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COMMUNITY SPORT VOP PROGRAMME

GLIDING RESULTS



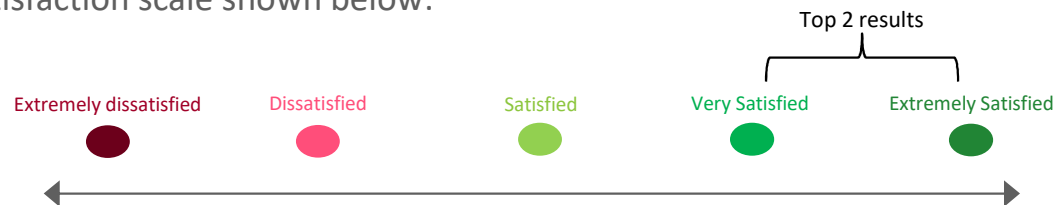
MAY 2017

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INTRODUCTION

- This report looks at the 2016/2017 results for Gliding New Zealand to understand the club experience of their members. For more information about the background and objectives of the VOP Programme and this research please refer to the 'Background, Objectives and Approach' section.
- All members of affiliated Gliding New Zealand clubs had the opportunity to participate, with adults aged 16+ completing the questionnaire themselves, and parents/caregivers completing the questionnaire for children under the age of 16, on behalf of their child.
- Throughout the survey for questions regarding a member's level of satisfaction we use the positively skewed satisfaction scale shown below:



- When we report the results for the percentage that are *satisfied* we are referring to the 'top 2' results i.e. the percentage that are either 'very satisfied' or 'extremely satisfied'.
- We use positively skewed scales because this means the neutral ratings are divided between dissatisfaction and satisfaction (as opposed to a neutral mid point in a balanced scale). It also gives the opportunity for some of the very satisfied to be 'delighted'. This results in more variation/ greater discrimination compared to a balanced scale. In addition, a neutral option offers people an option not to think. If this is really true, then they have the 'don't know/ can't say' option to select.
- Finally, in a competitive world today, is good...good enough? Good (or just satisfied) does not necessarily build strong relationships. We want members to rate their experience more than just satisfied, so they are real advocates and positively endorse their club and sport.

EXECUTIVE SUMMARY

- Overall, the key metrics show that gliding clubs are performing well, with higher scores in five of the six key metrics when compared to the average score for all sports 2016/17. Three in five (60%) indicate that they are satisfied (very or extremely satisfied) and the NPS score is +50. The likelihood to re-join next season is particularly high (88%), while there is a good proportion who indicate they are satisfied with the joining process (62%).
- Four in five (81%) indicate the opportunities, services and benefits that they receive from their club make it well worth the money that they pay.
- One in ten (11%) are new members (less than one year). Those from Wellington Gliding Club (22%) are significantly more likely to be new members.
- Over the length of membership each of the key metrics decline, before increasing. Members of 6-10 years are significantly more likely to re-join their club next season (98%).
- Half of the pilots (53%) have been members of another club. Of those who have changed club, the main reason for change is location i.e. they moved (56%), followed by better opportunities to fulfil their potential (5%) and better access to club gliders and launch facilities (3%).
- When compared to the average for all sports 2016/17, pilots are *significantly more* likely to be satisfied (very or extremely satisfied) with both the *quality of the coaches or instructors* (71% cf. 59%) and *allowing me to fulfil my potential* (65% cf. 59%).
- Of those who would want improvement, one in five (21%) indicated they would want to see improvement in *club gliders and launch facilities* and *member development programmes*.
- *Fostering a sense of pride* and *providing a good social environment* are two areas of lower performance and relatively high importance, that need addressing to drive an increase in the NPS score.
- Verbatim comments in the survey indicate that there may be an issue with senior gliders belonging to 'cliques' at their clubs, particularly older males.

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 included about a sub-group), it may safely be assumed that differences from the average/ total are not statistically significant or they are not pertinent.

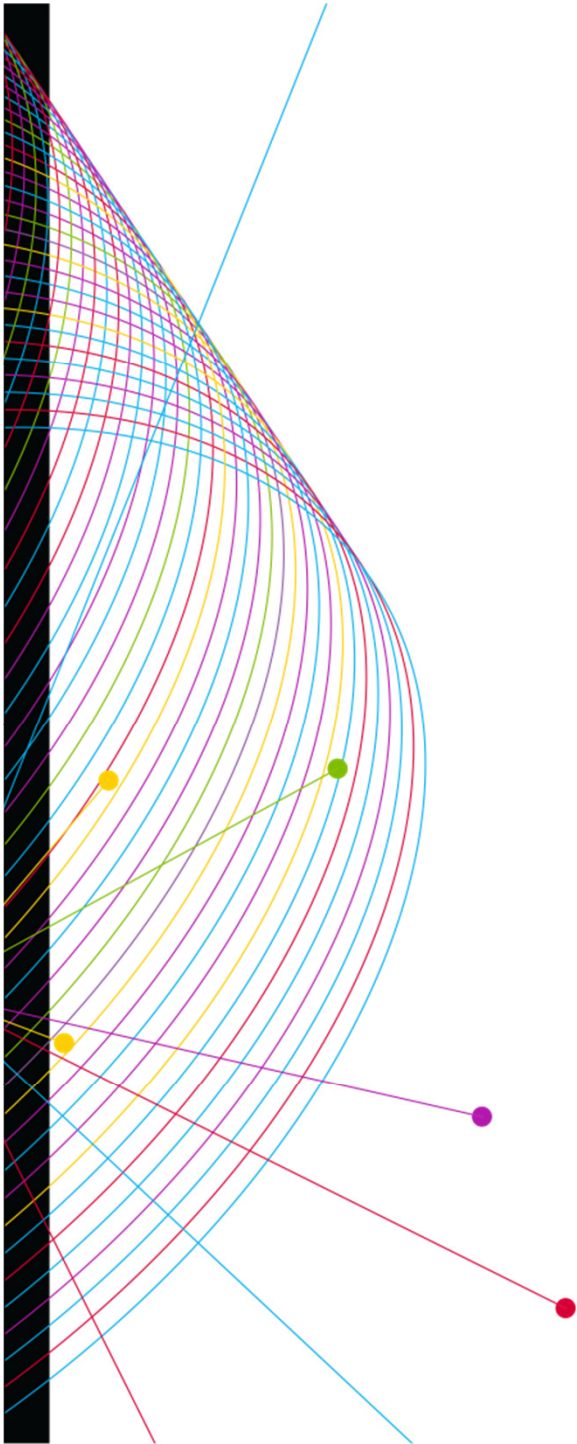
- Statistically significant differences in this report are significant at the 95% confidence level. That is, we are 95% confident results are not just normal expected variances that result from talking to a different sample within the same population (the smaller the sample size the higher the expected variance between samples).
- Statistical significance is reported in the following ways:
 - ▼ or - The Gliding result/subgroup result is significantly lower than the All Sports 2016/17 or subgroup result for the current year
 - ▲ or - The Gliding result/subgroup result is significantly higher than the All Sports 2016/17 or subgroup result for the current year

Total

Where 'All Sports 2016/17' is used this refers to the results for the total sample in 2016/17 i.e. an average of the sports that participated in winter 2016 and summer 2017.

Rounding of Figures

Due to rounding the net figures provided (% very satisfied + extremely satisfied) may differ to the numbers shown on the charts.



KEY METRIC RESULTS

OVERALL HOW ARE GLIDING CLUBS PERFORMING?

Three in five gliders (60%) are satisfied (very/extremely satisfied) with their Gliding club. The NPS score is significantly higher for Gliding clubs when compared to the average for all sports 2016/17.



Base: Respondents who are members or fly casually at a club (Excluding Don't know/not applicable) (Total Gliding n=354, All Sports 2016/17 n=24784)

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

Base: Respondents who are members or fly casually at a club (Excluding Don't know/not applicable) (Total Gliding n=358, All Sports 2016/17 n=24801)

Q7. Imagine someone is interested in flying or participating in gliding. If they asked you, how likely are you to recommend your/ your child's gliding club 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 All Sports 2016/17

OVERALL HOW ARE GLIDING CLUBS PERFORMING?

Gliding clubs rate significantly higher than average for all sports 2016/17 for value for money and likelihood to rejoin. Three in five are satisfied with the joining process (62%).

VALUE FOR MONEY

(Q11: % agree or strongly agree)



81% AGREE MEMBERSHIP IS WELL WORTH THE MONEY

TOTAL GLIDING	ALL SPORTS 2016/17
81%▲	74%
88%▲	82%
62%	53%

LIKELIHOOD TO RE-JOIN

(Q9: % quite likely or very likely)



88% ARE LIKELY TO RE-JOIN THEIR CURRENT CLUB NEXT SEASON

JOINING PROCESS

(Q20: % very satisfied or extremely satisfied – average of 4 attributes)



62% ARE SATISFIED WITH THE JOINING PROCESS

▲▼ Significantly higher/lower than All Sports 2016/17

Base: Respondents who are members or fly casually (Excluding Don't know/not applicable) (Total Gliding n=354, All Sports 2016/17 n=24466)

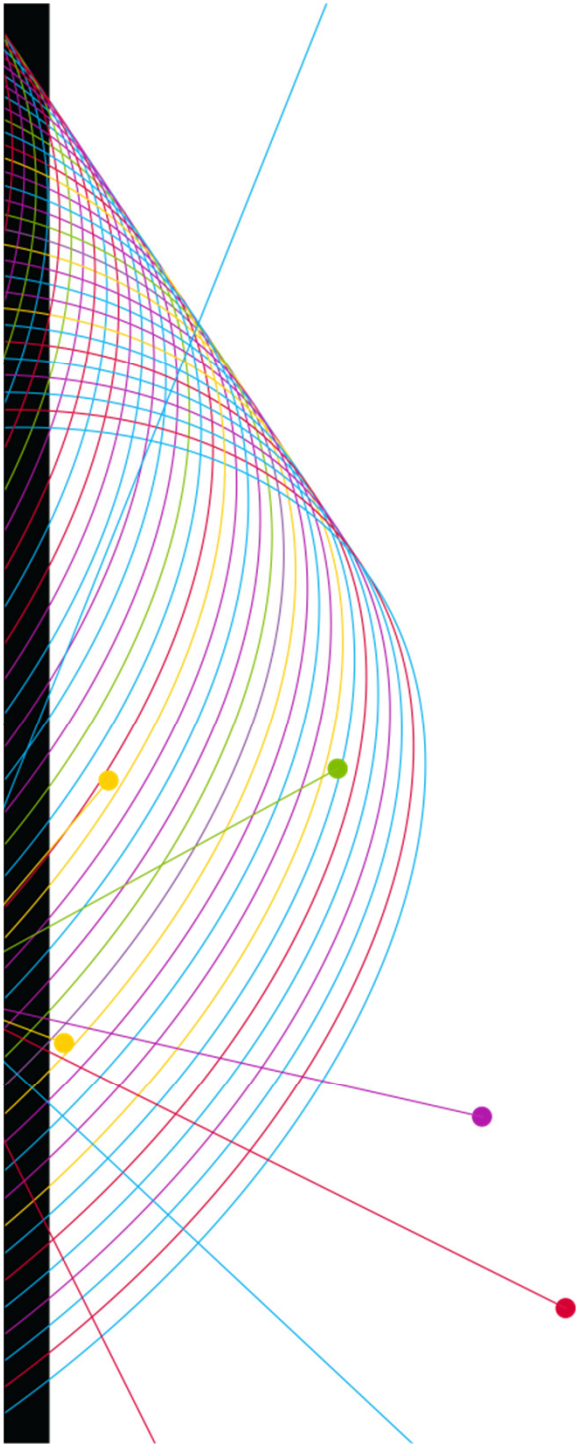
Q11. To what extent do you agree or disagree with the following... The opportunities, services and benefits that I/ your child receive/ receives from my/ their gliding club make it well worth the money I/ you or they pay?

Base: Respondents who are members (Excluding Don't know/not applicable) (Total Gliding n=351, All Sports 2016/17 n=24171)

Q9. How likely are/ is you/ your child to glide for or rejoin your/their gliding club next season?

Base: Respondents who have been a member for less than one year (Excluding Don't know/not applicable)

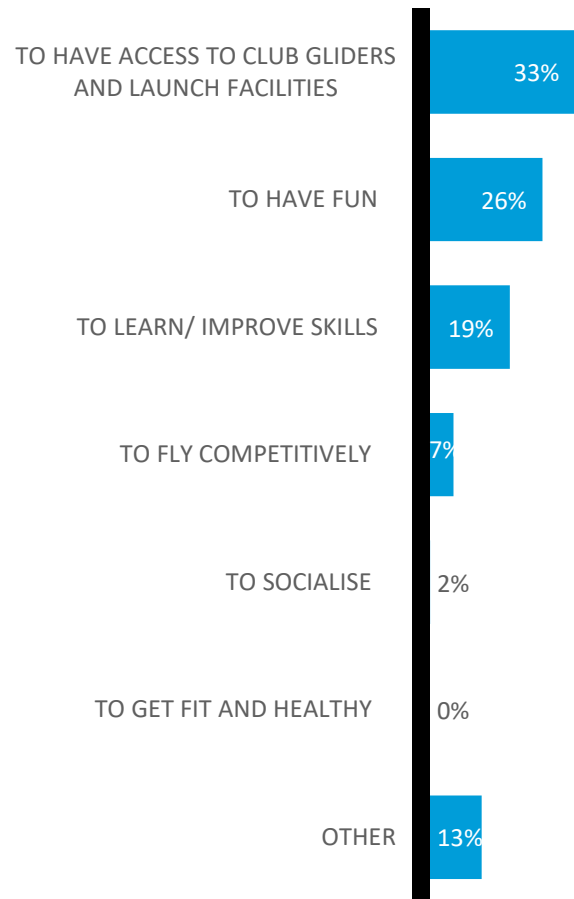
Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their gliding club. How satisfied are you with your/ their gliding club on the following...



MAIN FINDINGS

WHAT IS THE MAIN REASON TO BELONG TO A GLIDING CLUB?

For a third of respondents (33%), the main reason for belonging to a Gliding club is to *have access to club gliders and launch facilities*. More than one in four (26%) belong to *have fun*, whilst one if five (19%) belong to *learn/improve skills*.

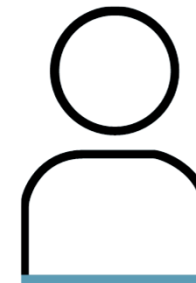


● TOTAL GLIDING (n=360)

OTHER REASONS TO BELONG TO A CLUB INCLUDE:

“To improve skill, competition, socialising & launch facilities”
(55-59 years)

“Access to launch facilities and improve skills (could include becoming an instructor)”
(45-49 years)

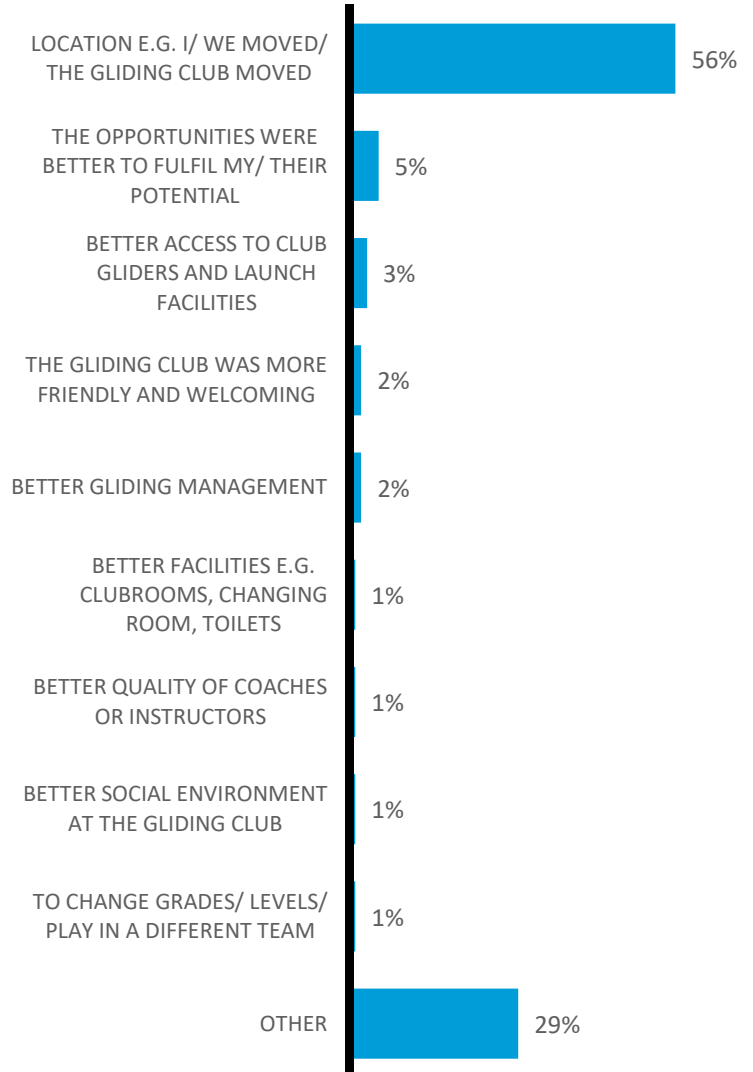
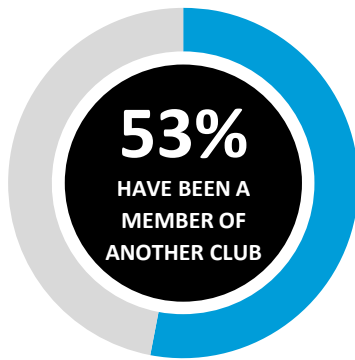


“The magic of soaring gliders”
(65+ years)

“To fly gliders and tow planes and teach others to fly gliders”
(65+ years)

“To generally enjoy aviation and provide towing services.”
(60-64 years)

OVER HALF HAVE BEEN A MEMBER OF ANOTHER CLUB



Those who have been a member of another club are *significantly more* likely to be:

- Those who have complained in the last 3 months (68% cf. 53%)
- Those who are detractors (66%)
- Those of flying membership level (56%)

Base: Respondents who are members (n=360)

Q31. Have/ Has you/ your child ever been a member of another gliding club?

