

May 22, 2012

**Report on the COPA 2012
Membership Survey**

**Keith Christopher PhD
Principal Consultant**

COPA 2012 Membership Survey Report

Purpose

The purpose of this survey was to determine how well the Canadian Owners and Pilots Association (COPA) was meeting the needs of its members, and to discover how the Association can continue to improve the services it provides.

Methodology

The member satisfaction survey was updated by making some modifications to the COPA 2007 Membership Survey Questionnaire. (See the COPA Membership Survey 2012 in the Appendix--pp 53-56.)

On January 23, 2012, 1028 advance notices were mailed to a stratified sample of COPA members. The sample was stratified (organized) by the Canadian provinces and Territories and then randomized to be representative of the COPA population of approximately 17,200 members. On January 30, 2012, 1028 survey questionnaires were mailed to this stratified sample.

Additionally, to provide all COPA members with the opportunity to respond to the survey, an online survey was posted to the COPA Web site on February 6, 2012. With this online survey, it was clearly stated that this survey was intended only for members who had not been selected in the sample for the mail survey.

To increase the response rate, two reminders was emailed to the sample on February 13 and on February 20, respectively. For the approximately 30% of the sample who did not have an email address, one reminder was mailed to them on February 15, 2012.

Additionally, to further increase the response rate, a draw was held providing five prizes for those who responded to the paper survey as well as five prizes for those members who completed the survey online. Both the paper and web surveys were heavily promoted in COPA Flight, the e-NewsFlash and on the COPA Web site.

The deadline for mailing in the paper survey was set at February 22 and for the online survey the link was taken down on March 12. Because of the timing to receive completed surveys by mail, we continued to process mail surveys through the week of March 12.

Three hundred and sixty-one (361) of the 1028 sample who received the survey by mail completed it, and 220 completed the survey online. To determine if there were any meaningful differences between those who responded to the paper

survey and those who did not respond (the non-respondents), one hundred (100) of these non-respondents were contacted by phone and asked to answer a number of key survey questions (see in Appendix). These one hundred were selected from across the country and included a number of Francophones. The online surveys were also assessed for their responses to these key questions.

There were no meaningful differences in the responses to the key questions observed among the survey participants in the paper survey, in the online survey, or in the telephone survey. Additionally, the representativeness of the survey sample by proportion of respondents according to province and territory was confirmed (see graph).

Therefore, there is a high probability that the responses reported here reflect those of the COPA membership. The final response rate stood at 681 (361 + 220 + 100). From a population of 17,154, a sample of 681 gives us an interval of ± 3.68 at the 95% confidence level (i.e., 19 times out of 20).

Definitions

When you review the graphs in this survey report, you will observe two terms that appear frequently. These terms are mean and standard deviation. In order that you understand these terms, they are described below:

Mean—also known as an arithmetic mean is the average score. It is obtained by adding the scores (a score is what a client selects on the 1-5 scale as the rating for a particular question) and dividing all these scores by the total number of scoring responses.

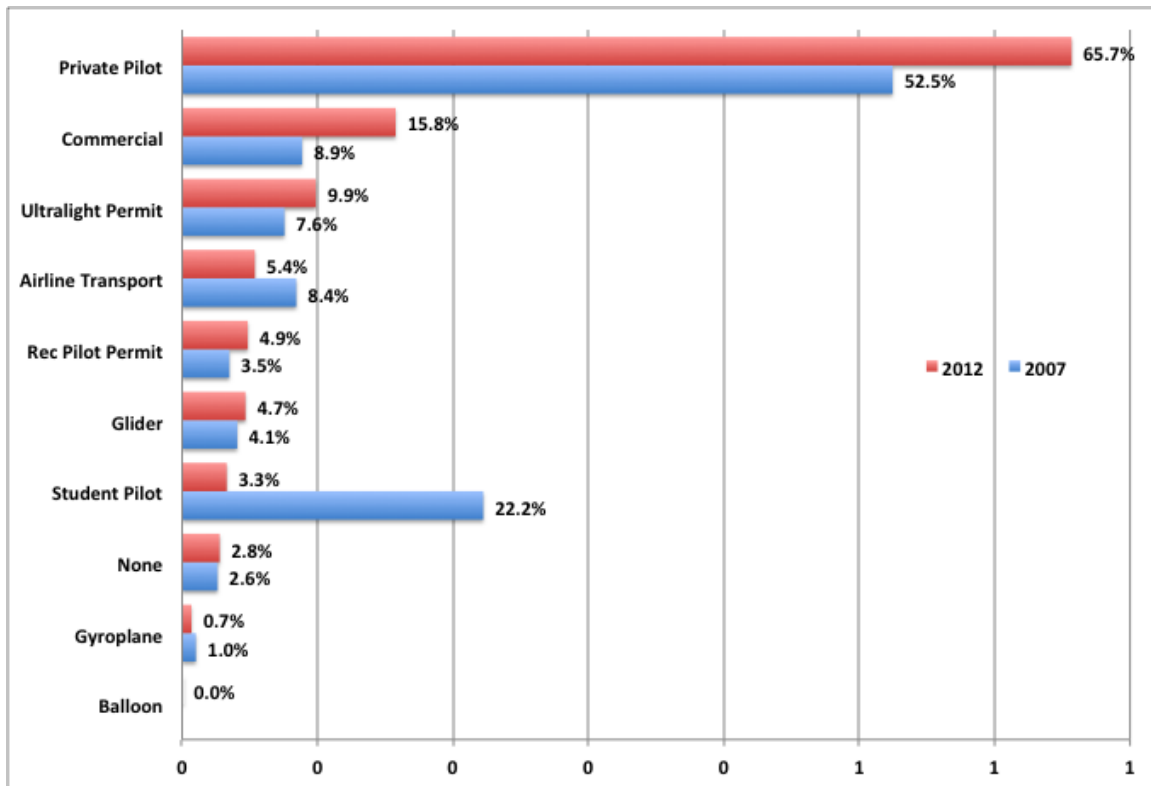
Standard Deviation—is a measure of the dispersion of the numbers around a mean.

On a scale of 1-5, which is a continuum, a mean of 4 or better is very good and a standard deviation of less than one (1) means that most respondents scored a particular question similarly.

Results (The results are presented graphically in the order they appear in the survey questionnaire)

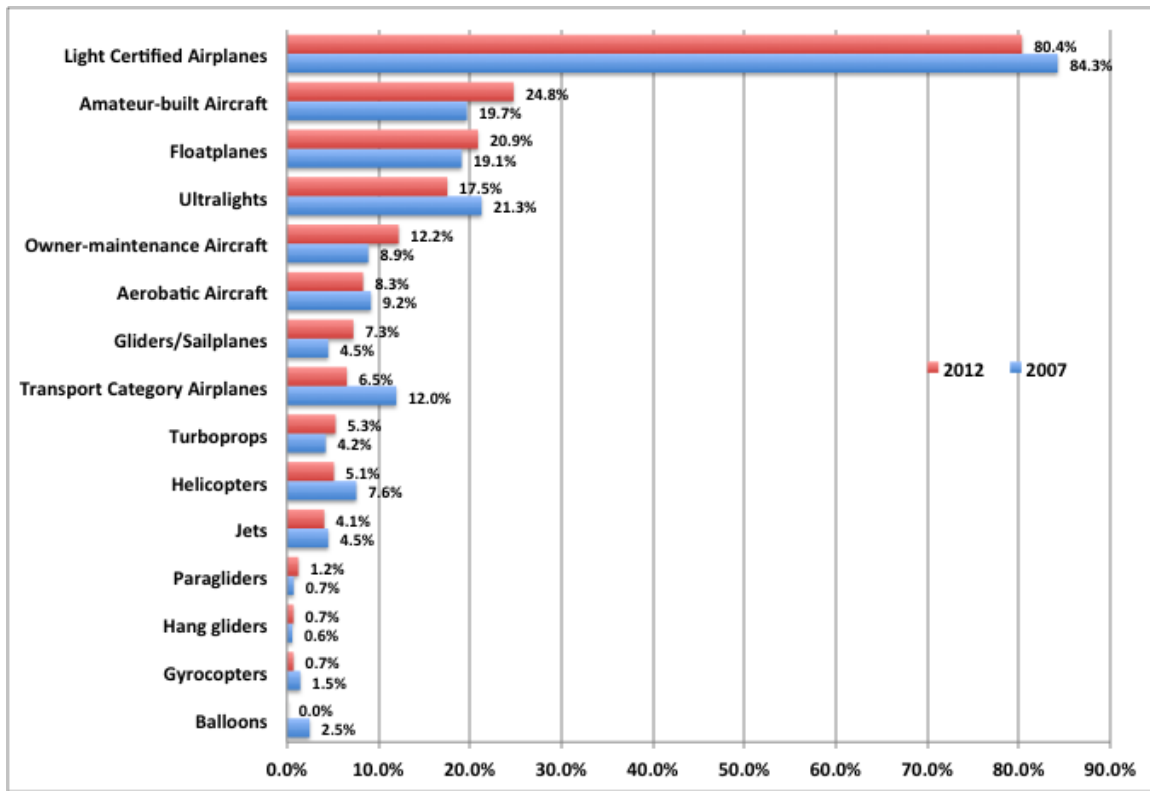
A. Please tell us about your current flying (check all applicable)

1. Pilot licence or permit held



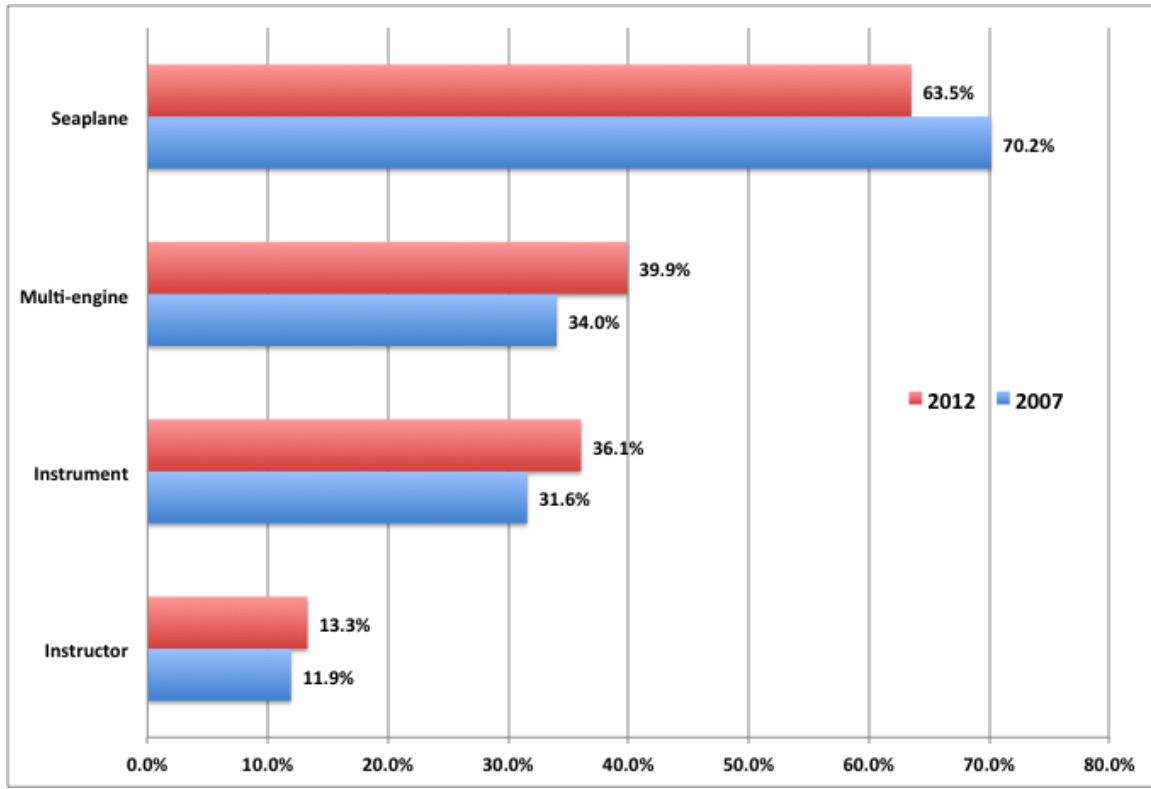
The results are similar to those from the 2007 survey. The most common pilot licence or permit held is private pilot and gyroplane is among the very least. Commercial now rates second in frequency whereas in 2007 it was third, and student pilot which was second in 2007 is now seventh.

