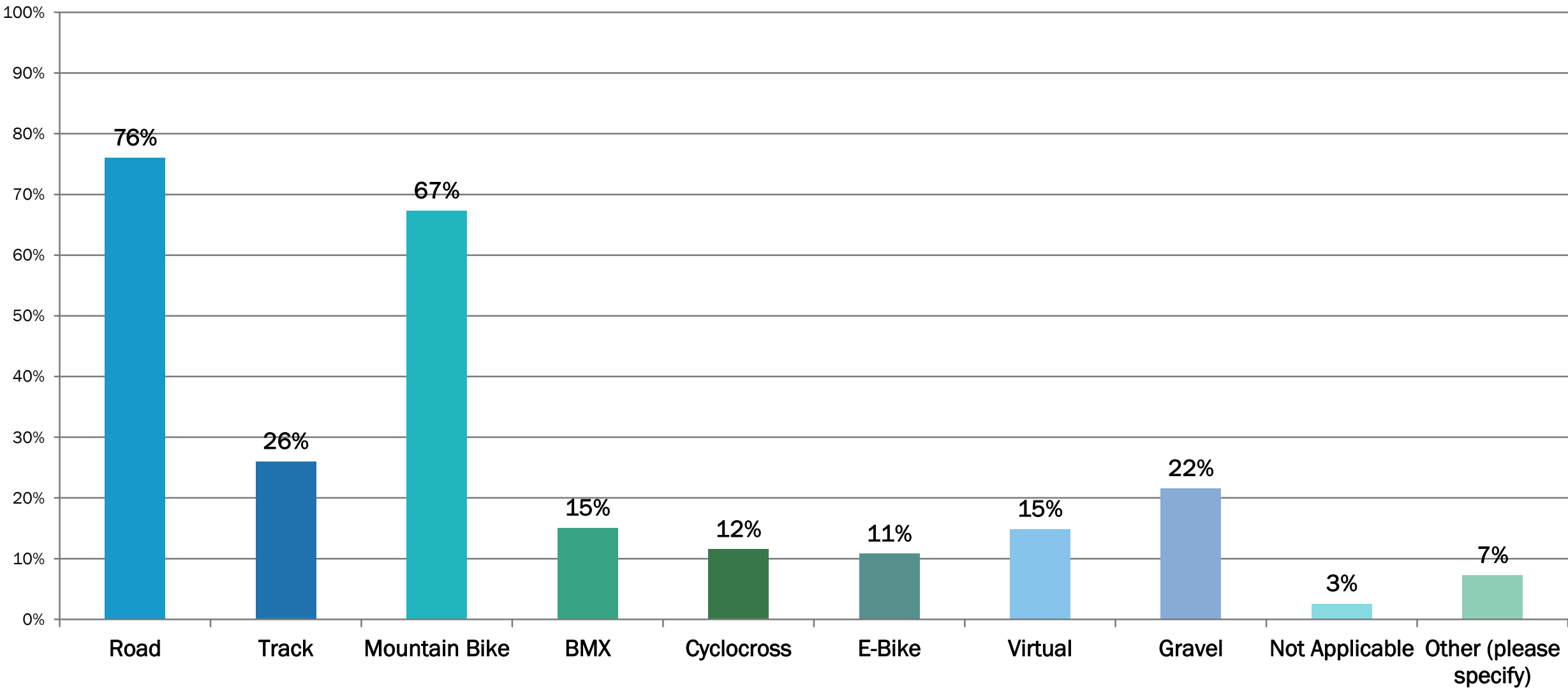


**BMX IS UNDER-REPRESENTED (15% RESPONSE VS 38% OF MEMBERS).
MTB (14% VS 5%) AND CYCLOCROSS (3% VS 0.1%) ARE OVER-REPRESENTED**

RESPONDENTS REFLECT A WIDE RANGE OF INVOLVEMENT ACROSS CYCLING. NEARLY THREE QUARTERS (72%) COUNT THEMSELVES RECREATIONAL CYCLISTS. OVER A THIRD CLUB VOLUNTEERS (38%) WHICH REFLECTS ENGAGEMENT.



RESPONDENTS RIDE A BROAD MIX OF BIKES – PREDOMINANTLY ROAD (76%) AND MTB (67%)




AWARENESS AND RELEVANCE OF CNZ

WHAT DID THE RESPONDENTS SAY?

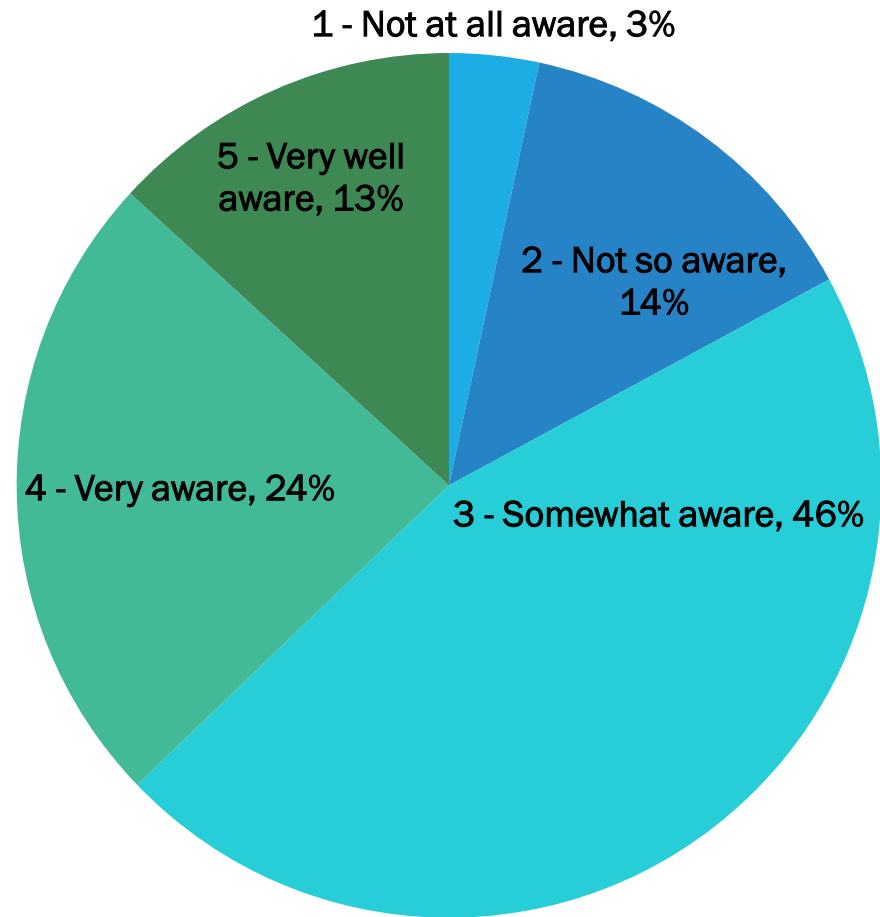


STRATEGIC REALITY

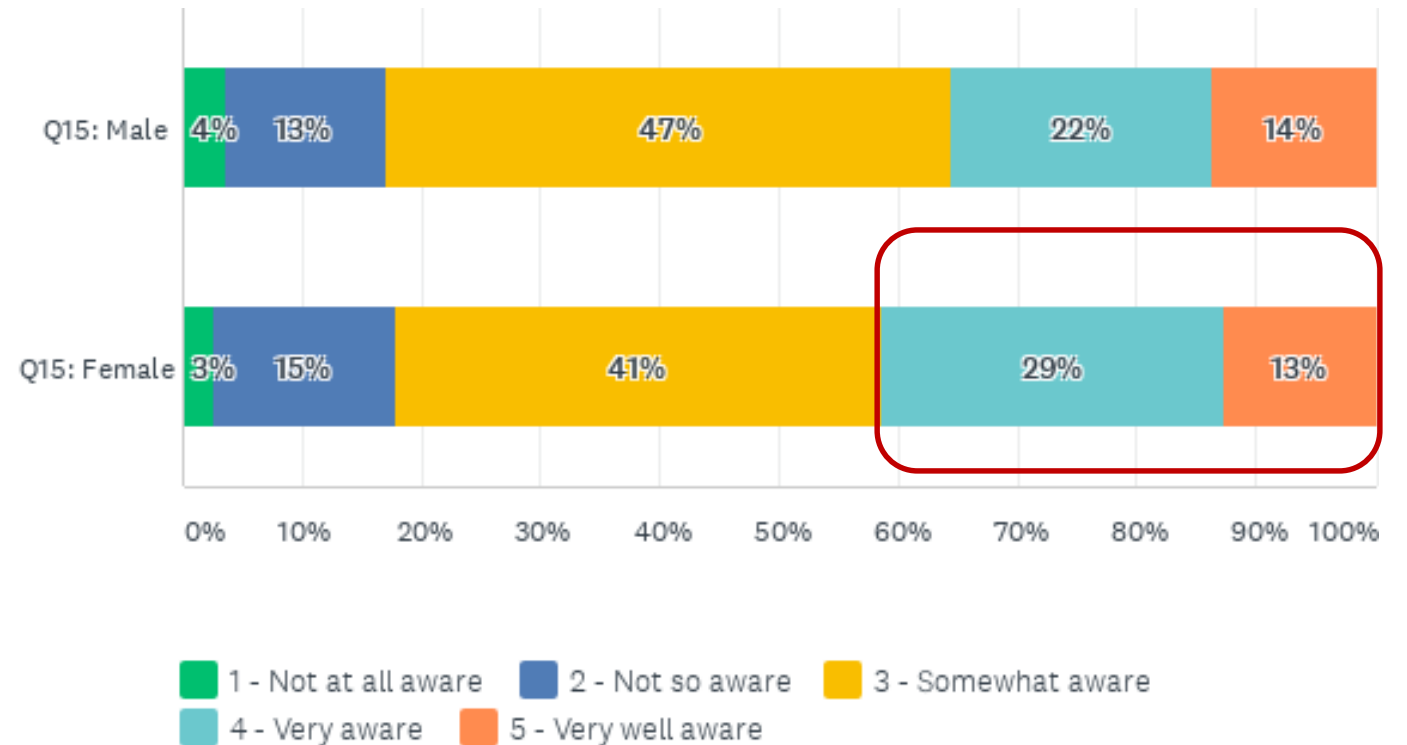


WHAT WE HEARD ABOUT AWARENESS OF CNZ

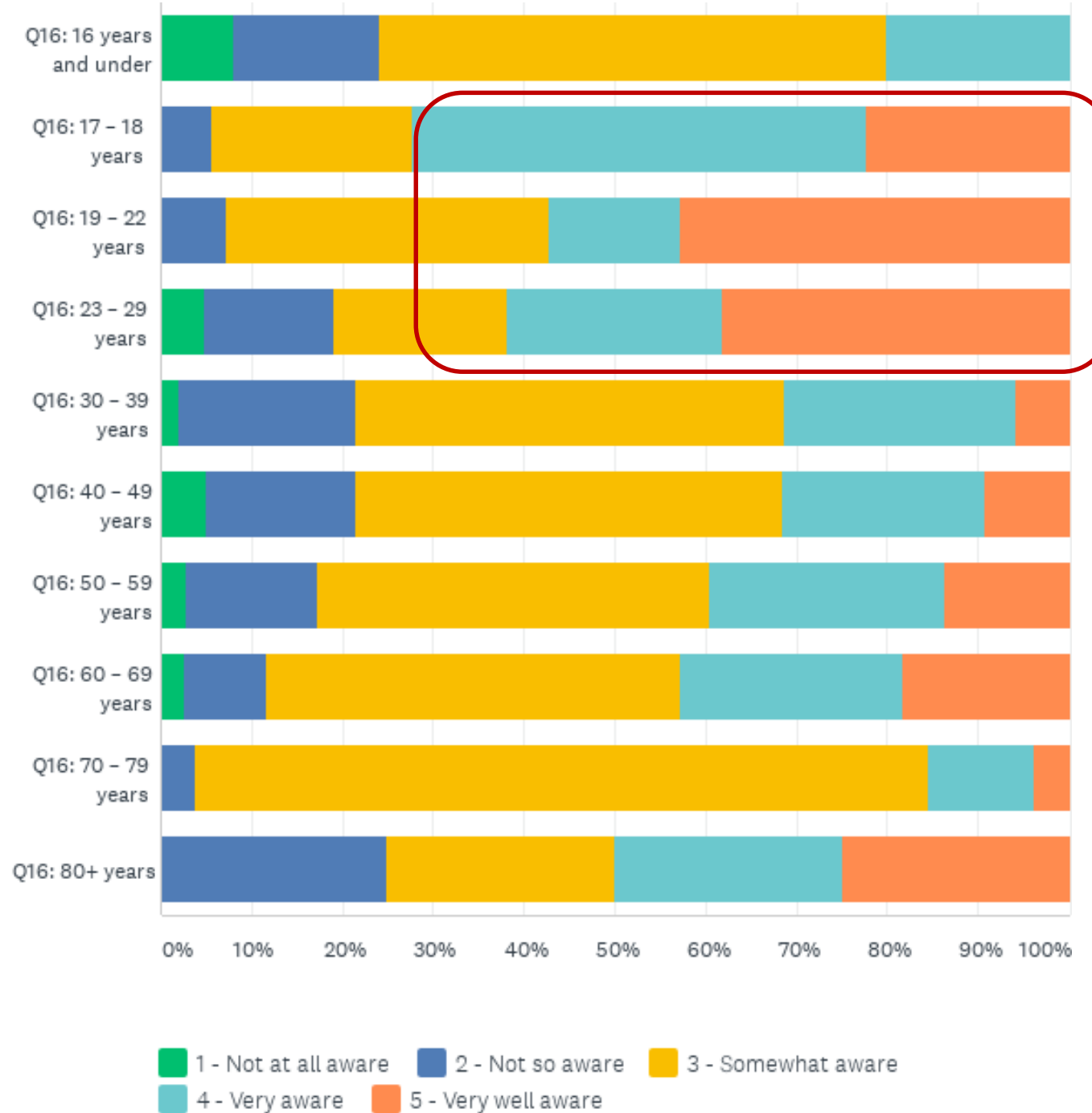
**OVERALL, THE MAJORITY (83%) OF RESPONDENTS ARE AT LEAST SOMEWHAT AWARE OF THE WORK OF CNZ.
WITH JUST OVER A THIRD (37%) STRONGLY AWARE.**



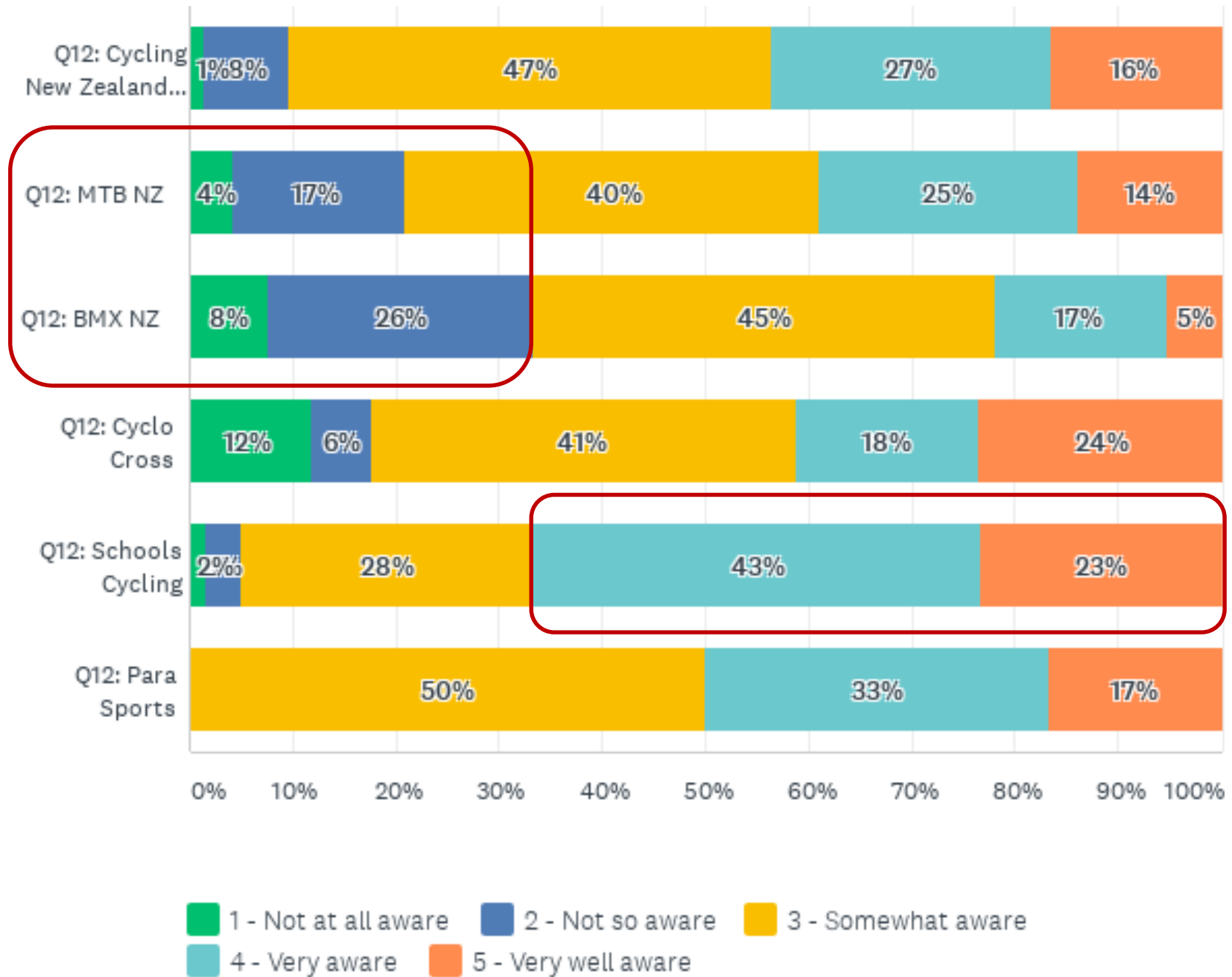
**BY GENDER -
THERE'S
SLIGHTLY
GREATER
AWARENESS OF
CNZ'S WORK
AMONG FEMALES
(42%) THAN
MALES (36%)**



**BY AGE GROUP -
THOSE MOST
AWARE OF CNZ'S
WORK ARE 17 TO
29 YEAR OLDS
AND THE OVER
80'S**

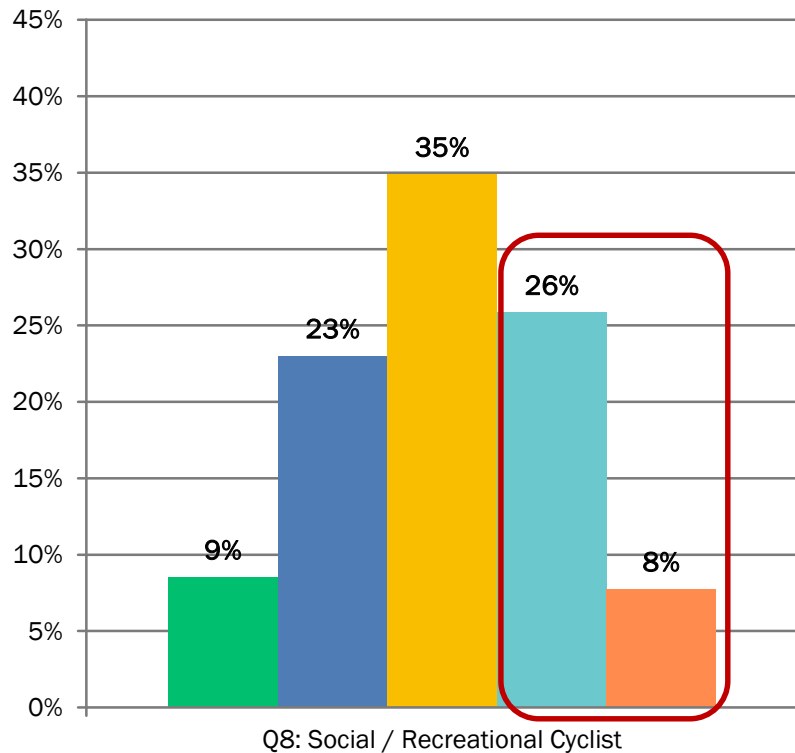


**BY AFFILIATION -
SCHOOLS (66%)
ARE HIGHLY
AWARE OF CNZ'S
WORK.
BMX (34%) AND
MTB (21%)
AFFILIATES HAVE
LOW LEVELS OF
AWARENESS**

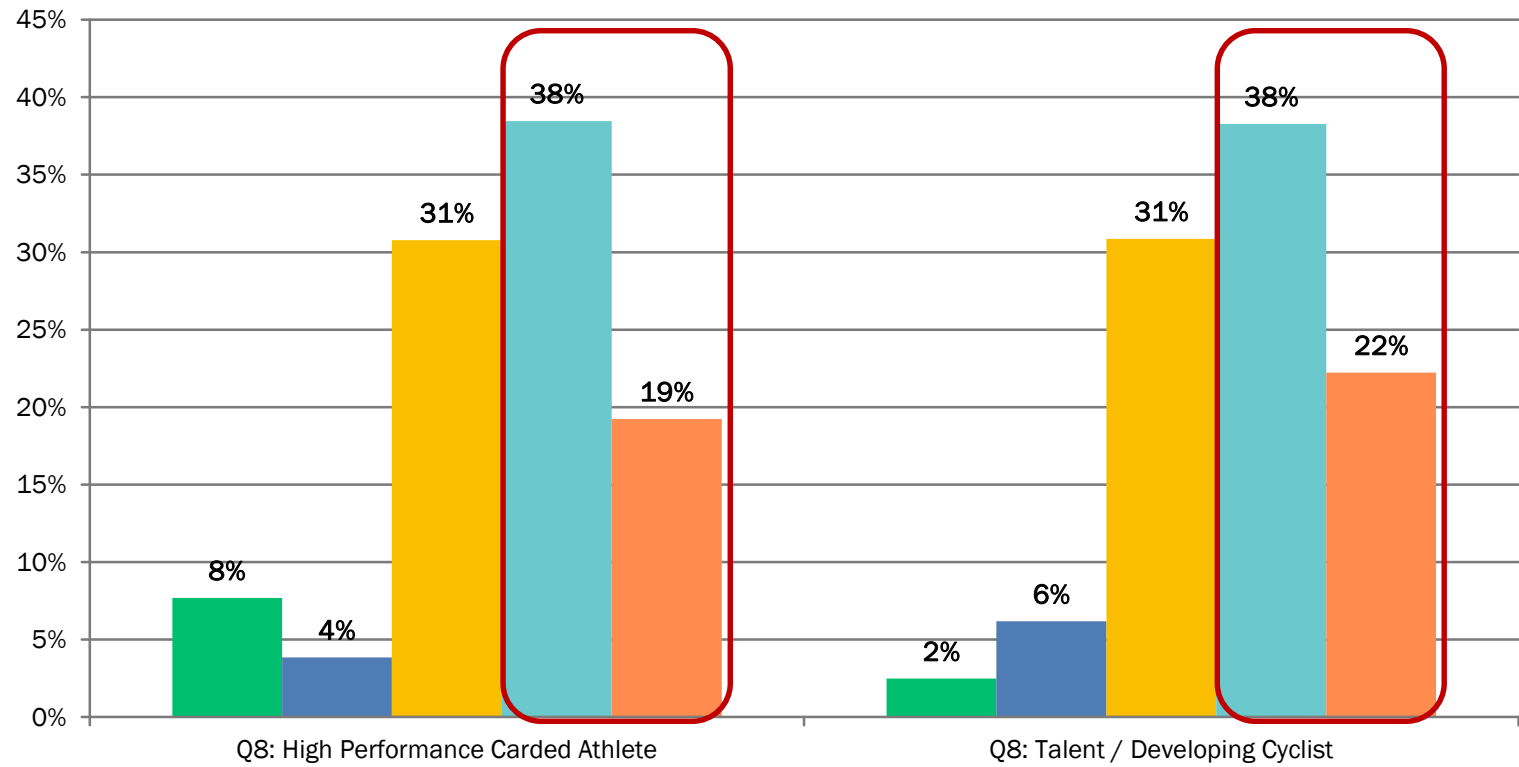


DEVELOPMENT TALENT (60%) AND HP CARDED ATHLETES (57%) ARE THE MOST AWARE OF CNZ'S ROLE, WITH RECREATIONAL CYCLISTS LESS SO (34%)

