



GENERAL AVIATION PUBLICATION READER PREFERENCE STUDY

**Conducted Among
FAA Certified Pilots**

Conducted by: Erdos & Morgan, Inc.
For: AOPA Pilot
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INTRODUCTION

In March of 2007, Erdos & Morgan was commissioned by AOPA Pilot to conduct a positioning survey among all certificated pilots. The content of the study included demographics, certificates and ratings held, types of aircraft owned, aviation purchases, Internet use, and readership of a list of seven aviation publications. In addition, respondents were asked to rate the same seven publications on a list of nine qualitative attributes.

The survey sample for this study was supplied by AIRPAC, Inc., located in Edmond, Oklahoma. Erdos & Morgan contracted with AIRPAC, Inc. to supply their total database of all FAA certificated aircraft pilots. Erdos & Morgan then eliminated pilots whose only certification was listed as balloon, control tower operator, flight engineer, glider, navigator, recreational, or where a certification type was not specified. Additionally all APO/FPO addresses and a number of non-individual names and addresses were removed, after which the balance of the names were reduced to the 5,000 called for in the survey specifications, by systematically eliminating every nth name. The survey sample, by virtue of its design and the way it was selected, ensures that the results of the study would be nationally representative of certificated general aviation aircraft pilots including all airline transport pilots, commercial pilots, private pilots, and student pilots.

Two versions of the questionnaire were developed in order to eliminate order bias. In the first, the publications were presented in alphabetical order, and in the second the publications were presented to the respondents in reverse alphabetical order. Every other name received the reverse alpha questionnaire.

On March 16, 2007, a questionnaire packet containing a four-page questionnaire, a cover letter on Erdos & Morgan letterhead, a one-dollar bill incentive, and a postage-paid reply envelope was sent to the entire 5,000-member survey sample. A follow-up questionnaire mailing was sent on April 18, 2007, to non-respondents. No incentive was included in this follow-up mailing. Completed questionnaires were returned directly to the offices of Erdos & Morgan, and at no time was AOPA Pilot identified as the sponsor of the survey.

By the study closing date of May 21, 2007, a total of 1,185 usable questionnaires had been received. This number represents 24.1% of the net effective survey sample, since there were 91 Post Office returns. The response rate is consistent with similar recent studies conducted by Erdos & Morgan. All completed questionnaires received by the close of field, and none received thereafter, were included in the tabulations.

Erdos & Morgan prepared percentages and other calculations herein in accordance with accepted research practice

Nicholas J. Ferrari

A handwritten signature in blue ink, reading "Nicholas J. Ferrari". The signature is fluid and cursive, with a prominent initial "N" and "F".

Chief Executive Officer

DEMOGRAPHIC CHARACTERISTICS

GENDER AND AGE

95% of the respondents are male.
Their average age is 50 years; their median age is 52 years.

HOUSEHOLD INCOME

QUESTION: Which of the following best describes your total household income, before taxes, in 2006? (Please include income from yourself and all other persons living in your household from all sources. For example: wages, bonuses, profits, dividends, rental income, interest, social security, unemployment/workmen's compensation, retirement pay, alimony, child support, etc.)

Median	\$124,000
Average	\$201,000

NET WORTH

QUESTION: Which of the following best describes your current net worth for you and all the members of your household? (Please include all assets such as investments, insurance, home, other real estate, jewelry, auto, etc.)

Median	\$ 658,000
Average	\$1,158,000

OCCUPATIONAL STATUS

QUESTION: At the present time, what is your occupational status? (Please check only one.)

Employed full-time	70%
Employed part-time	10
Retired	16
Not employed	4

DEMOGRAPHIC CHARACTERISTICS

(CONTINUED)

JOB TITLE / POSITION

QUESTION: What is your title or position? (Please be specific. For example: Owner, President, Chief Pilot, Salesperson, etc.)

26% of the respondents hold Pilot/Flight Instructor positions including the following job titles: Pilot, Captain, Chief Flight Instructor, First Officer, Line Pilot and Chief Pilot.

30% of the respondents are in Top Management positions including the following job titles: Owner/Partner, Chairman of the Board, President/CEO, Vice President, Treasurer, Executive Director, etc.

19% of the respondents hold Professional or Technical positions to include: Doctor, Lawyer, Engineer, Technician and other professional.

PROFESSION/INDUSTRY

QUESTION: In what kind of business, industry or profession are you employed? (Please describe the activity at the location where you are employed. For example: hospital, newspaper publishing, auto engine manufacturing, etc.)

THE TOP 5 RANKED INDUSTRIES OR PROFESSIONS AMONG EMPLOYED RESPONDENTS ARE:

Aviation related	30%
Manufacturing	9
Other services (excluding public administration)	7
Construction	6
Health care and social assistance	5

CERTIFICATES, RATINGS AND FLYING ACTIVITY

HIGHEST TYPE OF CERTIFICATE HELD

QUESTION: Please indicate the highest type of certificate you hold.