2. Types of aircraft flown



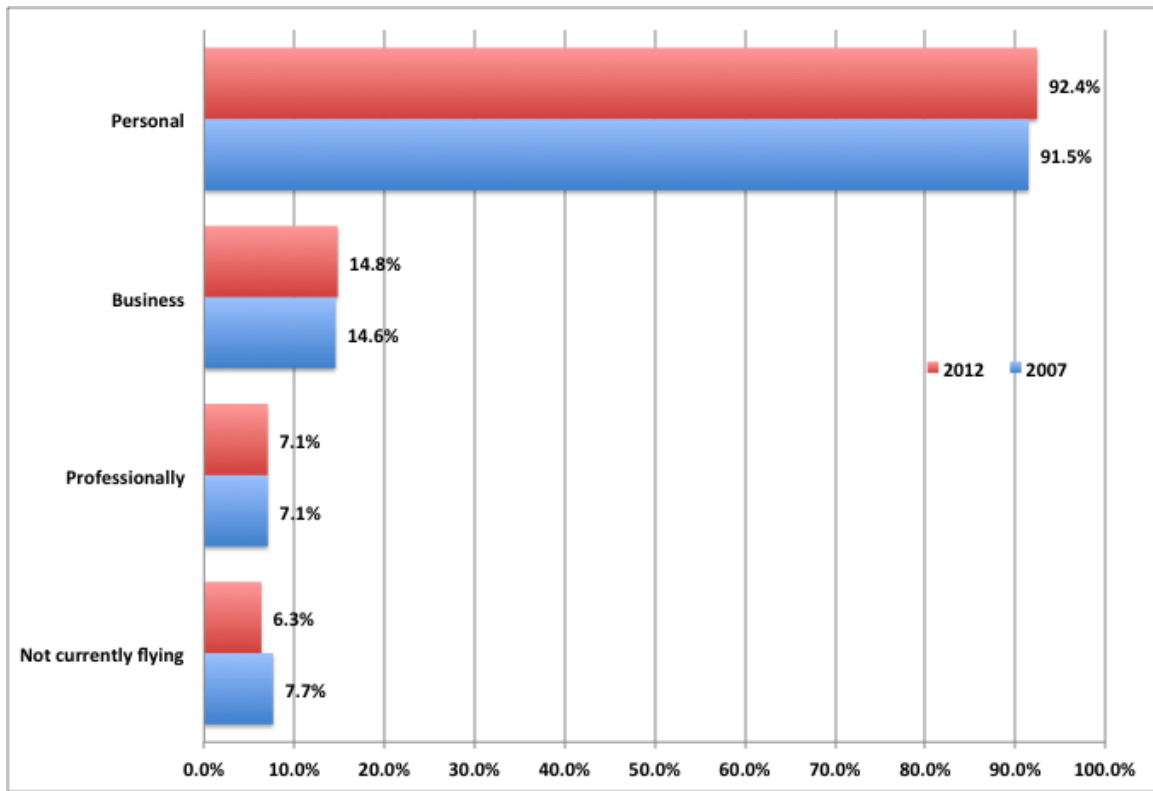
The relative frequency of the various types of aircraft flown is similar to those reported in the 2007 survey. There are a few notable changes in position: Amateur-built Aircraft have moved up to second place from third, Floatplanes moved up to third from fourth position, and Ultralights have moved down from second to fourth position; Owner-maintenance Aircraft have moved up to fifth position from seventh; Transport Category Airplanes have moved down from fifth position in 2007 to eighth; and while no one reported flying a Balloon in this survey, 2.5% did in 2007.

3. Ratings



These rankings from Seaplane to Instructor are identical to those noted in the 2007 survey, though the percentages vary somewhat. Note: we observed an error in how this graph was calculated in the 2007 survey and corrected it here. It is important to note, however, that this calculation error did not affect the profile of these ratings in the 2007 survey report and had no affect on the results.

4. Do you fly for



These percentages are almost identical to those reported in the 2007 survey. The only significant difference is that the "Professionally" and "Not currently flying" categories are reversed in this survey compared to the 2007 survey.

5. a) Total pilot hours (all types):

| | 2007 | 2012 |
|----------|-----------|-----------|
| Mean: | 1,877.39 | 2,027.60 |
| Median: | 600.00 | 680.00 |
| Minimum: | 7.00 | 0.00 |
| Maximum: | 32,000.00 | 31,000.00 |
| Std Dev: | 4,237.97 | 4,223.42 |

b) How many years have you been flying:

| | 2007 | 2012 |
|----------|-------|-------|
| Mean: | 22.50 | 23.93 |
| Median: | 22.00 | 22.00 |
| Minimum: | 1.00 | 0.00 |
| Maximum: | 78.00 | 67.00 |
| Std Dev: | 15.20 | 15.56 |

These results for 5a) and 5b) are very similar to those reported in the 2007 survey.

c) At what age did you begin your ab-initio training:

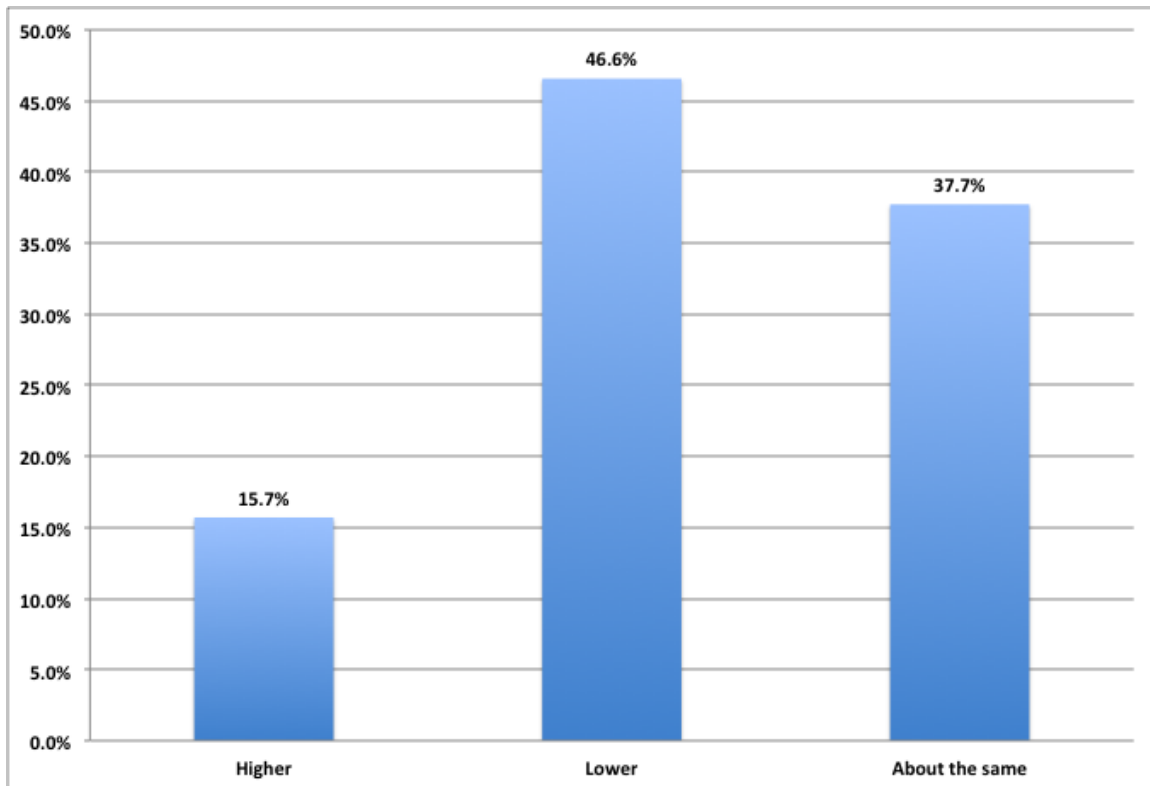
| | |
|----------|-------|
| Mean: | 29.97 |
| Median: | 27.00 |
| Minimum: | 0.00 |
| Maximum: | 72.00 |
| Std Dev: | 12.40 |

6. a) Total pilot hours flown during 20011 (all types):

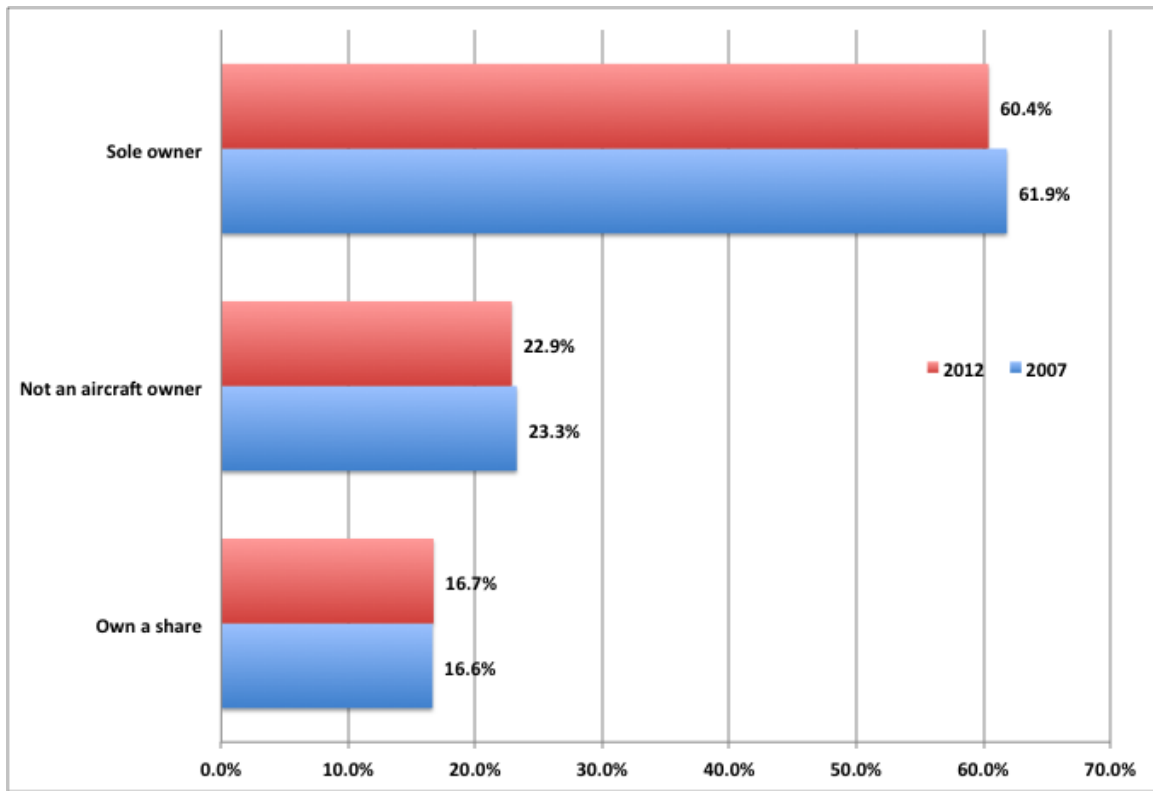
| | 2007 | 2012 |
|----------|--------|--------|
| Mean: | 61.88 | 56.87 |
| Median: | 40.00 | 27.00 |
| Minimum: | 0.50 | 0.00 |
| Maximum: | 900.00 | 970.00 |
| Std Dev: | 116.14 | 100.90 |

These results are similar to those reported in the 2007 survey. Only the median, which is the exact middle (40.00 vs 27.00) of a distribution, differs noticeably; however, the mean, the average, is close (61.88 vs 56.87)

b) How does this compare with the annual hours flown over the last five years:

