

A survey of the AOPA membership reveals Association members own about two-thirds of the entire general aviation fleet and account for the lion's share of flight activities and aircraft and equipment purchases

# AOPA Members Cast Large Shadow

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■ ■ If you are an active pilot, the chances are better than one out of five that you are a member of AOPA, the ombudsman and servant of the private and business aircraft owner and pilot. Though constituting only about 22% of the total active pilot population, AOPAers own and operate from 69.7% to 71.6% of the entire general aviation fleet.

As a group, AOPA members last year accounted for almost 80% of the nearly 24 million hours logged by the total general aviation fleet. They spent nearly \$900 million to utilize and keep their aircraft running, to purchase new and used aircraft, and to buy airline tickets.

An estimated 19.2 million hours flown by Association members in their own aircraft last year is about 3.5 times greater than the total logged by the domestic airlines during the same period. In miles, the distance covered by AOPAers is equivalent to over 9,600 trips to the moon.

These and other substantive facts are disclosed in preliminary statistics from one of the most detailed and probing surveys of U.S. pilots ever undertaken by any private or Government group. The survey was conducted in January and February of this year by the non-profit AOPA and is the third in a series of biennial studies made by the Association. Nearly 47,000 pilots and aircraft owners in the 150,000-member AOPA participated in the voluntary survey.

A computerized preview of final tabulations revealed that, as a collective body under the one banner of "AOPA," members of the Association virtually are "general aviation."

Final results of the survey are expected to counteract and dispel oft-repeated statements that "general aviation" is composed of such a nebulous, ill-defined, and widespread group of individuals and organizations that it is impossible for some Federal regulators

and public officials to gauge its contributions and needs.

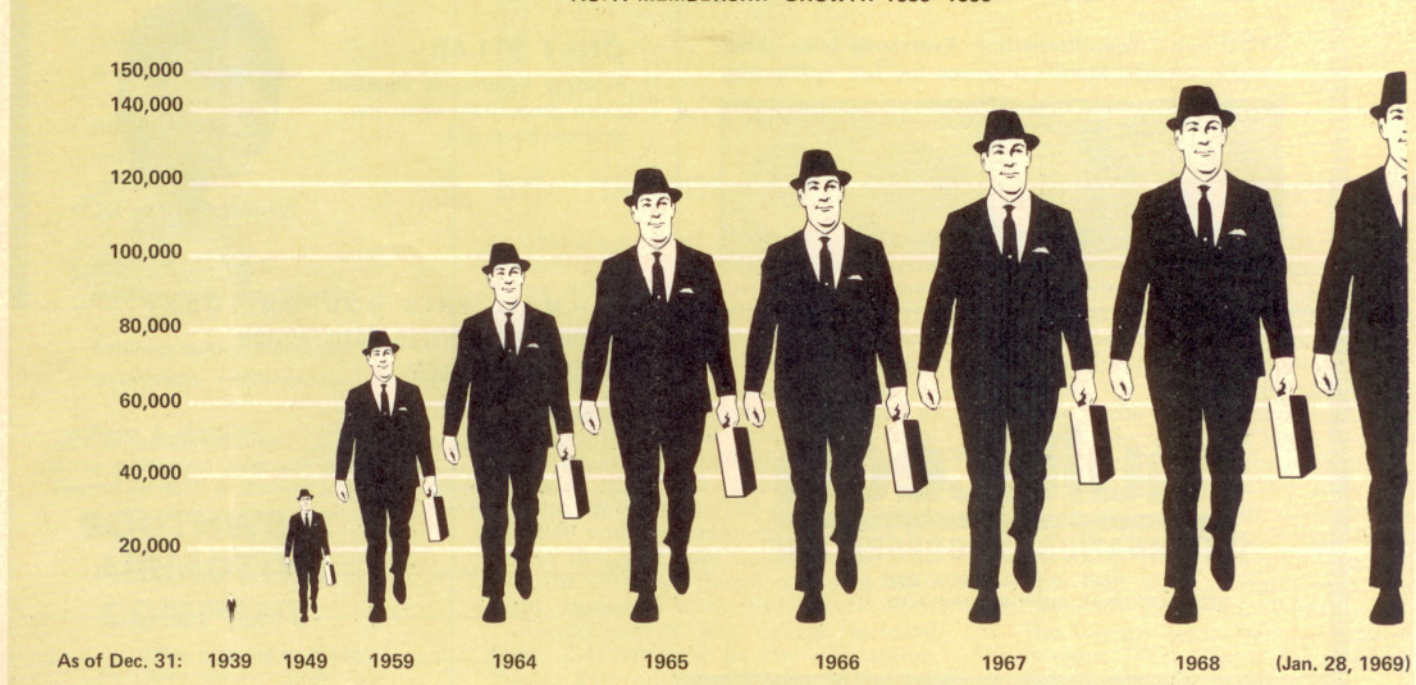
Though it is impossible to stereotype the private pilot and aircraft owner, results of the new survey will provide a composite picture of the AOPAer whose activities legitimately qualify him for the title of "Mr. General Aviation." The composite picture created by the survey basically should put a "handle" on who the general aviation pilot is and how he uses his aircraft.