Base: Respondents who are members(excluding don't know or can't remember) (n=190)

Q32. What is the main reason you/ your child changed gliding clubs?

WILL THEY REJOIN?

THE MAJORITY OF PILOTS ARE LIKELY TO REJOIN THEIR CLUB NEXT YEAR

When it comes to likelihood of rejoining, nine in ten (88%) indicate that they are likely to rejoin their club next season. This is significantly higher than the average for all sports 2016/17 (82%).

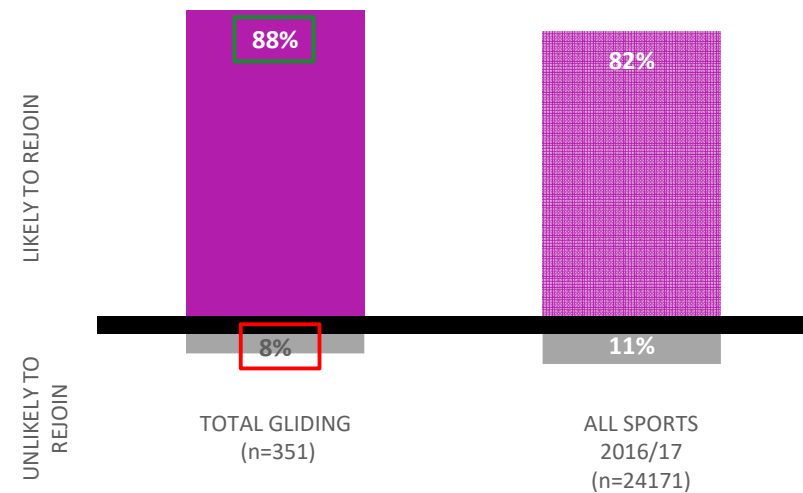
SUB-GROUP DIFFERENCES

Those *significantly more likely to rejoin* their current club are:

- Those who are members and currently flying (90% cf. 88%)
- Members for 6-10 years (98%)
- Those who fly two or three times a month (93%)
- Satisfied (Very/Extremely satisfied) (92%)
- Those who have not made a complaint in the last 3 months (91%)

Those *significantly more likely* to indicate they are **unlikely** to rejoin their club:

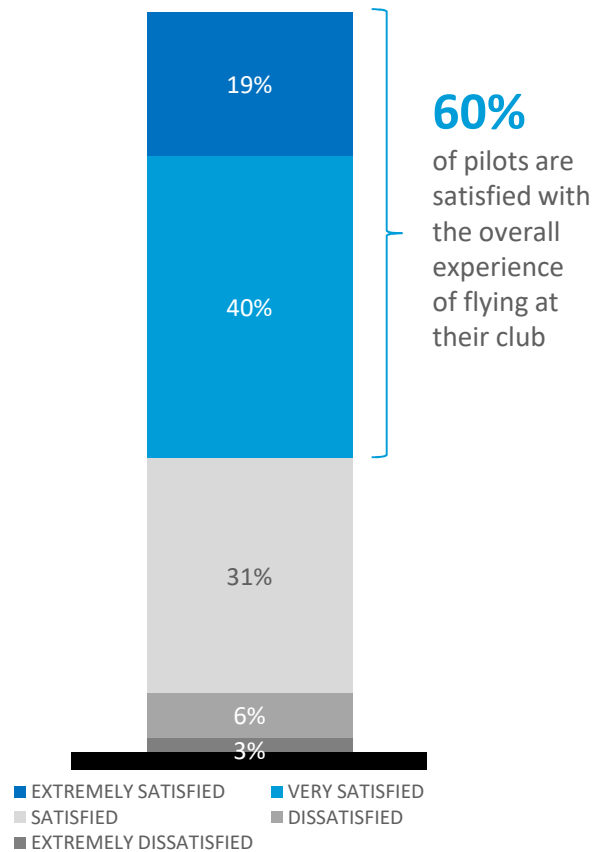
- Those who are members but not currently flying (19% cf. 8%)
- Members for more than 10 years (12%)
- Those who fly once a month (21%)
- Those from the Canterbury Gliding Club – CTY (18%)



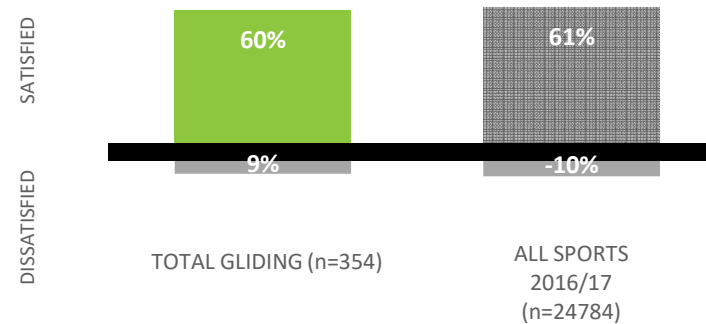
* Small base sizes

Legend: / Significantly higher/lower than All sports 2016/17

HOW SATISFIED ARE PILOTS?



60% of pilots are satisfied with the overall experience of gliding at their club (rated very satisfied or extremely satisfied).



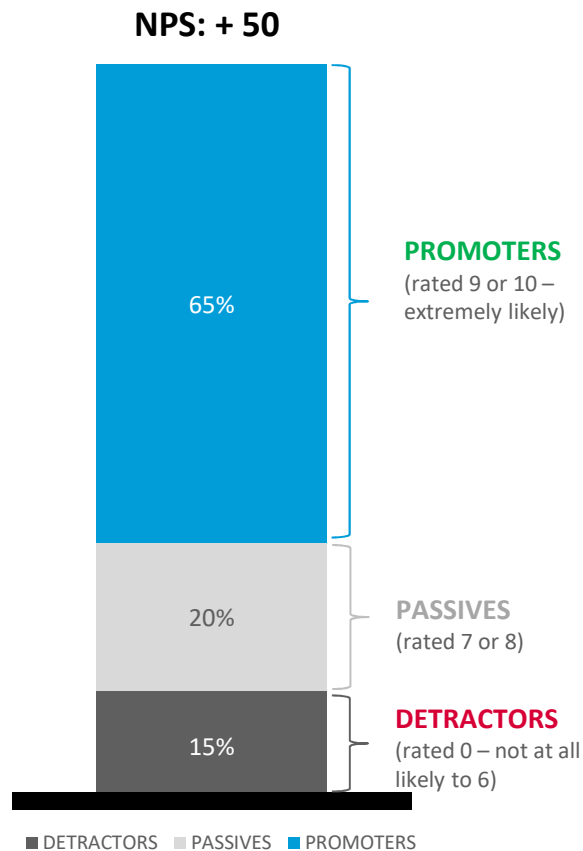
SUB-GROUP DIFFERENCES

Those *significantly more* likely to be satisfied (extremely satisfied/very satisfied) with their gliding club are:

- Those who reside in Wellington/Wairarapa (75% cf. 58%)
- Those who are very likely to rejoin next season (67%)
- Those who have not complained in the last 3 months (63%)

Base: Respondents who are members or fly casually at a club (Excluding Don't know/not applicable) (n=354)
 Q6. To what extent are you satisfied or dissatisfied with the/ your child's overall experience of gliding at your/ their gliding club?

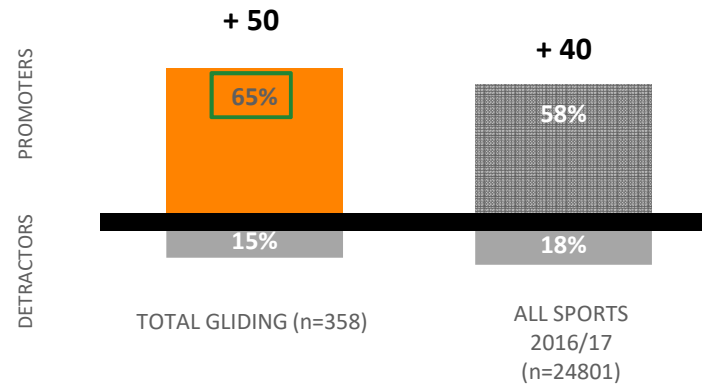
NET PROMOTER SCORE (NPS): HOW LIKELY ARE PILOTS TO RECOMMEND THEIR CLUB?



NPS = % PROMOTERS - % DETRACTORS

Base: Respondents who are members or fly casually at a club (Excluding Don't know/not applicable) (n=358)
 Q7. Imagine someone is interested in flying or participating in gliding. If they asked you, how likely are you to recommend your/ your child's gliding club to them, using a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely?

65% of pilots are highly likely to recommend their gliding club to someone interested in participating in gliding (rated 9 or 10, with 10 being extremely likely).



SUB-GROUP DIFFERENCES

Those significantly more likely to be promoters (rated 9 or 10) are:

- Those who are extremely satisfied or very satisfied (84% cf. 65%) with their club
- Committee Members (81%)
- Those aged 65+ (74%)
- Those who are very likely to re-join their club next season (71%)
- Members of tenure 10 years+ (70%)
- Those who have not complained in the last 3 months (68%)

WHAT MEMBERS SAY THEY LOVE ABOUT THEIR CLUB

'Good fleet, good social atmosphere, good facilities, convenient location. Fosters skill and distance flying, proximity to Coast Run, favourable local conditions.'

(40-44 years)

'Many enthusiastic and highly competent members who contribute wholeheartedly to the club and development of other members in the trainee category. Great member participation. Reliable people, planes, ground equipment and a great soaring location.'

(65+ years)

'The quality of the aircraft, the geographical environment, the fellow members & the facilities on the airfield.'

(65+ years)

'Members are friendly and passionate about gliding as a sport and recreational activity.'

(40-44 years)

'A great club which has just recently relocated to another site. A great club atmosphere with everyone pitching in to get the important work done. High quality of training gliders, as well as new winch launch capability. More experienced pilots willing to share their time and experiences with other lesser experienced trainees.'

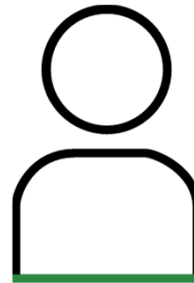
(35-39 years)

'Very good site, owned by the club. Great starting point for good cross country flights. Excellent Club gliders, tug and winches. Good committee members and officers trying their best ,under trying conditions. Good camaraderie, helping each other.'

(65+ years)

'I was surprised at the fabulous social life of the club. Not only is training and flying well organised (co-operatively, collaboratively and willingly by volunteers like any great club) but the people are really friendly, welcoming, and know how to have a good time. The social atmosphere is what makes the club run so well, including the flying. A real pitch in and help attitude, plus developing real friendships - all of which motivates to better involvement.'

(55-59 years)



WHAT MEMBERS SAY NEEDS TO IMPROVE

'The club needs to be more welcoming. Too many individuals doing their own thing. Too many personality clashes (unresolved).'

(65+ Years)

'The gliding club is just an eftpos machine. There is no club spirit and no club feel.'

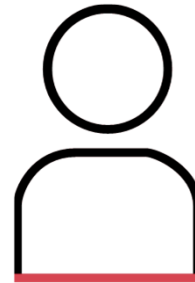
(40-44 Years)

'A culture change would be required. The "mood" of the club is unfriendly, comprised of cliques and old-boys' groups, and down right opposed to new-comers.'

(60-64 Years)

'Organisation needs improvement when it comes to booking, for example if someone has booked a time to fly sometimes a trial flight gets priority and you end up waiting 1-2 hours for a flight you already booked.'

(25-29 Years)



'I have been flying overseas in Europe, clubs have much bigger/better fleets. Problem, with an expensive membership (\$700) is I still have to pay for all the flight time. Taking a glider for 2 hours would cost me \$250, it's ridiculously expensive. I could pay \$2,100 per year to not pay for gliding hire time, but I would still need to pay \$50 to get the glider all day and \$50ish for an aero tow launch. In comparison to my club back in Europe, I would generally pay between \$20 for a launch and no fees to go cross country for a couple of hours. Bottom line, I don't fly much here because the fleet is limited and prices are crazy.'

(30-34 Years)

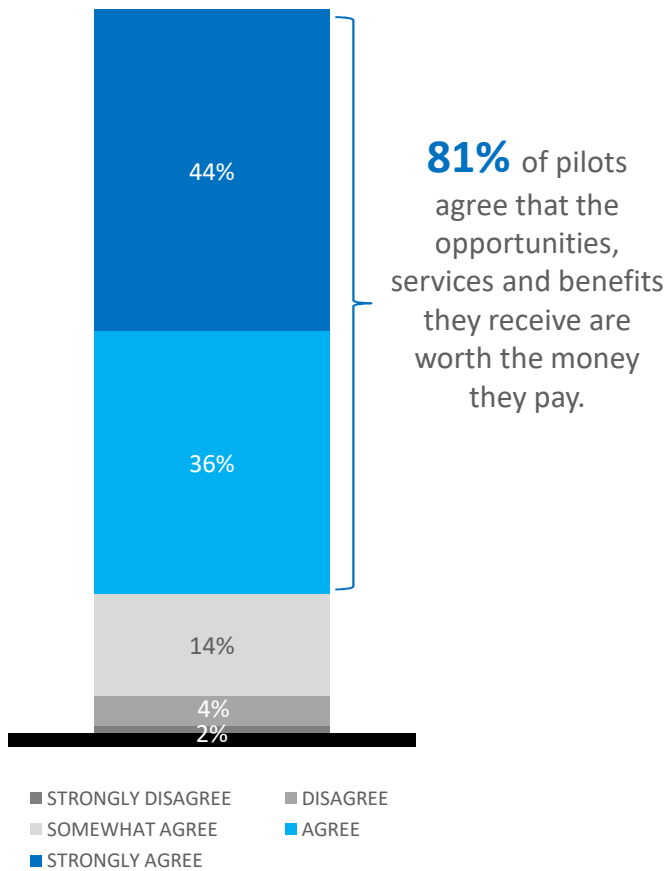
'Training leaves a lot to be desired, particularly a lack of continuity due to too many different instructors. Poor value for time - you can spend all day on the field and only get a small amount of time from instructors. Too much emphasis on recruiting new members and not enough on retention. Would be better to recruit fewer, but higher quality members - i.e. people who have the time, dedication and patience to commit to what can be a frustrating learning experience.'

