Research Method

QUALITATIVE RESEARCH
Focus groups with key audiences to create a comprehensive list of all the possible attributes that define flying club membership experiences.

QUANTITATIVE RESEARCH
Random-sample survey of general aviation pilots (including flying club members and non-members) to measure perceptions of flying club experiences along all of the possible attributes identified in qualitative research.

STATISTICAL MODELING
Advanced modeling analysis on survey data to develop a customized model of the flying club experience (isolate the discrete drivers that define the flying club experience, measure the relationship between drivers, determine impact of each driver and measure how club experiences are perceived along each.)

The Flying Club Model
Methodology

APCO Insight conducted this study among a national sample of 801 “active” pilots. Active pilots are individuals with a current pilot’s certificate who have renewed their medical certificate in the last two years. Pilots were screened from a random sample of the publicly available FAA database and supplemented by AOPA’s Membership database. The data has been weighted to reflect the geographic distribution of pilots according to the FAA database.

Survey Population: Active Pilots

Respondent Eligibility: Pilot license and current medical certificate

Sample Design: Random sample from FAA and AOPA Membership database

Sample Size & Margin of Error: n=801 (± 3.5%)

Incidence: 51%

Data Collection Methodology: Screened RDD CATI (Telephone)

Interview Dates: February 16 – 28, 2012

Red arrows indicate a statistically significant change of total sample surveyed at the 95% confidence level.
Sample Characteristics

**Region**
- Northeast: 18%
- Midwest: 25%
- South: 26%
- West: 31%

**Gender**
- Male: 96%
- Female: 4%

**Age**
- 18-29: 5%
- 30-39: 8%
- 40-49: 17%
- 50-59: 28%
- 60-74: 35%
- 75+: 7%

**Ethnicity**
- White: 93%
- Hispanic or Latino: 2%
- African-American: 1%
- Asian/Other: 5%

**Membership**
- Flying club member: 55%
- Not a flying club member: 45%

**Leader Status**
- Flying club leader: 18%
- Not a flying club leader: 82%

**Training**
- FAA approved part 141 school: 19%
- Part 61 school or FBO: 47%
- Flying club: 14%
- Other/DK/RF: 20%

**Reason for Aviation Interest**
- Commercial pilot: 17%
- Recreation only: 42%
- Business and recreation: 34%
- Business only/ Other: 6%
Flying Clubs: A Familiar Model

- A surprisingly high 56% report that they are current or former members of a flying club.
- Recreational flyers report the highest club participation.
- Importantly, high participation rates suggest the club model is a familiar one: enough understanding to know the issues and opportunities.

Are you a member of a flying club?

- Current member: 56%
- Former member: 34%
- Never a member: 45%

Q5. Have you ever been a member of a flying club?
Q5A. [IF Q5=YES] Are you currently a member?
Flying Club Leaders

- An audience segment, called “flying club leaders,” identifies members who either serve on the board or are involved in at least three club responsibilities.
- A relatively activist audience: 12% have shown leadership behaviors.

### Flying Club Responsibilities

<table>
<thead>
<tr>
<th>Question</th>
<th>% Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you make decisions on which airplanes your club will buy or rent in your flying club’s fleet?</td>
<td>30%</td>
</tr>
<tr>
<td>Do you help with determining how many members the club will have?</td>
<td>25%</td>
</tr>
<tr>
<td>Are you involved in deciding on vendors or support services for maintenance and cleaning of the aircrafts?</td>
<td>25%</td>
</tr>
<tr>
<td>Are you involved in determining a scheduling process for flying the aircraft(s)?</td>
<td>25%</td>
</tr>
<tr>
<td>Do you oversee the process of properly maintaining aircraft paperwork, scheduling required maintenance and inspections?</td>
<td>21%</td>
</tr>
<tr>
<td>Are you involved in determining which aircraft insurance plan is best suited to meet the needs of your club?</td>
<td>19%</td>
</tr>
<tr>
<td>Are you involved in establishing or monitoring the system for billing the members of your flying club?</td>
<td>15%</td>
</tr>
<tr>
<td>Do you help prepare reports estimating the operating costs of the flying club from year to year?</td>
<td>15%</td>
</tr>
<tr>
<td>Are you involved in organizing tie-down or rental agreements?</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Flying Club Leaders = Board Members OR “Yes” to 3+ responsibilities**

- **Board Membership**: 88%
- **Responsibilities**: 12%

Q9. [IF Q5 = YES] Do you currently sit on the Board of Directors of your flying club?
Q10. [IF Q5=YES] To better understand your role in your flying club, I will read a list of duties and responsibilities of some flying club members. For each one, please tell me “yes” or “no” as they pertain to your involvement in your flying club.
The Environment for General Aviation
Strong Pessimism

- The status quo is unacceptable: fully 77% think the environment for GA is deteriorating.
- Older pilots – the largest segment – are the most pessimistic.
- This is an environment in which new offerings from AOPA will be received with interest.

