



THE FLIGHT TRAINING EXPERIENCE

A Survey of Students, Pilots, and Instructors

October 2010

Background

- With more than 400,000 members, the Aircraft Owners and Pilots Association (AOPA) is the largest aviation association in the world. As a membership organization, AOPA offers a wide array of information and services for pilots, prospective pilots, and aviation enthusiasts. As an advocacy group, AOPA works tirelessly to preserve the freedom to fly.
- A key component of AOPA's work is a dedication to growing the pilot population. Approximately 60 percent of those who earn a student pilot certificate never earn a higher pilot certificate (e.g., private, recreational, or sport). And many more drop out before ever obtaining a student pilot certificate—placing the overall dropout rate at an estimated 70 to 80 percent.
- Although AOPA's *Let's Go Flying* program is designed to encourage prospective pilots to begin flight training, AOPA felt it was time to take a closer look at ways to help those who have already begun training earn a pilot certificate. These methods would complement the *Flight Training* magazine and website that currently serve the student pilot audience.
- There are many opinions about the state of flight training and how to improve it, but AOPA decided a deeper, more objective understanding of the flight training experience was critical to the success of any efforts to improve student retention. As part of the AOPA Flight Training Student Retention Initiative, AOPA commissioned an independent opinion research firm, APCO Insight®, to model the optimal primary flight training experience and determine where the actual experience fails to live up to students' expectations.

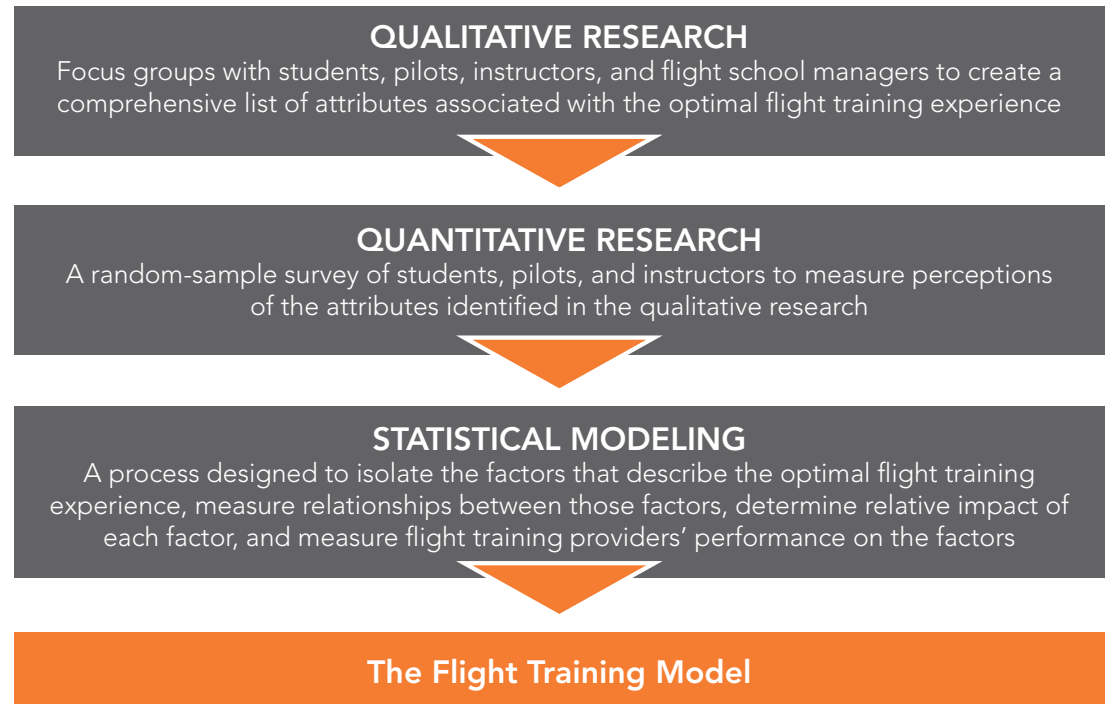


Research Objective

Beyond Customer Satisfaction

Will better alignment with student expectations improve success rates?

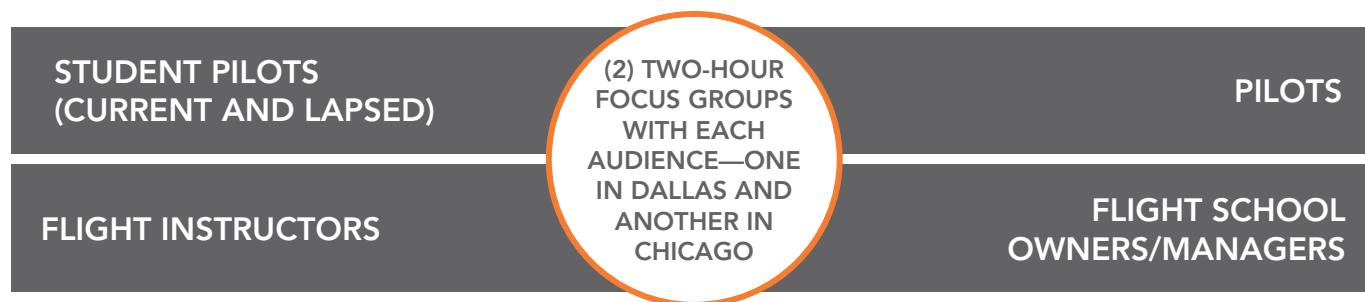
This research program enabled key audiences to define the optimal training experience and suggest alignment strategies.



Research Methodology

Qualitative Research Methodology

- The qualitative research focused on the shared set of experiences and challenges of all four groups. Recognizing that each group has an important perspective on the same set of issues, focus group findings were important in developing an initial list of attributes to describe the optimal flight training experience.

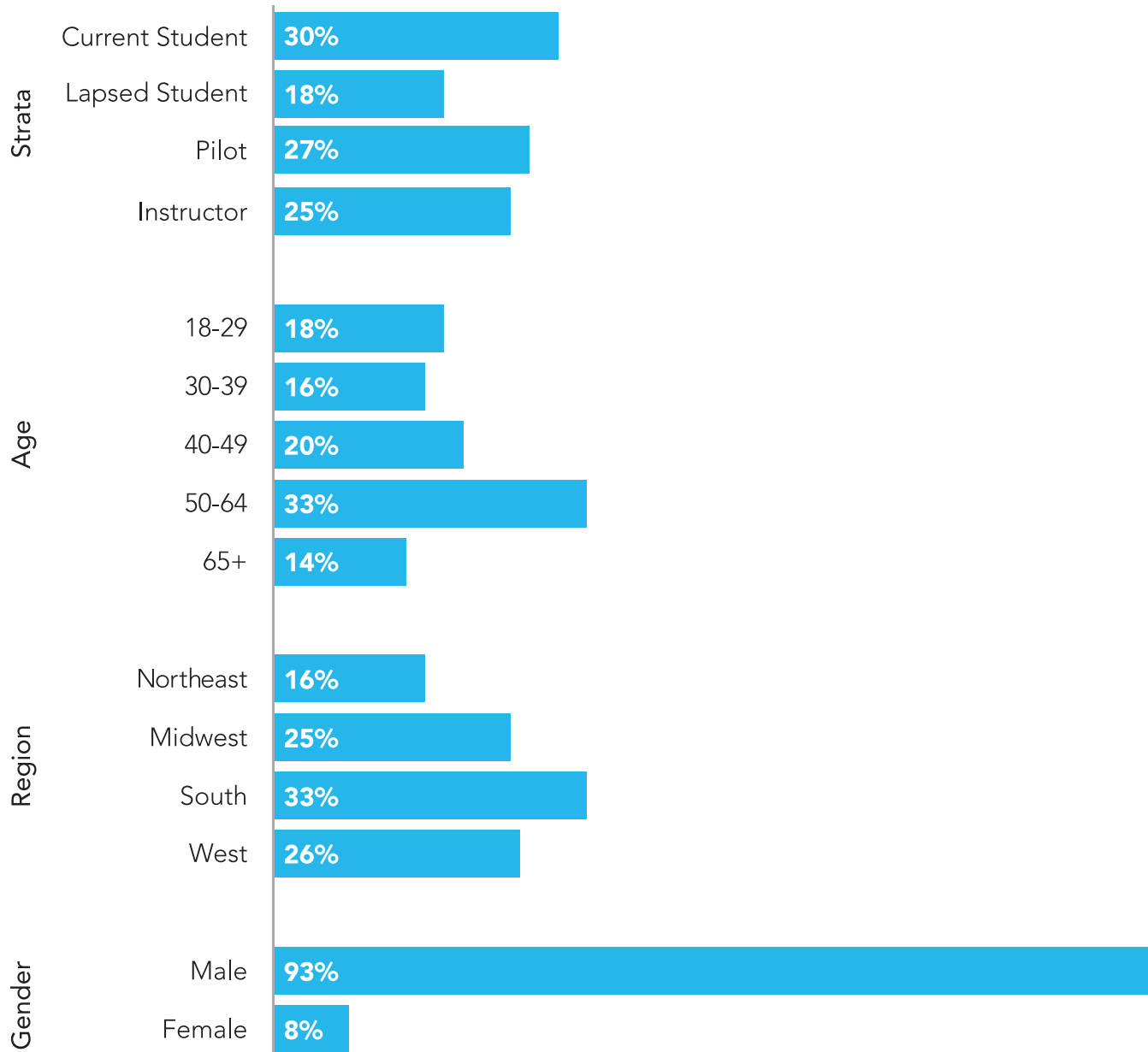


Quantitative Research Methodology

- The quantitative research focused on testing the attributes to develop a comprehensive model. Three of the four groups were sampled in the survey (flight school owners/managers were not included because some had not experienced primary flight training).

SPECIFICATION	DESCRIPTION	DETAILS
Sample Frame	Audience being surveyed	Students (Current and Lapsed), Pilots, Instructors
Sample Design	Source of sample universe	Listed sample from FAA Database
Sample Size	Random sample	N = 1,000
Sampling Error	Margin of error	3.0%
Confidence Interval	Attain margin of error	95%
Data Collection	Mode of conducting interviews	Telephone and Online
Incidence	Level of effort needed to reach eligible respondents	47%

Sample Characteristics



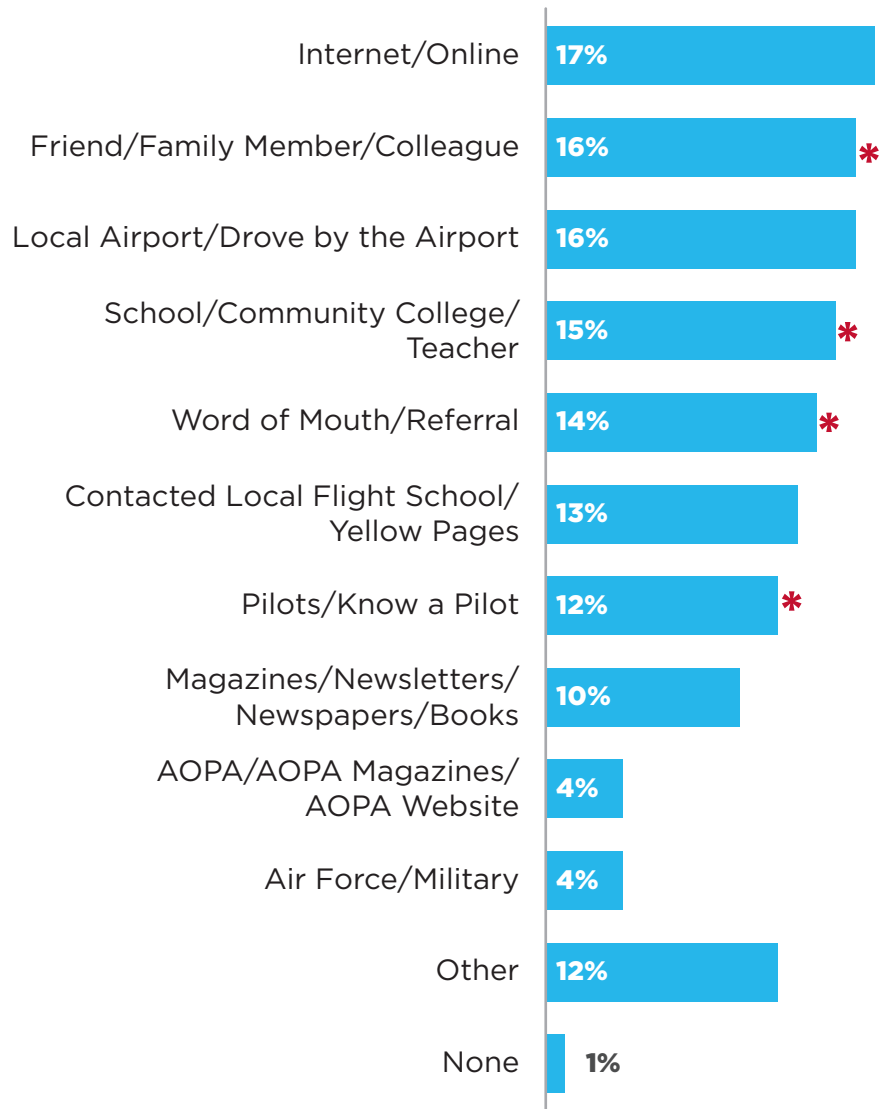
Percentages are rounded to the nearest whole number. As a result, some groups may total more or less than 100%.



The Flight Training Environment

Flight Training Information Sources

Information Sources



- The key information channels are person-to-person
- Traditional advertising venues are still important: 27 percent sought information from ads
- The move to the Internet is also apparent
- However, 57 percent* report they sought information on flight instruction from a **personal source**

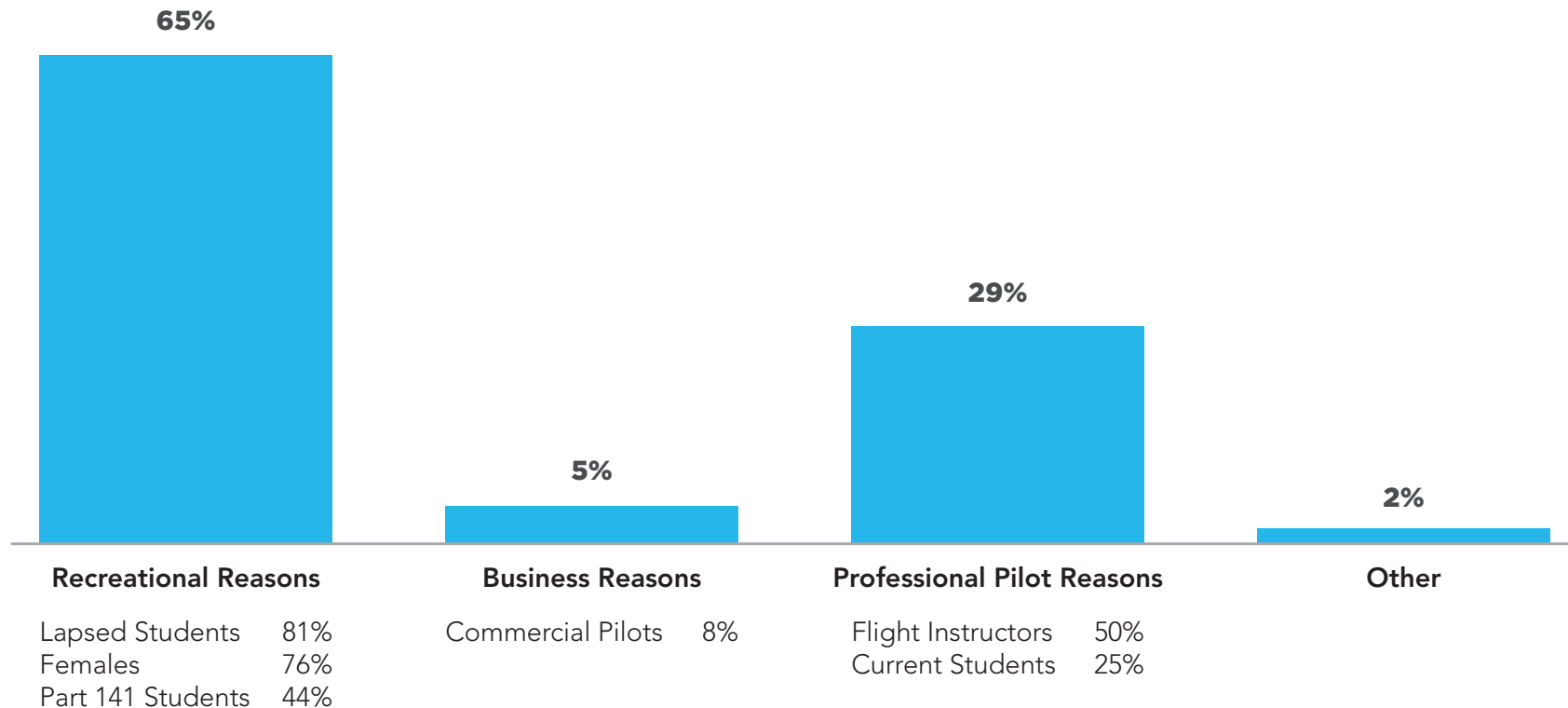
Q1. When you decided to learn to fly, what sources of information did you rely on to find flight instruction?