Recreational cyclists



HP Carded and Talented cyclists

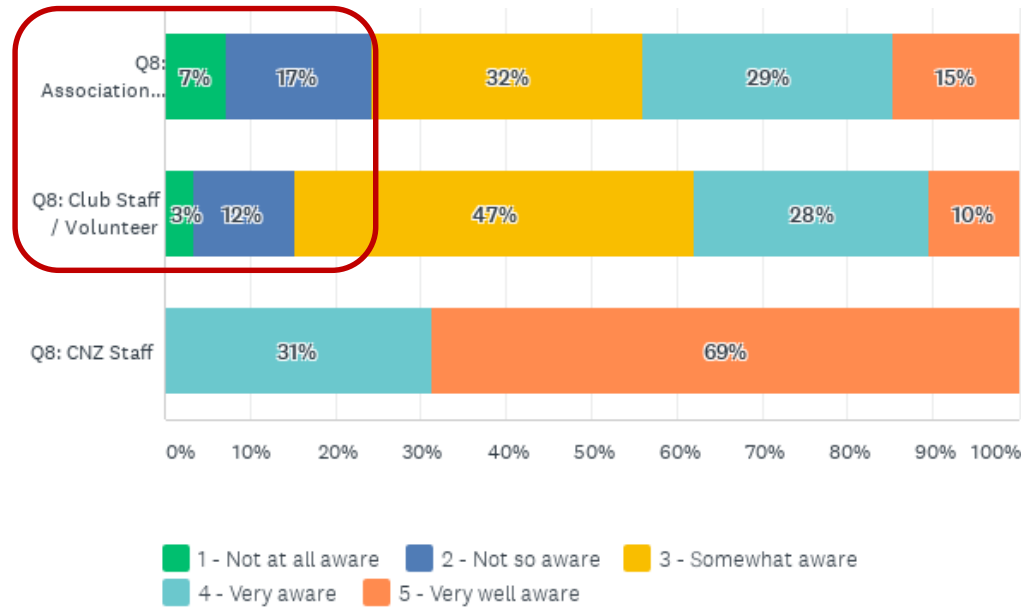


1 - Not at all relevant 2 - Slightly relevant
 3 - Somewhat relevant 4 - Very relevant
 5 - Extremely relevant

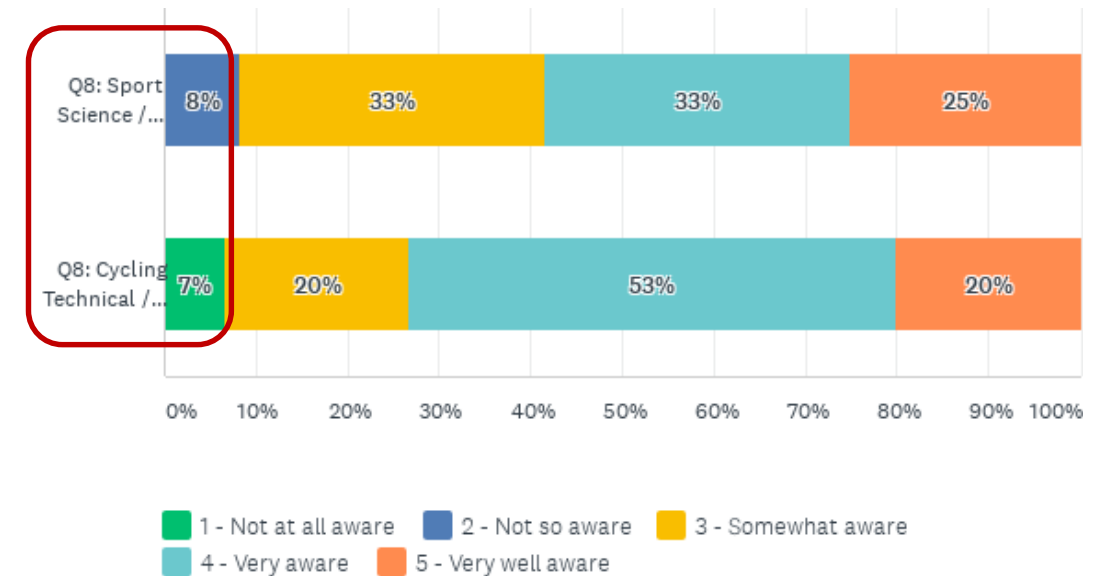
1 - Not at all aware 2 - Not so aware 3 - Somewhat aware 4 - Very aware 5 - Very well aware

THERE'S SOME LACK OF AWARENESS OF CNZ'S WORK BY STAFF IN ASSOCIATIONS (24%) AND CLUBS (15%) & HP SUPPORT ROLES (7-8%)

Staff/vols

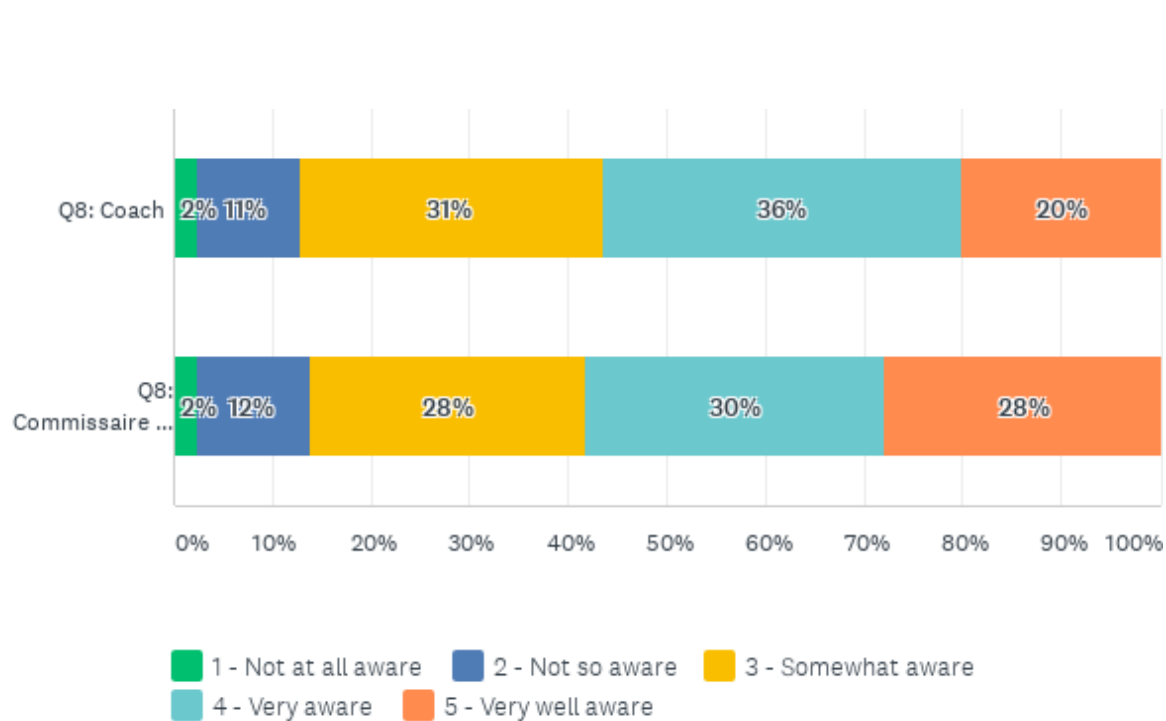


Hp staff

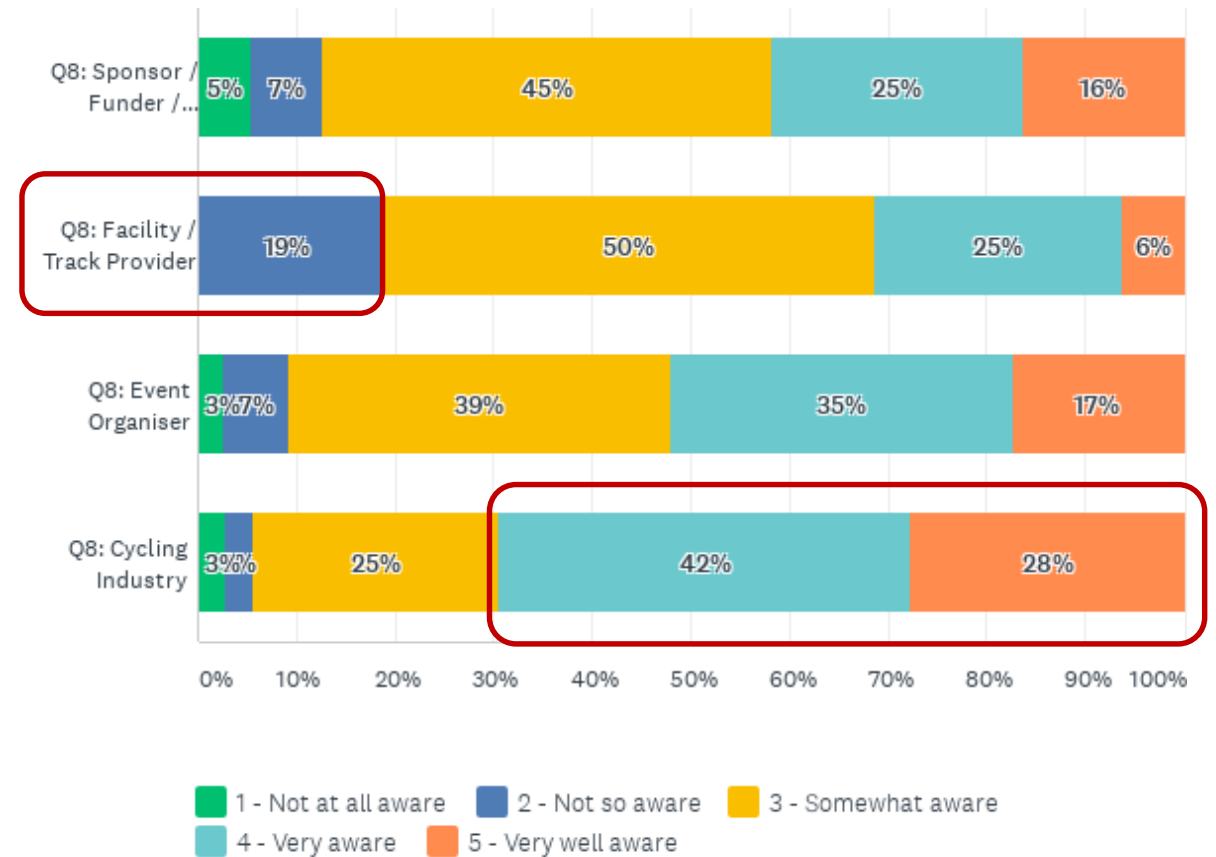


ONE FIFTH (19%) OF FACILITY PROVIDERS ARE NOT SO AWARE OF CNZ'S WORK. HIGH AWARENESS (70%) ACROSS THE CYCLING INDUSTRY

Coaches/officials

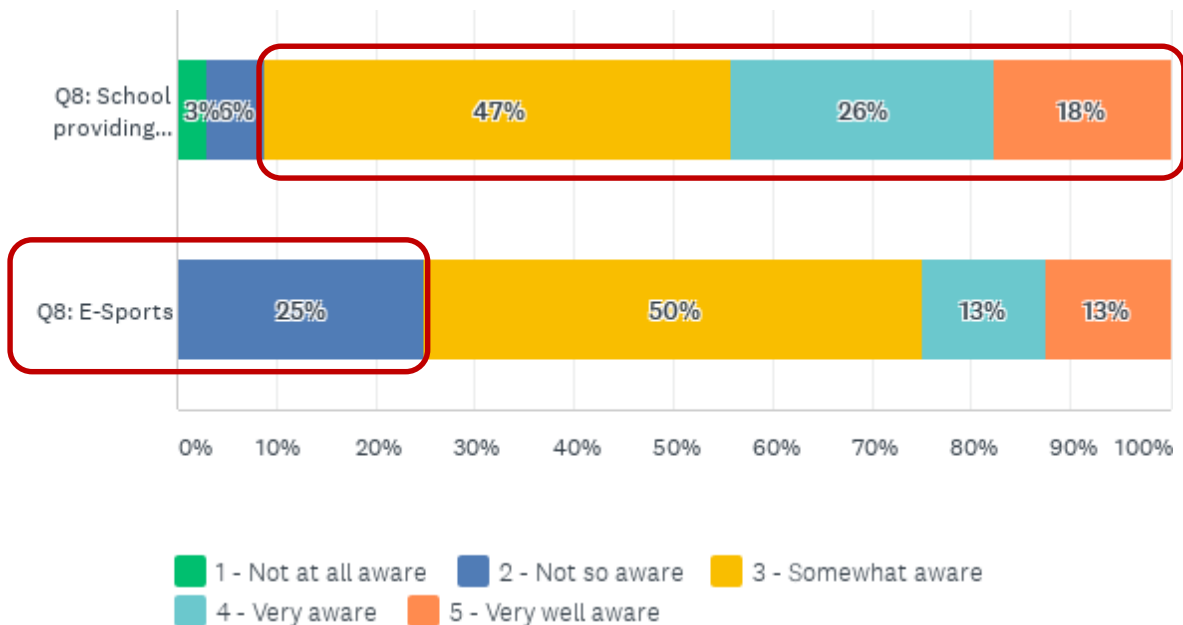


Industry partners

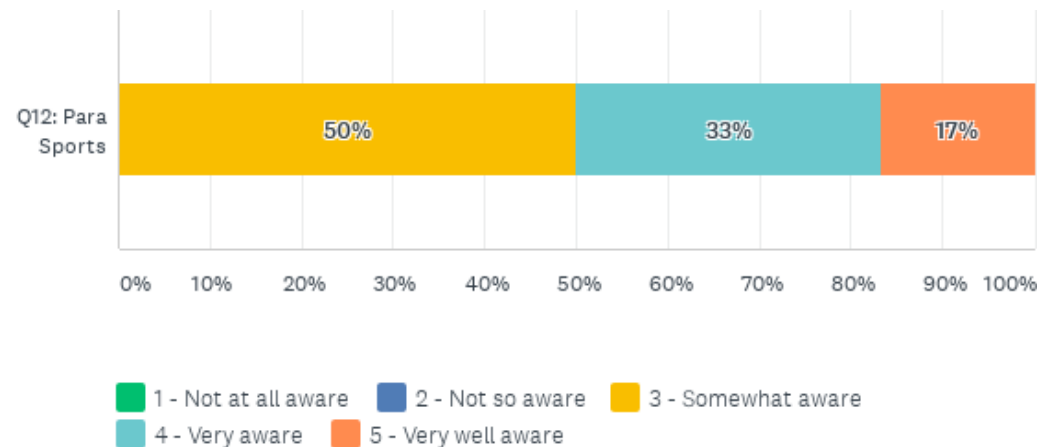


MOST SCHOOLS ARE AT LEAST SOMEWHAT AWARE (91%) OF CNZ'S WORK. WHILE A QUARTER (35%) OF E-SPORTS RESPONDENTS ARE NOT SO AWARE.

Schools n=41

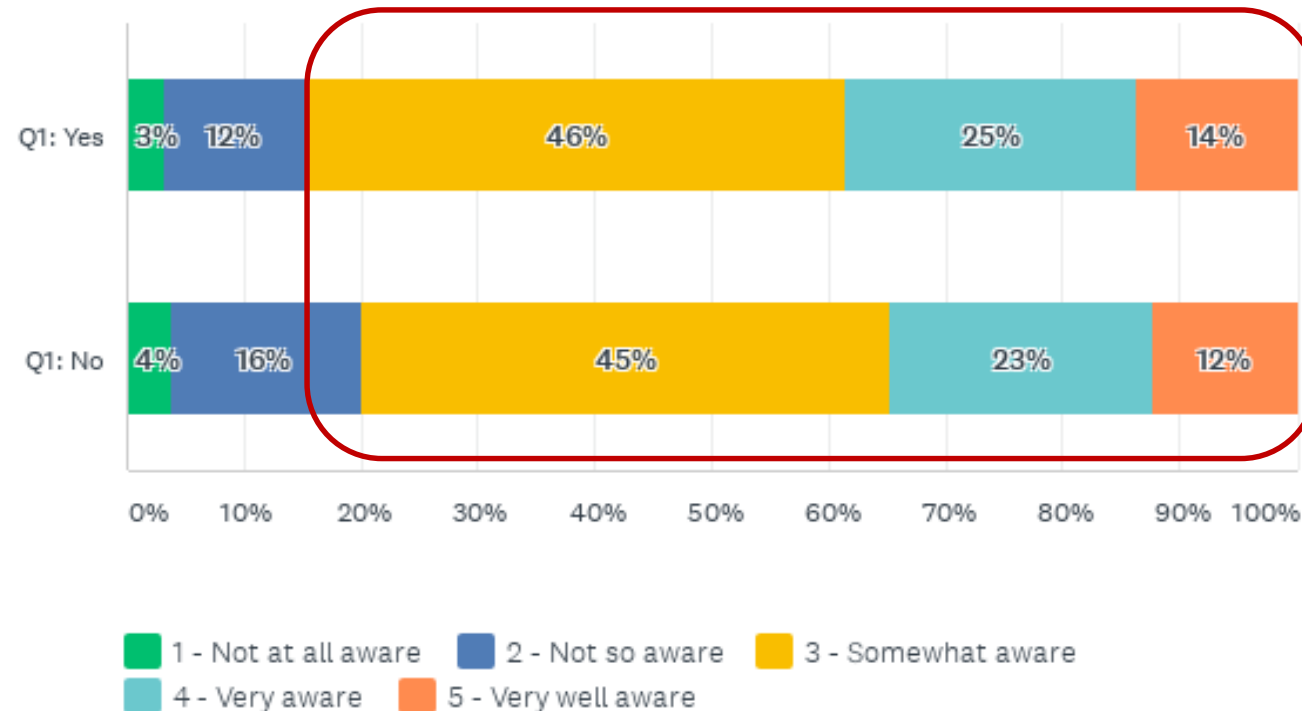


Para sports n=6



THERE ARE SIMILAR LEVELS OF AWARENESS OF CNZ'S WORK BETWEEN LICENCE HOLDERS (85%) AND THOSE WITHOUT A CNZ LICENCE (80%)

Q2 Please indicate your level of awareness of the work of Cycling New Zealand?

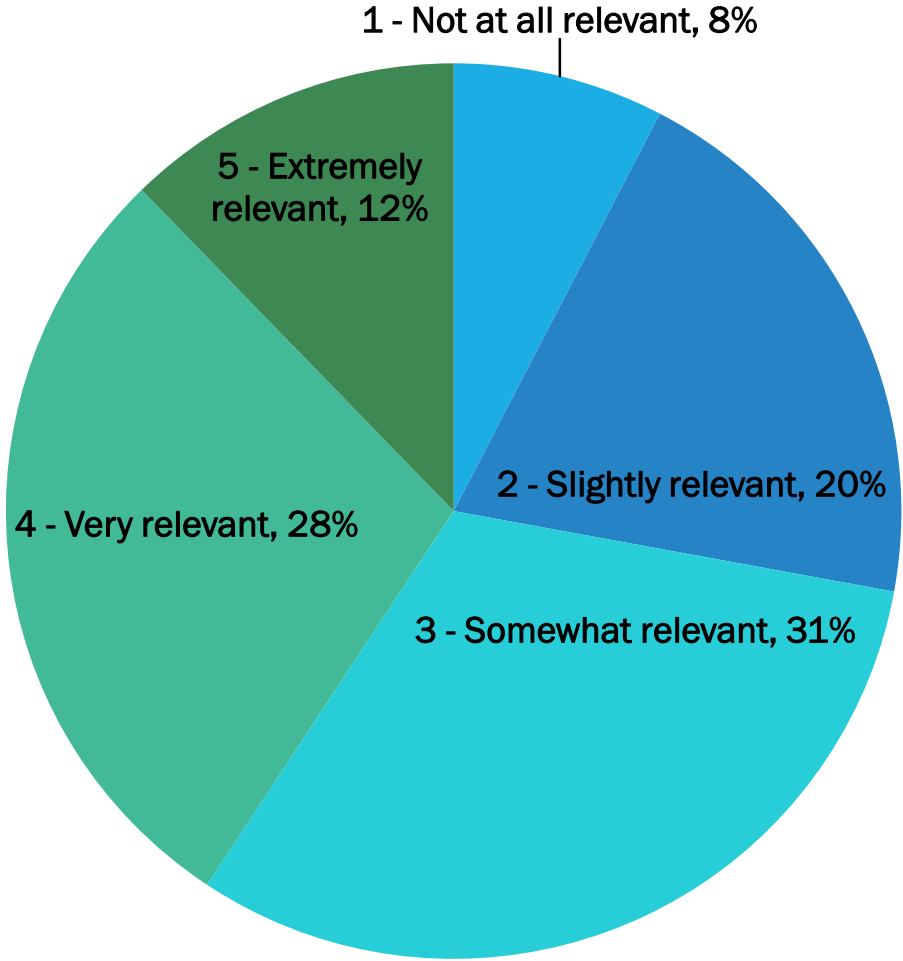




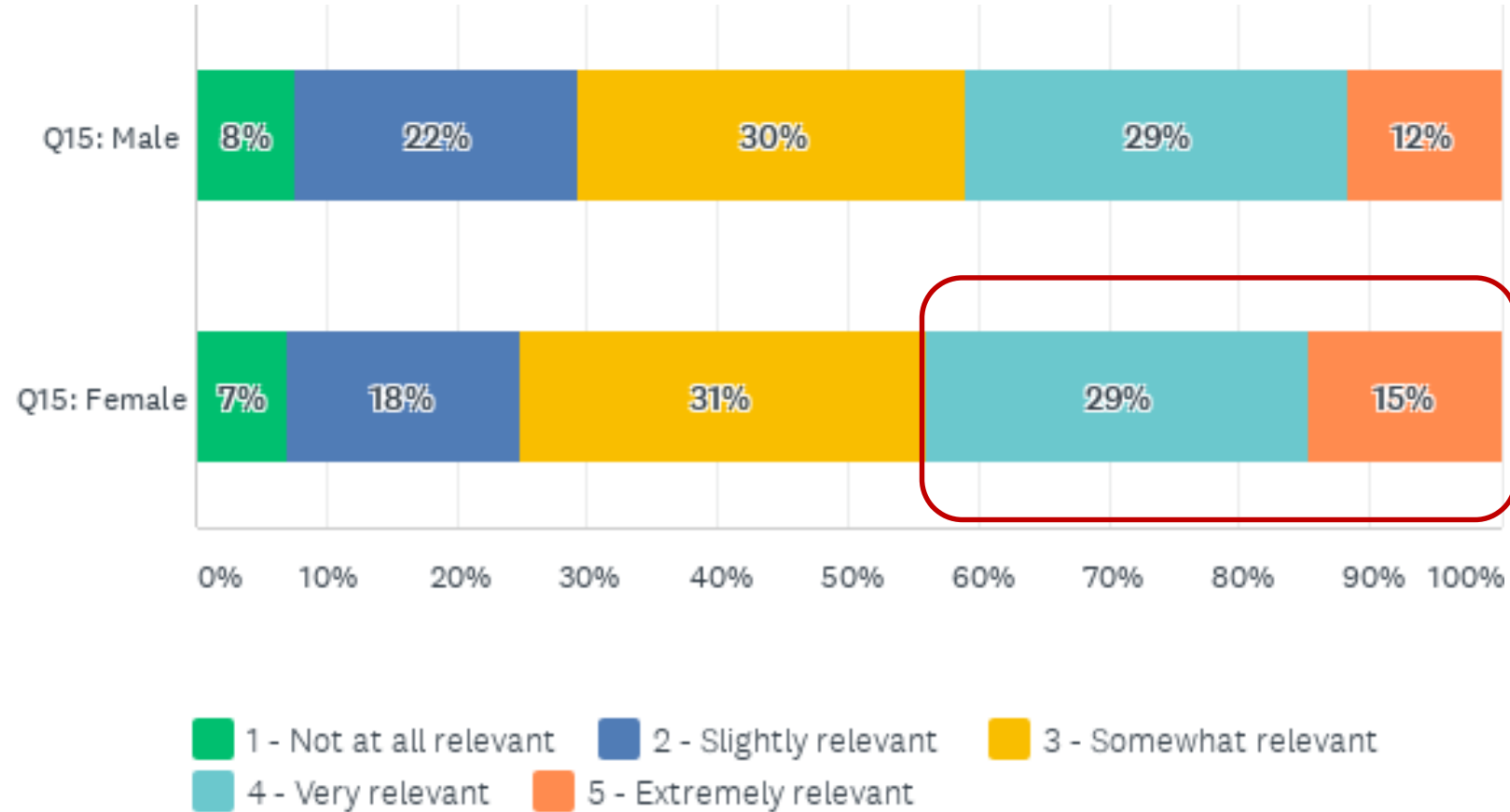
**WHAT WE HEARD
ABOUT RELEVANCE
OF CNZ**