Generally speaking, do you believe that the environment for general aviation is getting significantly better, somewhat better, somewhat worse, or significantly worse?

- 77% worse
- 54% worse
- 23% worse
- 17% better
- 1% better
- DK/RF=5%

Q1. Generally speaking, do you believe that the environment for general aviation is getting significantly better, somewhat better, somewhat worse, or significantly worse?
When asked to recall the biggest challenges facing general aviation, pilots cite various cost-related problems – particularly the cost of fuel (44%).

Regulatory problems also emerge clearly.

However, though cost helps explain pessimism, it is not an insurmountable barrier: fuel is a marginal variable cost, not a deal-breaker by itself.
Fewer Flight Hours Ahead

- A majority of pilots (55%) expect to be flying less in the upcoming year.
- Only 36% think they will be flying more, however this is higher among younger pilots (56%) and those who fly for both business and recreation (42%).

Q3. Thinking ahead, in the upcoming year, do you expect to fly more hours, fewer hours or about the same number of hours?
But Few Will Leave General Aviation

- Fully 93% of pilots say that they are likely to remain active as pilots looking ahead a few years – 78% feel strongly.
- Not surprisingly, only the oldest pilots are anticipating inactivity.

Now thinking ahead a few years, are you very likely, somewhat likely, somewhat unlikely or very unlikely to remain active as a pilot?

<table>
<thead>
<tr>
<th>Likely</th>
<th>Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very</td>
<td>Somewhat</td>
</tr>
<tr>
<td>% Very Likely</td>
<td></td>
</tr>
<tr>
<td>Flying club member</td>
<td>75%</td>
</tr>
<tr>
<td>Flying club leader</td>
<td>77%</td>
</tr>
<tr>
<td>FAA approved part 141 school</td>
<td>81%</td>
</tr>
<tr>
<td>Part 61 school or FBO</td>
<td>82%</td>
</tr>
<tr>
<td>Flying club</td>
<td>69%</td>
</tr>
<tr>
<td>Commercial pilot</td>
<td>87%</td>
</tr>
<tr>
<td>Recreation only</td>
<td>73%</td>
</tr>
<tr>
<td>Business and recreation</td>
<td>81%</td>
</tr>
<tr>
<td>Business only/Other</td>
<td>76%</td>
</tr>
<tr>
<td>Northeast</td>
<td>76%</td>
</tr>
<tr>
<td>Midwest</td>
<td>84%</td>
</tr>
<tr>
<td>South</td>
<td>74%</td>
</tr>
<tr>
<td>West</td>
<td>78%</td>
</tr>
<tr>
<td>18 - 29</td>
<td>84%</td>
</tr>
<tr>
<td>30 - 39</td>
<td>89%</td>
</tr>
<tr>
<td>40 - 49</td>
<td>85%</td>
</tr>
<tr>
<td>50 - 59</td>
<td>87%</td>
</tr>
<tr>
<td>60 - 74</td>
<td>70%</td>
</tr>
<tr>
<td>75+</td>
<td>48%</td>
</tr>
</tbody>
</table>

Q4. Now thinking ahead a few years, are you very likely, somewhat likely, somewhat unlikely or very unlikely to remain active as a pilot?
The Flying Club Experience
Clubs: A Valuable Experience

• Flying club membership is rated as a valuable experience – with high intensity at 67%.
• This represents good “brand equity” for the club experience.

Thinking about your most recent flying club experience, would you rate the value of your membership experience as…

- Very | Somewhat

96% | 67% | 29% | 4% | 3% | 1%

Q6. [IF Q5=YES] Thinking about your most recent flying club experience, would you rate the value of your membership experience as…

- Very Good
- Good
- Somewhat
- Bad

n=444
DK/RF=1%

% Very Good

- Flying club member 67%
- Flying club leader 82%
- FAA approved part 141 school 74%
- Part 61 school or FBO 66%
- Flying club 73%
- Commercial pilot 63%
- Recreation only 72%
- Business and recreation 64%
- Business only/Other 56%
- Northeast 78%
- Midwest 64%
- South 69%
- West 62%
- 18 - 29 64%
- 30 - 39 83%
- 40 - 49 66%
- 50 - 59 68%
- 60 - 74 61%
- 75+ 75%

© 2012 Aircraft Owners and Pilots Association
Why a Good Club Experience?

Open-ended questioning about their experience shows a high level of satisfaction with the savings they realized.

Shared responsibility for maintenance and management is also appreciated.

However, taken together, 38% cite social and knowledge-sharing opportunities (which are unique to the social structure of the club environment).