Entitled "Pilot Poll," the new survey, consisting of lengthy questionnaires mailed to a total of 145,689 pilots and aircraft owners, presents a current "profile" of all AOPA members, their personal and professional status, aviation activities, and buying habits. The survey consisted of three separate parts: the entire AOPA membership; corporate aviation; and fixed-base operators.

The PILOT obtained a computer analysis of almost 50% of the nearly 47,000 returned questionnaires to provide AOPA members with a preview of the final results on AOPA's overall membership for inclusion in this edition of The PILOT, which marks AOPA's 30th Anniversary. Preliminary findings of the surveys spotlighting corporate aviation and fixed-base operators were not available at this writing. These separate findings will be featured in The PILOT in the near future.

A preliminary composite picture of the AOPA member reveals a person mainly between the ages of 25 and 49 (73.51%). For the most part, he makes anywhere from \$9,000 to \$40,000 (71.17%) and carries up to \$100,000 in life insurance (76.99%). He is married (84.78%), has three children or less (80.63%), and owns his own home (78.67%), which falls within the \$15,000 to \$60,000 class (78.33%).

AOPA MEMBERSHIP GROWTH 1939-1968



His total net worth is anywhere from \$20,000 to over \$100,000 (79.46%).

For a livelihood, the composite AOPA member is situated in almost every area of activity, but he is concentrated in manufacturing (15.11%); architecture and engineering (14.89%); civil aviation (14.65%); and medicine, dentistry, law and education (14.50%).

Though not closely aligned to any one business area, the AOPA member is mostly in the management class. According to the computer analysis: 34.57%, or 50,365 AOPA members, serve on top management teams in their respective fields of endeavor; 14.07%, or 20,498, are middle-management people; and 29.24%, or 42,599, are professional and technical people. Almost 2%, 2,564 members, are airline pilots, and another 1.09%, or 1,588, are air-taxi pilots.