Open-ended question: Chart reflects multiple, verbatim responses therefore aggregate total will be more than 100%.

Primary Reason for Flight Training

- A large majority of pilots and students initially sought training for recreational reasons
- Only about one-third were primarily driven by business or professional interests
- Lapsed students are particularly focused on recreation
- Although all students must meet the same FAA Practical Test Standards, flight schools and instructors should adapt training approaches based on a student's motivation (e.g., recreational versus professional)

Primary Reason for Flight Training



STATISTICALLY SIGNIFICANT SUBGROUPS
(Only groups with significant differences are shown)

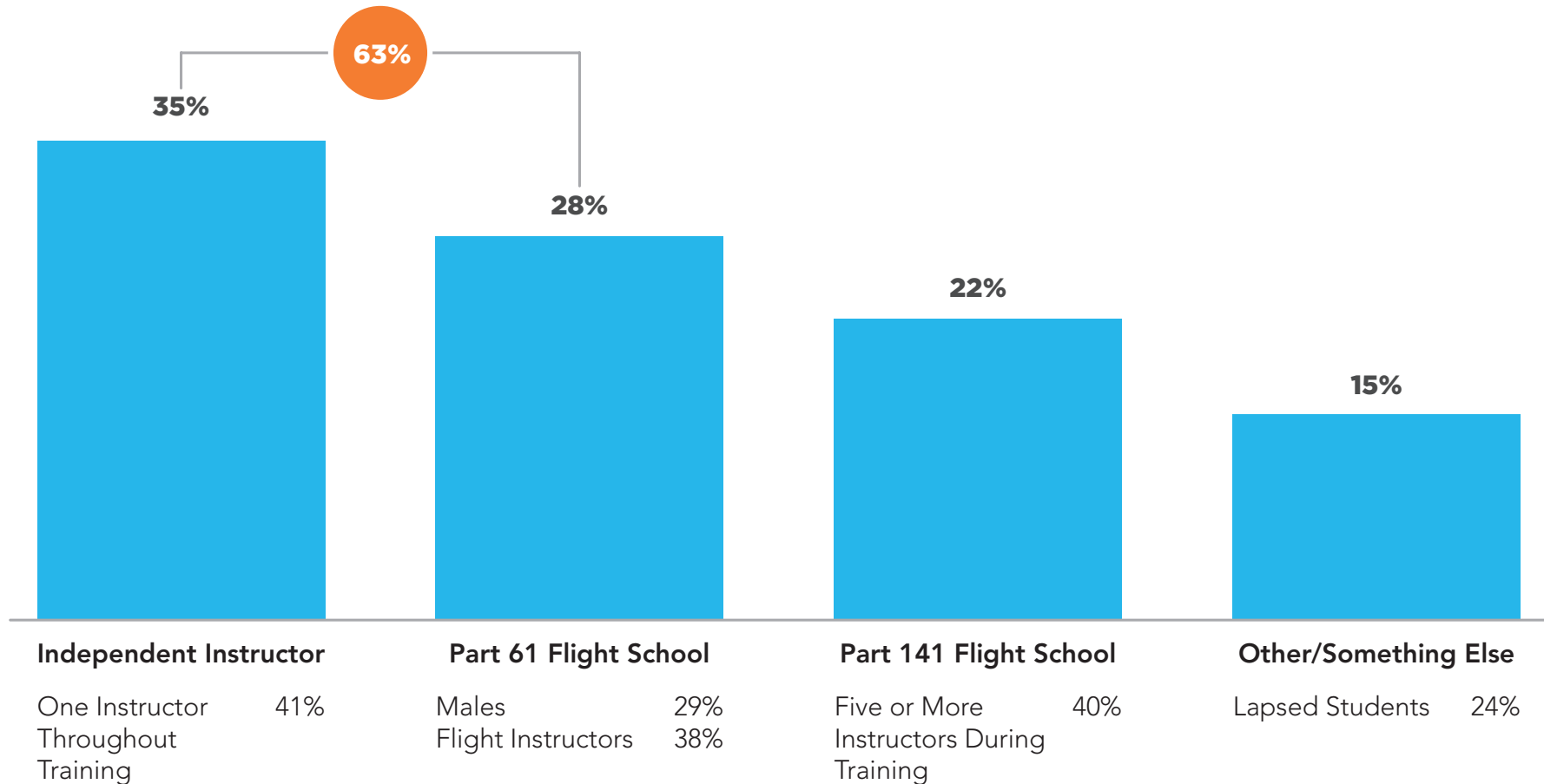
Q2. Did you seek flight training primarily for recreational reasons, business reasons, or to work professionally as a pilot?

Percentages are rounded to the nearest whole number. As a result, some groups may total more or less than 100%.

Profiles of Flight Instruction

- Independent instructors are a common provider of flight training
- Only one in five attended a Part 141 flight school

Profiles of Flight Instruction



STATISTICALLY SIGNIFICANT SUBGROUPS
(Only groups with significant differences are shown)

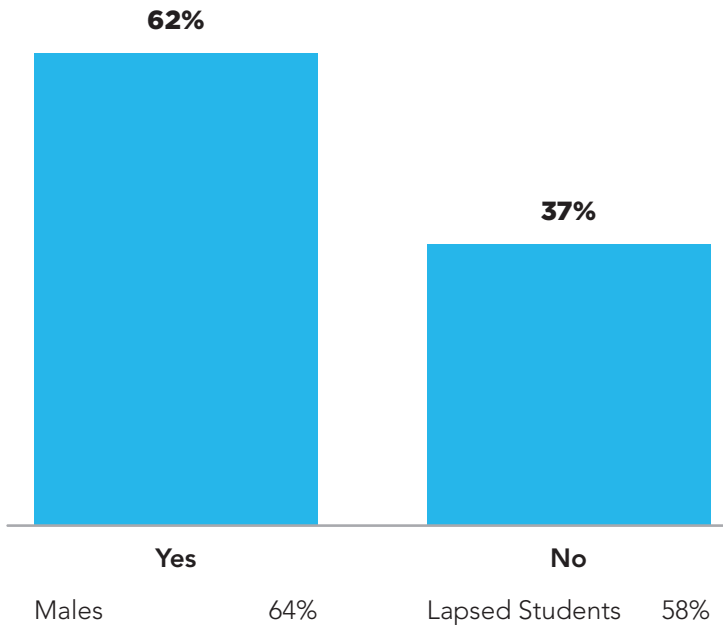
D3. In your private pilot training experience, did you take lessons with an independent instructor, a Part 61 flight school, a Part 141 flight school, or something else?

Percentages are rounded to the nearest whole number. As a result, some groups may total more or less than 100%.

Strong Internet Usage Patterns

- Nearly two-thirds report they seek information about flight training from online sources
- Respondents report a diverse array of websites commonly visited

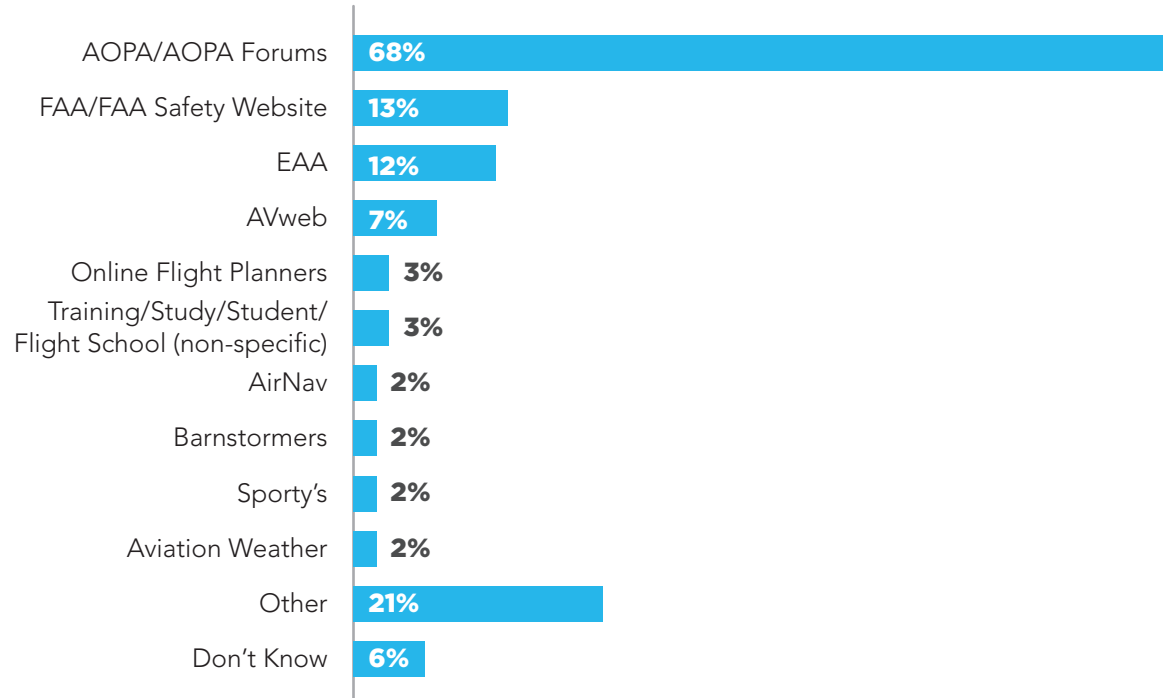
Get Flight Training Information Online



STATISTICALLY SIGNIFICANT SUBGROUPS
(Only groups with significant differences are shown)

D9. Do you regularly go to any websites to read about flying or flight training?

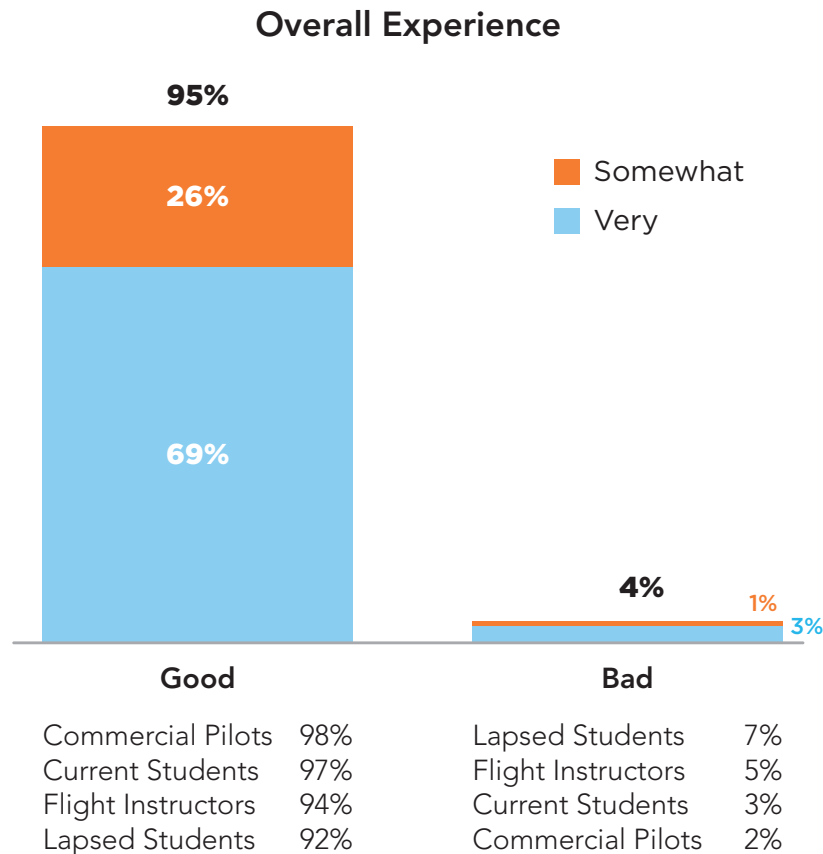
Websites Visited



D10. Which websites do you go to?

Open-ended question: Chart reflects multiple, verbatim responses therefore aggregate total will be more than 100%.

A Strongly Positive Experience



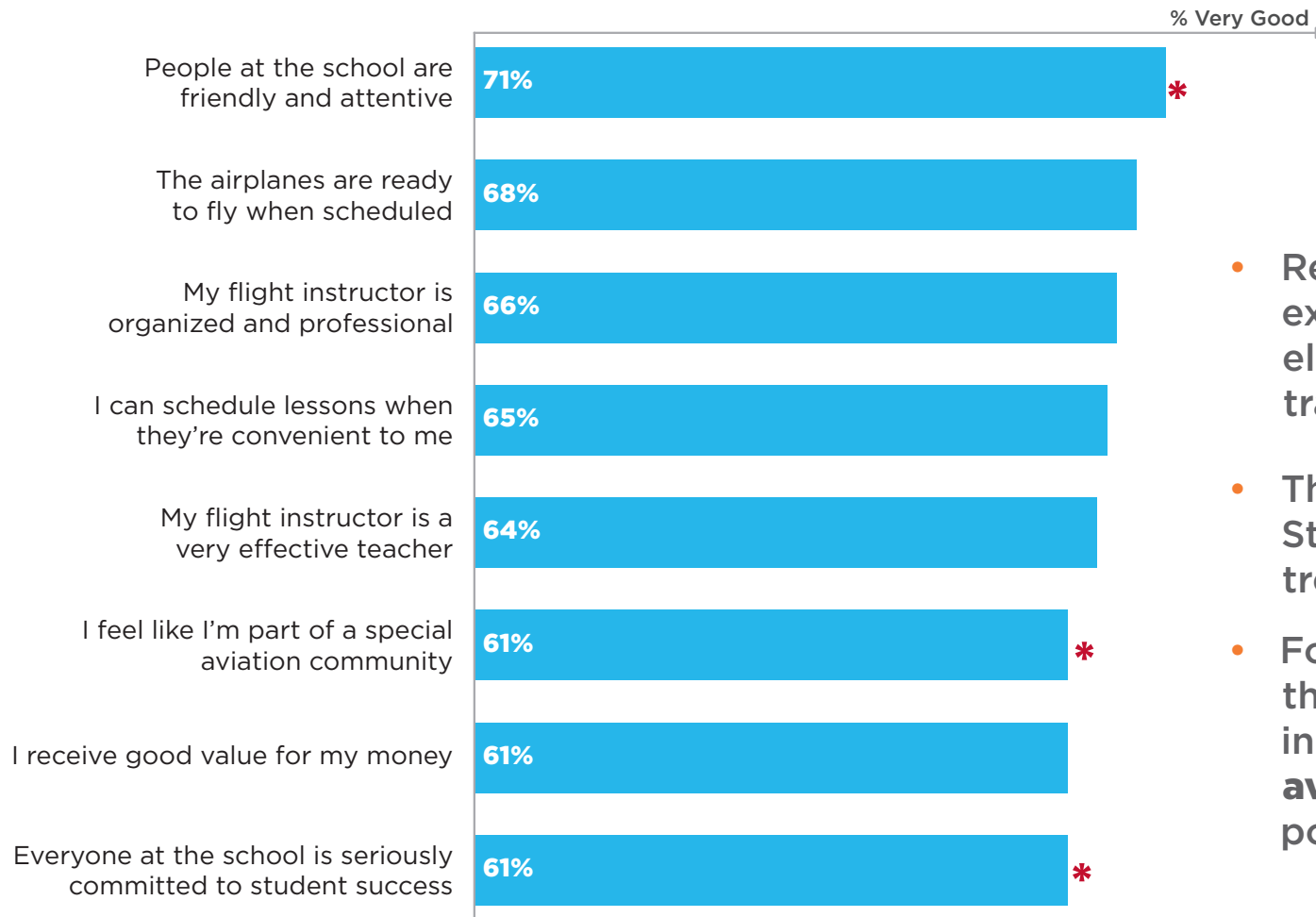
- Clearly, the unique experience of learning to fly is inherently rewarding to all audiences
- Nearly 70 percent report a “very good” experience
- Even lapsed students report a favorable experience
- Notwithstanding the litany of complaints heard in the focus groups, **the overall experience of flight training carries significant value and can mitigate quality issues**

Q3. And generally speaking, would you characterize the experience you had in primary flight training as very good, somewhat good, somewhat bad, or very bad?

