



Research

*Fédération
Aéronautique
Internationale*

Online Pilot Survey Results

Country Development Working Group

Avenue Mon-Repos 24
CH-1005 Lausanne
(Switzerland)
Tél.: +41(0) 21/345.10.70
Fax: +41(0) 21/345.10.77
E-mail: sec@fai.org
Web: www.fai.org

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This survey was conducted by the Country Development Working Group of the IGC. The objective of the survey was to lay the foundation for a better understanding of the global gliding community and of the issues relevant to the development of the soaring in emerging gliding communities.

While we hope that you will find the results of the survey interesting, we would like to point out that they should be viewed as a starting point for consideration and discussion, rather than as finalized conclusions.

If you would like more information on research conducted by the Country Development working group, or are interested in the development initiatives of the group, please go to <http://www.fai.org/gliding/countrydev/> or contact us at igc-countrydev@fai.org.

*Chairman IGC – Country Development working group
Alexander Georgas*

1. Participation

The IGC Online Pilot Survey was conducted from 24 February to 30 March 2009. There were 3,434 valid entries from 55 different countries, representing 2.8% of the worldwide glider pilot membership.

When looking at the results throughout the report one should note that a few of the countries do not have a significant sample of responses. These countries are indicated in the table below with a star(*). Responses from these countries are included in the general results. However, where these results have been deemed unrepresentative, as in the case of country-by-country comparison, they have been omitted from the analysis

Table 1.1 – Pilot participation in survey

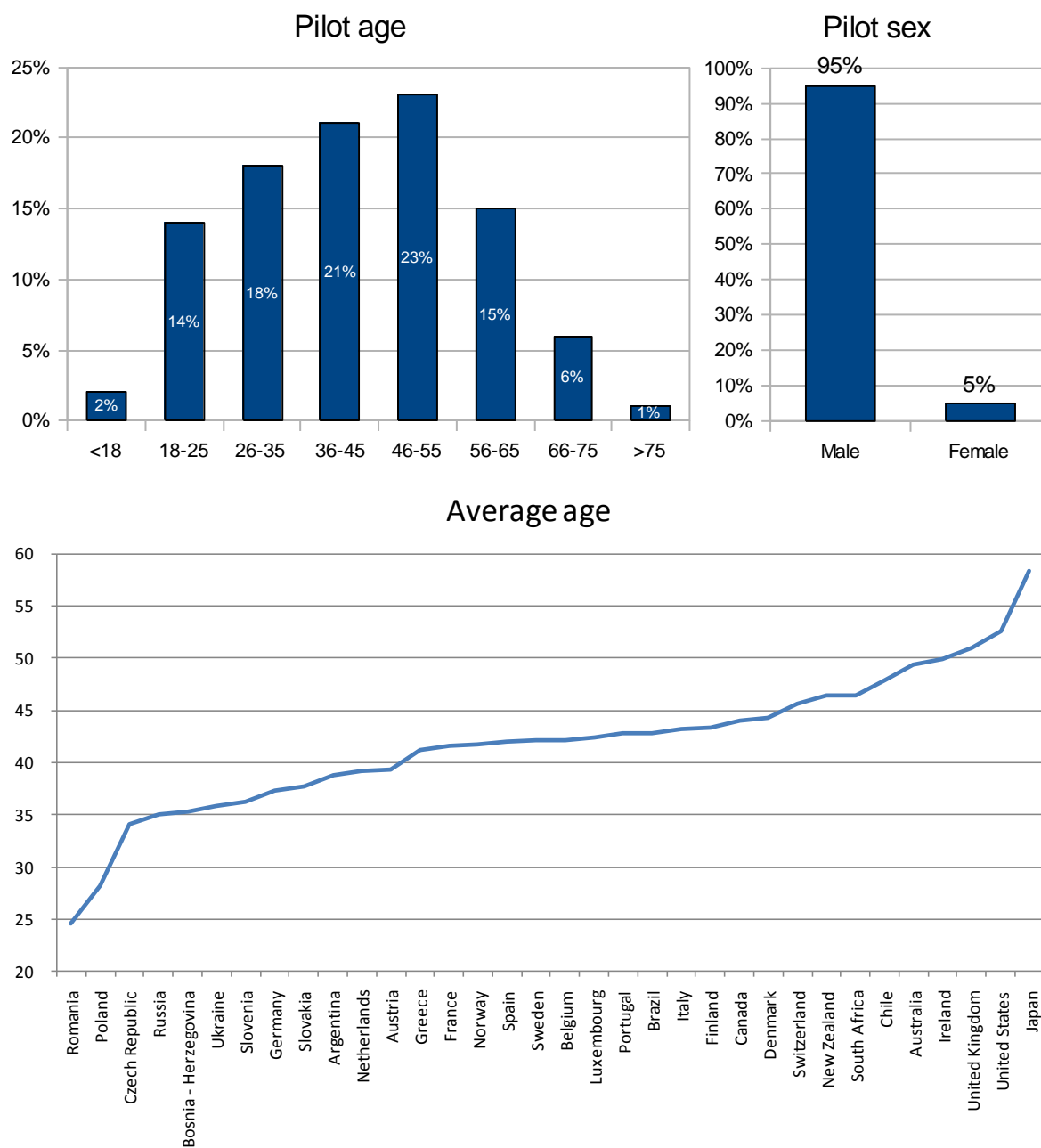
Country		Pilots	% of total membership	Country		Pilots	% of total membership
Andorra*	(AD)	1		Italy	(IT)	79	4.6%
Argentina	(AR)	119	72.1%	Japan	(JP)	12	1.8%
Australia	(AU)	165	6.8%	Lithuania*	(LT)	1	0.2%
Austria	(AT)	93	2.7%	Luxembourg	(LU)	10	28.6%
Belarus*	(BY)	2		Monaco*	(MC)	2	
Belgium	(BE)	84	4.9%	Namibia*	(NA)	1	
Bosnia - Herzegovina	(BA)	9		Netherlands	(NL)	112	2.9%
Brazil	(BR)	54		New Zealand	(NZ)	54	6.8%
Canada	(CA)	107	10.0%	Norway	(NO)	37	2.8%
Chile	(CL)	81	53.3%	Peru*	(PE)	1	
China*	(CN)	1	1.6%	Philippines*	(PH)	1	
Hong, China*	(HK)	1	2.1%	Poland	(PL)	126	5.5%
Colombia*	(CO)	1	3.3%	Portugal	(PT)	26	37.1%
Croatia*	(HR)	3	2.0%	Romania	(RO)	7	
Czech Republic	(CZ)	62	1.9%	Russia	(RU)	18	7.2%
Denmark	(DK)	303	18.0%	Serbia*	(RS)	2	1.5%
Egypt*	(EG)	1		Slovakia	(SK)	7	1.0%
Estonia*	(EE)	1		Slovenia	(SI)	38	6.8%
Finland	(FI)	77	3.4%	South Africa	(ZA)	26	4.5%
France	(FR)	154	1.3%	Spain	(ES)	7	1.4%
Germany	(DE)	665	2.2%	Sweden	(SE)	67	2.9%
Greece	(GR)	16	16.8%	Switzerland	(CH)	109	3.9%
Hungary*	(HU)	3	0.3%	Taiwan*	(TW)	1	
Iceland*	(IS)	2	3.8%	Turkey*	(TR)	1	
India*	(IN)	2		Ukraine	(UA)	6	
Ireland	(IE)	18	21.2%	United Kingdom	(GB)	445	5.5%
Isle of Man*	(IM)	1		United States	(US)	211	0.7%
Israel*	(IL)	1	0.6%				

The number of responses gathered can be considered to be statistically significant, although how representative the results are of the entire gliding community should be clarified. The methodology of statistics requires a sample to be carefully chosen in order to be representative of an entire population. In our case, the use of the internet as the medium for the survey, as well as the specific ways through which it was published (discussion groups, email lists, publications and in some cases word of mouth), have affected the profile of persons that have responded.

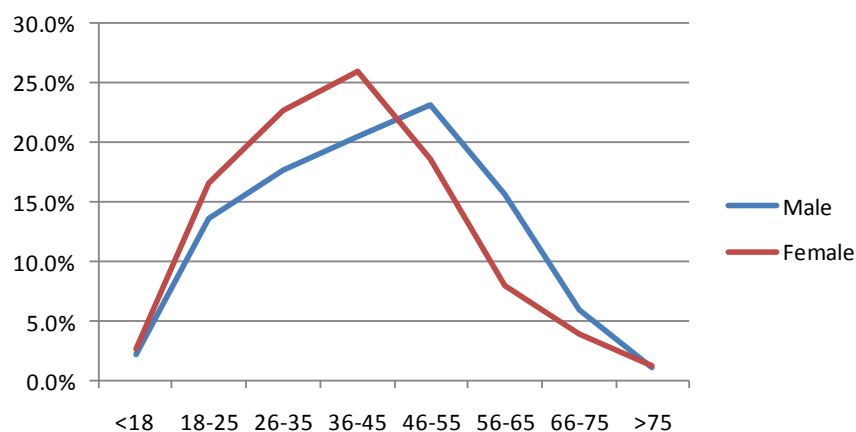
Due to the above factors, and as is apparent in the results, the community of cross-country and competition pilots is overrepresented in our sample. In the opinion of the author, this should not be regarded as a significant flaw of the analysis, when proper consideration of the results is made to reflect this fact. In a sense, the results of this survey are biased towards the opinions of some of the most involved members of our community and as such carry significant weight.

2. Pilot demographics

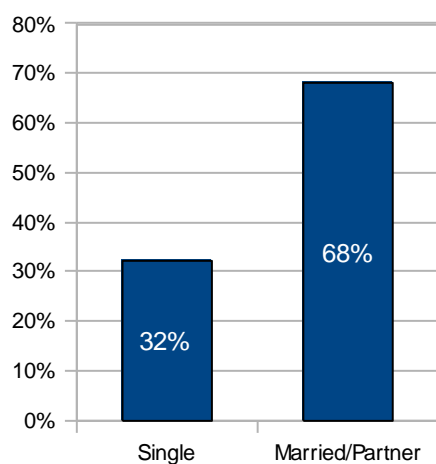
An analysis of the demographics of the survey respondents follows:



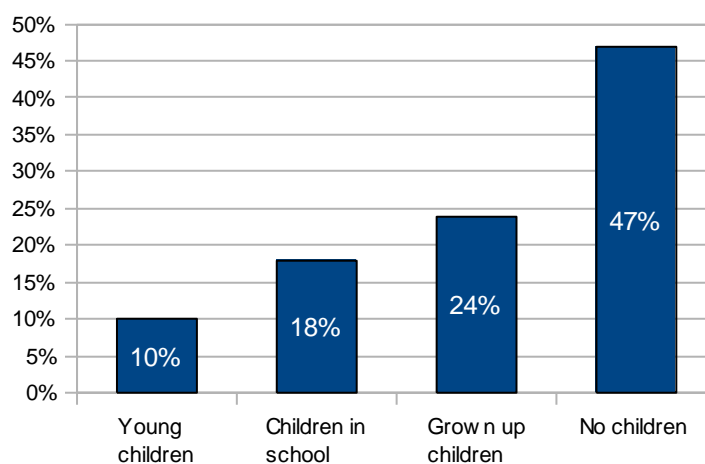
Age distribution according to sex



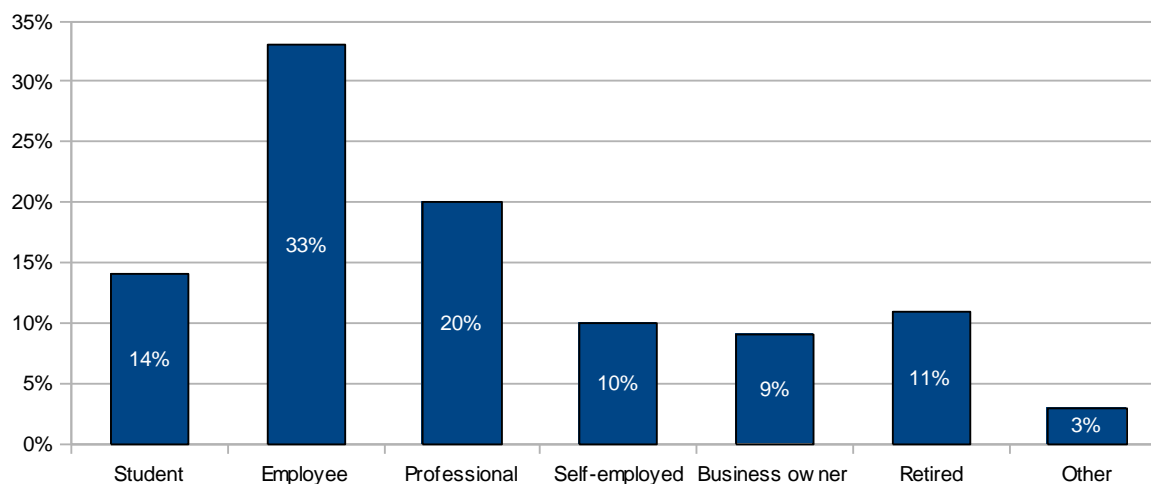
Marital Status



Family situation



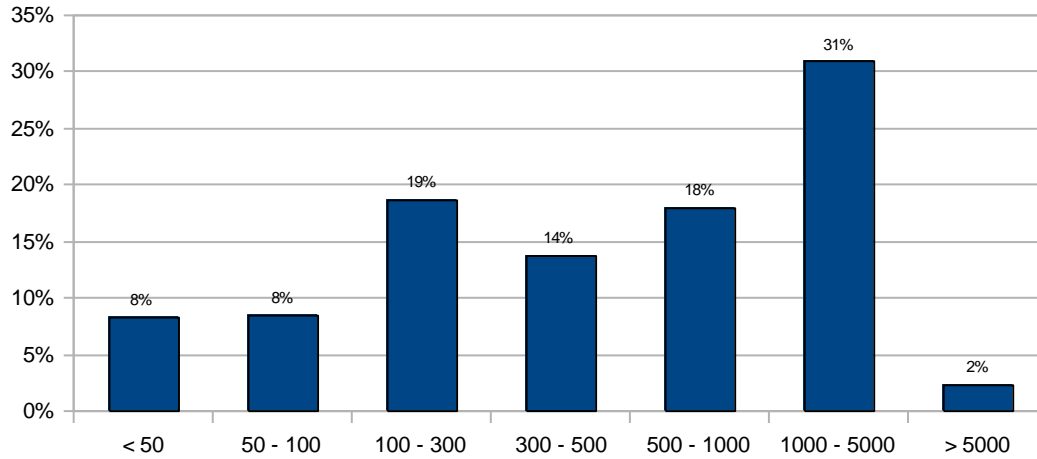
Employment



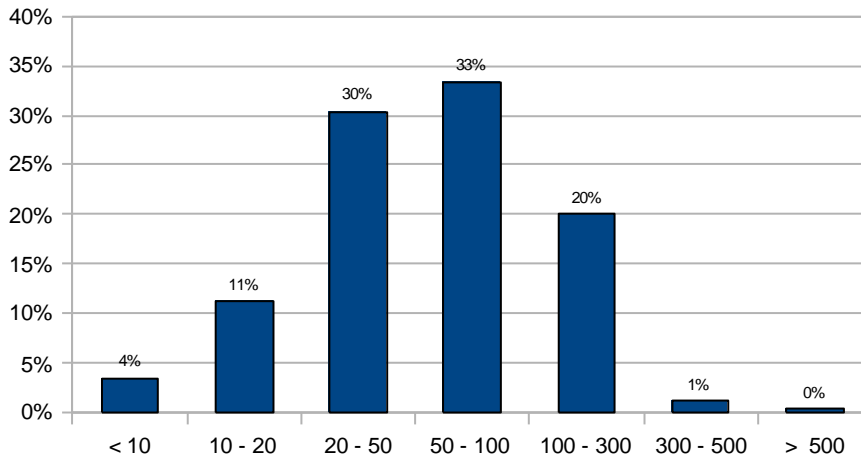
3. Pilot profile

In this section of the survey, pilots were asked about their pilot background and the type of gliding activities they participate in.

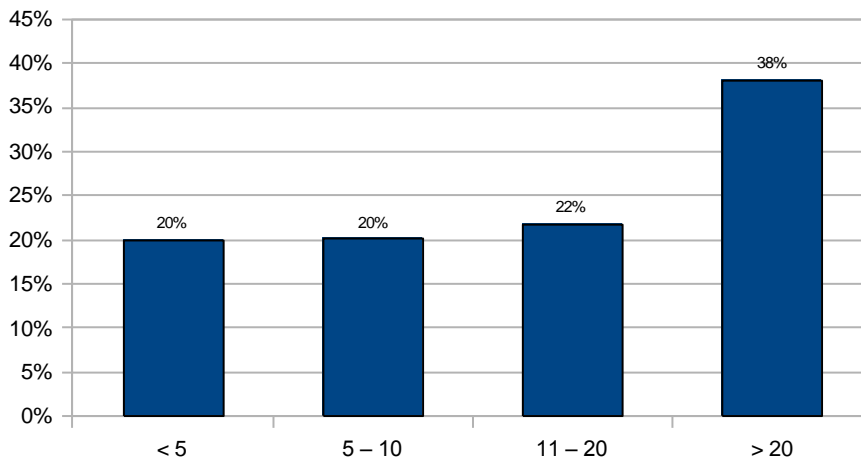
How many hours have you logged in gliders?



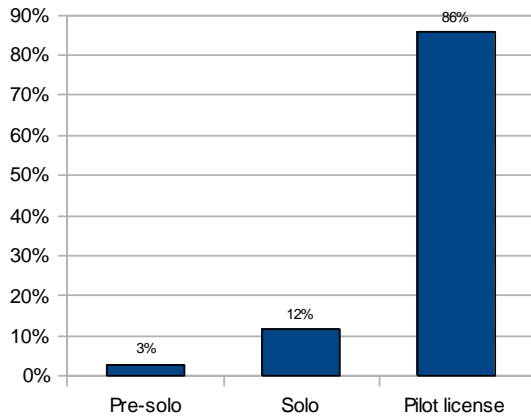
How many hours do you fly per year?



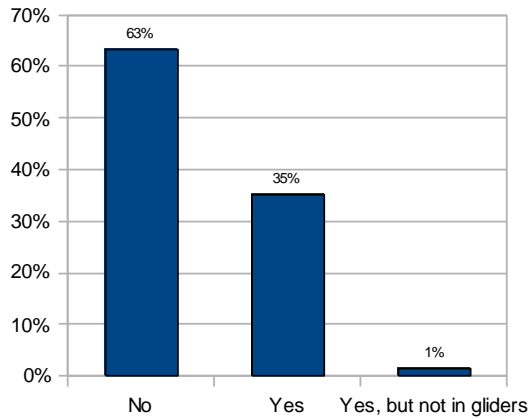
How long have you been flying gliders?



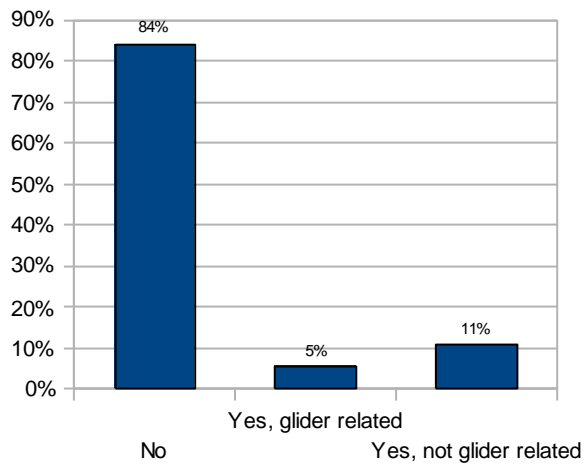
What is your glider pilot status?



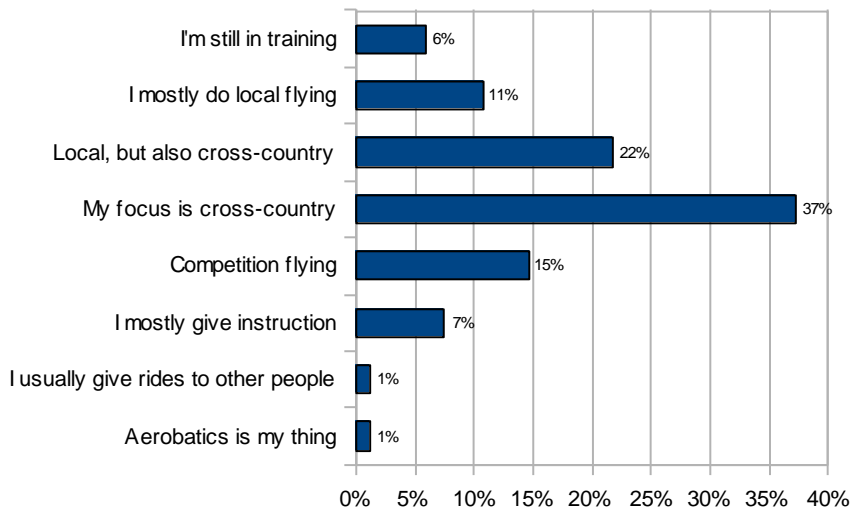
Do you hold an instructor rating?



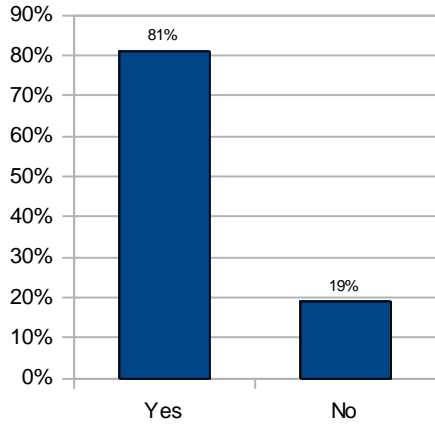
Are you an aviation professional?



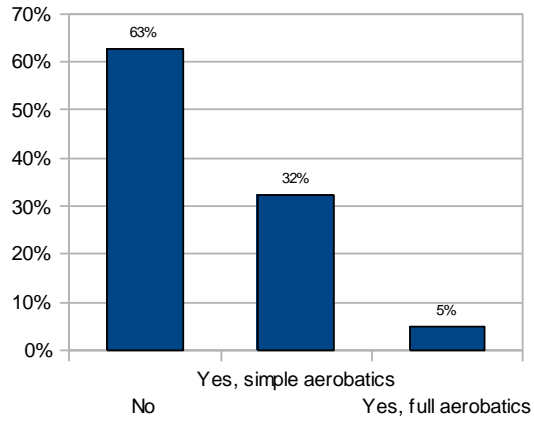
What type of flying characterizes you most?



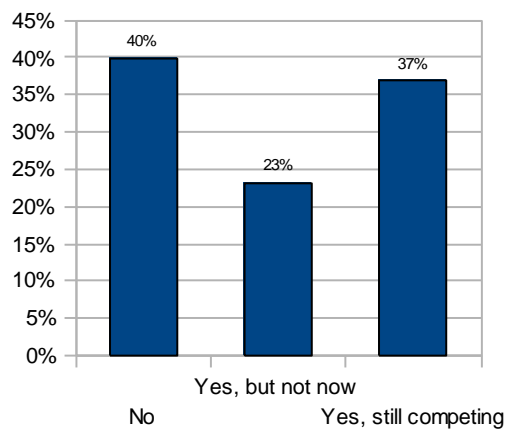
Do you fly cross-country?



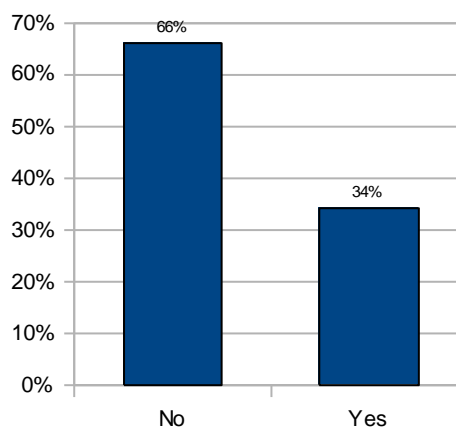
Do you fly aerobatics?



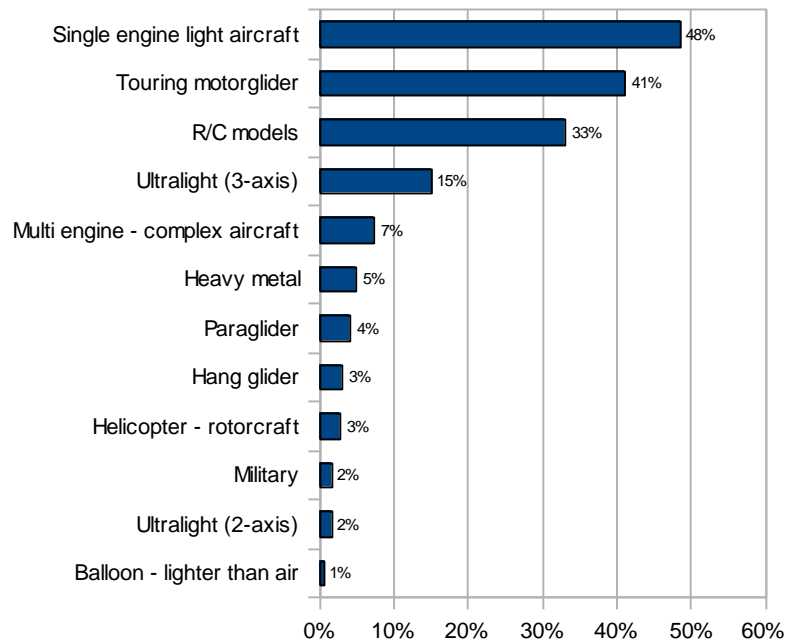
Have you ever participated in a gliding competition?



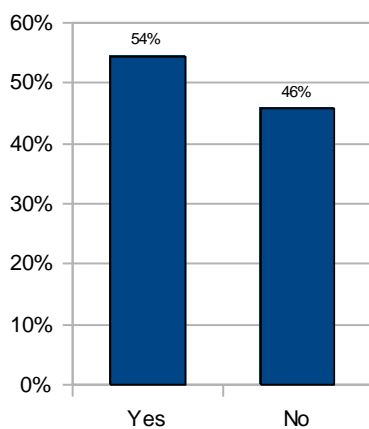
Do you regularly participate in gliding competitions?



What do you fly, if yes?



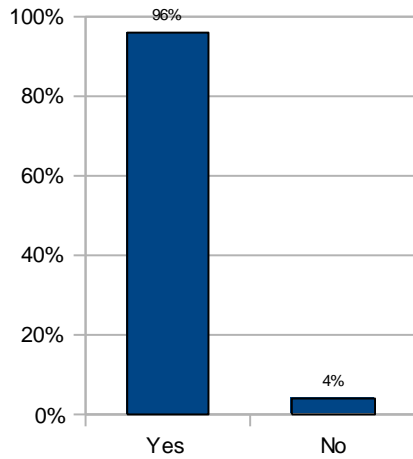
Do you fly anything other than a glider?



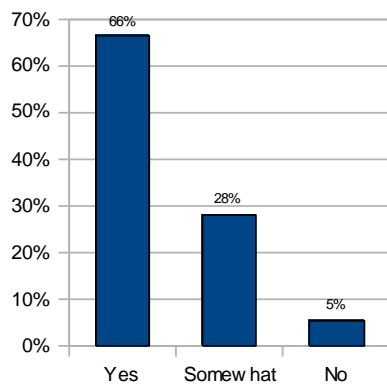
4. Clubs

This section covers information on the airfields and clubs.