(40-44 Years)

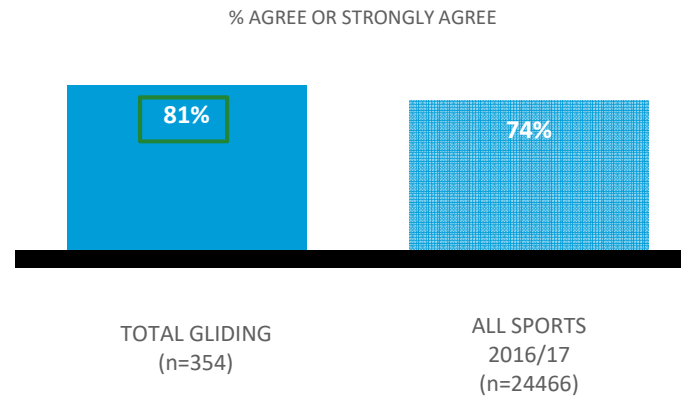
Base: Respondents who gave an NPS score of 0 to 6 (n=53)

Q8c. What would need to improve at you/ your child's club to improve your rating? Note: for the full list of verbatim comments please refer to the excel file

PERCEIVED VALUE FOR MONEY



Nearly **four in five** (81%) pilots perceive that they receive value for money from their gliding club.



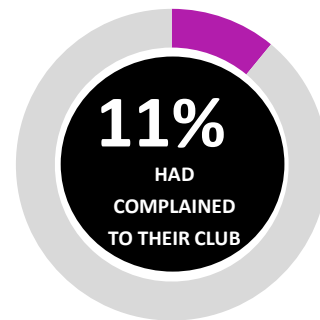
SUB-GROUP DIFFERENCES:

Those *significantly more* likely to perceive value for money (agree/strongly agree) are:

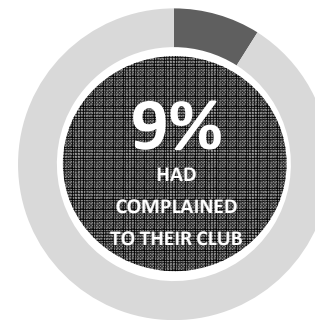
- Those who are very/extremely satisfied with their club (94% cf. 81%)
- Those who reside in Waikato (93%)
- Committee members at their club (93%)
- Those who are very likely to re-join their club next season (89%)

IN THE LAST THREE MONTHS...

A slightly higher proportion of pilots complained to their club in the last three months when compared to the average for all sports 2016/17 (11% cf. 9%).



TOTAL GLIDING
(n=361)



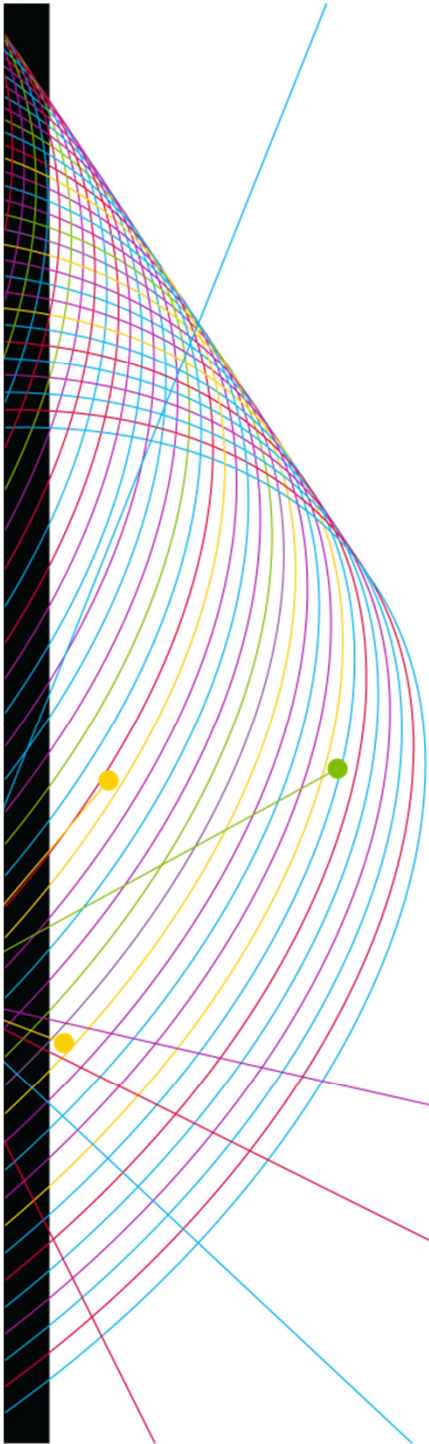
ALL SPORTS
2016/17
(n=24848)

SUB-GROUP DIFFERENCES

Those *significantly more* likely to have complained to their club in the last three months are:

- Those who are dissatisfied with their club (48% cf. 11%)
- Those who fly six times or more a month (19%)
- Those who reside in Auckland (18%)
- Those aged 55-64 (17%)

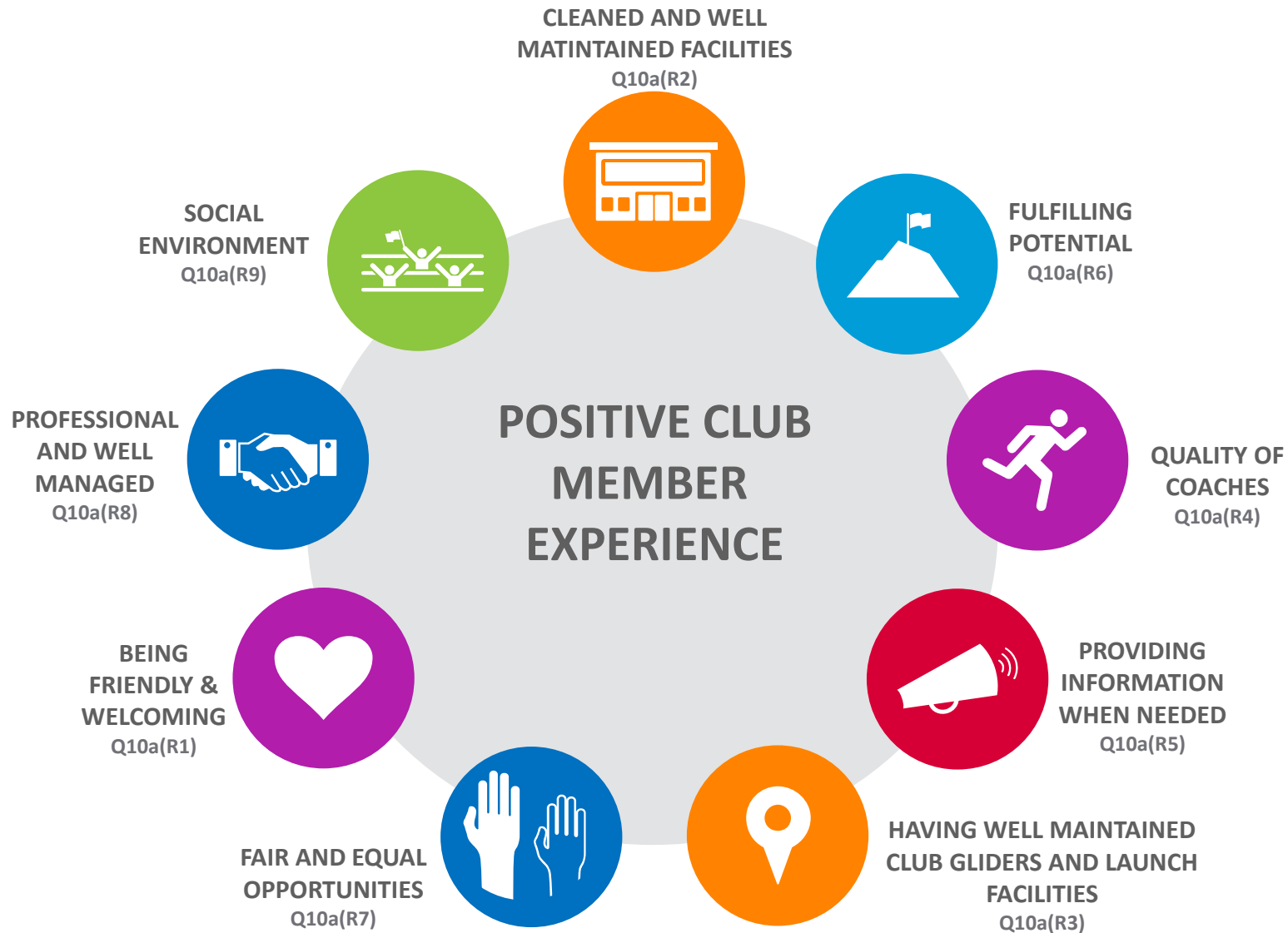
▲▼ Significantly higher/lower than total



WHAT IS CAUSING THESE RATINGS?

DRIVERS OF THE CLUB EXPERIENCE

The qualitative stage, undertaken as part of the development of the VOP questionnaire, identified seven factors that influence club experience. After the initial pilot of the VOP questionnaire this was expanded to nine core factors. The question numbers that relate to each factor are shown below.

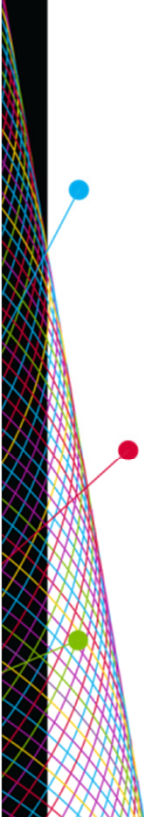


DRIVERS OF THE CLUB EXPERIENCE CTD

As well as the nine 'core' drivers of the club experience, based on the pilot results and in consultation with National Sporting Organisations (NSOs) the VOP survey also covers a number of secondary factors. These are shown below with the associated question number.

- Value for money (Q11)
- Encourages good sportsmanship and fair play (Q10b-R1)
- The ease of accessing club gliders and launch facilities (Q10b-R2)
- Fostering a sense of pride in the club (Q10b-R3)
- Engaging with the local community (Q10b-R4)
- Being responsive to needs and requirements (Q10b-R5)
- Having qualified officials available for competition (Q10b-R6)
- Providing a safe environment for adults and children (Q10b-R7)
- Making aware of development occurring across New Zealand in terms of training, equipment, new programmes, coaching and officiating, club and event management (Q10b-R8)
- Providing information and opportunities for coach development (Q10b-R9)
- Providing information about junior programmes (Q10b-R11)
- Making aware of the benefits provided as a member of an NSO. (Q10b-R13)

In addition, individual NSOs had the opportunity to add other factors considered important or topical for their sport, if required.



EXPLANATION OF REGRESSION

- Regression is a statistical process for estimating the relationship between a dependent variable and one or more independent variables (or 'drivers'). It helps us to understand the importance or impact of a 'driver' by measuring its contribution to explaining variance in the dependent variable. It assigns a score ranging from zero to one - the higher the score, then the more important/ impact the attribute has. We have used a regression approach called Modified Kruskal, which addresses any multi-collinearity issues.
- For the VOP project this year we have focused on the regression for recommendation (so recommendation is the dependent variable) to understand what is driving the NPS score.
- We have created a regression model for each individual sport based only on the data for that sport and the factors that were answered by that sport's respondents (including any optional or additional factors). (Note: previously we created one overall model that used the data from all sports but only included the core factors of the club experience answered by all sports).
- The following chart shows the impact of the drivers on recommendation on the vertical axis (from the regression model), and how members are rating their satisfaction with their club on each of these drivers on the horizontal axis. This allows us to see what is more important but rated lower and that is where clubs should focus to improve recommendation and NPS.

WHAT IS DRIVING THE NPS RESULTS?

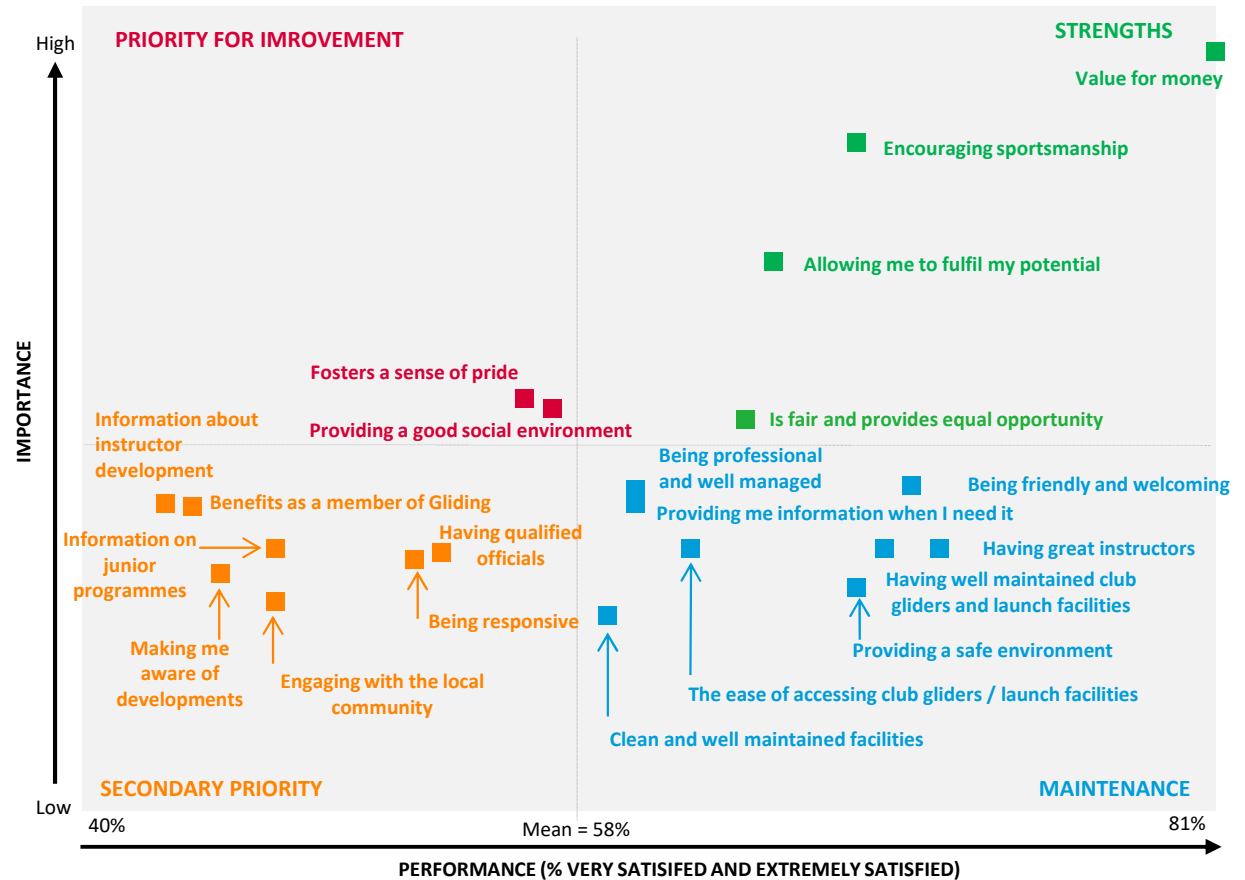
While all the attributes are important, the top three drivers of recommendation of a club are:

1. Value for money
2. Encouraging good sportsmanship and fair play
3. Allowing me to fulfil my potential

The factors that should be the focus of improvement are those in the priority for improvement quadrant – *fostering a sense of pride in our club and providing a good social environment.*

Encouraging sportsmanship, allowing me to fulfill my potential and value for money are considered strengths, signifying higher performance in a higher importance area.

The majority of attributes are considered secondary priorities, (signifying lower performance in a lower importance area) or are in the maintenance quadrant (signifying higher performance in a lower importance area).