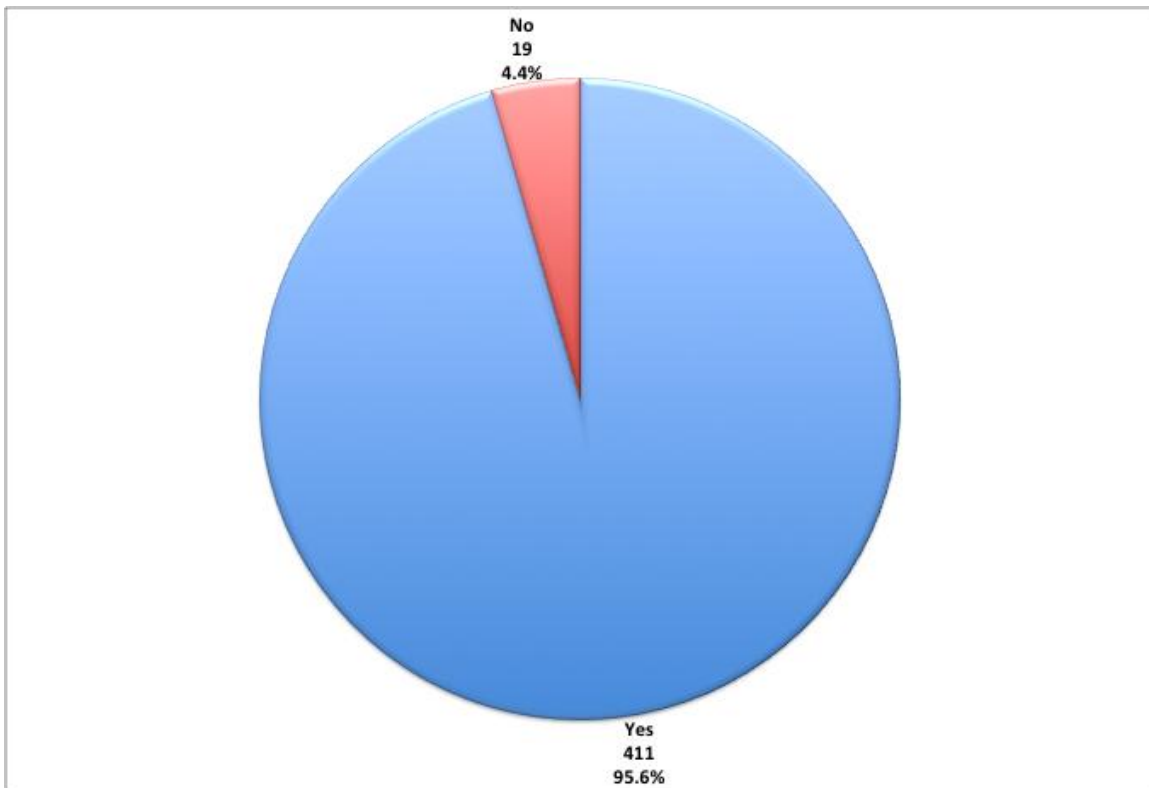


7. a) Do you own an aircraft?



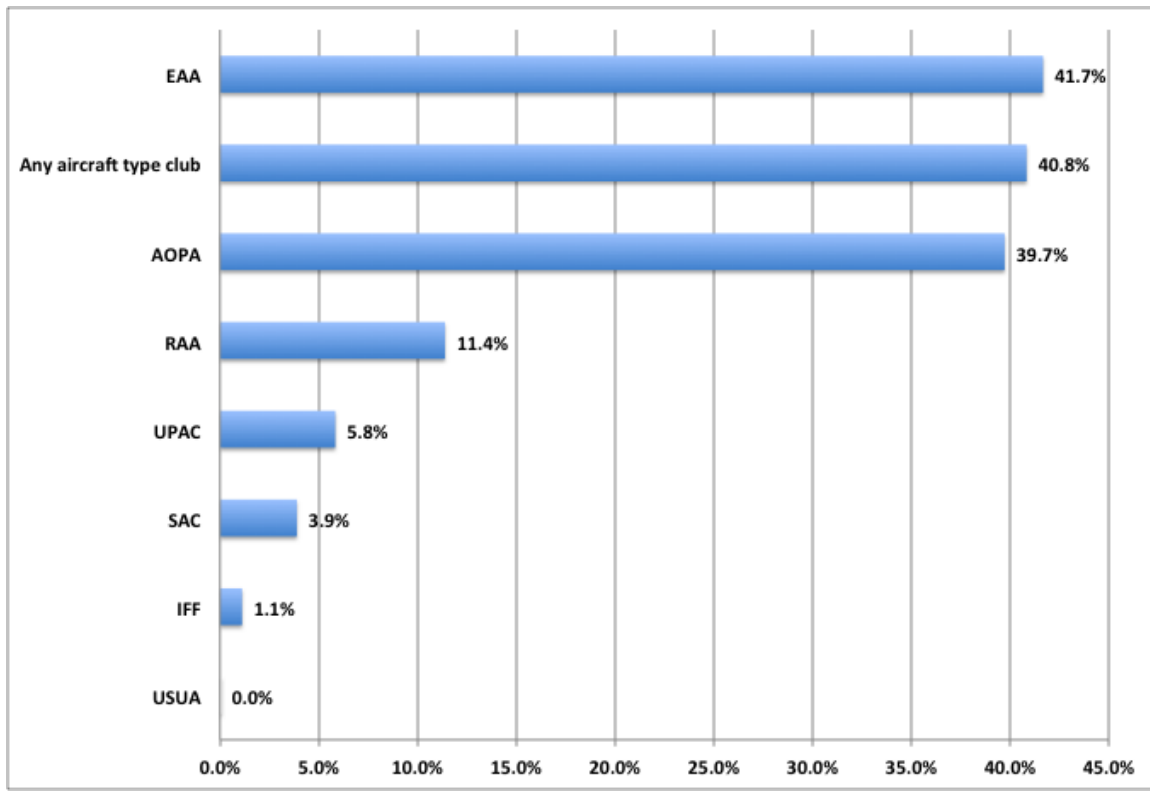
The percentages in these categories are almost identical to those reported in the 2007 survey.

b) If you own an aircraft, does it have an electric system?



From this graph, it is clear that most owners do have an electric system in their aircrafts.

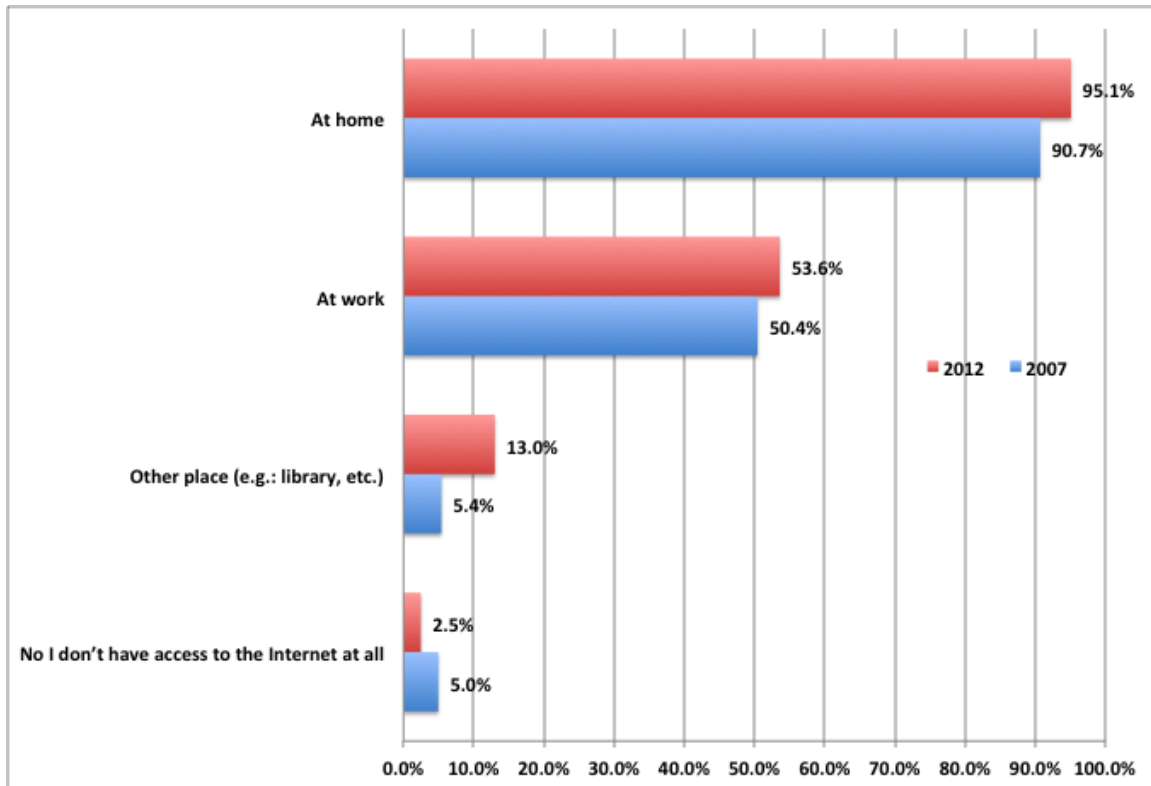
8. Are you also a member of any of the following?



These results are similar to those reported in 2007. What is notable is that AOPA and EAA have reversed in frequency of choice, with AOPA being first in 2007 and EAA being third.

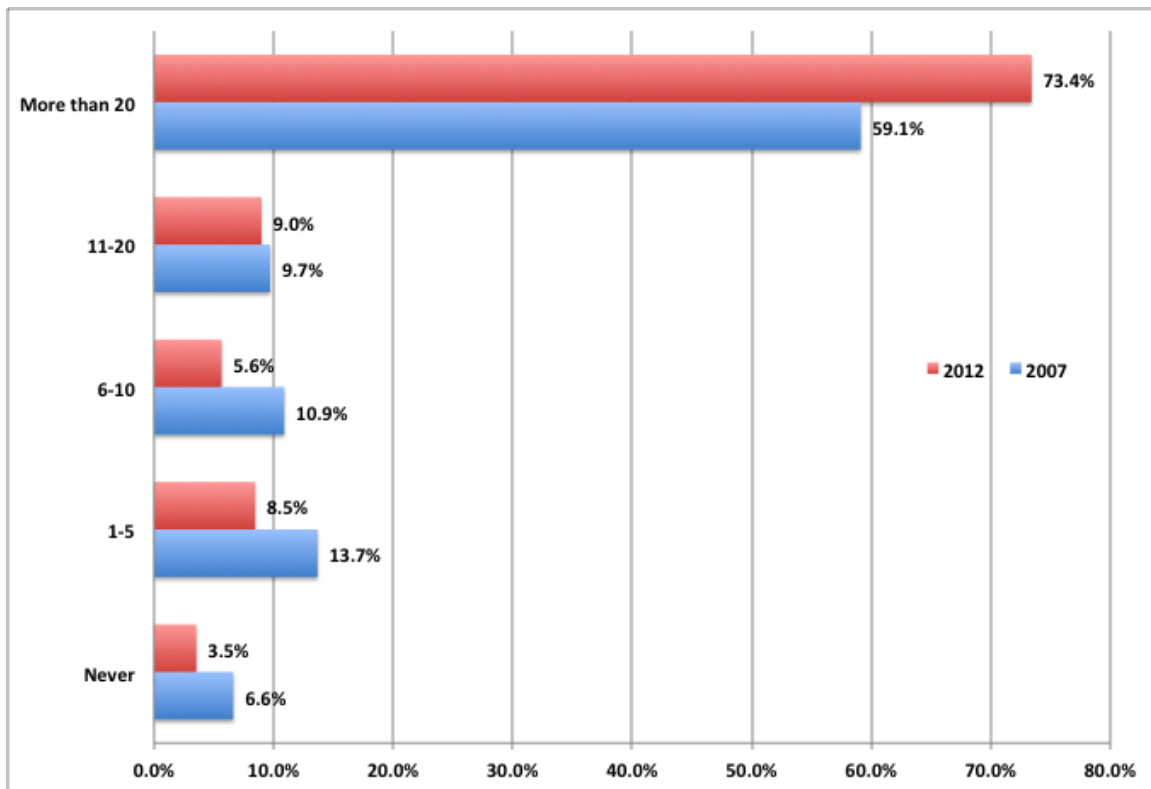
B. Please tell us about your use of computers