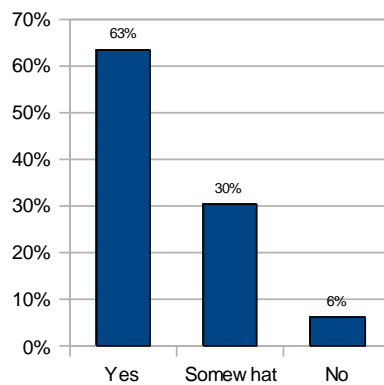
Are you a member of a club?



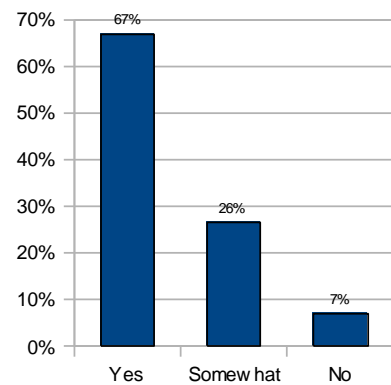
Are you satisfied with the facilities of your club?



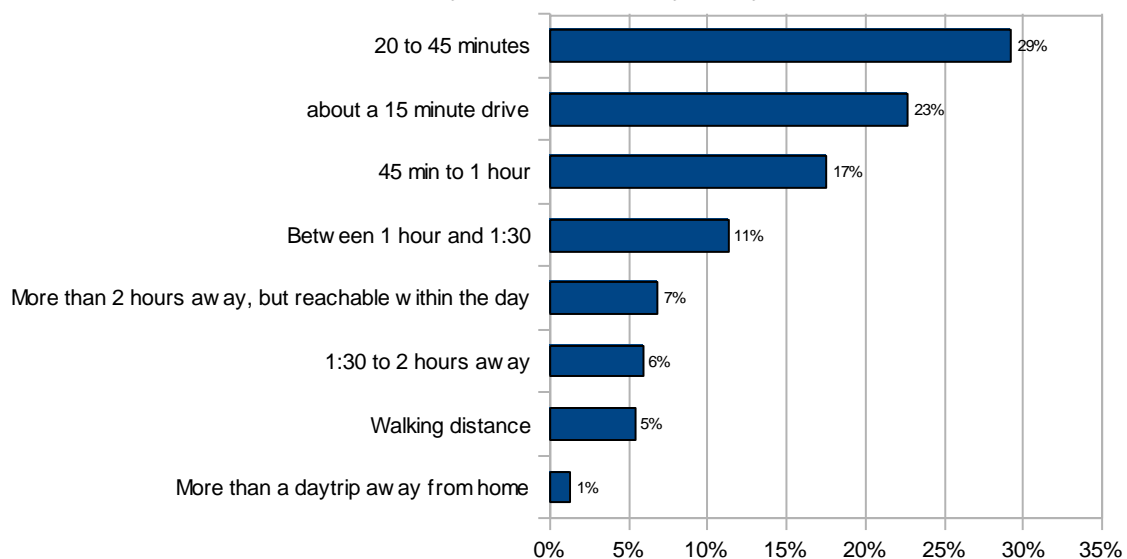
Are you satisfied with the operation of your club and support provided?



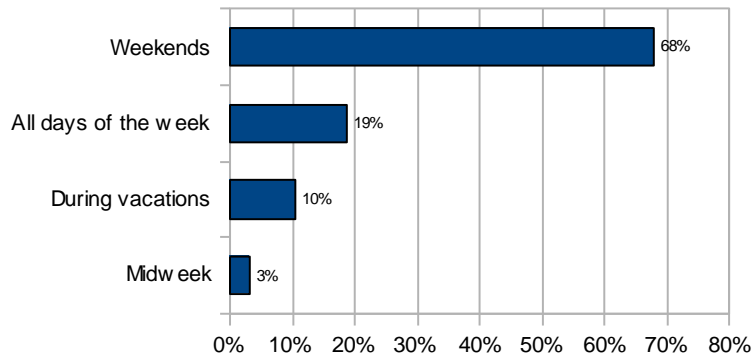
Are you satisfied with the atmosphere of your club?



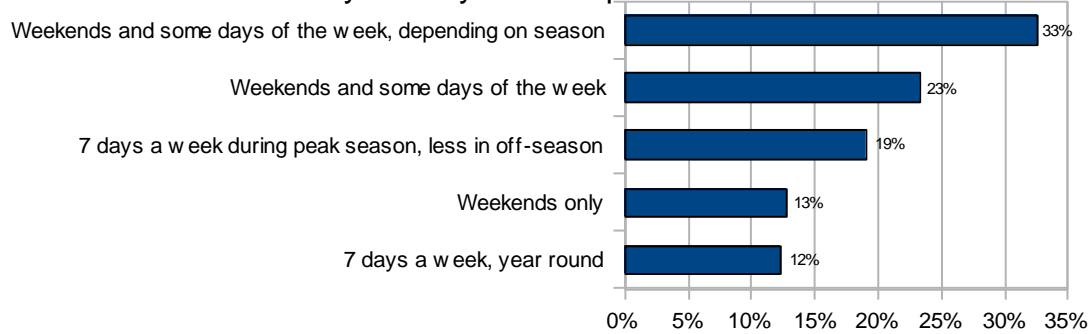
How far away is the airfield you fly from?



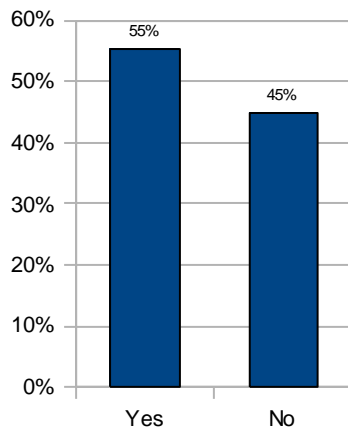
When do you do most of your flying?



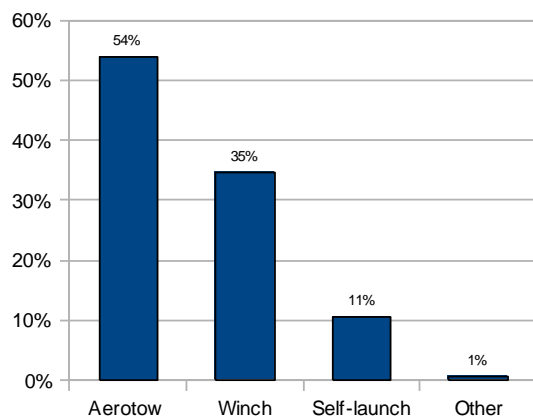
What days does your club operate?



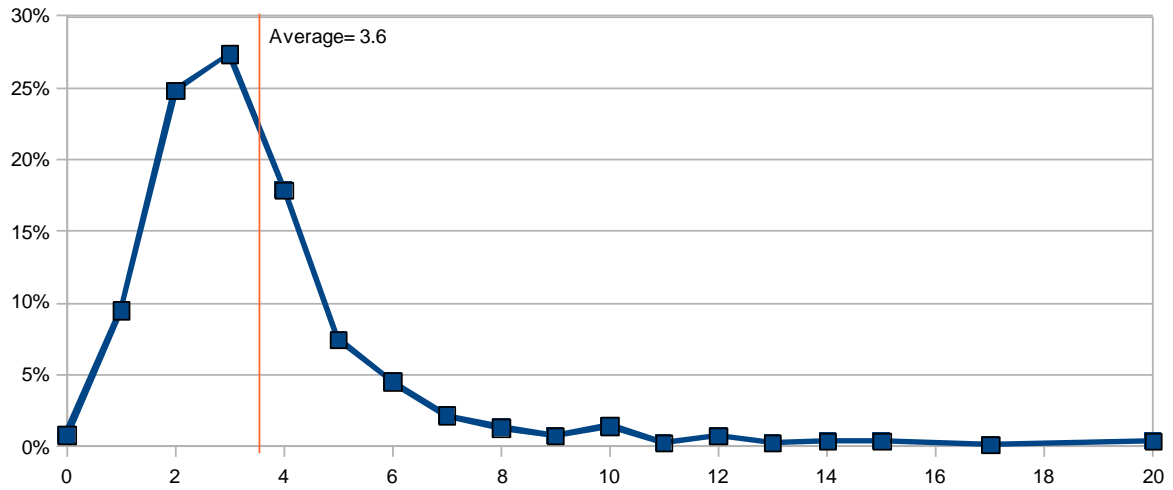
Does your club operate year-round?



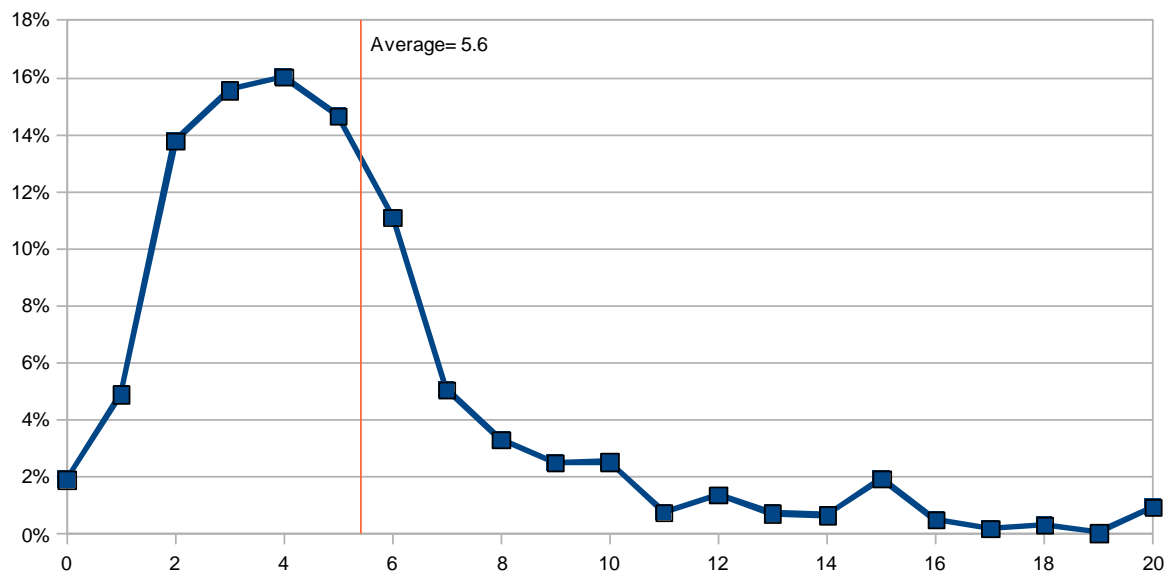
Club launch methods



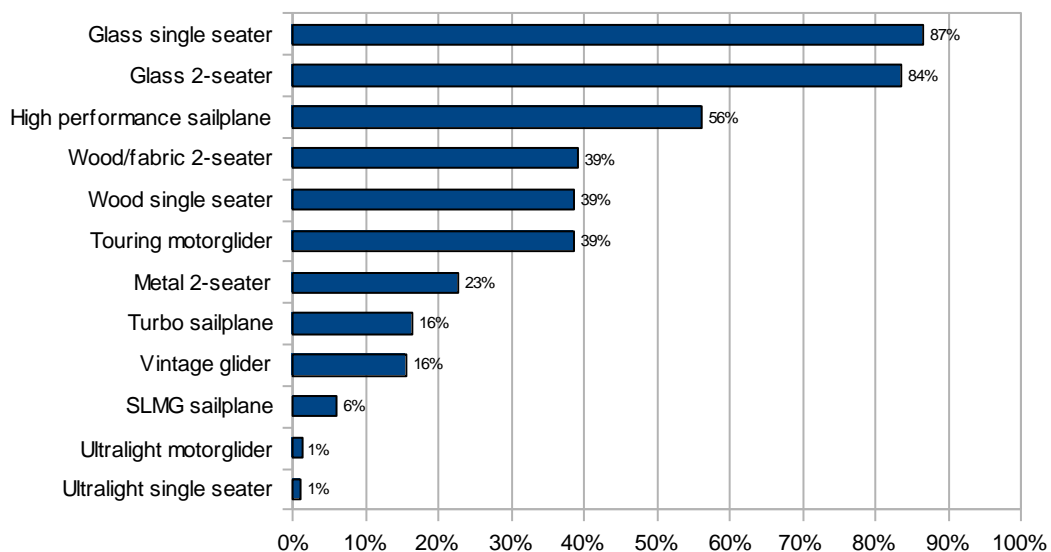
How many two seater gliders does your club have?



How many single seaters does your club have?

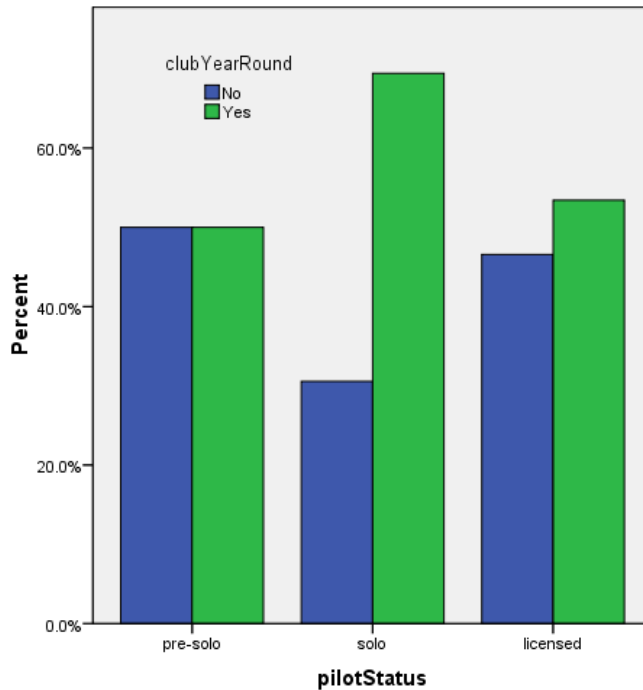


What types of gliders does your club have?



Analysis of the responses suggest the following:

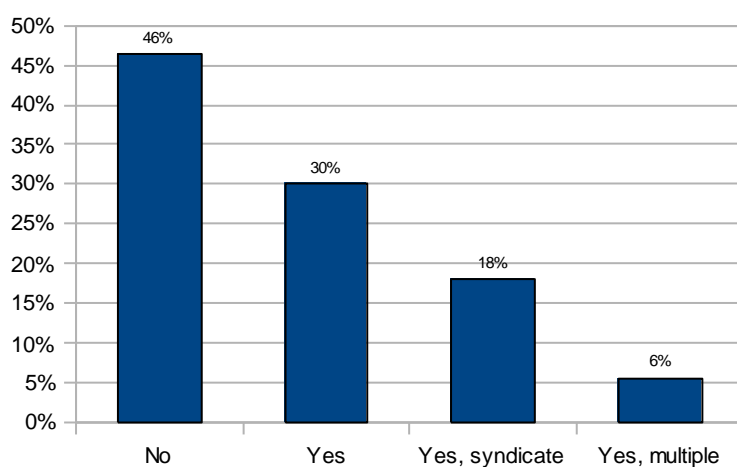
- A good atmosphere at a club is more related to the quality of club operation rather than the club facilities available
- Clubs operating year round have more solo student pilots. In fact, from the club metrics measured, this seems to be the only significant factor in determining solo student population. Year-round operations do not seem to significantly influence the amount of licensed or pre-solo pilots, however.



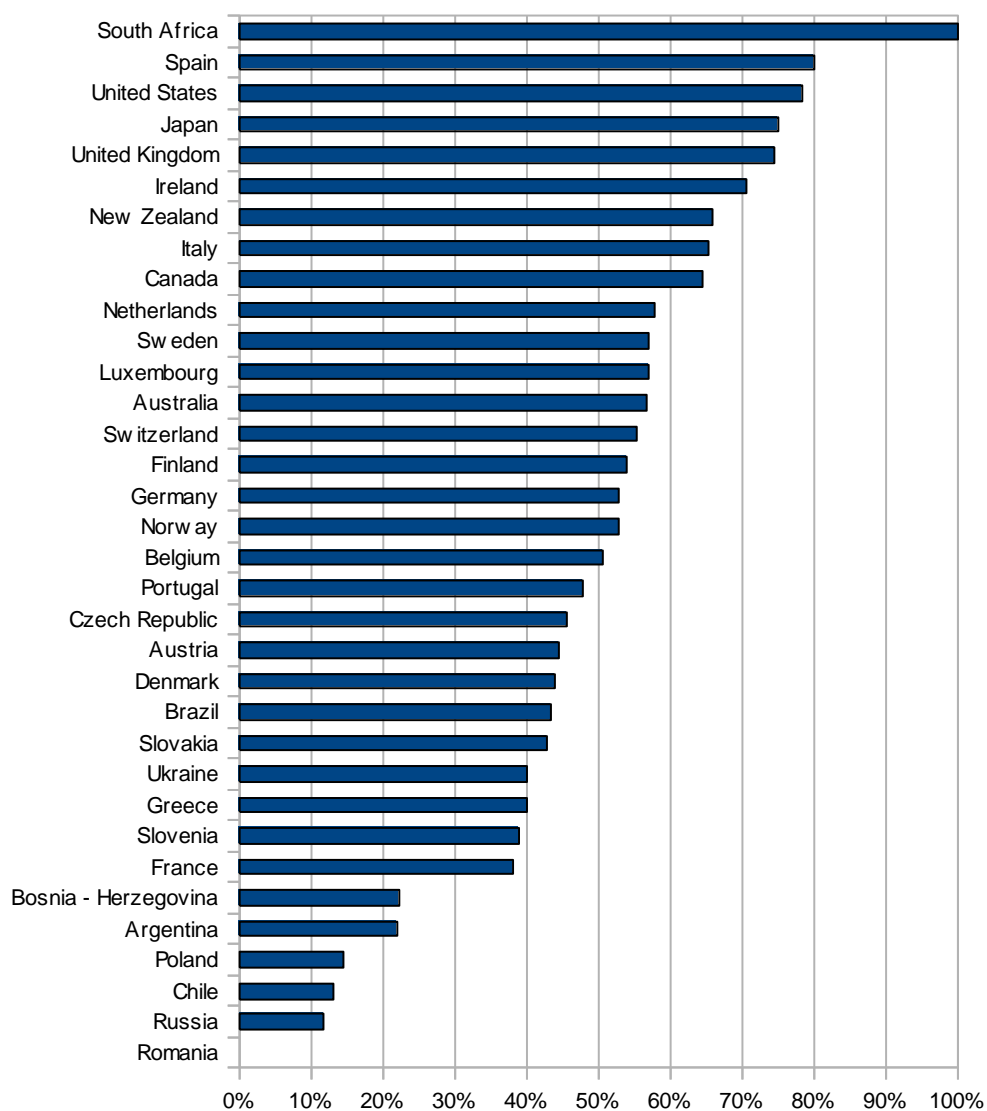
5. Glider ownership

This section covers issues relating to private glider ownership.

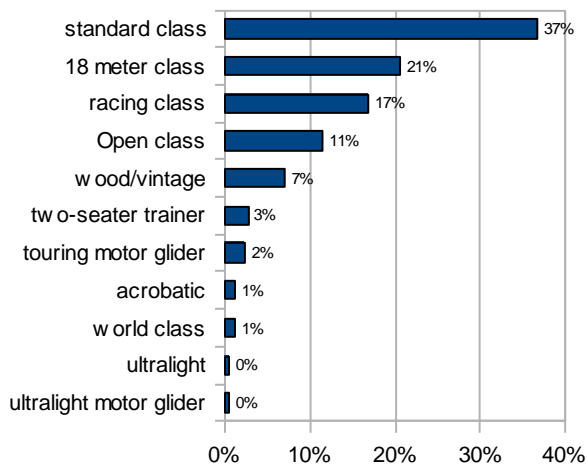
Do you own a glider?



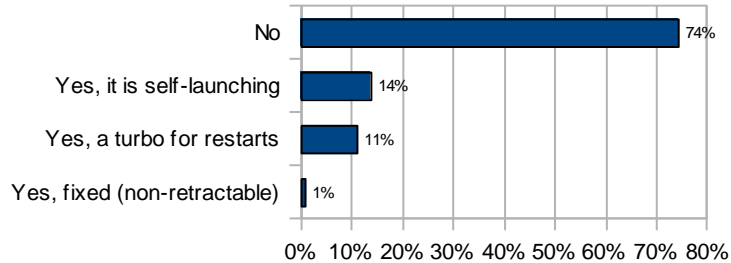
Private glider ownership



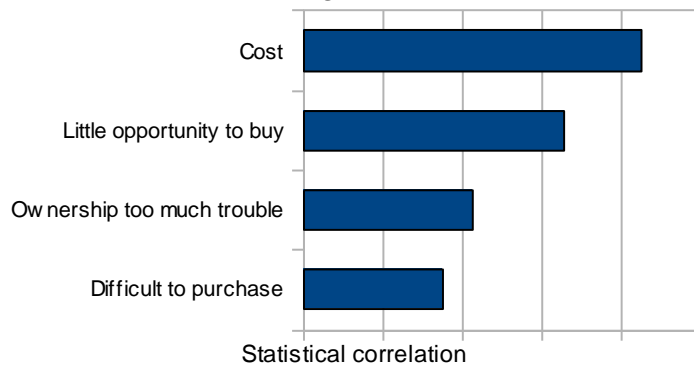
What type of glider do you own?



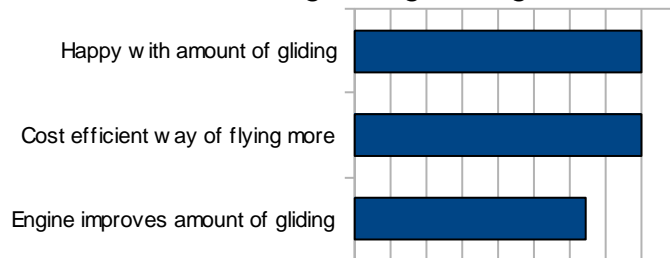
Does it have an engine?

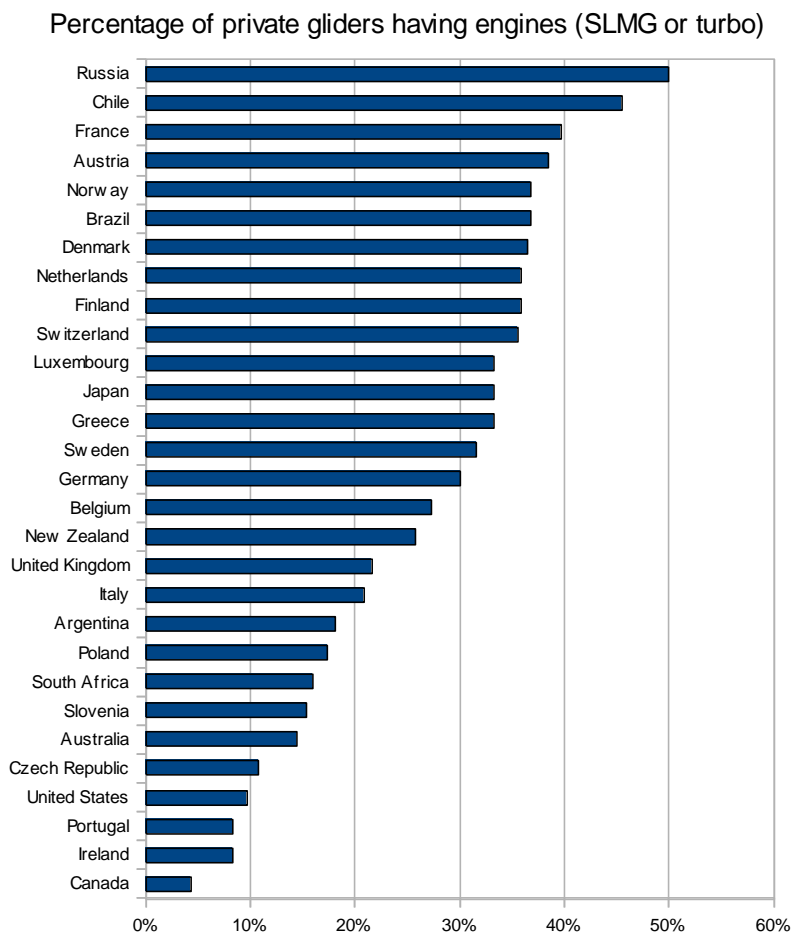


Barriers to glider ownership



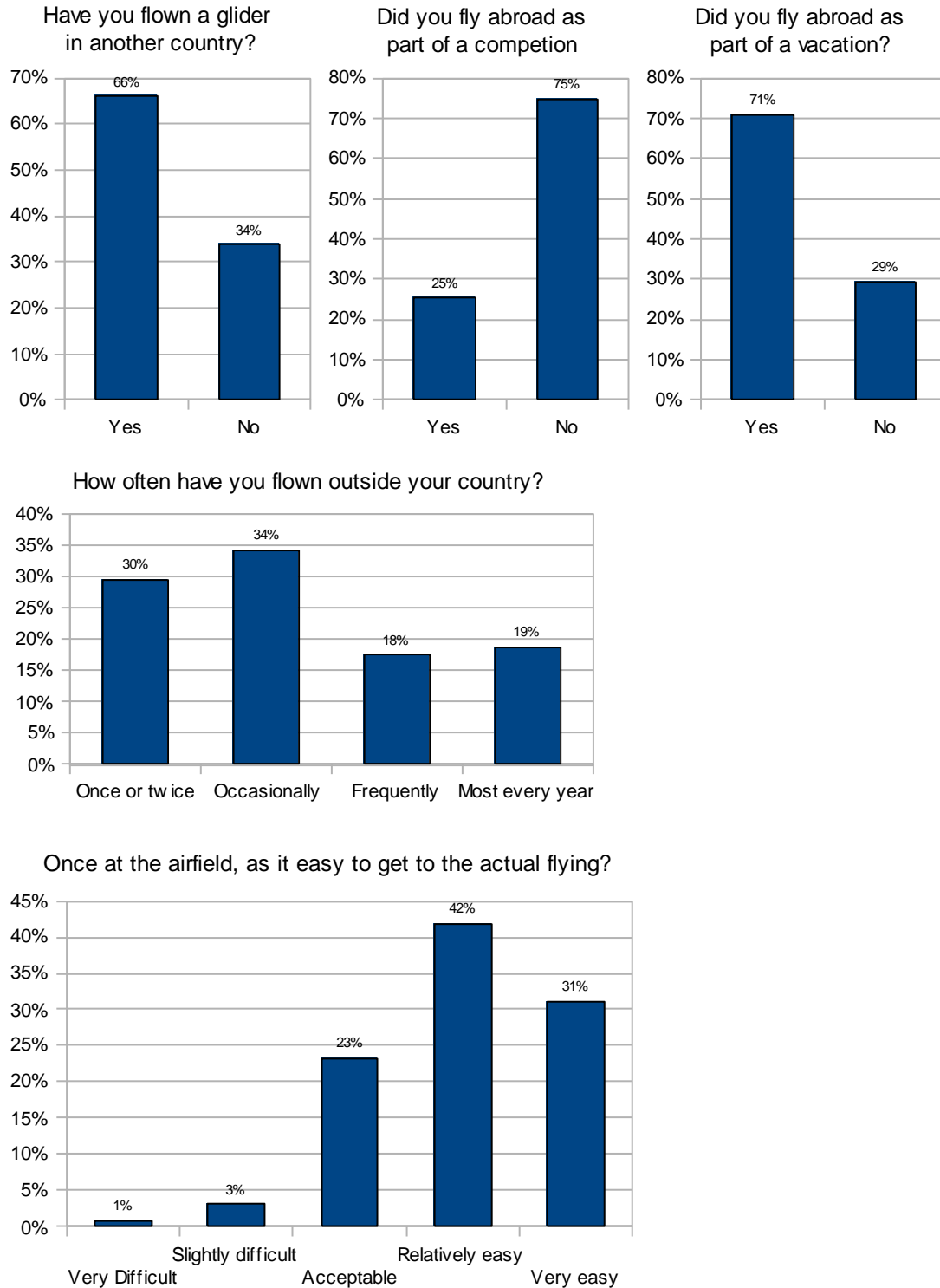
Factors relating to engine in glider



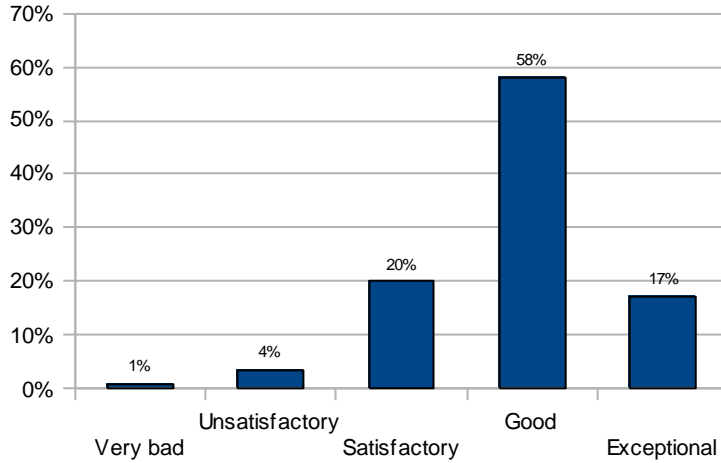


6. Travel abroad

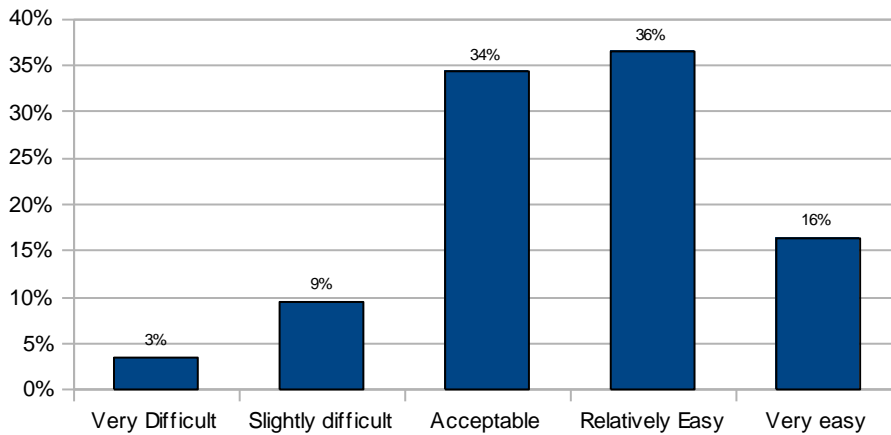
The respondents were asked about their experiences relating to from countries outside their base.