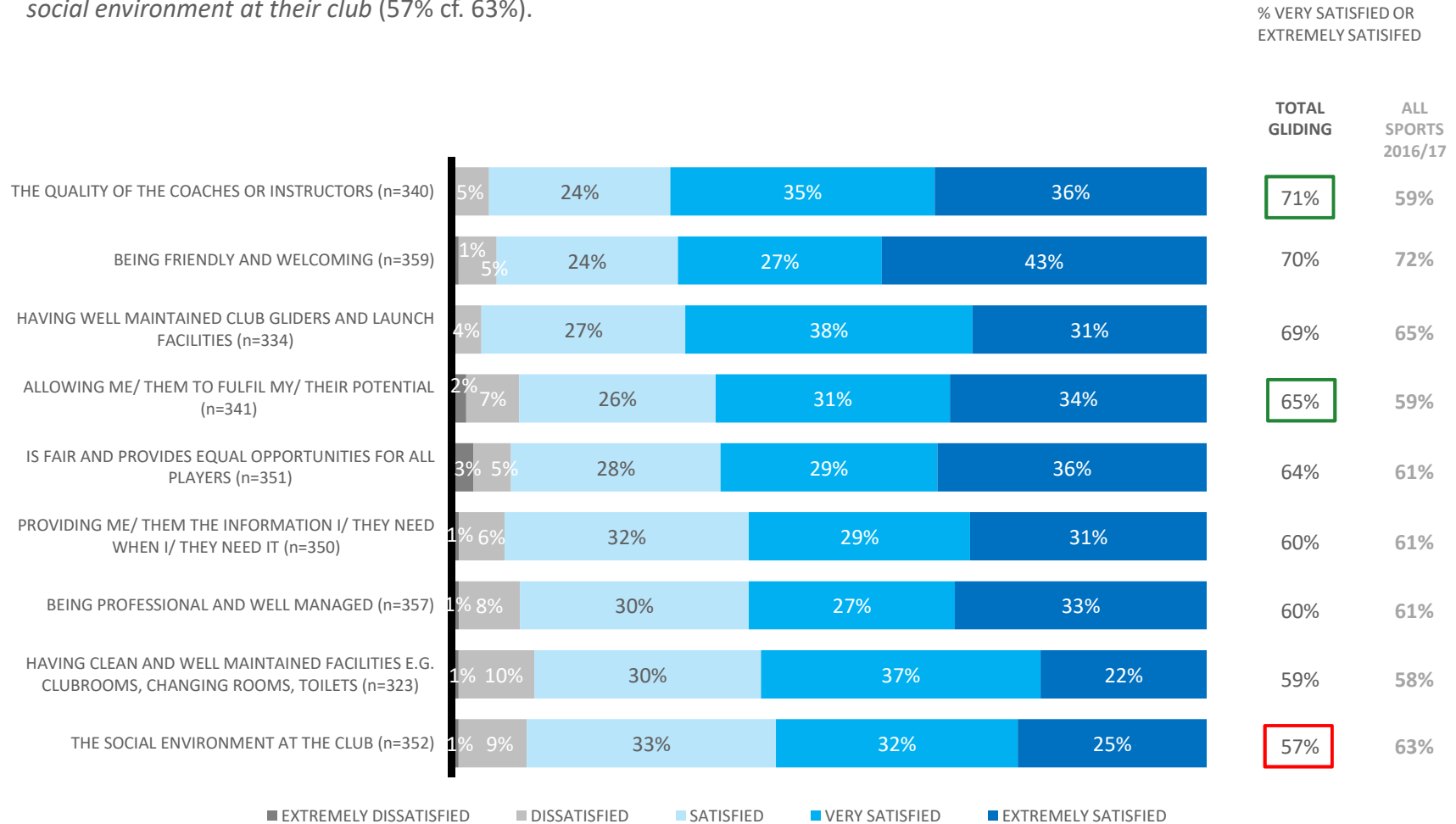


Base: Respondents who are members or fly casually at a gliding club (Excluding Don't know/can't say)

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

SATISFACTION ACROSS FACTORS

When compared with the average for all sports in 2016/17, pilots show similar levels of satisfaction for the majority of factors. Pilots, however, are *significantly more* likely to be satisfied (very or extremely satisfied) with both the *quality of the coaches or instructors* (71% cf. 59%) and *allowing me to fulfil my potential* (65% cf. 59%). However, pilots are *significantly less* likely to be satisfied with *the social environment at their club* (57% cf. 63%).

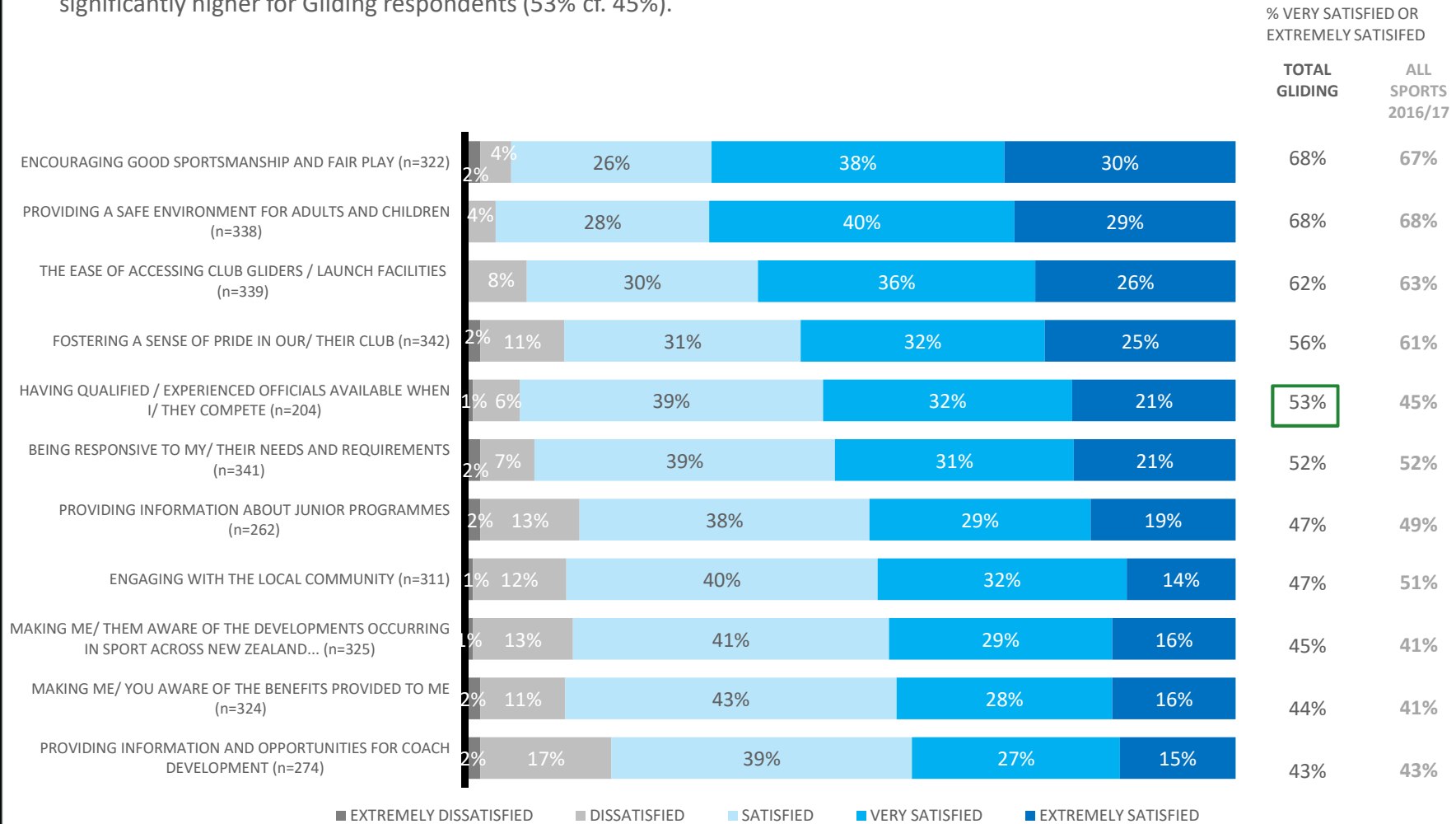


Base: Respondents who are members or fly casually (Excluding Don't know/not applicable)
 Q10a. How would you/ your child rate your/ their overall satisfaction with your/ their gliding club on each of the following...

71% / 57% Significantly higher/lower than All Sports 2016/17

SATISFACTION ACROSS FACTORS

The trend for similar levels of satisfaction continues with *having qualified/experienced officials available when competing* rated significantly higher for Gliding respondents (53% cf. 45%).

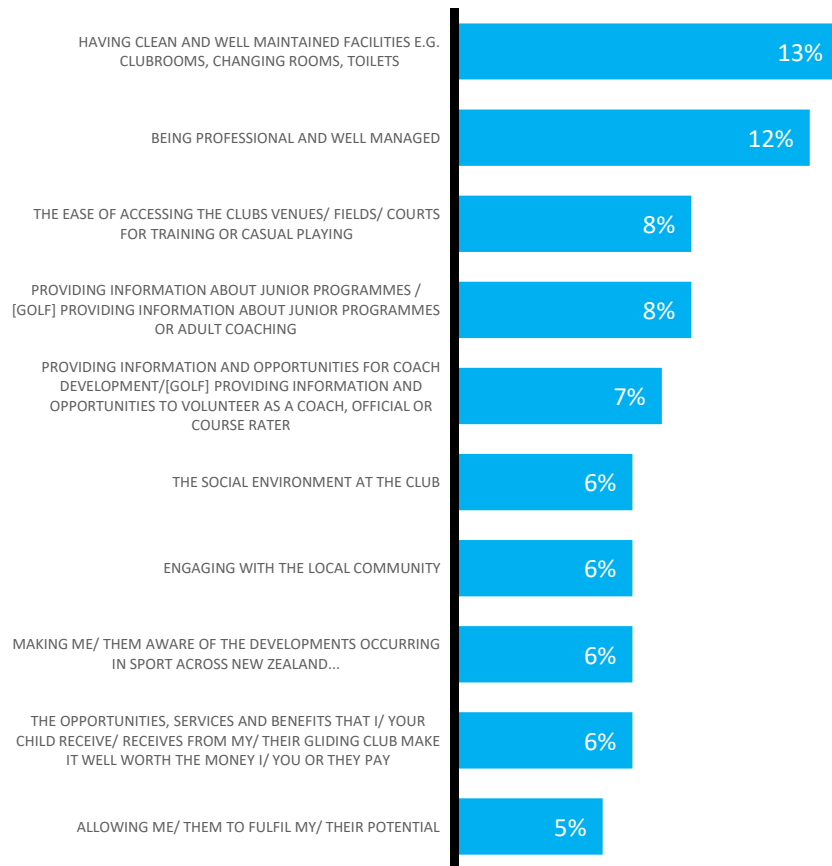


Base: Respondents who are members or fly casually (Excluding Don't know/not applicable)
 Q10b. How would you rate your/ your child's overall satisfaction with your/ their gliding club on each of the following...

Significantly higher/lower than All Sports 2016/17

HOW CAN CLUBS IMPROVE MEMBERS EXPERIENCE

Having clean and well maintained facilities (13%) and being professional and well managed (12%) are the most commonly mentioned areas within which clubs can improve their members' experience.



'More keen cross country flying members would be great and then we can organise more mid week flying.'
(60-64 Years)

'The terminal needs a little maintenance. Carpet, chairs, projector, etc.'
(50-54 Years)

'Improvement in communications with members. One third of club members reside overseas and receive little or no information on club activities. Many who do reside in New Zealand are still ignored when it comes to gliders being taken away from the airfield.'
(65+ Years)

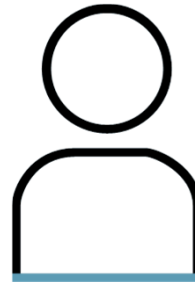
Base: Respondents who are dissatisfied/extremely dissatisfied or disagree/strongly disagree (n=145)
Q12a. Thinking about what you rated lower in previous questions, please select which aspect of your/ your child's gliding club that you/ they are least satisfied with?

WHAT NEEDS TO IMPROVE FOR LOWER RATED ASPECTS

'Removing accumulated old/disused gear, cleaning clubrooms and toilets (delegating) and improving culture of keeping equipment clean and caring for it.'
(50-54 Years)

'The club struggles to get skilled and willing people to administer the club. I am finding my administrative and instructional duties out weighing my personal flying pleasure. Gliding clubs absorb a lot of non flying time.'
(55-59 Years)

'More encouragement for youth members to join and participate in Youth Glide NZ activities.'
(20-24 Years)



'The club is generally poorly managed by well meaning enthusiasts and has engaged in some projects that will provide little long term benefits. The committee needs more formal structure and better cost benefit analysis in projects that it undertakes.'
(60-64 Years)

'The training scheme requires trainees to be pushy in order to progress, an attitude that is encouraged by the club. This is not a suitable learning environment for some personality types.'
(35-39 Years)

'To have greater information and subsequent action regarding the NCEA credits that they are entitled to. To forward any information regarding funds/scholarships that might be available to offset costs. (Not everyone is wealthy).'
(Parent)

FOCUS OF IMPROVEMENT

Members were asked what one aspect they would want to be improved, if membership fees were to increase to reflect any investment.

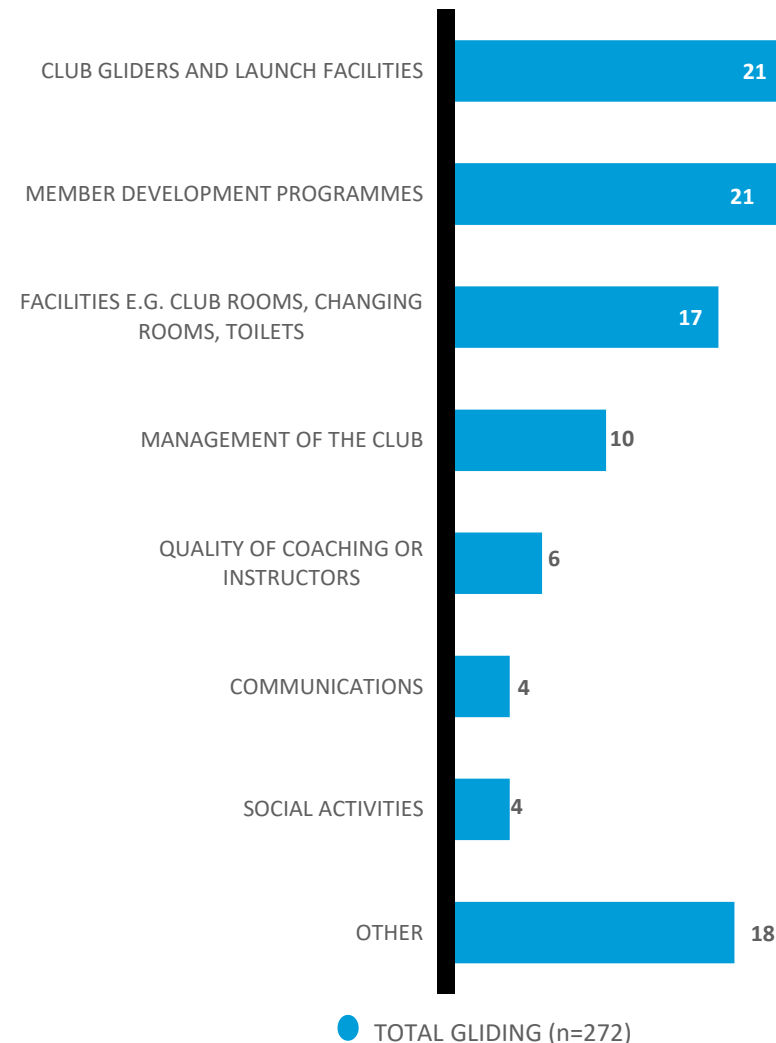


18% would not want anything improved if it meant their fees were increased.

Of those who would want improvement, **one in five** (21%) indicated they would want to see improvement in *club gliders and launch facilities* and *member development programmes*.

Of those who indicated 'Other' (18%), common themes include increasing membership / attracting new members and advertising/promotions to entice new members.