Percentages are rounded to the nearest whole number. As a result, some groups may total more or less than 100%.

Most Favorable Training Elements

Characteristics of Primary Flight Training

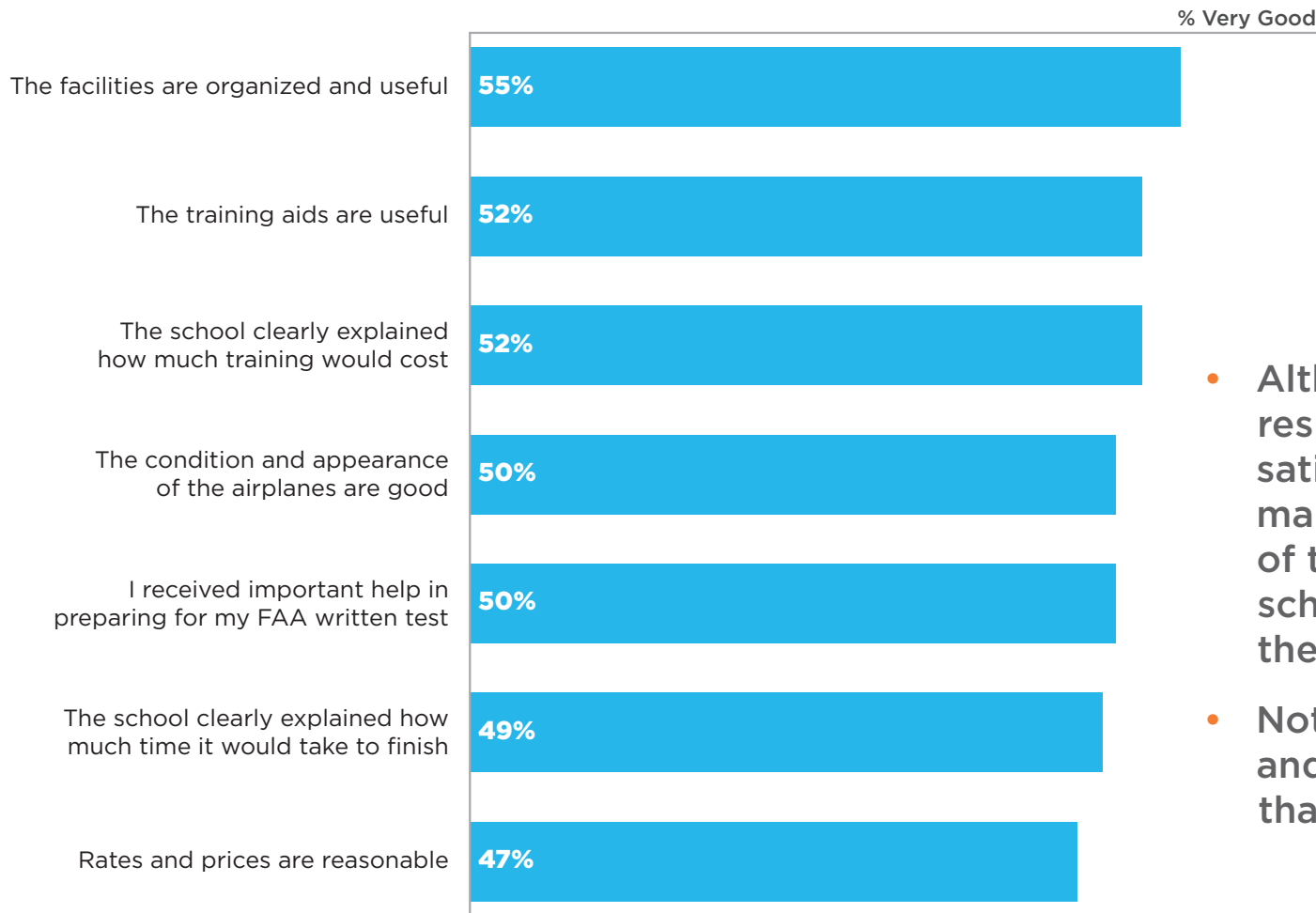


- Respondents report positive experiences for most elements of their flight training experience
- The personal things* matter: Students report being treated well by flight schools
- Focus groups suggested that exclusivity and inclusion in an **achievement-oriented aviation community** are powerful themes

Q4. Here are some characteristics of primary flight training that you will probably remember. As I describe each one, please tell me if your experience was or has been very good, somewhat good, somewhat bad, or very bad.

Least Favorable Training Elements

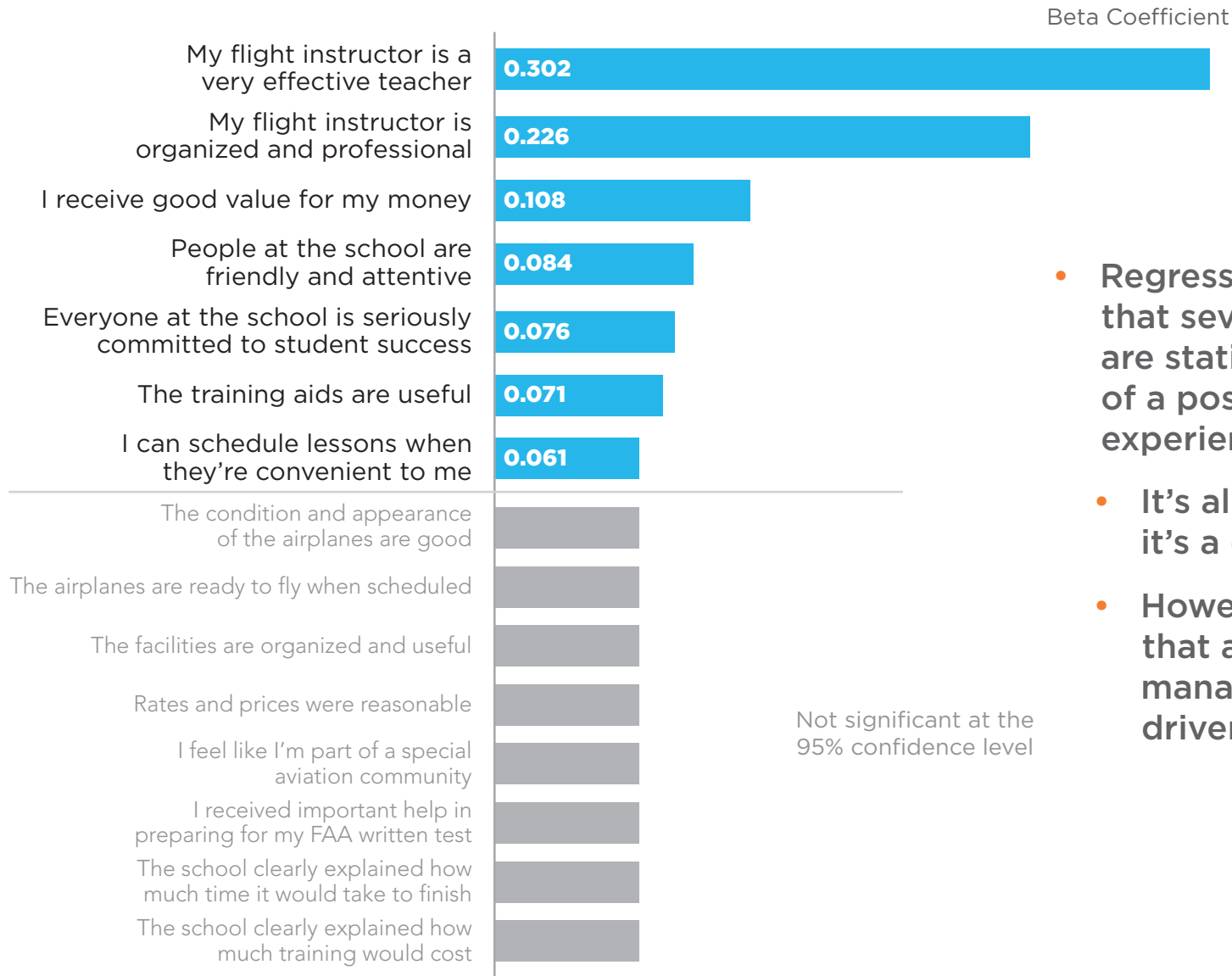
Characteristics of Primary Flight Training



- Although still favorable, respondents report lower satisfaction with more management-type elements of the experience: What the school is like and how clearly they are explaining things
- Not surprisingly, information and cost issues drop into less than 50 percent “very good”

Q4. Here are some characteristics of primary flight training that you will probably remember. As I describe each one, please tell me if your experience was or has been very good, somewhat good, somewhat bad, or very bad.

Drivers of Positive Experience

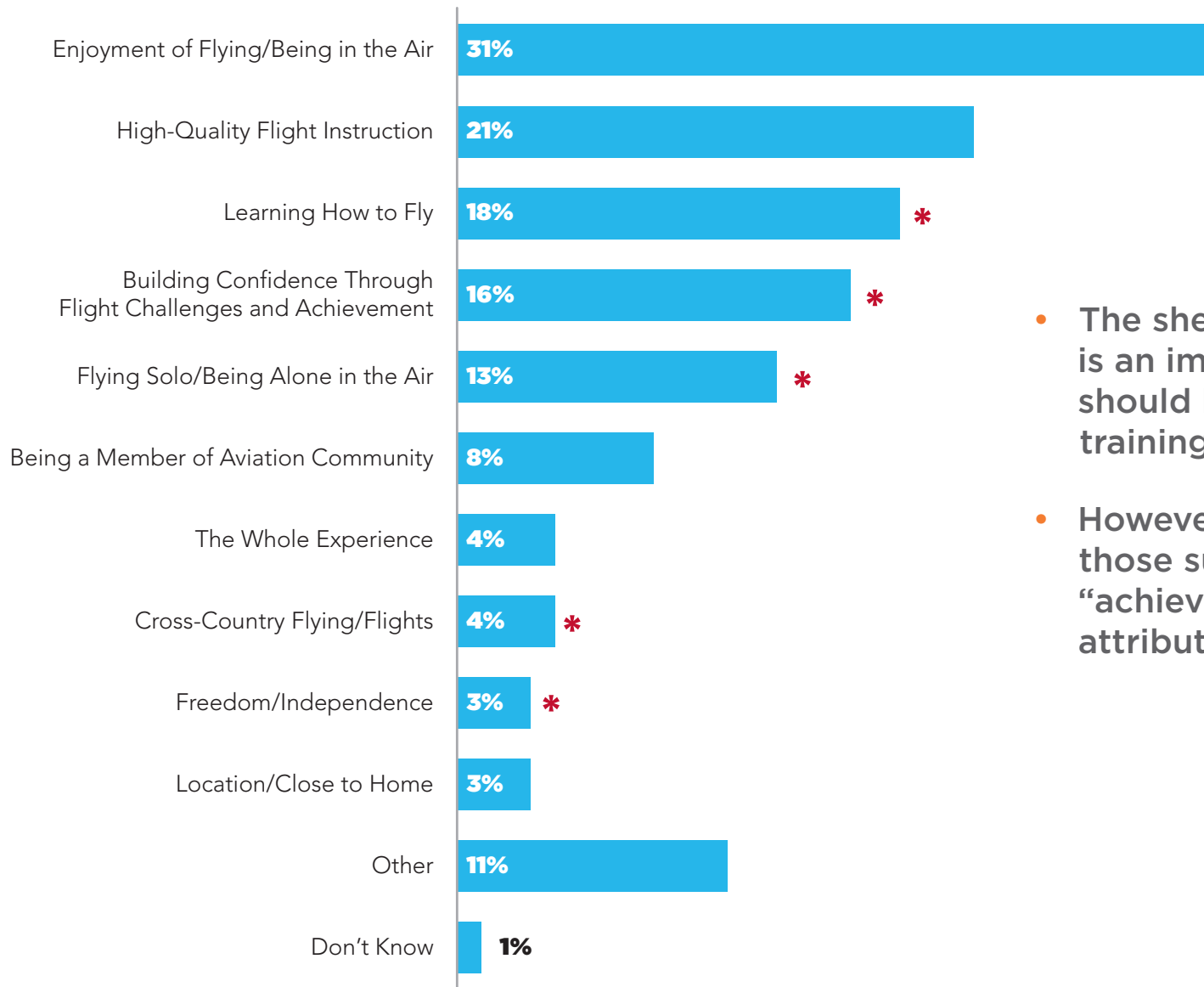


- Regression analysis indicates that seven specific elements are statistically predictive of a positive flight training experience
- It's all about the instructor—it's a decisive relationship
- However, several elements that are functions of school management also are key drivers of the experience

Dependent variable: Q3 (Flight School Favorability) / Independent variable: Q4 series (Flight School Characteristics) $R^2 = .507$

Positive Aspects in Their Words

Positive Aspects



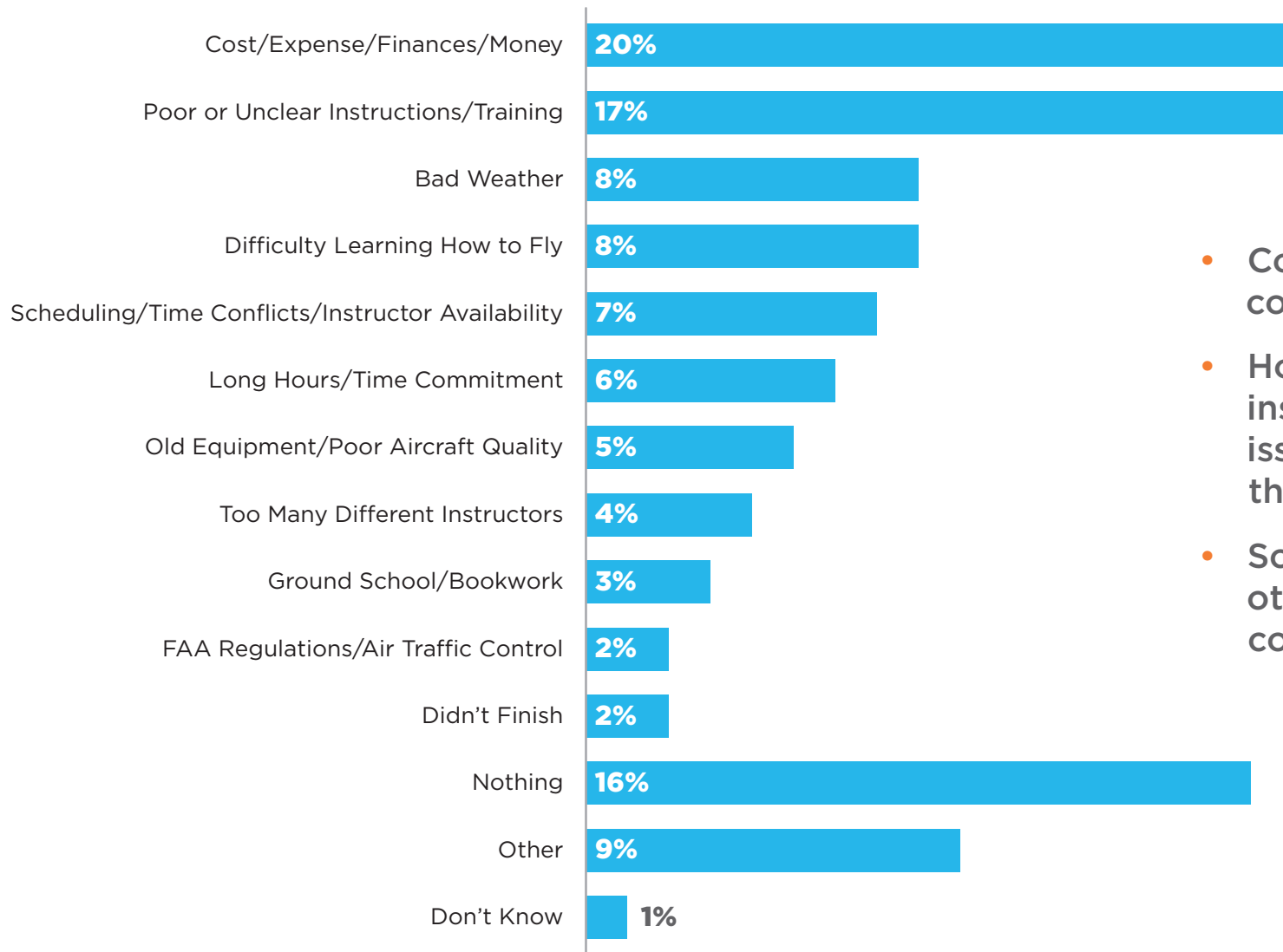
- The sheer enjoyment of flying is an important attribute that should be emphasized in flight training
- However, over half* of those surveyed cited an “achievement-oriented” attribute most favorably

Q5. Thinking about your flight training experience, what was the best aspect of it?