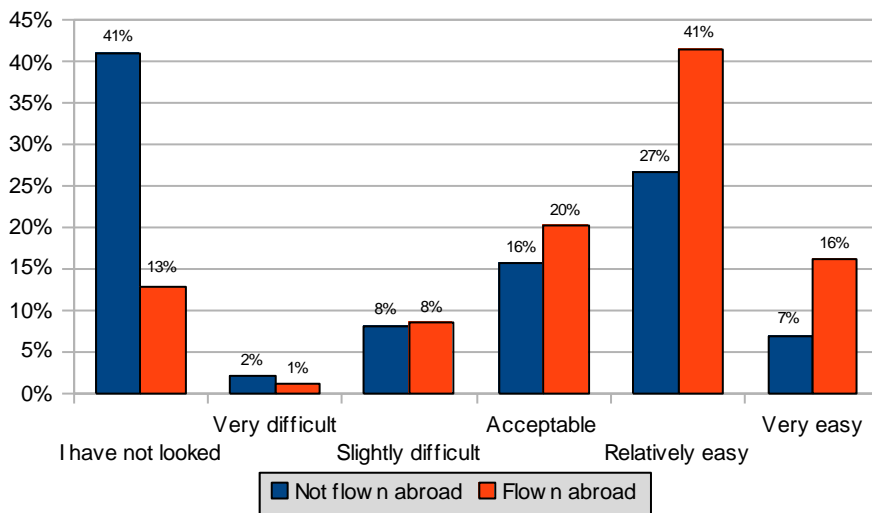
How would you rate your experience(s) of flying abroad?

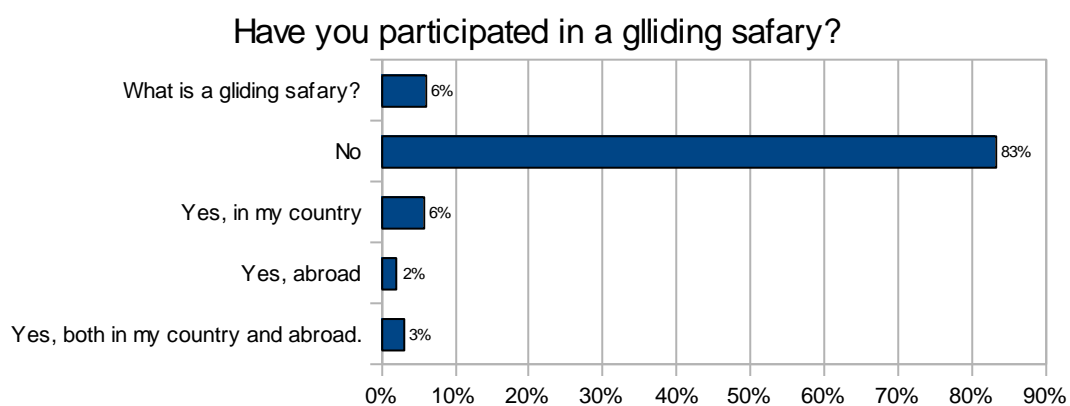
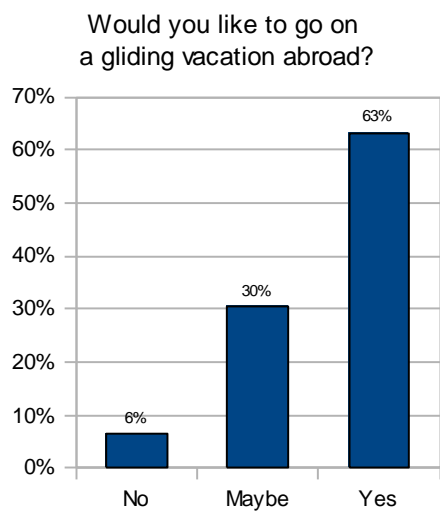


Ease of securing information and making arrangements for foreign travel (pilots traveling abroad)

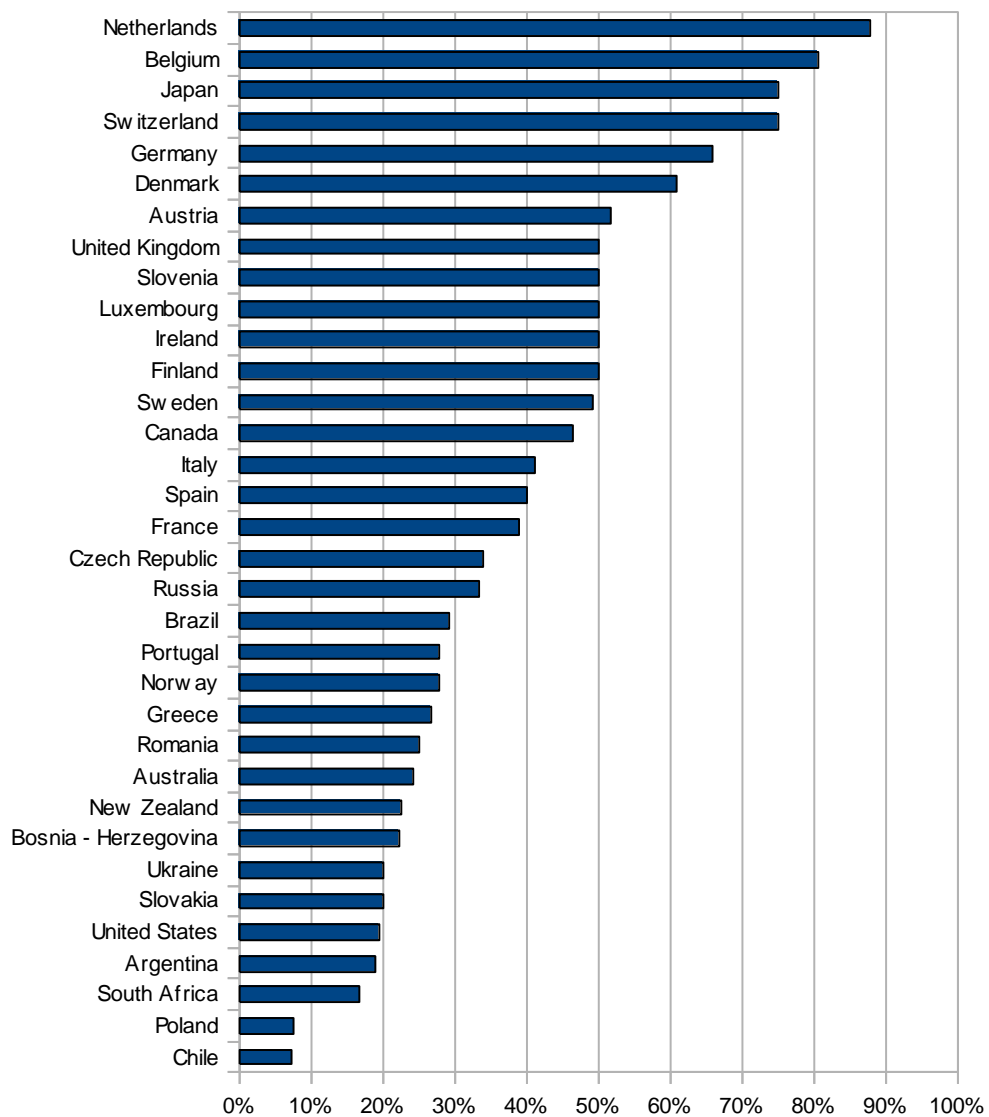


Ease of finding information for gliding abroad

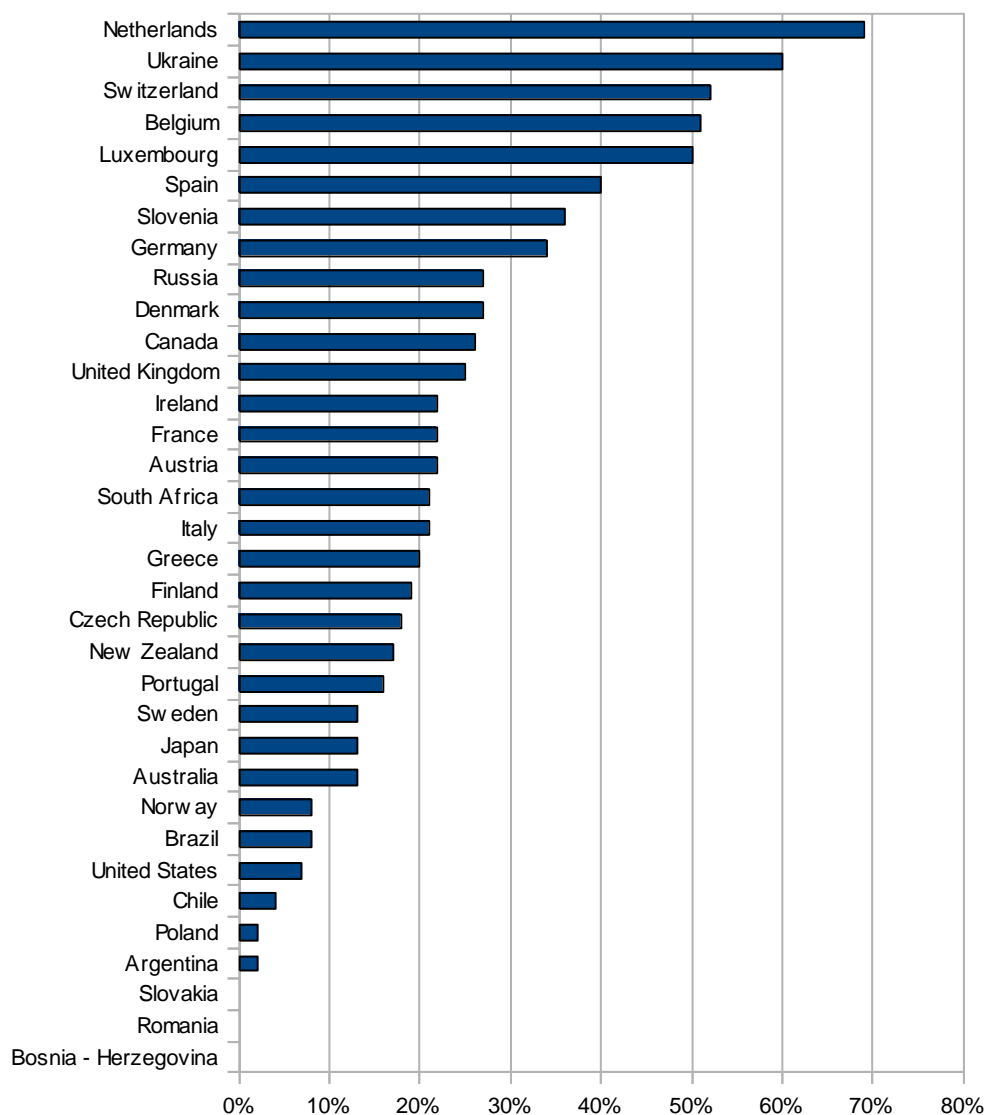




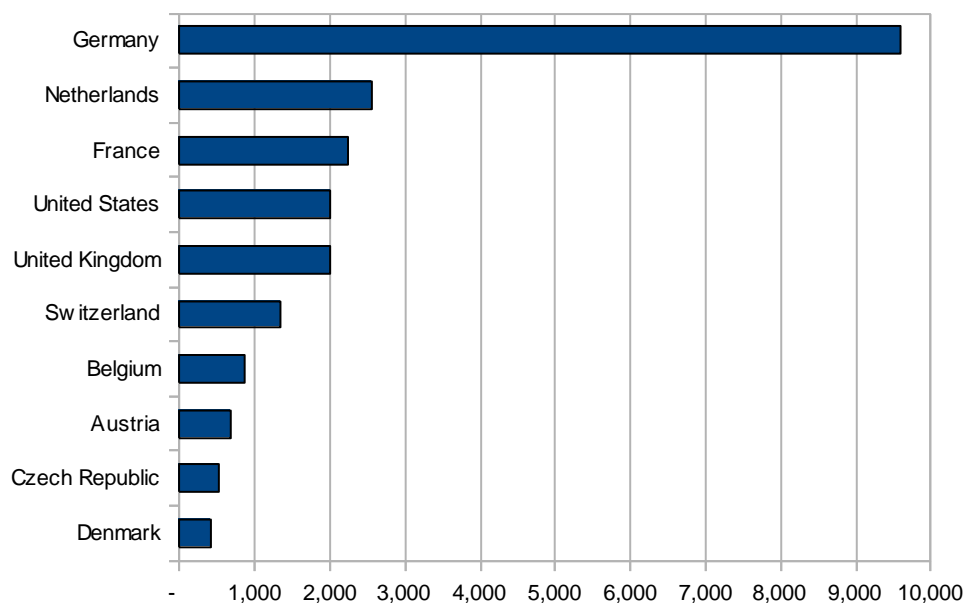
Pilots having vacationed abroad



Pilots flying frequently abroad

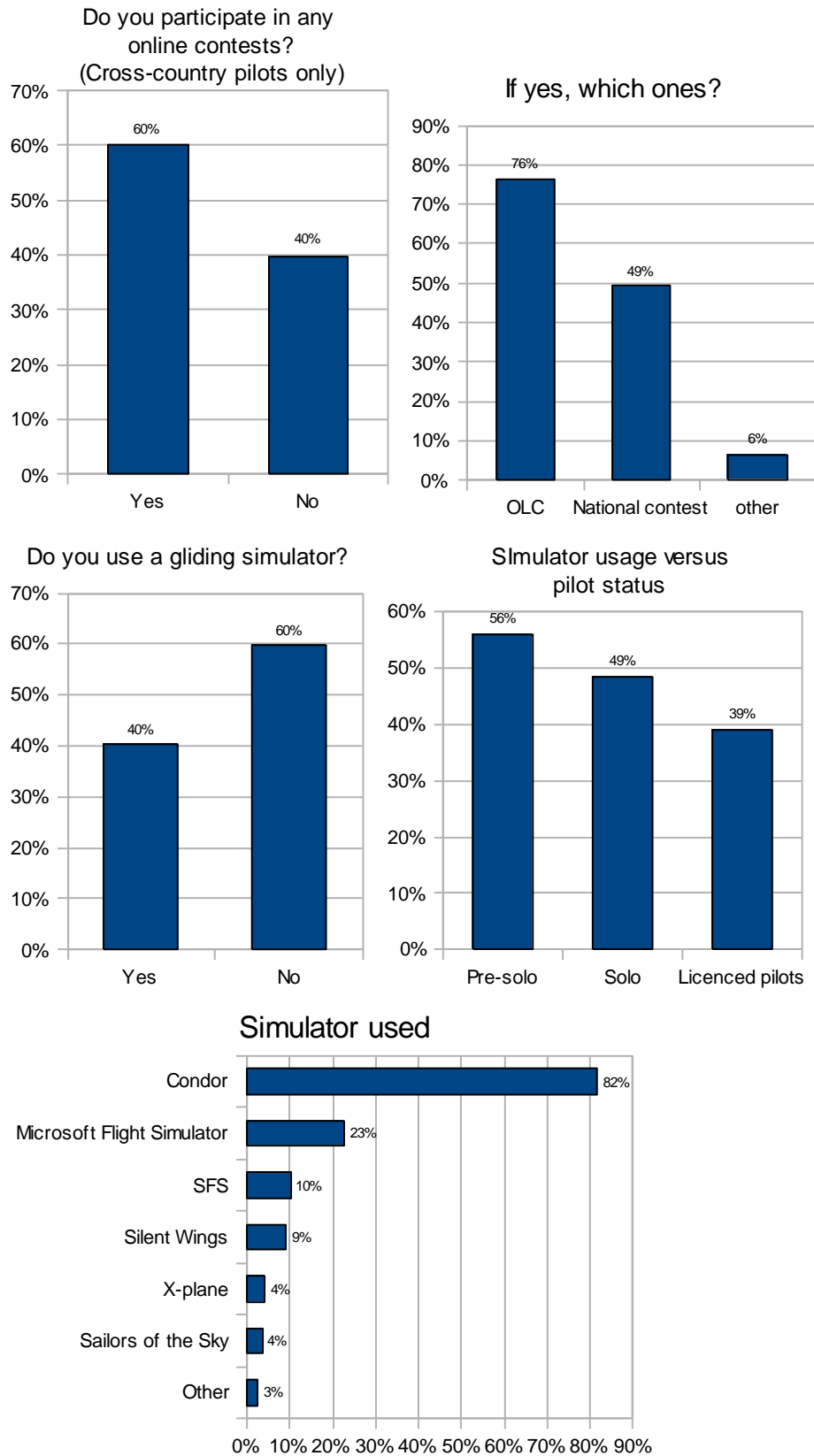


Projected number of pilots flying abroad frequently (Top 10)

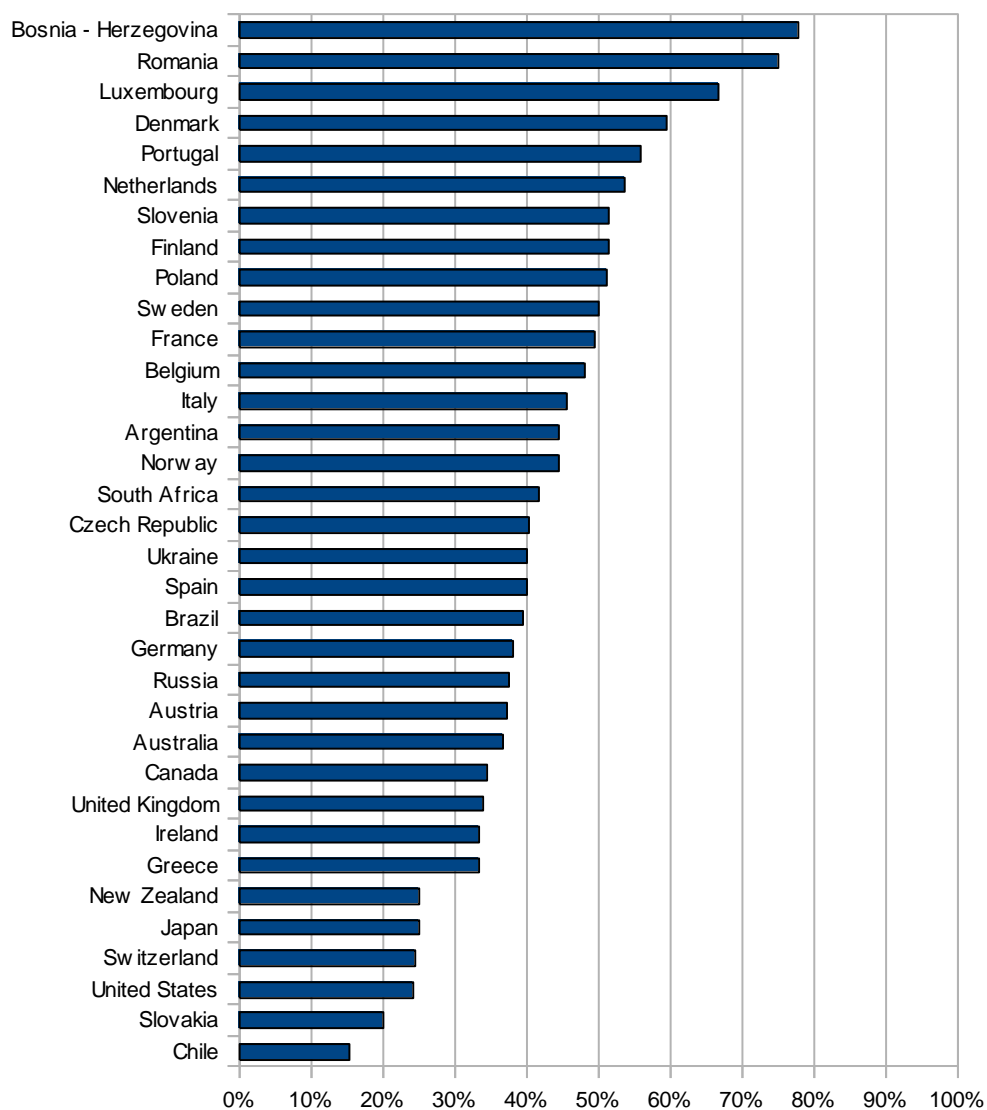


7. Online activity

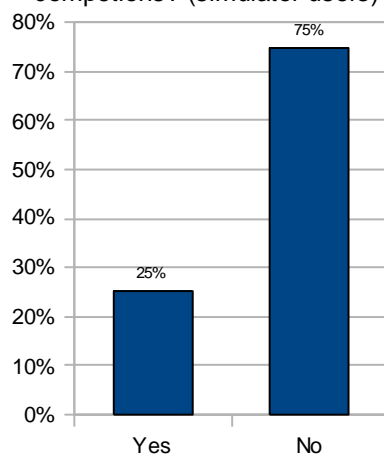
Respondents were asked about their use of simulators and their participation in online contests.



Simulator use



Do you fly virtual online competitions? (simulator users)



By comparing the number of respondents that indicate that they participate in online contests with the actual number of pilots¹ that post their flights online, we can project the possible number of cross-country pilots per country:

Country	Percentage participate online	Actual number participating online	Projected total number of cross country pilots	Membership declared by NAC	Cross country pilots as a percentage of membership
Argentina	31.8%	120	377	165	229%
Australia	42.5%	253	595	2436	24%
Austria	83.3%	489	587	3458	17%
Belgium	57.1%	91	159	1713	9%
Bosnia - Herzegovina	20.0%	1	5	-	-
Brazil	52.6%	99	188	-	-
Canada	72.7%	284	391	1075	36%
Chile	45.7%	38	83	152	55%
Croatia	50.0%	16	32	148	22%
Czech Republic	93.8%	155	165	3240	5%
Denmark	41.4%	346	836	1683	50%
Finland	60.3%	120	199	2244	9%
France	55.8%	3239	5810	11643	50%
Germany	90.8%	8163	8990	30792	29%
Greece	63.6%	9	14	95	15%
Italy	56.9%	259	455	1734	26%
Japan	14.3%	33	231	663	35%
Luxembourg	60.0%	25	42	35	119%
Netherlands	75.6%	540	714	3825	19%
New Zealand	31.0%	28	90	797	11%
Norway	52.0%	53	102	1332	8%
Poland	37.5%	46	123	2274	5%
Portugal	40.0%	6	15	70	21%
Russia	15.4%	6	39	250	16%
Slovakia	80.0%	63	79	715	11%
Slovenia	85.3%	93	109	557	20%
South Africa	60.9%	37	61	582	10%
Spain	75.0%	115	153	514	30%
Sweden	75.9%	244	321	2321	14%
Switzerland	67.4%	505	749	2813	27%
United Kingdom	30.1%	661	2195	7811	28%
Ukraine	50.0%	5	10	-	-
United States	65.9%	813	1234	29192	4%
		TTL	25,155		

¹ See Cross-country soaring report 2008, Country Development working group.

8. Issues

Respondents were asked about their experiences as glider pilots. They were asked to rank a number of statements relating to issues, on a scale of 1 to 5, with 1 indicating "I strongly disagree" and 5 "I strongly agree".

The mean response to each question, for the entire sample, can be found on page 31.

The main purpose of this section of the questionnaire was to identify the similarities and differences in the experiences of pilots in different countries. The first step in analyzing the results was to examine whether indeed one can make some sense of all the information presented. Factor analysis was employed to indicate whether the responses obtained grouped into any specific patterns.

The results of this analysis suggest that the responses given group into a number of categories of issues, or *factors*:

- Barriers to cross-country flight
- Airspace and regulatory issues
- Barriers to glider ownership
- Quality of club fleet
- Difficulty of progress in training
- Social and time constraints imposed on gliding
- Politics and regulation of gliding
- Engines in gliders
- Difficult of recruitment of new pilots

Of these factors the most resonant, i.e. statistically significant were "barriers to cross-country flight" and "airspace and regulatory issues", with the first of the two explaining the largest amount of variance.