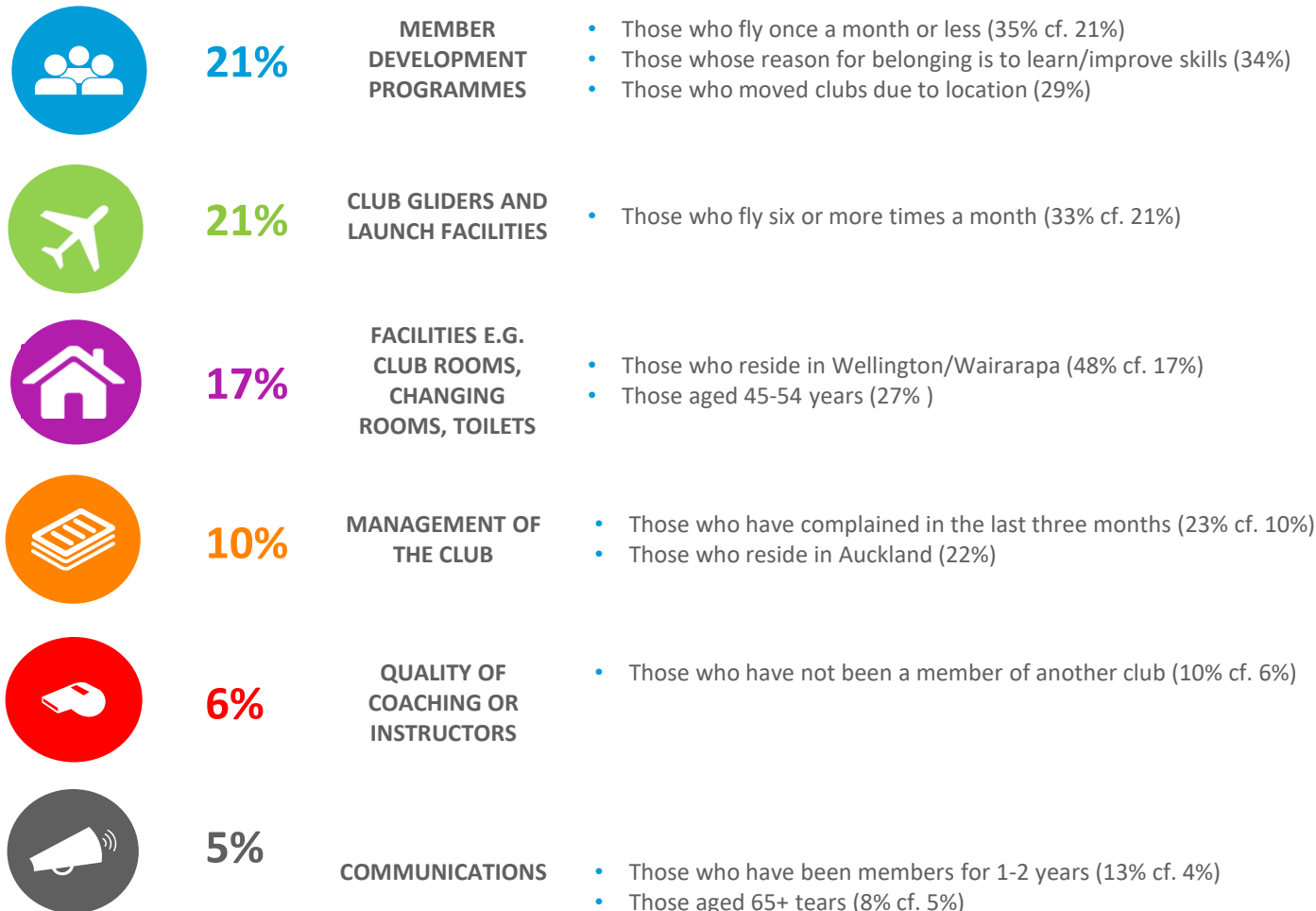
EVEN IF MEMBERSHIP FEES INCREASED, MEMBERS WOULD MOST WANT IMPROVEMENT IN... (%)



Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/I don't want to improve anything if it means my fees need to increase)
 Q14. Thinking about all the services and benefits of belonging to an gliding club...If your/ your child's gliding club was going to focus on improving one of the following aspects, and the membership fees increased to reflect this investment, which would be the one thing you/ your child would like them to improve?

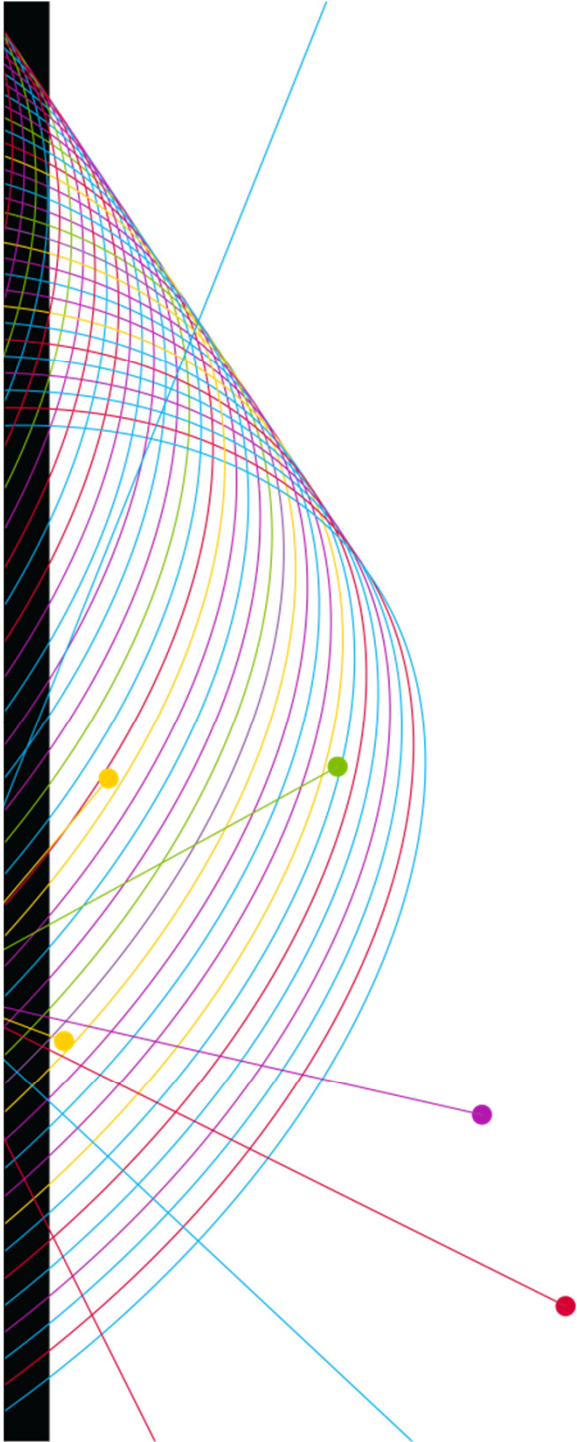
FOCUS OF IMPROVEMENT

SUB-GROUP DIFFERENCES



Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/not applicable) (n=5947)

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

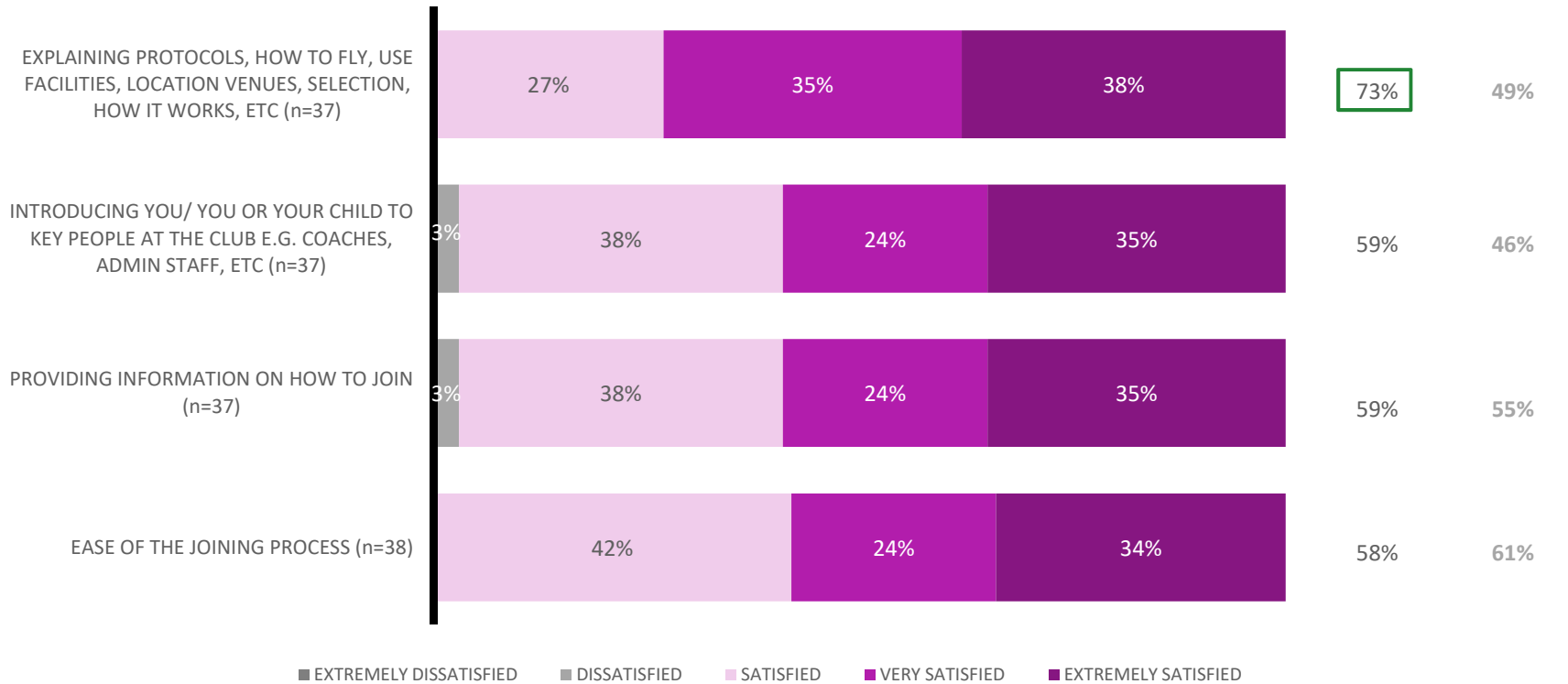


LENGTH OF MEMBERSHIP & THE JOINING PROCESS

HOW IS THE JOINING PROCESS RATED?



11% have been members of their current club for less than a year. Those who have joined a gliding club in the last 12 months are significantly more likely to be satisfied with the explanation of protocols to new joiners compared to the average for all sports 2016/17 (73% cf. 49%).



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Base: Respondents who are members

Q3. How long have/ has you/ your child been a member of gliding club?

Base: Respondents who have been a member for less than one year (Excluding Don't know/not applicable)

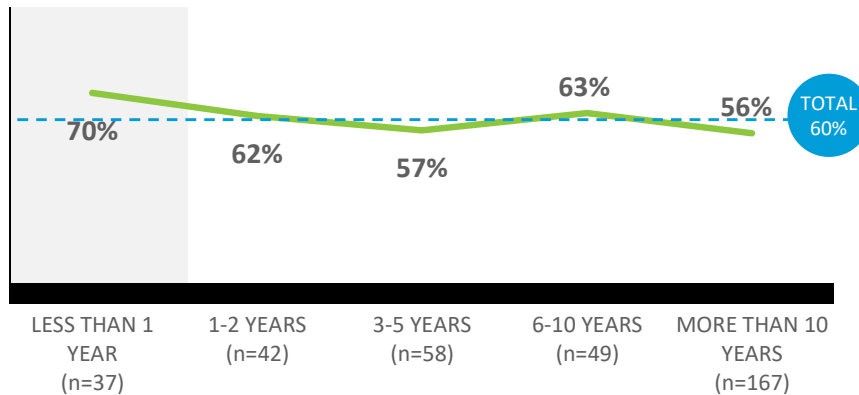
Q20. Thinking about the process you/ you and your child went through when you/ your child joined your/ their gliding club. How satisfied are you with your/ their gliding club on the following...

Significantly higher/lower than All Sports 2016/17

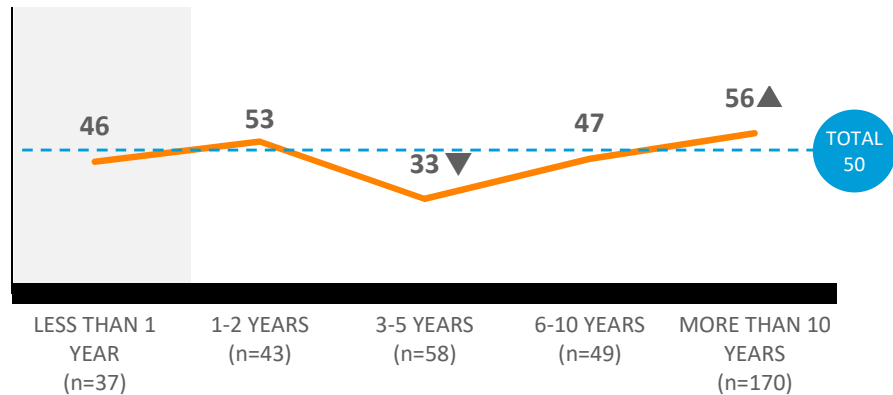
KEY METRICS BY LENGTH OF MEMBERSHIP

New members have higher ratings for *overall satisfaction* and *value for money* (although the differences are not significant). Members at the 3-5 year membership mark have lower ratings across each of the key metrics, with a significantly lower NPS score (33).

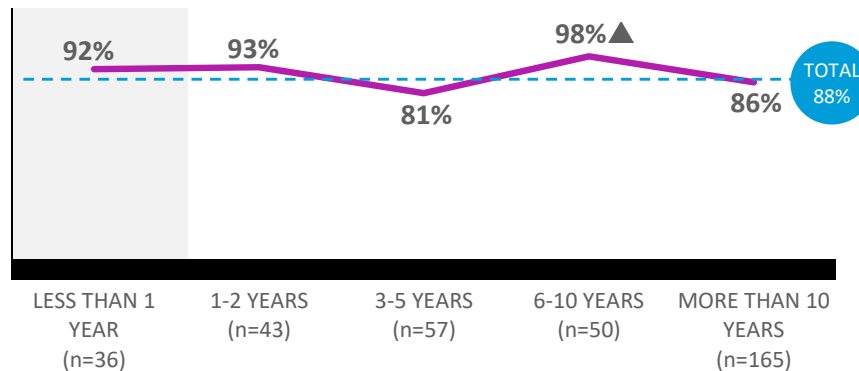
OVERALL SATISFACTION



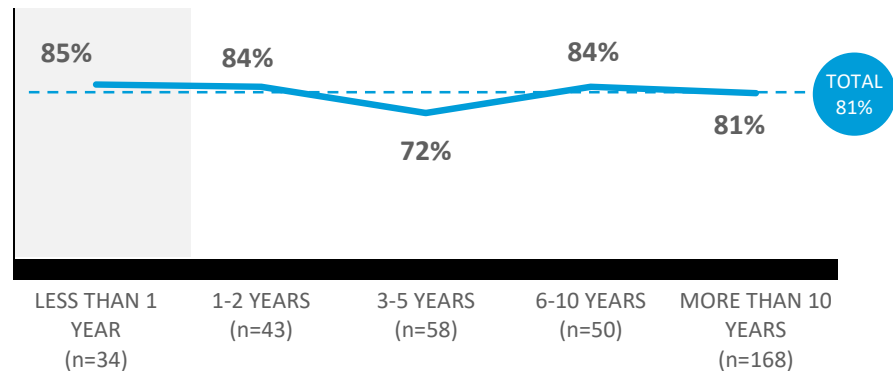
NET PROMOTER SCORE



LIKELIHOOD TO REJOIN



VALUE FOR MONEY



▲▼ Significantly higher/lower than total

Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/not applicable) (n=354)

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

Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/not applicable) (n=358)

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

Q9. How likely are/ is you/ your child to gliding for or rejoin gliding club next season?

Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/not applicable) (n=354)

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

LENGTH OF MEMBERSHIP

WHAT ARE THE DIFFERENCES BETWEEN MEMBERSHIP LENGTH...