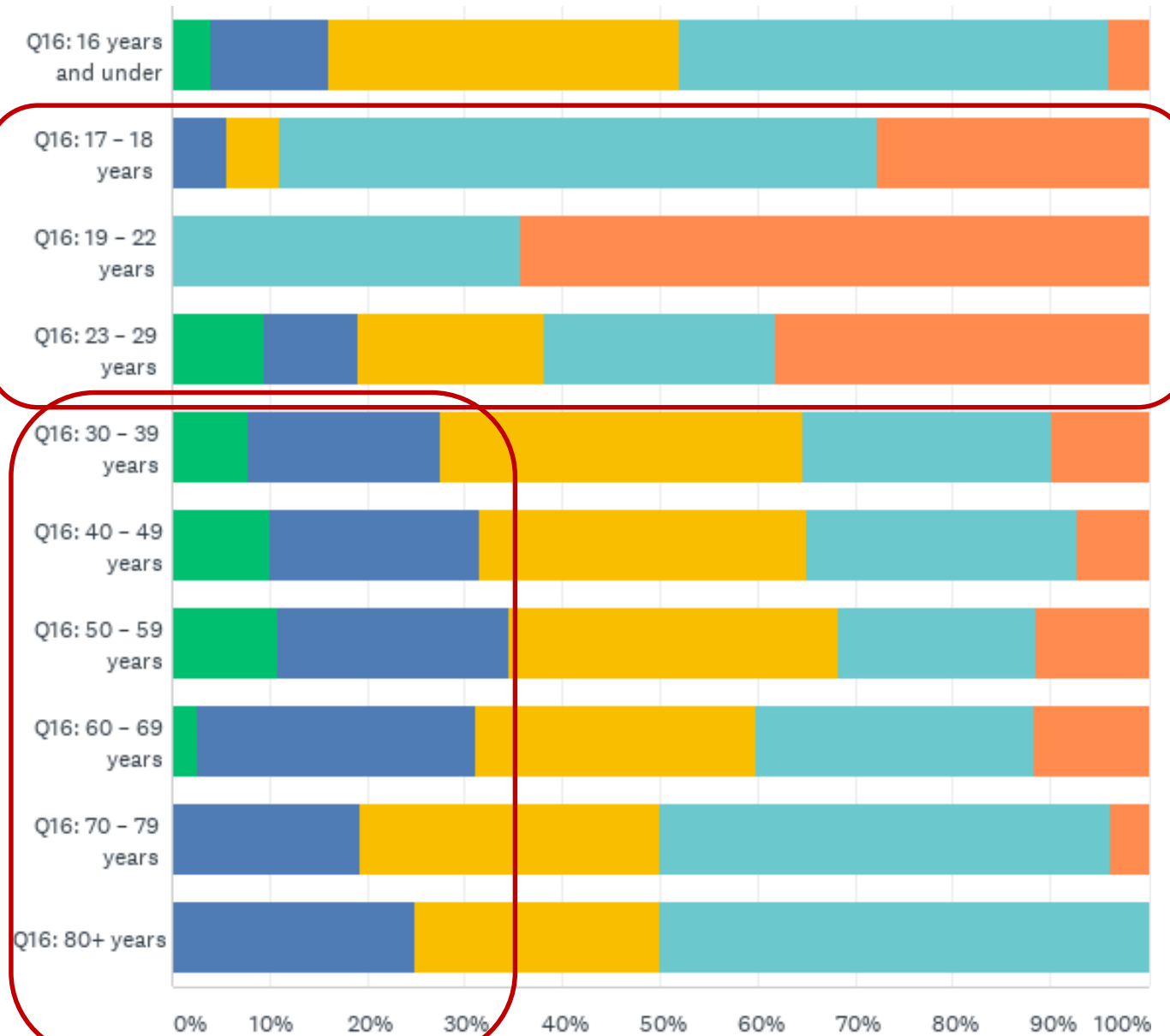
OVERALL, NEARLY THREE QUARTERS (71%) SEE CNZ AS AT LEAST SOMEWHAT RELEVANT TO THEM, WITH 40% SEEING STRONG RELEVANCE



**BY GENDER –
FEMALE
RESPONDENTS
(44%) SEE THE
RELEVANCE OF
CNZ SLIGHTLY
THAN MALES
41%)**

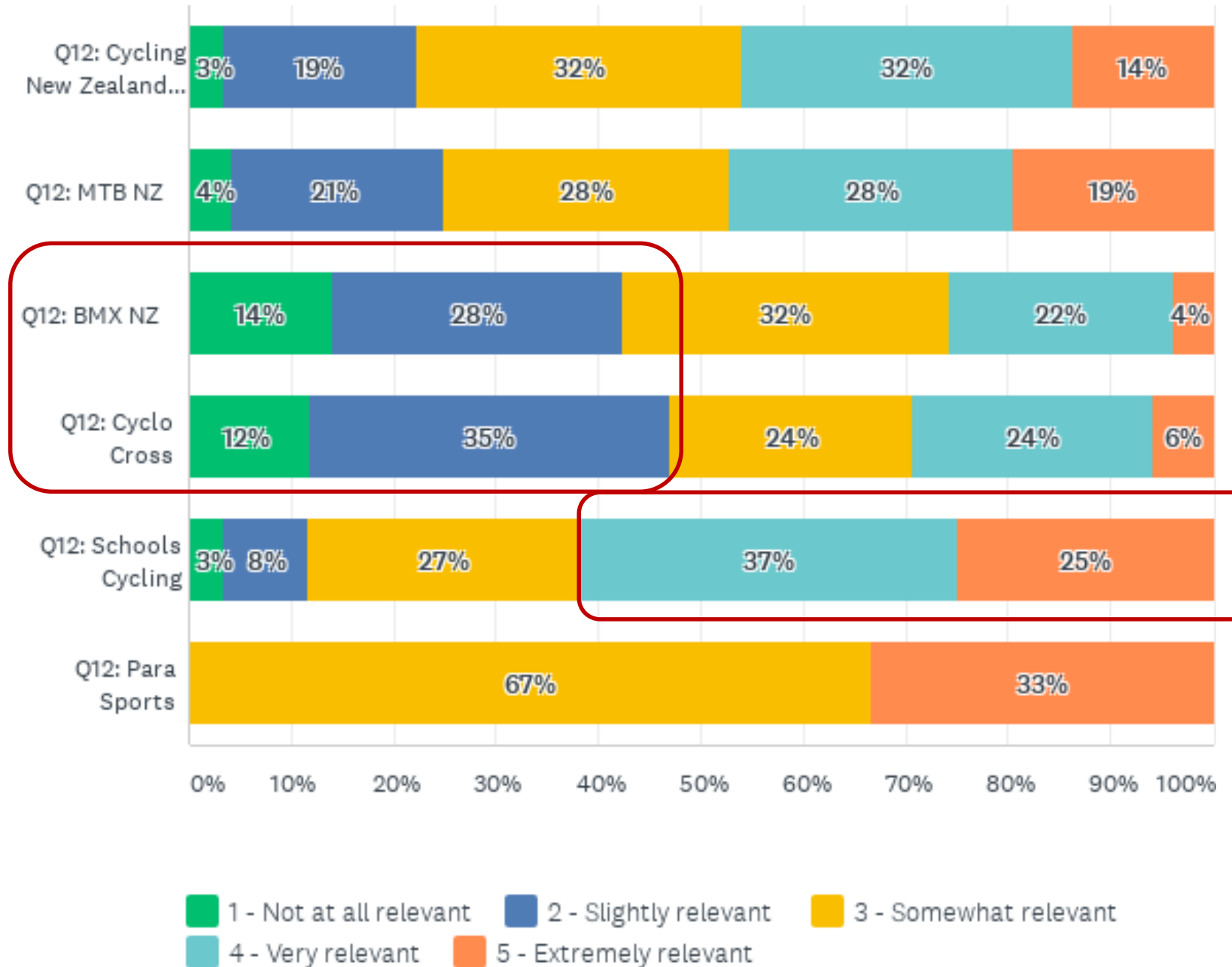


**BY AGE – CNZ IS
EXTREMELY
RELEVANT TO 17-
22 YEAR OLDS,
BUT DROPS IN
RELEVANCE FOR
30-70 YEAR OLDS**



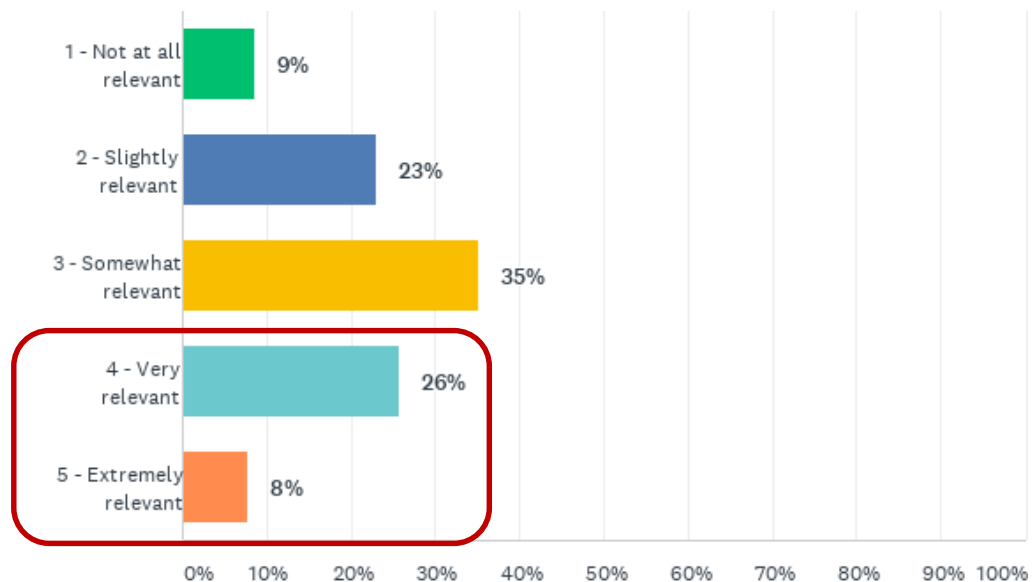
1 - Not at all relevant 2 - Slightly relevant 3 - Somewhat relevant
4 - Very relevant 5 - Extremely relevant

**BY AFFILIATION –
SCHOOLS (62%)
SEE HIGHEST
LEVELS OF
RELEVANCE FOR
CNZ
CYCLOCROSS
(47%) AND BMX
(42%) SEE LITTLE
RELEVANCE**

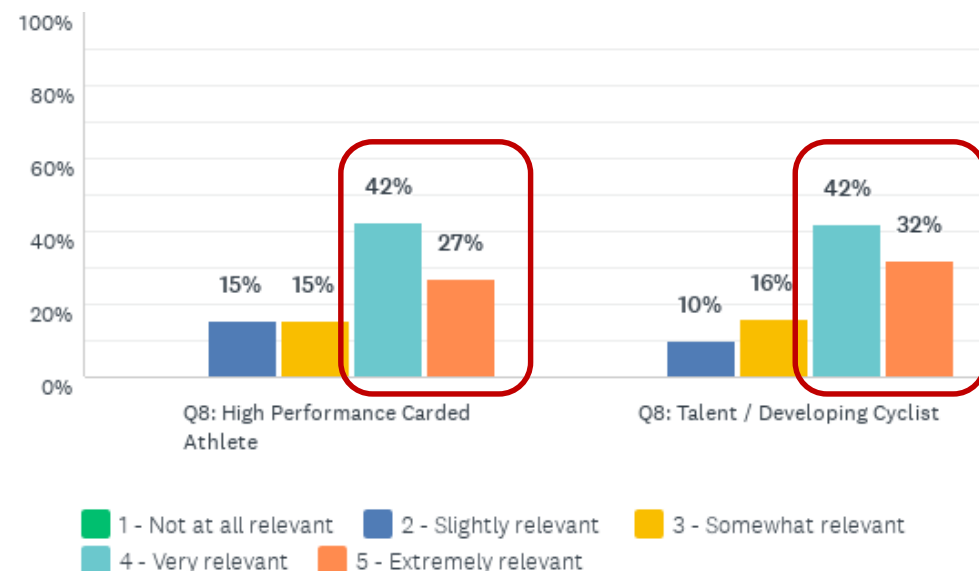


THREE QUARTERS OF HP (71%) & TALENTED (74%) CYCLISTS SEE CNZ AS HIGHLY RELEVANT, AND A THIRD (34%) OF RECREATIONAL CYCLISTS DO TOO

Recreational cyclists n=388

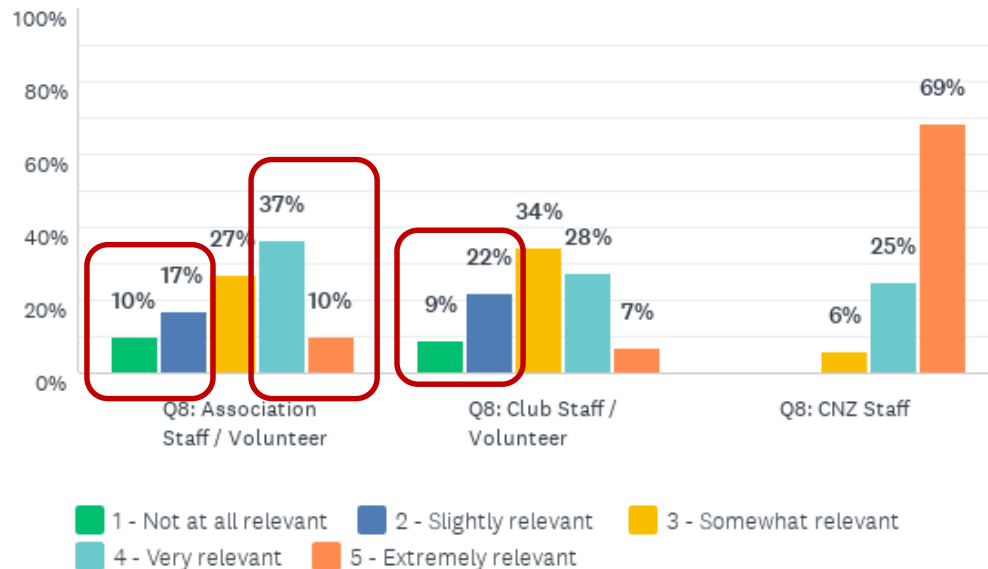


HP cyclists carded n=26, talent n=81

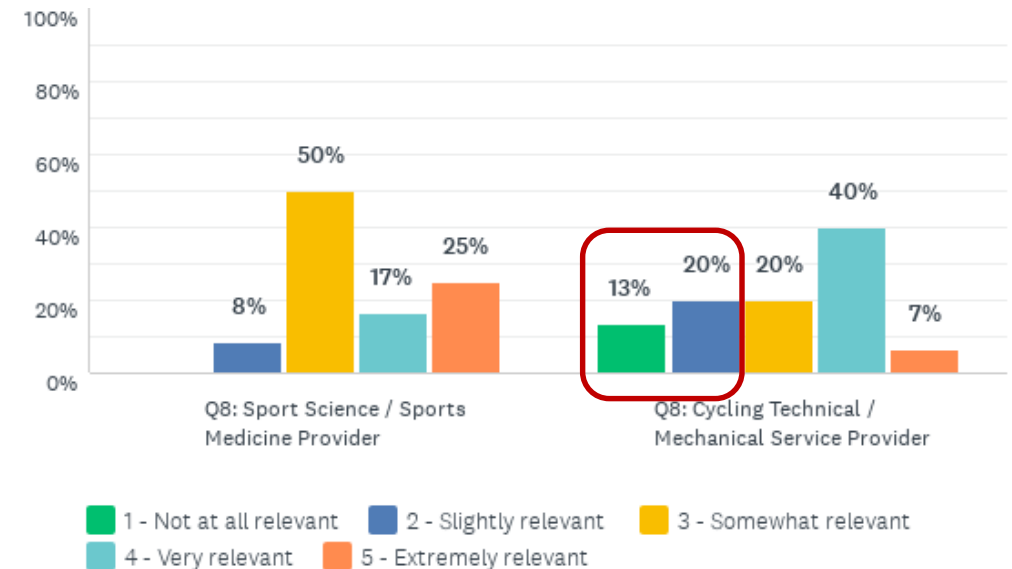


NEARLY HALF OF ASSOCIATION STAFF (47%) SEE CNZ IS VERY OR HIGHLY RELEVANT - ALTHOUGH A QUARTER (27%) DO NOT. NOR DO ~ ONE THIRD OF HP TECH STAFF (33%) AND CLUB STAFF (31%)

Organisational Staff/vols

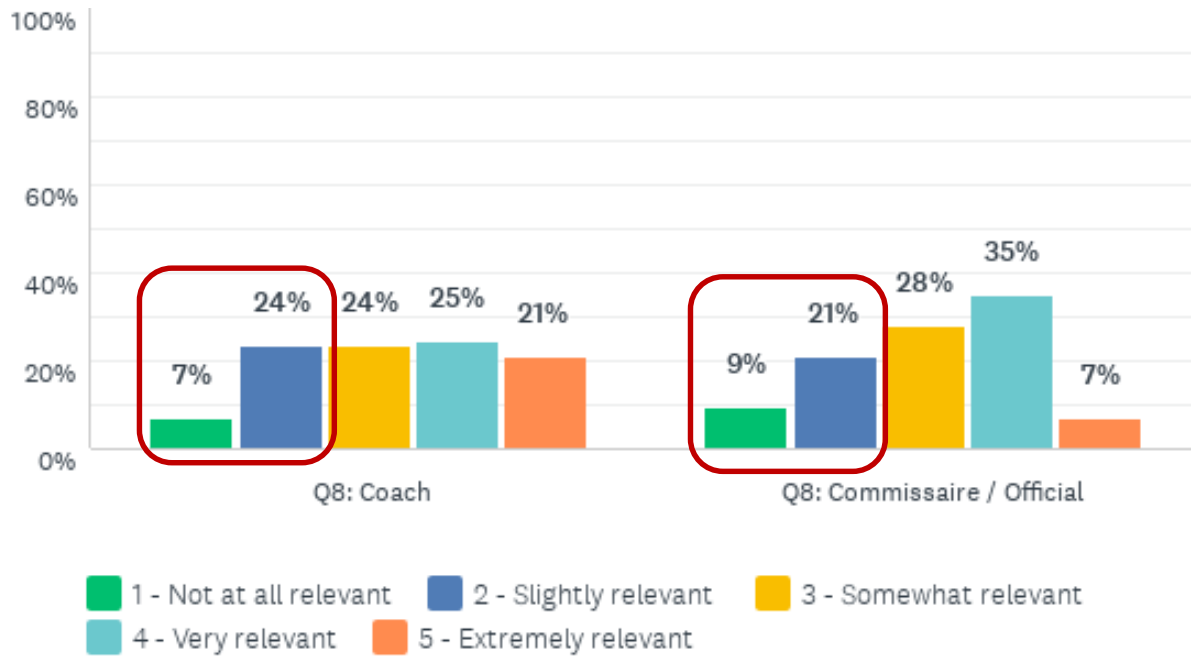


HP/Tech staff

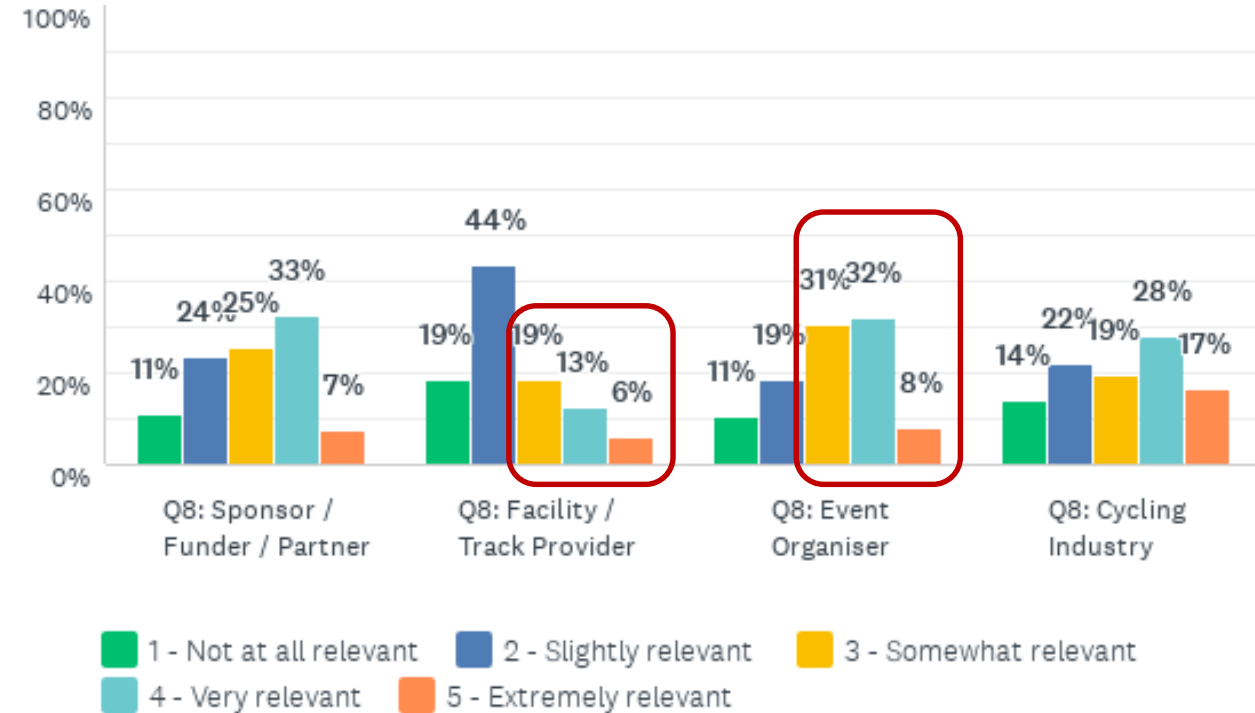


NEARLY ONE THIRD OF ALL COACHES (31%), COMMISSAIRES AND OFFICIALS (30%) INDICATE CNZ IS EITHER SLIGHTLY OR NOT AT ALL RELEVANT TO THEM.