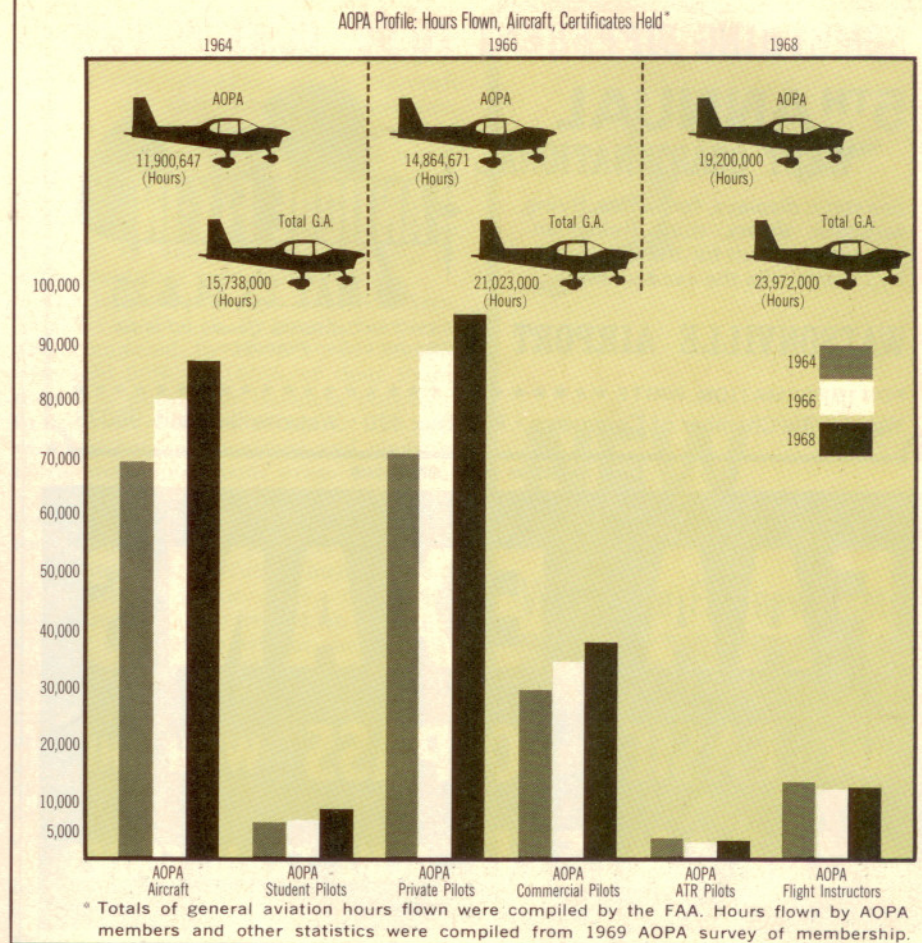
For his leisure time other than flying, the composite AOPA member prefers fishing (16.15%); golf (15.76%); hunting (14.97%); and boating (11.28%). About 77,288 (53.05%) members own two cars; 36,072 (24.76%) own a pleasure boat; and 26,531 (18.21%) maintain a summer or vacation home. Slightly more than 10% (about one out of every 15 members) hold some type of public office, and a significant 21.38%, or 31,148 members, serve on the board of directors of some business concern or association.

Though primarily and foremost a general aviation pilot and private flying enthusiast, the AOPA member is among the heaviest users of commercial airlines. During 1968, AOPA members purchased a combined total of \$177,103,622 in airline tickets. The airline tickets, about evenly split between business and pleasure trips, were equal to about \$1,200 for each AOPA member last year.

A detailed analysis of the flying activities of AOPA members reveals their enormous impact on the financial well-being of the total general aviation industry. A total of 81,353 members, or 55.84%, said they were owners or part owners of 87,650 aircraft which cost a combined total of about \$1.3 billion when they were purchased. They also reported plans to spend over \$1 billion more during the next 24 months to purchase new and used airplanes. That figure does not include costs of the many and varied sophisticated electronic items for the new aircraft to be purchased. Many electronic "black boxes" cost as much as some basic aircraft in the single-engine class.

Difficulty in pinpointing the exact percentage of the total general aviation fleet now owned by AOPA members arises from the fact that "official" figures on the number of aircraft in the fleet as of Jan. 1, 1969, had not been released by the FAA as of this writing.

In response to a query from The PILOT, FAA statisticians said preliminary estimates indicated the fleet numbered 122,500 heading into 1969. Based on this figure, the 87,650 aircraft owned and operated by AOPAers represent



71.6% of the total aircraft in the active fleet. On the other hand, AOPA has estimated the total general aviation fleet, as of Jan. 1, 1969, at 125,720 aircraft, which would indicate members own and operate 69.7% of the total fleet.

Continuing with the composite picture of the AOPA member, there is a better than one-to-four chance that he is instrument rated (25.93%) and holds at least a commercial pilot certificate (26.20%). But, for the most part, he holds a private pilot certificate (65.82%) for a single-engine land aircraft (86.72%).

The composite picture of the AOPA member created from the survey shows a split personality when it comes to being either an aircraft owner or a non-owner, according to the statistics related above. Regardless of whether he owns an airplane, he is a frequent renter of aircraft (67.79%), according to the survey.

That side of the composite AOPAer who owns an aircraft reveals he is primarily an owner of a two- to four-place, single-engine aircraft with a nonsupercharged piston engine ranging from 110 h.p. to 290 h.p. His current aircraft cost \$20,000 or less (77.18%), and he has been an aircraft owner for three years or longer (83.77%). There also is a three-to-one chance his current aircraft was bought second-hand (76.62%).

During 1968, the nearly 47,000 pilots and aircraft owners participating in the survey said they logged an average of

131.2 hours. Using a conservative cruising speed of 120 m.p.h., the average AOPAer's time in flight last year translates into about 15,744 miles, a distance equivalent to more than six trips from New York to Los Angeles.