The following groups are *significantly more* likely to be:

11%

NEW MEMBERS (LESS THAN 1 YEAR)

- Those whose main reason for belonging to a club is to *learn/improve skills* (23% cf. 11% total)
- Those from Wellington Gliding Club – WLN (22%)

12%

1-2 YEARS

- Those who indicate they are extremely satisfied with the overall experience at their club (22% cf. 12%)
- Those who hold the role of member only (14%)

16%

3-5 YEARS

- Those whose main reason for belonging to a club is to *learn/improve skills* (24% cf. 16% total)
- Those who hold the role of member only (19%)

14%

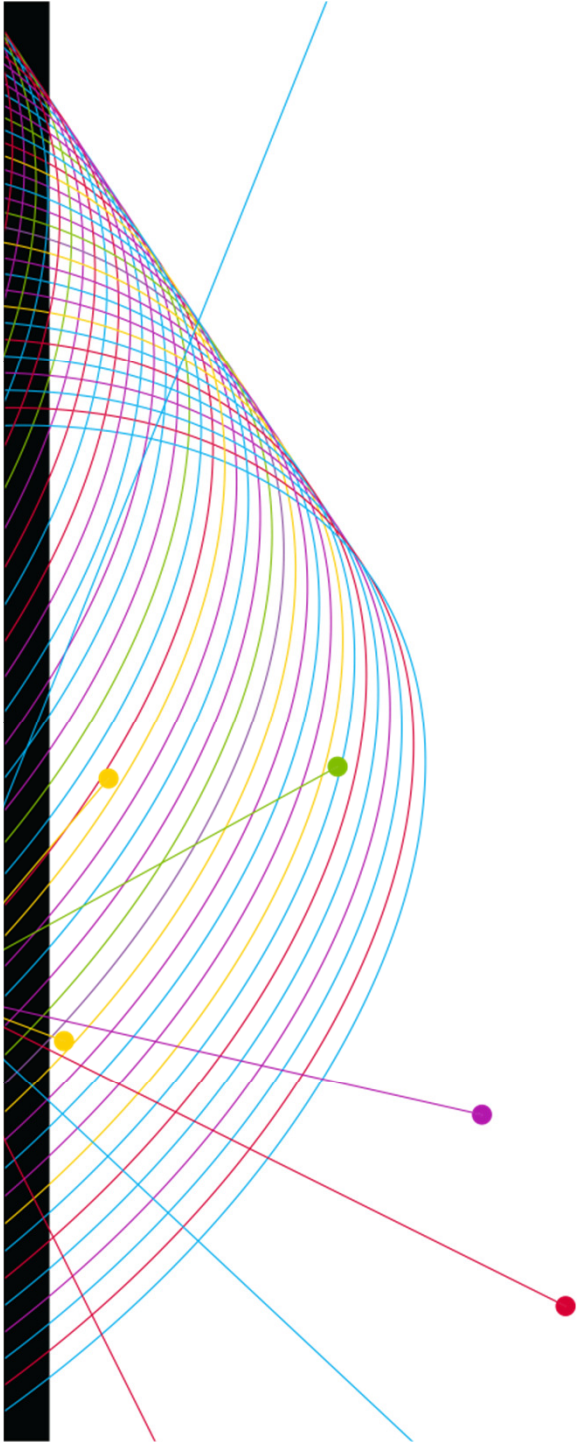
6-10 YEARS

- Those whose main reason for belonging to a club is to *have fun* (22% cf. 14% total)
- Those who are likely to rejoin next season (16%)
- Those of flying membership level (16%)
- Those aged 35-44 years (27%)

48%

MORE THAN 10 YEARS

- Those in the role of Club President or another office holder (77% cf. 48%) / coach or instructor (74%) / Committee Member (67%)
- Those aged 65+ (72%) / 55-64 (57%)
- Promoters (52%)



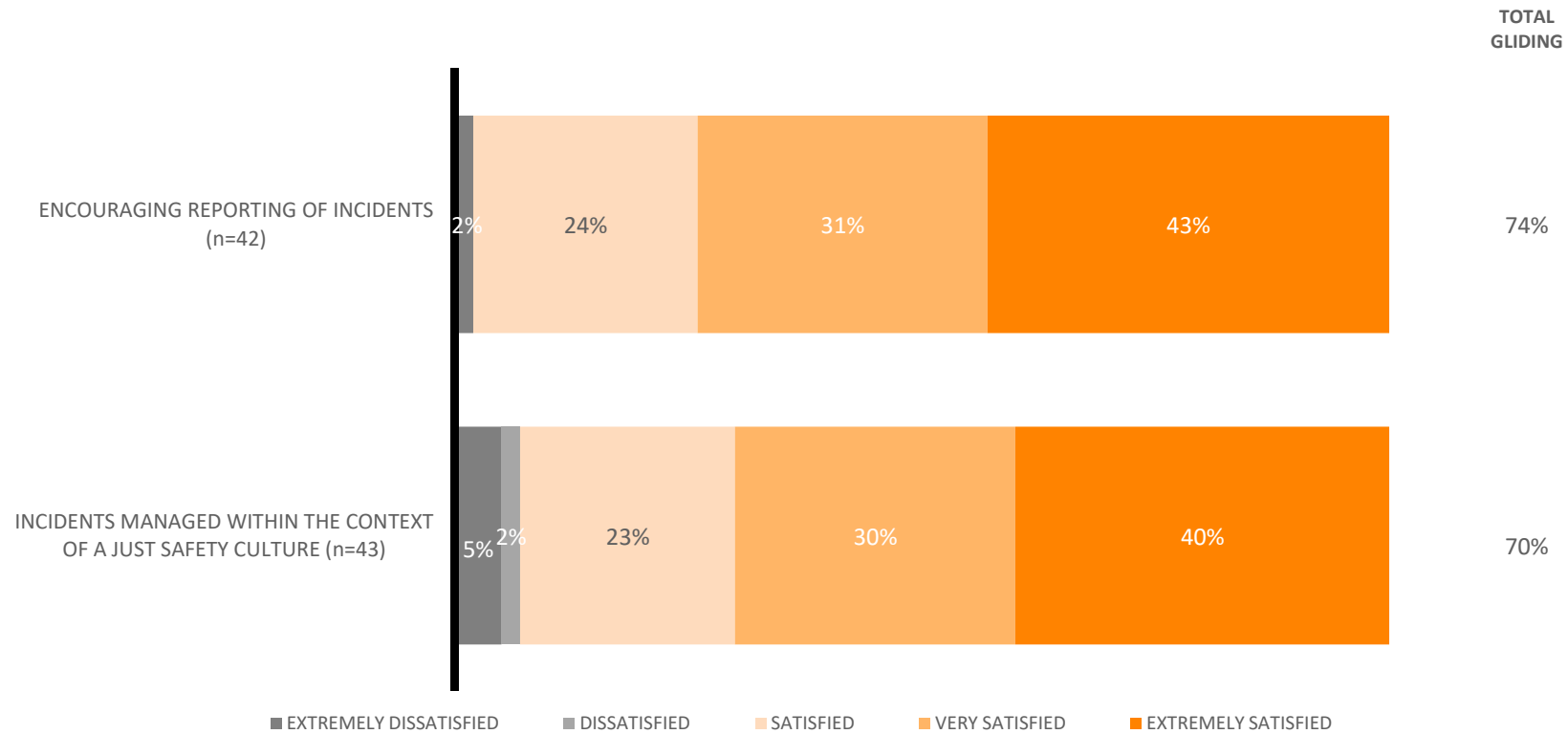
INCIDENT MANAGEMENT

INCIDENT MANAGEMENT



12% have been involved in an incident in the last 12 months.

% VERY SATISFIED OR EXTREMELY SATISFIED

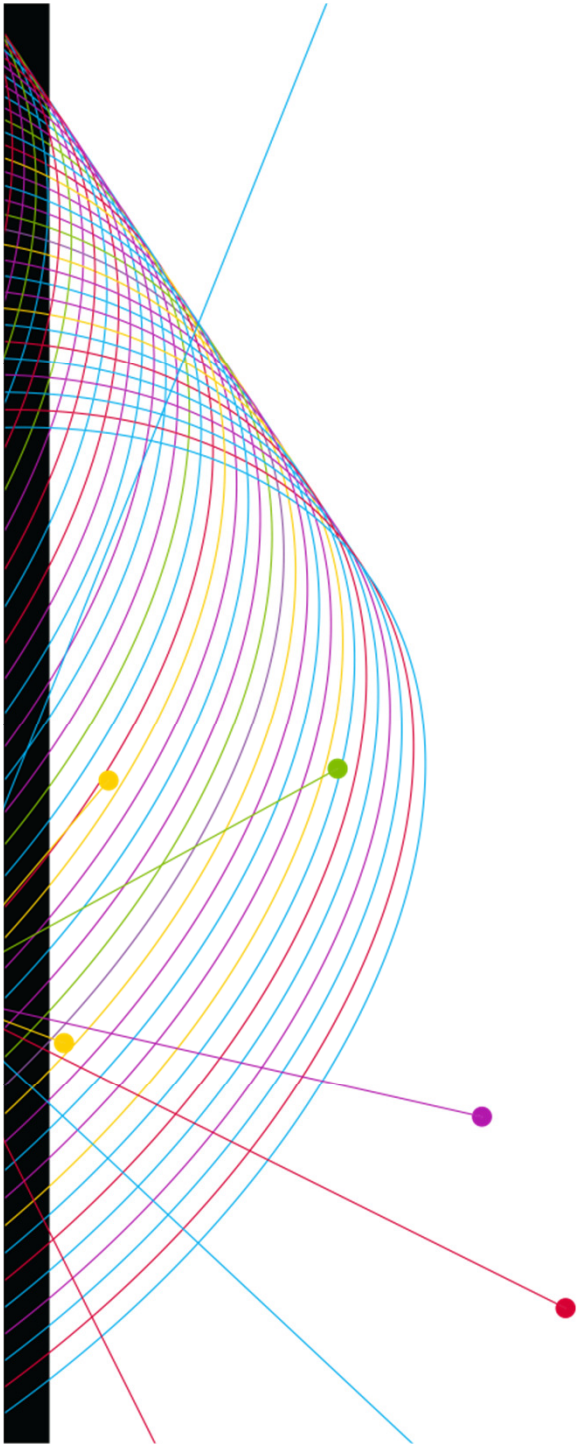


Base: All Respondents (n=361)

Q17. Have/ Has you/ your child been involved in an incident while flying in the last 12 months?

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

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



DEMOGRAPHIC DIFFERENCES

ONE IN TEN ARE AGED UNDER 24

Just over a tenth of pilots are aged under 24 (11%).

A high proportion (78%) of pilots are aged 45+, with 30% over 65.

When asked to select one aspect they are least satisfied with, those aged 45-54 indicated they are least satisfied with *having clean and well maintained facilities* (24% cf. 13%).

How does the 65+ age group differ?

When compared to the total, those aged 65+ are *significantly more* likely to be:

- Members for longer than 10 years (72% cf. 48%)
- Those who have been a member of another club (63% cf. 53%)
- Those who are very or extremely satisfied that their club *is fair and provides equal opportunities for all members* (72% cf. 64%)
- Promoters (75% cf. 65%)

KEY METRICS BY AGE

Performance across the KPIs differs markedly when broken down by age. The *significantly higher* NPS for those aged 65+ is driven by a large proportion of promoters.

	SATISFACTION	NPS	VALUE FOR MONEY	LIKELIHOOD TO REJOIN	JOINING PROCESS
ADULT (NET 16-19 YEARS) (n=16)*	88%	50	81%	87%	45%
ADULT (NET 20-24 YEARS) (n=22)*	82%	59	86%	90%	45%
ADULT (NET 25-34 YEARS) (n=21)*	48%	29	70%	85%	79%
ADULT (NET 35-44 YEARS) (n=37)*	51%	30	76%	81%	75%
ADULT (NET 45-54 YEARS) (n=71)	59%	50	78%	87%	67%
ADULT (NET 55-64 YEARS) (n=101)	57%	45	80%	90%	66%
ADULT (NET 65+ YEARS) (n=111)	63%	64 ▲	85%	90%	46%

* Low base size. Under 16's (n=2) removed from table due to very low base

▲▼ Significantly higher/lower than Total

FOUR IN FIVE IDENTIFY AS NZ EUROPEAN

Four in five pilots identify as NZ European (80%). This number increases to 91% when included those who identify as having European ethnicity.

When asked to select one aspect they are least satisfied with, those of NZ European ethnicity indicated that they are least satisfied with their club *being professional* (12%).

How does the NZ European ethnicity differ?

When compared to the total, those who identify as NZ European are *significantly more* likely to be:

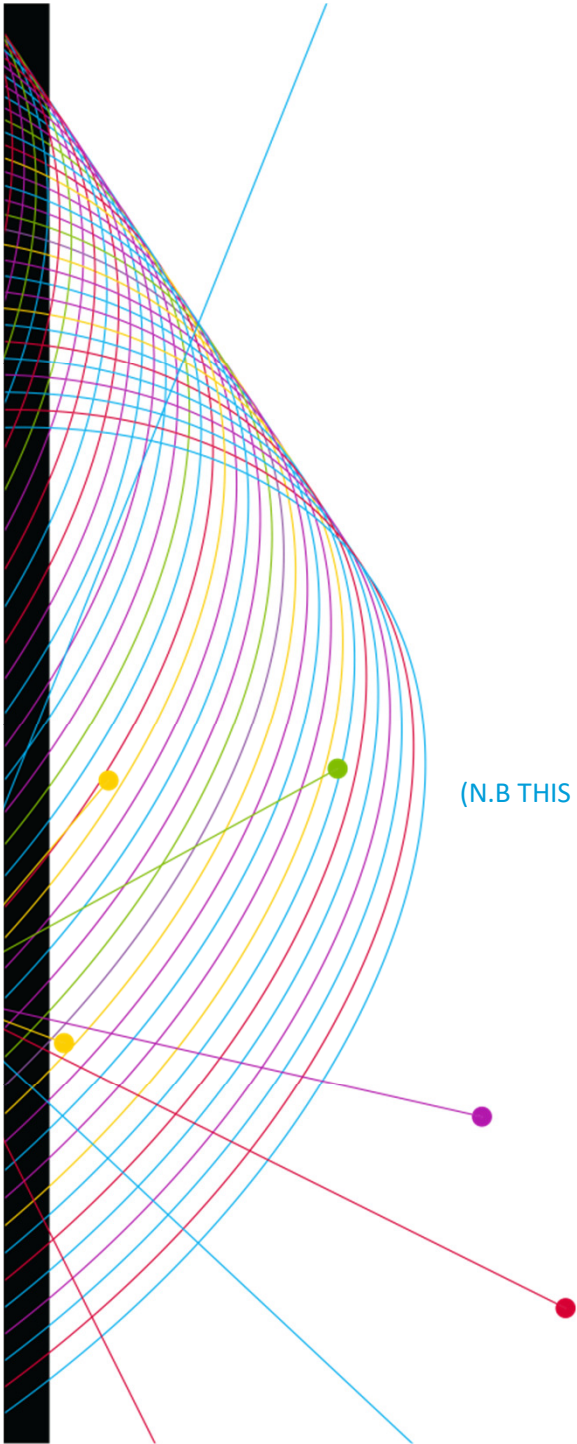
- Members for longer than 10 years (52% cf. 48%)
- Those who hold the role of club president or another office (17% cf. 15%)
- Those who are very likely to rejoin their club next season (80% cf. 77%)

KEY METRICS BY ETHNICITY

ETHNIC GROUP (%)	SATISFACTION	NPS	VALUE FOR MONEY	LIKELIHOOD TO REJOIN	JOINING PROCESS
NZ EUROPEAN / PAKEHA (n=282)	60%	52	81%	89%	64%
NET EUROPEAN (n=333)	59%	50	81%	89%	61%

Note: Maori (n=2), Pacific Island (n=1), Asian/Indian (n=5) removed from table due to very low base

▲▼ Significantly higher/lower than Total



REGIONAL DIFFERENCES

(N.B THIS IS BASED ON REGION OF RESIDENCE. ASTERISKS ARE USED TO INDICATE LOW BASE SIZES, WHERE RESULTS ARE INDICATIVE ONLY)

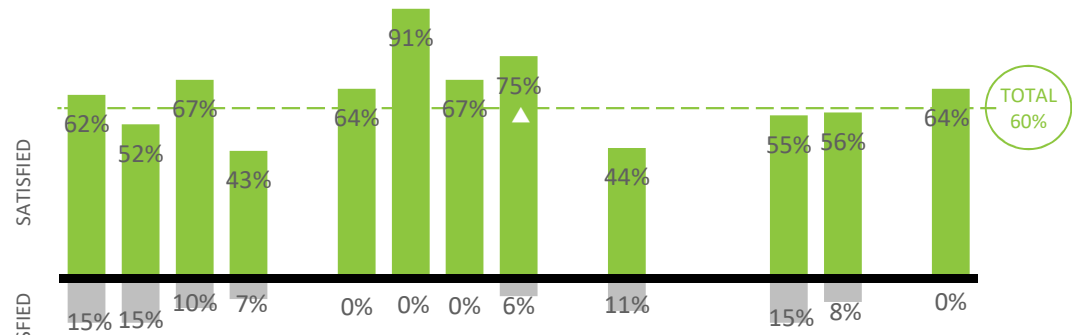
REGIONAL BREAKDOWN OF KEY MEASURES

NB: Whether a score is significant is dependant on variance and sample size.