Open-ended question: Chart reflects multiple, verbatim responses therefore aggregate total will be more than 100%.

Negative Aspects in Their Words

Negative Aspects



- Costs are a dominant concern
- However, the quality of instruction is a persistent issue and a weak link in the chain
- Scheduling issues and other delays also were common concerns

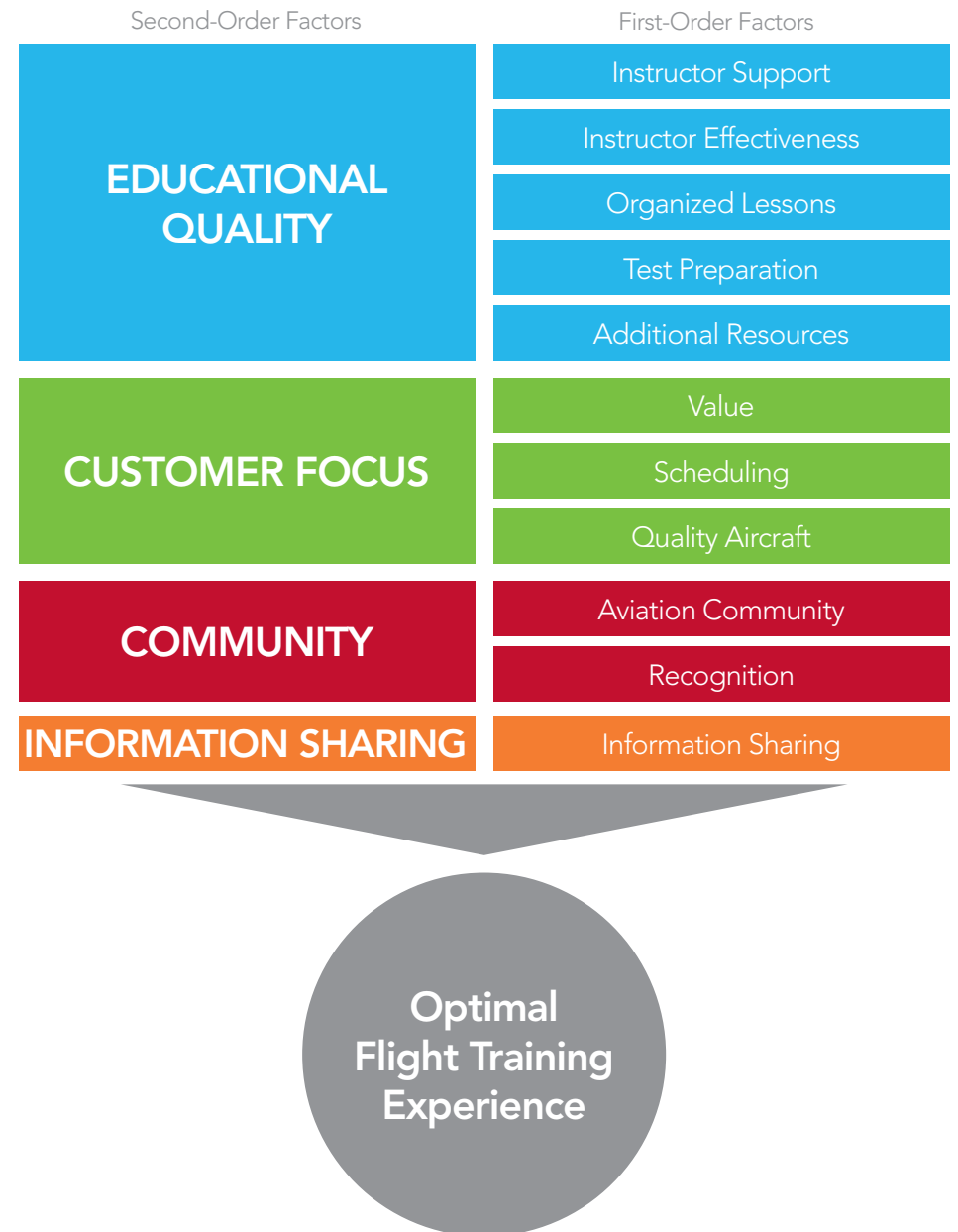
Q6. And what was the most negative aspect of your flight training experience?
Open-ended question: Chart reflects multiple, verbatim responses therefore aggregate total will be more than 100%.



The Flight Training Model

Flight Training Model Factors

- The qualitative research identified 67 discrete attributes that described the optimal flight training experience
- In the quantitative survey, respondents rated the quality of their flight training experience along all 67 attributes on a 10-point scale
- Statistical analysis identified 47 attributes that are decisive—correlating into 11 discrete first-order factors (20 attributes fell from the model)
- Correlations between factor groups defined four broader themes (second-order factors)



Flight Training Model Attributes

EDUCATIONAL QUALITY

Instructor Support

- Flight instructors maintain a professional demeanor
- Offers good compensation and benefits to instructors to encourage good performance
- Has more-experienced instructors occasionally ride along to review your instructor's teaching methods
- Flight instructors have effective teaching skills
- Follows a well-organized syllabus that clearly describes each lesson
- Has well-qualified and experienced instructors
- Flight instructors are available between lessons to discuss flight training
- Flight instructors demonstrate commitment to safety
- Establishes personalized lesson plans based on the student's learning style
- Carefully interviews each student to help select the right instructor
- Flight instructors ensure students understand (and are prepared for) each lesson

Instructor Effectiveness

- Flight instructors spend extra time with students to answer questions
- Flight instructors demonstrate a commitment to student success at each stage of training
- Flight instructors review lessons with student before and after each flight
- Plans each lesson carefully to make efficient use of time and save money
- Seeks input from students about the quality of their training experience

Organized Lessons

- Varies flight routes and destination airports during lessons
- Ensures that lessons are organized and that the student isn't rushed

Test Preparation

- Invites designated FAA examiners to meet with students throughout the training process to get acquainted
- Prepares students to meet all Practical Test Standards for their checkride

Additional Resources

- Provides doctor lists and guidance to help student obtain a medical certificate
- Directs students to online flight planners and other useful websites

CUSTOMER FOCUS

Value

- Offers good value and competitive pricing
- Offers discounts to encourage new pilots to seek advanced ratings
- Avoids covering material in flight that could be covered less expensively on the ground
- Provides practice written tests at no cost
- Guides students to free online learning resources
- Allows students to sit in the back for free during other flight lessons to expand their learning
- Creates opportunities for low-cost group ground school sessions
- Offers flight simulator time to students at low cost

Scheduling

- Keeps scheduling commitments made to the student
- Offers flexible scheduling to accommodate student's schedule
- Schedules in advance to ease student's planning

Quality Aircraft

- Offers new pilots opportunities to fly more advanced aircraft
- Offers aircraft with modern equipment
- Keeps aircraft well maintained so they are available when needed

COMMUNITY

Aviation Community

- Makes students feel welcome in the aviation community
- Creates an atmosphere that makes students feel part of something special
- Hosts events and parties for students and new pilots
- Has common area to socialize and learn from other pilots

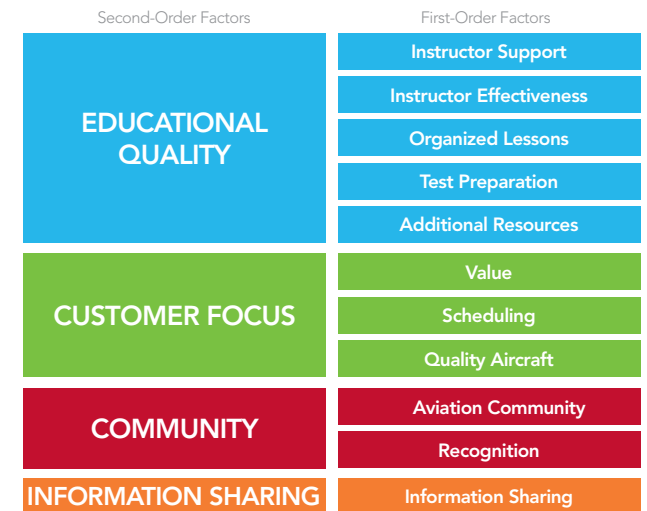
Recognition

- Announces student milestones—like first solo flights—in newsletters and on school website
- Provides certificates for student achievements during the training process
- Hosts open houses and events recognizing student milestones

INFORMATION SHARING

Information Sharing

- Provides statistics on student success rates at the school
- Discloses the qualifications and experience level of all instructors
- Shares student success stories and offers references from other students
- Provides realistic estimate of time and costs required for a pilot certificate



Optimal
Flight Training
Experience



Factor Descriptions

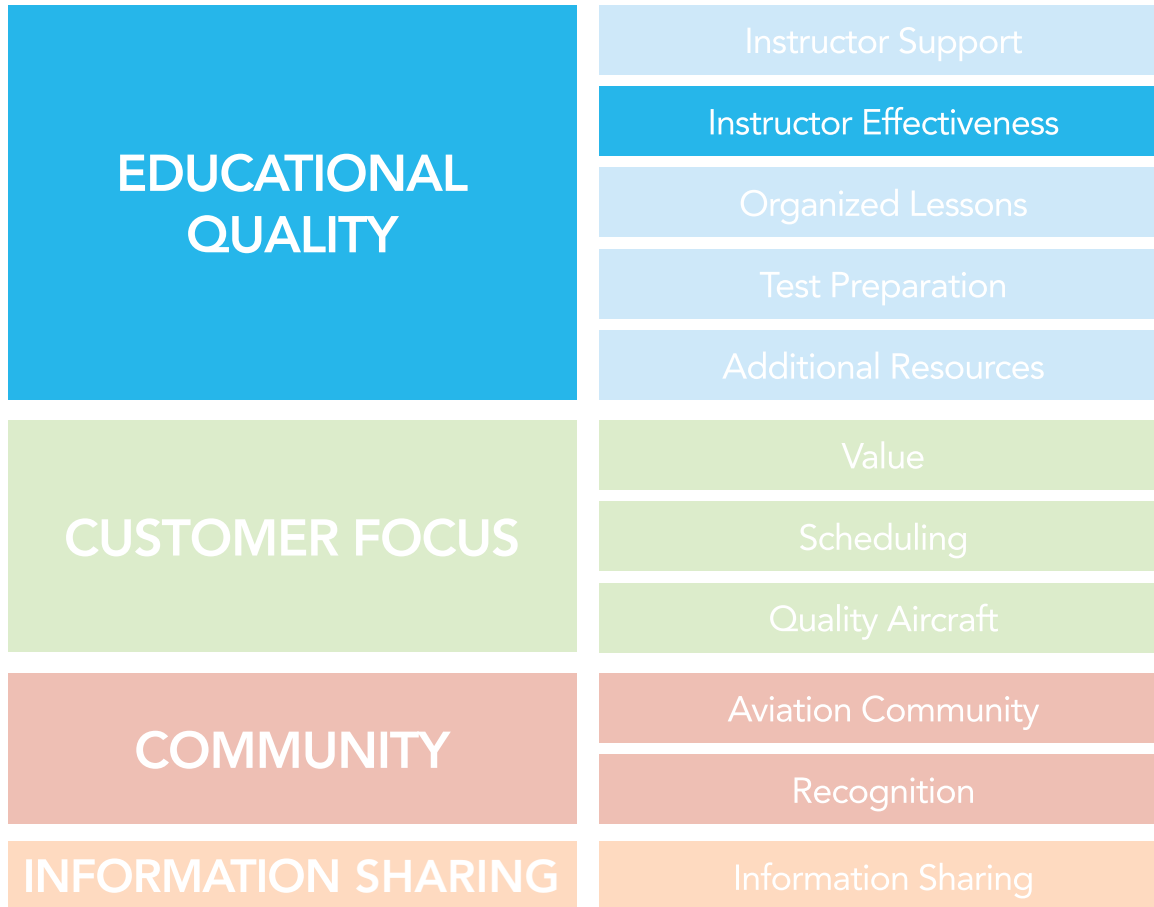
Instructor Support

EDUCATIONAL QUALITY	Instructor Support
	Instructor Effectiveness
	Organized Lessons
	Test Preparation
	Additional Resources
CUSTOMER FOCUS	Value
	Scheduling
	Quality Aircraft
COMMUNITY	Aviation Community
	Recognition
INFORMATION SHARING	Information Sharing

This factor is about the flight school, not the instructor.

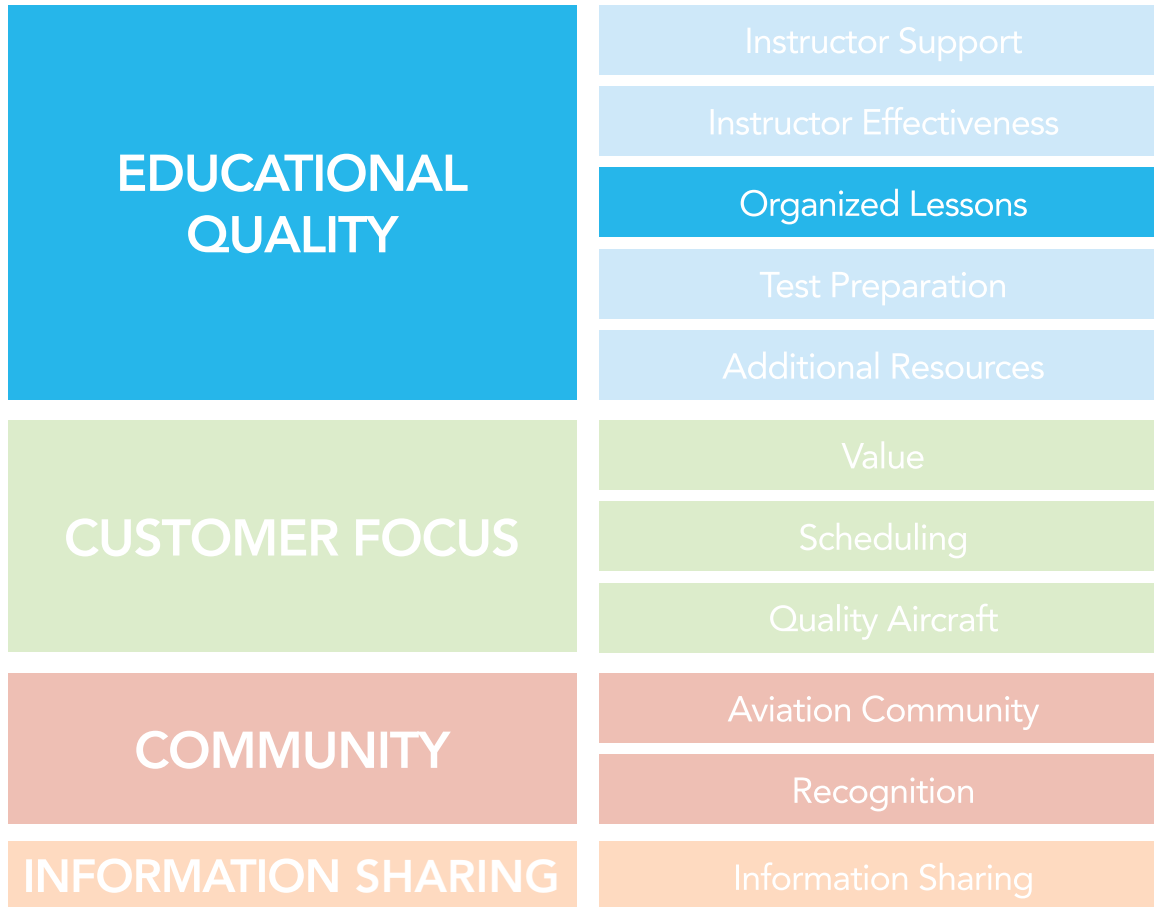
Schools must support and train their instructors, arrange a good student-instructor match, measure success, and ensure standards of professionalism are met.