Coaches/officials



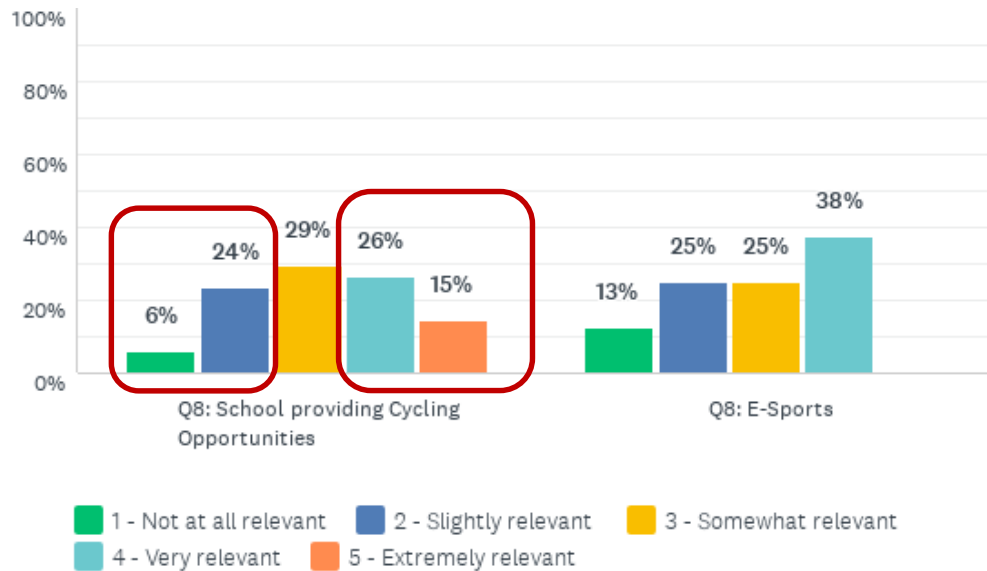
Industry partners



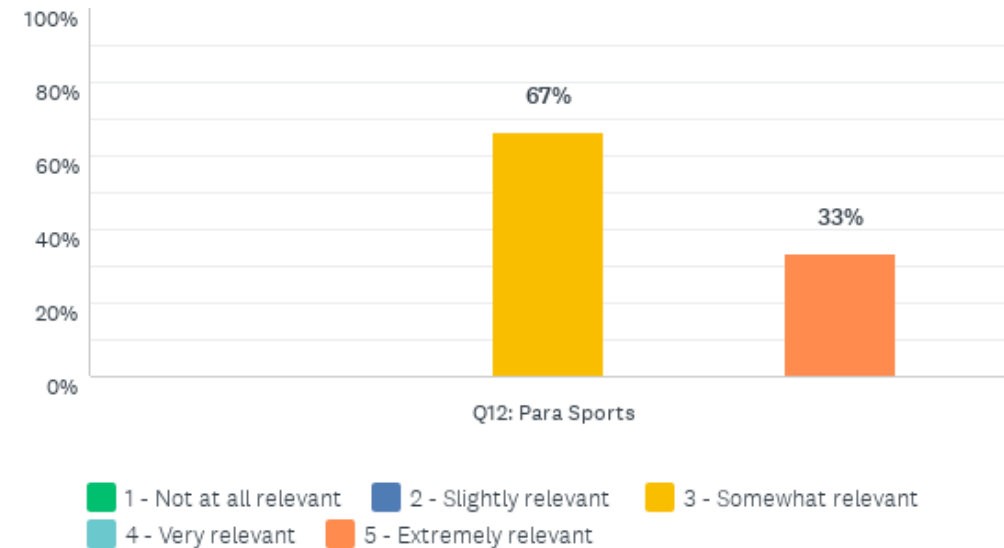
NEARLY THREE QUARTERS (71%) OF EVENT ORGANISERS SEE AT LEAST SOME RELEVANCE IN CNZ, COMPARED TO ONLY A THIRD (38%) OF FACILITY PROVIDERS

NEARLY A THIRD OF SCHOOLS (30%) DO NOT SEE RELEVANCE IN CNZ, BUT MORE (41%) SEE CNZ AS VERY OR EXTREMELY RELEVANT

Schools and E-Sports



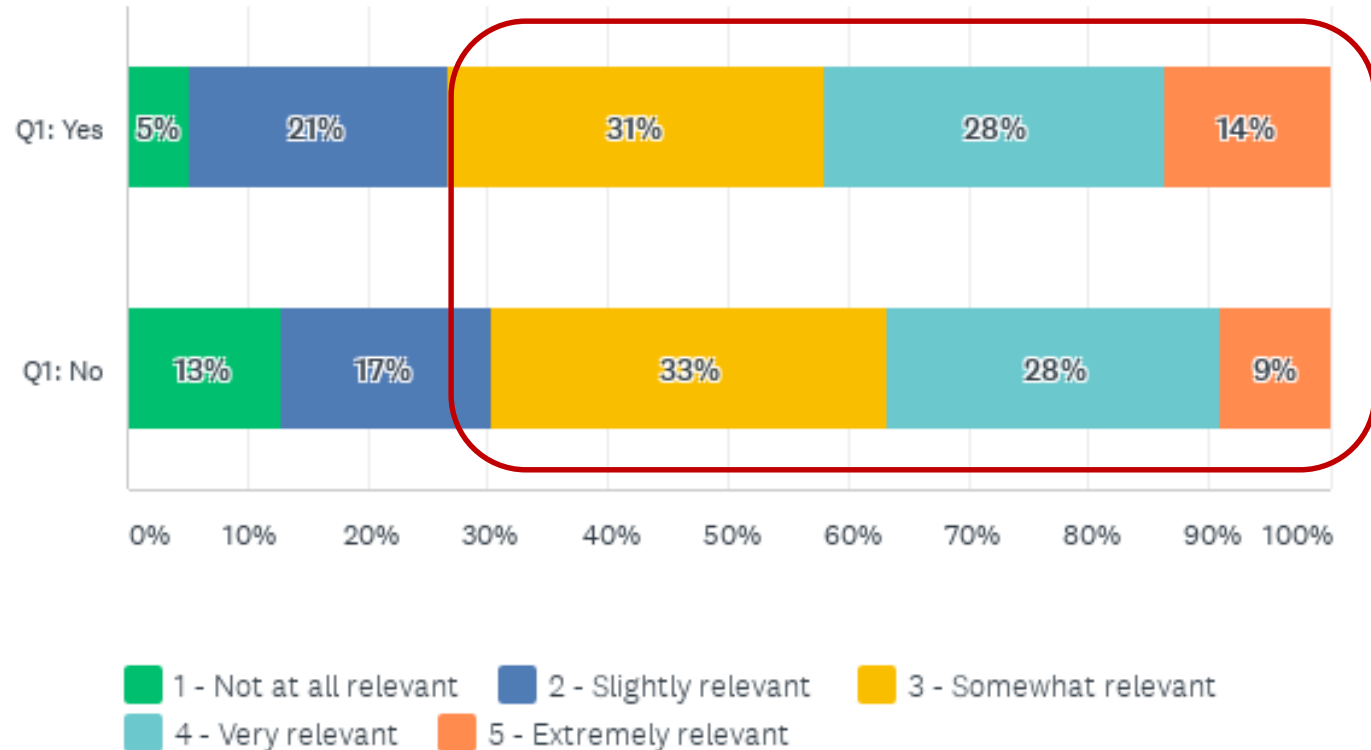
Para sport



E-SPORTS SEE LESS RELEVANCE, WHILE ALL PARA SPORT RESPONDENTS SEE AT LEAST SOME RELEVANCE

THERE ARE SIMILAR LEVELS OF RELEVANCE SEEN BETWEEN LICENCE HOLDERS (73%) AND THOSE WITHOUT A CNZ LICENCE (70%)

Q3 Please rate how relevant Cycling New Zealand is to you?



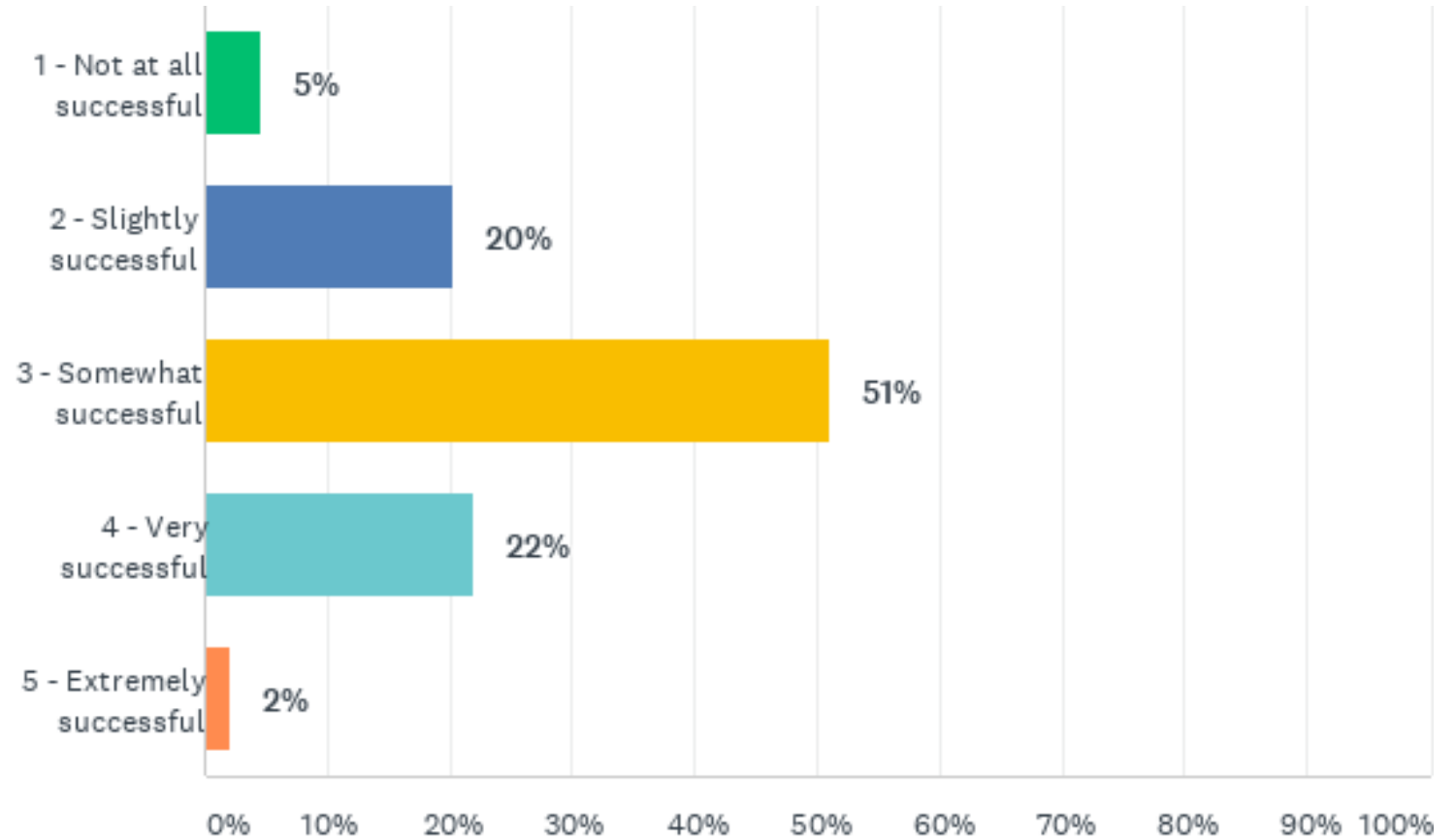
OVERALL SUCCESS OF CNZ

WHAT DID THEY SAY?



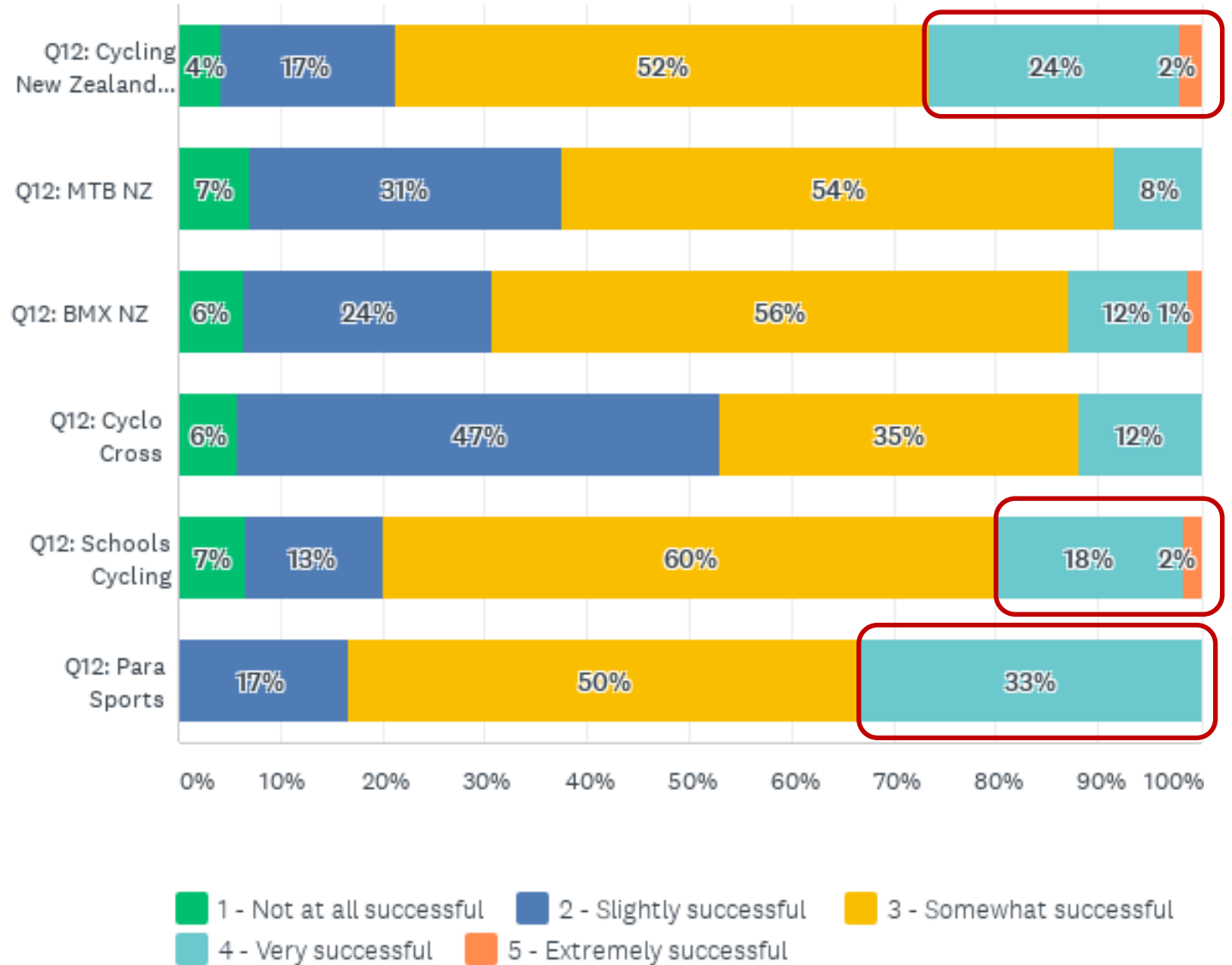
STRATEGIC REALITY

**THREE
QUARTERS OF
RESPONDENTS
INDICATED CNZ
IS AT LEAST
SOMEWHAT
SUCCESSFUL
OVERALL**



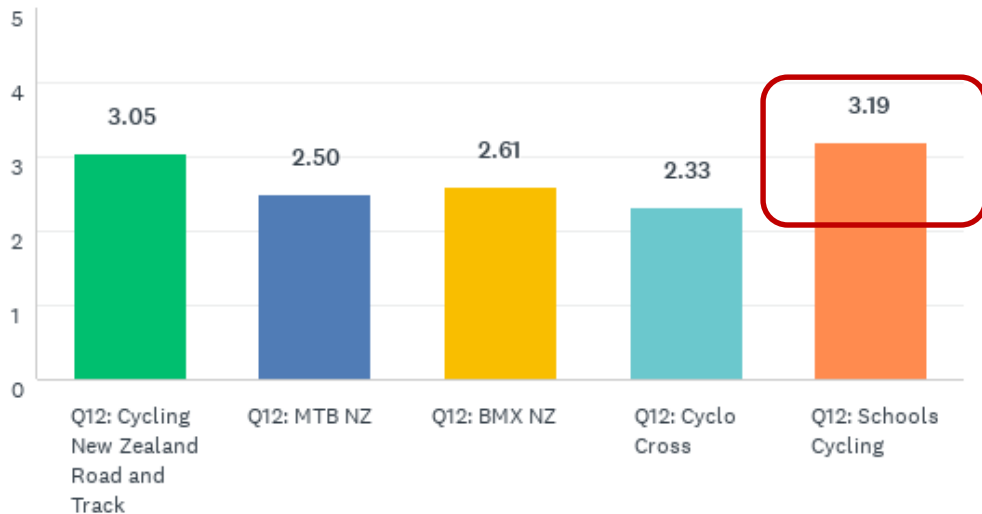
**THE AVERAGE SUCCESS RATING
ACROSS ALL RESPONDENTS IS 2.96/5**

BY AFFILIATION – ROAD AND TRACK (26%), SCHOOLS (20%) AND PARA SPORTS (33%) SEE CNZ AS HIGHLY SUCCESSFUL, WITH OTHERS LESS SO.

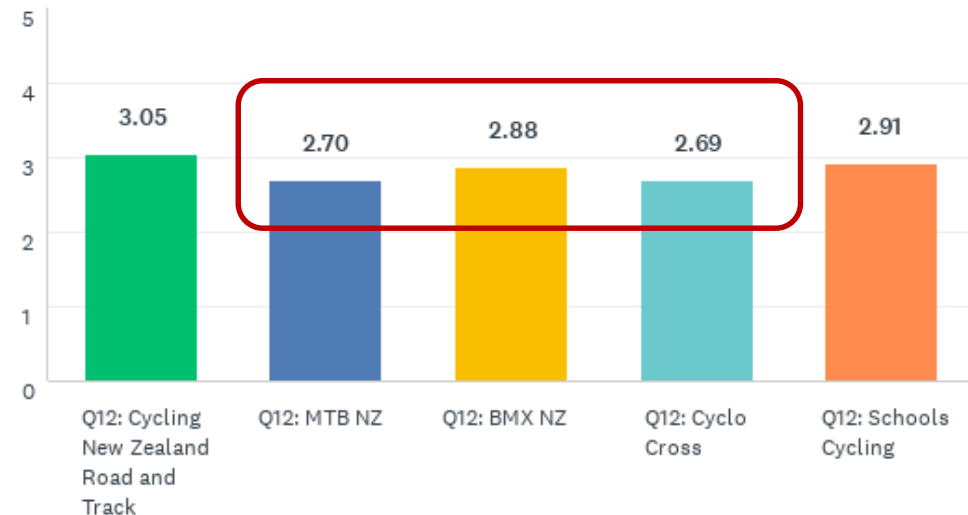


ON AVERAGE, MALES RATE CNZ AT LEAST OR MORE SUCCESSFUL ACROSS THE MEMBER ORGANISATIONS THAN FEMALES. PARTICULARLY IN CYCLOCROSS (2.69 VS 2.33), BMX (2.88 VS 2.61) AND MTB (2.7 VS 2.5)

Female

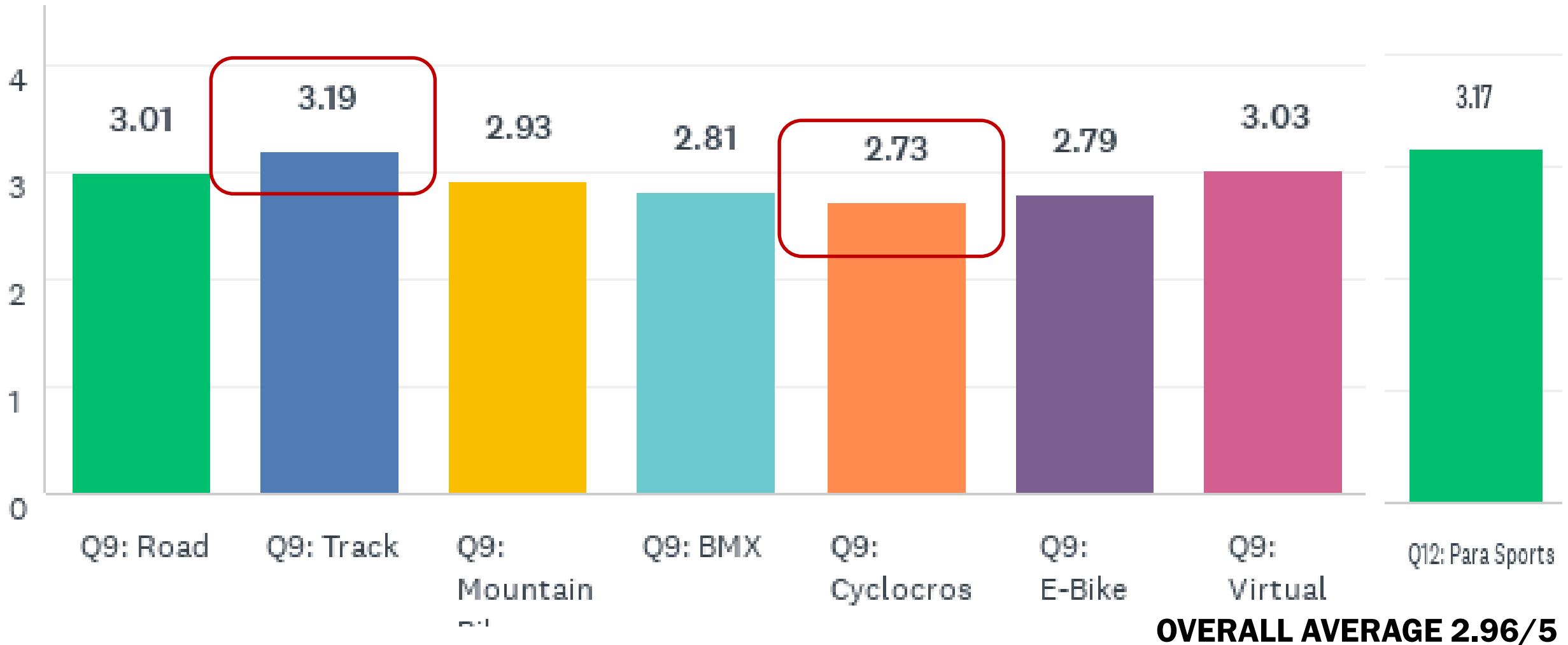


Male



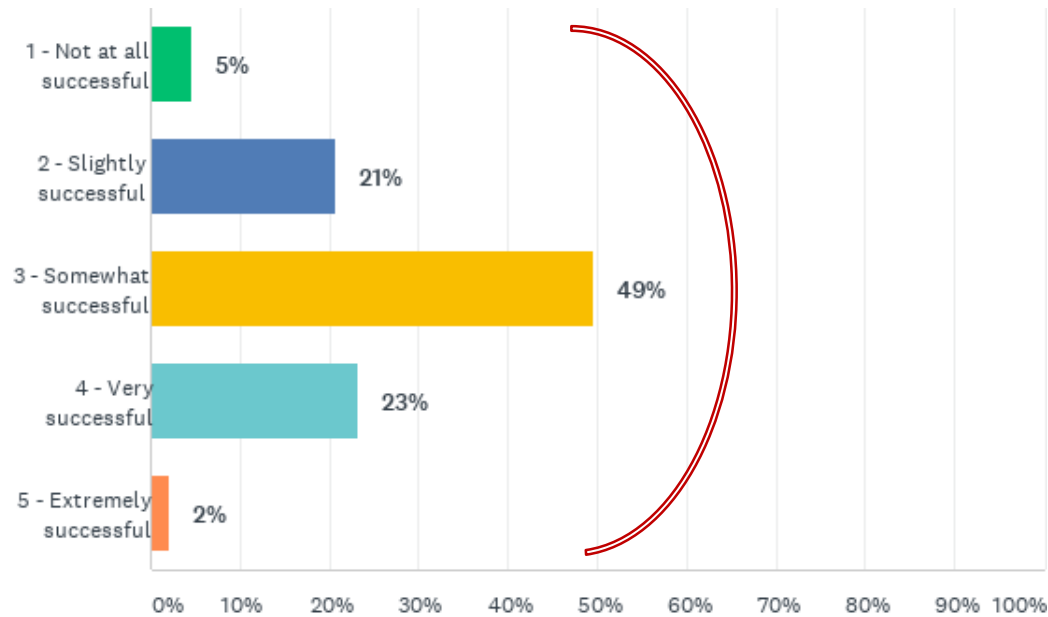
CONVERSELY, IN SCHOOL CYCLING, FEMALES (3.19/5) VIEW CNZ AS MORE SUCCESSFUL THAN MALES (2.91/5)

TRACK RIDERS HAVE THE HIGHEST AVERAGE SUCCESS RATING (3.19/5), WITH CYCLO-CROSS RIDERS (2.73/5) RATING LOWEST

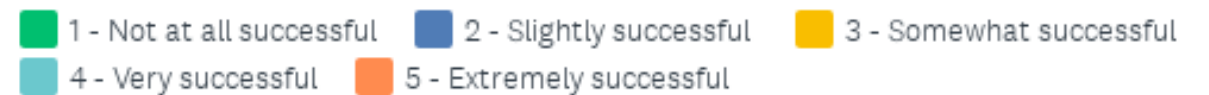
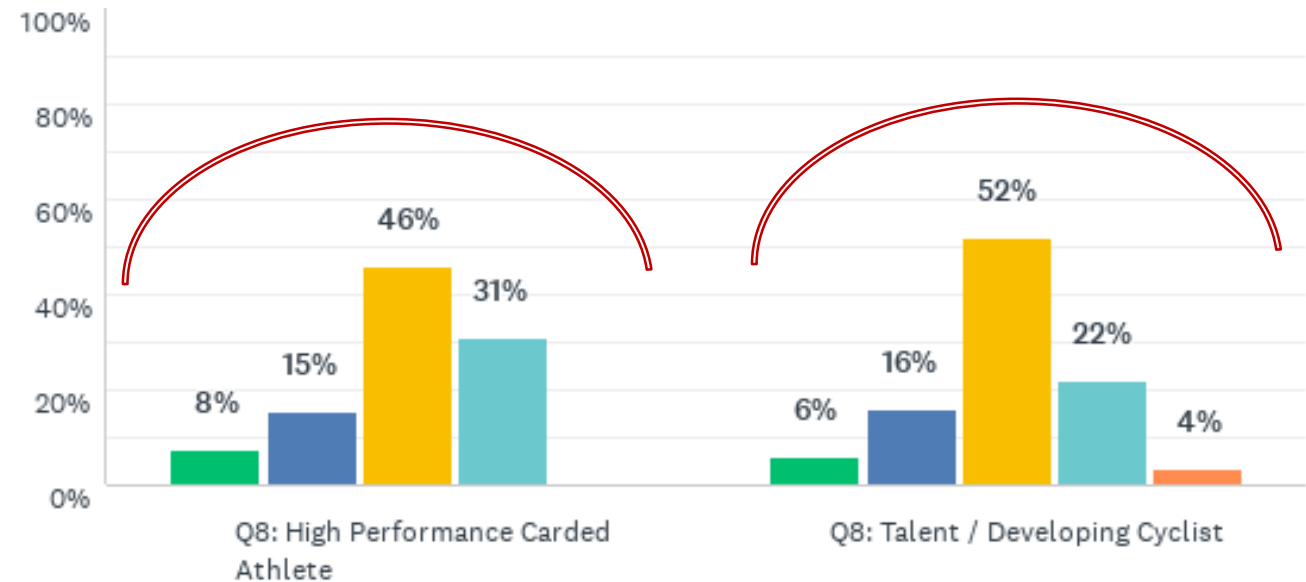


SUCCESS PERCEPTIONS ARE SIMILAR BETWEEN RECREATIONAL AND HP CYCLISTS – HALF SIT IN THE MIDDLE, WITH A QUARTER EITHER MORE OR LESS POSITIVE