Of the questions² asked, the following were found to be statistically significant components for each factor:

Barriers to cross-country flight	Factor loading
I wish there were more expert cross-country pilots to fly with, in my area.	.712
I wish there was more opportunity to take a cross-country flying course where I fly.	.708
There are a lot of times when I would like to fly, but the airfield/club is closed.	.543
I would like to do more training, but it is difficult to secure a lesson as there is too much demand for the resources available.	.522
Knowledge of soaring conditions here is not as good as I would like.	.505

Airspace and regulatory issues	Factor loading
Airspace is restricted around my airfield.	.833
Flying cross-country is too problematic where I fly, due to regulations or ATC.	.712
Gliding activity is restricted by the amount of regulation.	.621
We have problems dealing with the authorities to secure our rights to glide.	.615

² A number of similar questions were used in the design of this section of the questionnaire, as a method of evaluating the accuracy of response on a number of topics. In the factor, similar questions with the least statistical significance were discarded from the final results. This is why some questions do not appear as members of these factors.

Barriers to glider ownership	Factor loading
I would like to buy a glider but cannot afford to.	.748
I would like to be part of a glider syndicate (fractional ownership), but there is not enough opportunity for this where I fly.	.628
Owning your own glider is too much trouble.	.575
I would like to glide more but the cost is prohibitive.	.564
There are good value second-hand gliders available.	-.439

Quality of club fleet	Factor loading
My club has enough single-seater gliders.	.803
My club has enough gliders for training.	.797
There are gliding opportunities for every budget.	.508

Difficulty of progress in raining	Factor loading
It is difficult to reach solo.	.738
It is difficult to get a license.	.686
I would like to do more training, but it is difficult to secure a lesson as there is too much demand for the resources available.	.451

Social and time constraints imposed on gliding	Factor loading
I do not have enough time for gliding.	.763
Family/social constraints limit my gliding.	.696
Gliding takes too much of my time.	.465

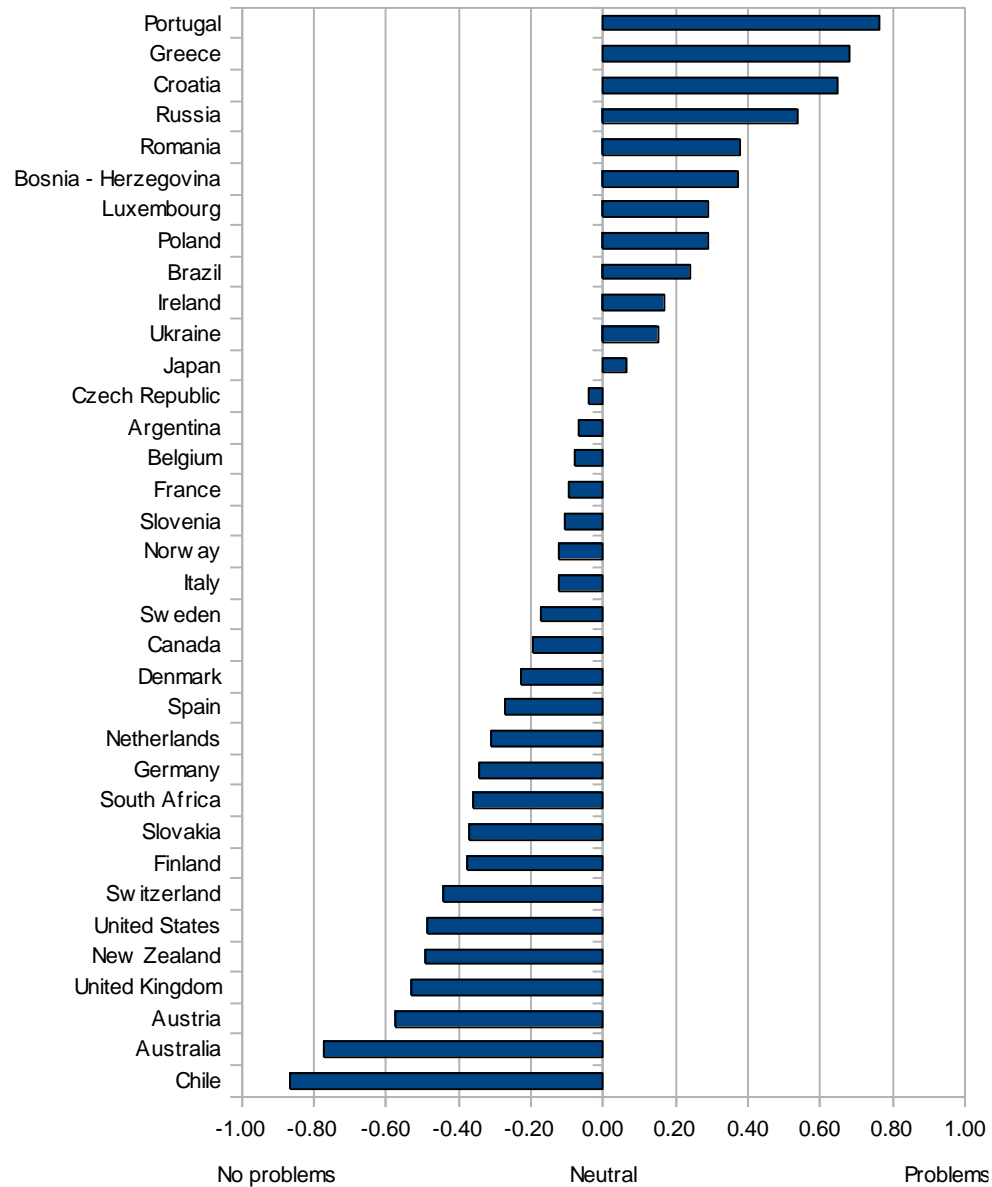
Politics and regulation of gliding	Factor loading
There are too many politics in gliding.	.645
Regulations ensure the safety of flight in a satisfactory way.	-.649
Gliding activity is restricted by the amount of regulation.	.483
We have problems dealing with the authorities to secure our rights to glide.	.412

Engines in gliders	Factor loading
I do not believe gliders with engines (turbo-slmg) have a place in 'real' gliding.	-.760
I think a turbo or SMLG glider would (does) improve the amount of flying I do.	.726

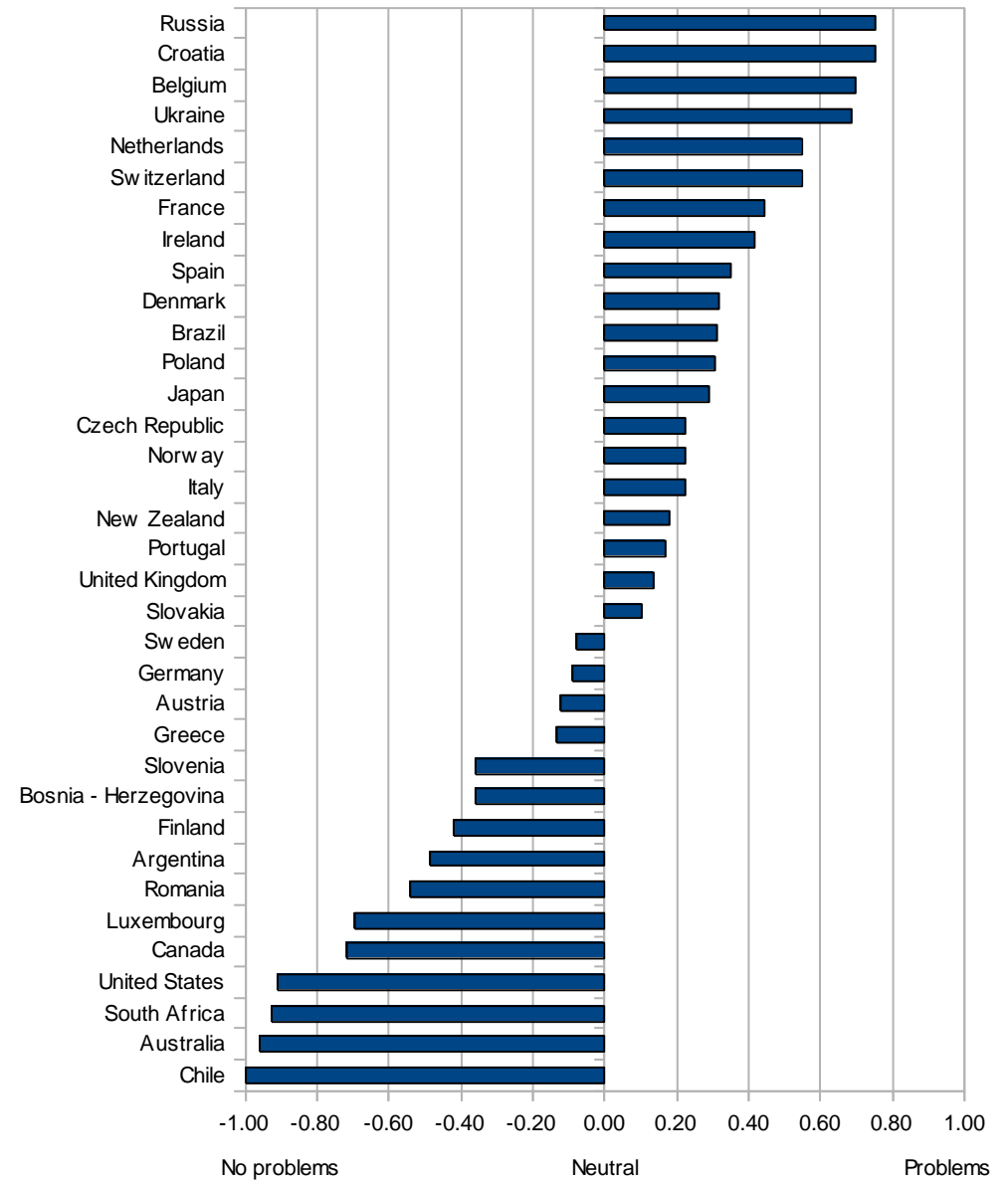
Difficult of recruitment of new pilots	Factor loading
It is difficult to recruit new participants to our sport.	.696

An analysis of how these factors resonate in each country follows. Please note that the charts are rated on a scale of -2.00 to +2.00, with -2 indicating complete disagreement, 0 neutral opinion and +2 complete agreement.