1. Do you have access to the Internet?



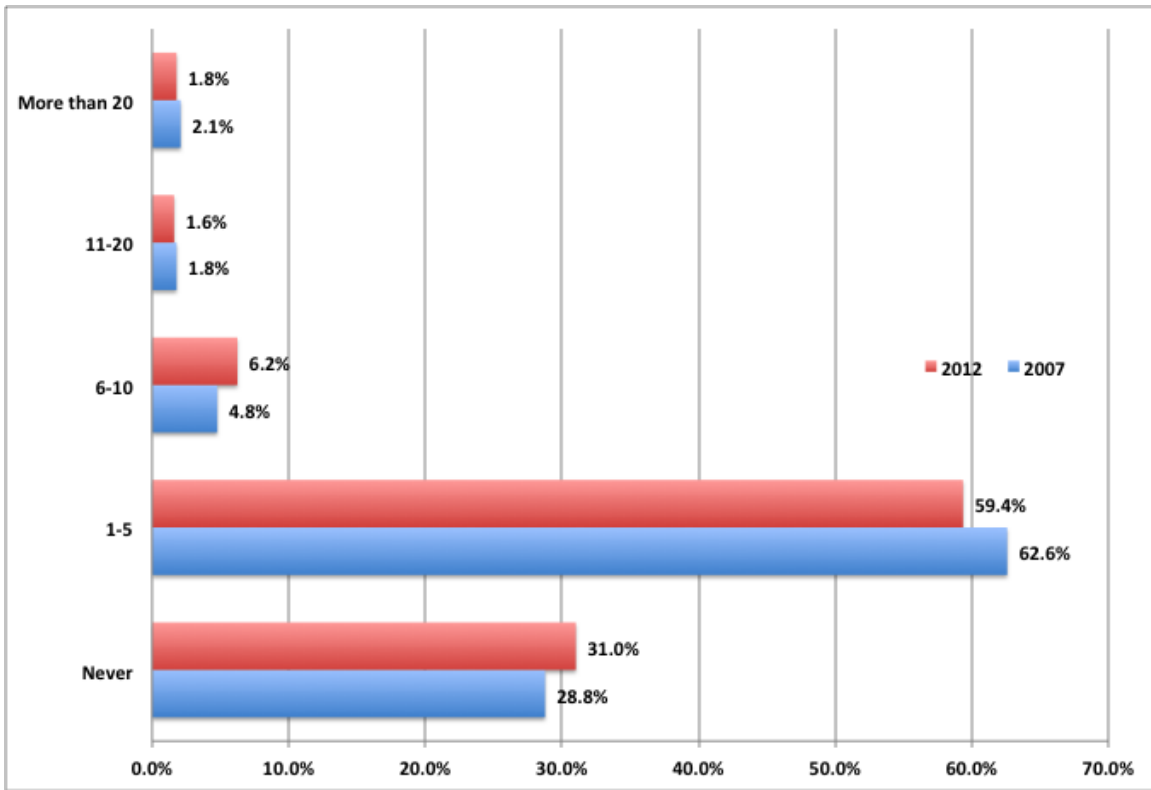
Of particular note, the percentage of members reporting access "at home" has increased from 90.7% in 2007 to 95.1% and the number reporting "No I don't have access to the internet at all" has decreased from 5.0% in 2007 to 2.5%. So there has been a growth in access to the internet across the membership, as would be expected.

2. How many times per month do you use the internet to browse websites?



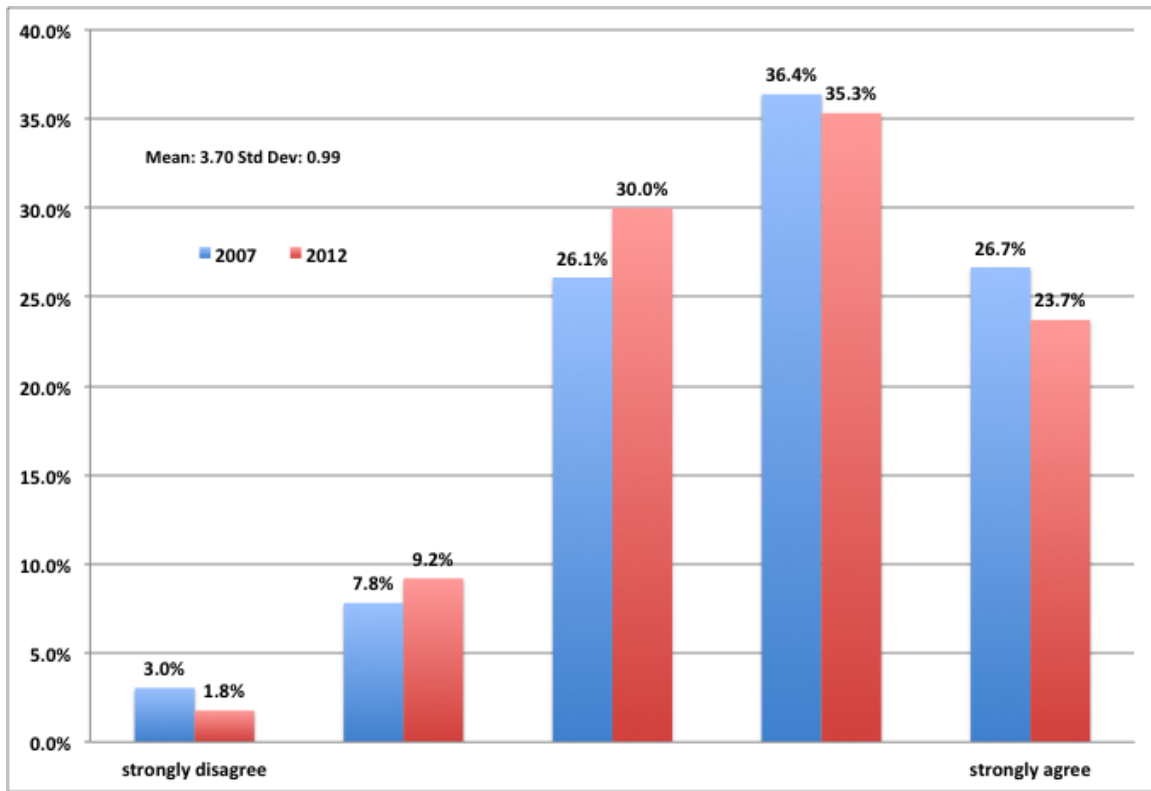
As would be expected with the growth in access to the internet, correspondingly more members use the internet to browse websites. Of note, now 73.4% browse websites now compared to 59.1% in 2007 while only 3.5% never do compared to 6.6% in 2007.

3. How many times per month do you visit the COPA website at www.copanational.org ?



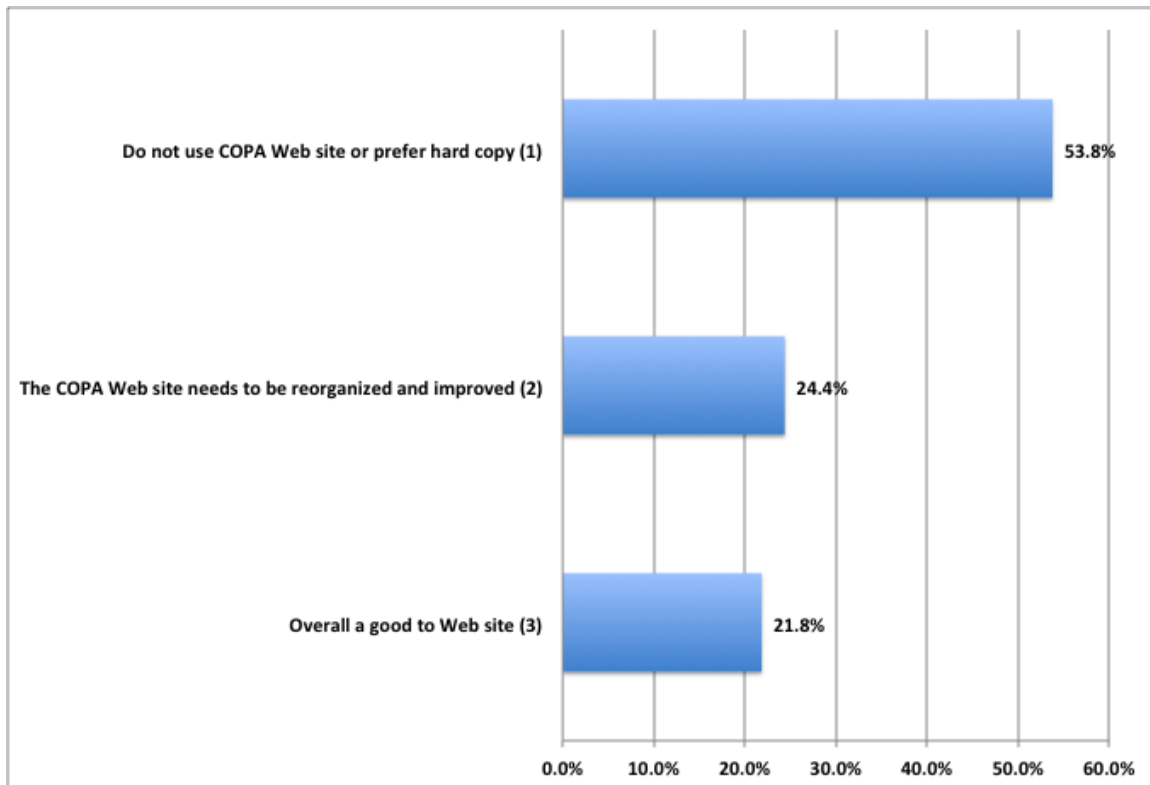
These percentages remain virtually unchanged from the 2002 and 2007 surveys.

4. I find the COPA Web site very useful



This mean is lower than the 4.08 reported in the 2007 survey, though the standard deviation is better (0.99 vs 1.23).

4. a) Comments



1. Do not use COPA Web site or prefer hard copy (64 comments)

Including most did not have access to the Internet or did not like or use computers; many noted that they used only the newspaper.

2. The COPA Web site needs to be reorganized and improved (29 comments)

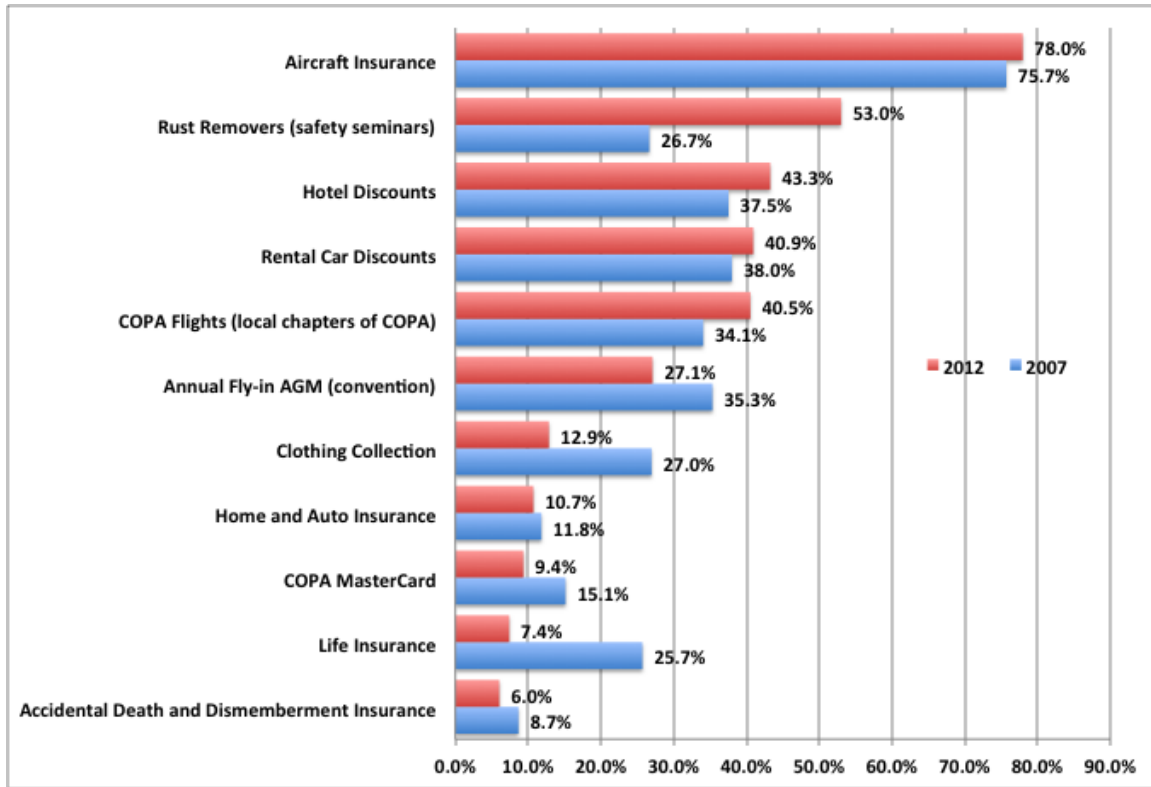
Including be kept more current, provide more links, and provide more content, news, and services; develop a news section which is updated weekly and archive articles that are older; looks better now but still found it hard to navigate; should adapt more material from AOPA, such as safety courses; harder for some members, particularly in the north, to view classified ads now.