Recreational cyclists

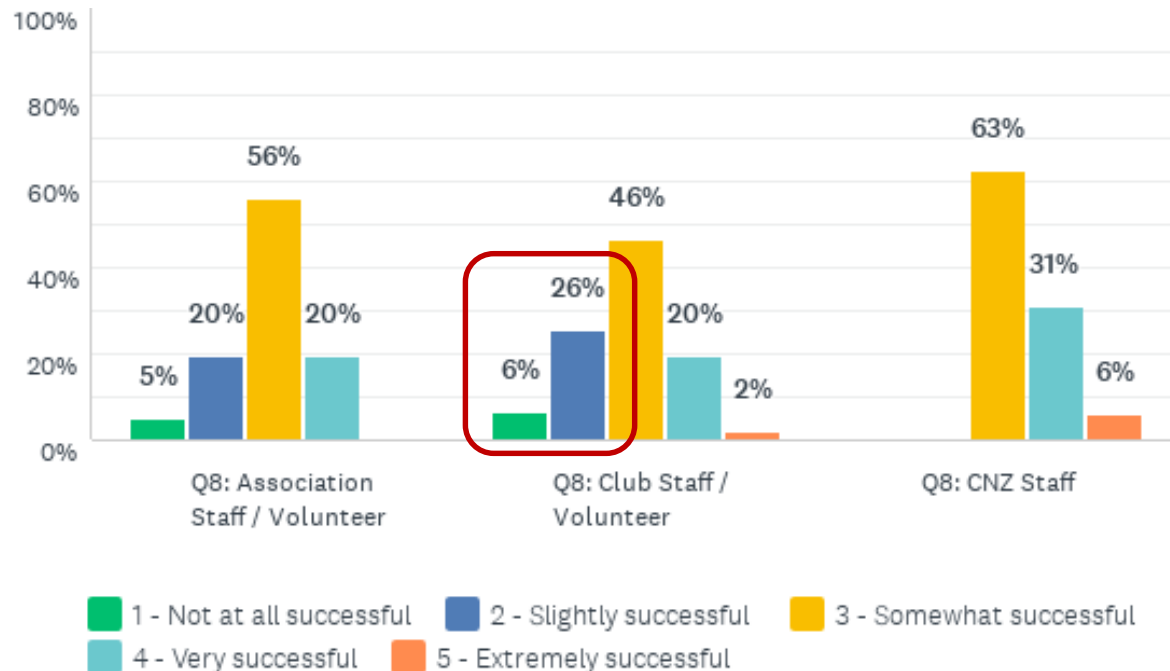


High Performance and Talented cyclists

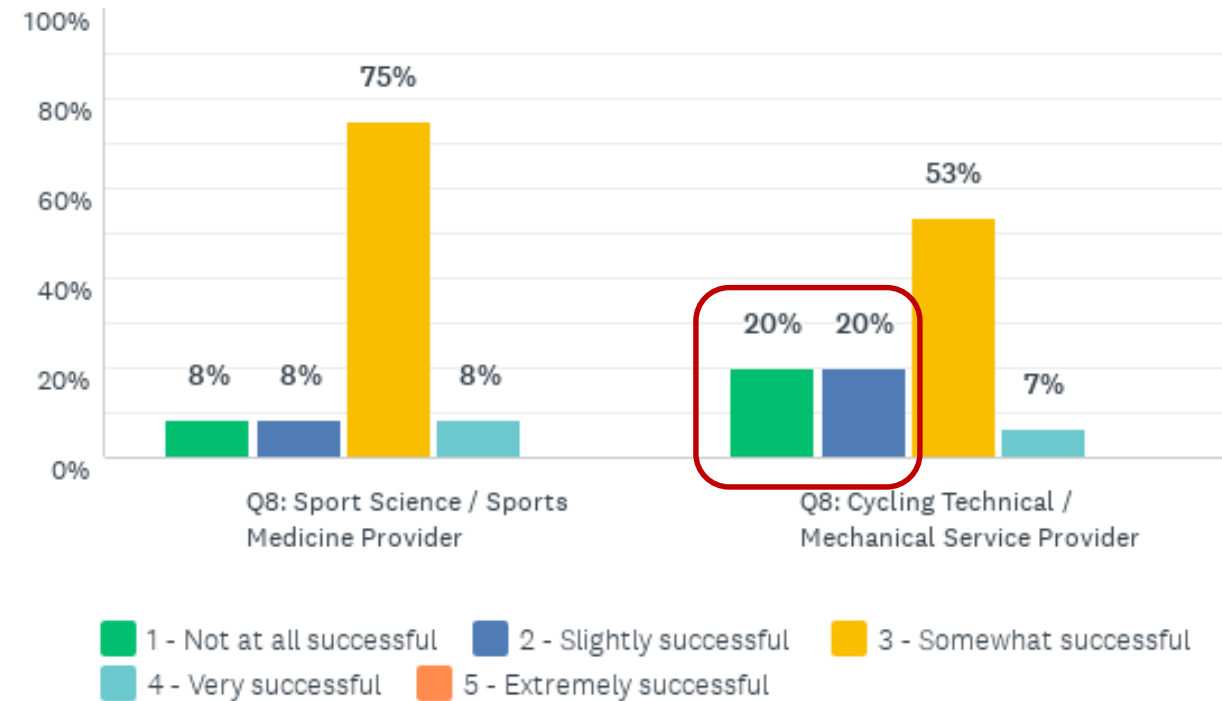


THOSE WORKING IN THE CYCLING SYSTEM IN TECH/MECH ROLES PERCEIVE LOWEST LEVELS OF SUCCESS (40%).

Organisational Staff/Volunteers



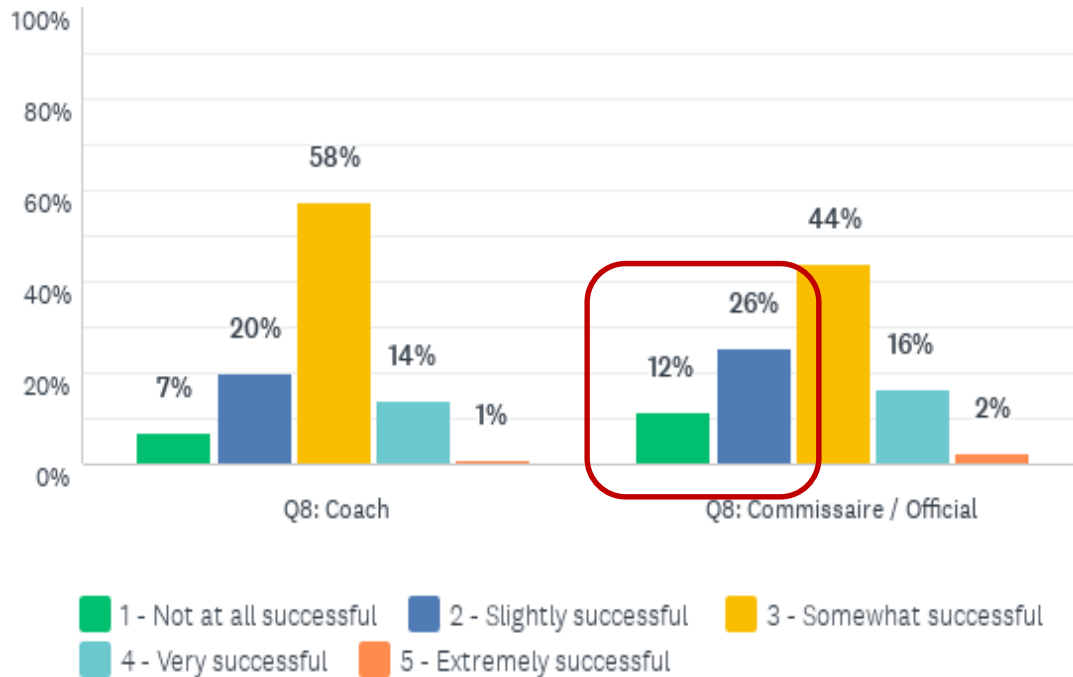
HP Staff



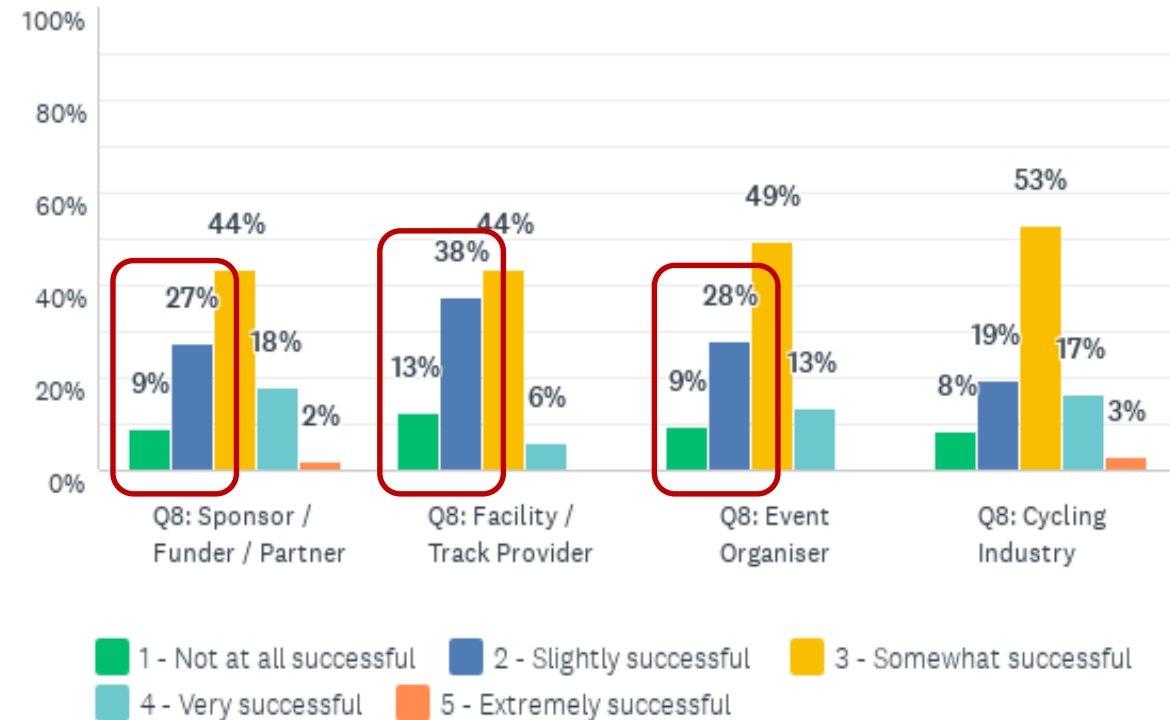
NEARLY A THIRD OF CLUB STAFF/VOLUNTEERS PERCEIVE LITTLE SUCCESS

INDUSTRY PARTNERS TEND TO PERCEIVE LOWER LEVELS OF SUCCESS

Coaches and Officials



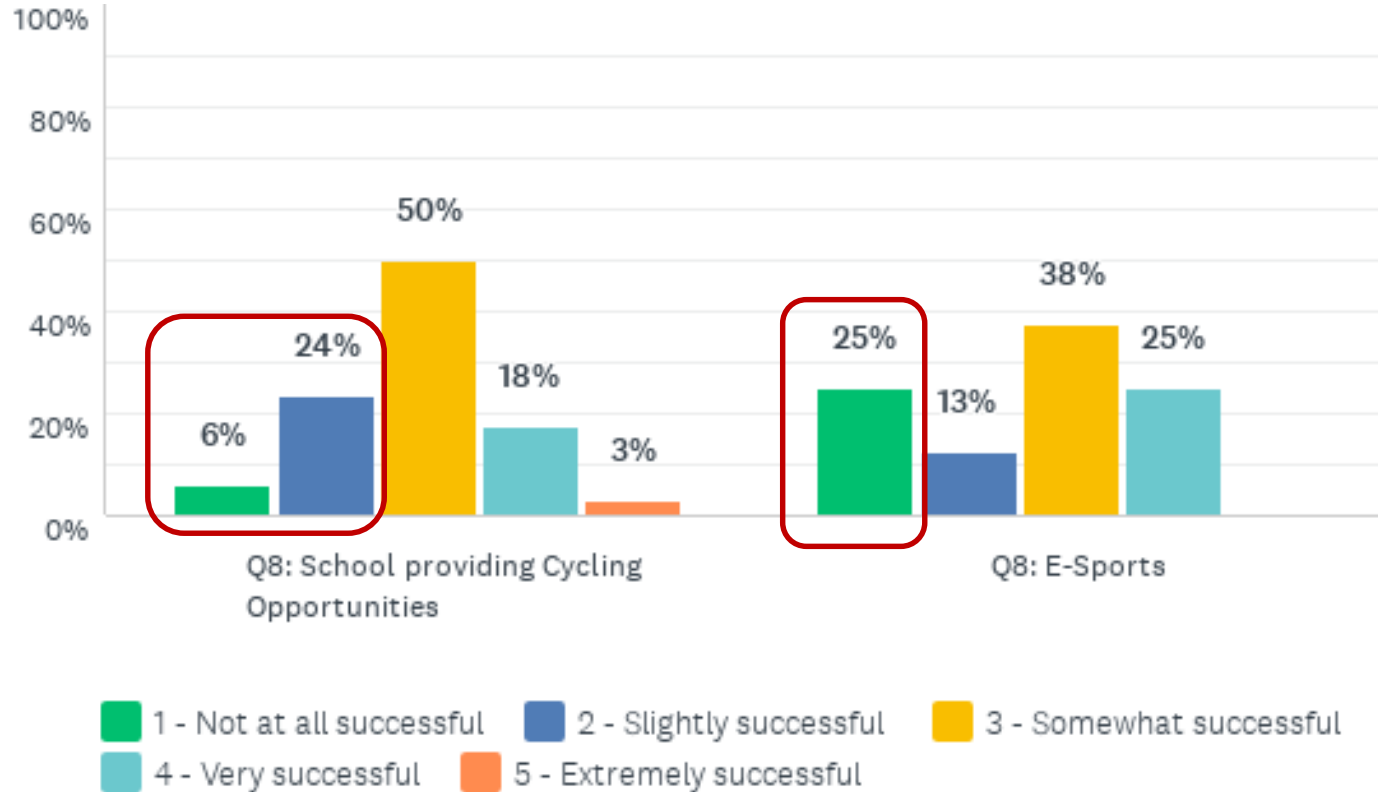
Industry Partners



OVER A THIRD (36%) OF SPONSORS/PARTNERS SEE LITTLE OR NO SUCCESS. AS DO OVER A THIRD (37%) OF EVENT ORGANISERS AND OVER HALF (51%) OF FACILITY/TRACK PROVIDERS

A QUARTER OF ALL E-SPORTS RESPONDENTS SEE NZ AS NOT AT ALL SUCCESSFUL

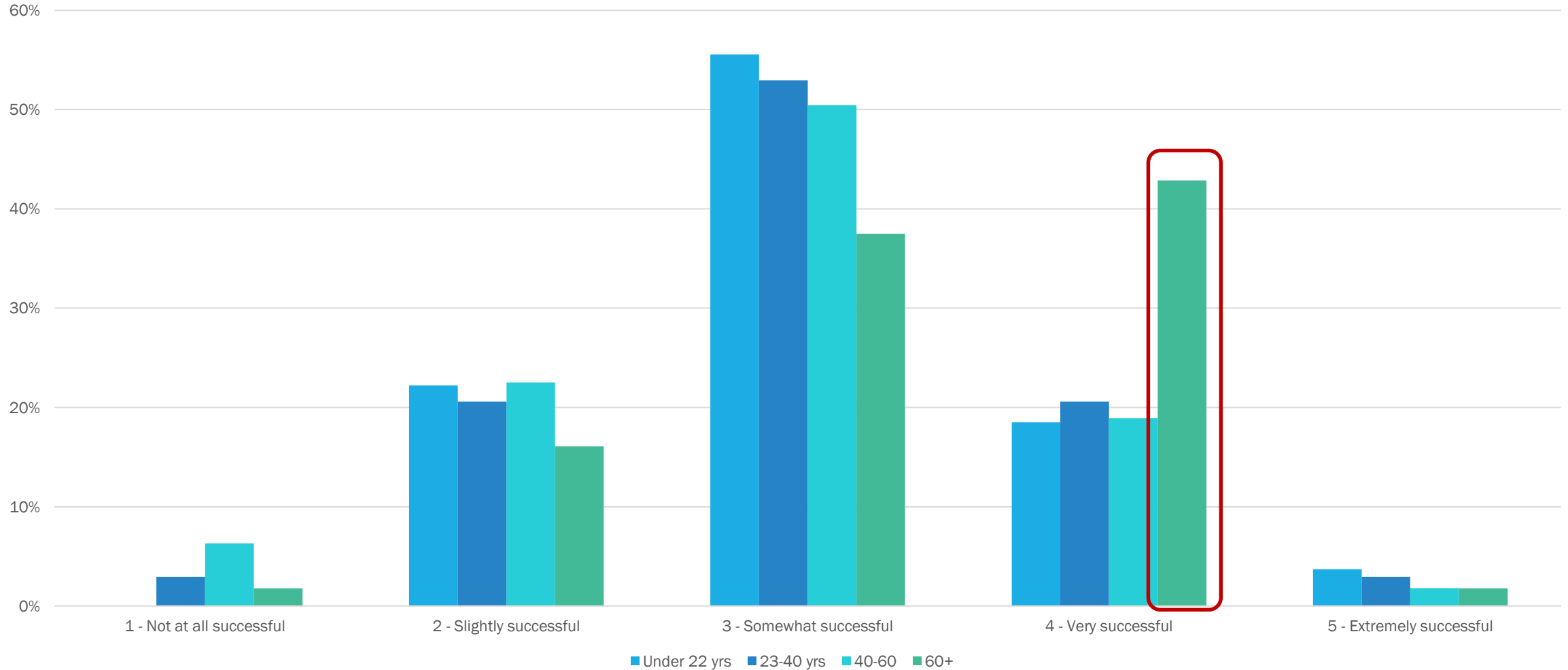
Schools



JUST UNDER A THIRD (30%) OF SCHOOLS PERCEIVE LIMITED SUCCESS

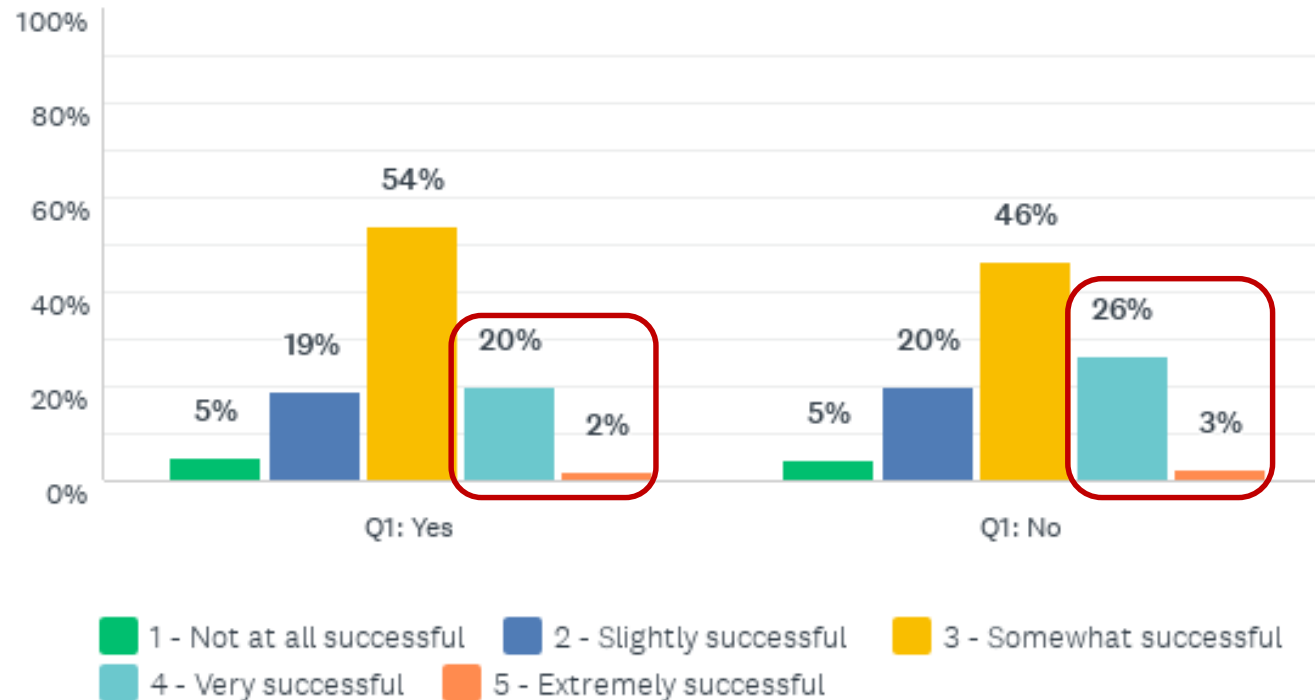
THE OVER 60'S AGE GROUP RATE CNZ AS MOST SUCCESSFUL OVERALL

Success ratings by age-group



OVERALL, UNLICENSED RIDERS SEE CNZ AS MORE SUCCESSFUL (29%) THAN LICENSED RIDERS (22%)

Q10 From your perspective, how would you rate the current success of Cycling New Zealand?



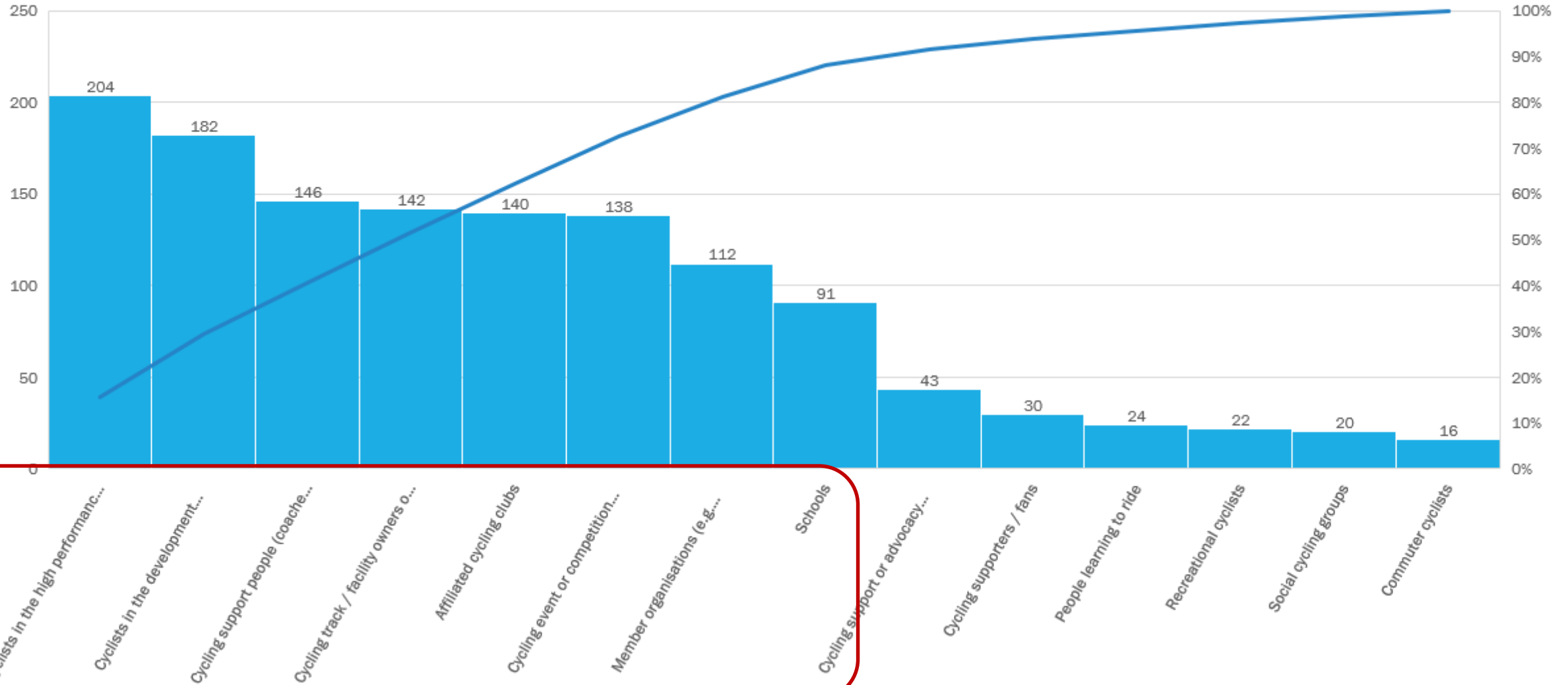
WHO BENEFITS FROM THE EFFORTS OF CNZ

WHO CURRENTLY DOES AND WHO SHOULD IN FUTURE?