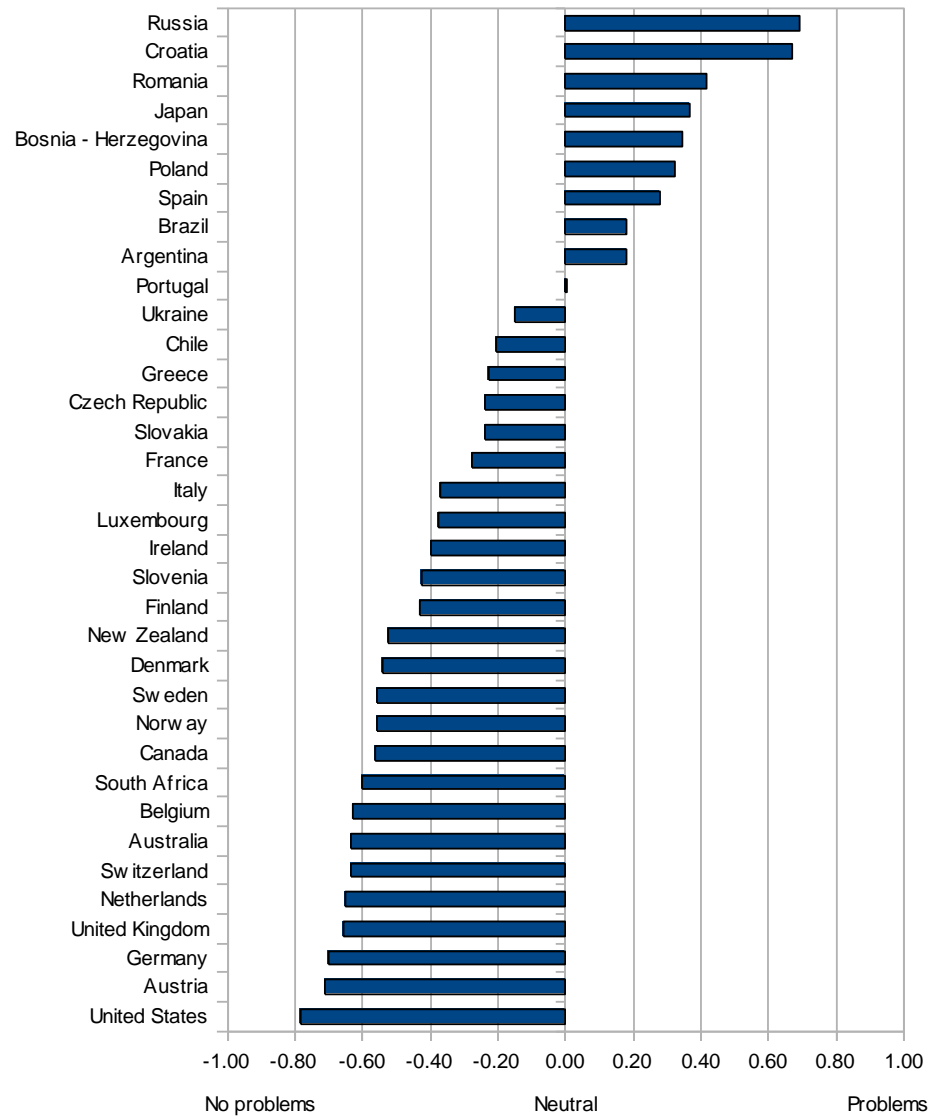
Barriers to cross-country flight



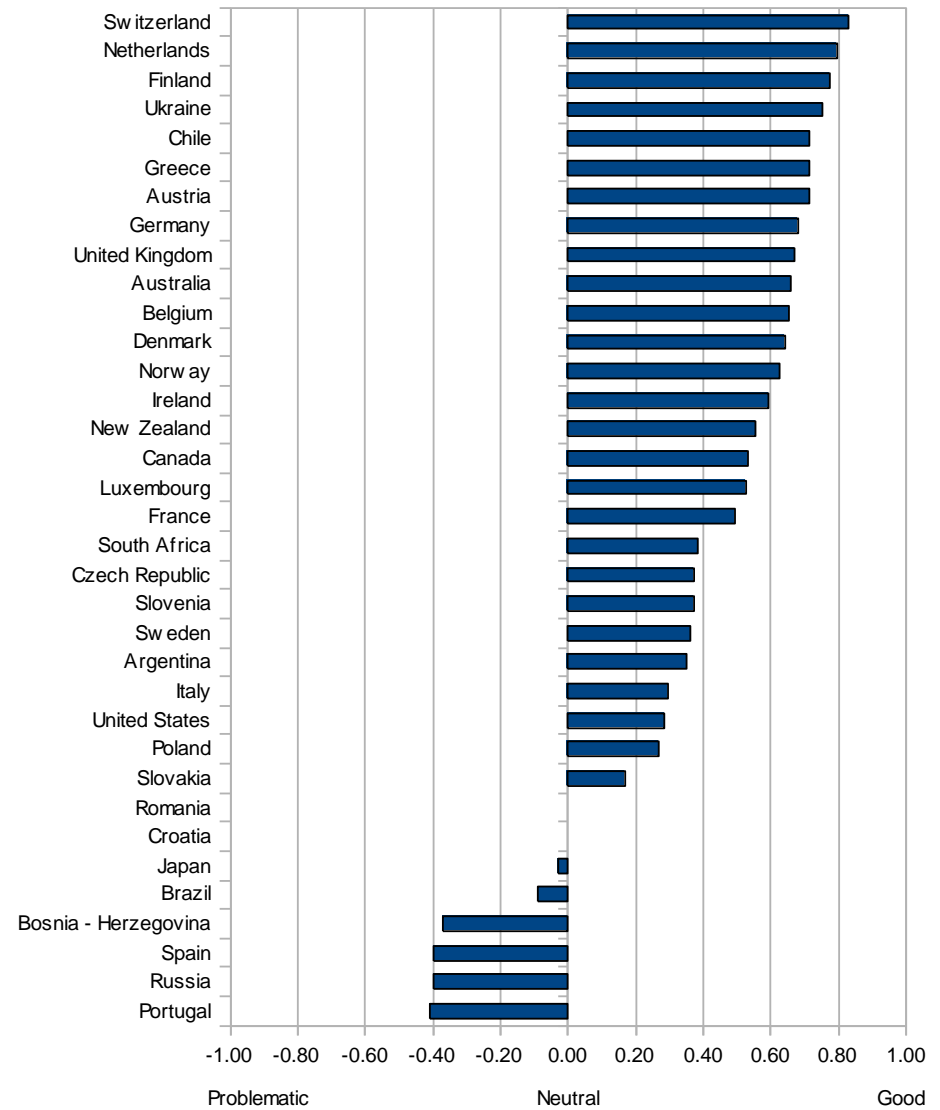
Airspace & regulatory issues



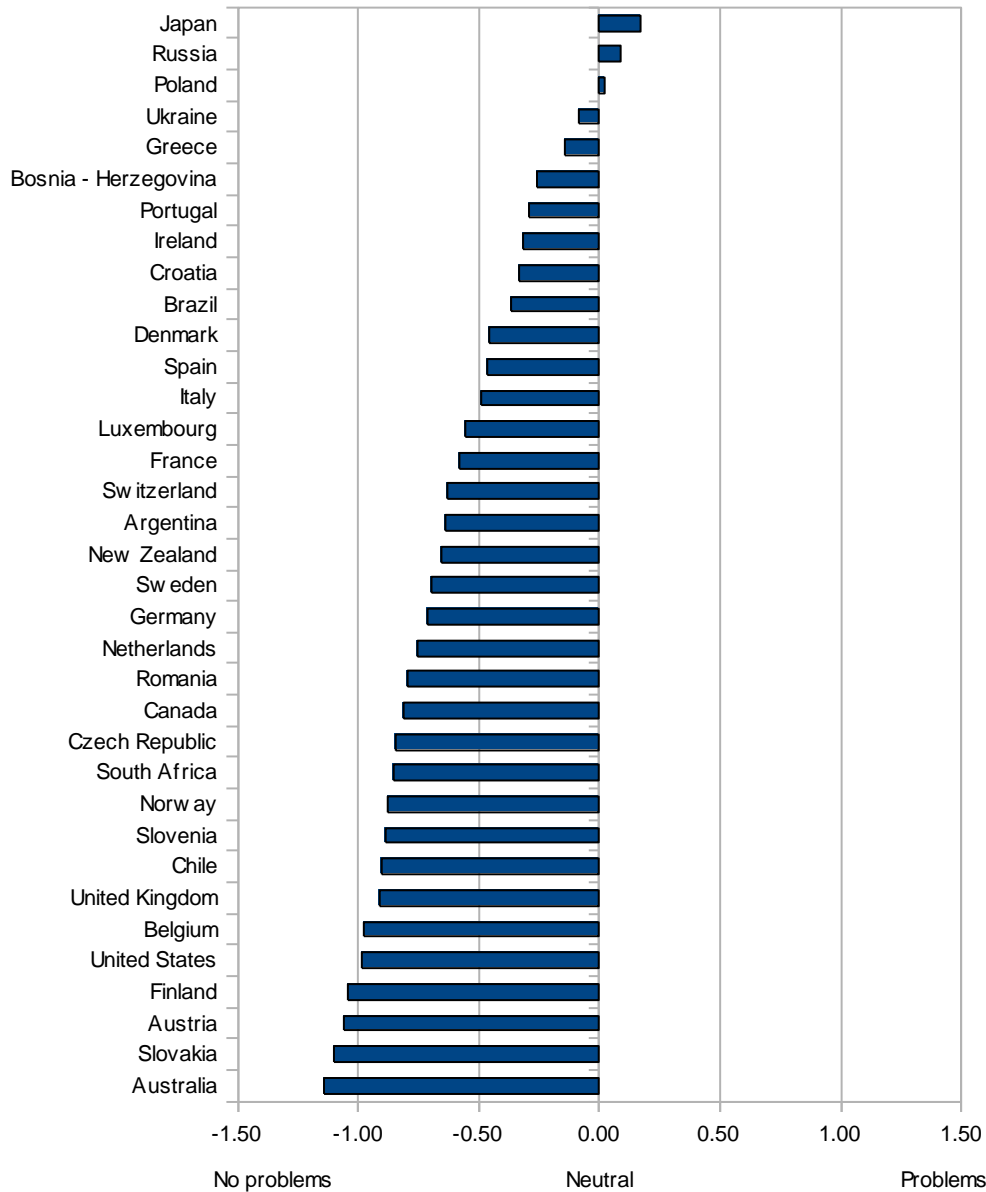
Barriers to glider ownership



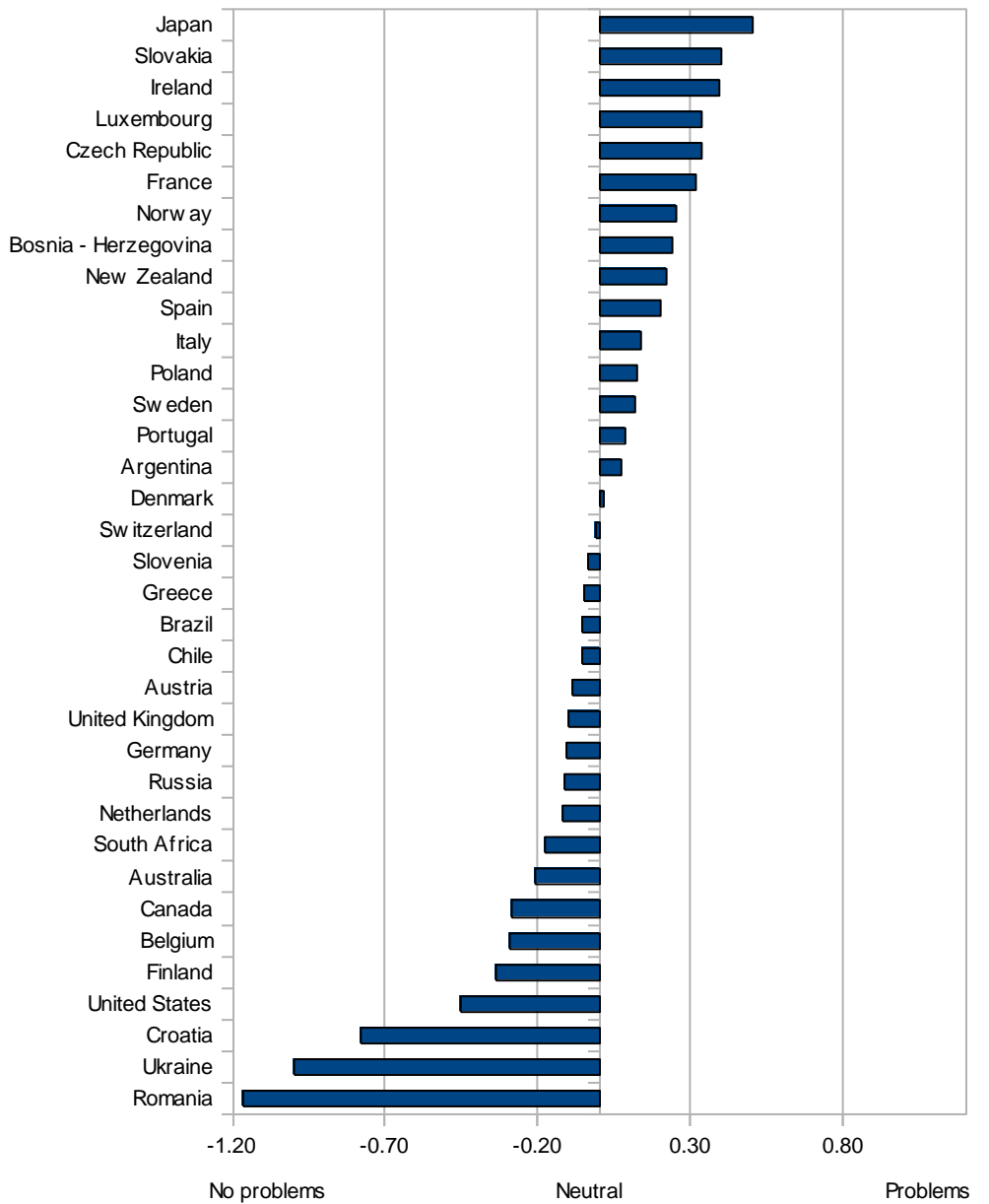
Club fleet



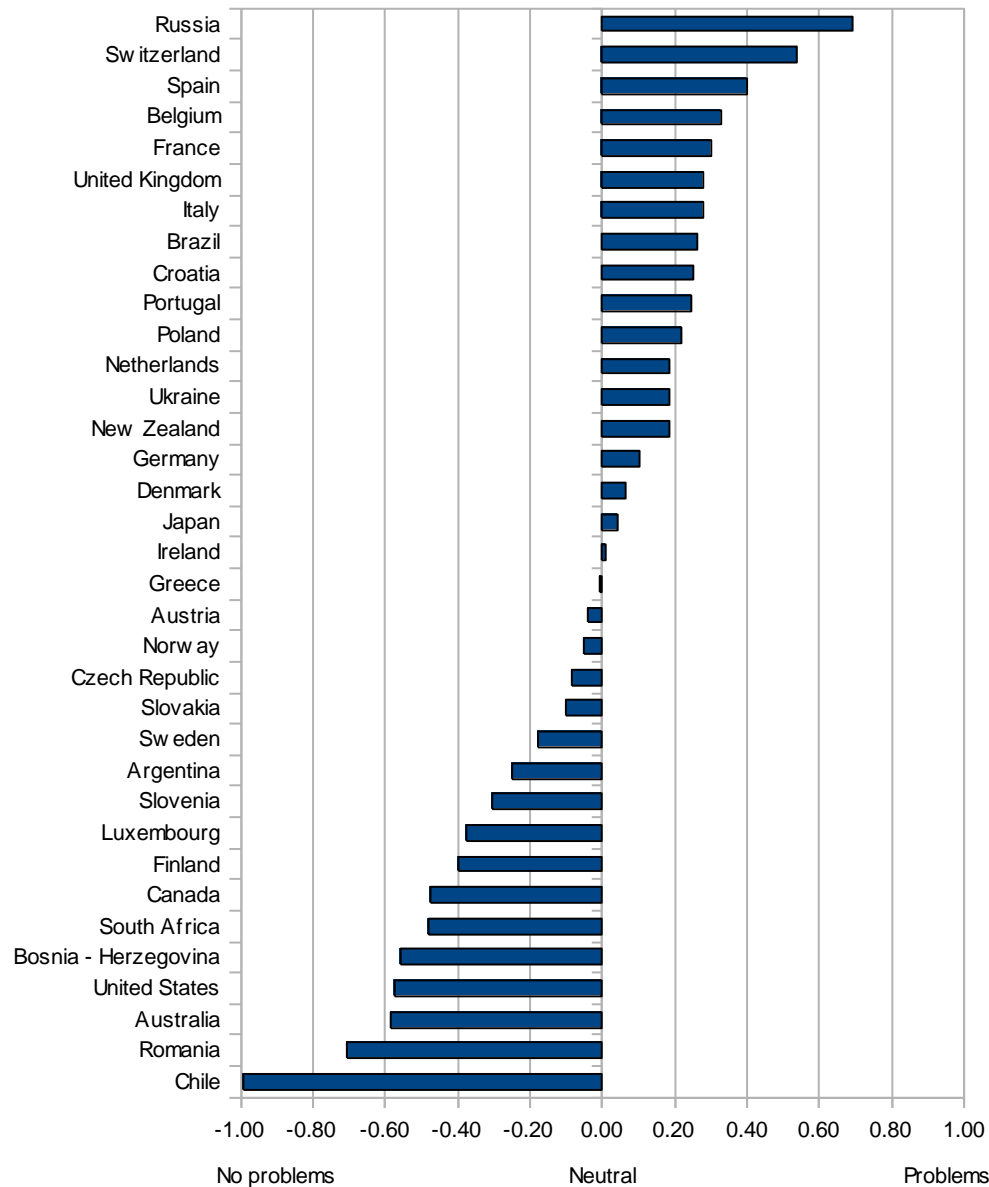
Difficulty of progress in training



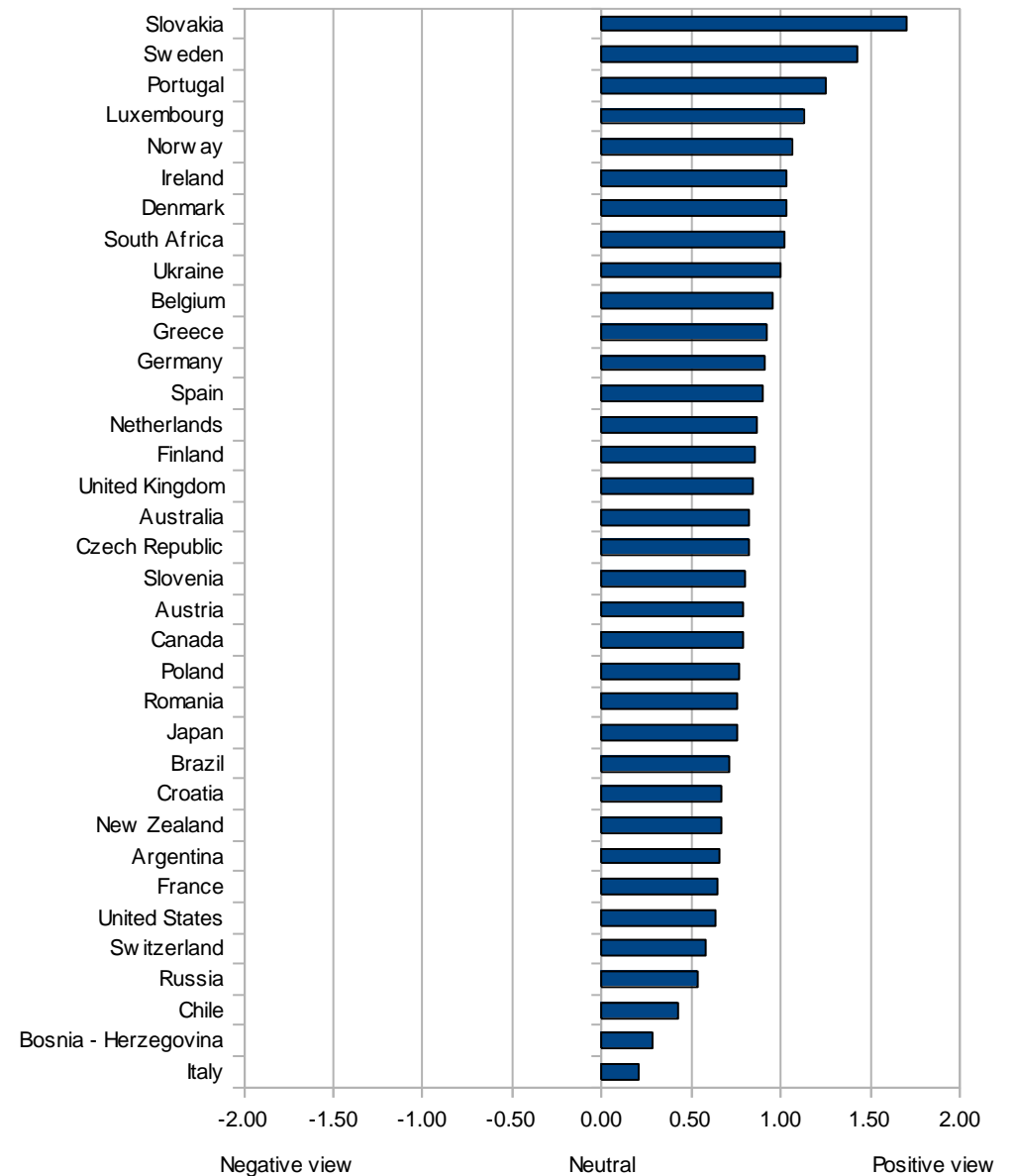
Time & social constraints



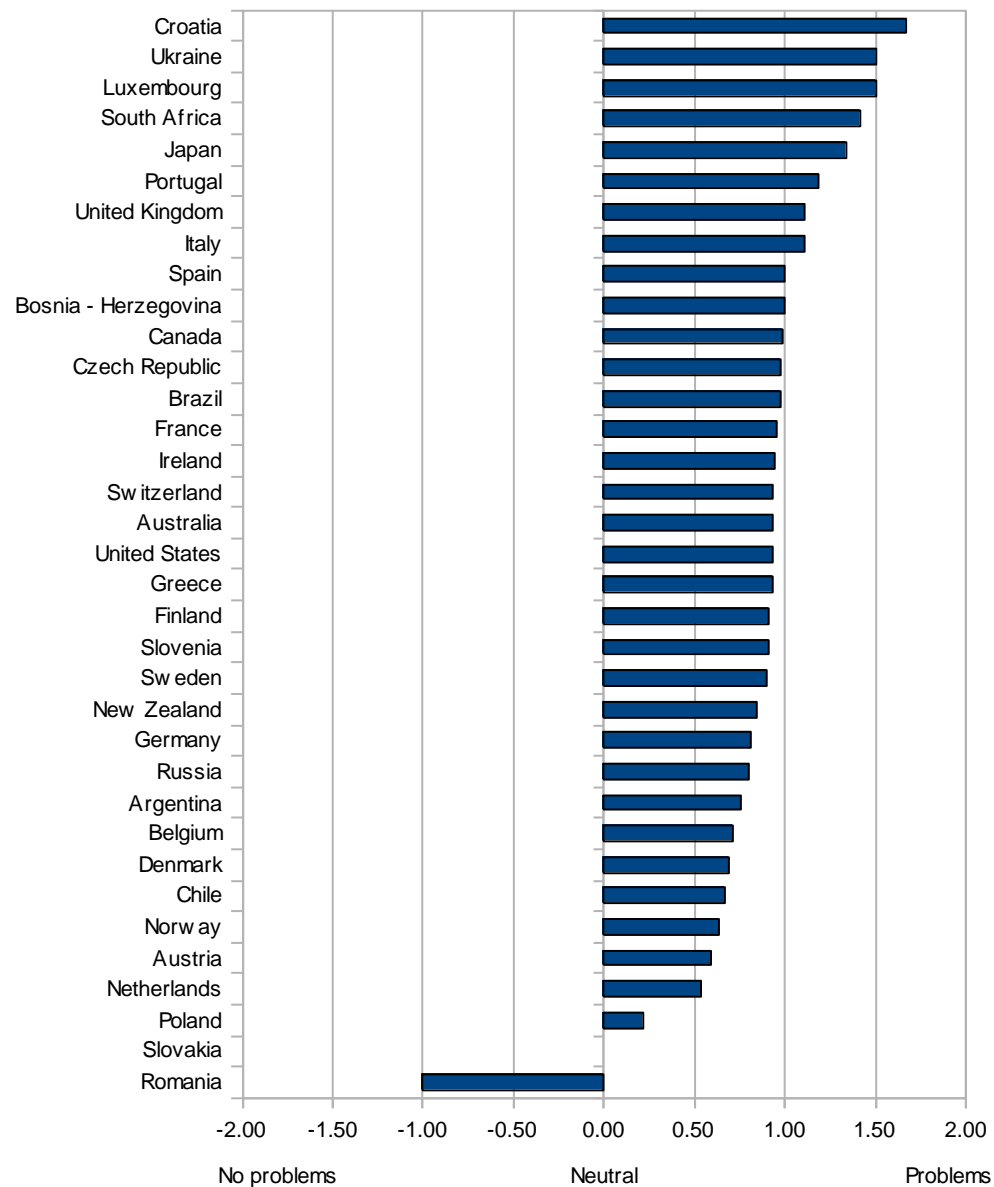
Politics & regulation



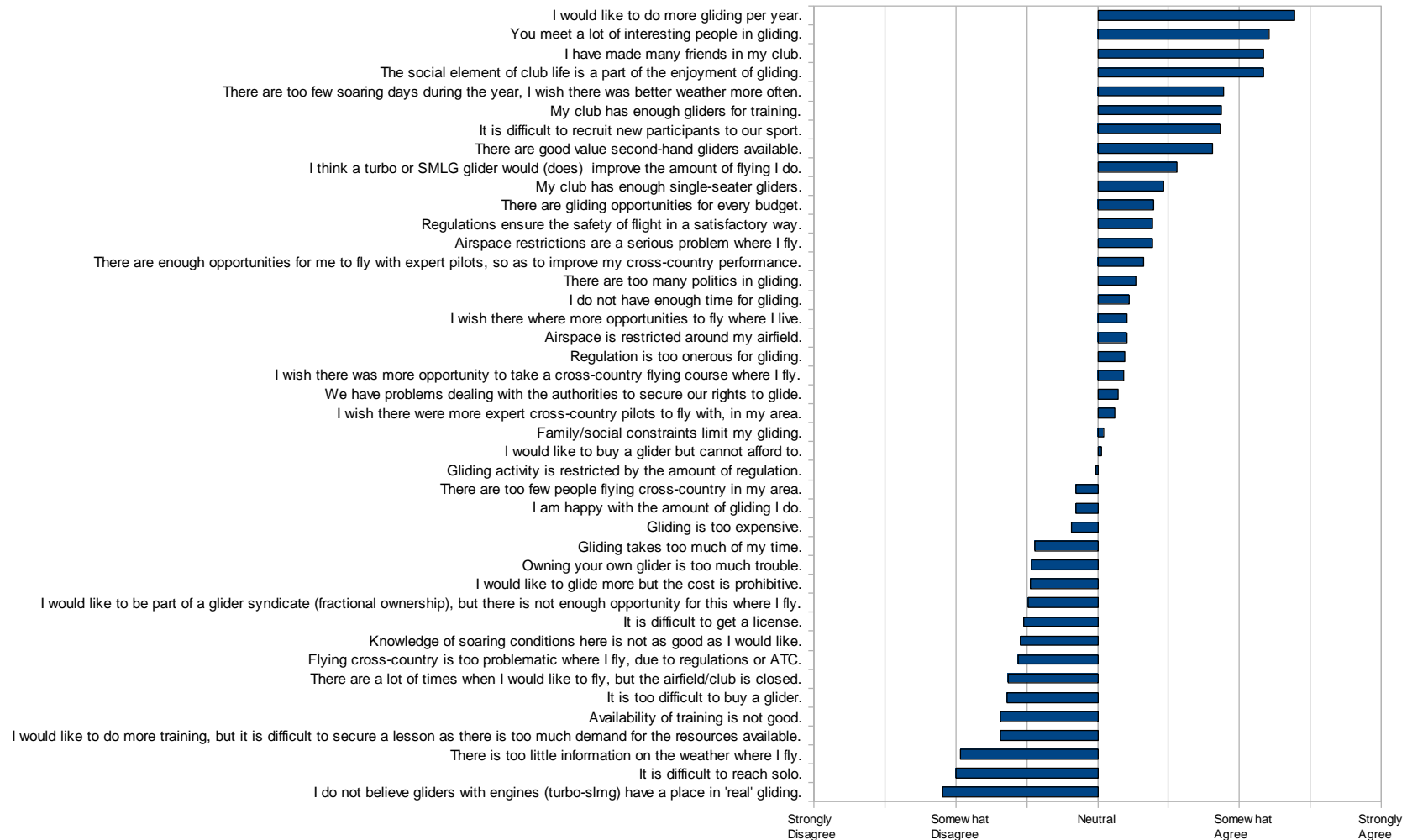
Engines in gliders



Recruitment difficulty



Issues



In general, the issues in which there seems to be universal agreement across groups are the following:

- Everyone would like to do more gliding
- The social element of gliding is important and one is likely to meet interesting people and make many friends
- Gliders with engines have a place in 'real' gliding
- Availability of second hand gliders is not limited
- There is some difficulty in recruiting new participants in our sport

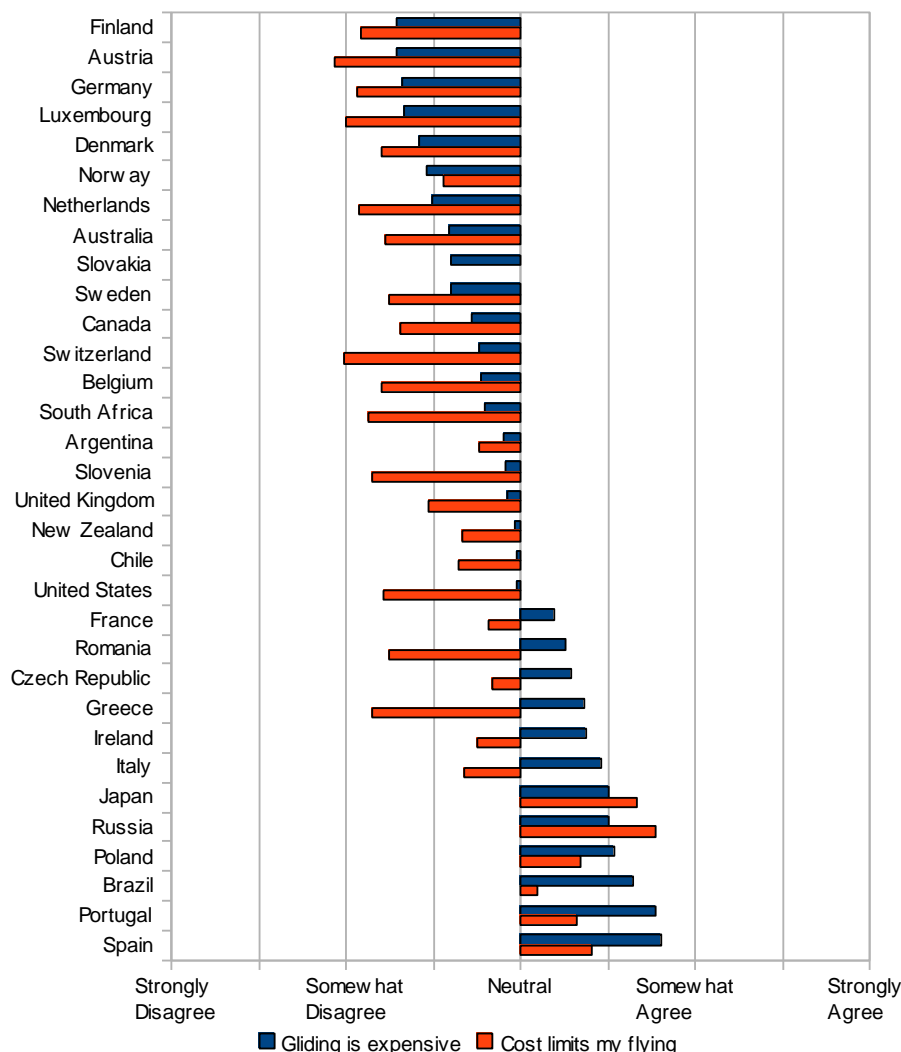
One interesting topic that does not show up as much as would be expected is the cost of gliding. As illustrated in section 9, it is a prominent item on pilots' "wish lists". However, when pilots are actually asked more specifically about the costs and their influence on flying, the consensus does not indicate that it is considered to be a significant problem.

The average pilot is neutral in respect to the cost of gliding, with a slight tendency to disagree with the fact that it limits his flying. There is also a consensus about the availability of reasonably priced second-hand gliders in the market.

In terms of pilot profile, the main difference of opinion on the matter is between private glider owners and those that fly with club equipment, as would be expected. However, while glider owners may view the costs and ease of ownership a bit more positively, opinions do not vary that significantly.

In terms of countries, where we see the greatest variation of responses, in the great majority of cases, perceptions of cost are more negative to the actual impact of the cost on persons' gliding.

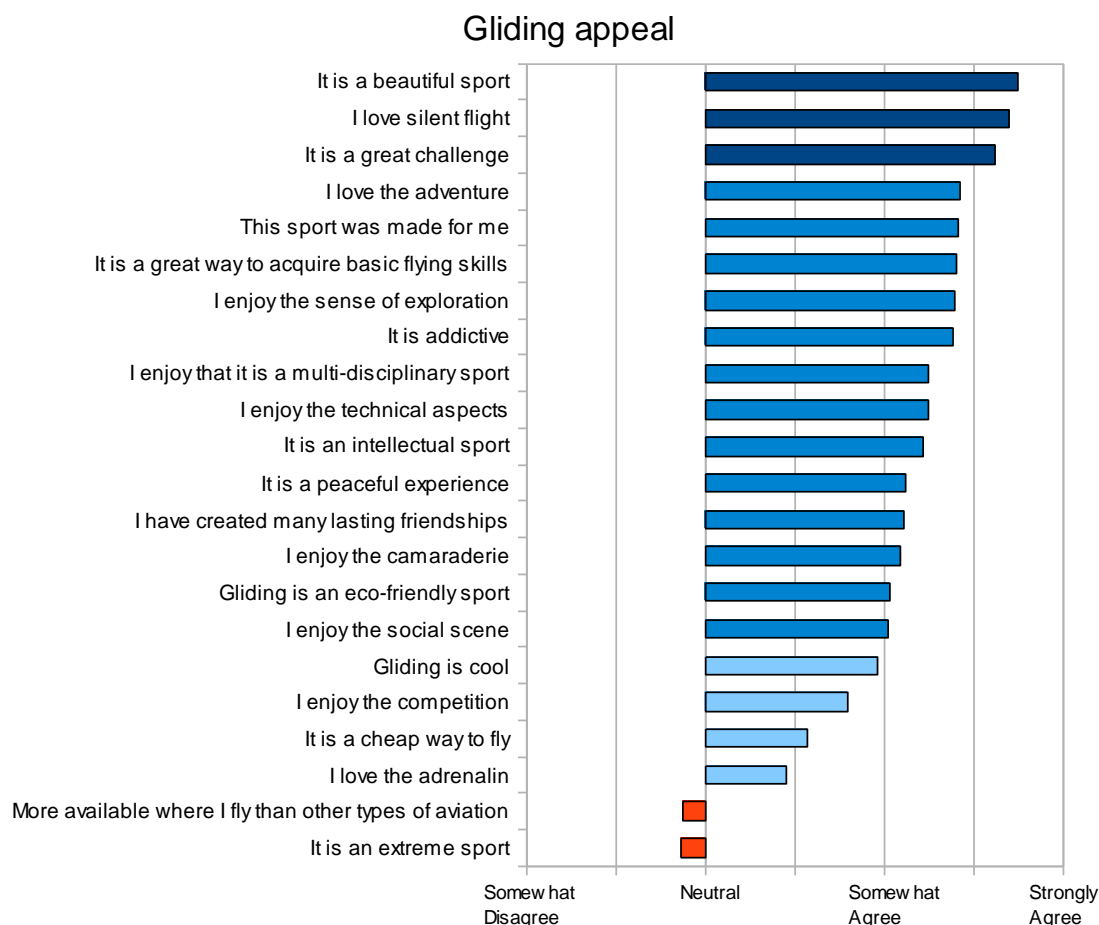
Cost perception per country



8. Gliding appeal

The objective of this section of the questionnaire was to identify the qualities or values that glider pilots identify with in the sport of soaring. Again, a series of statements were presented and the respondents were asked to rank them from 1 to 5, with one indicating complete disagreement and 5 indicating complete agreement.

The mean response for the entire sample is shown in the chart below:



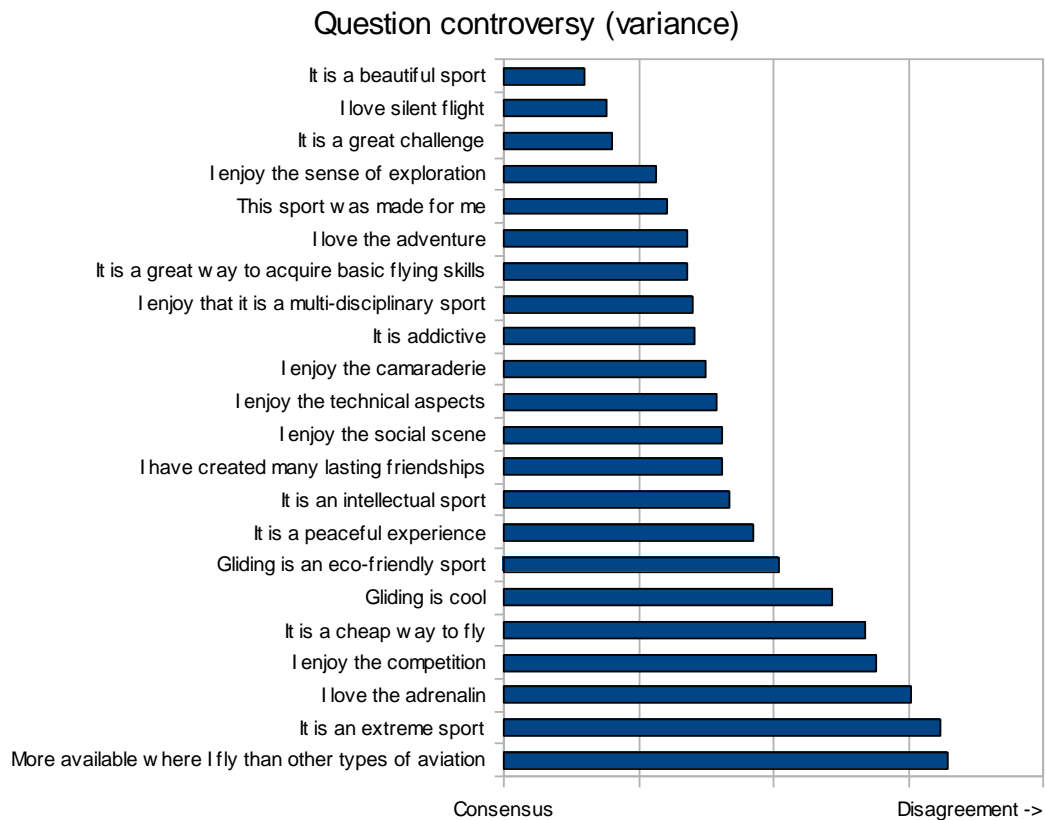
Interestingly, when looking at the variance in the response set, i.e. the difference of opinion in the responses given, we see a consistency in that the higher the rating of a statement, the more consensus there is in terms of the entire set of responses.

In trying to better understand the image of our sport, it would be useful to arrive at a set of different images or perceptions which characterize gliding in the minds of glider pilots. We can better define these perceptions by examining how the different statements presented here group together in the responses obtained.

Factor analysis of the results has provided a number of groupings which can best be described as:

- Primary values
- Extreme sport
- Social aspects
- Convenient and positive
- Intellectual

To some extent, we can say that the perception of soaring for each glider pilot is a combination of these different dimensions.



The most significant of these factors and the one which defines most of the responses is what is termed "primary values". This is essentially a grouping of statements which characterizes the primary aspects of our sport.

The components of each factor are:

Primary values	Factor loading
I love silent flight	.707
It is a great challenge	.682
I enjoy the technical aspects	.646
I love the adventure	.523
It is a beautiful sport	.519

Extreme sport	Factor loading
I love the adrenalin	.793
It is an extreme sport	.672
I enjoy the competition	.642
I love the adventure	.561

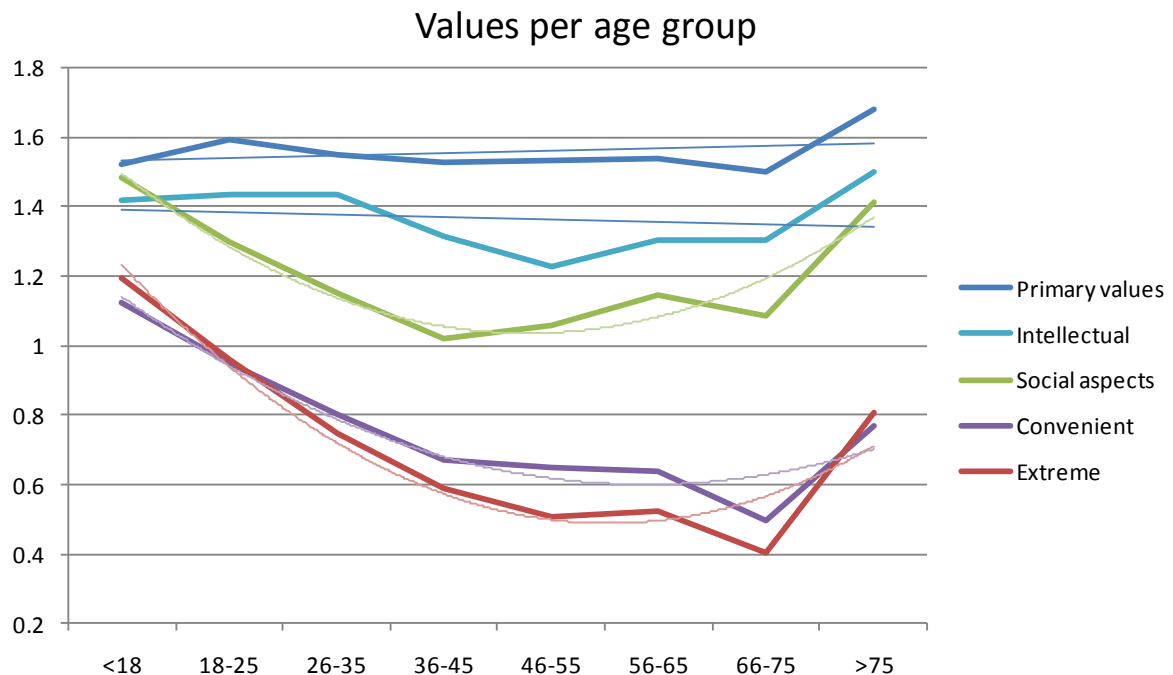
Social aspects	Factor loading
I enjoy the social scene	.871
I have created many lasting friendships	.845
I enjoy that it is a multi-disciplinary sport	.609

Convenient and positive	Factor loading
It is a cheap way to fly	.671
Gliding is more available where I fly than other types of aviation	.659
Gliding is an eco-friendly sport	.598
It is a peaceful experience	.472
Gliding is cool	.423

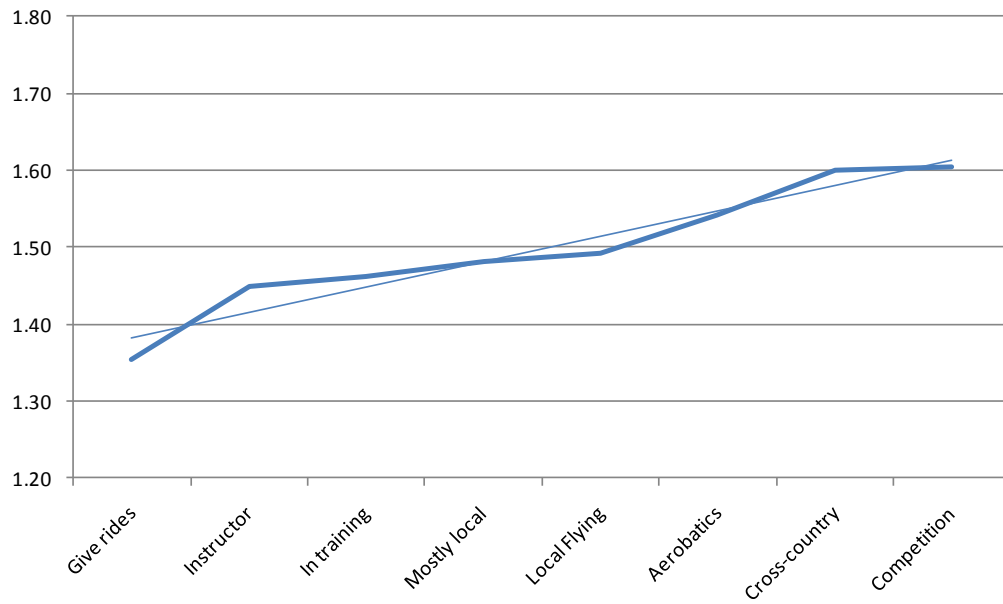
Intellectual	Factor loading
It is addictive	.738
It is an intellectual sport	.682
It is a great way to acquire basic flying skills	.575

In addition to being the most statistically significant factor, the "primary values" grouping seems to be the most consistent across different pilot backgrounds. There also seems to be a correlation between the degree of involvement in the sport of soaring and the identification of pilots with these values, something which means that these statements seem to be the most true in terms of defining the actual appeal of gliding.