The sheer number of instrument-rated members—25.93% of the total, or 37,777 members—undoubtedly makes AOPA the largest collecting point for the world's most proficient pilots. They represent about 31% of the total of 122,573 instrument-rated pilots on record with the FAA as of Jan. 1, 1968.

The 65.82%, or 95,892 AOPA members, who hold private pilot certificates represent about 34% of the nation's 281,728 active private pilots on record as of the first of this year. The 26.20%, or 38,171, who hold commercial pilot certificates account for about 23.3% of the 164,458 active commercial pilot certificates in the country at the start of 1969. There also are 3,540 AOPA members (2.43%) who hold Airline Transport (ATR) certificates. These members represent 12.3% of the 28,607 ATR pilots in the United States on Jan. 1, 1969.

Rounding out the AOPA membership is the member with a student pilot certificate. About 8,494 members, or 5.83% of the total membership, are student pilots. This figure is slightly less than 5% of the 209,406 student pilots on record with the FAA at the start of this year.

From the small number of student pilots in the AOPA and the fact that

Association members accounted for almost 80% of all hours logged by general aviation last year, it is readily apparent that student pilots account for only a minimal amount of flying in the United States.

Last winter the FAA released a report entitled, "Study To Determine the Flight Profile and Mission of the Certificated Private Pilot." A press release accompanying the report was widely circulated throughout the country and has been frequently quoted within the aviation community. The press release claimed "about half of the private pilots fly less than 50 hours a year and only 21% fly more than 100 hours a year."

According to the preliminary computer analysis of the AOPA survey, about 29.36%, or 42,775 members, flew 50 hours or less last year, while 42.72%, or 62,239 members, said they logged between 50 and 150 hours. In addition, 14.09%, or 20,528 members, said they piloted an aircraft between 150 and 250 hours during 1968; 6.34%, or 9,236 members, said they logged between 250 and 400 hours; and 6.39%, or 9,309 pilot members, said they were pilots in command of aircraft for more than 400 hours last year.

Asked to report how much they spent during 1968 for general maintenance and operation of their aircraft, AOPAers said they paid out a combined total of \$152,691,500 to keep their aircraft flying and hangared, plus spent another \$53,887,500 for equipment other than basic aircraft.

Taking the number of members who said they have owned their current aircraft for only one year or less (31,218), and multiplying that figure by the average cost of the airplanes they now own (\$1.3 billion divided by 87,650 aircraft = about \$15,000 per aircraft), indicates AOPAers spent \$468,270,000 on new and used aircraft during 1968. This amount is equal to more than four-fifths of the general aviation industry's estimated total of \$559 million for new aircraft retail sales last year.

Further rounding out the 1968 financial contributions AOPA members made to the general aviation community is the fact that an estimated 80% of the aircraft owners carry hull and liability insurance. This insurance coverage costs an average of \$400 per year per aircraft, according to one of the nation's leading aircraft insurance companies.

Injecting a slight unknown into the preliminary tabulations was the fact that the wording of the questionnaire regarding general operations and maintenance cost estimates for 1968 might not have been interpreted in the same manner by all those answering the questions. For the sake of the initial sampling, it was assumed that costs of insurance and taxes were excluded from the reports on general operations and maintenance.

Coupling general operations and maintenance expenses (\$152,691,500) with the money spent for equipment (\$53,887,500) and aircraft purchases (\$468,270,000), then adding a conserva-

tive estimate of yearly personal property taxes on each aircraft ( $87,650 \times \$50 = \$4,382,500$ ), plus insurance expenses ( $70,120 \text{ aircraft} \times \$400 = \$28,048,000$ ), produces a conservative figure of \$707,279,500 which is directly traceable to AOPA members as their contribution last year to the financial health of the general aviation community.

Adding the additional \$177,103,622 in commercial airline tickets bought by AOPA members last year would boost their minimum estimated total contributions to civil aviation to a staggering \$884,383,122.

This total figure is considered conservative because it does not take into account the additional hundreds of thousands, and possibly millions, of dollars which AOPA members spent at airports and cities they visited either on business or pleasure during 1968. Preliminary findings of the AOPA survey indicated Association members spent a combined total of \$123,754,500 last year on their vacations, but the figure also included transportation costs.