Instructor Effectiveness



It's all about how the flight instructors interact with their students, including pre- and post-flight briefings, and demonstrate their commitment to student success.

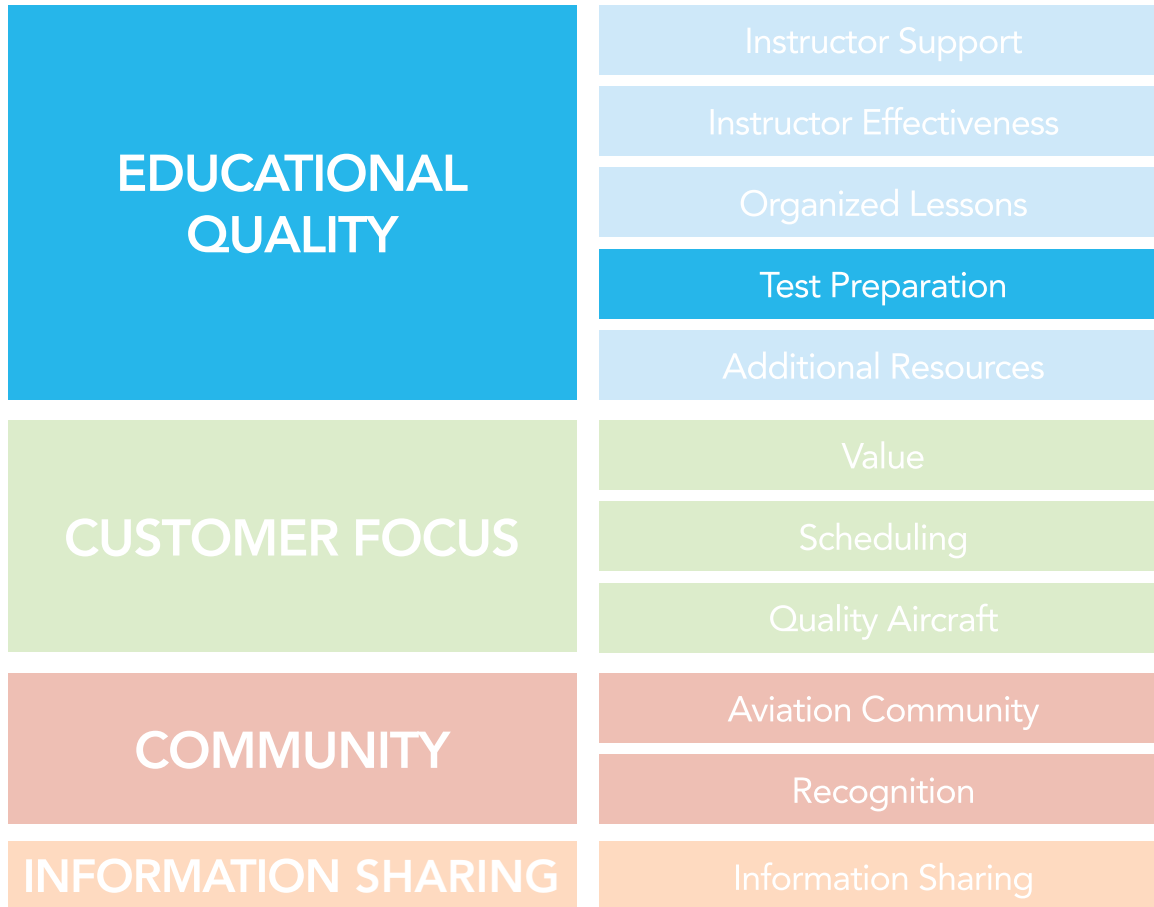
Organized Lessons



This factor describes how each lesson is organized to enhance student learning.

Organized lessons keep training interesting, efficient, and don't rush the student.

Test Preparation



Most students loathe both the written test and their checkride.

This factor describes how schools ease the process for checkrides by carefully preparing students.

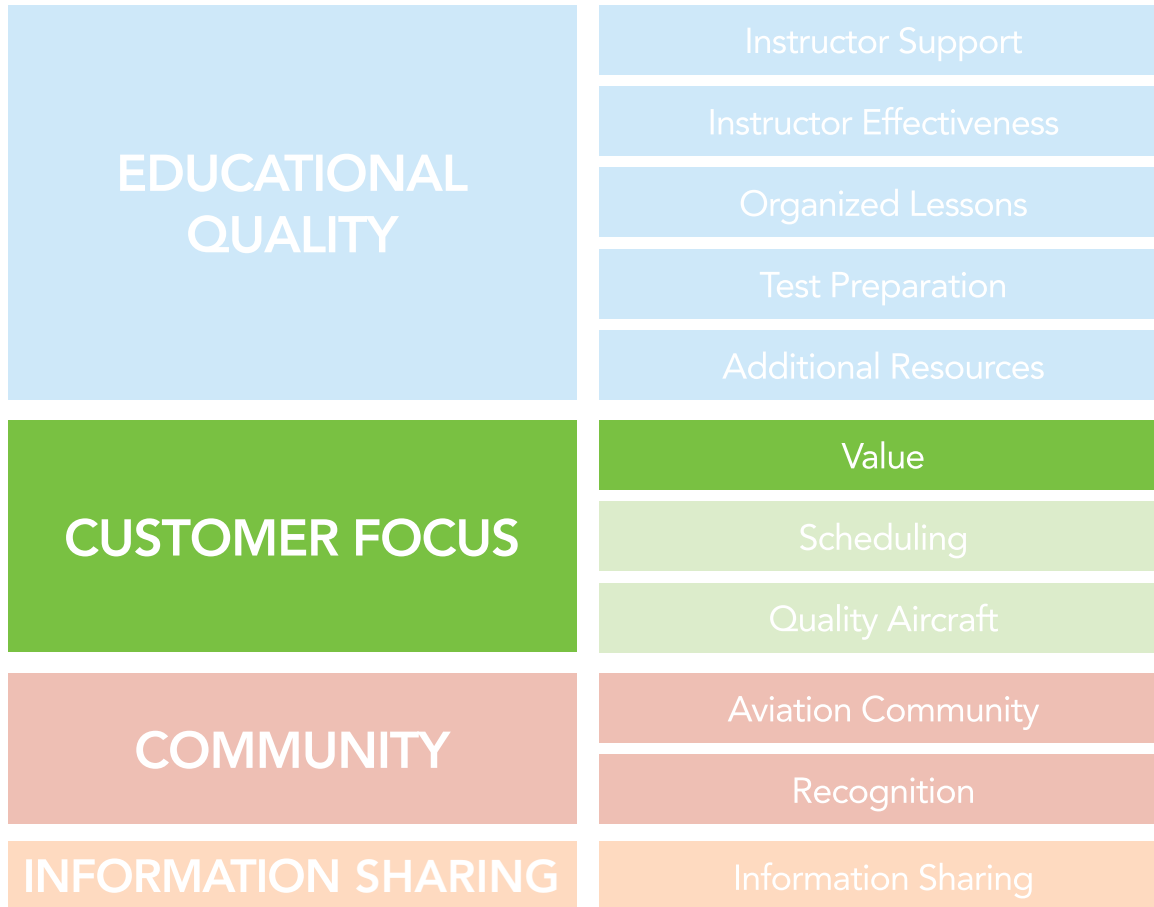
Additional Resources

EDUCATIONAL QUALITY	Instructor Support
	Instructor Effectiveness
	Organized Lessons
	Test Preparation
	Additional Resources
CUSTOMER FOCUS	Value
	Scheduling
	Quality Aircraft
COMMUNITY	Aviation Community
	Recognition
INFORMATION SHARING	Information Sharing

Students aren't plugged into resources that many pilots take for granted.

Directing students to other resources and websites, and helping them obtain their medical certificates is important.

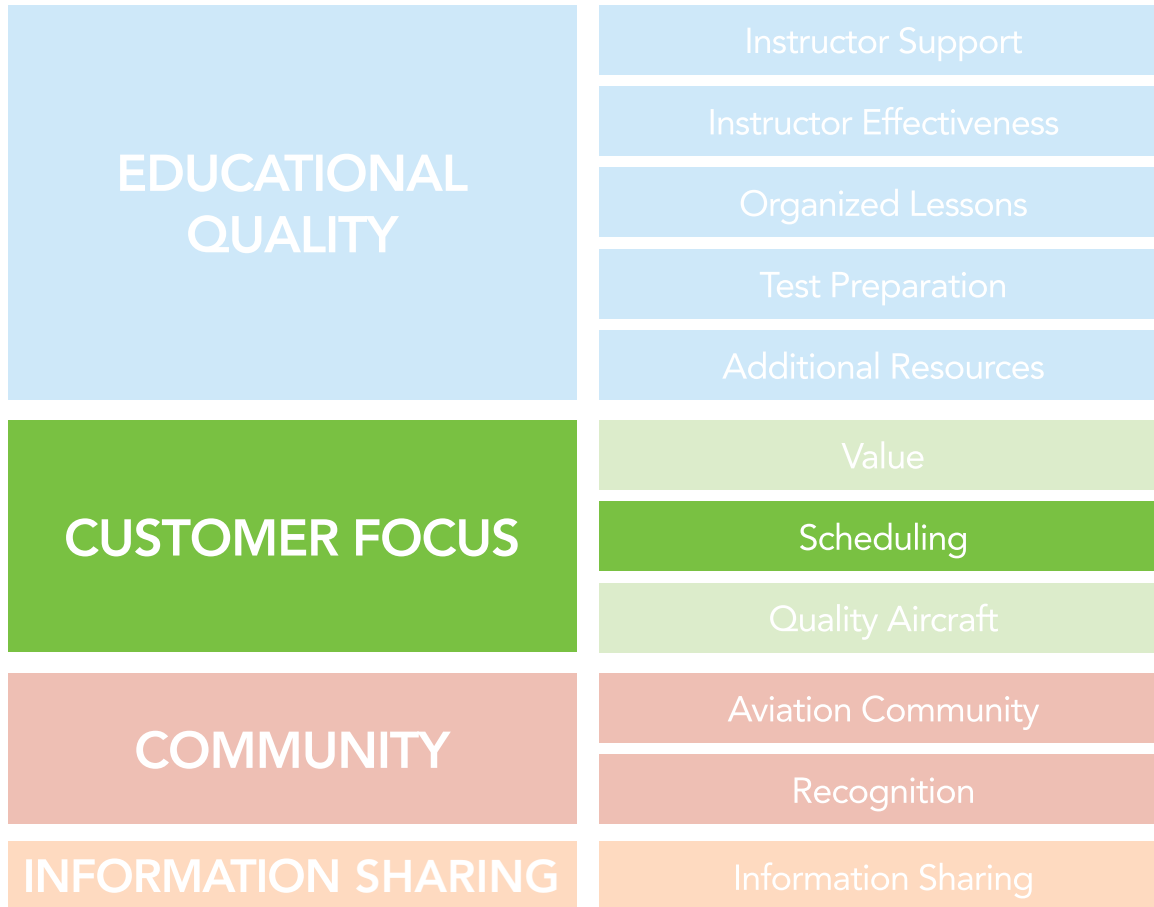
Value



Value means far more than price.

Schools should seek ways to stretch the student's dollar, offer free or low-cost learning opportunities, and demonstrate they're billing the student fairly.

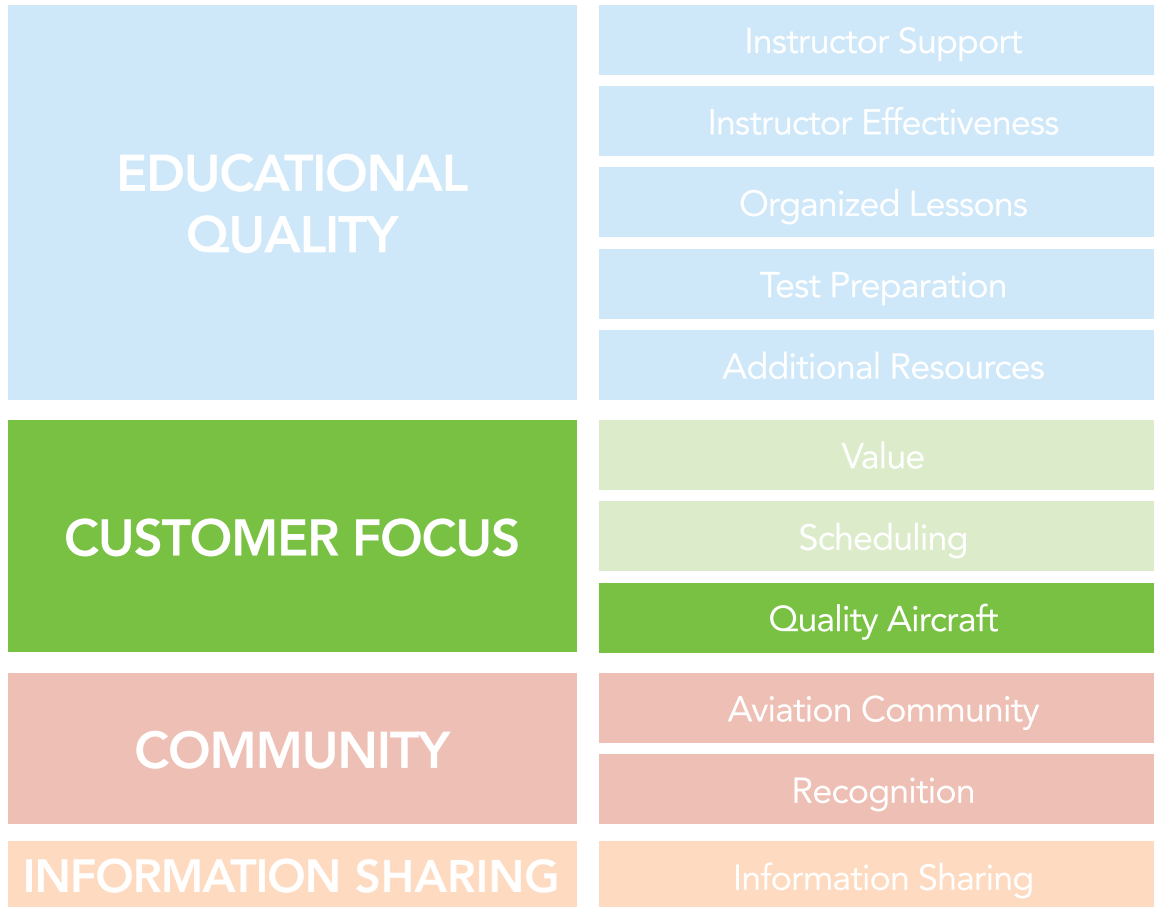
Scheduling



A key value proposition is simplifying the challenge students have in scheduling.

Being flexible and scheduling lessons in advance really helps.