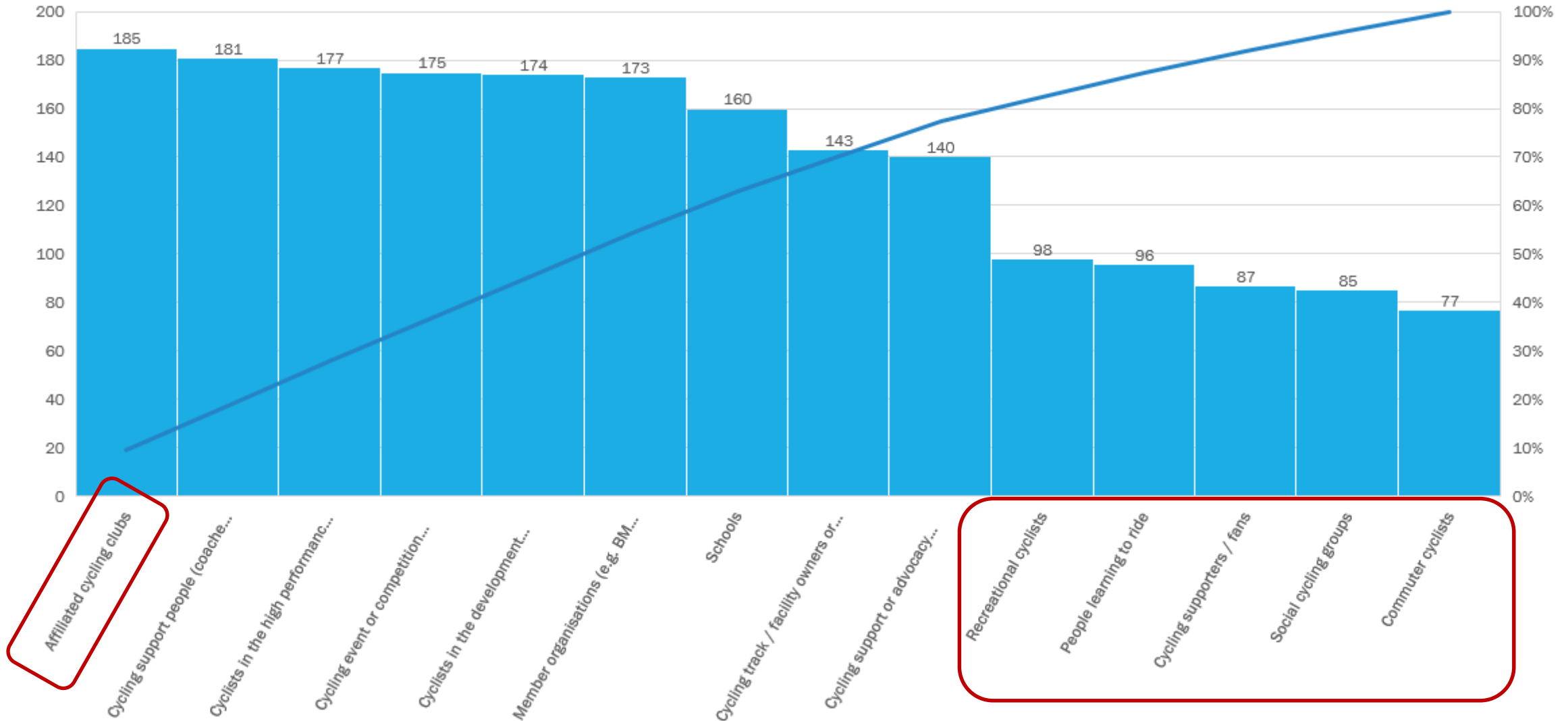
STRATEGIC REALITY

WHO BENEFITS FROM CNZ CURRENTLY? - THE CORE HP SYSTEM AND CONNECTED ECO-SYSTEM (MO'S, CLUBS, EVENTS) AND TO A LESSEr EXTENT, SCHOOLS



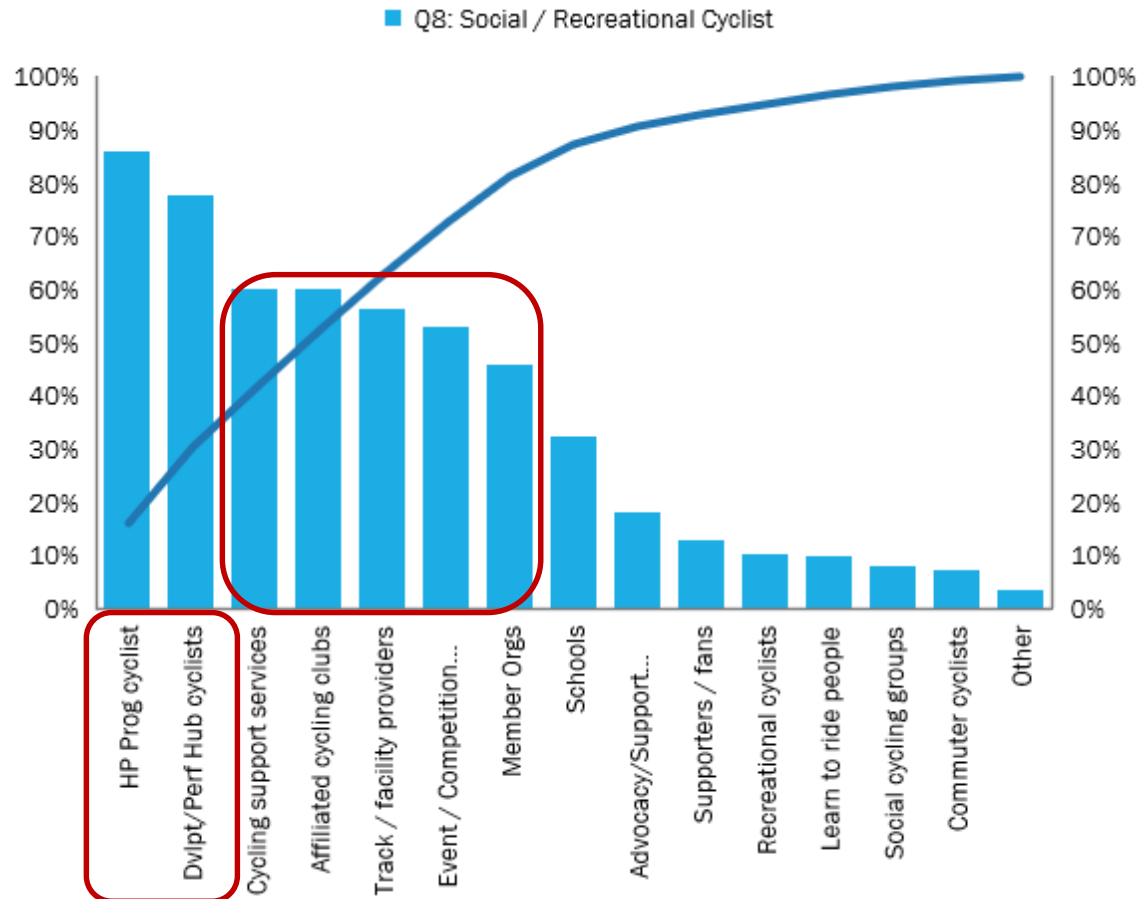
WHO SHOULD BENEFIT FROM CNZ IN FUTURE?

CLUBS, MO'S AND SCHOOLS RECEIVED EMPHASIS HERE.
RECREATIONAL, SOCIAL, LEARNERS AND COMMUTERS REMAIN A LOWER FOCUS

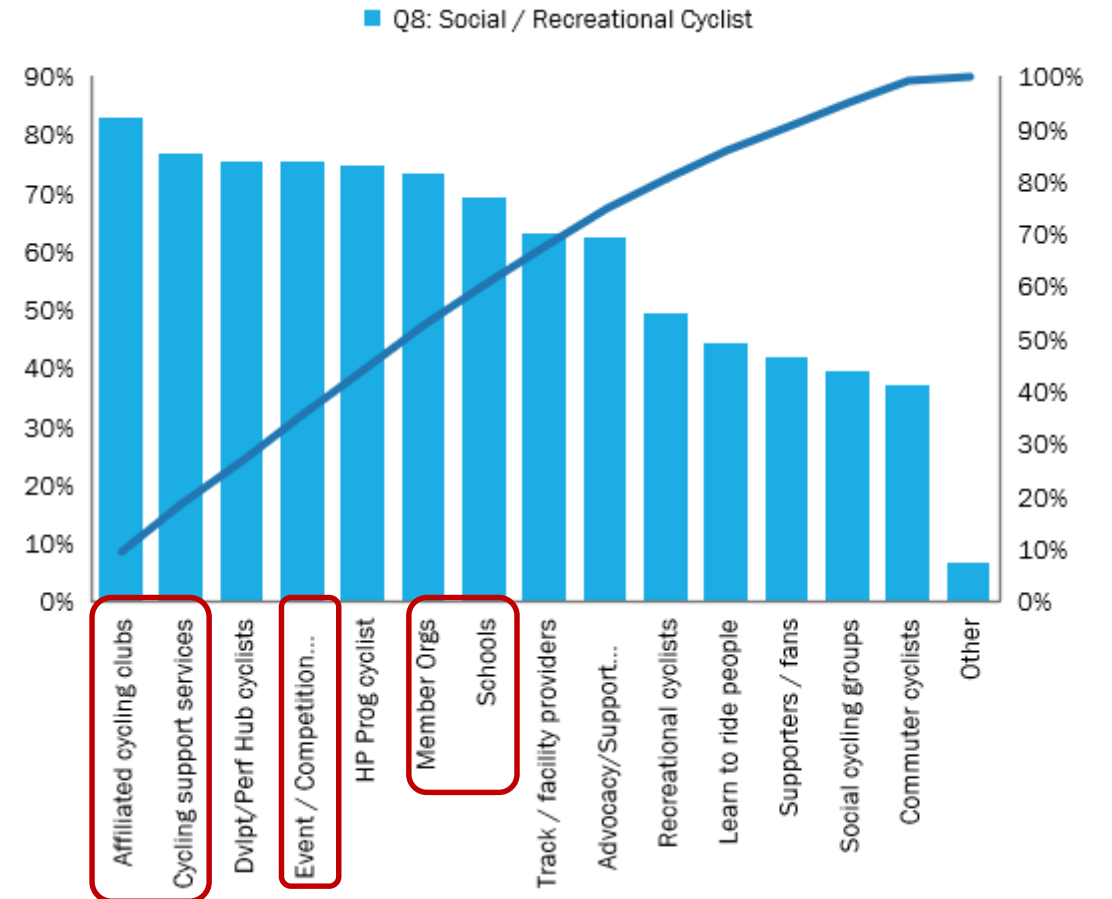


RECREATIONAL CYCLISTS SEE THE SIGNIFICANT BENEFITS PROVIDED TO HP & TALENT. AT LEAST HALF NOTE BENEFITS TO SUPPORT SERVICES, CLUBS, FACILITY PROVIDERS, EVENTS & MEMBER ORGANISATIONS

Currently benefit



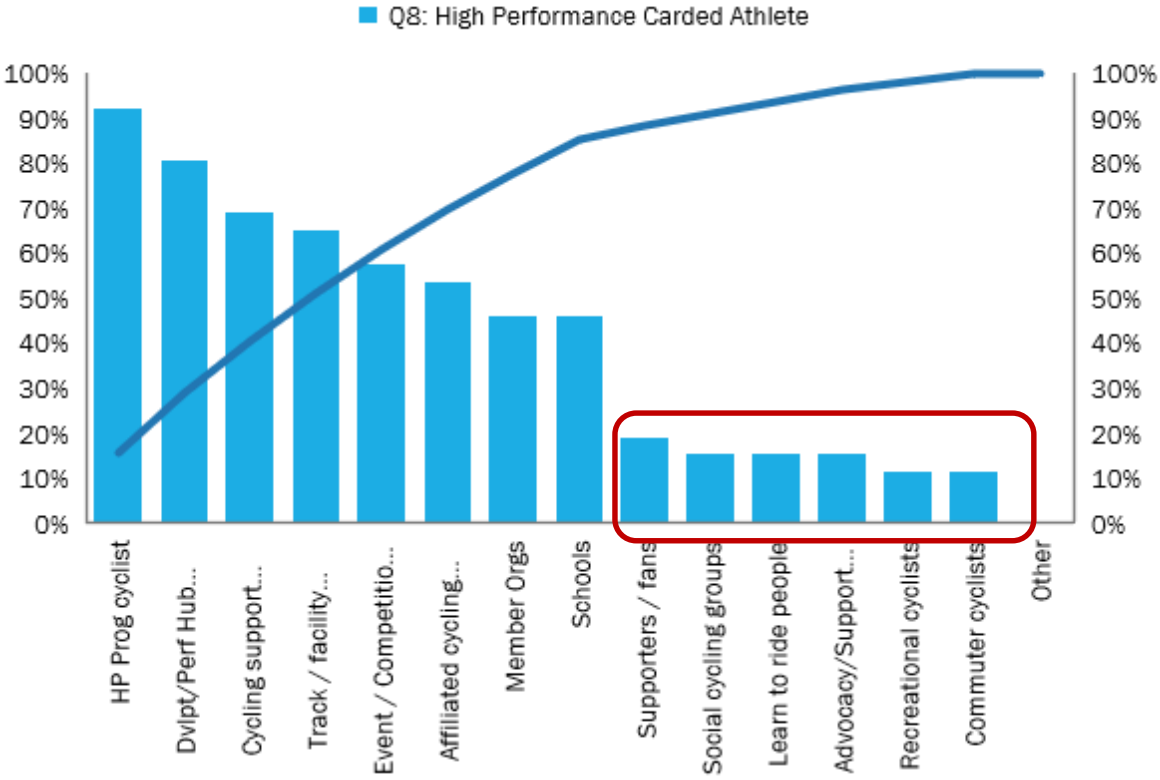
Should benefit



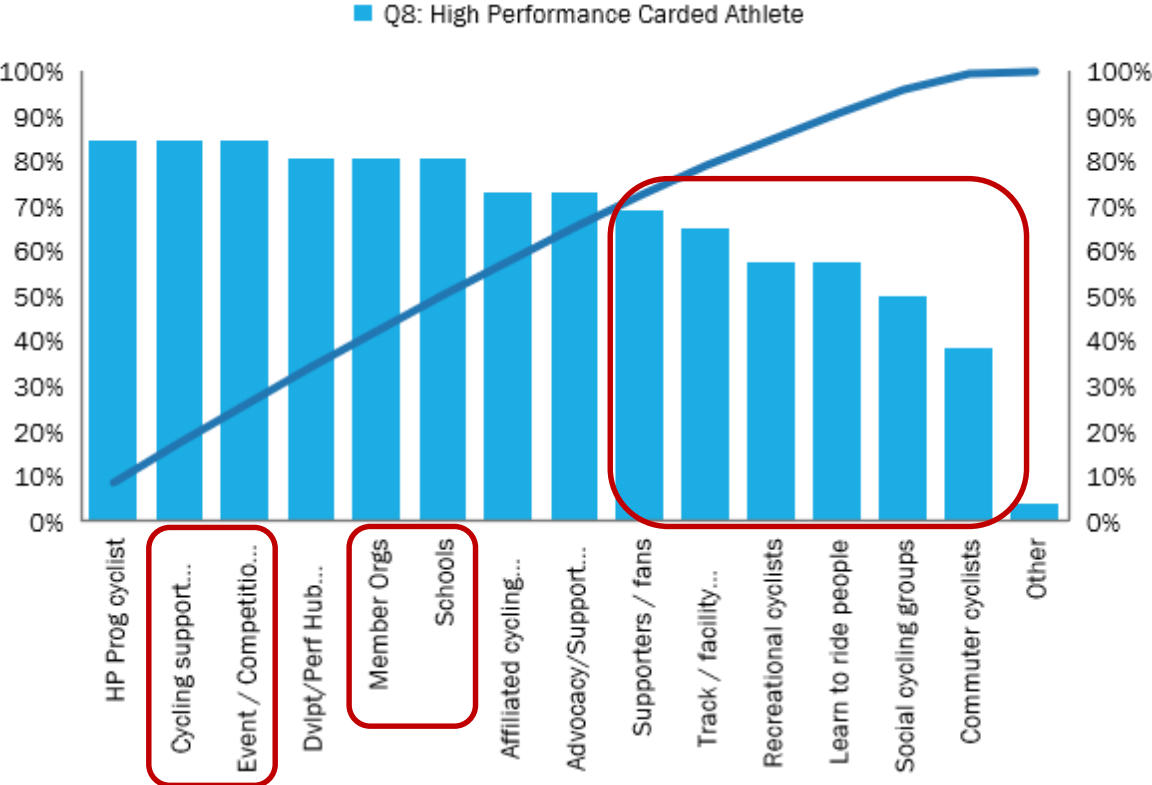
THEY WANT THE HP/DEV SIDE MAINTAINED, WITH AN INCREASED FOCUS ON CLUBS (60 → 83), SUPPORT SERVICES (60 → 76), EVENTS (53 → 75), MEMBER ORGS (46 → 74) & SCHOOLS (32 → 69)

HP AND DEVELOPING ATHLETES WANT THE HP/DEV SIDE MAINTAINED, WITH AN INCREASED FOCUS ON SUPPORT SERVICES (E.G. COACH/OFFICIALS) (69→85), EVENTS (58→85), MEMBER ORGANISATIONS (46→81) & SCHOOLS (46→81)

Currently benefit

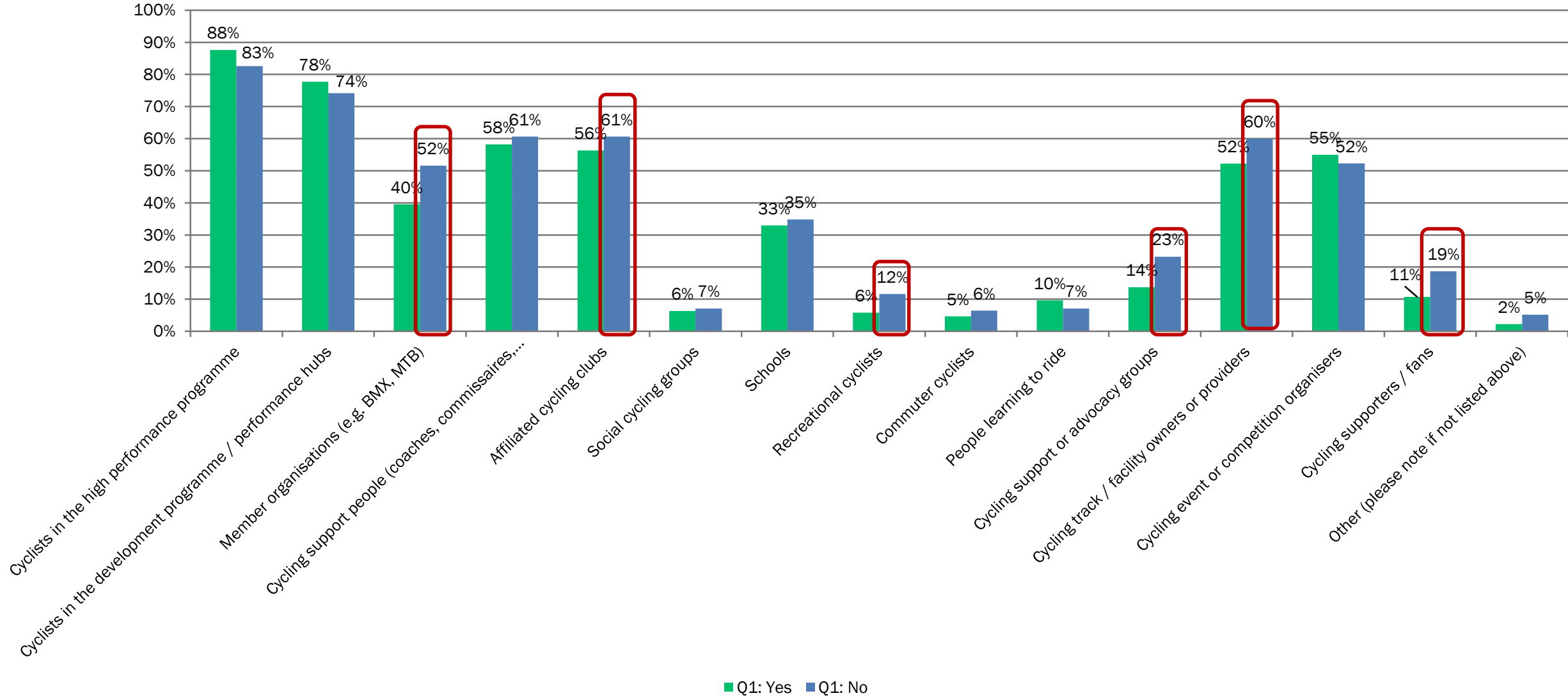


Should benefit

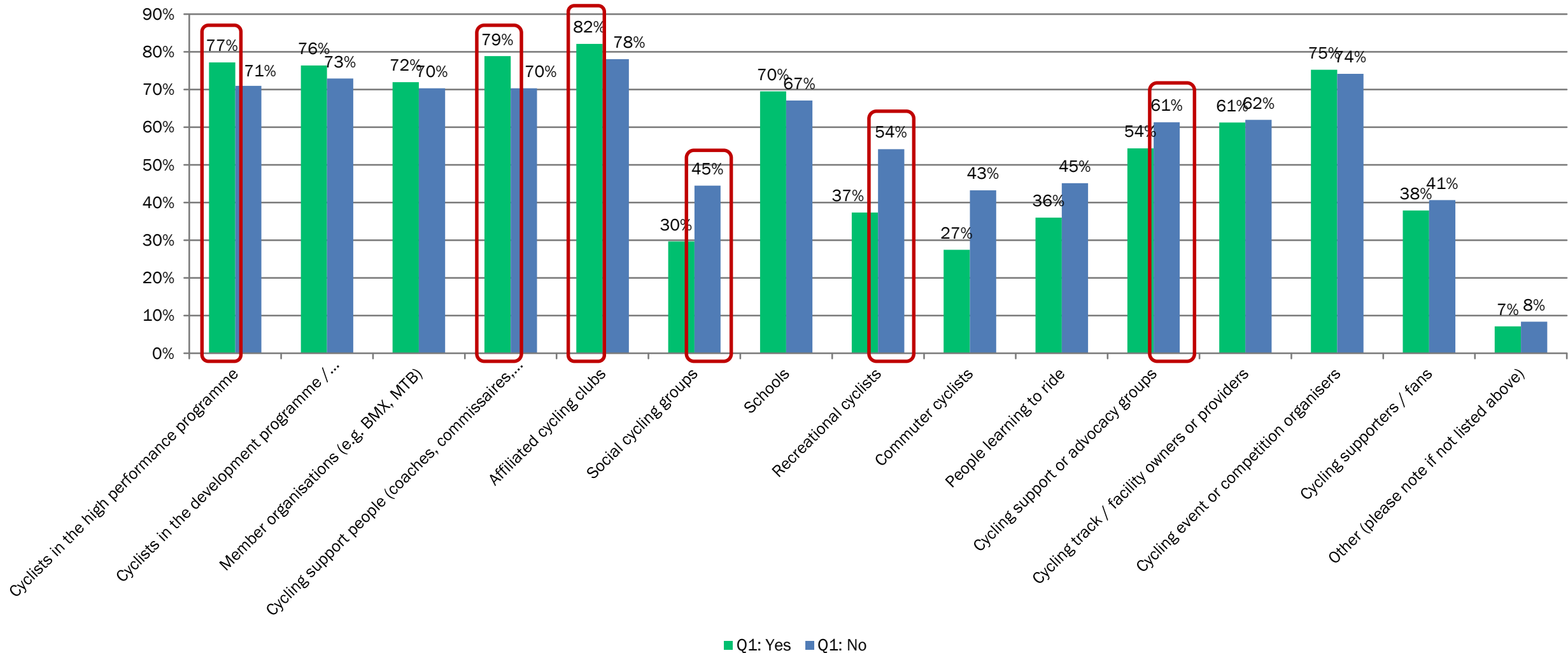


THEY HAVE HIGH EXPECTATIONS FOR MORE BENEFITS ACROSS THE BOARD. OVER HALF WANT MORE FOCUS ON FANS (19→69) SOCIAL CYCLISTS (11→58) AND LEARN TO RIDE (15→58)

UNLICENSED RIDERS SEE HIGHER BENEFITS NOW FOR FANS (+8%), FACILITY PROVIDERS (+8%), MEMBER ORGS (+8%) & CLUBS (+5%) THAN LICENSED RIDERS



IN TERMS OF WHO SHOULD BENEFIT, UNLICENSED RIDERS ARE THE ONES MORE LIKELY TO INDICATE RECREATIONAL CYCLISTS (17%), SOCIAL CYCLING GROUPS (+15%) & ADVOCACY GROUPS (+7%) THAN LICENSED RIDERS