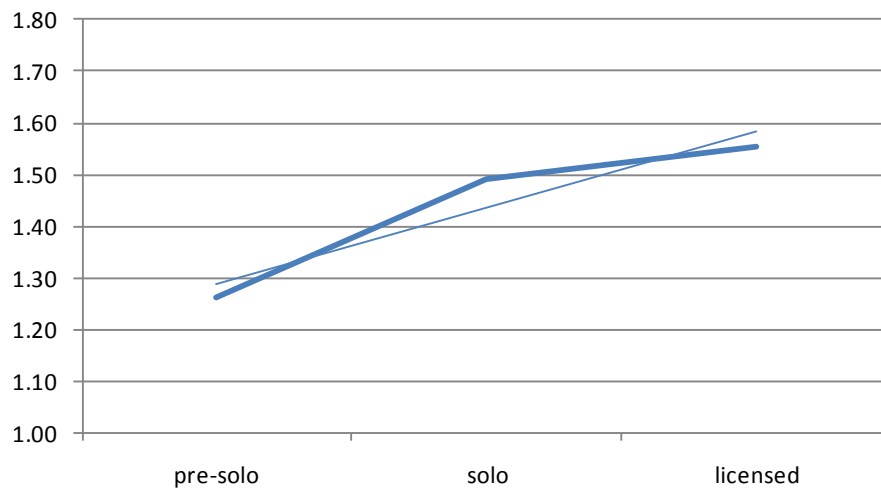
The charts below illustrate the point. Please note that the scale of the charts relates to the mean response score with 2 being total agreement, 0 neutral and -2 total disagreement.



Primary value appeal per flying category



Primary value appeal per licencing stage



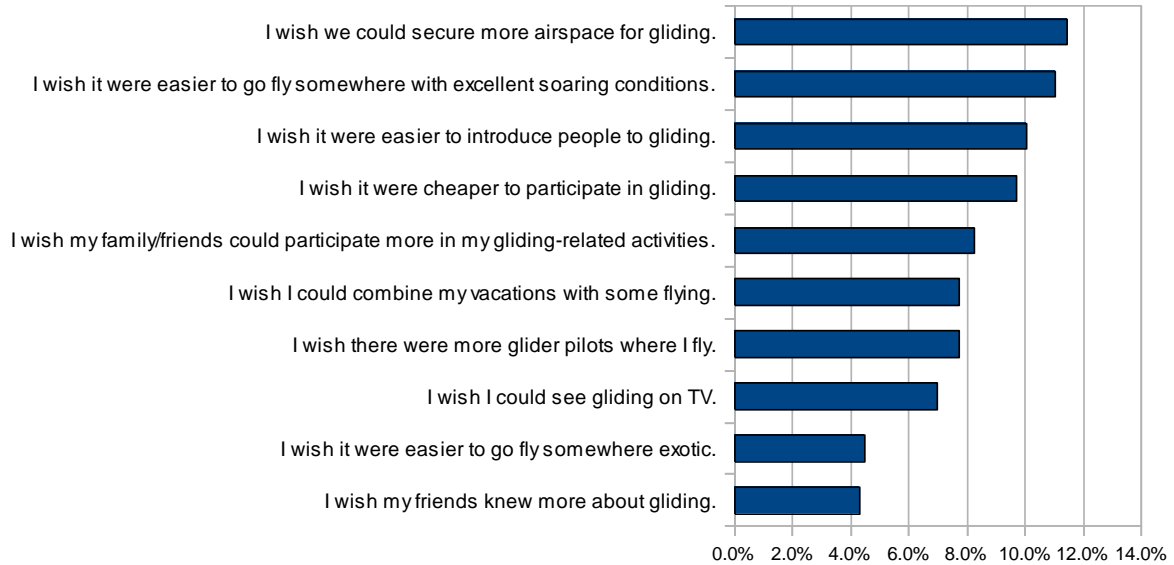
10. Wish list

A topic related to what pilots experience is what would they want different in the sport of gliding, or maybe what they consider the principal problems to be. This section of the questionnaire attempted to answer this question by creating a wish list with a number of topics related to possible development policies that could be adopted. Respondents were asked to choose the top three wishes, in order of importance.

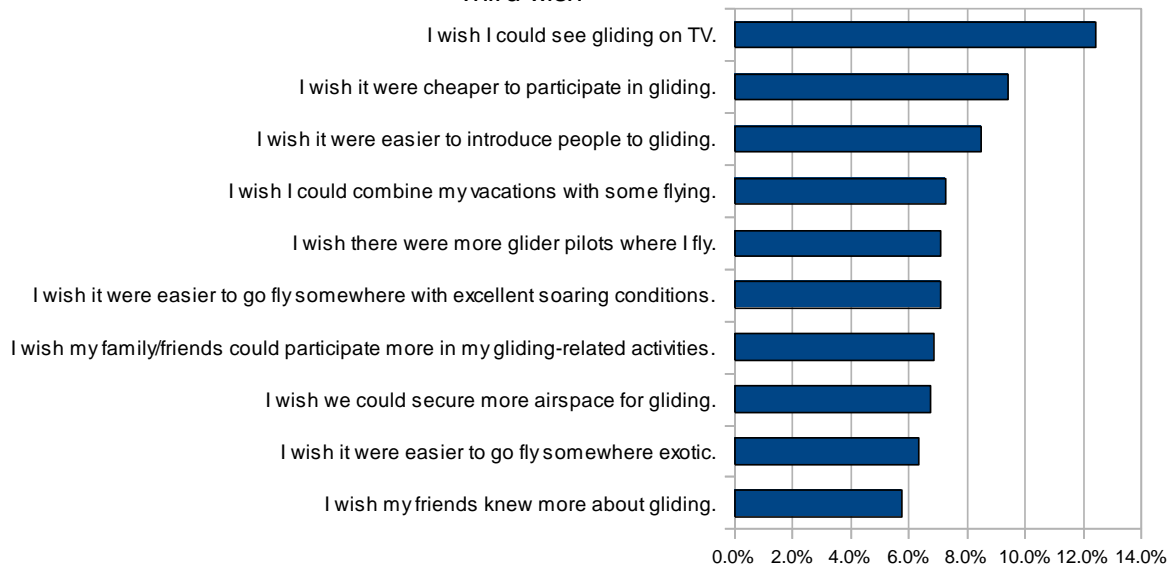
The following chart shows how each response scored, across the entire sample. When interpreting these results one should consider which nations are over-represented in the sample.



Second wish

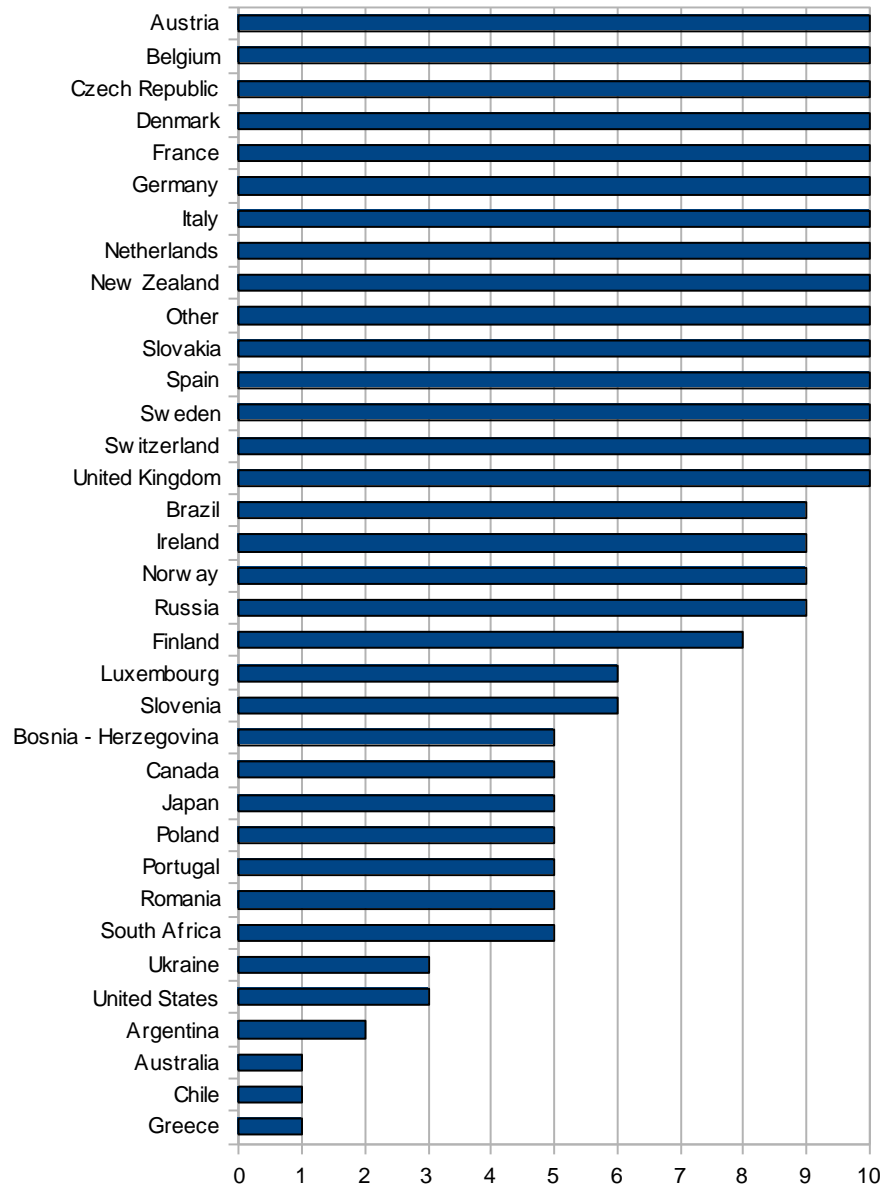


Third wish

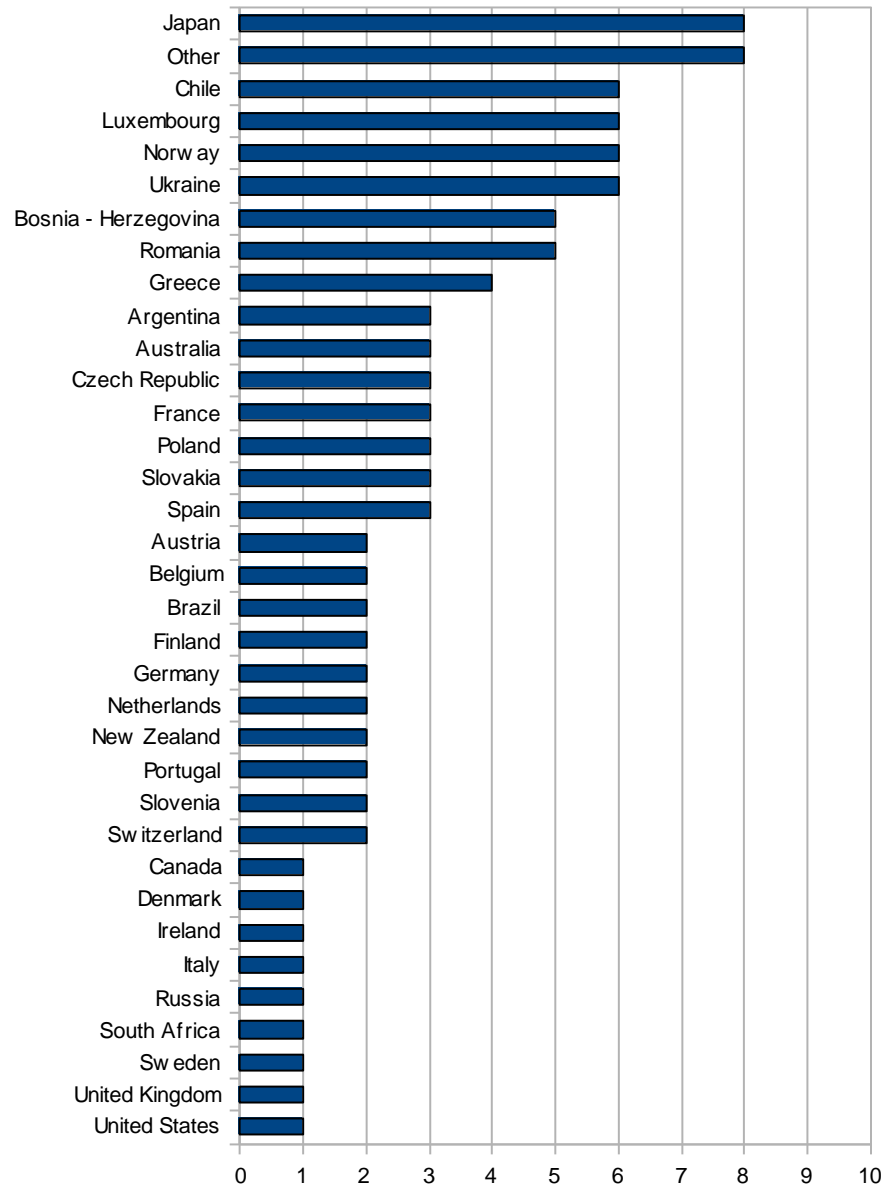


An analysis of statement rank per country follows (charts are ranked 0 to 10, with 10 being the most popular wish).

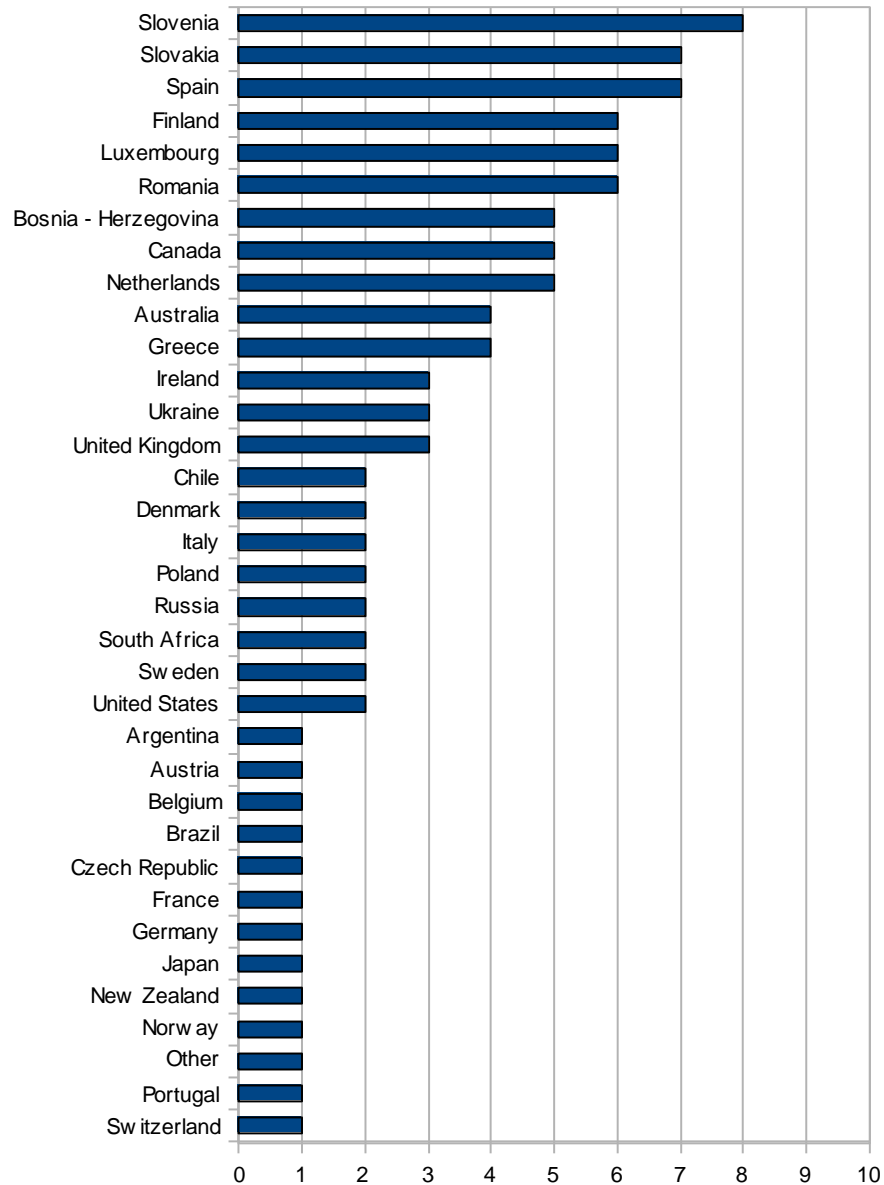
I wish we could secure more airspace for gliders



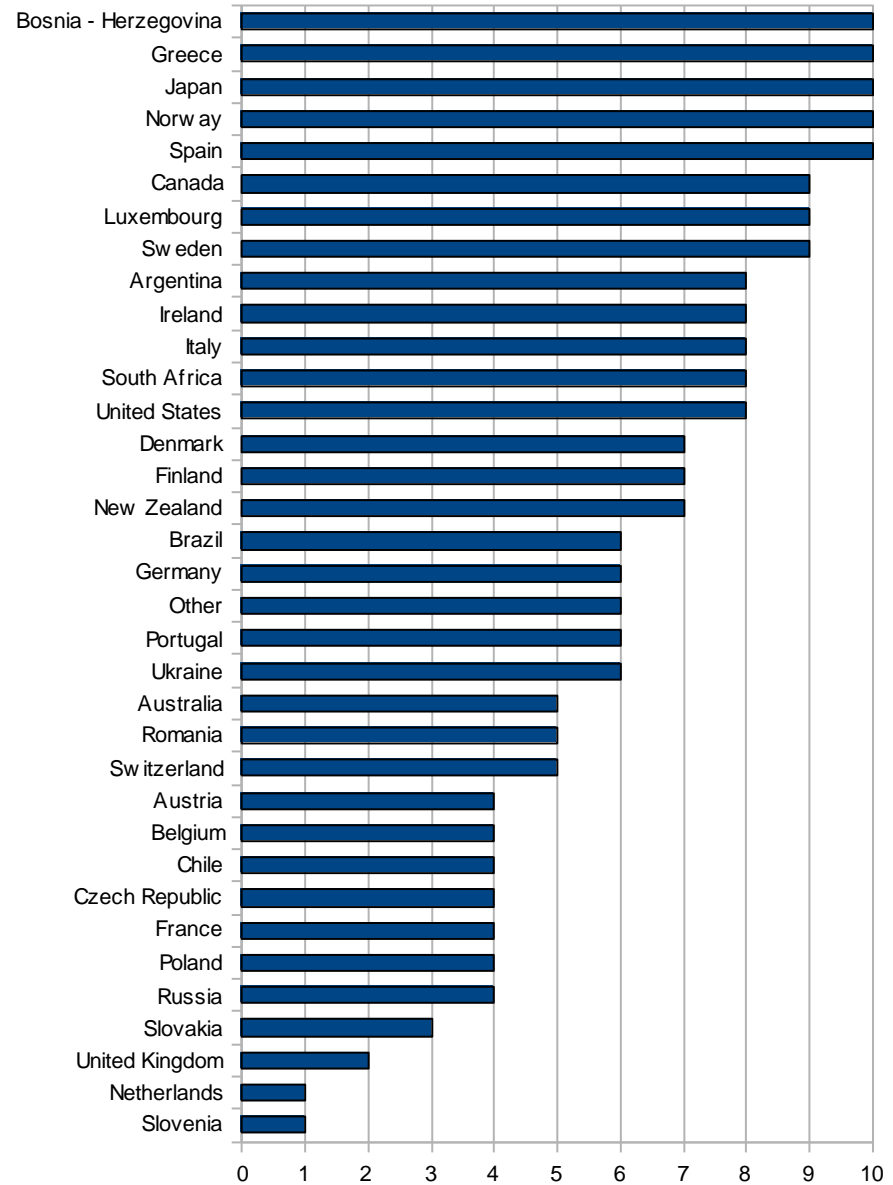
I wish my friends knew more about gliding



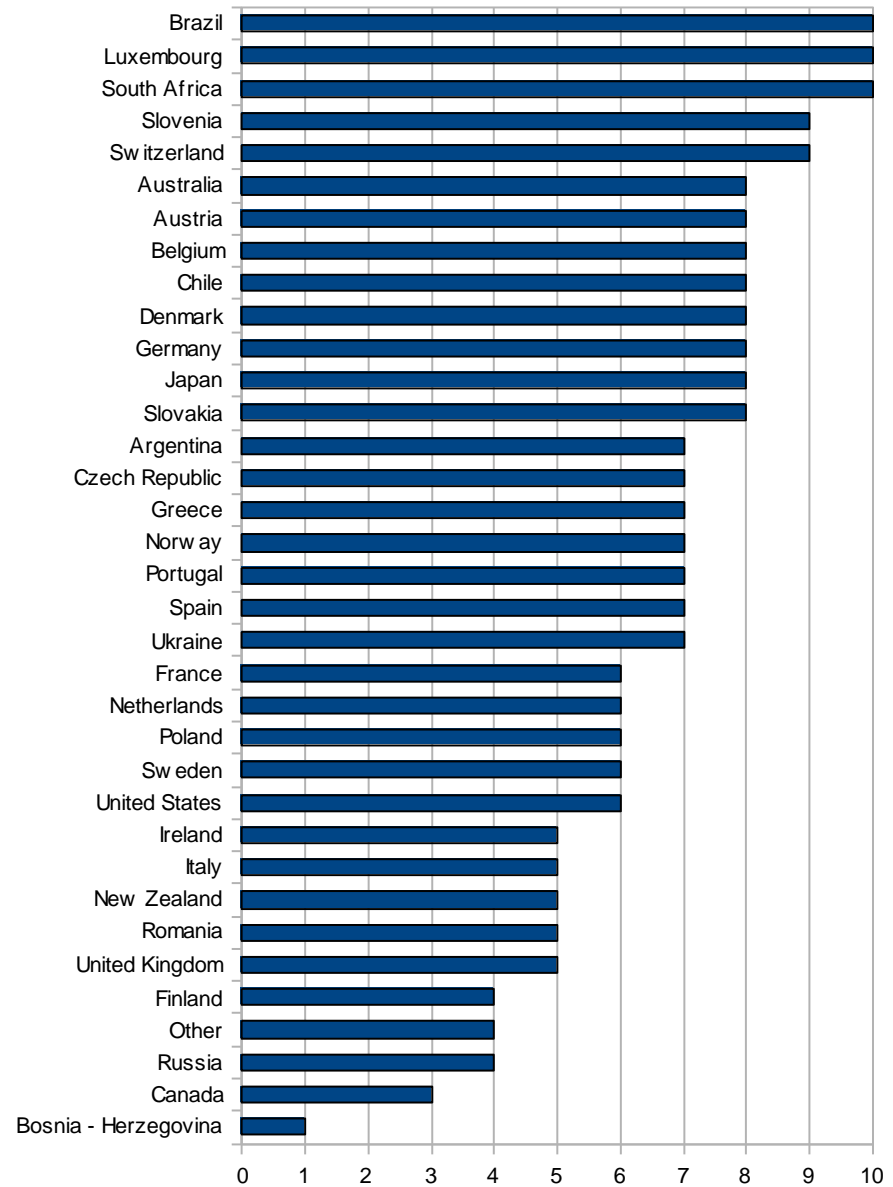
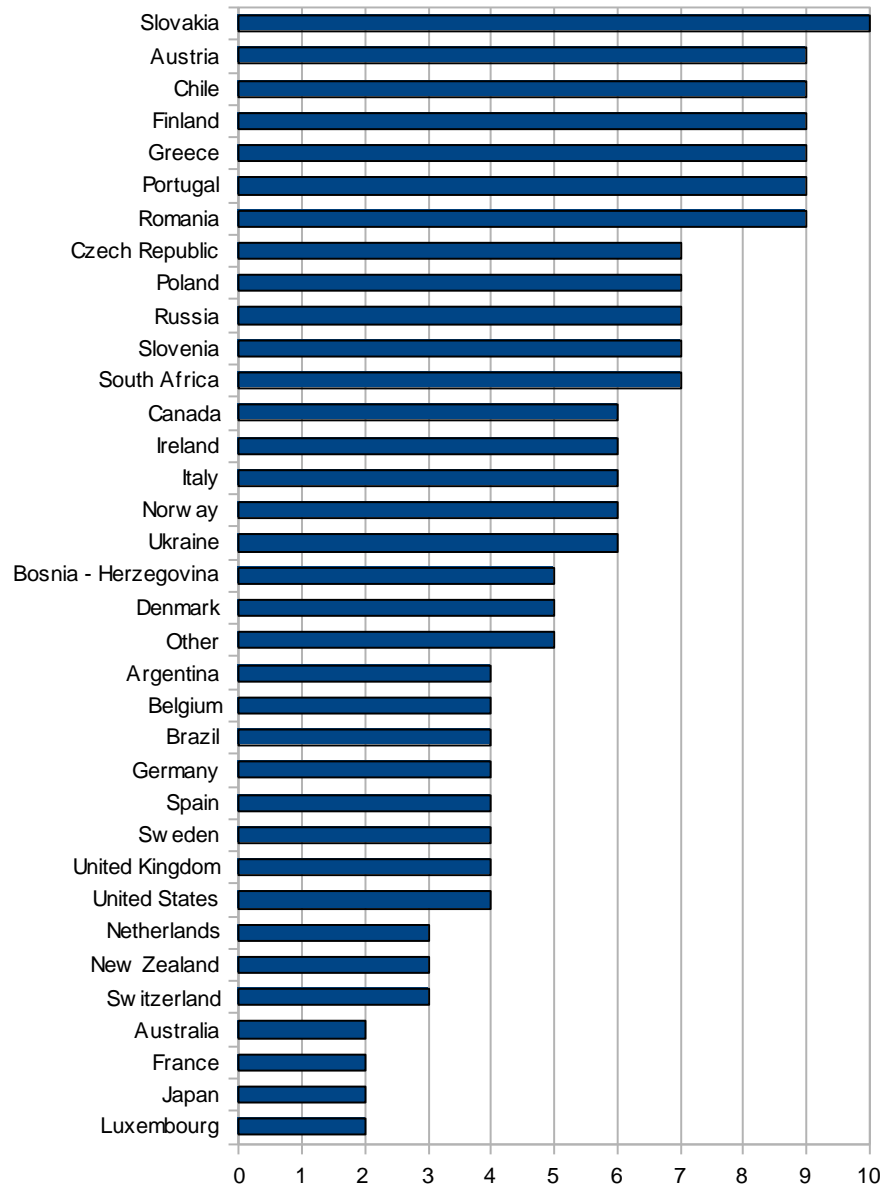
I wish it were easier to go fly somewhere exotic