Student	6%
Private	47
Commercial	25
ATP	21
Do not hold any certificates	1

CERTIFIED FLIGHT INSTRUCTOR (CFI) STATUS

QUESTION: Do you have a certified flight instructor (CFI) certificate?

Yes	23%
No	77

TYPES OF RATING(S) HELD

QUESTION: Please indicate which of the following ratings you hold.*

Single-engine	87%
Multi-engine	40
Instrument	56
Glider	5
Lighter-than-air	1
Seaplane	11
Other rating	10
Do not hold any rating	4

*NOTE: Total will add to more than 100% because of multiple responses.

CERTIFICATES, RATINGS AND FLYING ACTIVITY

(CONTINUED)

TYPES OF AIRCRAFT REGULARLY FLOWN

QUESTION: Please indicate the types of general aviation aircraft you regularly fly.*

Single-engine, fixed gear	71%
Single-engine, retractable gear	29
Multi-engine piston	14
Single-engine turboprop	3
Multi-engine turboprop	5
Turbofan/turbojet	10
Rotary wing (turbine)	4
Rotary wing (piston)	2
None of those listed	6

*NOTE: Total will add to more than 100% because of multiple responses.

AIRCRAFT OWNERSHIP/LEASING

QUESTION: Do you personally, or does your company own or lease any aircraft?*

I personally own/lease aircraft	48%
The company I own (or am a partner in) owns/leases aircraft	8
The company I work for (but do not own) owns/leases aircraft	25
No, neither I nor my company owns/leases aircraft	27

*NOTE: Total will add to more than 100% because of multiple responses.

PURCHASING

AVIATION PURCHASES

QUESTION: In the **past three years**, have you purchased, or do you plan to purchase in the next two years, any of the following?

	Purchased <i>(past 3 years)</i>	Plan to Purchase <i>(next 2 years)</i>
New General Aviation Aircraft	12%	17%
Used General Aviation Aircraft	22	23
Aircraft Financing	10	16
Aircraft Insurance	52	47
Recurrent Flight Training	49	54
Pilot Supplies	84	67
Avionics and Aircraft Systems	31	33
Parts, Supplies, Accessories	41	32

PURCHASING CYCLE

QUESTION: For each of the communication/information items listed below, please indicate how you use that item in the purchasing cycle.

ADVERTISING IN PUBLICATIONS

Use		85%
Gain product awareness	64%	
Basic information gathering	51	
Develop a brand preference	12	
Final brand or model decision	8	
Don't use		15

FEATURE ARTICLES IN PUBLICATIONS

Use		82%
Gain product awareness	43%	
Basic information gathering	57	
Develop a brand preference	20	
Final brand or model decision	13	
Don't use		18

TRADE SHOW VISITS

Use		57%
Gain product awareness	30%	
Basic information gathering	33	
Develop a brand preference	17	
Final brand or model decision	14	
Don't use		43

PURCHASING CYCLE (CONT'D.)

QUESTION: For each of the communication/information items listed below, please indicate how you use that item in the purchasing cycle.

OTHER PILOTS AND OWNERS

Use		82%
Gain product awareness	41%	
Basic information gathering	50	
Develop a brand preference	33	
Final brand or model decision	25	
Don't use		18

MANUFACTURER'S SALES PEOPLE

Use		53%
Gain product awareness	23%	
Basic information gathering	32	
Develop a brand preference	10	
Final brand or model decision	9	
Don't use		47

THE INTERNET

Use		83%
Gain product awareness	48%	
Basic information gathering	61	
Develop a brand preference	28	
Final brand or model decision	25	
Don't use		17

PURCHASING CYCLE (CONT'D.)

QUESTION: For each of the communication/information items listed below, please indicate how you use that item in the purchasing cycle.

DIRECT MAIL

Use		46%
Gain product awareness	28%	
Basic information gathering	25	
Develop a brand preference	3	
Final brand or model decision	2	
Don't use		54

EMAIL

Use		41%
Gain product awareness	23%	
Basic information gathering	23	
Develop a brand preference	4	
Final brand or model decision	3	
Don't use		59

MANUFACTURER'S BROCHURES

Use		69%
Gain product awareness	37%	
Basic information gathering	48	
Develop a brand preference	15	
Final brand or model decision	11	
Don't use		31

INTERNET USE

Almost all (95%) of the respondents access aviation-related Internet sites in a typical week... an average of 4.1 times.

QUESTION: What is your most frequented website related to general aviation?

THE TOP THREE WEBSITES ARE:

AOPA.org	40%
DUATS.com	6
AVWEB.com	5

*QUESTION: Under Column A, please indicate which of the following have influenced you to visit particular aviation website(s). Then, under Column B, please indicate what you consider to be the **three most influential** factors.*

	<u>A</u> Influenced to Visit Particular Website(s)	<u>B</u> Three Most Influential
Magazine advertising	78%	73%
Friend/Associate	70	60
Company or product brochure	46	35
Online/Email newsletter	35	28
Email	34	21
Web advertising	30	22
Direct mail	26	15
Printed newsletter	21	12

INTERNET USE

(CONTINUED)

QUESTION: Please indicate your five main uses of the Internet. Please use a scale of 1–5 with “1” meaning “the most used” function, and “5” meaning the “least used” function.