3. Overall a good to Web site (26 comments)

Found the site very useful and noted it supports an amazing collection of information; was up-to-date with good links and easy to navigate; used the COPA Web site as a complement to the newspaper; useful to answer specific concerns; reads mainly the classifieds, places to fly and COPA guides.

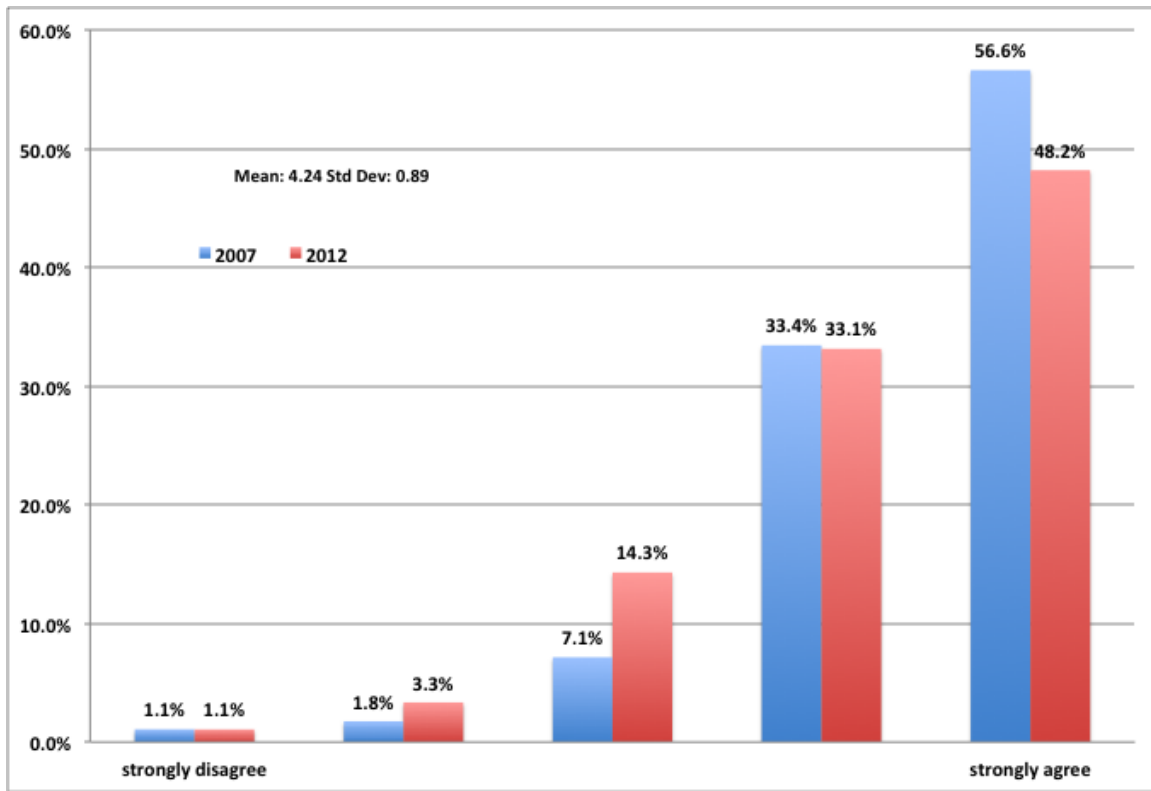
C. Please tell us about COPA Policies and Programs

1. Which of the following COPA membership benefits do you want?



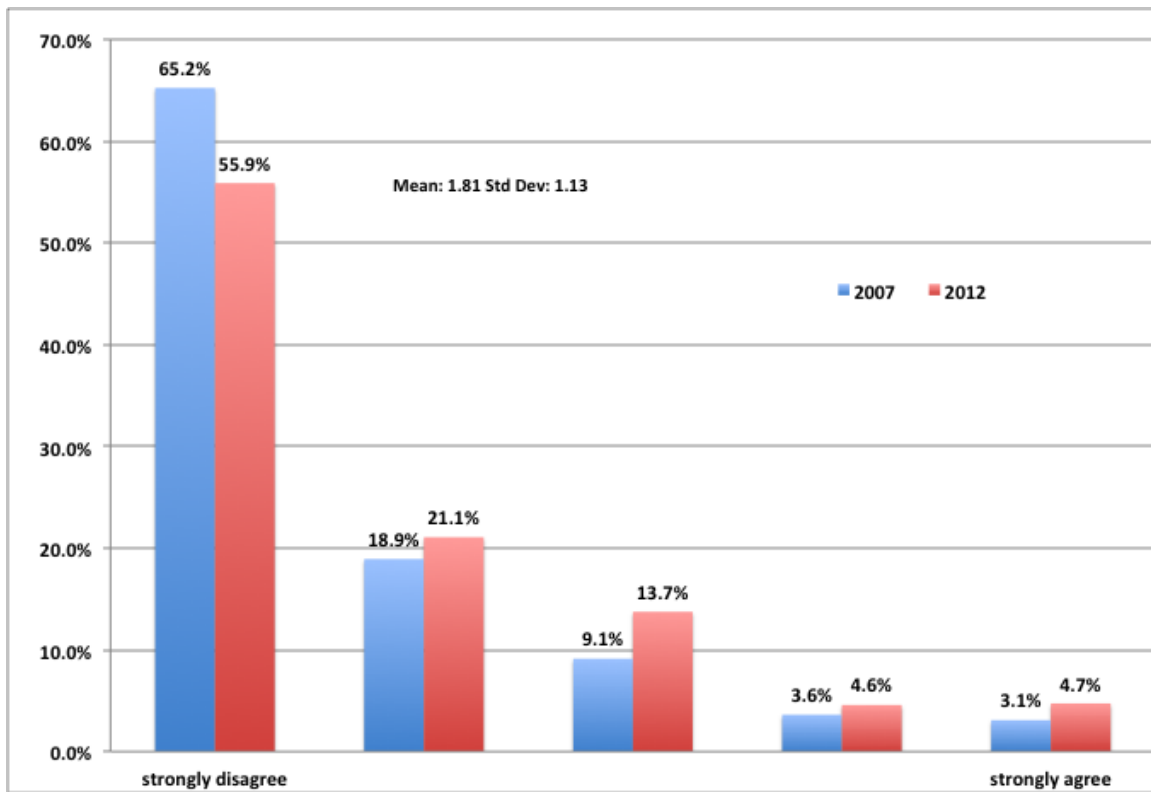
These results are similar to those from the 2007 survey, with "Aircraft Insurance" remaining the most popular and "Accidental Death and Dismemberment Insurance" the least. Interestingly, "Rust Removers (safety seminars)" moved up strongly from fifth place in 2007 to sit at second, and "Annual Fly-in AGM (convention)" moved down from fourth in 2007 to sixth.

2. The monthly COPA newspaper *COPA Flight* is excellent.



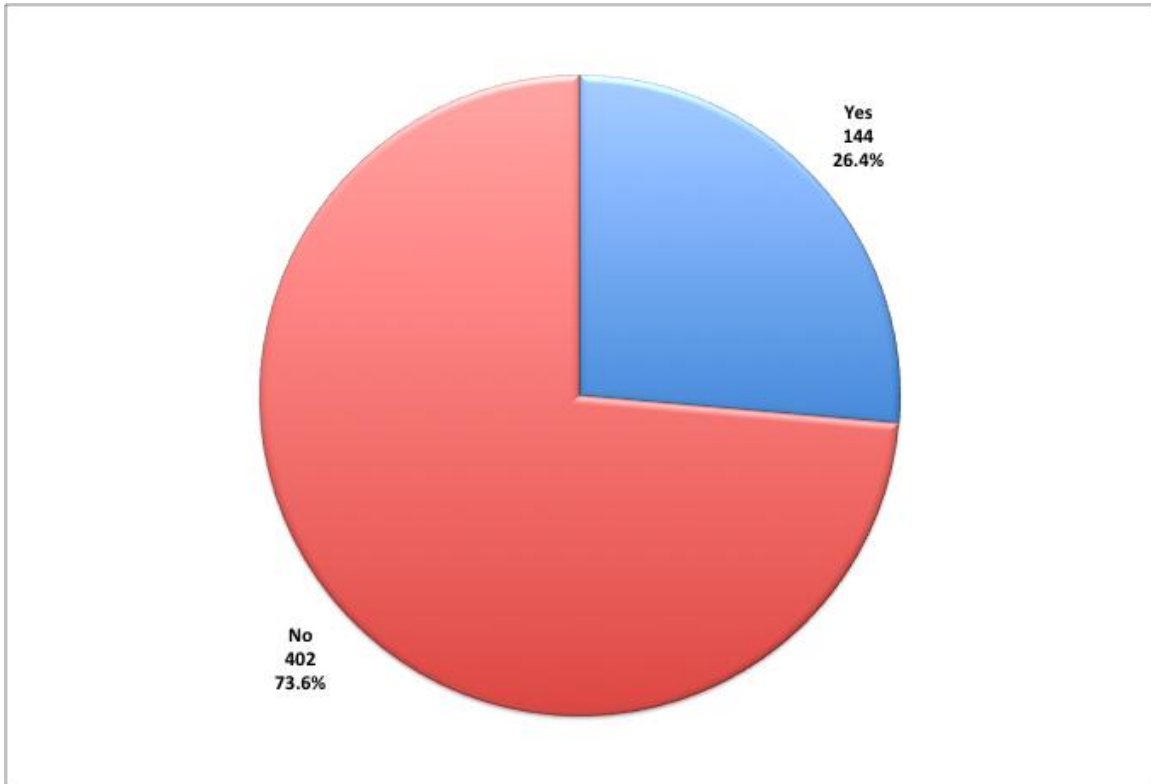
The mean of 4.24 is not as high as the mean of 4.45 reported in the 2007 survey. Nevertheless, both these means are high indeed and indicate that the majority of the COPA membership believes that the *COPA Flight* newspaper is excellent. In fact, 81.3% (48.2 + 33.1) strongly agree with the above statement.

3. I believe that the COPA newspaper *COPA Flight* should become solely a web-based publication.



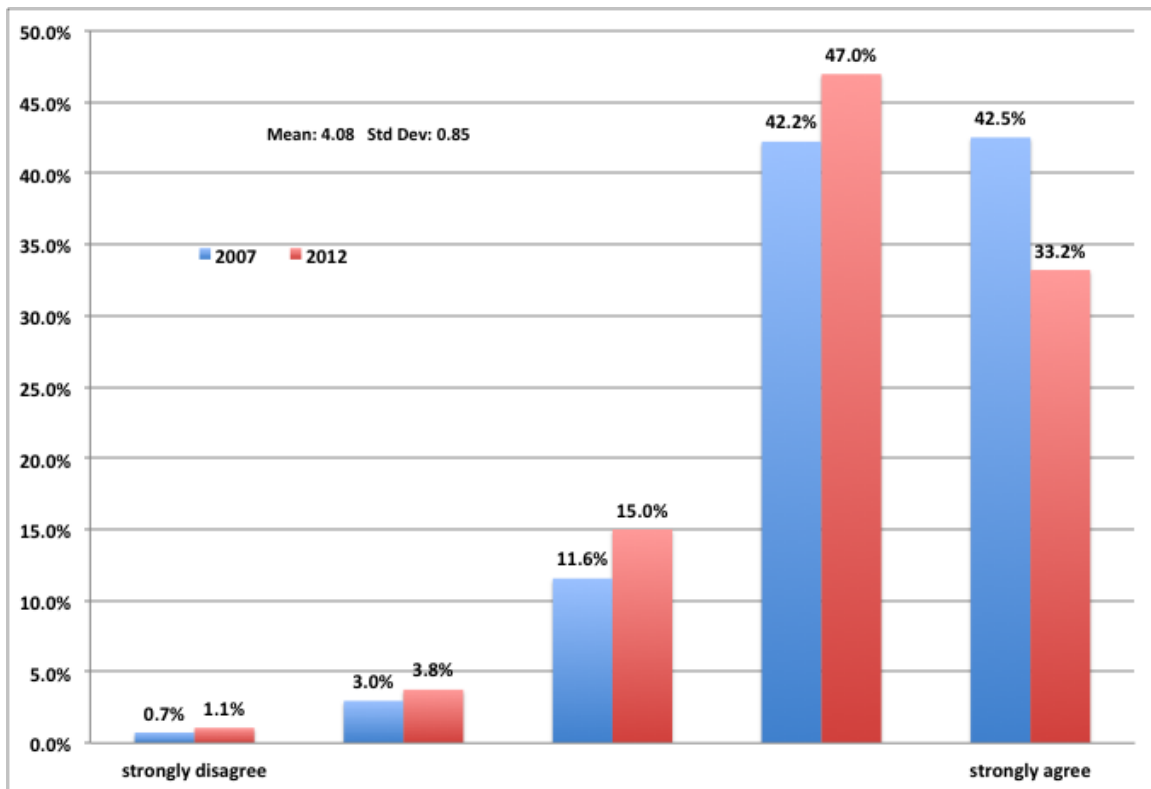
This mean is not as low as the one in the 2007 survey which stood at 1.60, signaling slightly less resistance to this issue; however, it still strongly supports retaining the *COPA Flight* newspaper. Another way to look at this issue is that 77.0% (55.9 + 21.1) would strongly disagree with substituting a web-based publication for this newspaper.