CNZ POSITIVE IMPACTS ACROSS CYCLING IN NZ

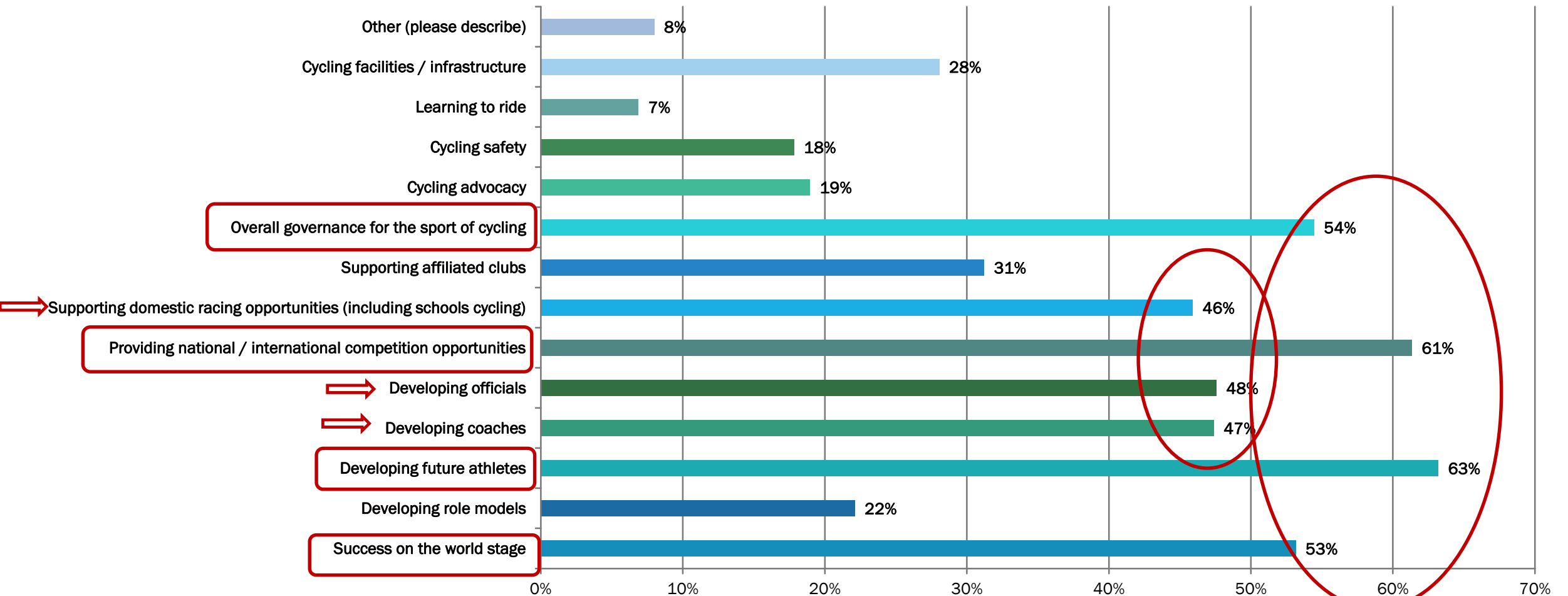
WHAT THE CURRENT AREAS OF IMPACT ARE AND WHERE CNZ COULD IMPROVE THEIR IMPACT



STRATEGIC REALITY

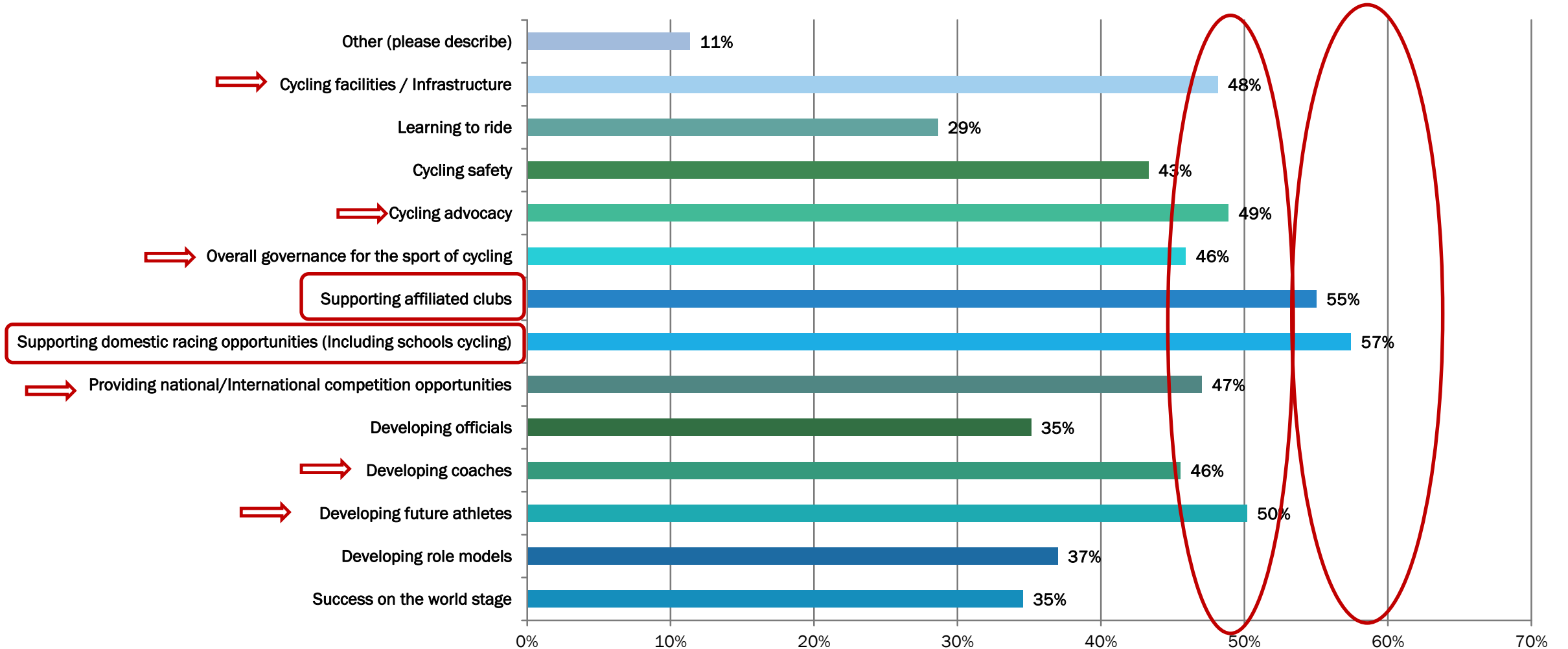
AREAS OF POSITIVE IMPACT ACROSS CYCLING IN NZ CURRENTLY

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)



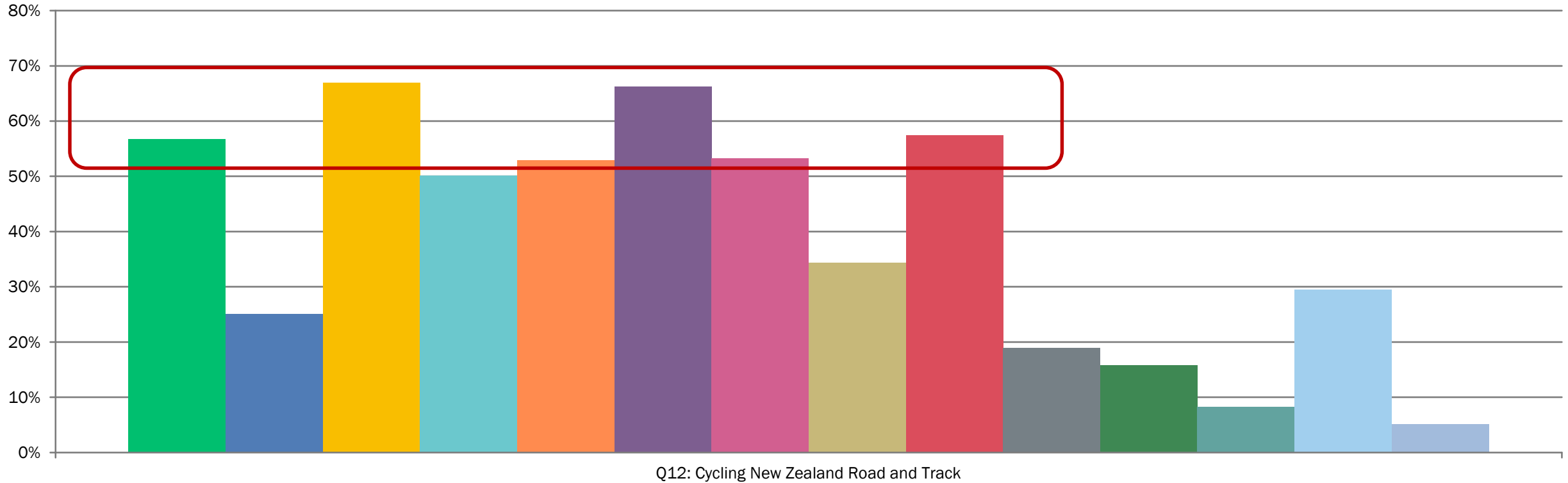
AREAS TO IMPROVE IMPACT

Select the areas where CNZ could improve their impact in future? (tick all that apply)



AREAS OF POSITIVE IMPACT – PERSPECTIVE OF ROAD & TRACK

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)



Success on the world stage

Developing coaches

Supporting domestic racing opportunities (including schools cycling)

Cycling advocacy

Cycling facilities / infrastructure

Developing role models

Developing officials

Supporting affiliated clubs

Cycling safety

Other (please describe)

Developing future athletes

Providing national / international competition opportunities

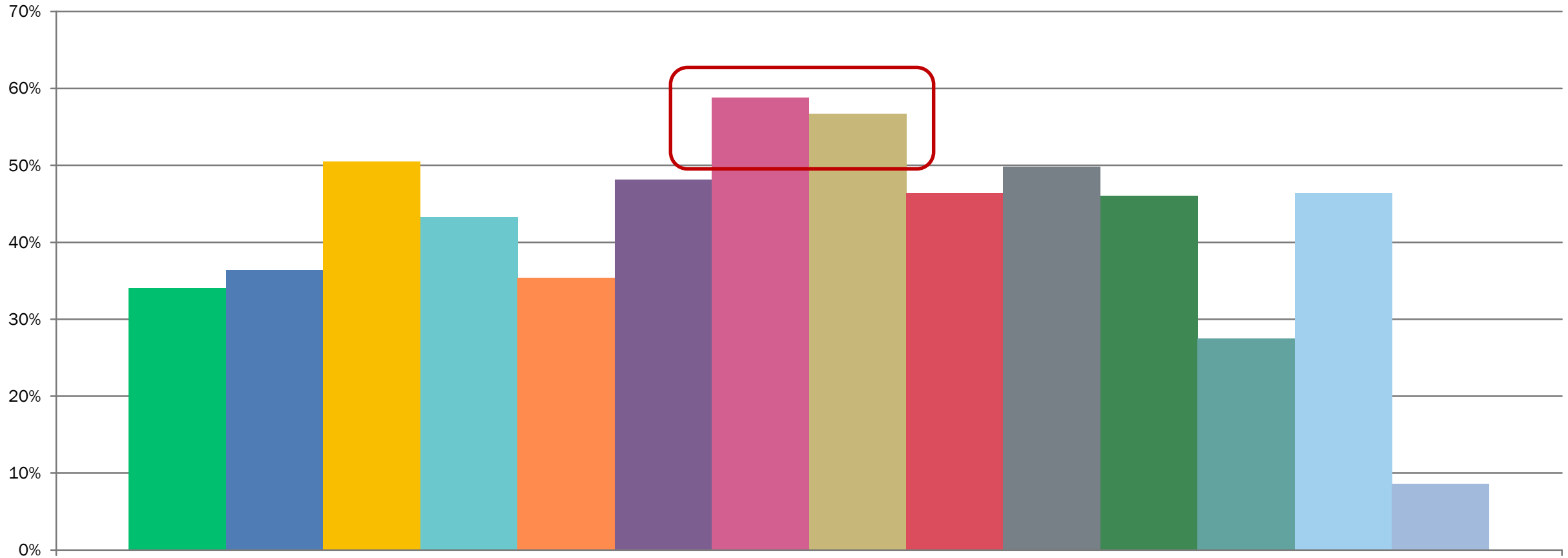
Overall governance for the sport of cycling

Learning to ride

Q12: Cycling New Zealand Road and Track

AREAS TO IMPROVE IMPACT – PERSPECTIVE OF ROAD & TRACK

Select the areas where CNZ could improve their impact in future? (tick all that apply)

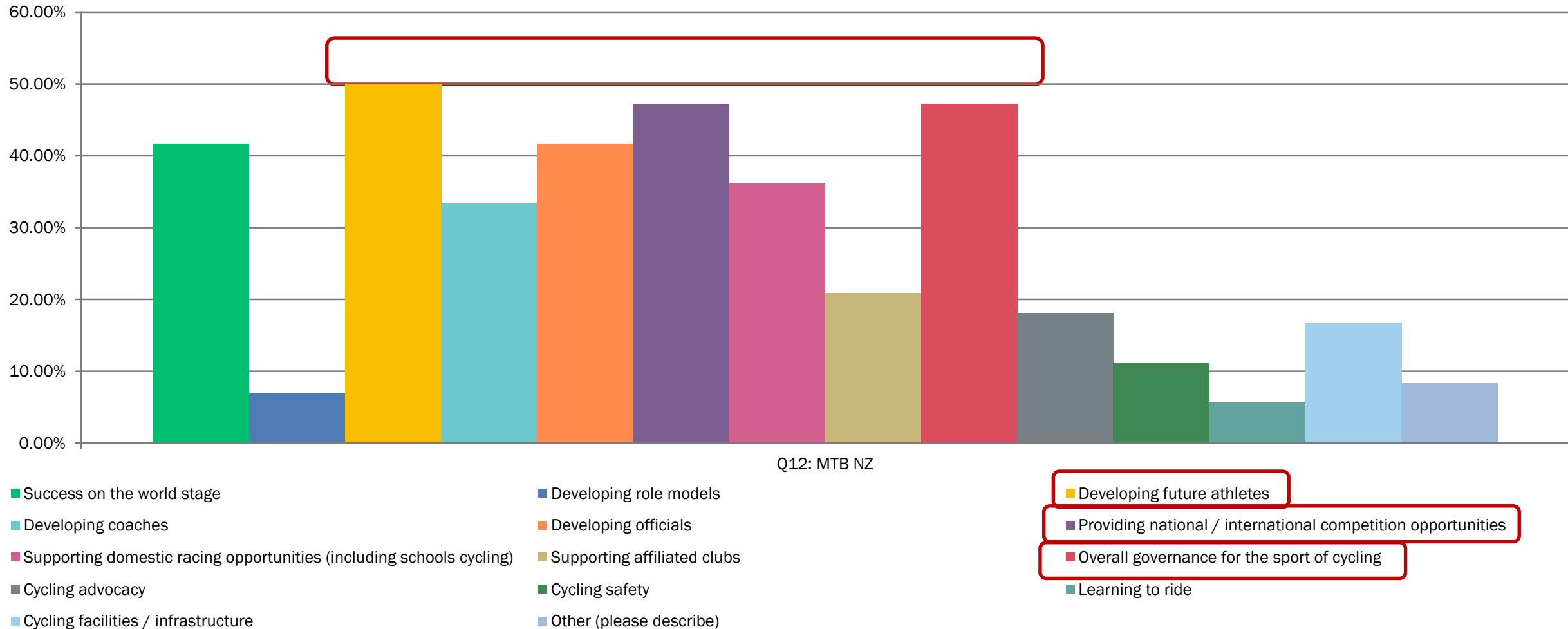


Q12: Cycling New Zealand Road and Track

- Success on the world stage
- Developing role models
- Developing future athletes
- Developing coaches
- Developing officials
- Providing national/International competition opportunities
- Supporting domestic racing opportunities (Including schools cycling)
- Supporting affiliated clubs
- Overall governance for the sport of cycling
- Cycling advocacy
- Cycling safety
- Learning to ride
- Cycling facilities / Infrastructure
- Other (please describe)

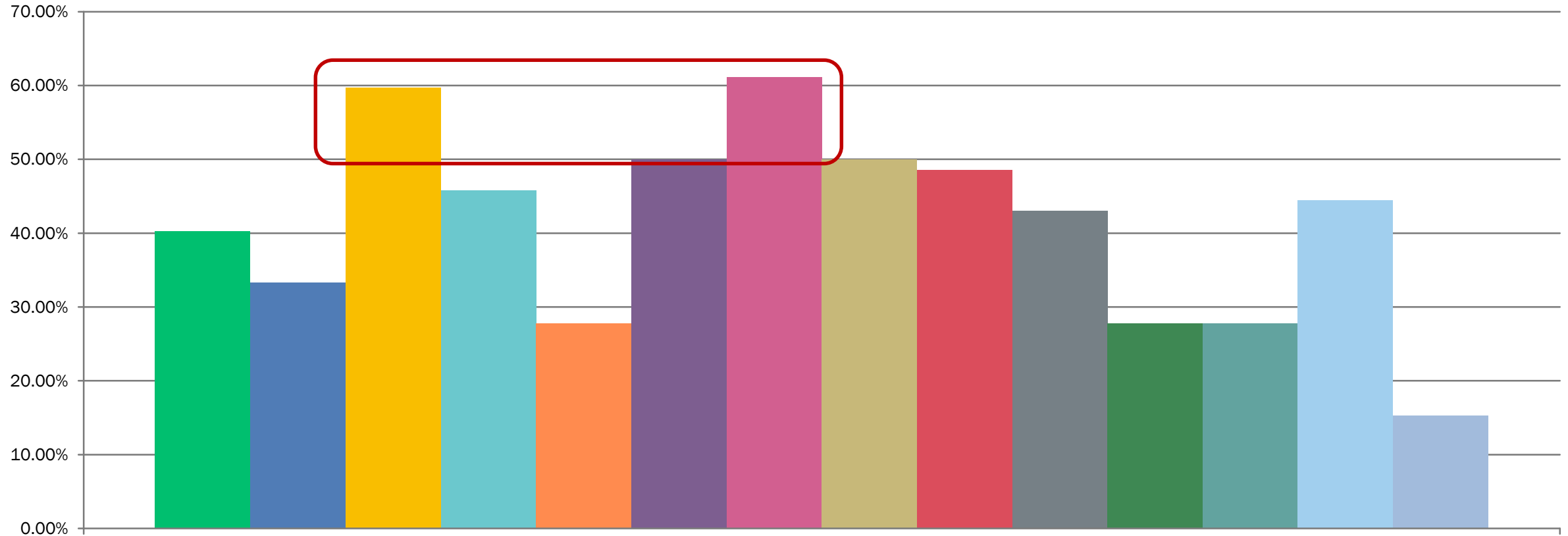
AREAS OF POSITIVE IMPACT – PERSPECTIVE OF MTB

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)



AREAS TO IMPROVE IMPACT – PERSPECTIVE OF MTB

Select the areas where CNZ could improve their impact in future? (tick all that apply)



Q12: MTB NZ

■ Success on the world stage

■ Developing coaches

■ Supporting domestic racing opportunities (Including schools cycling)

■ Cycling advocacy

■ Cycling facilities / Infrastructure

■ Developing role models

■ Developing officials

■ Supporting affiliated clubs

■ Cycling safety

■ Other (please describe)

■ Developing future athletes

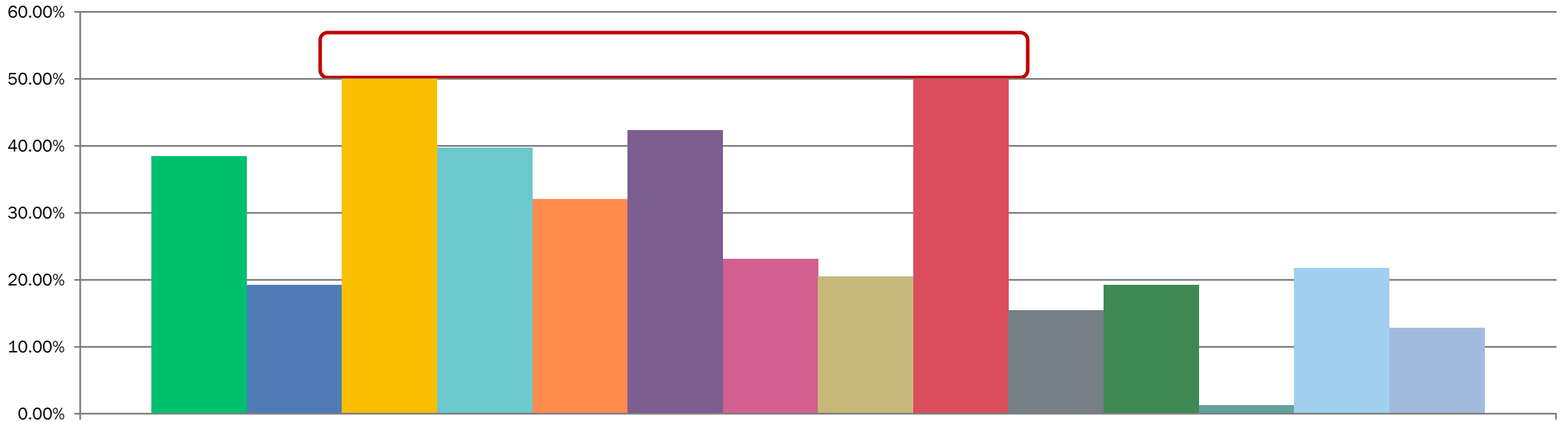
■ Providing national/International competition opportunities

■ Overall governance for the sport of cycling

■ Learning to ride

AREAS OF POSITIVE IMPACT – PERSPECTIVE OF BMX

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)



Q12: BMX NZ

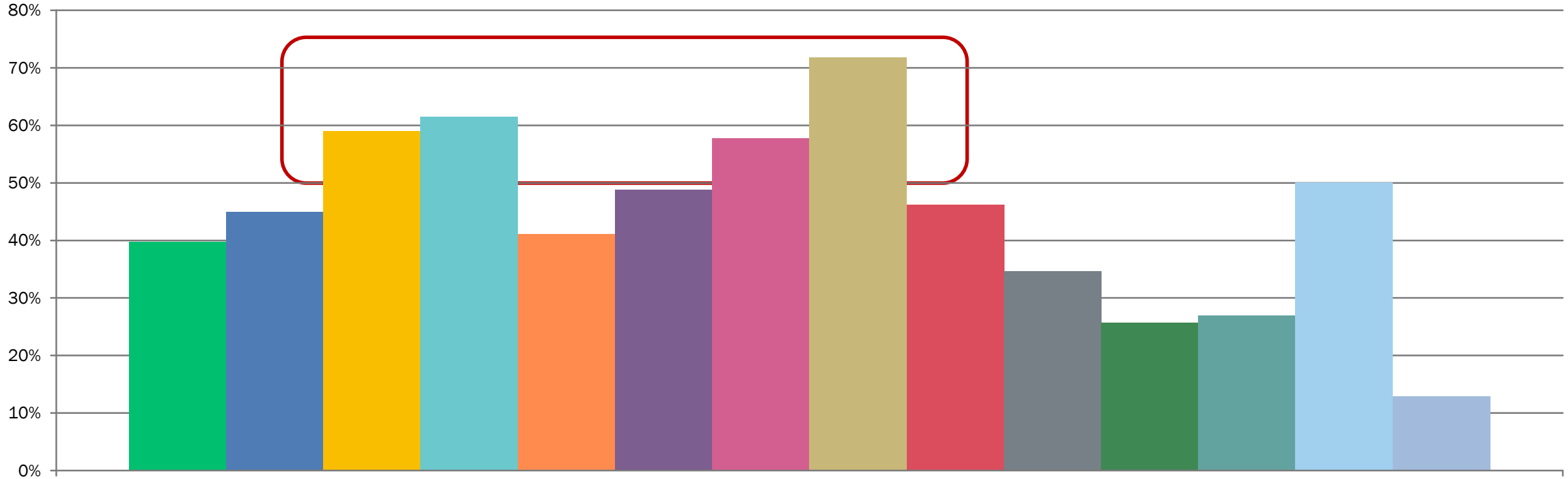
- Success on the world stage
- Developing coaches
- Supporting domestic racing opportunities (including schools cycling)
- Cycling advocacy
- Cycling facilities / infrastructure

- Developing role models
- Developing officials
- Supporting affiliated clubs
- Cycling safety
- Other (please describe)

- Developing future athletes
- Providing national / international competition opportunities
- Overall governance for the sport of cycling
- Learning to ride

AREAS TO IMPROVE IMPACT – PERSPECTIVE OF BMX

Select the areas where CNZ could improve their impact in future? (tick all that apply)



Q12: BMX NZ

■ Success on the world stage

■ Developing role models

■ Developing future athletes

■ Developing coaches

■ Developing officials

■ Providing national/International competition opportunities

■ Supporting domestic racing opportunities (Including schools cycling)