**What are the good things about belonging to a flying club?**

- Less expensive than owning an aircraft: 56%
- Access to a variety of aircraft: 29%
- Defrayed cost and shared responsibilities: 21%
- Pilot camaraderie: 21%
- Shared-knowledge with other pilots/instructors: 17%
- No maintenance: 9%
- Ability to rent aircraft: 4%
- Other: 7%

*n=726*
Why a Bad Club Experience?

Confirming focus group discussion, difficulty in scheduling the aircraft of choice (competition with other members) is the most common complaint.

Poor quality aircraft is also an issue.

What are the bad things about belonging to a flying club?

- Scheduling: 37%
- Limited aircraft availability: 23%
- Rental costs: 19%
- Poor aircraft conditions: 12%
- Lack of freedom: 8%
- Personality conflicts: 4%
- Lack of shared responsibility: 3%
- Restrictions: 3%
- Other: 4%
- Nothing: 9%

Q7B. [IF Q5=YES AND Q6=BAD (3 or 4)] What are the bad things about belonging to a flying club?
In Their Own Words

Positive

“You get to be with other people who have the same interests.”

“The sharing of fixed expenses (insurance, maintenance, hangar) in exchange for minor scheduling inconvenience was the primary advantage for me. Most clubs also host occasional social events.”

“The ability to share in a fine quality aircraft with limited expense. To be with people with similar interest who like to do what you like to do.”

“It’s very safe; it costs a little less and you have the opportunity to work on the aircraft and can receive advice from other pilots and instructors.”

“1. Cheaper to rent if you fly often. 2. Sense of community among members.”

Negative

“There are more restrictions than owning my own plane, and scheduling conflicts with other members which may come up.”

“Difficult to make changes to plane and other members may not treat plane as I would.”

“Careless members can affect the ability of other members to fly by damaging aircraft or not following simple rules.”

“10% of the members do all the work for the other 90%.”

“Uncertain availability on any given date and the lack of control over aircraft maintenance. The chance that another pilot might do something that renders the aircraft unsafe without your knowledge.”
A friendly atmosphere and affordable rental rates receive strong approvals.

However, note response to availability of flight instructors: clubs play a mediating role in pilot training.

Given high ratings for affordability, can we argue that cost is the decisive issue?

Relatively poor performance on events, aircraft equipment and providing incentives to fly.

Q8. [IF Q5=YES] Now I’ll read several features of flying clubs. After each one, please rate your flying club experience on this subject as excellent, good, only fair or poor. First...

<table>
<thead>
<tr>
<th>Feature</th>
<th>% Excellent</th>
<th>% Good</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>A friendly atmosphere for members</td>
<td>44%</td>
<td></td>
<td>88%</td>
</tr>
<tr>
<td>Affordable rental rates</td>
<td>33%</td>
<td>50%</td>
<td>83%</td>
</tr>
<tr>
<td>Access to good flight instructors</td>
<td>37%</td>
<td>41%</td>
<td>78%</td>
</tr>
<tr>
<td>Maintenance of club aircraft</td>
<td>34%</td>
<td>44%</td>
<td>78%</td>
</tr>
<tr>
<td>Management of the club by the board of directors</td>
<td>26%</td>
<td>49%</td>
<td>75%</td>
</tr>
<tr>
<td>Learning opportunities to improve pilot skills</td>
<td>29%</td>
<td>46%</td>
<td>75%</td>
</tr>
<tr>
<td>Insurance coverage to protect members</td>
<td>25%</td>
<td>48%</td>
<td>73%</td>
</tr>
<tr>
<td>Support for members seeking advanced ratings</td>
<td>28%</td>
<td>40%</td>
<td>68%</td>
</tr>
<tr>
<td>Availability of aircraft when you want to fly</td>
<td>17%</td>
<td>50%</td>
<td>67%</td>
</tr>
<tr>
<td>Flight safety programs and training</td>
<td>23%</td>
<td>44%</td>
<td>67%</td>
</tr>
<tr>
<td>Adequate club finances</td>
<td>21%</td>
<td>45%</td>
<td>66%</td>
</tr>
<tr>
<td>Club facilities and meeting areas</td>
<td>19%</td>
<td>45%</td>
<td>64%</td>
</tr>
<tr>
<td>Social events and having a sense of community</td>
<td>21%</td>
<td>41%</td>
<td>62%</td>
</tr>
<tr>
<td>Incentives to encourage members to fly</td>
<td>14%</td>
<td>44%</td>
<td>58%</td>
</tr>
<tr>
<td>Modern equipment available on club aircraft</td>
<td>17%</td>
<td>41%</td>
<td>58%</td>
</tr>
<tr>
<td>Fly-ins and group flight activities</td>
<td>16%</td>
<td>32%</td>
<td>48%</td>
</tr>
</tbody>
</table>

n=444
Drivers of the Highest-Value Club Experience

Regression analysis isolates the features of flying clubs that, beyond the basics, drive the highest-value membership experiences.