4. If given the option to access *COPA Flight* newspaper as a web-based publication for a small reduction on my membership dues, I would take this option.



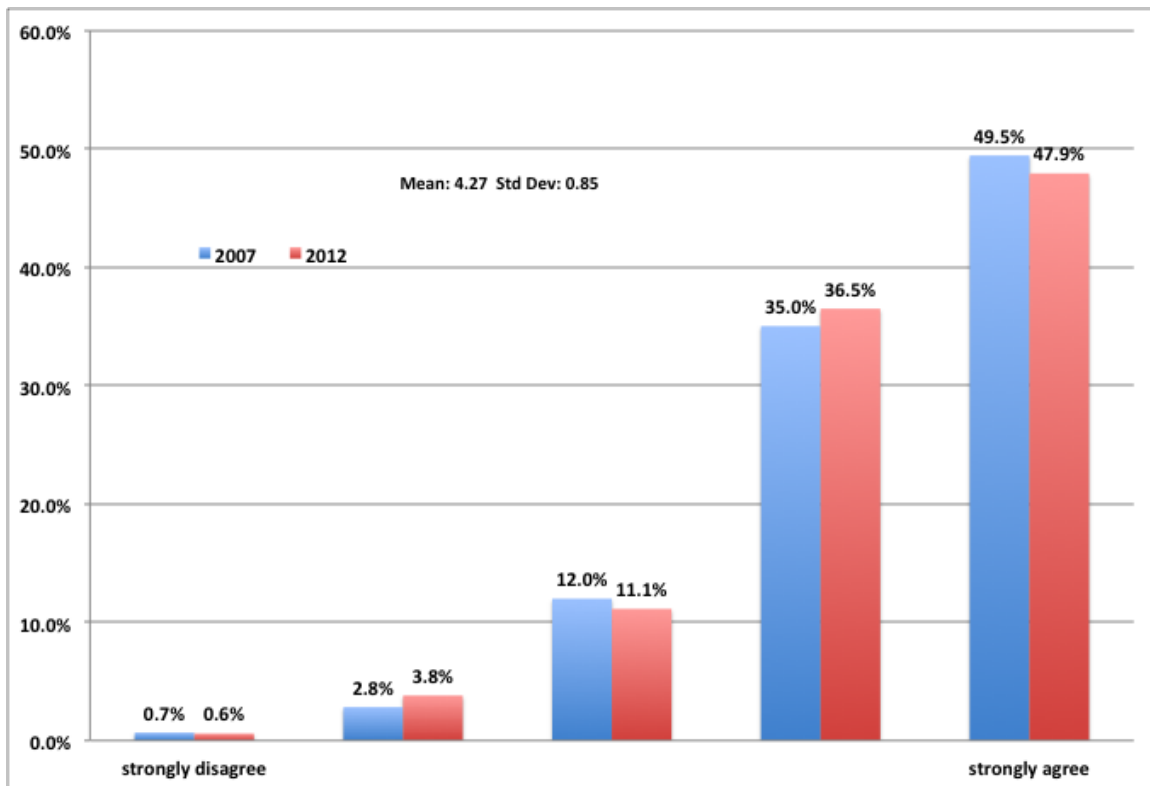
When you offer a small reduction in membership dues, the resistance to a web-based publication instead of the *COPA Flight* newspaper is less.

5. I feel that *COPA Flight* keeps me adequately informed about general aviation events.



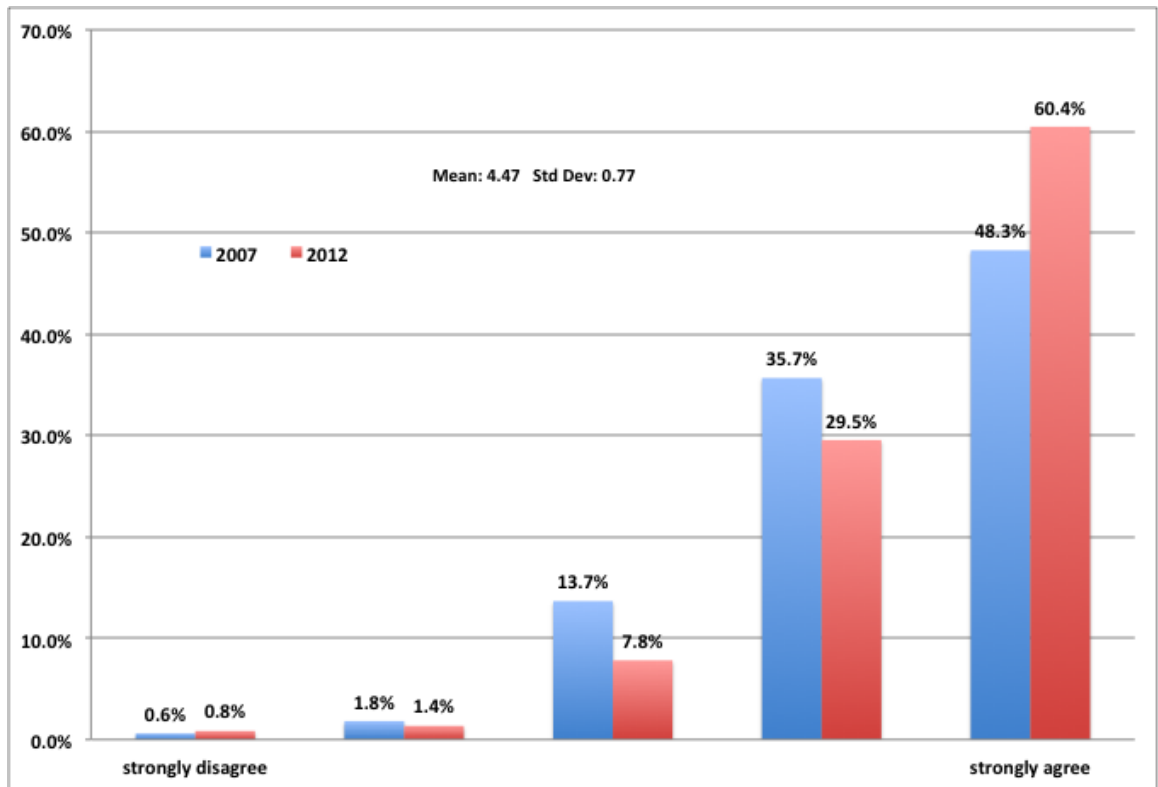
With a standard deviation of 0.85, there is good agreement across the membership on this issue. A mean of 4.08 is a positive confirmation of this statement; however, it is poorer than the mean of 4.25 reported in the 2007 survey. It is important, nevertheless, to highlight that 80.2% (33.2 + 47.0) in this 2012 survey strongly support this statement.

6. I feel that I am getting good value from my COPA membership.



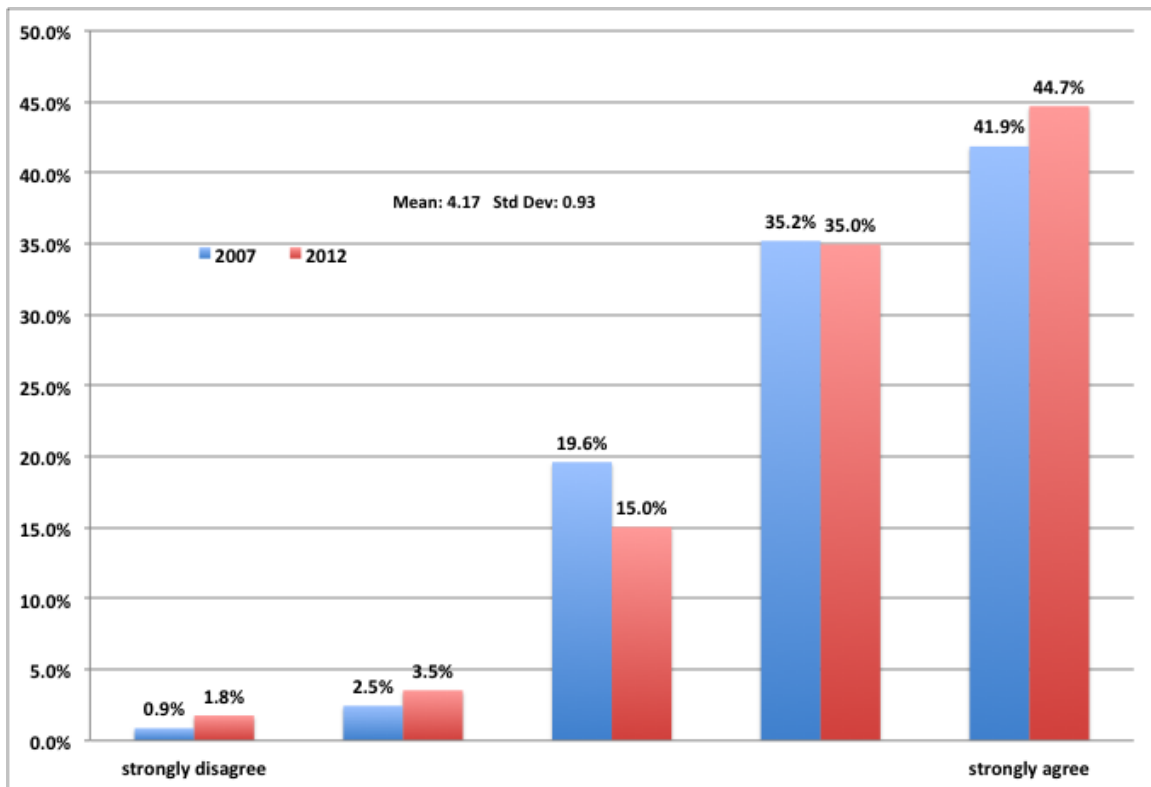
These results are virtually identical to those reported in the 2007 survey (means: 4.27 vs 4.32 and standard deviations: 0.85 vs 0.85). These results reconfirm that survey participants and therefore the membership feel strongly that they are getting good value from their COPA membership. This statement is further corroborated by the fact that 84.4% (47.9 + 36.5) strongly agree with this statement.