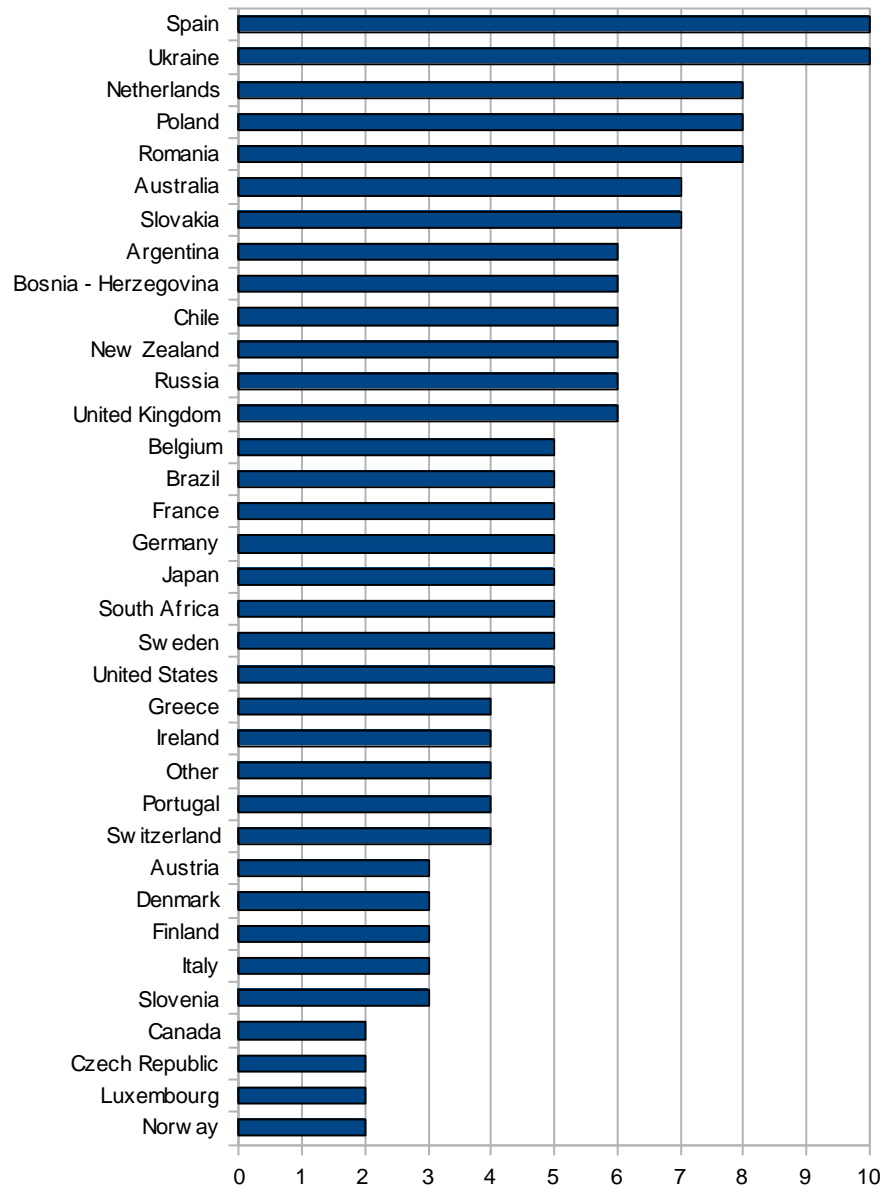
I wish there were more glider pilots where I fly



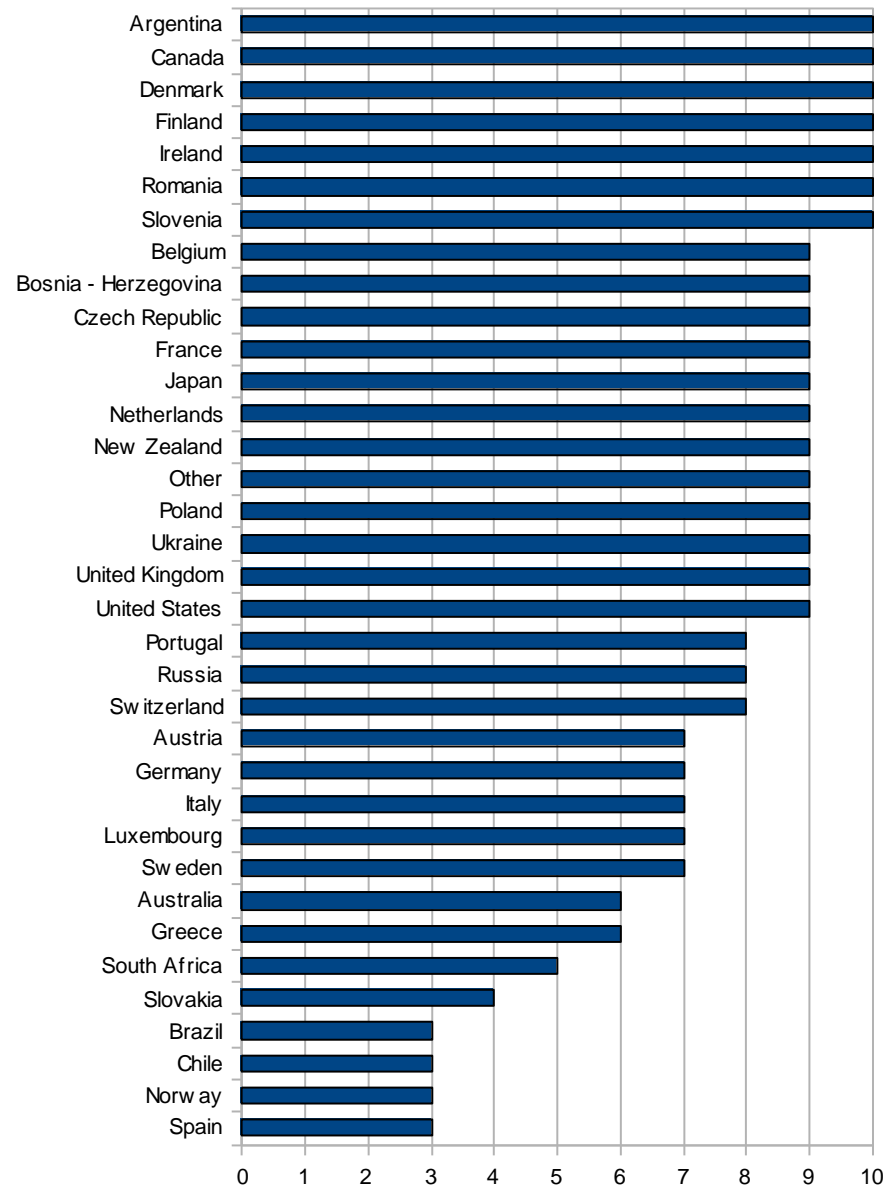
I wish I could combine my vacations with some gliding I wish my family/friends could participate more in my gliding-related activities



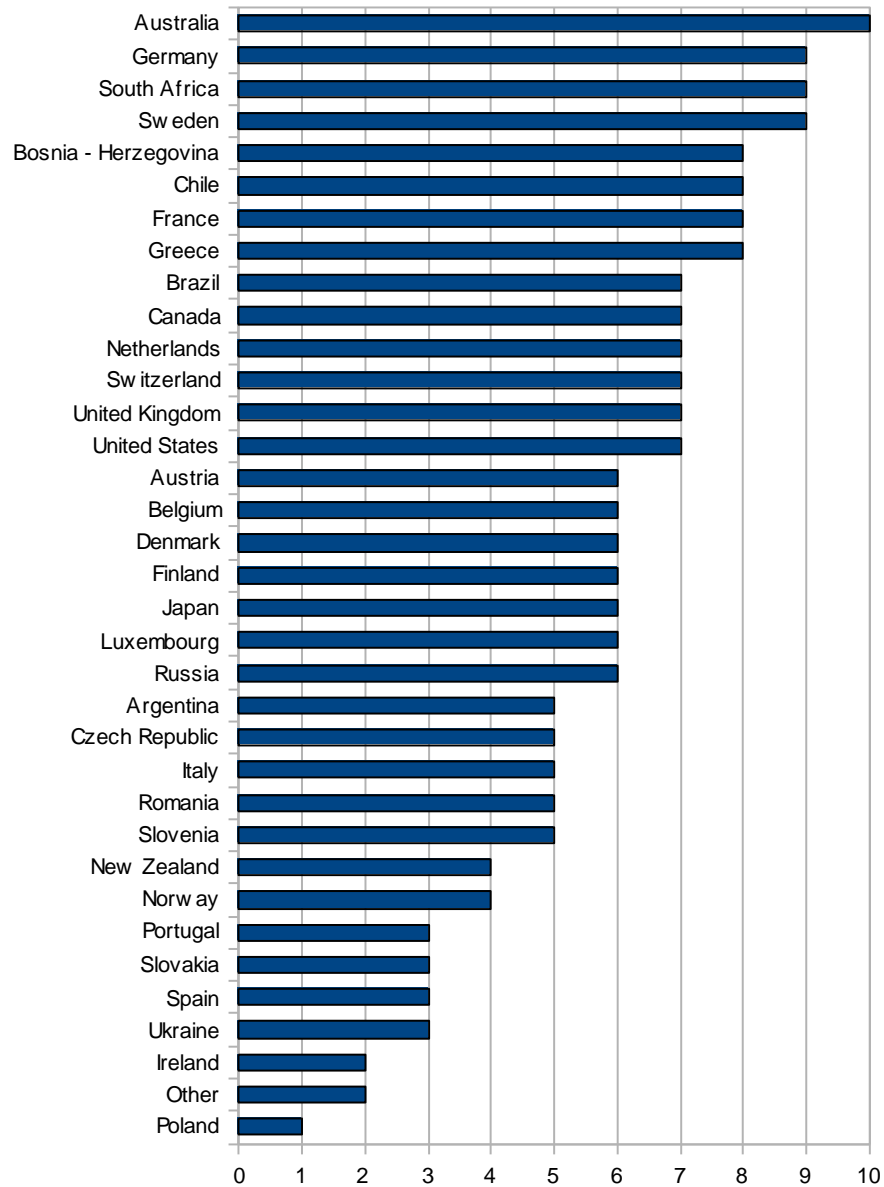
I wish I could see gliding on TV



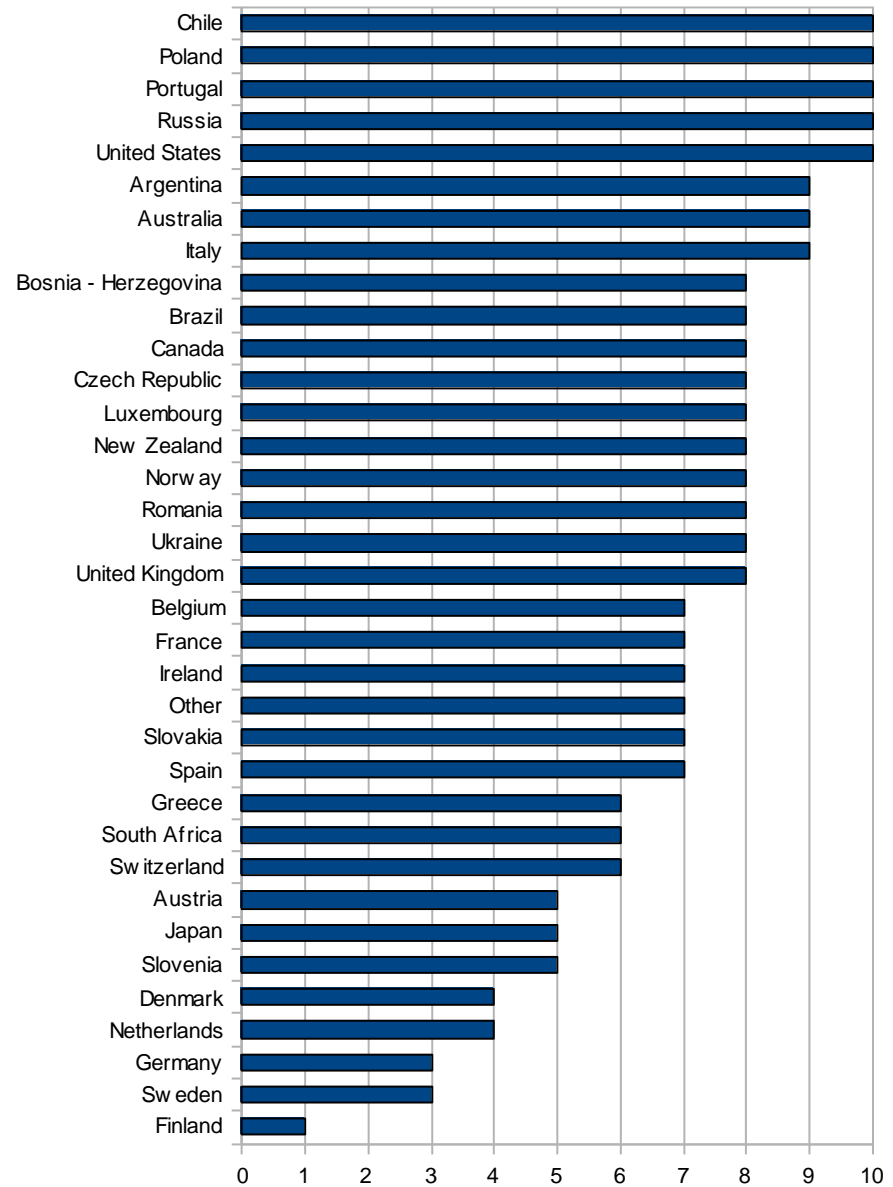
I wish it were easier to go fly somewhere with excellent soaring conditions



I wish it were easier to introduce people to gliding

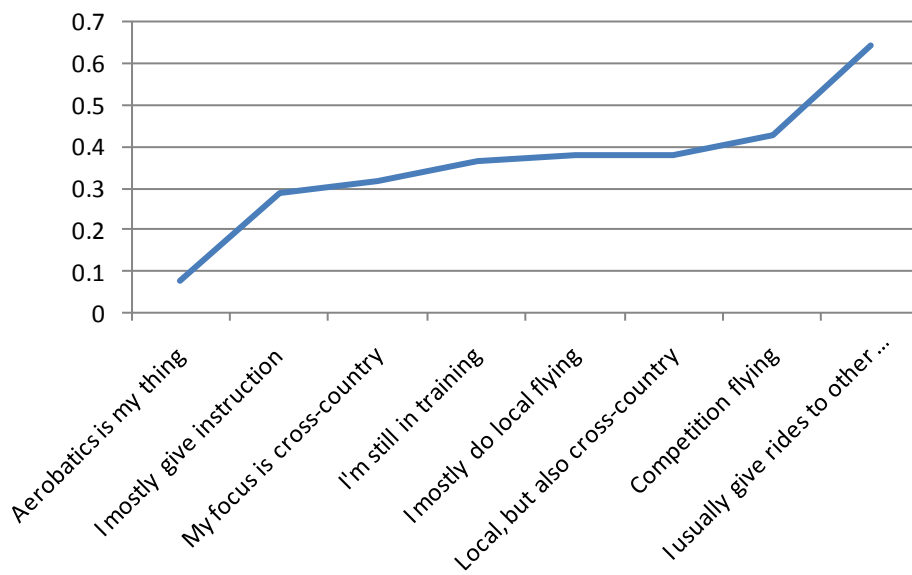


I wish it were cheaper to participate in gliding

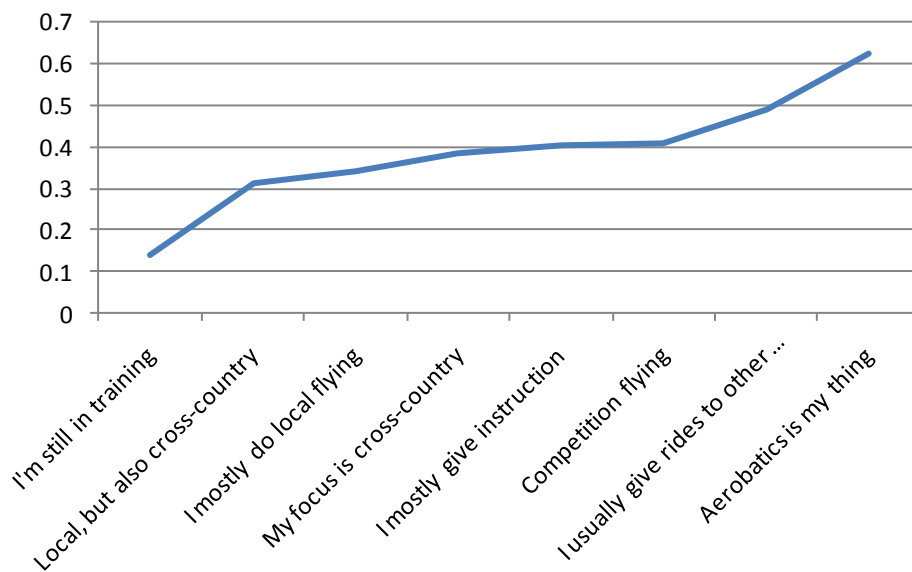


An analysis of wish popularity according to category of pilot activity follows.

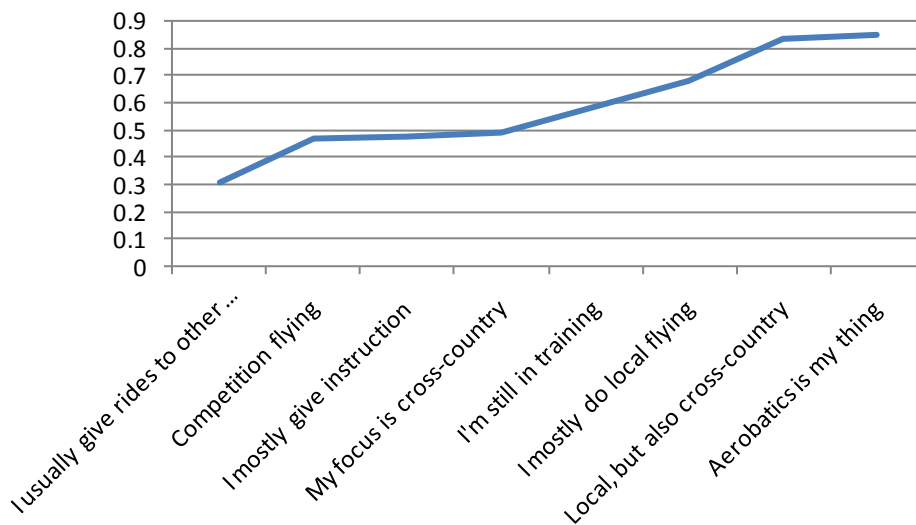
I wish my friends knew more about gliding.



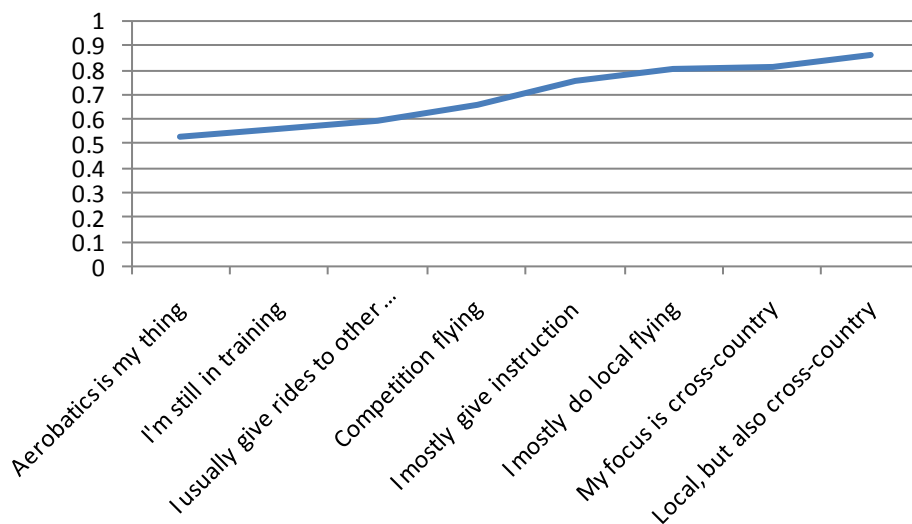
I wish it were easier to go fly somewhere exotic.



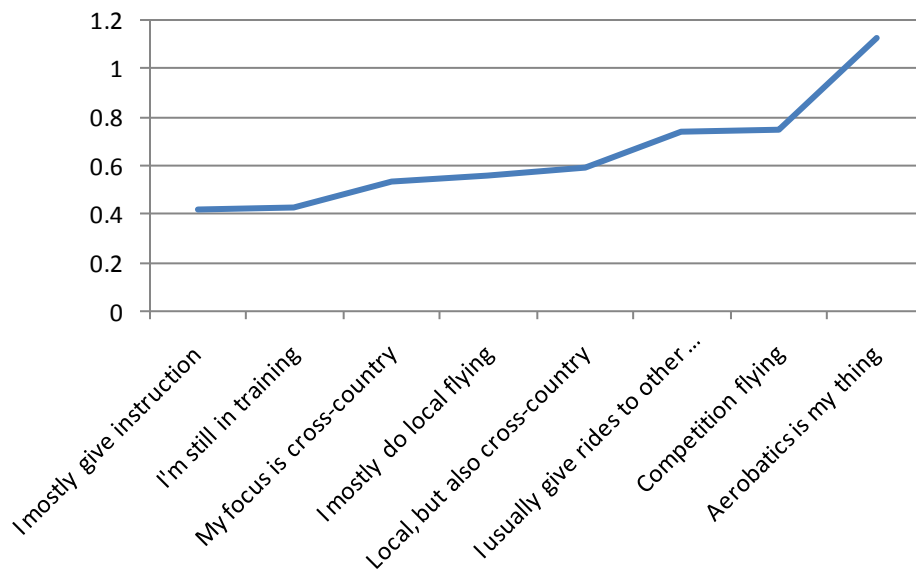
I wish I could combine my vacations with some flying.



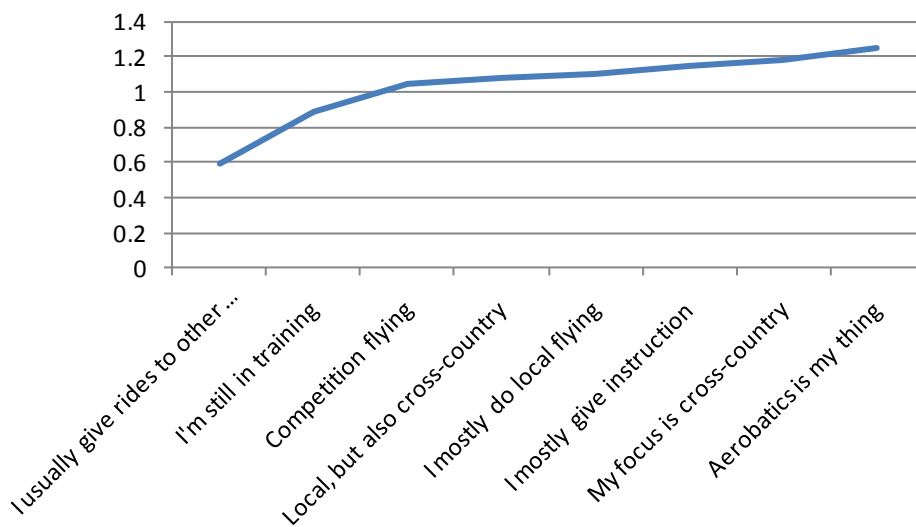
I wish my family/friends could participate more in my gliding-related activities.



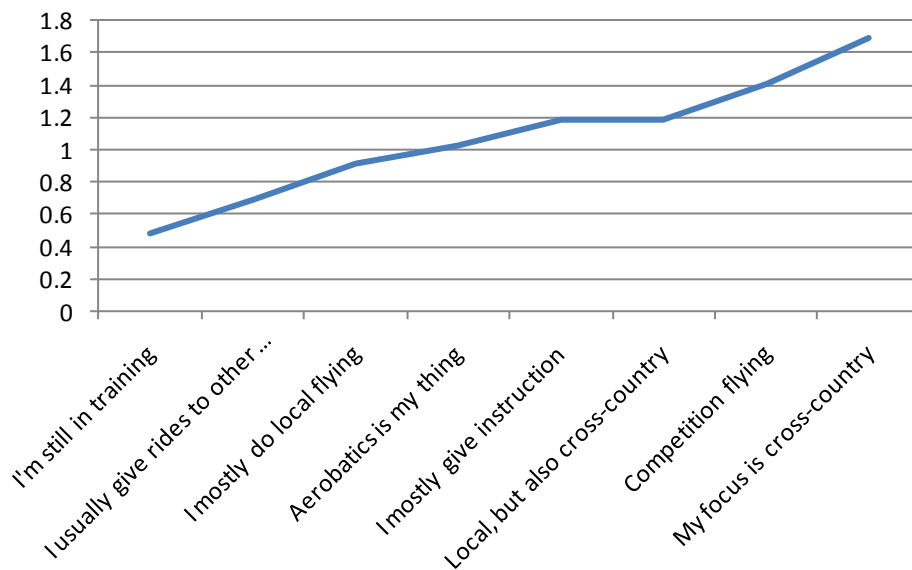
I wish I could see gliding on TV.



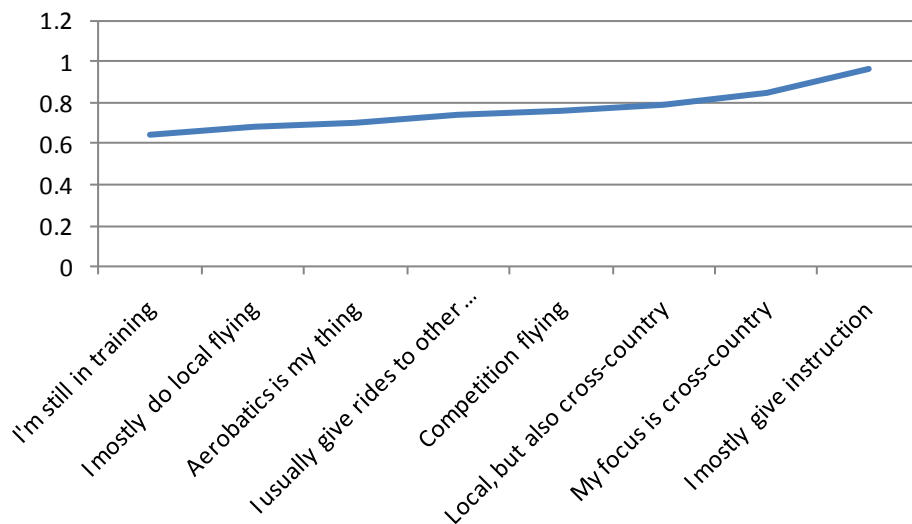
I wish it were easier to go fly somewhere with excellent soaring conditions.