Four elements of flying clubs are key to a positive experience:

- **Board management**
- **Friendly atmosphere**
- **Aircraft availability**
- **Knowledge and training opportunities**

Learning opportunities are a key feature of club structure.

Adj. $R^2 = .236$
Dependent Variable: Q6 (Flying club value)
Independent Variable: Q8series (Features of flying clubs)
Flying Club Value

• The dependent variable: how “valuable” are flying clubs to pilots?
• A skewed distribution and a highly regarded option for pilots.
• Flying clubs achieve higher value in more densely populated areas such as the Northeast (8.17).

Please rate how valuable flying clubs are for their members.

Q11. Whether or not you have direct experience in a flying club, and based just on your impression, please rate how valuable flying clubs are for their members.
Comprehensive Flying Club Model

Optimal Flying Club Experience

BENEFITS
- Mentorship
- Instructor Standards
- Value
- Safety Education

FLEET
- Scheduling
- Aircraft Management
- Aircraft Selection

COMMUNITY
- Engagement
- Social Activities

GOVERNANCE
- Governance

RISK MANAGEMENT
- Risk Management
Comprehensive Flying Club Model

- 40 attributes are decisive — correlating into 11 discrete factors (10 attributes fell from the model).
- Correlations between factor groups define five broader themes (second-order factors).
- The Mentorship and Instructor Standards factors are unique and directly linked to club social structure.
- Fleet factors are decidedly practical considerations.
- Community is a constant feature of involvement in GA.
- Governance and Risk Management are basic club infrastructure.
Mentorship

- Provides encouragement and recognition for members who achieve advanced ratings.
- Arranges for experienced pilots to mentor new students.
- Provides mentors for members seeking to improve their flying skills.
- Foster an environment that encourages members to help each other improve their skills.

• These mentoring attributes are likely to occur only in a club environment.
• Expectations are that the club provides these opportunities as a function of the relationships inherent in members.
Instructor Standards

- Club members are aware of the fact that CFIs are also members and that expectations for quality instruction are high.
- Social pressures and greater awareness of student experiences change the flight training dynamic from that of schools or FBOs.
• Perceived value is broader than simple cost considerations.
• Pilots expect clubs to “connect” them with other resources and third-party opportunities.
## Safety Education

<table>
<thead>
<tr>
<th>BENEFITS</th>
<th>FLEET</th>
<th>COMMUNITY</th>
<th>GOVERNANCE</th>
<th>RISK MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mentorship</td>
<td>Scheduling</td>
<td>Engagement</td>
<td>Governance</td>
<td>Risk Management</td>
</tr>
<tr>
<td>Instructor Standards</td>
<td>Aircraft Management</td>
<td>Social Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value</td>
<td>Aircraft Selection</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safety Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Hosts learning sessions and speakers for member education.
- Has regular safety seminars for members.
- Provides maintenance training opportunities for members.
- Organize tours of FAA facilities and meetings with controllers.

- The club relationship is well positioned to foster a culture of safety for its members.
- The club is the catalyst for learning that would otherwise be difficult to obtain.
Scheduling

- **BENEFITS**
  - Mentorship
  - Instructor Standards
  - Value
  - Safety Education

- **FLEET**
  - Scheduling
  - Aircraft Management
  - Aircraft Selection

- **COMMUNITY**
  - Engagement
  - Social Activities

- **GOVERNANCE**
  - Governance

- **RISK MANAGEMENT**
  - Risk Management

- **• Scheduling** – the most common criticism – is a key expectation.
- **• Overnight opportunities** are an “ownership-like” attribute of clubs.
- **• Online tools** are highly regarded.

**Offers flexible scheduling for members planning trips.**

**Scheduling is easily done online.**

**Allows members to keep aircraft overnight on trips at low costs.**
Managing the aircraft relieves the burden from members and provides reassurance.

Fleet management also envisions periodic upgrades of aircraft.

- Aircraft are well maintained and proper records are kept.
- Board of directors ensures that maintenance reserves are adequate.
- Maintains adequate cash reserves for maintenance and upgrades.
Aircraft Selection

- Can we get the type airplane we want when we want it?
- Clubs provide choices and equipment suitable to the interests and skills of members.

Offers a good selection of aircraft to rent.
Avionics in club aircraft are kept up to date.
Has high quality aircraft available for members.
Ensures that enough aircraft are available for the size of the membership.
Adapt aircraft fleet to changing member interests.
Engagement

- Clubs are also expected to act as advocates for general aviation in the community; to nurture GA.
- These community activities may also enhance the aviation interest of club members.