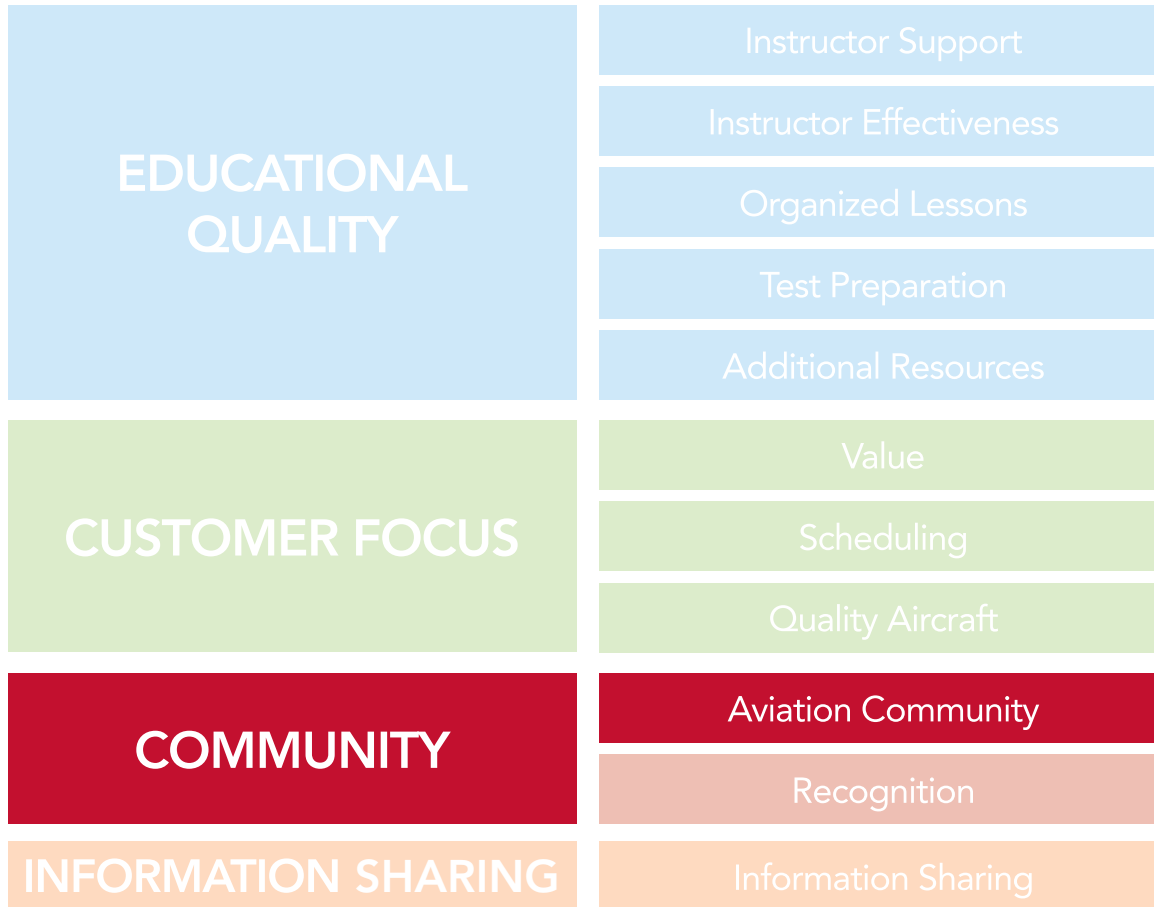
Quality Aircraft



Students expect to train in clean, well-maintained, and reliable aircraft.

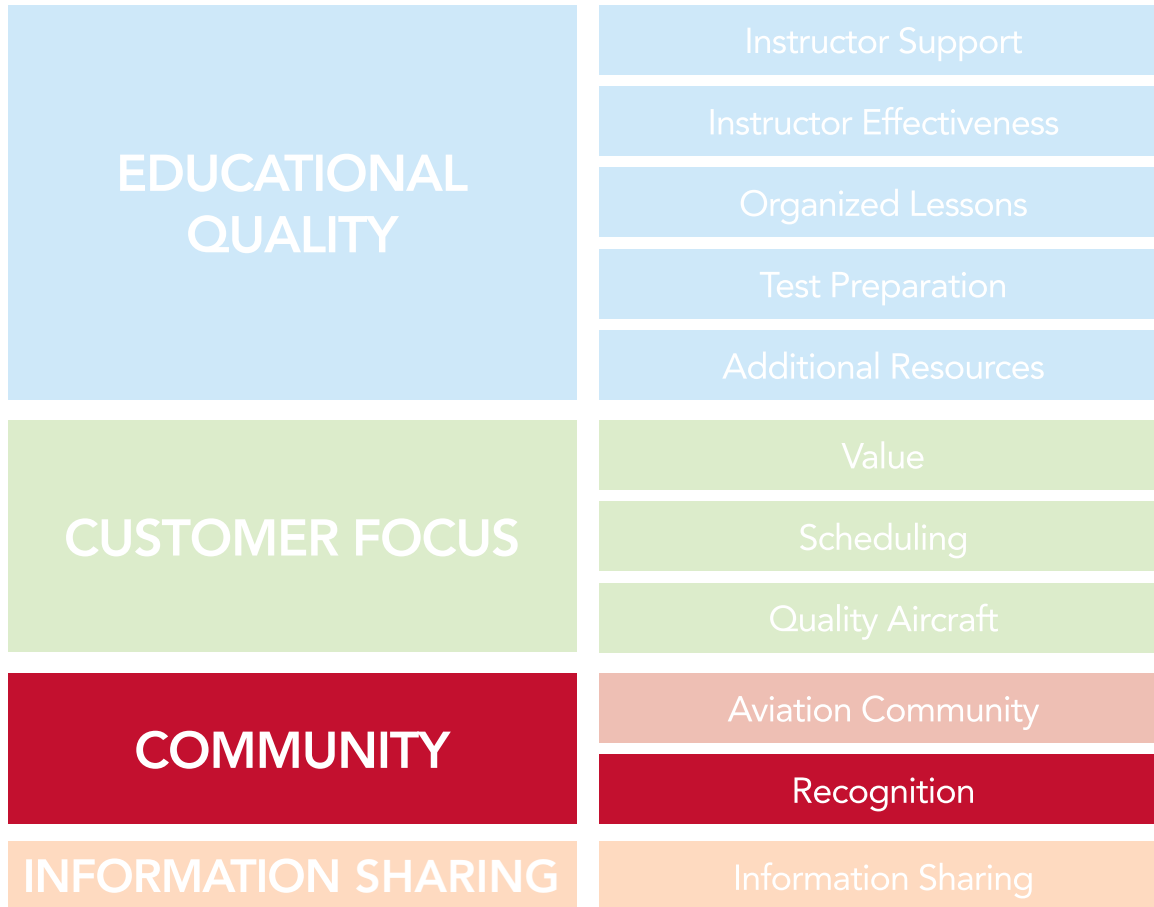
They also want relatively modern, up-to-date equipment.

Aviation Community



There is great pride in being admitted to an aviation “community” that shares a sense of accomplishment.

Recognition



Students attach importance to having their accomplishments recognized by others.

Schools and instructors should facilitate this recognition.

Information Sharing

EDUCATIONAL QUALITY	Instructor Support
	Instructor Effectiveness
	Organized Lessons
	Test Preparation
	Additional Resources
CUSTOMER FOCUS	Value
	Scheduling
	Quality Aircraft
COMMUNITY	Aviation Community
	Recognition
INFORMATION SHARING	Information Sharing

Students are at a knowledge disadvantage and seek real-world estimates of time and expense involved in flight training.

Students expect to see qualifications and the experiences others have had.



Model Output

Output: Measures that Matter

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

Impact Scores

- Measures the extent to which each factor drives the overall experience.
- These scores are presented in percentage terms to indicate the relative strength of each factor.

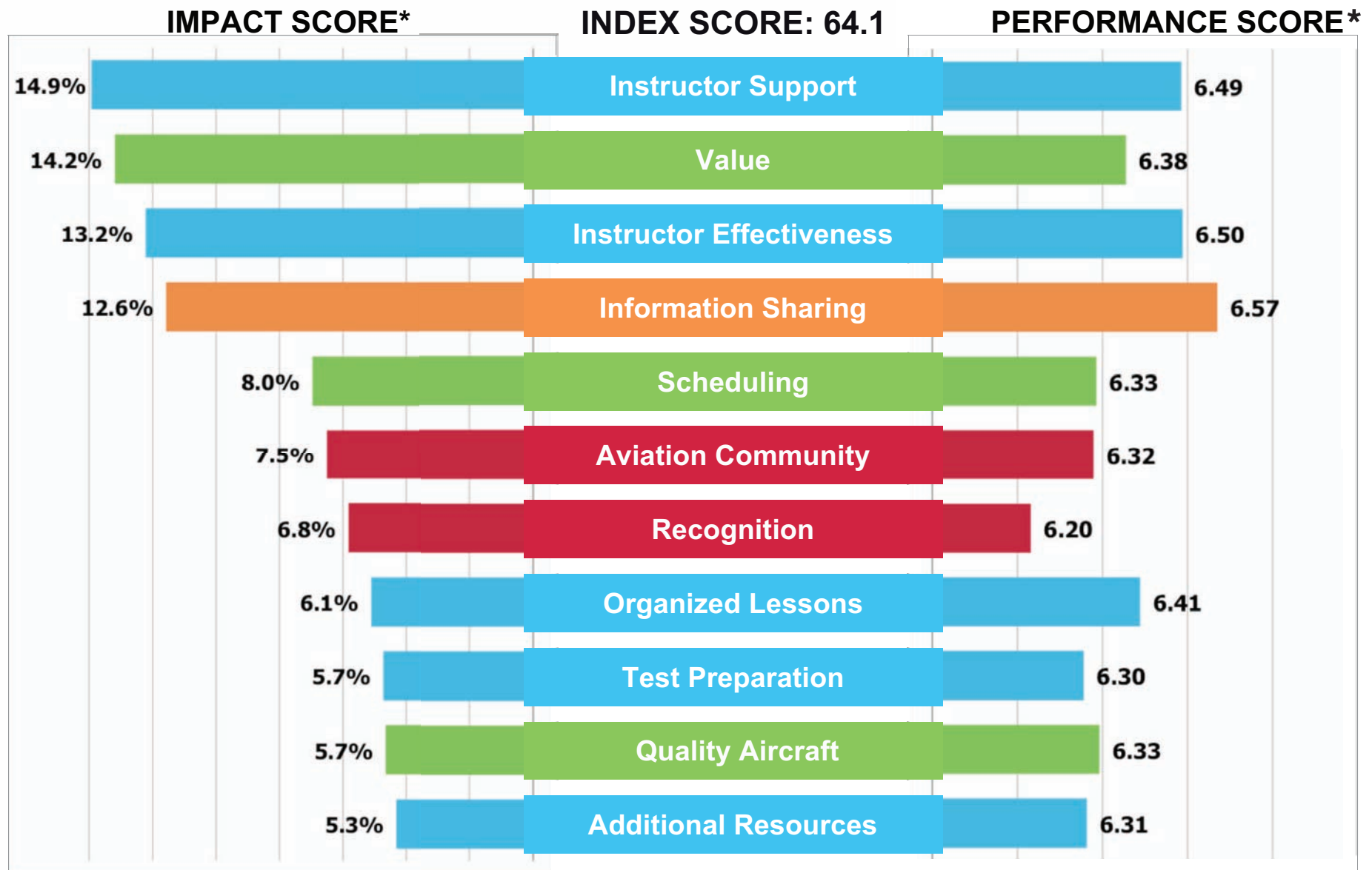
Performance Scores

- Depict how well the flight training experience performs along each of the 11 first-order factors.
- The score is based on a scale from one to 10.

Index

- An overall measure of the flight training experience that can be used for benchmarking purposes.
- The index is a number between 10 and 100 that takes into account the impact and performance scores of all of the factors.