Looking at the individual types of aircraft solely or partly owned by AOPA members shows a preponderance of single-engine aircraft. AOPAers own all or part of 75,715 single-engine aircraft and 11,935 multi-engine aircraft, according to the preliminary findings. All but a very few of the multi-engine aircraft are of the twin-engine variety. Members also indicated they owned about 464 helicopters.

The 75,715 single-engine aircraft had the following classification of powerplants: under 110 h.p., 15.46%, or 12,577; 110-165 h.p., 27.50%, or 22,372; 165-210 h.p., 16.96%, or 13,797; 210-290 h.p., 30.66%, or 24,943; and over 290 h.p., 2.49%, or 2,026.

Of those members indicating the seating capacity of their respective aircraft, the largest percentage said they have four-place aircraft. Two-place aircraft filled out the number two spot, and six-place and five-place aircraft were third and fourth, respectively.

Slightly more than 25%, or 21,103, of the aircraft owners reported they have owned an aircraft for more than 10 years; 25.06%, or 21,070, said they have been aircraft owners between five and 10 years. New airplane owners (those who bought their first aircraft during the last 12 months) numbered 13,124, or 15.61% of the total.

The remaining owners were classified as follows: 13%, or 10,930, have been aircraft owners for two years; 11.42%, or 9,602, for three years; and 9.19%, or 7,727, for four years. Owners also were asked how long they had owned their current aircraft. The results were: one year, 37.13%, or 31,218; two years, 21.92%, or 18,430; three years, 14.99%, or 12,603; four years, 8.74%, or 7,348; five years, 5.18%, or 4,355; and more than five years, 10.82%, or 9,148. Approximately three-fourths of the aircraft currently owned by AOPA members were purchased as used airplanes, according to the survey.

Price-wise, the heaviest concentration

of aircraft now owned by AOPA members fell within the \$5,000 to \$15,000 class when they were purchased. There were 39,029 (46.42%) of the aircraft owners in this category. However, 19.26%, or 16,193 members, reported their current aircraft cost them under \$5,000; 13.60%, or 11,435, said they paid between \$20,001 and \$35,000; 4.66%, or 3,918, said they paid from \$35,001 to \$50,000; and 4.54%, or 3,818, said they paid over \$50,000.

The largest single group of AOPAers, 25.51%, or 21,448, fly purely for pleasure, compared to 19.18%, or 16,126, who said 90% to 100% of their flying time was purely for business purposes. In between the two extremes, the percentages between business and pleasure flying were split about even. A total of 4,458 members, or 8.87%, indicated their piloting was equally divided between business and pleasure flying.

Delving into the future buying habits of members, about 41%, or 59,805 members, said they would be buying a new or used plane within the next 24 months. About 17.39%, or 10,400 of the potential buyers, said they planned to purchase a new aircraft, and 59.03%, or 35,303, said they would buy used airplanes. The remainder, almost 25% of the total, said they were undecided on whether they would buy a new or used airplane.

Regardless of whether the aircraft to be purchased over the next 24 months is new or used, the largest group of potential AOPA buyers, 26.20%, or 15,669 members, stated they would be seeking an aircraft within the \$5,000 to \$10,000 class. Another 11.84%, or 7,081 members, said they would be delving into the under \$5,000 market.

The remaining potential buyers were divided as follows: \$10,000 to \$15,000, 18.96%, or 11,399 members; \$15,000 to \$20,000, 12.33%, or 7,374 members; \$20,000 to \$25,000, 6.33%, or 3,786 members; and 6.02%, or 3,600 members, more than \$50,000. Almost 2%—about 1,142 AOPAers—indicated they would be looking for aircraft priced at more than \$100,000, according to preliminary findings of the survey. The prices of new airplanes sought did not include the cost of avionics.

Based on their stated intentions as projected in the survey, AOPAers will be in the market for a combined total of \$1,056,122,500 worth of new and used aircraft over the next 24 months. This figure does not include the cost of avionics for the new aircraft to be purchased, or the cost of avionics which might be purchased as additional equipment for currently owned aircraft.

All of the preceding facts and figures, along with many more uncovered in the new AOPA survey, clearly show that pilots and aircraft owners in the AOPA account for the bulk of the flying hours logged each year in the United States, plus they show that the financial contributions by members are of critical importance to the general aviation community in particular, and are of major significance to the overall civil aviation economy. □