OVERALL SATISFACTION

(Q6: % very satisfied or extremely satisfied)

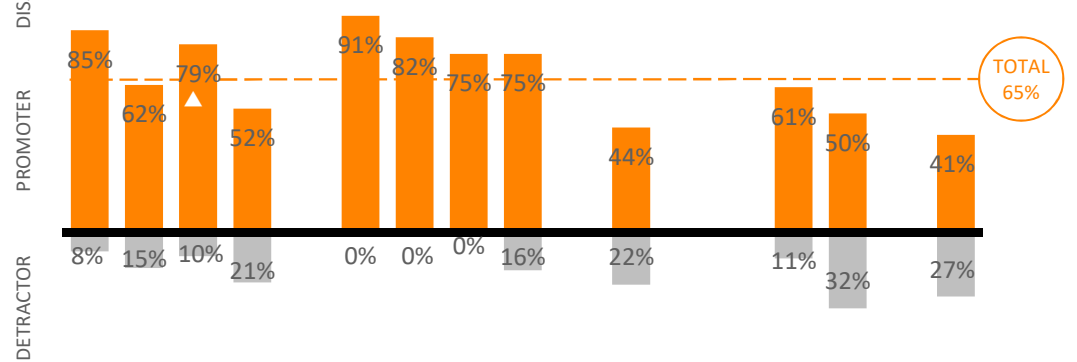
Those in Wellington/Wairarapa are significantly more likely to be satisfied (very satisfied/extremely satisfied) (75% cf. 60%). Gisborne, Tasman, Marlborough, West Coast and Southland have insufficient base sizes to be able to display results.



NET PROMOTER SCORE

(Q7: % promoters less % detractors)

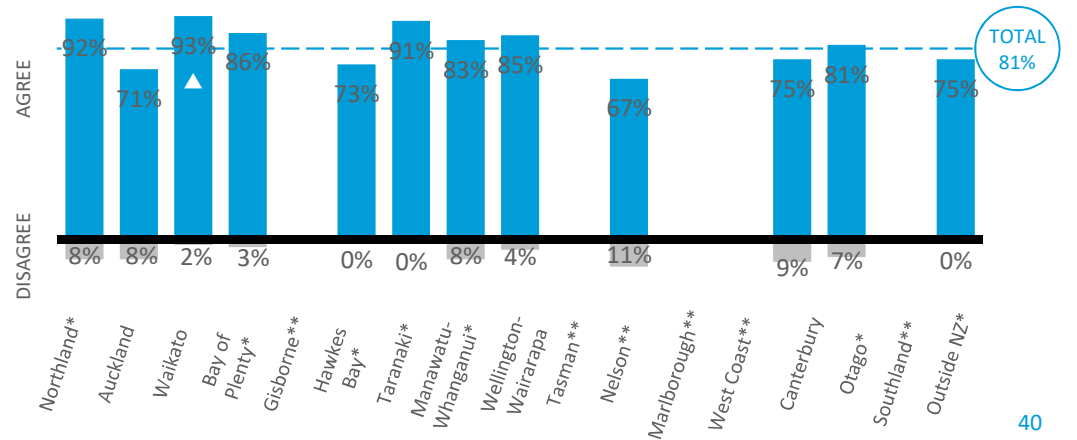
Those in Waikato are significantly more likely to be promoters (79 cf. 65). Gisborne, Tasman, Marlborough, West Coast and Southland have insufficient base sizes to be able to display results.



VALUE FOR MONEY

(Q11: % agree or strongly agree)

Those in Waikato are significantly more likely to agree that their club provides value for money (93% cf. 81%). Gisborne, Tasman, Marlborough, West Coast and Southland have insufficient base sizes to be able to display results.



*Low base size (less than 30 respondents)

**Very low base size (less than 10 respondents)

Note: Results have been removed for regions with less than 5 respondents to protect confidentiality

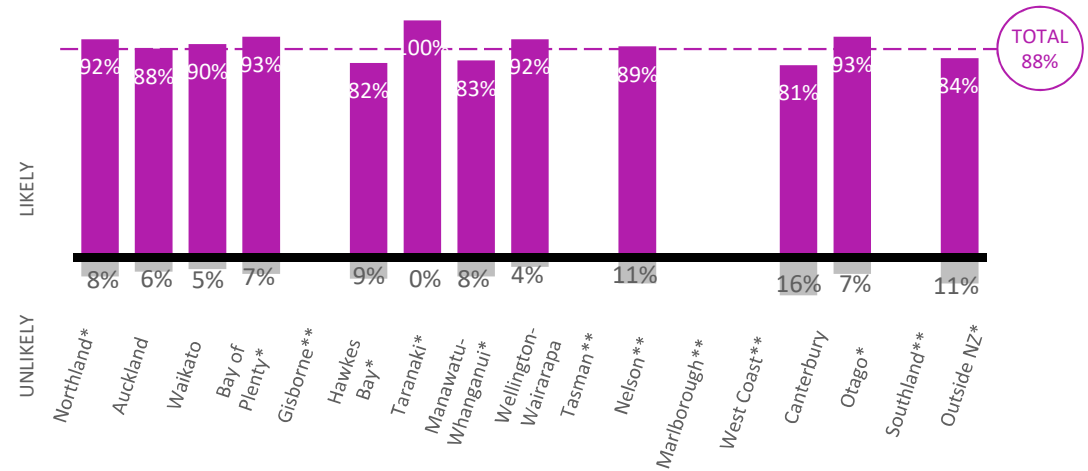
▲ ▼ Significantly higher/lower than Total

REGIONAL BREAKDOWN OF KEY MEASURES

LIKELIHOOD TO REJOIN

(Q9: % quite likely or very likely)

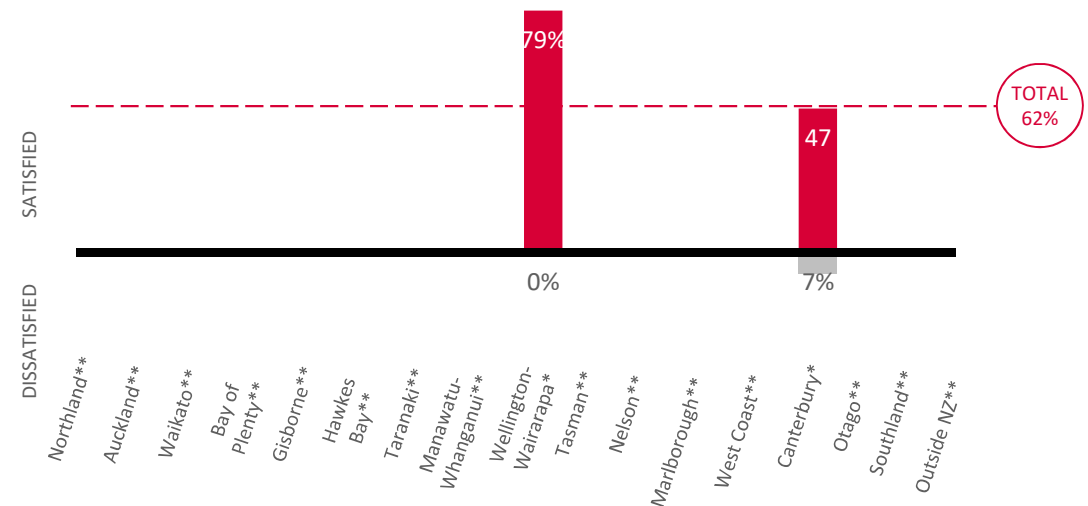
A high proportion of pilots are likely to rejoin their club next season. There are no significant differences between regions. Gisborne, Tasman, Marlborough, West Coast and Southland have insufficient base sizes to be able to display results.



JOINING PROCESS

(Q20: % very satisfied or extremely satisfied – average of 4 attributes)

NB: There is a very low base for this question (n=37), so there are no significant differences. Only Wellington-Wairarapa and Canterbury have sufficient base sizes to be able to display results.

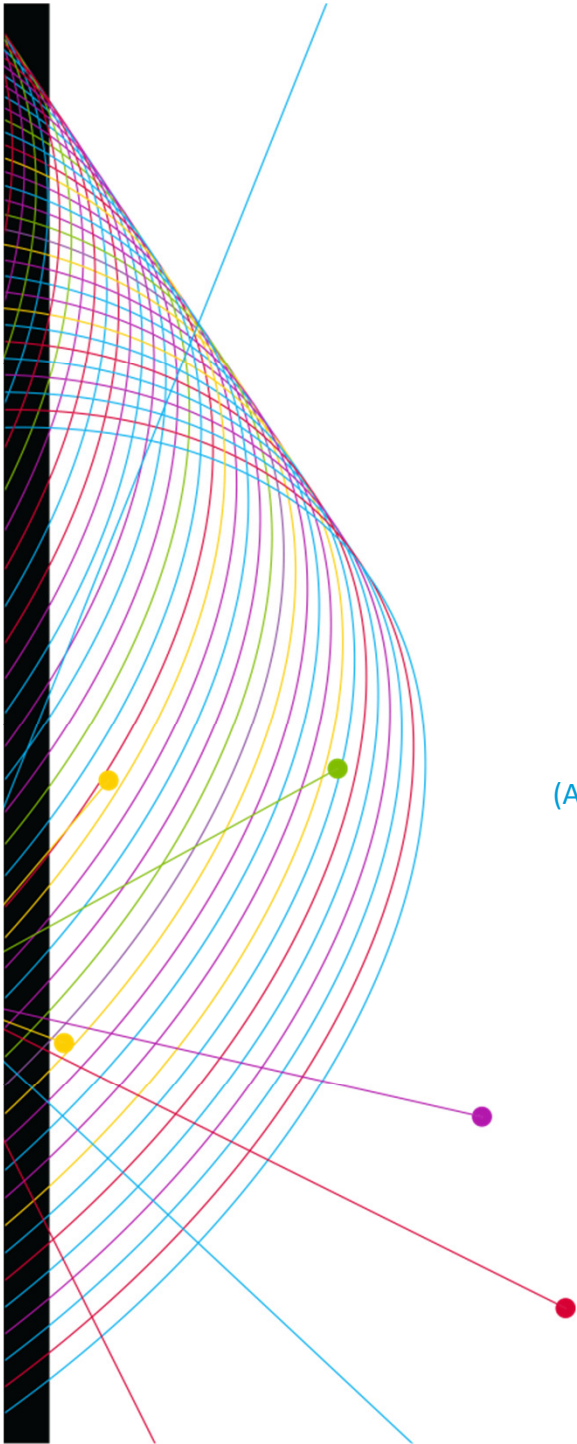


*Low base size (less than 30 respondents)

**Very low base size (less than 10 respondents)

Note: Results have been removed for regions with less than 5 respondents to protect confidentiality

▲ ▼ Significantly higher/lower than Total



CLUB DIFFERENCES

(ASTERISKS ARE USED TO INDICATE LOW BASE SIZES, WHERE RESULTS ARE INDICATIVE ONLY)

SATISFACTION ACROSS FACTORS – CLUBS

Those who are members of Gliding clubs in Auckland (AKL) have a *significantly lower* number of pilots who are very or extremely satisfied with seven of the nine factors. Conversely, those in Wellington (WLN) are *significantly more* likely to be satisfied with *allowing me to fulfil my potential* (79% cf. 65%), *being professional and well managed* (79% cf. 60%) and the *social environment of their club* (72% cf 57%).

% VERY SATISFIED OR EXTREMELY SATISFIED

	TOTAL GLIDING	AAV*	AKL	COT**	CTY	GHV***	GOM*	GWR**	HBV*	KKE*	MLB**	MSN**	NLN*	OGC*	PKO	SCY**	TGA*	TPO*	TRK*	WGM*	WLN
THE QUALITY OF THE COACHES (n=340)	71%	93%	36%	80%	75%	100%	90%	100%	70%	58%	60%	100%	27%	74%	83%	29%	75%	71%	90%	77%	76%
BEING FRIENDLY AND WELCOMING (n=359)	70%	93%	39%	33%	78%	100%	73%	83%	60%	50%	60%	100%	45%	59%	77%	57%	40%	90%	91%	100%	80%
HAVING WELL MAINTAINED CLUB GLIDERS AND LAUNCH FACILITIES (n=334)	69%	92%	51%	-	86%	100%	64%	33%	60%	60%	20%	100%	80%	74%	55%	43%	68%	100%	100%	77%	58%
ALLOWING ME/ THEM TO FULFIL MY/ THEIR POTENTIAL (n=341)	65%	85%	41%	33%	60%	50%	55%	40%	56%	45%	60%	100%	64%	58%	72%	14%	68%	95%	73%	71%	79%
IS FAIR AND PROVIDES EQUAL OPPORTUNITIES FOR ALL MEMBERS (n=351)	64%	86%	23%	33%	65%	100%	67%	67%	60%	42%	60%	100%	55%	57%	74%	43%	53%	95%	100%	93%	68%
PROVIDING ME/ THEM THE INFORMATION I/ THEY NEED WHEN I/ THEY NEED IT (n=350)	60%	86%	32%	50%	58%	50%	58%	50%	50%	70%	40%	100%	55%	52%	55%	43%	63%	71%	82%	64%	72%
BEING PROFESSIONAL AND WELL MANAGED (n=357)	60%	93%	14%	33%	57%	100%	67%	50%	40%	42%	20%	100%	18%	66%	74%	29%	45%	100%	82%	62%	79%
HAVING CLEAN AND WELL MAINTAINED FACILITIES E.G. CLUBROOMS, CHANGING ROOMS, TOILETS (n=323)	59%	30%	38%	50%	56%	50%	82%	33%	40%	27%	50%	100%	45%	73%	87%	29%	70%	100%	88%	86%	42%
THE SOCIAL ENVIRONMENT AT THE CLUB (n=352)	57%	79%	42%	17%	70%	-	58%	67%	67%	42%	50%	100%	18%	36%	65%	43%	25%	71%	55%	86%	72%

Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/not applicable)
 Q10b. How would you rate your/ your child's overall satisfaction with your/ their gliding club on each of the following...

 / Significantly higher/lower than Total Gliding 2016/17

*Low base size (less than 30 respondents), **Very low base size (less than 10 respondents)
 Note: Results have been removed for clubs with less than 5 respondents to protect confidentiality i.e. CLV, NRF, ROT, WHG

SATISFACTION ACROSS FACTORS – CLUBS

Respondents from Piako (PKO) are *significantly more* likely to be satisfied with their club *encouraging good sportsmanship and fair play* (90% cf. 68%). Four in five respondents from Canterbury (CTY) are satisfied that their club *provides a safe environment for adults and children* (83% cf 68%), a significantly higher score than the total.