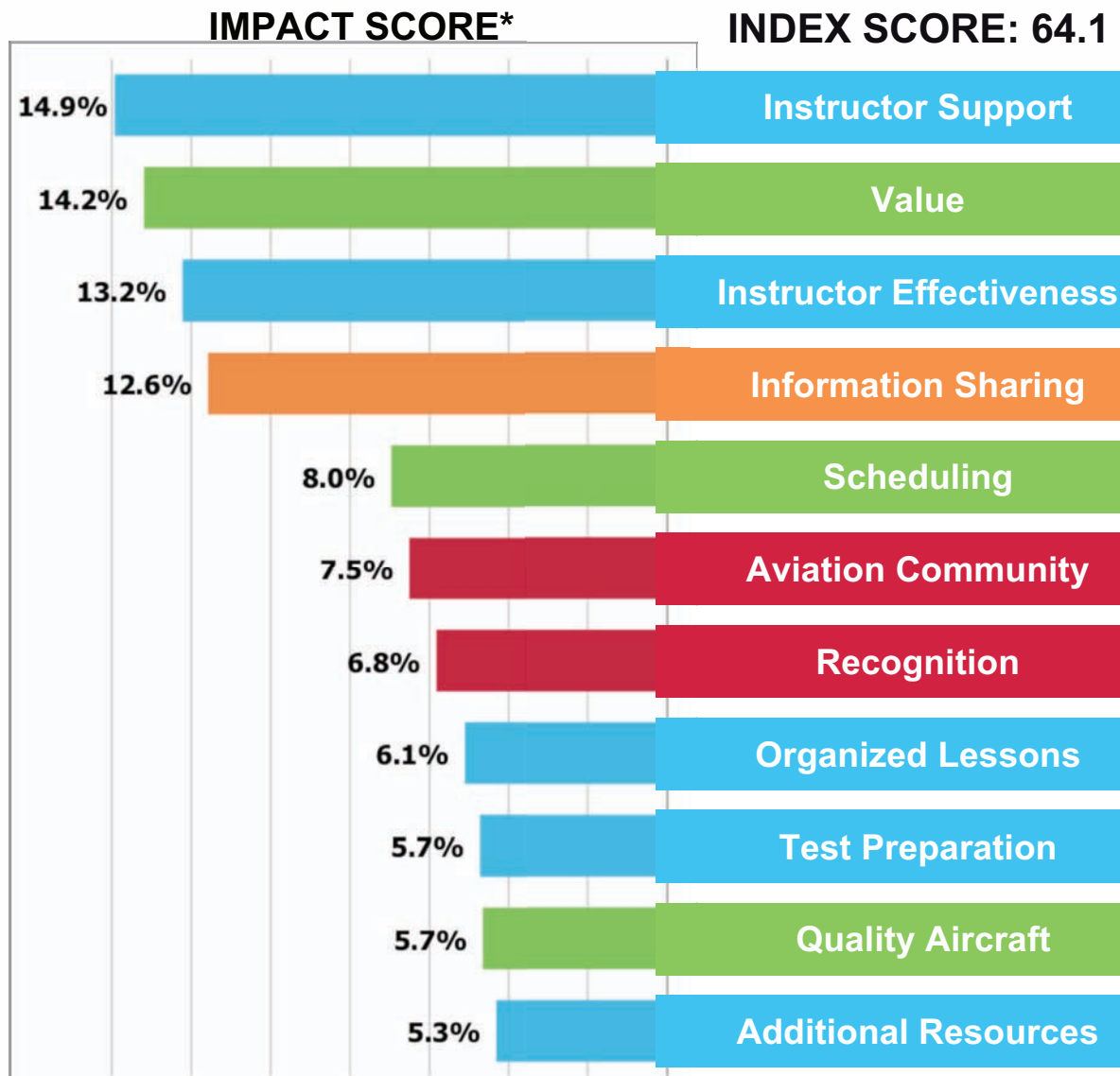
Strengths and Weaknesses



*Relative strength of the factor in driving overall satisfaction

*Performance Score scale lines represent confidence interval of .169

Factor Impact

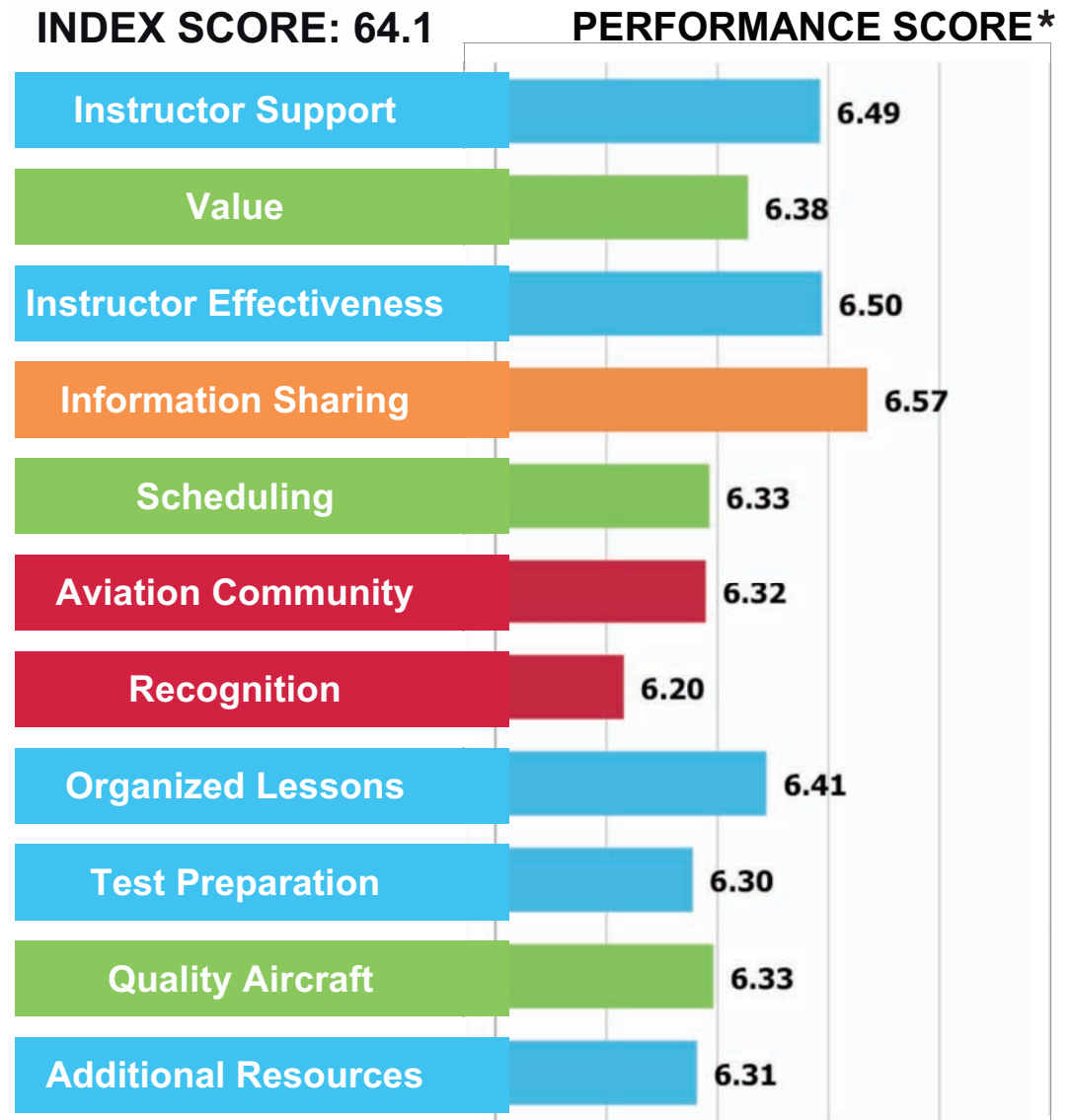


- The most significant driver—“Instructor Support”—relates to how well schools support and manage their instructors.
- “Instructor Effectiveness” also is key: How well do instructors do their job?
- Other expectations on “Value” (helping students save money) and “Information Sharing” (full and realistic disclosure) are high-impact.

*Relative strength of the factor in driving overall satisfaction

Factor Performance

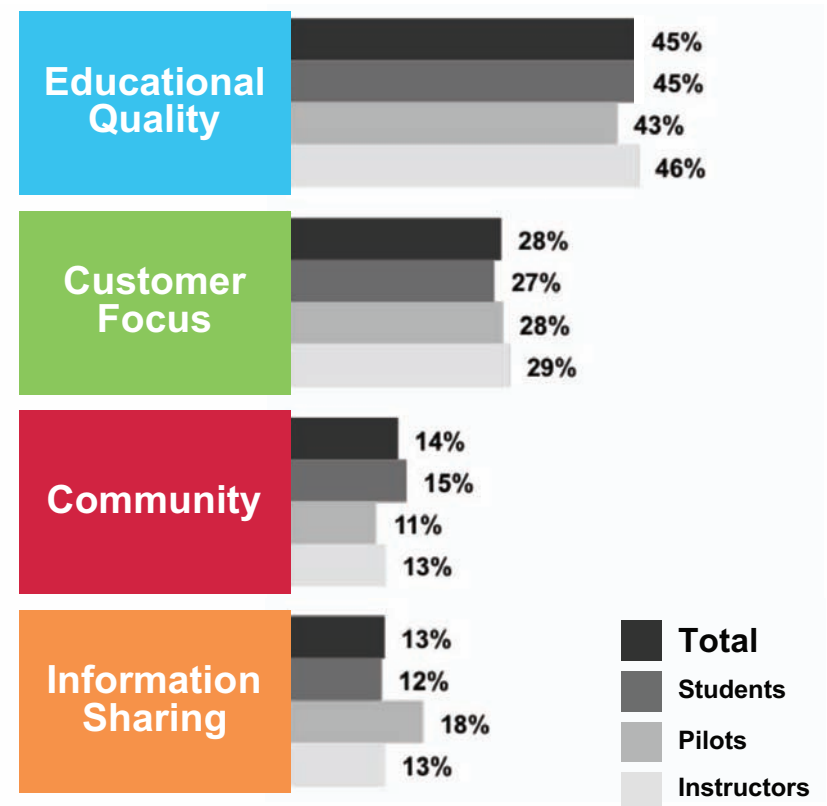
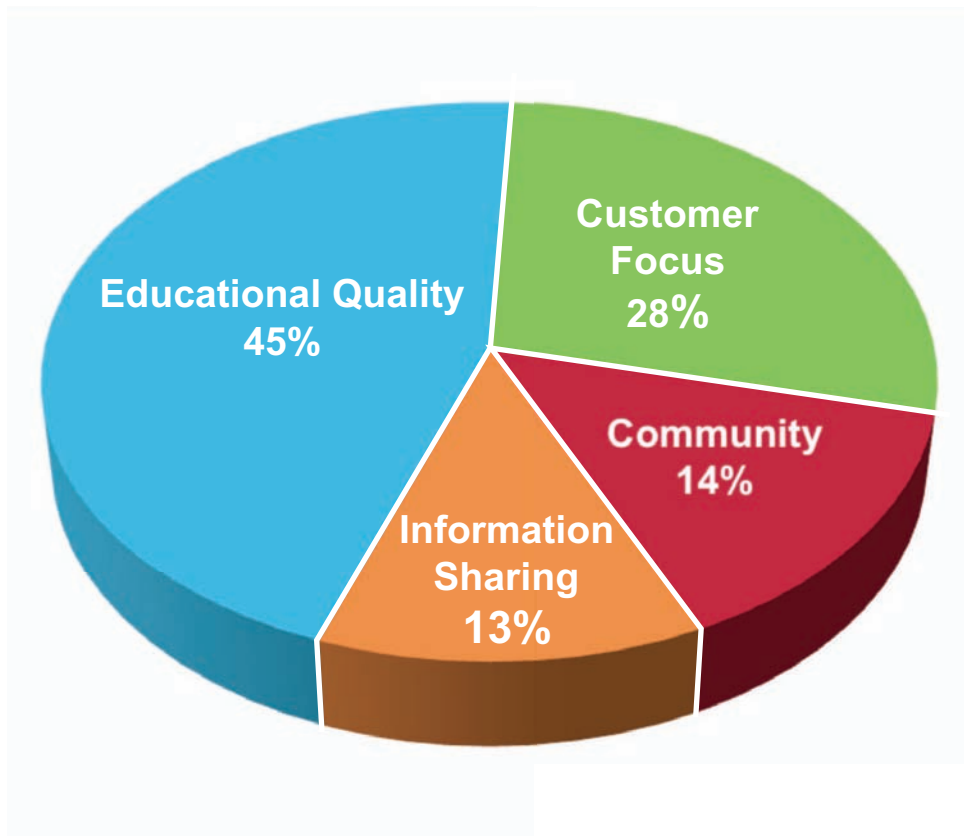
- Performance figures (how well the factor describes their experience) is the highest among the higher impact factors
- This is a good alignment that suggests the industry is playing to its strengths
- However, no performance score goes much beyond the scale midpoint, which indicates a moderately positive alignment with their experiences



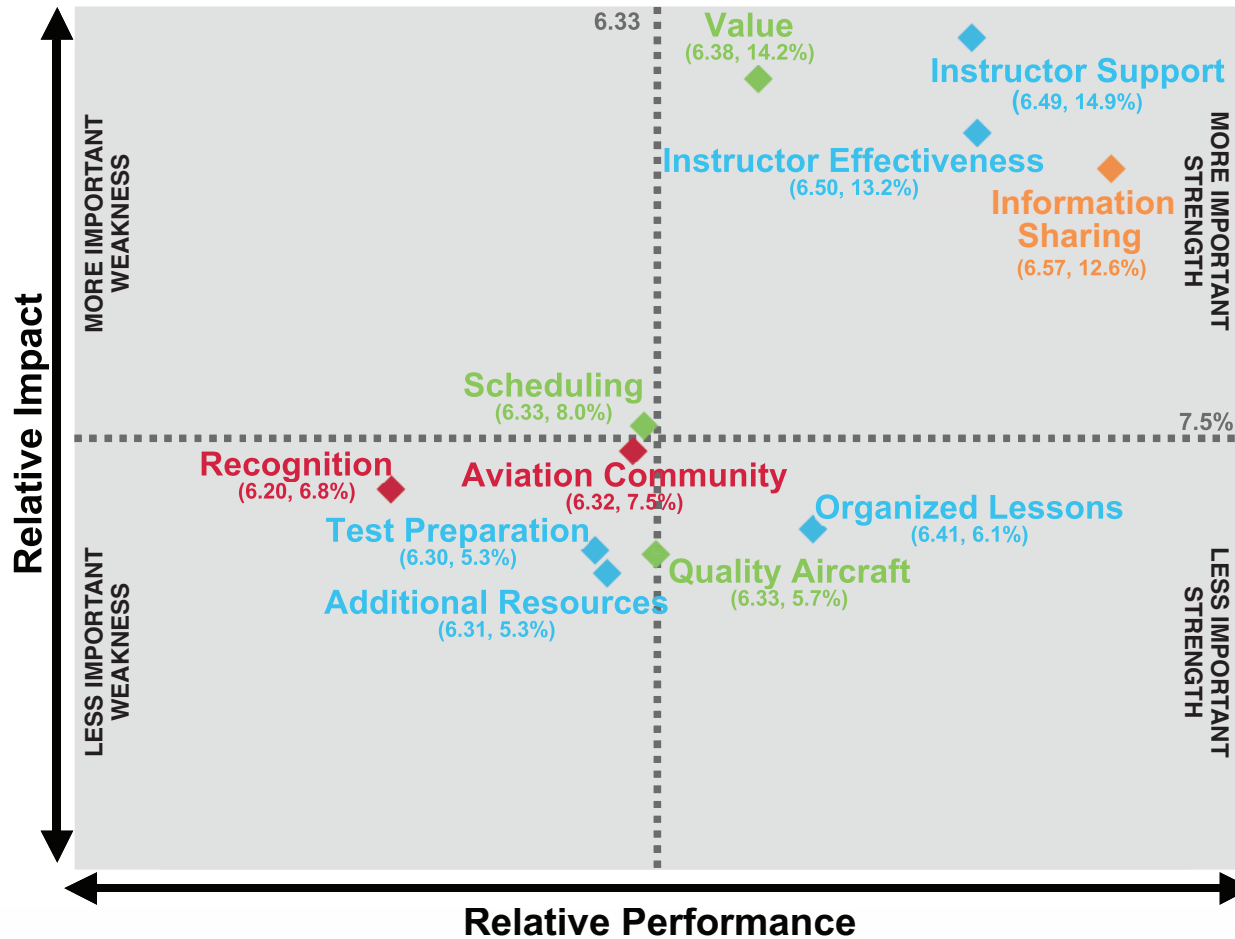
*Performance Score scale lines represent confidence interval of .169

Reputation Drivers

- The factors comprising “Educational Quality” drive nearly half of the overall assessment of flight training.
- In effect, quality eclipses cost/value for most. It’s a challenge to the industry to demonstrate the experience is worth the price.



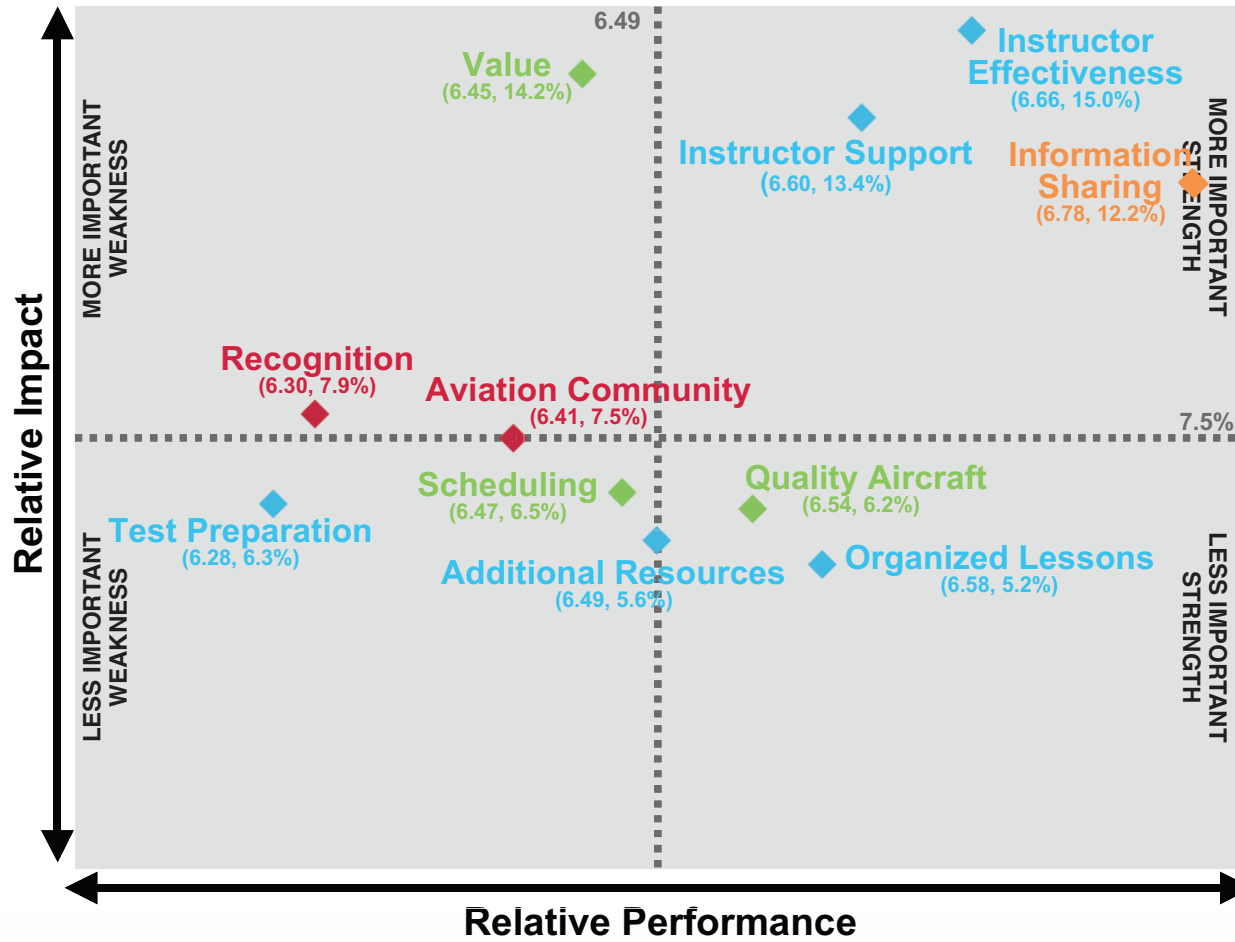
Flight Training Message Matrix



- Play to strengths or mitigate weaknesses?
- The flight training industry is well-aligned (doing the important things well).
- To enhance student commitment, recall the passion: “Recognition” and “Community” are obvious places where initiatives can be undertaken.

Matrix depicts each factor’s performance and impact relative to the other factors.
 Matrix midpoints represent the median performance and impact score.
 Coordinates represent [Performance Score/Impact Score].