- Works to keep members active in general aviation.
- Hosts aviation events for young people to interest them in flying.
- Promotes general aviation to the larger community.
Social Activities

- Social activities are a way to deepen member relationships, an important precondition to the other benefits associated with club membership.
- A gathering place that encourages interaction and information sharing.

- Hosts social events for members and their families.
- Organizes group flying events and fly-ins.
- Has common area for pilots to socialize and share information.
Governance

- Club administration and management are burdens that should be delegated to competent people.
- Transparency and interactivity with the membership are key attributes.
- Moreover, concerns that decisions can cause conflict put a premium on cooperation.

Board of directors provides useful information to members.
Members are invited to participate in managing the club.
Reports accurate club finances to the membership.
Consults with members on aircraft decisions.
Fosters a cooperative atmosphere on club decisions.
A single-metric factor that is often taken for granted by members.

Insurance coverage is best provided by club policies and can allay any liability concerns.

Eliminates member liability for aircraft damage
The unique environment that a club can create explain most of the experience. A combination of the social and the practical.

Indeed, the benefits of club membership related to the relationships established are at least as important as access to aircraft.

Insofar as aircraft are a base-case expectation, the benefits story is the decisive “branding” element of a valuable flying club.

Benefits are the dominant theme for members, while the more practical Fleet theme appeals to non-members who may not realize the distinct benefits of club membership.
Output: Measures that Matter

The model provides three separate measurements that can be tracked over time:

**Performance Scores:** Depict how well flying club experiences perform along each of the eleven dimensions of reputation. The score is based on a scale from one to ten.

**Reputation Impact:** Measures the extent to which each of the factors drive overall opinion. These scores are presented in percentage terms to indicate the relative strength of the factor.

**Reputation Index:** An overall measure of the club experience. The index is a number between 10 and 100 that takes into account both performance scores and reputation impact of the factors.
Strengths and Weaknesses for Flying Clubs

<table>
<thead>
<tr>
<th>IMPACT SCORE</th>
<th>INDEX SCORE: 75.0</th>
<th>PERFORMANCE SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.1%</td>
<td>Scheduling</td>
<td>8.3</td>
</tr>
<tr>
<td>14.8%</td>
<td>Value</td>
<td>6.8</td>
</tr>
<tr>
<td>12.8%</td>
<td>Aircraft Management</td>
<td>8.9</td>
</tr>
<tr>
<td>11.8%</td>
<td>Safety Education</td>
<td>6.5</td>
</tr>
<tr>
<td>11.8%</td>
<td>Social Activities</td>
<td>6.1</td>
</tr>
<tr>
<td>11.5%</td>
<td>Instructor Standards</td>
<td>8.1</td>
</tr>
<tr>
<td>8.6%</td>
<td>Governance</td>
<td>7.7</td>
</tr>
<tr>
<td>7.7%</td>
<td>Aircraft Selection</td>
<td>8.0</td>
</tr>
<tr>
<td>5.8%</td>
<td>Mentorship</td>
<td>7.1</td>
</tr>
<tr>
<td>3.4%</td>
<td>Engagement</td>
<td>7.2</td>
</tr>
<tr>
<td>2.9%</td>
<td>Risk Management</td>
<td>7.4</td>
</tr>
</tbody>
</table>

Relative strength of the factor in driving overall satisfaction.

*Performance Score scale lines represent confidence interval of .157
Experience Matrix – Total Sample

- Beyond the basics (aircraft management and scheduling) Instructor Standards are a key strength and can distinguish a club.
- However, there is some “low-hanging fruit” to build loyalty.
- Clubs have some work to do to make Value a key strength. This is an easy story to tell and should inform club programs.
- Similarly, highlighting Safety Education should be a priority communications initiative by flying clubs.
Key Findings and Recommendations
Clubs Meet Distinctive Needs

Clubs are a well-known model that offer answers in a bad GA environment.

Clubs have equity that can accommodate a more distinctive offer.

- The outlook for general aviation is negative: pilots see things getting worse and expect to reduce flying hours.
- Focus groups expressed doubt about the ability of GA businesses to meet the needs of pilots in this environment.
- However, flying clubs are well-known and well positioned to speak to key concerns and aspirations. A surprisingly high percentage of pilots have experience and knowledge of clubs.
- The club experience is strongly positive and any offer will be of interest to pilots.
- Importantly, the distinctive social elements of a club set the stage for more compelling benefits that align with higher pilot aspirations.
- The membership model makes aircraft choice, and learning opportunities more achievable for pilots.
The club model values membership benefits over practical issues.

Clubs empower me as a pilot and connect me to other GA resources.