7. I find my dealings with COPA staff to be a positive experience.



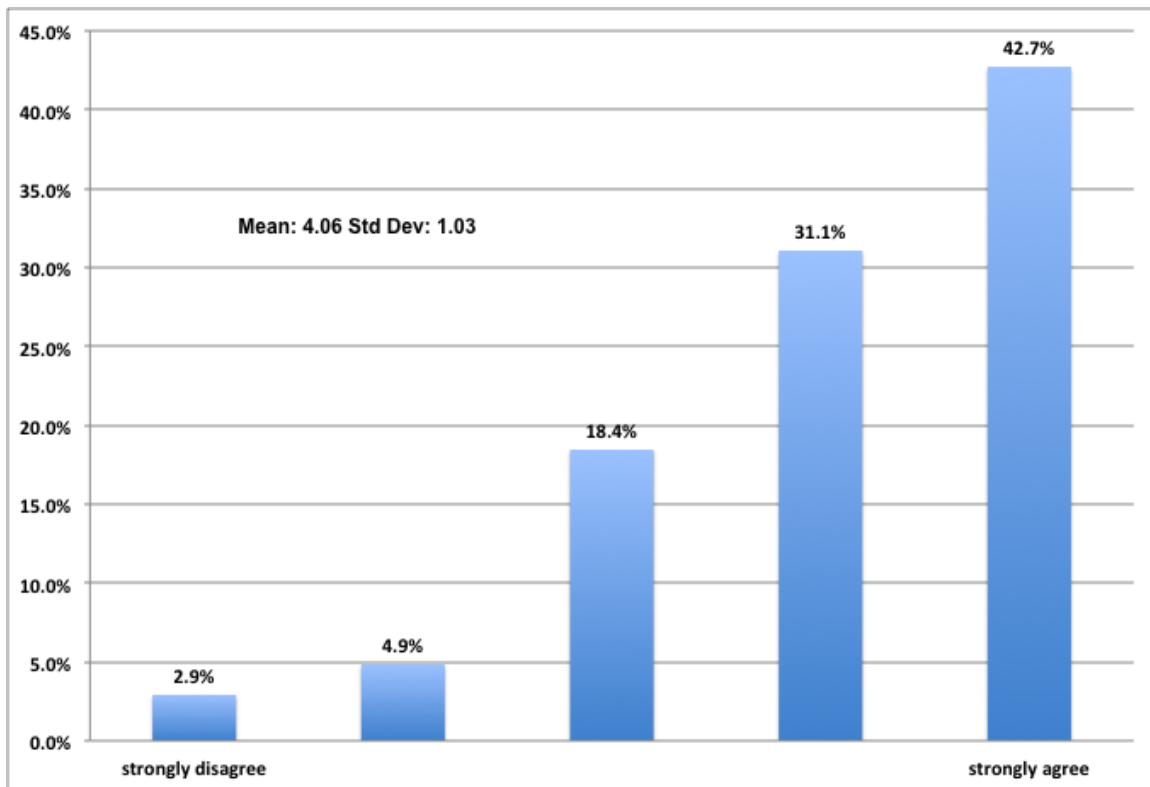
This mean was even better than the one in the 2007 survey (4.47 vs 4.36), indicating again very strong support for this statement. Also, it is worth noting that 89.9% (60.4 + 29.5) of the survey participants strongly agree with this statement.

8. I find that I get my questions answered by COPA staff in a timely manner.



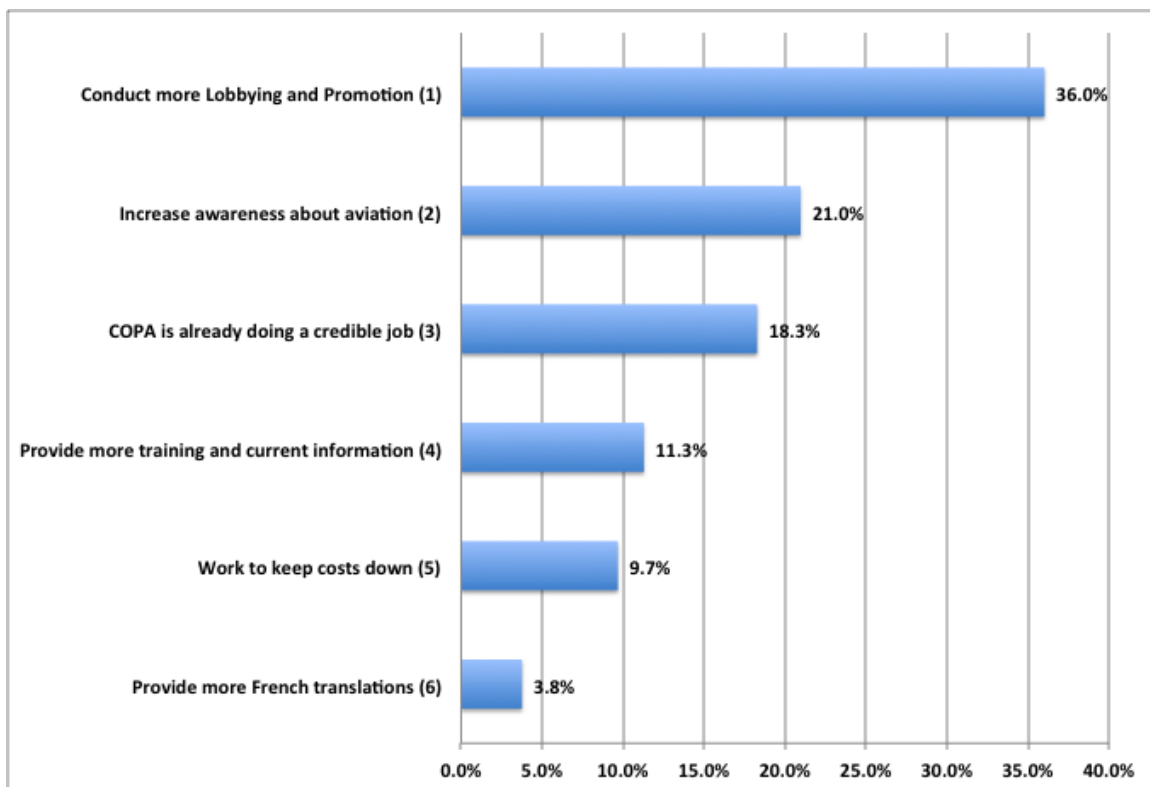
With 79.7% (44.7 + 35.0) of the survey participants strongly agreeing with this statement and with a mean of 4.17 and a standard deviation of 0.93, the majority of survey participants feel they get their questions answered by COPA staff in a timely manner. These results are consistent with the data reported in the 2007 survey: means (4.17 vs 4.27) and standard deviations (0.93 vs 0.96)

9. I find my dealings with the members of the COPA board of directors to be a positive experience.



With 73.8% (42.7 + 31.1) of the survey participants strongly agreeing with this statement and with a mean of 4.06 and a standard deviation of 1.03, the majority of survey participants find their dealings with members of the COPA board of directors to be a positive experience.

10. What two things should COPA be doing for personal aviation in Canada that it isn't doing now?



1. Conduct more Lobbying and Promotion (67 comments)

including being seen for strongly supporting aviation across Canada by, for example, lobbying to reduce over-regulation of aviation, lobbying to protect airports, particularly the small ones, and working more closely with Transport Canada and Nav Canada to support members' freedom to fly; expanding COPA's local events; promoting the idea that flying is not only for the rich but is also a hobby accessible to many; lobbying against wind turbines which are built too close to airports.

2. Increase awareness about aviation (39 comments)

including to the media and the general public by providing more education programs and information; by creating more awareness about aviation among students; by hosting competitions among young pilots and students to expand their knowledge about aviation; by working to get more middle-aged people interested in flying; by making politicians more aware of the value of aviation to their communities; by providing more exposure for the gliding and soaring activities of air cadets and for the growth of ultralights; by being more visible in Quebec; by publishing more articles about bush pilots' experiences.

3. COPA is already doing a credible job (34 comments)

including by continuing to do what you have always done; by continuing to improve all the time; by doing an excellent job overall; by doing all that I expected.

4. Provide more training and current information (21 comments)

including to promote more aviation training, especially to youth; by providing more hands-on training seminars; by offering more refresher courses; by providing more web-based training; by providing more safety and incidents reports and more timely information on the latest technology advances; by encouraging young pilots to complete their training because many fail to do so; by offering more programs and more training in the North; by working with Nav Canada to develop more digital maps and charts and promoting improved radio communication; by providing information about importing aircraft from the USA.

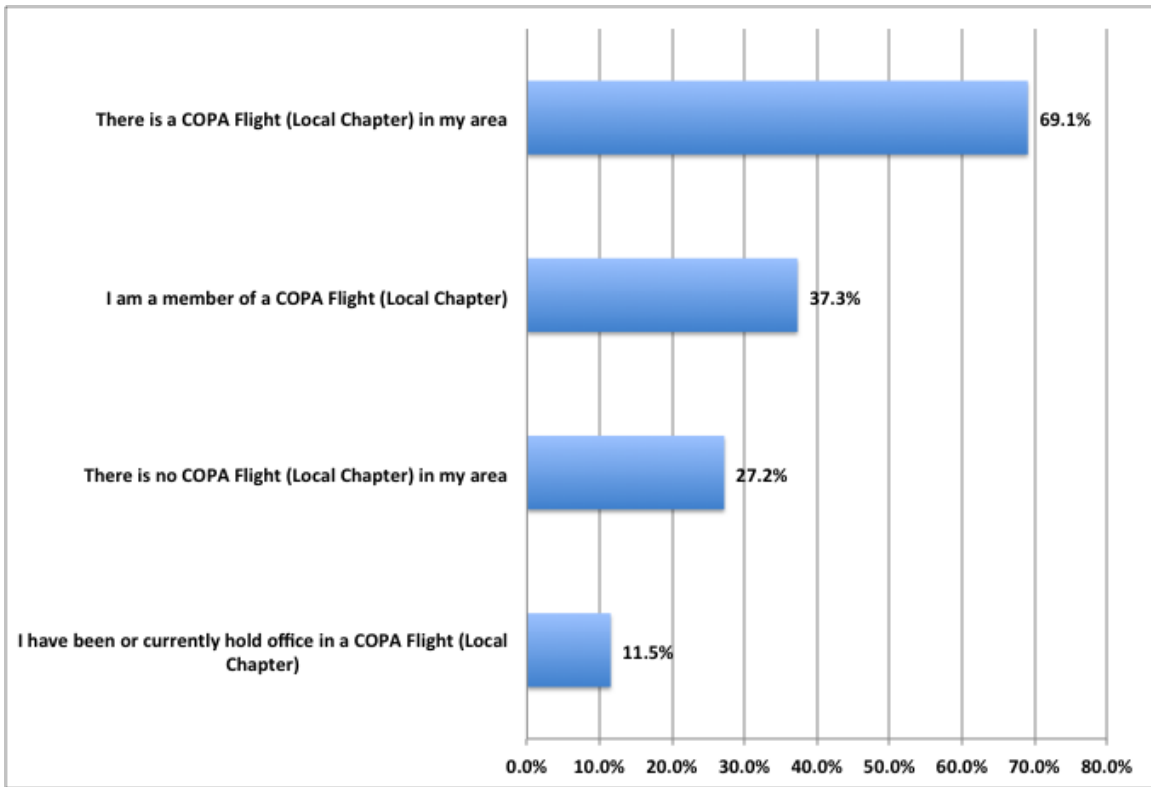
5. Work to keep costs down (18 comments)

including for all aviation insurance, renting aircraft and airspace, buying fuel, paying aviation sales taxes, and providing discounted rates for retirees.