Students: Important Weaknesses



- “Value” slips into the “Important Weakness” quadrant for students
- “Community” also is more important for students, even as the industry’s performance is weak
- Core strengths remain “Educational Quality,” and “Information Sharing”

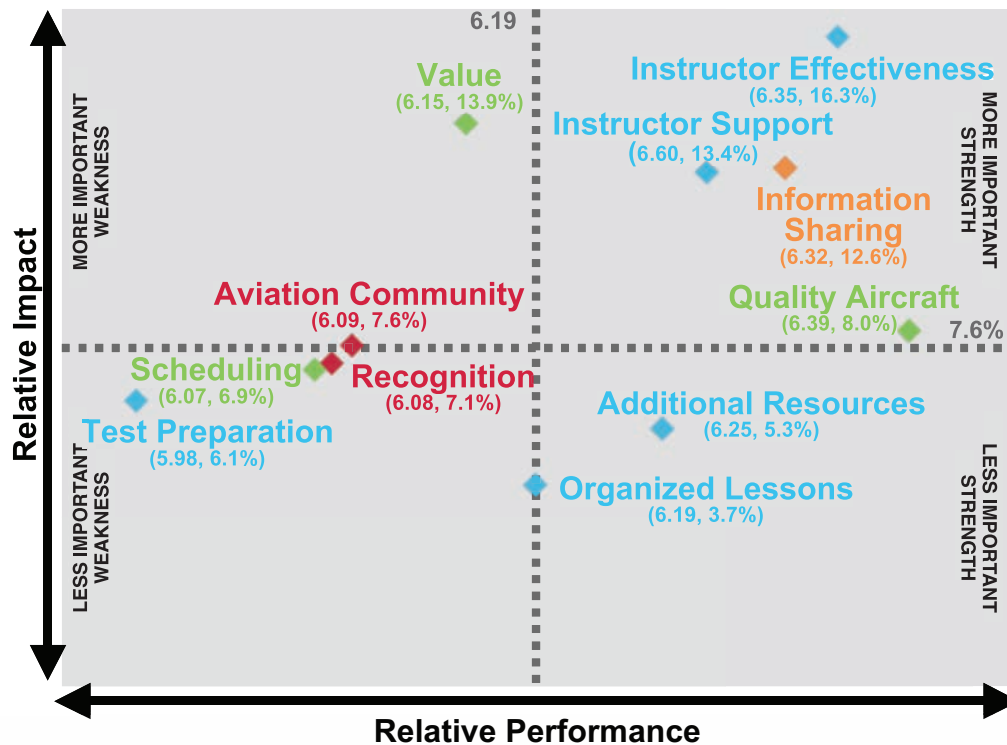
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Lapsed Students vs. Pilots

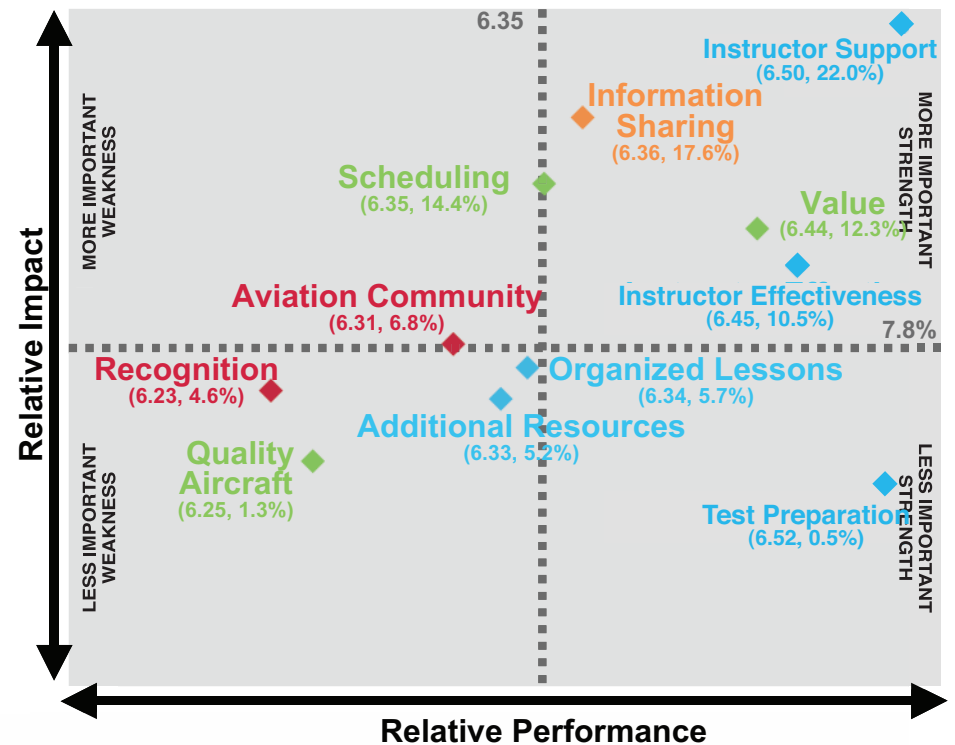
- The most apparent challenge for lapsed students relates to “Customer Focus.” There’s a dramatic difference between lapsed students and successful pilots on the “Value,” “Scheduling,” and “Quality Aircraft” factors.
- Although 92 percent* of lapsed students remember their overall flight training experience favorably, their performance ratings for “Test Preparation,” “Value,” “Scheduling,” and “Aviation Community” were markedly lower than pilots who completed training.

* See “A Strongly Positive Experience” (Page 11)

Lapsed Students



Pilots

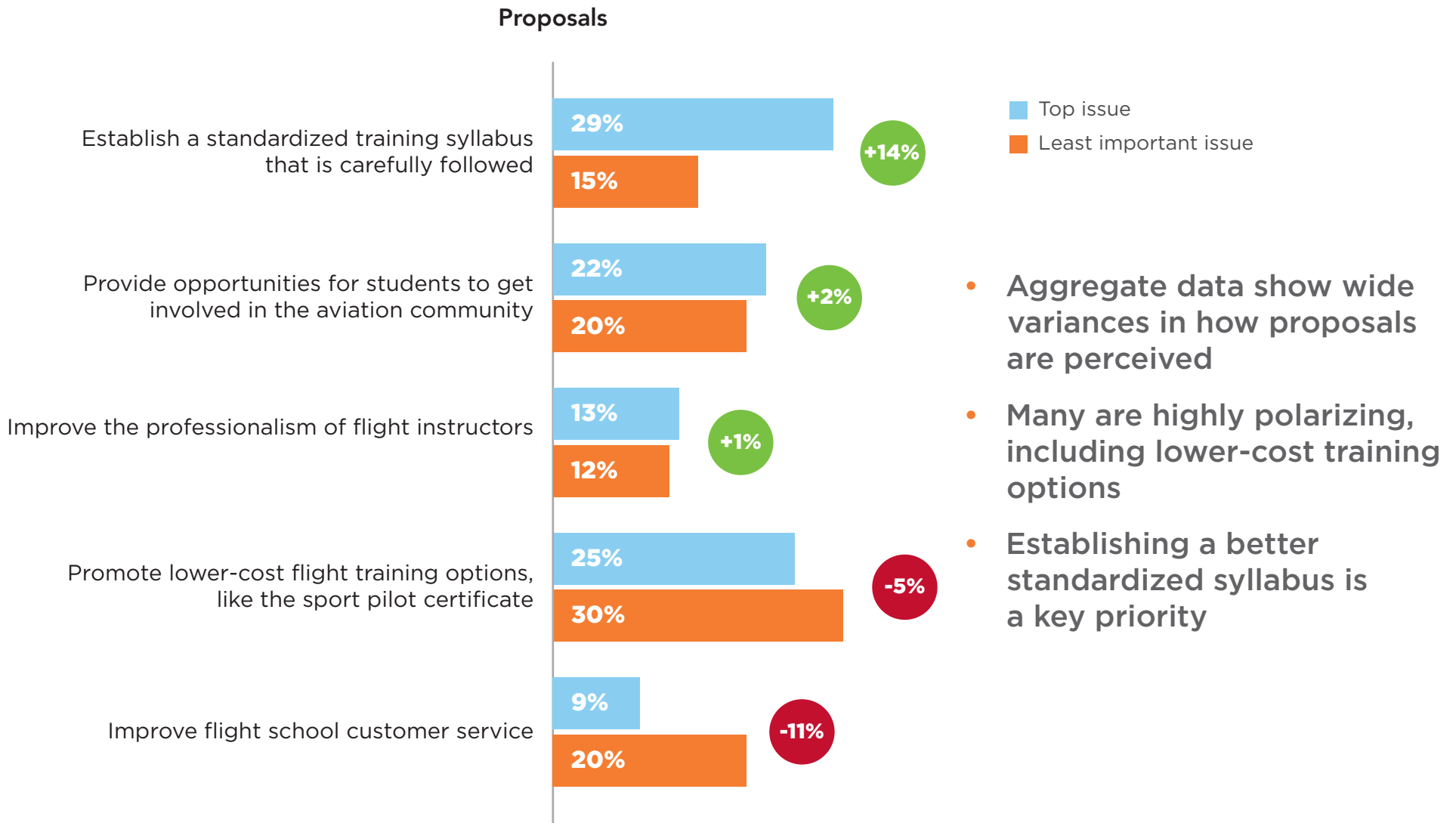


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Issues and Initiatives

Training Reform Proposals



Q10. Here are several issues that pilots have said are priorities for flight training. Please indicate which ONE issue would be your TOP concern — that is, which one issue do you consider to be the most important?

Q11. And still thinking about the same issues, which ONE among them would be the LEAST important? That is, which would be your last priority?

Percentages are rounded to the nearest whole number. As a result, some groups may total more or less than 100%.



Summary

Key Findings

State of Play

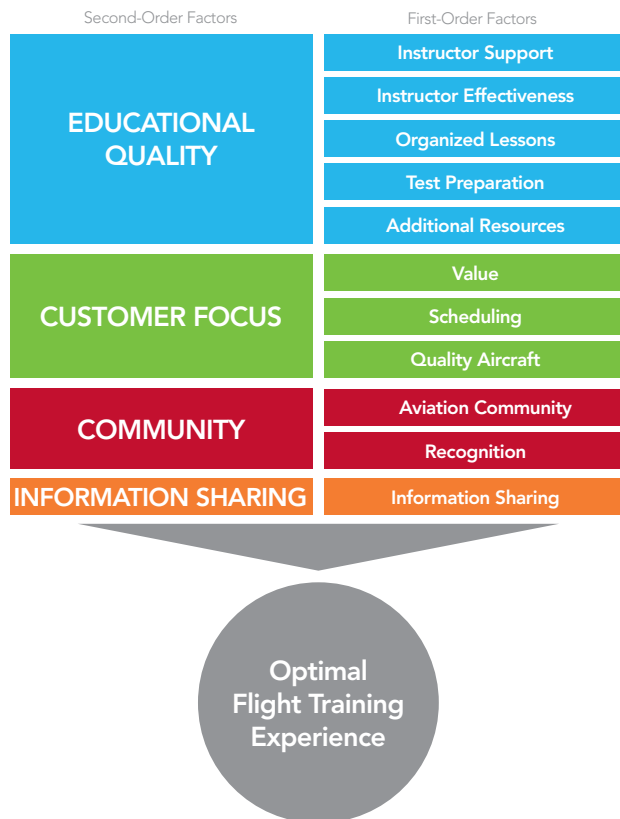
- Recreational goals are the most common reason for learning to fly and most students learn outside the Part 141 environment
- Students come to the process through referrals and place a premium on personal interaction with the aviation community
- The flight instructor's performance is especially important

A Unique Experience

- Flying and the sense of accomplishment it delivers is a powerful influence that mitigates quality issues and results in an overall positive experience
- The notion of an “aviation community” that shares this experience is a key motivator and emerged as a distinct idea in the model

The Flight Training Model

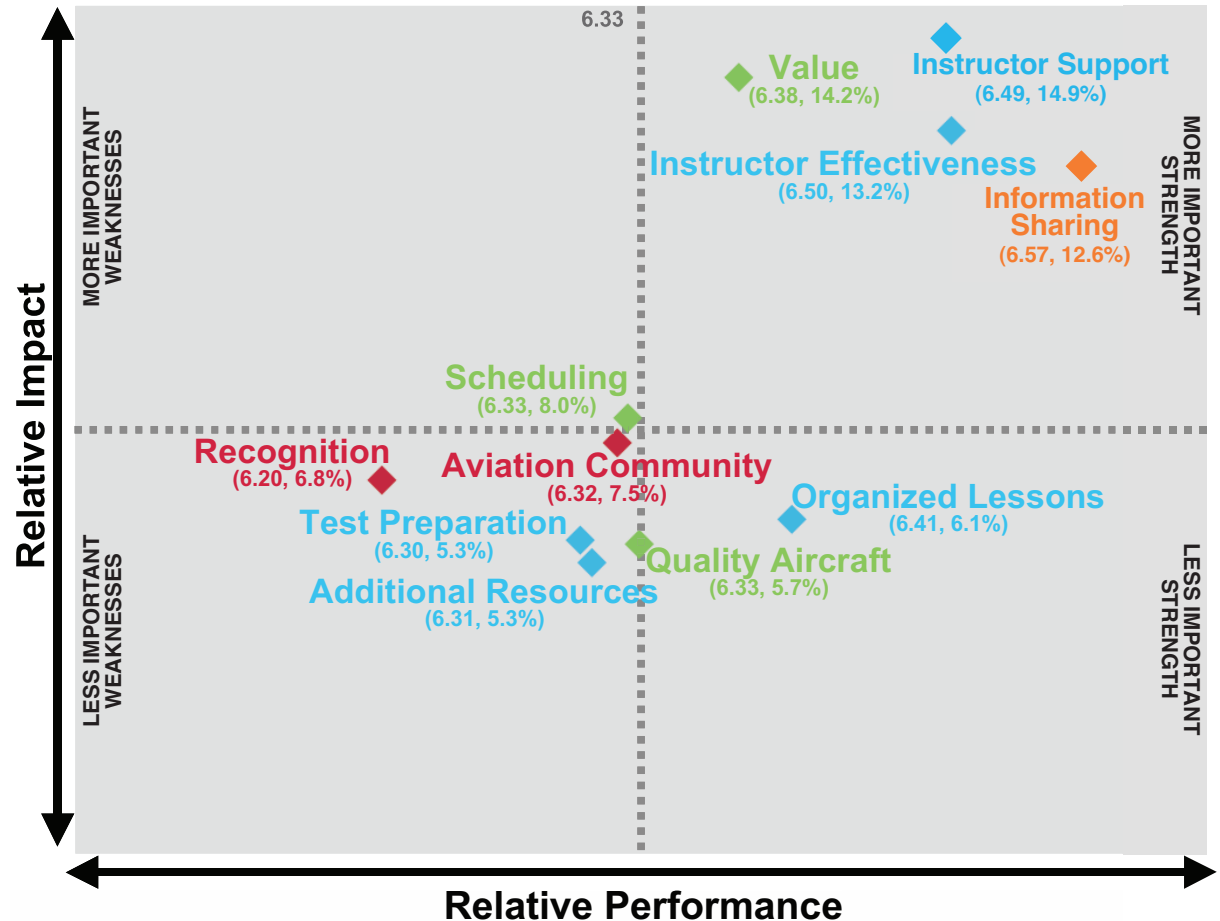
Overview



- Eleven distinct factors emerged to define the expectations students have for the flight training experience
- They are correlated into four broad areas:
 - **Educational Quality:** Offering effective training from professional instructors who are dedicated to students' success
 - **Customer Focus:** Demonstrating professionalism in facilities, equipment, and engagement with the student to add value to the experience
 - **Community:** Emphasizing social connections and recognizing accomplishments
 - **Information Sharing:** Equalizing the power relationship between flight training providers and students—educating and empowering the consumer

Low-Hanging Fruit

- Many issues described are intractable, such as the basic economics of flight training
- However, the entire discussion was infused with a passion for flying and the unique accomplishment it represents
- Can we raise student commitment levels by a direct appeal to these values?



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Moving Forward

Next Steps

The APCO Insight[®] research is the first step in a long-term commitment to help improve the flight training experience and student pilot completion rates.

AOPA's plans for 2011 include:

Regional Meetings

During 2011, AOPA will host 12 meetings in six cities across the country to share information gleaned from this report and to hear more from student pilots, pilots, flight instructors, and flight schools about what works, what doesn't, and how AOPA can help.

Flight School Business

On March 1, 2011, AOPA will relaunch *Flight School Business*, a newsletter to share ideas, tips, and tactics with flight school operators and instructors in order to more closely align the school's offerings with what their students expect.

Online Tools

Later in 2011, AOPA will unveil online tools currently under development to support student pilots and their mentors.