- Initial considerations are practical concerns about access to reliable aircraft and scheduling. A desire to fly more easily explains interest in clubs.
- However, access to committed flight instructors emerges an initial strength; suggesting that the education dynamic is already part of the club story.
- Practical issues can emulate aircraft ownership with schedule flexibility and minimal burden.
- However, membership benefits are more evocative story:
  - Social attributes create an atmosphere where plots can learn and experience what they would not on their own;
  - Membership of CFI’s in the club changes expectations for instructors and improves likelihood of student success;
  - Members and the organization provide me with added value and relationships with third parties;
  - I’m more likely to grow as a pilot.
### Model Summary – Non-Member

<table>
<thead>
<tr>
<th>IMPACT SCORE</th>
<th>INDEX SCORE: 76.1</th>
<th>PERFORMANCE SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.9%</td>
<td>Aircraft Management</td>
<td>8.8</td>
</tr>
<tr>
<td>18.6%</td>
<td>Mentorship</td>
<td>7.2</td>
</tr>
<tr>
<td>18.1%</td>
<td>Scheduling</td>
<td>8.3</td>
</tr>
<tr>
<td>15.8%</td>
<td>Safety Education</td>
<td>6.6</td>
</tr>
<tr>
<td>11.3%</td>
<td>Aircraft Selection</td>
<td>8.0</td>
</tr>
<tr>
<td>10.5%</td>
<td>Social Activities</td>
<td>6.1</td>
</tr>
<tr>
<td>2.3%</td>
<td>Governance</td>
<td>7.7</td>
</tr>
<tr>
<td>2.0%</td>
<td>Value</td>
<td>7.2</td>
</tr>
<tr>
<td>1.2%</td>
<td>Risk Management</td>
<td>7.3</td>
</tr>
<tr>
<td>0.7%</td>
<td>Instructor Standards</td>
<td>8.1</td>
</tr>
<tr>
<td>0.7%</td>
<td>Engagement</td>
<td>7.4</td>
</tr>
</tbody>
</table>

Relative strength of the factor in driving overall satisfaction.

*Performance Score scale lines represent confidence interval of .235*
Non-members have extremely divergent views towards flying clubs.

- Value is not important to this audience as it was to others.

- The ability to fly whenever you want (Scheduling) and confidence in the aircraft (Aircraft Management) is what matters most to non-members.
Model Summary – Member

Impact Score

- Value: 6.5
- Scheduling: 8.3
- Governance: 7.7
- Instructor Standards: 8.2
- Social Activities: 6.0
- Mentorship: 7.0
- Safety Education: 6.4
- Aircraft Selection: 7.9
- Engagement: 7.0
- Risk Management: 7.5
- Aircraft Management: 8.9

Index Score: 72.7

© 2012 Aircraft Owners and Pilots Association
Members have very different expectations of flying clubs – they see **Value** as a critical weakness – giving reason to address the importance of flying clubs to the overall GA population.

- **Scheduling**, **Governance**, and **Instructor Standards** are all factors that will influence a member’s opinion of value towards the flying club.
Relative strength of the factor in driving overall satisfaction.

<table>
<thead>
<tr>
<th>IMPACT SCORE</th>
<th>INDEX SCORE: 74.6</th>
<th>PERFORMANCE SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.7%</td>
<td>Scheduling</td>
<td>8.4</td>
</tr>
<tr>
<td>16.8%</td>
<td>Mentorship</td>
<td>7.2</td>
</tr>
<tr>
<td>16.4%</td>
<td>Value</td>
<td>6.0</td>
</tr>
<tr>
<td>12.8%</td>
<td>Governance</td>
<td>8.4</td>
</tr>
<tr>
<td>9.8%</td>
<td>Safety Education</td>
<td>6.4</td>
</tr>
<tr>
<td>6.7%</td>
<td>Engagement</td>
<td>7.2</td>
</tr>
<tr>
<td>4.8%</td>
<td>Aircraft Management</td>
<td>9.1</td>
</tr>
<tr>
<td>4.0%</td>
<td>Instructor Standards</td>
<td>8.2</td>
</tr>
<tr>
<td>2.5%</td>
<td>Social Activities</td>
<td>6.1</td>
</tr>
<tr>
<td>1.8%</td>
<td>Risk Management</td>
<td>7.3</td>
</tr>
<tr>
<td>1.6%</td>
<td>Aircraft Selection</td>
<td>7.8</td>
</tr>
</tbody>
</table>

*Performance Score scale lines represent confidence interval of .400
Reputation Matrix – Leaders

- The core strength among leaders is **Scheduling**.

- Not even flying club leaders are convinced of club value – **Value** received the lowest performance scores among this audience.
Factor Descriptions
**Flying Club Model Summary**

### BENEFITS

**Mentorship**
- Provides encouragement and recognition for members who achieve advanced ratings.
- Arranges for experienced pilots to mentor new students.
- Provides mentors for members seeking to improve their flying skills.
- Foster an environment that encourages members to help each other improve their skills.