#1 MAIN USE OF THE INTERNET

Email	66%
Research/Information	9
General aviation flight planning/weather briefing	8
Financial transactions/information	4
Read about general aviation news and information	4
Read about general interest/business news and information	3
Online purchasing	2
Travel planning/purchases	2
Sports/Entertainment information	1

QUESTION: Which of the various elements listed below do you believe would be most useful to visitors of general aviation manufacturers' websites?

THE TOP 10 ELEMENTS THAT WOULD BE MOST USEFUL TO VISITORS OF GENERAL AVIATION MANUFACTURERS' WEBSITES

Pricing information	85%
Product specifications	79
Product photographs	54
Parts listings and pricing	51
Contact phone numbers	50
Service and support information	47
Aircraft “virtual” tours	43
Direct order capability	41
Contact email address	38
Search capabilities	36

INTERNET USE

(CONTINUED)

QUESTION: Which of the following opt-in Internet aviation news services do you receive and read regularly?

AOPA ePilot Newsletter	84%
EAA e-hotline Newsletter	24
AvWeb Flash Newsletter	23
Aviation Week's Aviation Daily	6
NBAA Update Newsletter	6

ACTIVITIES/MEMBERSHIPS

QUESTION: In which of the following sports or outdoor activities do you participate?

THE TOP 5 SPORTS OR OUTDOOR ACTIVITIES IN WHICH PARTICIPATE

Walking	48%
Bicycling	42
Fishing	35
Golfing	31
Hiking	31

QUESTION: Which memberships do you maintain on a regular basis?

Aircraft Owners & Pilots Association (AOPA)	87%
Experimental Aircraft Association (EAA)	30
Air Line Pilots Association (ALPA)	8
National Business Aviation Association (NBAA)	5

PUBLICATION READERSHIP

QUESTION: How many of the last four issues of each publication have you read or looked through?

READ OR LOOKED THROUGH 3 OR 4 OUT OF LAST 4 ISSUES:

AOPA Pilot	84%
Flying	37
Sport Aviation	27
Plane & Pilot	21
Professional Pilot	12
Business & Commercial Aviation	11
Twin & Turbine	5

Base: Read any aviation publication 3 or 4 of past 4 issues.

EVALUATION OF PUBLICATIONS

PUBLICATION EVALUATIONS

QUESTION: Which of the following publications do you consider to be...

The one that has the highest credibility?

AOPA Pilot	64%
Flying	13
Business & Commercial Aviation	7
Professional Pilot	6
Sport Aviation	6
Plane & Pilot	4
Twin & Turbine	*

The one you rely on most for aviation news and information?

AOPA Pilot	65%
Flying	12
Business & Commercial Aviation	7
Sport Aviation	6
Plane & Pilot	5
Professional Pilot	5
Twin & Turbine	*

The one that delivers the most news you could not find anywhere else?

AOPA Pilot	59%
Flying	11
Business & Commercial Aviation	9
Sport Aviation	9
Professional Pilot	7
Plane & Pilot	5
Twin & Turbine	*

* Less than 0.5%.

PUBLICATION EVALUATIONS (CONT'D.)

The one that is most useful to you in your work?

AOPA Pilot	53%
Business & Commercial Aviation	11
Flying	11
Professional Pilot	11
Sport Aviation	9
Plane & Pilot	4
Twin & Turbine	1

The most accurate editorially?

AOPA Pilot	62%
Flying	14
Business & Commercial Aviation	7
Professional Pilot	7
Sport Aviation	6
Plane & Pilot	4
Twin & Turbine	*

The most valuable reference?

AOPA Pilot	57%
Sport Aviation	12
Flying	11
Business & Commercial Aviation	8
Professional Pilot	7
Plane & Pilot	5
Twin & Turbine	*

*Less than 0.5%

PUBLICATION EVALUATIONS (CONT'D.)

The most serious and authoritative?

AOPA Pilot	64%
Flying	12
Business & Commercial Aviation	10
Professional Pilot	7
Sport Aviation	4
Plane & Pilot	2
Twin & Turbine	1

The one that is most objective?

AOPA Pilot	55%
Flying	17
Business & Commercial Aviation	8
Professional Pilot	7
Plane & Pilot	6
Sport Aviation	6
Twin & Turbine	1

The one that you would read if you could read only one of these publications?

AOPA Pilot	59%
Flying	13
Sport Aviation	9
Business & Commercial Aviation	8
Plane & Pilot	6
Professional Pilot	5
Twin & Turbine	*

*Less than 0.5%