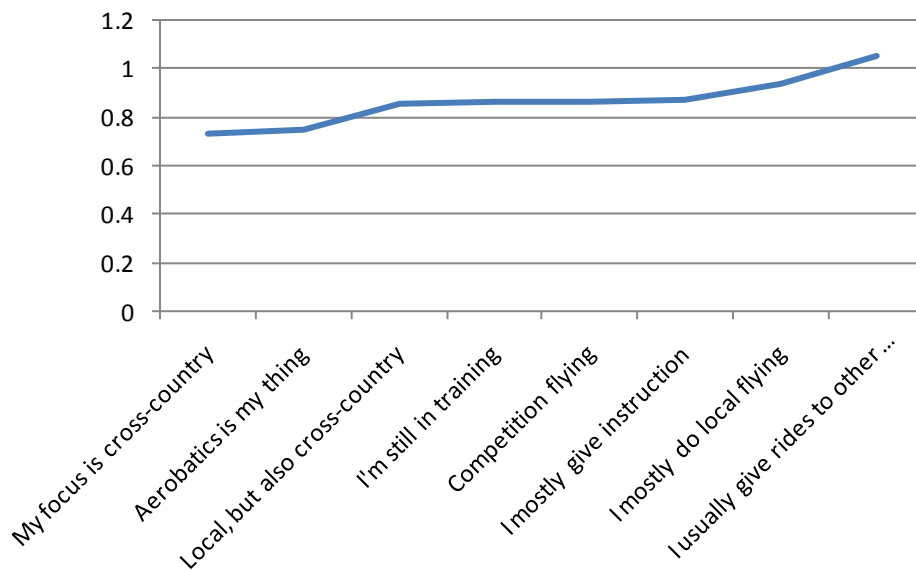
I wish we could secure more airspace for gliding.



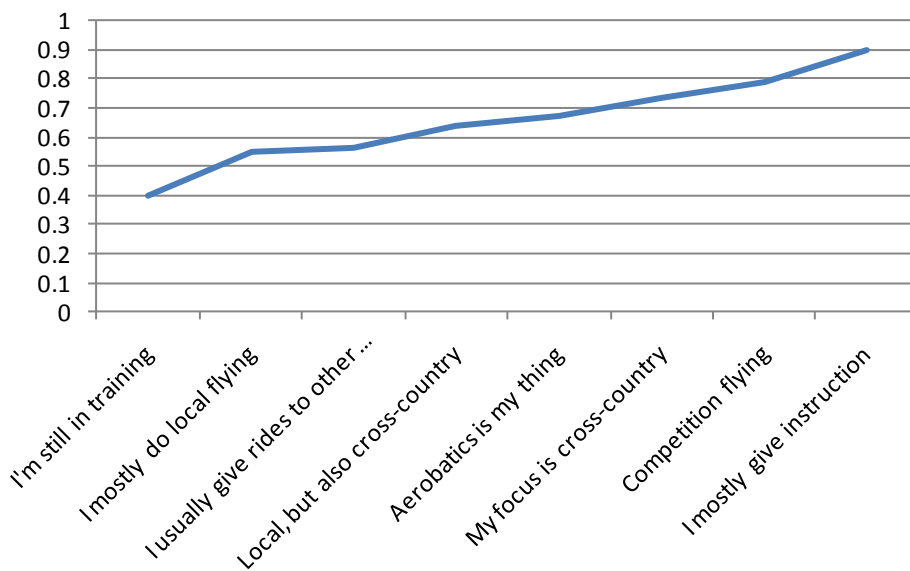
I wish it were easier to introduce people to gliding.



I wish it were cheaper to participate in gliding.

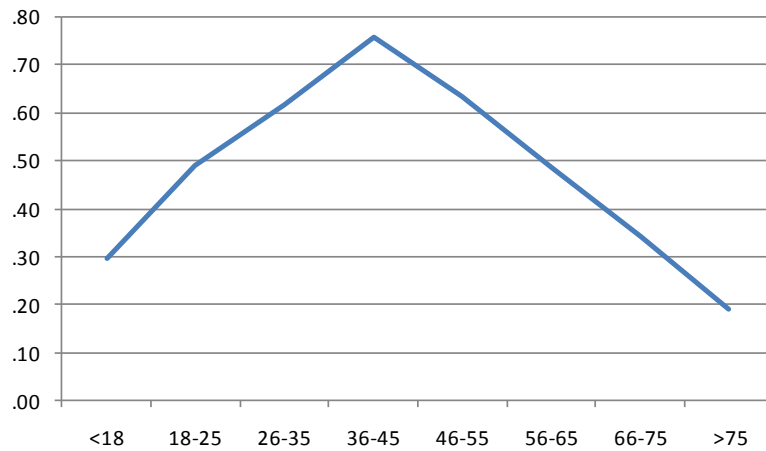


I wish there were more glider pilots where I fly.

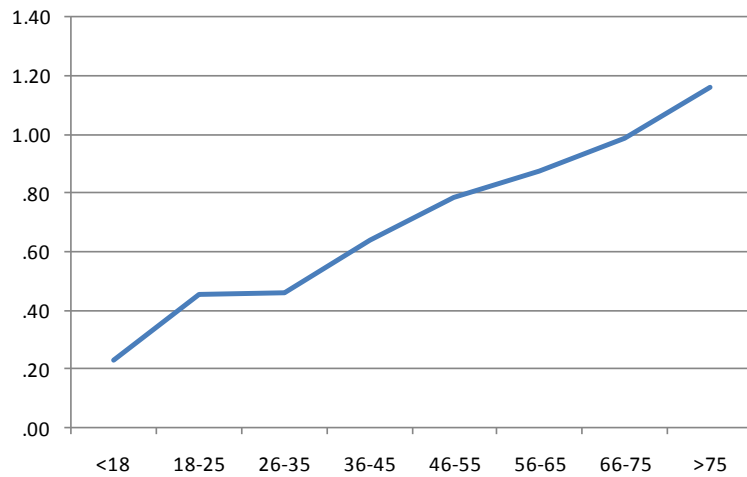


The following statements show differences in resonance according to age group:

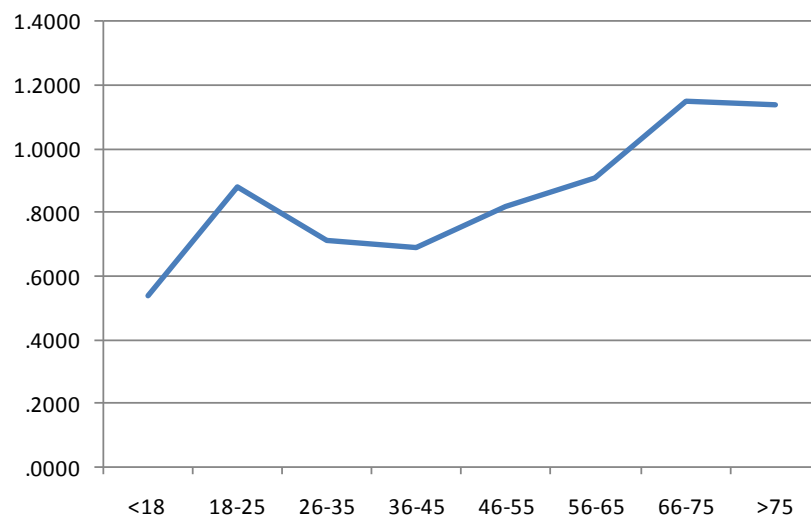
I wish I could combine my vacations with some flying.



I wish there were more glider pilots where I fly.



I wish it were cheaper to participate in gliding.



Factor analysis of the results shows the different dimensions into which the responses group:

Airspace versus gliding movement size	Factor loading
I wish we could secure more airspace for gliding.	-.685
I wish there were more glider pilots where I fly.	.620

Family and vacations	Factor loading
I wish I could combine my vacations with some flying.	.558
I wish my family/friends could participate more in my gliding-related activities.	.759

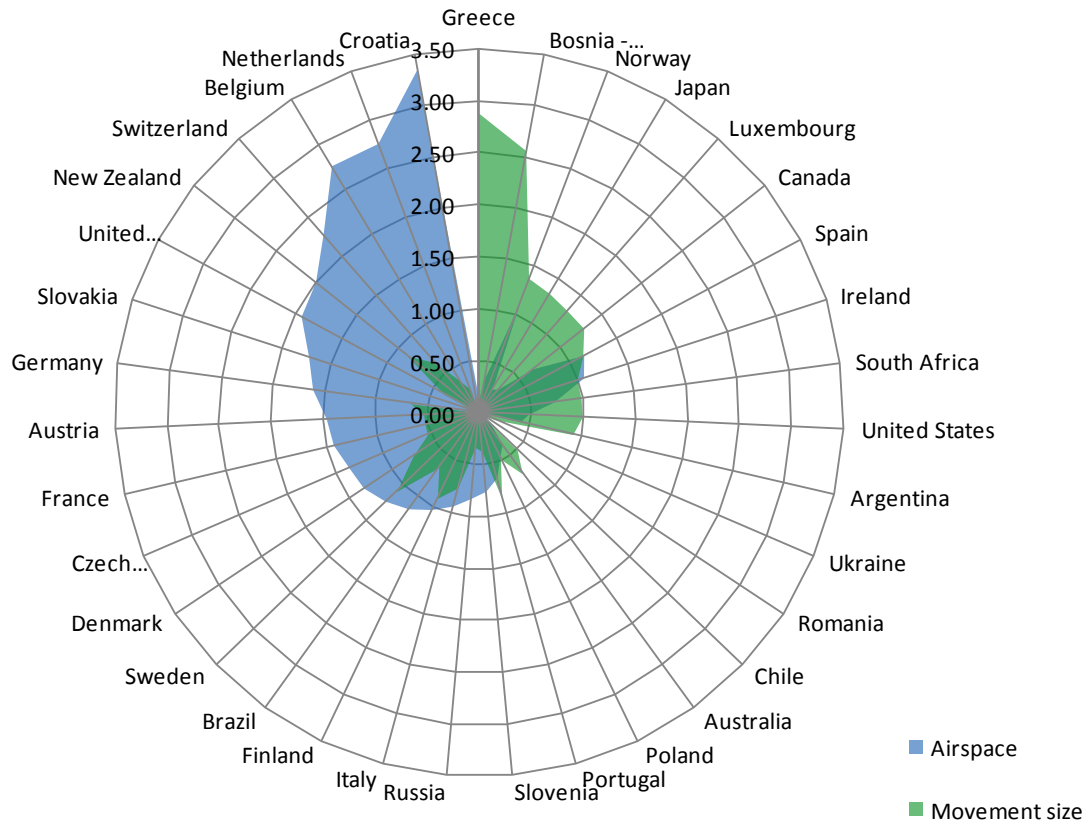
Travel versus growth	Factor loading
I wish it were easier to go fly somewhere exotic.	.586
I wish it were easier to go fly somewhere with excellent soaring conditions.	.554
I wish it were easier to introduce people to gliding.	-.566

Gliding image versus cost	Factor loading
I wish my friends knew more about gliding.	.684
I wish I could see gliding on TV.	.614
I wish it were cheaper to participate in gliding.	-.444

Some of these factors show a number of tensions which exist between topics. For example, in some countries people are more concerned with airspace issues, while in others, the issue is the small size of the gliding movement. In other words, the smaller the gliding movement in an area, the less people wish they could have more airspace, or conversely: the more problematic airspace is, chances are that there are a lot of glider pilots around.

The chart below illustrates the scores of airspace versus movement size for countries.

Airspace versus gliding movement size



11. Soaring country topology

When one looks at possible strategies to develop emerging gliding movements, the first question that comes up is which is an emerging country and which is an advanced one? At the extreme, we can make such classifications easily, but when we move towards the middle, it is very difficult to make such distinctions. Not only is it difficult to state where country X belongs, but we have to also arrive at what constitutes an emerging gliding movement as opposed to an advanced one. Indeed, how can we rate a country against the level of maturity of its gliding movement?

The themes that have come into focus in this analysis help us approach this problem. In terms of issues experienced by pilots, the topics that come to the fore are barriers to flight and airspace. Here is where the difference of opinion between respondents is the most important and consistent. These are issues that contrast emerging with advanced nations and they are yardsticks against which countries can be ranked (at least these are the ones that the present research brings to the foreground).

When we look at the values that characterize pilot perceptions of our sport, there is a consistency of opinion across countries. In this case pilot background has more to say than actual country, so we may state that soaring remains true to its values across national boundaries.

The issue of emerging versus advanced comes to focus again in the wish list, were we see people's choices characterized again by a tension between airspace and size of movement; ability to bring new people into the sport versus opportunity to go glide in a fancy adventurous place; and so on.

It is possible to look into the relationships between all this data and to try to group countries into different clusters according to pilot responses. Not surprisingly, the results of such analysis bring forward the main topic of barriers to cross-country versus airspace and regulatory issues.

There are three distinct groups that emerge from this analysis and we shall name them as follows:

- Barriers to flight
- Land of plenty
- Advance but slightly restricted

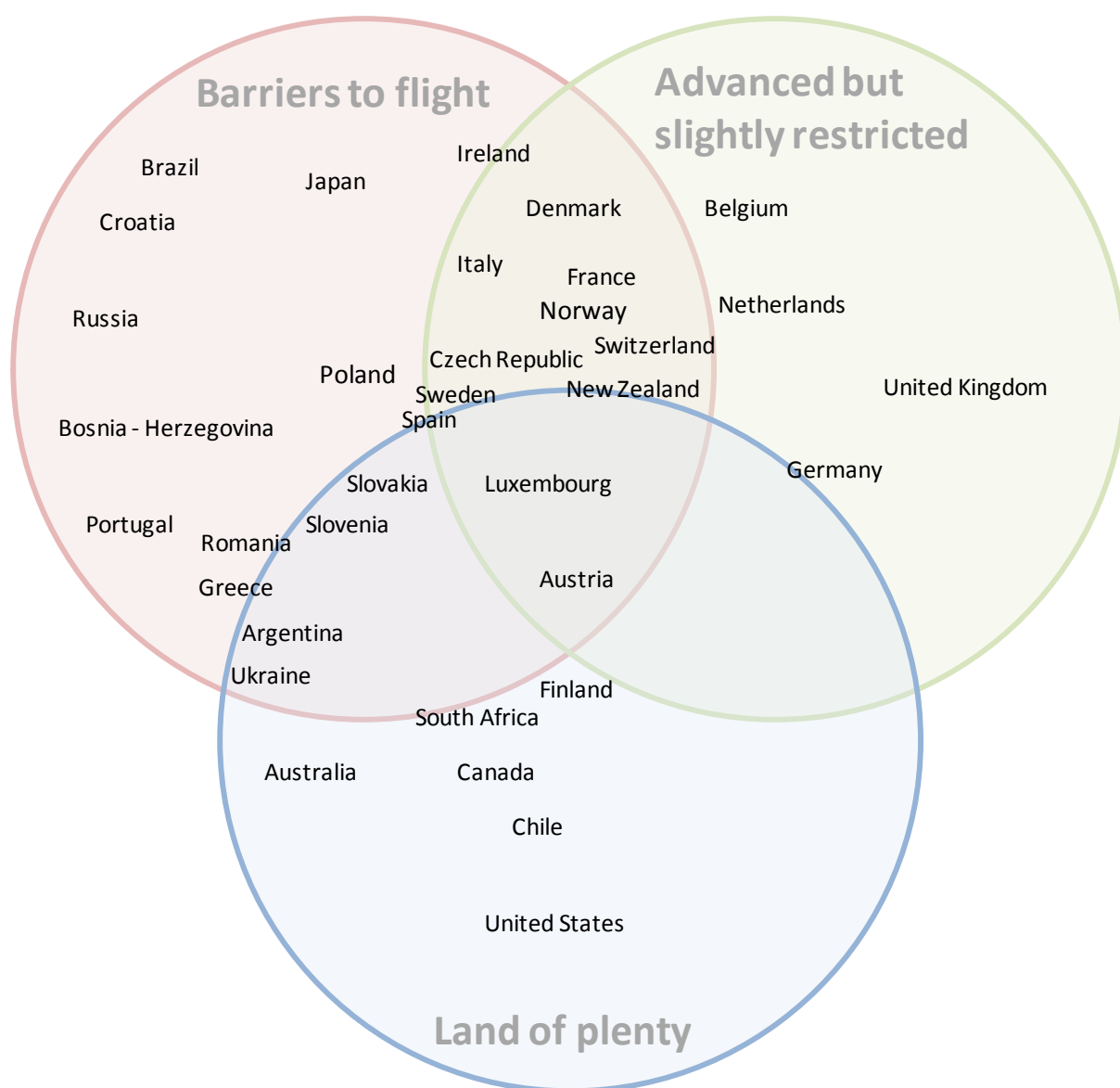
These are, in fact, stereotypes of pilot experiences and we can try to map out the countries in relation to these three categories. Here are what these stereotypes are:

Barriers to flight describes a country that typically has all sorts of problems, including barriers to cross-country but also airspace issues. These are the most problematic nations and we can expect an emerging soaring movement to belong here.

Land of plenty is a country that experiences few barriers to cross-country flight, few airspace and regulatory issues and also rates well in all other associated categories. Countries belonging to this group are not necessarily the most advanced soaring nations, as others (belonging to the next group) may actually rate higher in some aspects. But these are countries where soaring can prosper, as the conditions needed seem to be in place.

Advanced but slightly restricted describes some of the most advanced soaring nations that are experiencing some issues, primarily with airspace and possibly regulation.

In an ideal world, we could take each country and place it in one of the categories. However, few gliding movements fit one of these stereotypes exactly. If we were to draw three circles, one for each stereotype, and have them intersect at the middle, a few countries will be found in the intersections and a few countries would be found straddling the line on the border between the intersections of the circles, as illustrated in the graph below:



Appendix A - Questionnaire

1. Personal profile

Please tell us a few things about yourself. Select the response that best applies to you

Where do you live? {List of countries}

Age

- <18
- 18-25
- 26-35
- 36-45
- 46-55
- 56-65
- 66-75
- >75

Sex

- Male
- Female

Marital status

- Single
- Married/Partner

Family situation

- No children
- Young children
- Children in school
- Grown up children

Employment

- Student
- Employee
- Self-employed
- Professional
- Business owner
- Retired
- Other

2. Pilot profile (a)

Please tell us a few things about your pilot background. Again, select the response that best applies to you.

How long have you been flying gliders?

- Less than 5 years
- 5 - 10 years
- 11 - 20 years
- More than 20 years

What is your glider pilot status?

Currently in training, pre-solo
Solo
I have pilot license, or equivalent

How many hours have you logged in gliders?

Less than 50
50 - 100
100 - 300
300 - 500
500 - 1000
1000 - 5000
More than 5000

Do you hold an instructor rating?

Yes
No
Yes, but not in gliders

Do you fly cross-country?

Yes
No

Have you ever participated in a gliding competition?

Yes, still competing
Yes, but not now
No

Do you fly aerobatics?

Yes, simple aerobatics
Yes, full aerobatics
No

What type of flying characterizes you most?

I'm still in training
I mostly do local flying
Local, but also cross-country
My focus is cross-country
Competition flying
I mostly give instruction
Aerobatics is my thing
I usually give rides to other people

When do you do most of your flying?

Weekends
Midweek
All days of the week
During vacations

How many hours do you fly per year?

Under 10
10 - 20

20 - 50
50 - 100
100 - 300
300 - 500
over 500

Are you a member of a gliding club?

Yes
No

How far from you is the airfield you usually fly from?

Walking distance
about a 15 minute drive
20 to 45 minutes
45 min to 1 hour
Between 1 hour and 1:30
1:30 to 2 hours away
more than 2 hours away, but reachable within the day
More than a daytrip away from home

Do you own a glider?

Yes
Yes, as part of a syndicate (fractional ownership)
Yes, I own more than one glider (whole or fractional ownership)
No

Do you fly anything other than a glider?

Yes
No

If yes, please check all that apply

R/C models
Balloon - lighter than air
Paraglider
Hang glider
Ultralight (2-axis)
Ultralight (3-axis)
Touring motorglider
Single engine light aircraft
Multi engine - complex aircraft
Helicopter - rotorcraft
Heavy metal
Military

Are you an aviation professional?

No
Yes, glider related
Yes, not glider related

3. Club - private glider

Please tell us a few things about your club. (To be answered by people indicating they belong to a club)

How many two-seater gliders does your club have?

How many single-seater gliders does your club have?

Please indicate the type of equipment available at your club (tick all that apply)

Wood/fabric 2-seater
Metal 2-seater
Glass 2-seater
Vintage glider
High performance sailplane
Turbo sailplane
SLMG sailplane
Touring motorglider
Ultralight motorglider

Please indicate the launch methods used by your club

Aerotow
Winch
Self-launch
Other

Does your club operate year-round?

Yes
No

What days does your club operate?

Weekends only
Weekends and some days of the week
Weekends and some days of the week,
depending on season
7 days a week during peak season, less in off-
season
7 days a week, year round

Are you satisfied by the facilities of your club?

Yes
Somewhat
No

Are you satisfied by the atmosphere of your club?

Yes
Somewhat
No

Are you satisfied by the operation of your club and support provided?

Yes
Somewhat
No

Please tell us a few things about your glider. If you own more than one glider, please answer for the one you use the most. (To be answered only by people indicating they own a glider).

Please choose the category that best describes your glider

Open class
18 meter class
racing class
standard class
wood/vintage
world class
ultralight
two-seater trainer
acrobatic
touring motor glider
ultralight motor glider

Does it have an engine?

No
Yes, it is self-launching
Yes, a turbo for restarts
Yes, fixed (non-retractable)

4. Pilot profile (b)

Please indicate the country you usually fly from, if it is different from the one you live in:

{country list}

Do you regularly participate in gliding competitions?

Yes
No

Do you participate in any online contests/championships?

Yes
No

If yes, please check all that apply

OLC
National online contest/ladder
Other, Please specify ULR:

Do you use a gliding flight simulator?

No
Yes

If yes, please state the type:

Condor
Silent Wings
SFS
Sailors of the Sky
FSX (or older Microsoft Flight Simulator)
X-plane
Other

If yes, do you fly online competitions?

Yes

No

Have you flown a glider in another country?

Yes

No

If yes, please answer the following questions:

How often have you flown outside your country?

Once or twice

Occasionally

Frequently

Most every year

Do you fly outside your country as part of a gliding vacation?

Yes

No

Do you fly outside your country as part of a gliding competition?

Yes

No

Have you found it easy or difficult to secure the required information and make arrangements (site, aircraft, licences, etc) for your flights abroad?

Very easy

Relatively Easy

Acceptable

Slightly difficult

Very Difficult

Once at the airfield, was it easy to get to the actual flying?

Very easy

Relatively easy

Acceptable

Slightly difficult

Very Difficult

In general, how would you rate your experience(s) of flying abroad?

Exceptional

Good

Satisfactory

Unsatisfactory

Very bad

Have you participated in a gliding safari?

No

Yes, in my country

Yes, abroad
Yes, both in my country and abroad.
What is a gliding safety?

If you have not flown a glider abroad, please answer the following questions:

Would you like to go on a gliding vacation abroad?

Yes
Maybe
No

Have you found it easy or difficult to find information on gliding abroad?

I have not looked
Very easy
Relatively Easy
Acceptable
Slightly difficult
Very Difficult

5. Gliding experiences - issues

Tell us about the experiences and issues you face as a glider pilot. Please rate each of the following statements in a scale from 1 to 5, 1 if you strongly disagree, 5 if you strongly agree.

It is difficult to recruit new participants to our sport.

I wish there were more opportunities to fly where I live.

Airspace restrictions are a serious problem where I fly.

It is difficult to get a license.

Knowledge of soaring conditions here is not as good as I would like.

I would like to do more training, but it is difficult to secure a lesson as there is too much demand for the resources available.

There are a lot of times when I would like to fly, but the airfield/club is closed.

Regulation is too onerous for gliding.

I think a turbo or SMLG glider would (does) improve the amount of flying I do.

Family/social constraints limit my gliding.

Gliding is too expensive.

Owning your own glider is too much trouble.

I have made many friends in my club.

It is difficult to reach solo.

Regulations ensure the safety of flight in a satisfactory way.

There are good value second-hand gliders available.

My club has enough gliders for training.

Availability of training is not good.

Flying cross-country is too problematic where I fly, due to regulations or ATC.

I would like to do more gliding per year.

I would like to be part of a glider syndicate (fractional ownership), but there is not enough opportunity for this where I fly.

There are gliding opportunities for every budget.

The social element of club life is a part of the enjoyment of gliding.

I wish there was more opportunity to take a cross-country flying course where I fly.

There are too many politics in gliding.

There is too little information on the weather where I fly.

It is too difficult to buy a glider.

There are enough opportunities for me to fly with expert pilots, so as to improve my cross-country performance.

We have problems dealing with the authorities to secure our rights to glide.

I would like to buy a glider but cannot afford to.

Airspace is restricted around my airfield.

There are too few soaring days during the year, I wish there was better weather more often.

Gliding takes too much of my time.

I do not believe gliders with engines (turbo-slmg) have a place in 'real' gliding.

There are too few people flying cross-country in my area.

I am happy with the amount of gliding I do.

You meet a lot of interesting people in gliding.

I do not have enough time for gliding.

I wish there were more expert cross-country pilots to fly with, in my area.

I would like to glide more but the cost is prohibitive.

Gliding activity is restricted by the amount of regulation.

My club has enough single-seater gliders.

6. Gliding appeal

Tell us why you enjoy gliding. Please rate each of the following statements in a scale from 1 to 5, 1 if you strongly disagree, 5 if you strongly agree.

I love silent flight

I enjoy the technical aspects

It is a great challenge

I love the adventure

I enjoy the competition

I love the adrenalin

I have created many lasting friendships

I enjoy the social scene

I enjoy that it is a multi-disciplinary sport

It is a peaceful experience

It is an extreme sport

It is a beautiful sport

I enjoy the sense of exploration

Gliding is cool

Gliding is an eco-friendly sport

It is a cheap way to fly

Gliding is more available where I fly than other types of aviation

I enjoy the camaraderie

It is a great way to acquire basic flying skills

It is addictive

It is an intellectual sport

This sport was made for me

7. Wish list

What would you wish for, if you could change something in gliding? Please choose and rank the three most important things for you from the following list.

I wish my friends knew more about gliding.

I wish it were easier to go fly somewhere exotic.

I wish I could combine my vacations with some flying.

I wish my family/friends could participate more in my gliding-related activities.

I wish I could see gliding on TV.

I wish it were easier to go fly somewhere with excellent soaring conditions.

wish we could secure more airspace for gliding.

I wish it were easier to introduce people to gliding.

I wish it were cheaper to participate in gliding.

I wish there were more glider pilots where I fly.