**Instructor Standards**
- Has high standards for flight instructors teaching through the club.
- Examines the qualifications of flight instructors teaching at the club.
- Has long-term relationships with flight instructors for the benefit of the members.

**Value**
- Offers blocks of aircraft time at reduce hourly cost.
- Aircraft rental rates are kept as low as possible.
- Makes inexpensive simulator time available for members.
- Partners with other flying clubs on education and training efforts.
- Offers attractive terms for aircraft owners to make their planes available to members.
- Seeks reciprocal agreements with other flying clubs to allow use of their aircraft.

**Safety Education**
- Hosts learning sessions and speakers for member education.
- Has regular safety seminars for members.
- Provides maintenance training opportunities for members.
- Organize tours of FAA facilities and meetings with controllers.

### FLEET

**Scheduling**
- Offers flexible scheduling for members planning trips.
- Scheduling is easily done online.
- Allows members to keep aircraft overnight on trips at low costs.

**Aircraft Management**
- Aircraft are well maintained and proper records are kept.
- Board of directors ensures that maintenance reserves are adequate.
- Maintains adequate cash reserves for maintenance and upgrades.

**Aircraft Selection**
- Offers a good selection of aircraft to rent.
- Avionics in club aircraft are kept up to date.
- Has high quality aircraft available for members.
- Ensures that enough aircraft are available for the size of the membership.
- Adapt aircraft fleet to changing member interests.

### COMMUNITY

**Engagement**
- Works to keep members active in general aviation.
- Hosts aviation events for young people to interest them in flying.
- Promotes general aviation to the larger community.

**Social Activities**
- Hosts social events for members and their families.
- Organizes group flying events and fly-ins.
- Has common area for pilots to socialize and share information.

### GOVERNANCE

**Governance**
- Board of directors provides useful information to members.
- Members are invited to participate in managing the club.
- Reports accurate club finances to the membership.
- Consults with members on aircraft decisions.
- Fosters a cooperative atmosphere on club decisions.

### RISK MANAGEMENT

**Risk Management**
- Eliminates member liability for aircraft damage
2012 Flying Club Survey
Methodology and Notes

• On June 22, 2012 an e-mail survey was sent to 570 club contacts
• 163 contacts responded and 109 completed the survey
• This number of responses allows for a margin of error of 8.45% at the 95% confidence level
The average number of years the surveyed clubs have been in operation is 40 years.

The average number however does not indicate the wide variation in years of operation, more than half of all clubs are less than 40 years in operation, and nearly 28% have been formed in the past 20 years.
# of Aircraft Available

- Nearly half of the survey panel has access to one or two aircraft in the club.
- The maximum number of aircraft available at a club was reported to be 60.
- In total ownership of 1,727 aircraft was claimed.
- This averages to 4.7 aircraft per club.

Question: How many aircraft do your club members have regular access to?
Base: N=367
Scale: n/a
**Type of Aircraft Available**

<table>
<thead>
<tr>
<th>Aircraft Type</th>
<th>1 aircraft</th>
<th>2 aircraft</th>
<th>3 aircraft</th>
<th>4 - 5 aircraft</th>
<th>6 - 10 aircraft</th>
<th>11 - 15 aircraft</th>
<th>16+ aircraft</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Engine</td>
<td>109</td>
<td>70</td>
<td>33</td>
<td>54</td>
<td>25</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>Single Engine - High Perf</td>
<td>85</td>
<td>36</td>
<td>7</td>
<td>5</td>
<td>6</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>Single Engine - Complex</td>
<td>70</td>
<td>19</td>
<td>4</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Multi Engine</td>
<td>14</td>
<td>4</td>
<td>4</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Light Sport</td>
<td>18</td>
<td>5</td>
<td>1</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Tailwheel</td>
<td>24</td>
<td>9</td>
<td>5</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Aerobatic</td>
<td>13</td>
<td>6</td>
<td>1</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Rotorcraft</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Float Plane</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Glider</td>
<td>1</td>
<td>2</td>
<td>6</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

- Chart indicates the number of clubs that utilize a particular type of aircraft
- Table identifies the number of clubs by both aircraft type and number of airplanes available

**Question:** Please indicate the type and number of aircraft available in your club:

**Base:** N=385

**Scale:** n/a

© 2012 Aircraft Owners and Pilots Association
Aircraft Ownership

- Nearly 73% of clubs own the aircraft used
- For the “Other” category, respondents indicated that the aircraft were owned by a corporation or by the US military branch

Question: Please indicate which aircraft ownership arrangements apply to your club:
Base: N=358
Scale: All aircraft are owned by the clubs (1), Some aircraft are owned by the club, some are leased (2), All aircraft are leased (3), Other (4)
Future Purchases