% VERY SATISFIED OR EXTREMELY SATISFIED

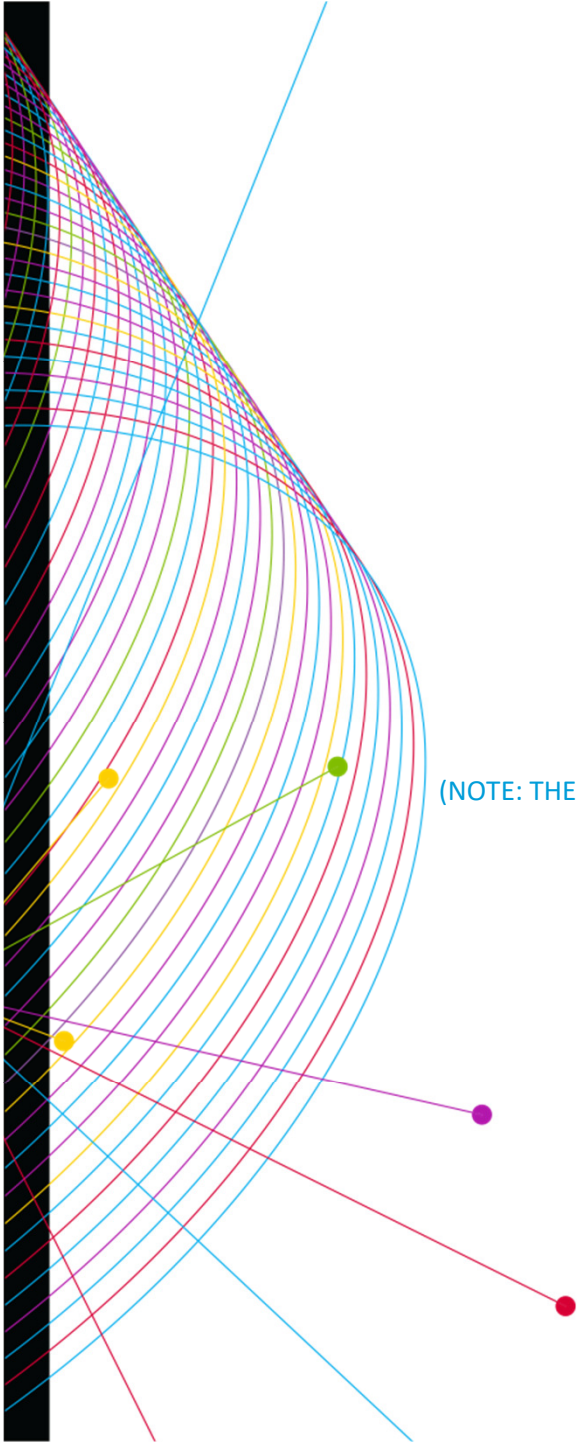
	TOTAL GLIDING	AAV*	AKL	COT**	CTY	GOM*	GWR**	HBV**	KKE**	NLN*	OGC*	PKO	SCY**	TGA*	TPO*	TRK**	WGM**	WLN
ENCOURAGING GOOD SPORTSMANSHIP AND FAIR PLAY (n=322)	68%	79%	34%	60%	73%	64%	60%	63%	67%	30%	61%	90%	50%	47%	95%	100%	71%	81%
PROVIDING A SAFE ENVIRONMENT FOR ADULTS AND CHILDREN (n=338)	68%	89%	43%	17%	83%	70%	100%	70%	50%	30%	52%	83%	29%	58%	86%	89%	79%	71%
THE EASE OF ACCESSING CLUB GLIDERS/ LAUNCH FACILITIES (n=339)	62%	70%	41%	20%	67%	73%	50%	44%	73%	10%	57%	87%	29%	63%	85%	100%	77%	52%
FOSTERING A SENSE OF PRIDE IN OUR/ THEIR CLUB (n=342)	56%	75%	29%	25%	71%	50%	33%	44%	30%	20%	39%	65%	29%	35%	86%	82%	71%	76%
HAVING QUALIFIED/ EXPERIENCED OFFICIALS AVAILABLE WHEN I/ THEY COMPETE (n=204)	53%	62%	43%	-	62%	44%	-	83%	17%	33%	38%	64%	50%	40%	85%	50%	57%	54%
BEING RESPONSIVE TO MY/ THEIR NEEDS AND REQUIREMENTS (n=341)	52%	69%	25%	17%	62%	58%	33%	44%	42%	27%	56%	45%	33%	39%	80%	82%	71%	58%
PROVIDING INFORMATION ABOUT JUNIOR PROGRAMMES (n=262)	47%	64%	21%	-	65%	55%	50%	80%	11%	38%	39%	32%	-	31%	53%	60%	75%	61%
ENGAGING WITH THE LOCAL COMMUNITY (n=311)	47%	38%	25%	20%	66%	73%	20%	44%	11%	33%	32%	46%	29%	13%	38%	82%	57%	81%
MAKING ME/ THEM AWARE OF THE DEVELOPMENTS OCCURRING IN SPORT ACROSS NEW ZEALAND (n=325)	45%	63%	32%	25%	48%	36%	40%	50%	30%	20%	30%	45%	17%	44%	55%	73%	36%	58%
MAKING ME/ YOU AWARE OF THE BENEFITS PROVIDED TO ME (n=324)	44%	56%	21%	33%	56%	30%	17%	67%	30%	36%	30%	33%	20%	33%	70%	80%	67%	51%
PROVIDING INFORMATION AND OPPORTUNITIES FOR COACH DEVELOPMENT (n=274)	43%	48%	21%	-	50%	42%	20%	56%	25%	-	44%	48%	17%	35%	59%	75%	57%	55%

Base: Respondents who are members or fly casually at a Gliding club (Excluding Don't know/not applicable)
 Q10b. How would you rate your/ your child's overall satisfaction with your/ their gliding club on each of the following...

 / Significantly higher/lower than Total Gliding 2016/17

*Low base size (less than 30 respondents), **Very low base size (less than 10 respondents)

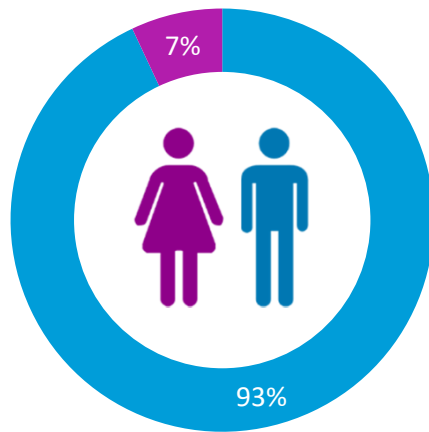
Note: Results have been removed for clubs with less than 5 respondents to protect confidentiality i.e. GHV, MLB, MSN, CLV, NRF, ROT, WHG



SAMPLE PROFILE

(NOTE: THERE WERE ONLY TWO PARENTS OF PILOTS WHO COMPLETED THE SURVEY SO RESULTS HAVE NOT BEEN SPLIT OUT BY ADULT PILOTS AND PARENTS)

SAMPLE PROFILE



- MALE
- FEMALE
- GENDER DIVERSE

AGE	TOTAL GLIDING (n=365)
Less than 16 years	1%
16-19 years	4%
20-24 years	2%
25-29 years	4%
30-34 years	2%
35-39 years	3%
40-44 years	7%
45-49 years	8%
50-54 years	11%
55-59 years	13%
60-64 years	14%
65-69 years	13%
70-74 years	11%
75+ years	7%

REGION	TOTAL GLIDING (n=365)
Northland	4%
Auckland	18%
Waikato	12%
Bay of Plenty	8%
Gisborne	0%
Hawke's Bay	3%
Taranaki	3%
Manawatu-Whanganui	3%
Wellington-Wairarapa	15%
Tasman	1%
Nelson	2%
Marlborough	1%
West Coast	0%
Canterbury	16%
Otago	8%
Southland	0%
Outside NZ	6%

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Base: All respondents
 Q25. Are/ Is you/ your child...?
 Q22. In which of the following age groups do/ does you/ your child belong?
 Q23. Which of the following regions do/does you/your child live in?

* Small base sizes

SAMPLE PROFILE

ROLE AT THE CLUB	TOTAL GLIDING (n=361)
Pilots	73%
Coach or Instructor	30%
Manager	1%
Committee Member	20%
Official/ referee/ judge	4%
Club President or another office holder	15%
Other	5%

COMPETITIVE LEVEL	TOTAL GLIDING (n=361)
Flew for the top team at my club	0%
Been selected to represent my club at a regional event/ competition	8%
Been selected to represent my region at a national event/ competition	6%
Been selected to represent New Zealand at an international event/ competition	1%
None of these	88%

Base: Respondents who are members or fly casually at a Gliding club

Q27. Which of the following describes your/ your child's role at your club? Note: Pilots can select more than one role at their club

Base: Respondents who are members or fly casually at a club

Q28. Have /Has you/ your child done any of the following in the last 12 months?

SAMPLE PROFILE

MEMBERSHIP TENURE	TOTAL GLIDING (n=360)
Less than 1 year	11%
1-2 years	12%
3-5 years	16%
6-10 years	14%
More than 10 years	48%

FLYING FREQUENCY	TOTAL GLIDING (n=361)
Less than once a month	9%
Once a month	11%
Two or three times a month	36%
Four or five times a month	15%
6 or more times a month	20%
Other	8%

Base: Respondents who are members of a Gliding club

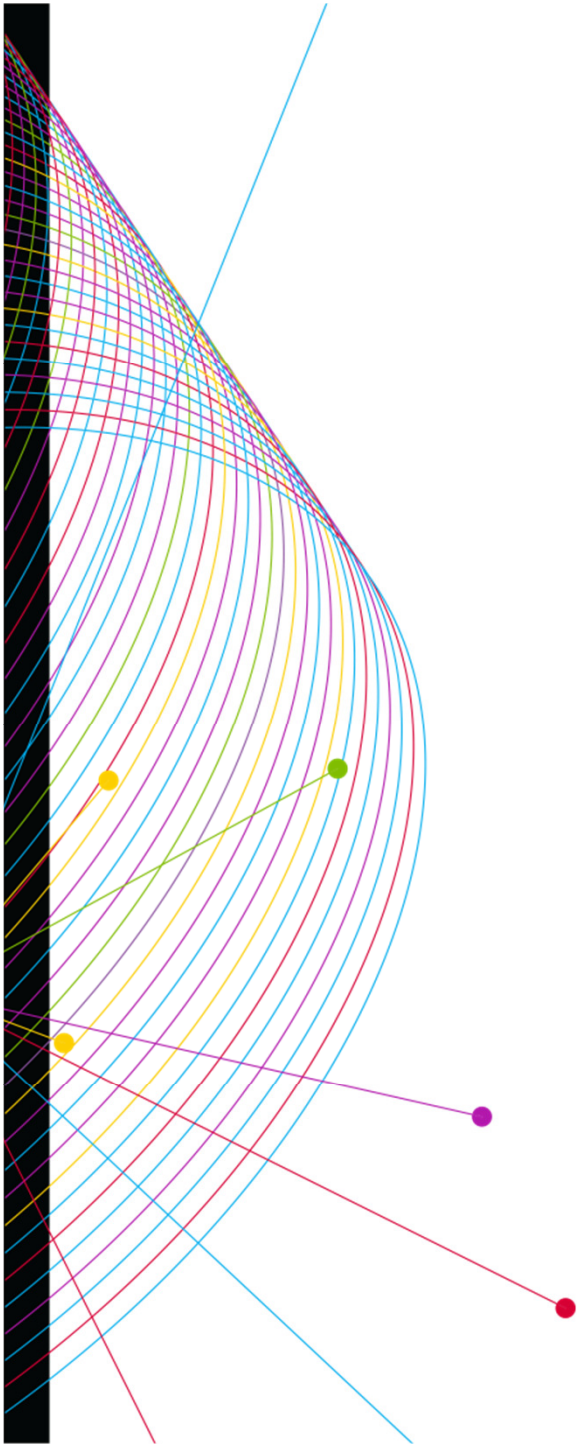
Q3. How long have/ has you/ your child been a member of your/ their club?

Base: Respondents who are members or fly casually at a Gliding club

Q5. During the season, how often on average would you/ your child glide per week (including training and competitions)?

SAMPLE PROFILE

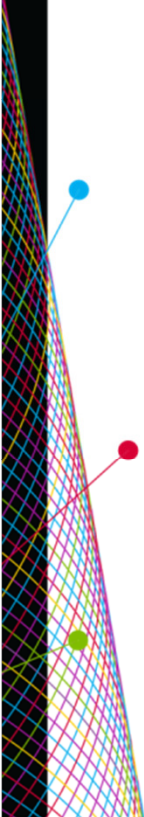
REGION	TOTAL GLIDING (n=360)
Auckland - AAV	8%
Auckland - AKL	11%
Balclutha - CLV	1%
Central Otago - COT	2%
Canterbury - CTY	13%
Hutt Valley - GHV	1%
Omarama - GOM	3%
Wairarapa - GWR	2%
Hawkes Bay - HBY	3%
Kaikohe - KKE	3%
Marlborough - MLB	1%
Masterton - MSN	1%
Nelson - NLN	3%
Inglewood - NRF	0%
Omarama - OGC	8%
Piako - PKO	9%
Rotorua - ROT	1%
South Canterbury - SCY	2%
Tauranga - TGA	6%
Taupo - TPO	6%
Taranaki - TRK	3%
Manawatu - WGM	4%
Whangarei - WHG	0%
Wellington - WLN	11%



BACKGROUND, OBJECTIVES AND APPROACH

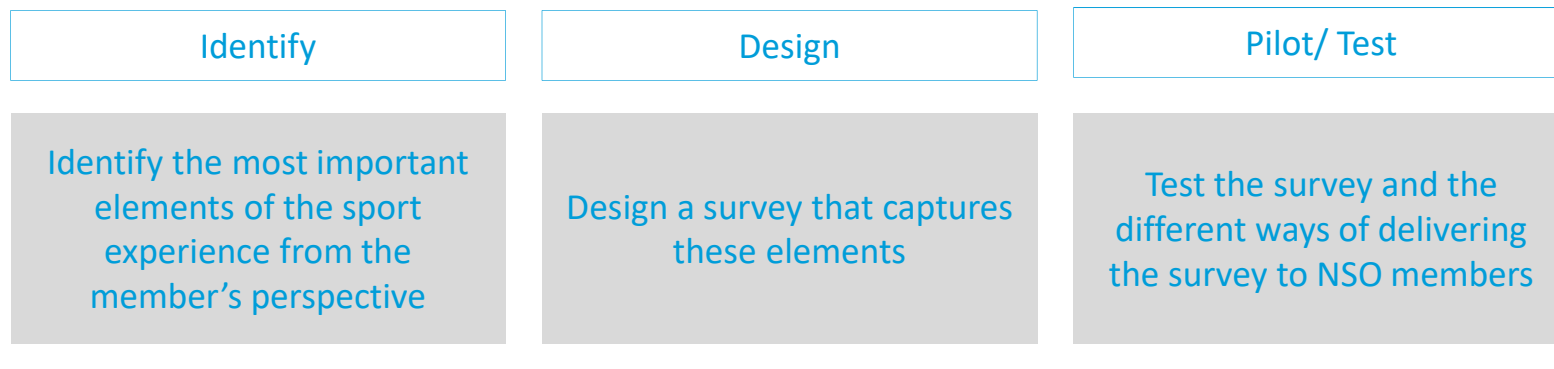
VOICE-OF-PARTICIPANT PROGRAMME

- This research is part of Sport New Zealand's Voice-of-Participant (VOP) programme to develop and implement a cross-sport and recreation sector approach; capturing, analysing, interpreting and using customer/ membership survey data.
- The objectives of the VOP programme are to:
 - Empower the sport system to respond to the wants and needs of customers.
 - Embed processes that continually put the participant at the centre of decision making.
 - Improve the development and delivery of products and services that meet the needs of participants.
 - Complement and systematize existing participant information and the processes by which participant information is gathered and analysed.
 - 'Bring' the voice-of-participant to the centre of the sport system (including Sport NZ).
- This part of the VOP programme is for National Sports Organisations (NSOs) to survey their members (i.e. players and parents of players) to understand the participant experience with their club.
- In future the programme will also roll out to cover events/ tournaments, RSTs/RSDs, TAs/ Councils, activities and even children doing sport at school.
- A customer/ participant experience approach is one that looks at behaviours, attitudes and needs as they relate to specific interaction points across total engagement with a sport/ service. It is valuable to organisations with members, helping them to understand how different interactions are perceived and what is really important to get right in order to retain and grow membership.



THE DEVELOPMENT OF VOP

- While some work had previously been undertaken by Sport NZ and NSOs to create draft 'welcome' and 'mid-season' surveys, it was felt it was important to incorporate the participant's point of view on what was most important to them, and then test the reviewed surveys.
- In 2015, an initial development phase was undertaken to design the survey tools i.e.



- The development phase involved both **qualitative** and **quantitative** components:
 - The qualitative (two online bulletin boards with 28 participants) was to understand what makes a good or bad experience, and what players consider their ideal experience
 - Based on the qualitative findings we designed an online questionnaire
 - We piloted the questionnaire, using three different methods of delivery, with members of four NSOs; New Zealand Football, Tennis New Zealand, Bowls New Zealand and New Zealand Rugby League.
- Subsequently, in consultation with Sport NZ and NSOs, we reviewed the survey tools and created a Survey Guide.
- The VOP for NSOs research was launched in Winter 2016 with Football, Rugby League and Netball. Summer Sports Athletics, Gliding, Bowls, Waka Ama, Cricket and Golf and Touch followed in March 2017.
- The results for winter 2016 and summer 2016/17 have been combined to represent the 2016/2017 year.

QUANTITATIVE METHODOLOGY

ONLINE SURVEY

Fieldwork took place between 2 March – 21 March 2017.



674 CLUB MEMBERS WERE INVITED

Gliding New Zealand supplied a database of pilots aged 16 plus and parents of pilots under the age of 16, to which email invitations were sent.

THE RESEARCH

WEIGHTING

Weighting was only applied to the 'All Sports 2016/17' result. This was to ensure each NSO contributed evenly to the total result.



365 PILOTS & PARENTS

A total of 365 pilots (16+ years old) and parents of pilots (< 16 years old) completed the survey from the database of 674, for a response rate of 48.7%. This gave a maximum margin of error of $\pm 1.1\%$.

FIELDWORK BREAKDOWN

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MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
27 FEB	28 FEB	1 MAR	2 MAR	3 MAR	4 MAR	5 MAR
				GLIDING LAUNCH		
				FIELD START	FIELDWORK	
6 MAR	7 MAR	8 MAR	9 MAR	10 MAR	11 MAR	12 MAR
FIELDWORK						
13 MAR	14 MAR	15 MAR	16 MAR	17 MAR	18 MAR	19 MAR
NIELSEN REMINDER 1		NIELSEN REMINDER 1		NIELSEN REMINDER 2		NIELSEN REMINDER 2
FIELDWORK						
20 MAR	21 MAR	22 MAR	23 MAR	24 MAR	25 MAR	26 MAR
FIELDWORK		FIELD END				

Note: Dates are 2017

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