■ Supporting affiliated clubs

■ Overall governance for the sport of cycling

■ Cycling advocacy

■ Cycling safety

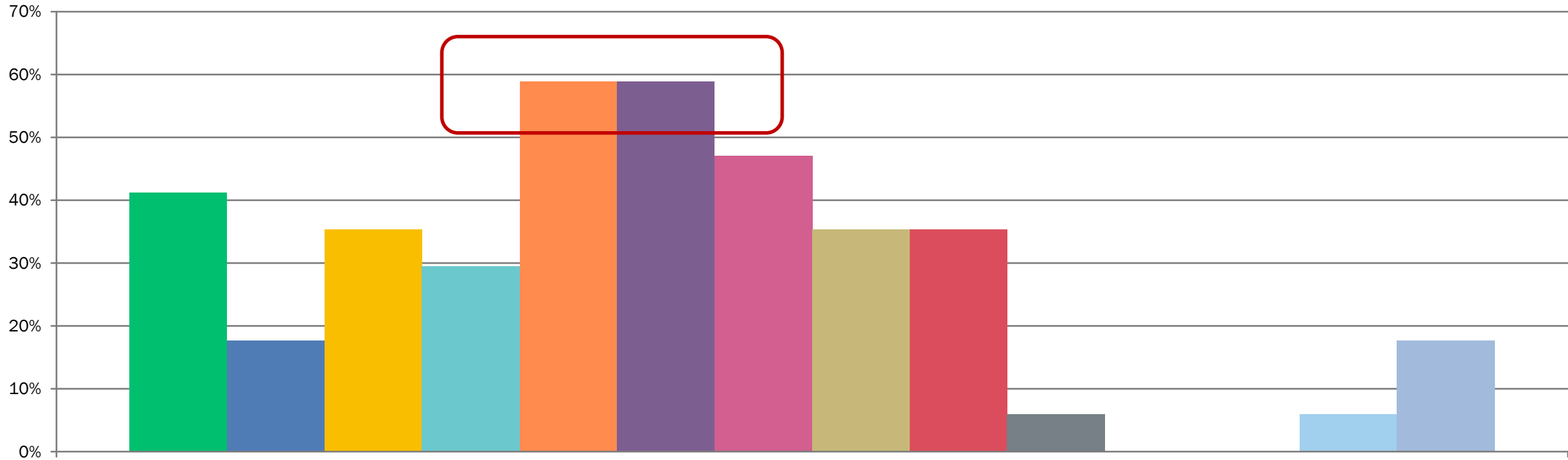
■ Learning to ride

■ Cycling facilities / Infrastructure

■ Other (please describe)

AREAS OF POSITIVE IMPACT – PERSPECTIVE OF CYCLO-CROSS

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)



Q12: Cyclo Cross

■ Success on the world stage

■ Developing coaches

■ Supporting domestic racing opportunities (including schools cycling)

■ Cycling advocacy

■ Cycling facilities / infrastructure

■ Developing role models

■ Developing officials

■ Supporting affiliated clubs

■ Cycling safety

■ Other (please describe)

■ Developing future athletes

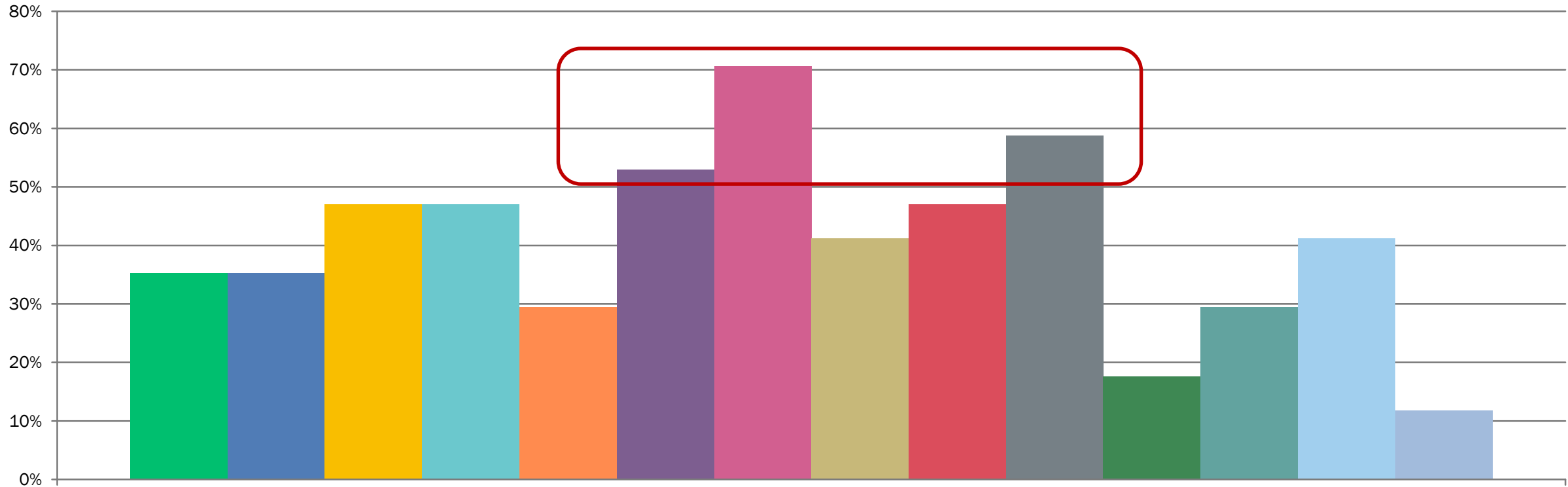
■ Providing national / international competition opportunities

■ Overall governance for the sport of cycling

■ Learning to ride

AREAS TO IMPROVE IMPACT – PERSPECTIVE OF CYCLO-CROSS

Select the areas where CNZ could improve their impact in future? (tick all that apply)



Q12: Cyclo Cross

■ Success on the world stage

■ Developing coaches

■ Supporting domestic racing opportunities (Including schools cycling)

■ Cycling advocacy

■ Cycling facilities / Infrastructure

■ Developing role models

■ Developing officials

■ Supporting affiliated clubs

■ Cycling safety

■ Other (please describe)

■ Developing future athletes

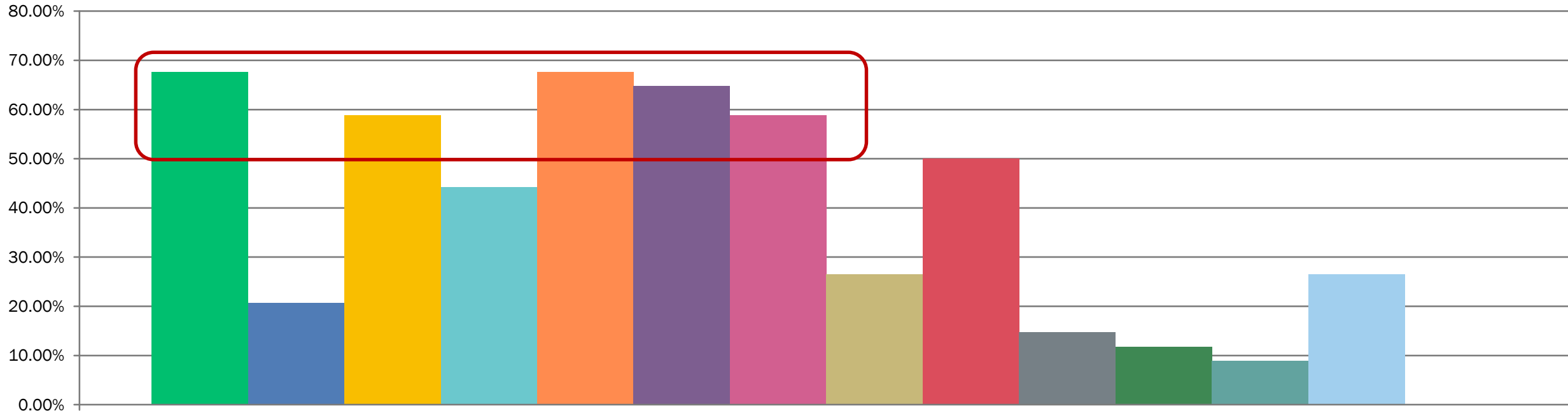
■ Providing national/International competition opportunities

■ Overall governance for the sport of cycling

■ Learning to ride

AREAS OF POSITIVE IMPACT – PERSPECTIVE OF SCHOOLS

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)

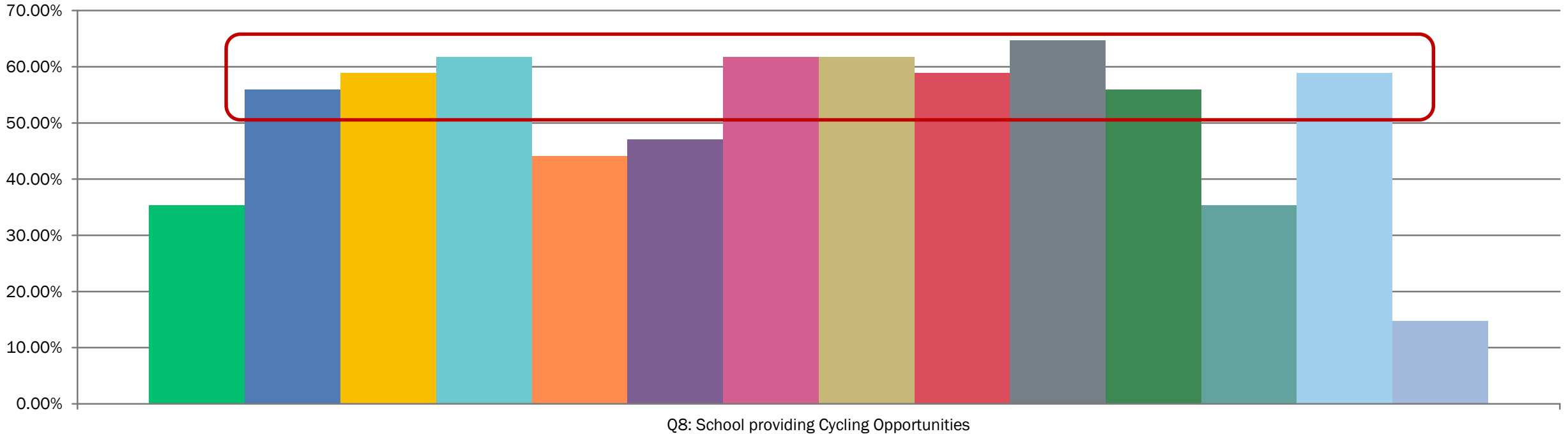


Q8: School providing Cycling Opportunities

- Success on the world stage
- Developing future athletes
- Providing national / international competition opportunities
- Supporting domestic racing opportunities (including schools cycling)
- Developing coaches
- Developing officials
- Overall governance for the sport of cycling
- Cycling advocacy
- Supporting affiliated clubs
- Learning to ride
- Developing role models
- Cycling safety
- Cycling facilities / infrastructure
- Other (please describe)

AREAS TO IMPROVE IMPACT – PERSPECTIVE OF SCHOOLS

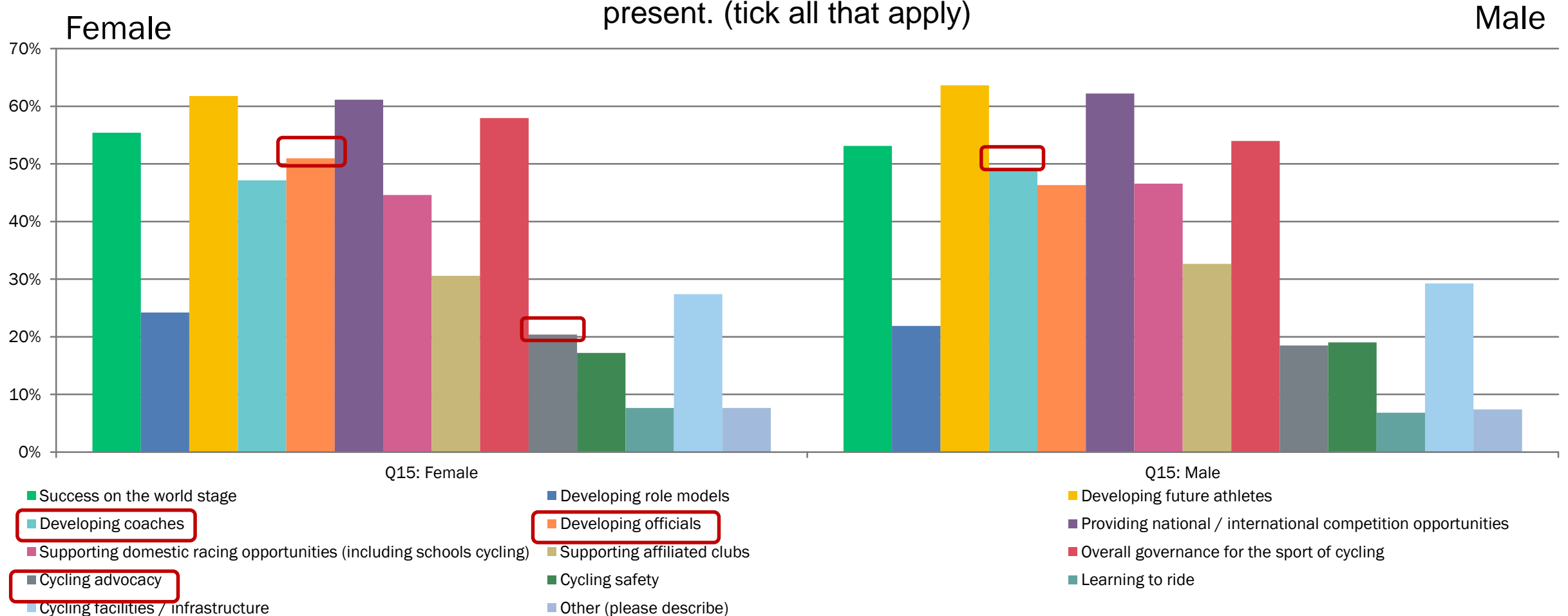
Select the areas where CNZ could improve their impact in future? (tick all that apply)



- Success on the world stage
- Developing role models
- Developing future athletes
- Developing coaches
- Developing officials
- Providing national/International competition opportunities
- Supporting domestic racing opportunities (Including schools cycling)
- Supporting affiliated clubs
- Overall governance for the sport of cycling
- Cycling advocacy
- Cycling safety
- Learning to ride
- Cycling facilities / Infrastructure
- Other (please describe)

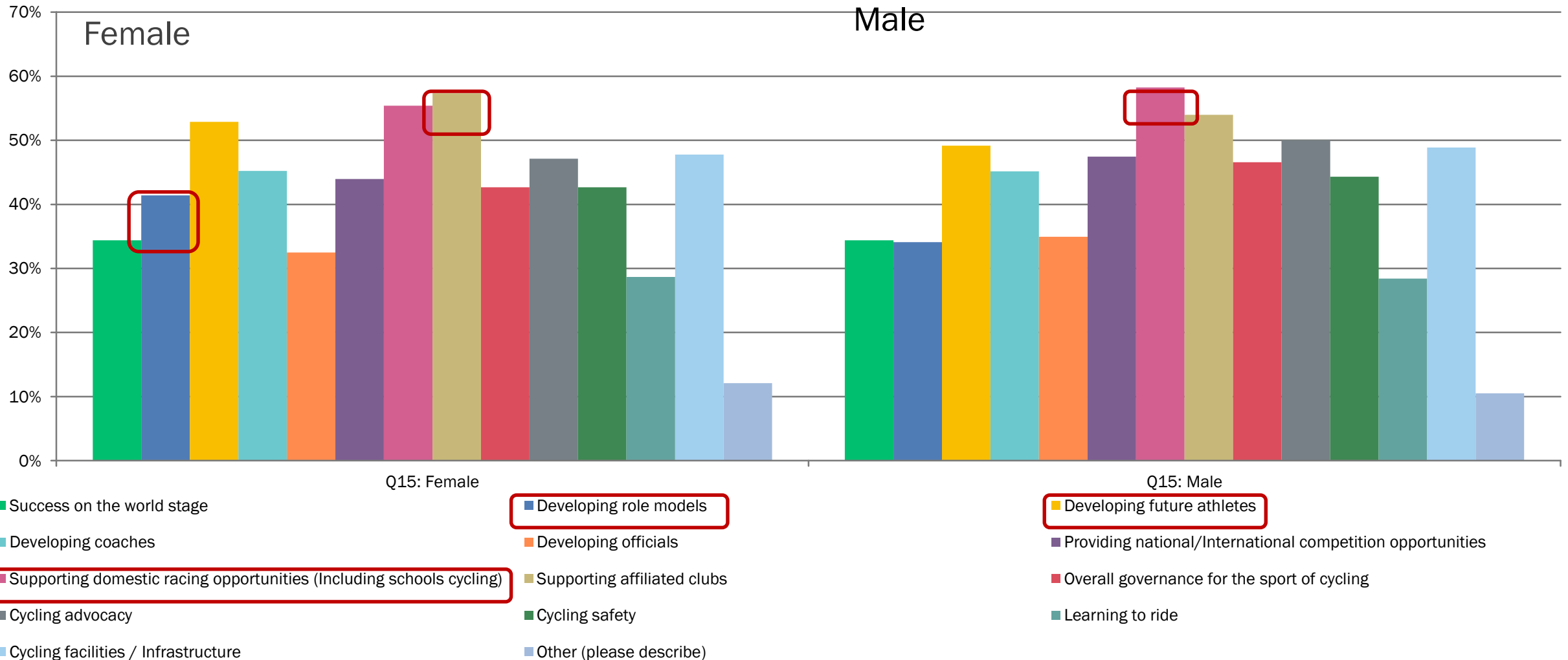
AREAS OF POSITIVE IMPACT – PERSPECTIVE BY GENDER

Select the areas you believe CNZ positively impacts across cycling in New Zealand at present. (tick all that apply)



AREAS TO IMPROVE IMPACT – PERSPECTIVE BY GENDER

Select the areas where CNZ could improve their impact in future? (tick all that apply)



Q15: Female

Q15: Male

■ Success on the world stage

■ Developing coaches

■ Supporting domestic racing opportunities (Including schools cycling)

■ Cycling advocacy

■ Cycling facilities / Infrastructure

■ Developing role models

■ Developing officials

■ Supporting affiliated clubs

■ Cycling safety

■ Other (please describe)

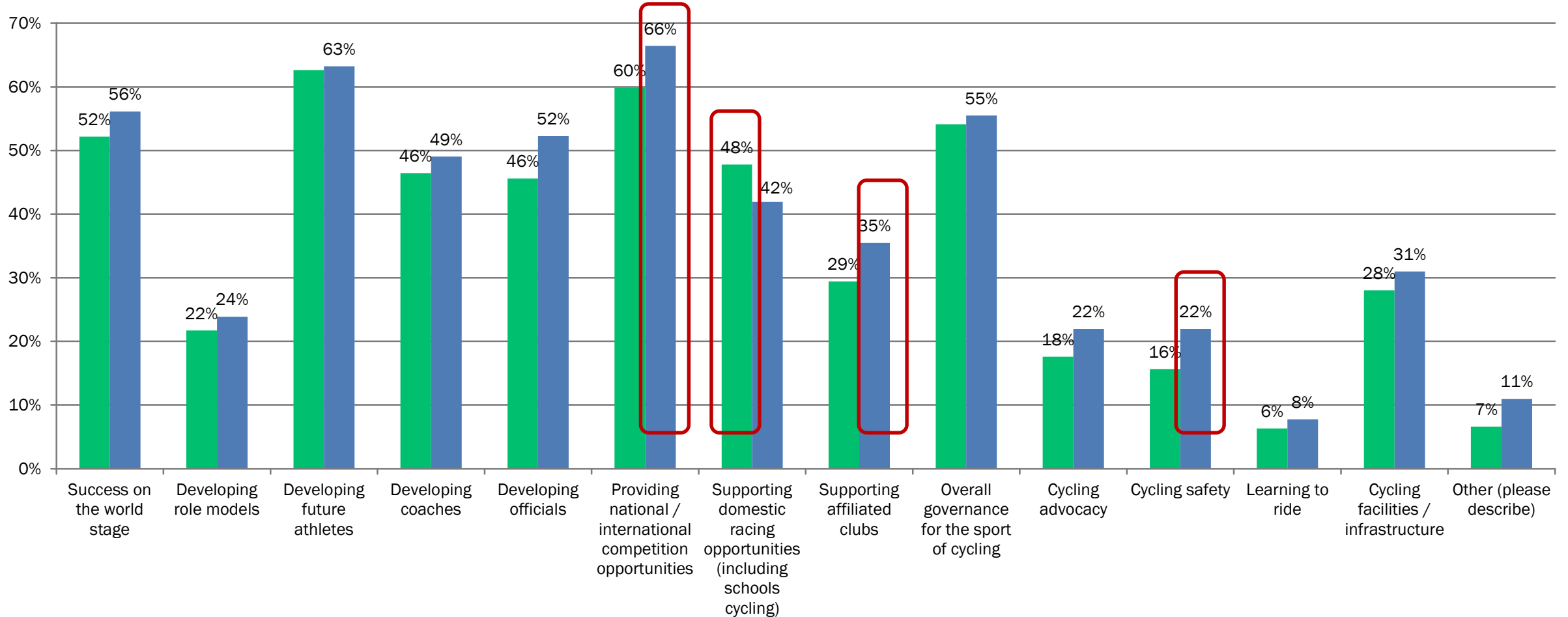
■ Developing future athletes

■ Providing national/International competition opportunities

■ Overall governance for the sport of cycling

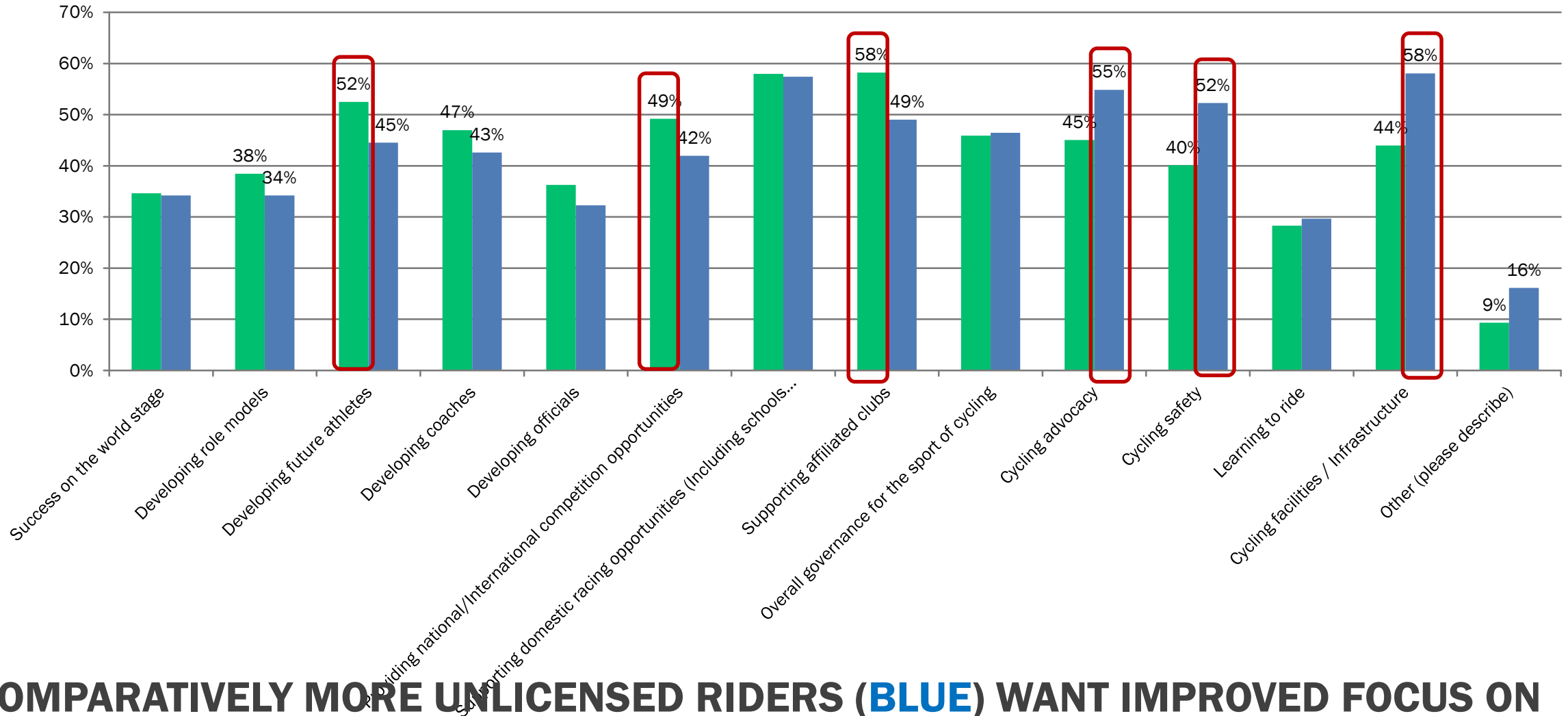
■ Learning to ride

AREAS OF POSITIVE IMPACT NOW – LICENSED VS UNLICENSED CYCLISTS



COMPARATIVELY MORE UNLICENSED RIDERS (BLUE) SEE POSITIVE IMPACTS AROUND SAFETY (6%), CLUB SUPPORT (6%) AND NATIONAL COMPETITION OPPORTUNITIES (6%)

AREAS TO IMPROVE IMPACT – LICENSED VS UNLICENSED CYCLISTS



COMPARATIVELY MORE UNLICENSED RIDERS (BLUE) WANT IMPROVED FOCUS ON ADVOCACY (10%), SAFETY (12%) AND FACILITIES (14%)

END