- Less than 25% of clubs plan to acquire additional aircraft

Question: Does your club plan to acquire or lease additional aircraft?
Base: N=355
Scale: Yes (1), No (2), Unsure (3)

- 50% of clubs intend to upgrade the equipment in an aircraft

Question: Does your club plan to upgrade the equipment in any aircraft?
Base: N=354
Scale: Yes (1), No (2), Unsure (3)
Aircraft Availability

- Nearly 60% of clubs does not consider aircraft availability to be an issue
- 35% report aircraft availability as a minor issue
- Less than 5% report aircraft availability as a very significant issue

**Question:** Now let's consider club aircraft. Generally speaking, is scheduling aircraft and aircraft availability for members a...

**Base:** N=358

**Scale:** very significant issue (1), minor issue (2), not an issue for members (3)
Aircraft Scheduling

- Most clubs utilize online scheduling software
- aircraftclubs.com and schedulemaster.com were the most frequently reported services used

Question: Does your club use online software for aircraft scheduling?
Base: N=358
Scale: Yes (1), No (2)

Yes: 83.0%
No: 17.0%
# of Club Members

- The average number of members per club is 35
- Over 1/3rd of all clubs have fewer than 20 members

Question: How many members currently belong to the club?

Base: N=355
Scale: n/a
Membership Trend

- For the majority of clubs, membership counts have remained the same in recent years.
- 30% of clubs have decreased membership
- 25% have increased membership

**Question:** In recent years, has club membership:

**Base:** N=368

**Scale:** Increased (1), Remained the Same (2), Decreased (3)
Membership Initiatives

• Nearly 75% of clubs seek to increase club membership

**Question:** Does your club seek to increase membership?
**Base:** N=369
**Scale:** Yes (1), No (2)

- Yes: 74.8%
- No: 25.2%

• Over 50% of clubs limit club members

**Question:** Does your club limit the number of members?
**Base:** N=370
**Scale:** Yes (1), No (2)

- Yes: 51.1%
- No: 48.9%
Club Attributes

Have a website or social media page like Facebook?
- Yes: 70.1%
- No: 28.8%
- Unsure/Does Not Apply: 1.1%

Have regular social events or club activities?
- Yes: 64.7%
- No: 34.8%
- Unsure/Does Not Apply: 0.5%

Offer non-flying social memberships?
- Yes: 26.8%
- No: 68.9%
- Unsure/Does Not Apply: 4.3%

Have a club house or common meeting area?
- Yes: 61.5%
- No: 37.7%
- Unsure/Does Not Apply: 0.8%

Organized as a non-profit?
- Yes: 72.5%
- No: 19.7%
- Unsure/Does Not Apply: 7.8%

Organized as a corporation or LLC?
- Yes: 71.8%
- No: 18.7%
- Unsure/Does Not Apply: 9.5%

Have written bylaws and rules?
- Yes: 95.2%
- No: 3.0%
- Unsure/Does Not Apply: 1.9%

Have a safety officer or safety committee?
- Yes: 63.1%
- No: 32.3%
- Unsure/Does Not Apply: 4.6%

Have officers and a board of directors?
- Yes: 91.4%
- No: 6.2%
- Unsure/Does Not Apply: 2.4%

Question: Now please indicate YES or NO. Does your club:
Base: N=372
Scale: Yes (1), No (2), Unsure/Does Not Apply (3)
Club Programs

Question: Now please consider club programs. Does your club:

Base: N=361
Scale: Yes (1), No (2), Unsure/Does Not Apply (3)

Have an A&P mechanic club member to provide maintenance?
- Yes: 37.7%
- No: 57.6%
- Unsure/Does Not Apply: 4.7%

Review the performance of flight instructors teaching members?
- Yes: 36.7%
- No: 50.4%
- Unsure/Does Not Apply: 12.9%

Require certified flight instructors to be members of the club?
- Yes: 36.1%
- No: 58.8%
- Unsure/Does Not Apply: 5.0%

Have certified flight instructors authorized by the club to train members?
- Yes: 87.4%
- No: 10.9%
- Unsure/Does Not Apply: 1.7%

Offer primary flight training for members?
- Yes: 63.0%
- No: 34.3%
- Unsure/Does Not Apply: 2.8%

Require regular pilot proficiency reviews for members?
- Yes: 69.1%
- No: 28.4%
- Unsure/Does Not Apply: 2.5%

Have regular safety training for members?
- Yes: 49.6%
- No: 46.2%
- Unsure/Does Not Apply: 4.2%
Questions: To close, please indicate how big a problem the following issues are for your club:

**Base:** N=352

**Scale:** Big Problem (1), Minor Problem (2), Not a Problem (3), Unsure (4)