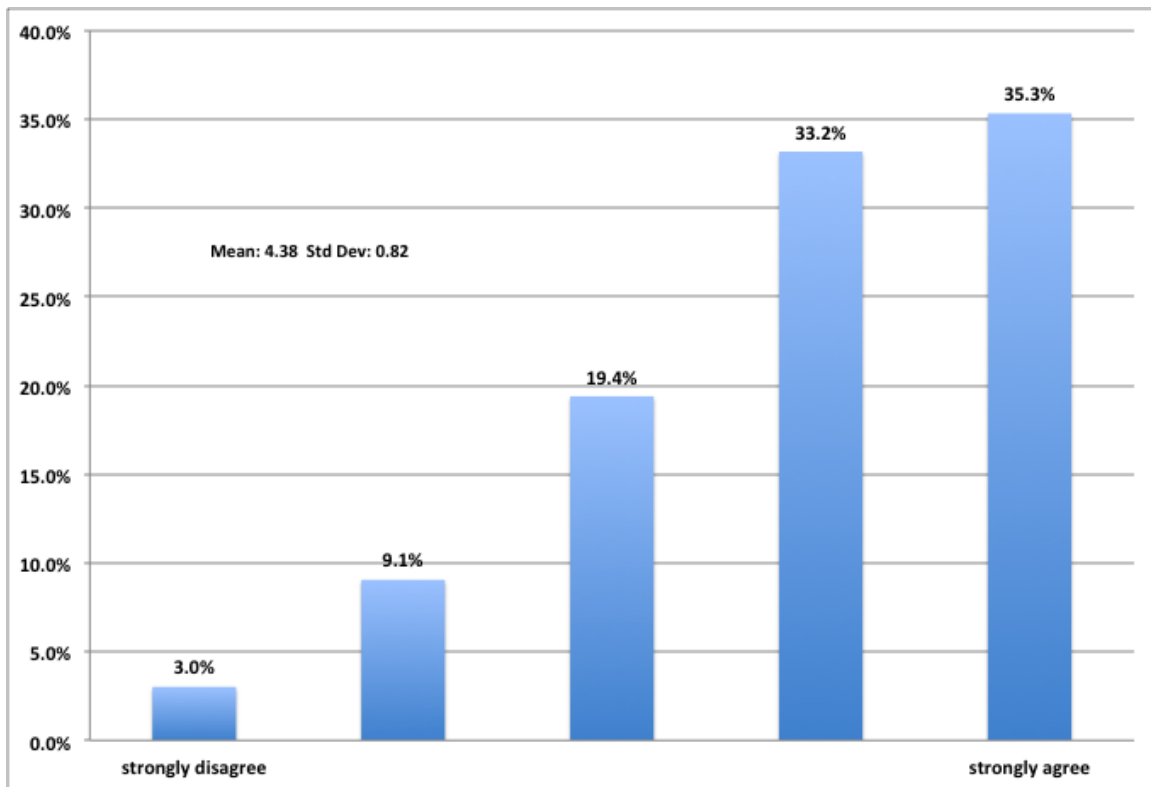
6. Provide more French translations (7 comments)

including for key documents and within *COPA Flight* newspaper.

11. a) COPA Flights (Local Chapters) (Please check all that are applicable):

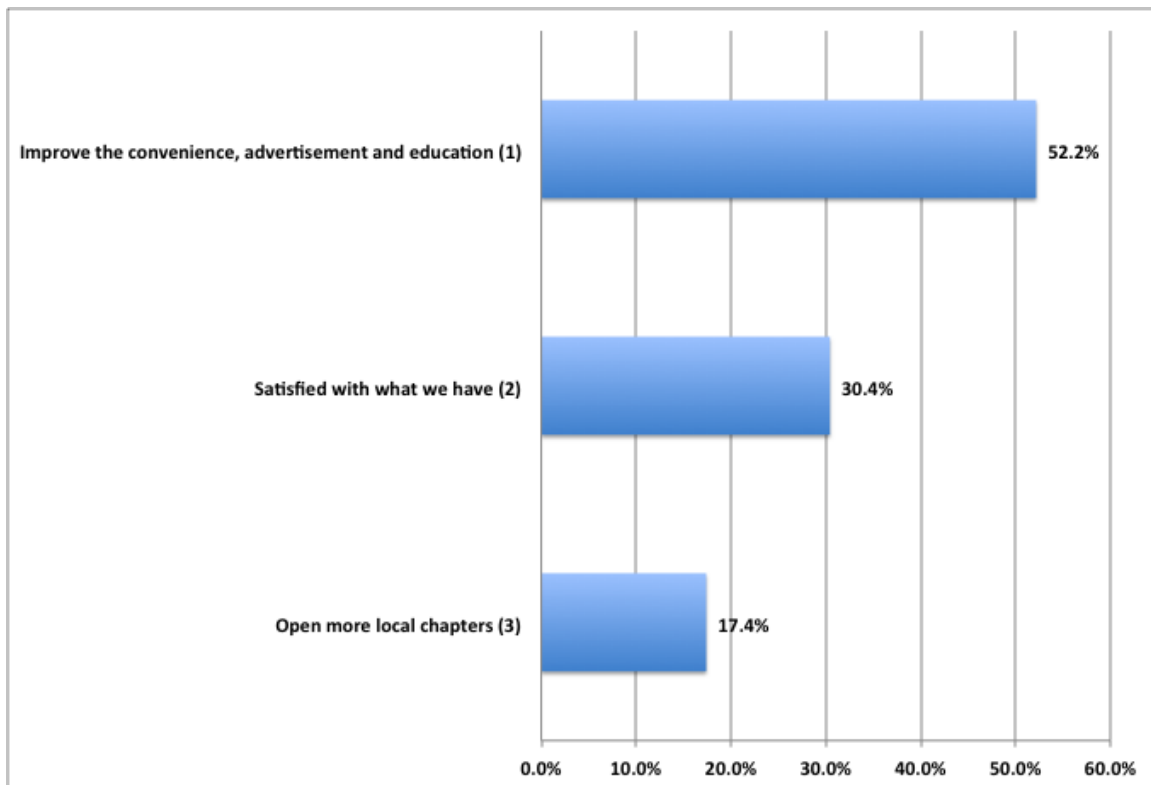


11. b) I am very satisfied with the services I receive from my COPA Flight (Local Chapter).



With 68.5% (35.3 + 33.2) of the survey participants strongly agreeing with this statement and a mean of 3.89 and a standard deviation of 1.08, a majority of survey participants are very satisfied with the services they receive from their COPA Flight (Local Chapter). This data, however, does indicate that there is definitely room for improvement here.

11. c) What two things could be done to improve the services I receive from my COPA Flight (Local Chapter)?



1. Improve the convenience, advertisement and education (24 comments)

including providing more notice of meetings and hosting them at more convenient times; by being more visible and holding more meetings; by providing better advertising within the respective regions because presently communication is poor; by COPA National supporting better communication among local chapters through the Website; by COPA national providing more support, including sponsoring periodic visits by appropriate COPA staff; by sharing knowledge and videos among chapters; by making it easier for non-pilots to attend and be part of the activities; by hosting more events that involve the whole family.

2. Satisfied with what we have (14 comments)

including I am pleased with it as it is; I am perfectly satisfied--all is good; we are a small group and do a lot considering the number of volunteers we have; COPA National has been most helpful.

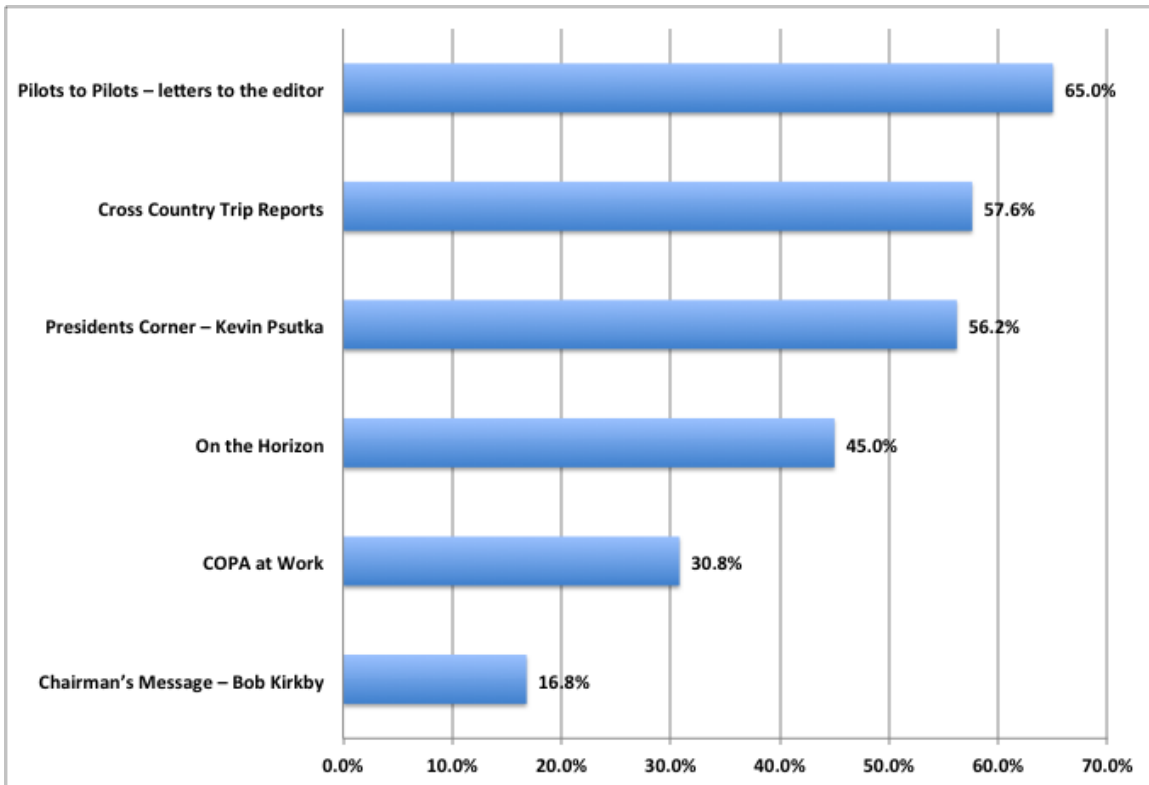
3. Open more local chapters (8 comments)

including starting new ones where possible, for example, in the Squamish, Montreal and Toronto areas; by soliciting more members who would like to start a local chapter in their respective regions.

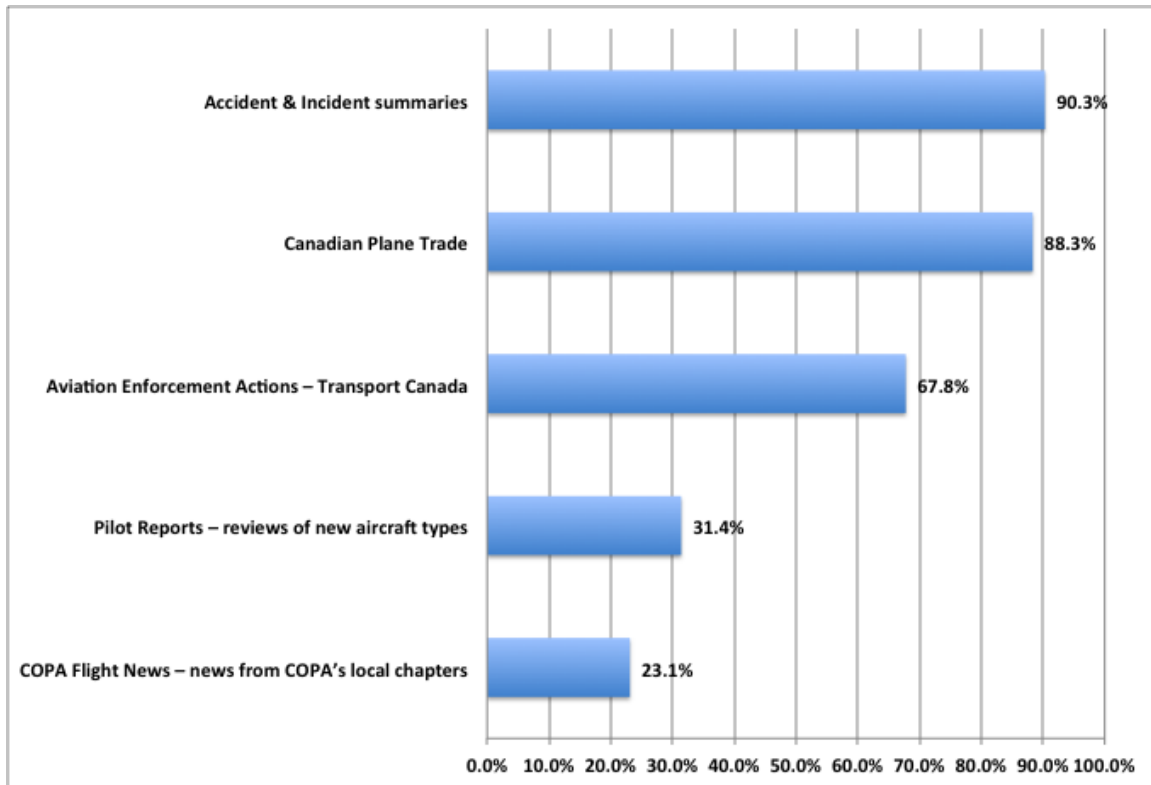
D. Please tell us what you like in the *COPA Flight* newspaper.

1. Please check only three (3) that you read regularly in each of the four sections below:

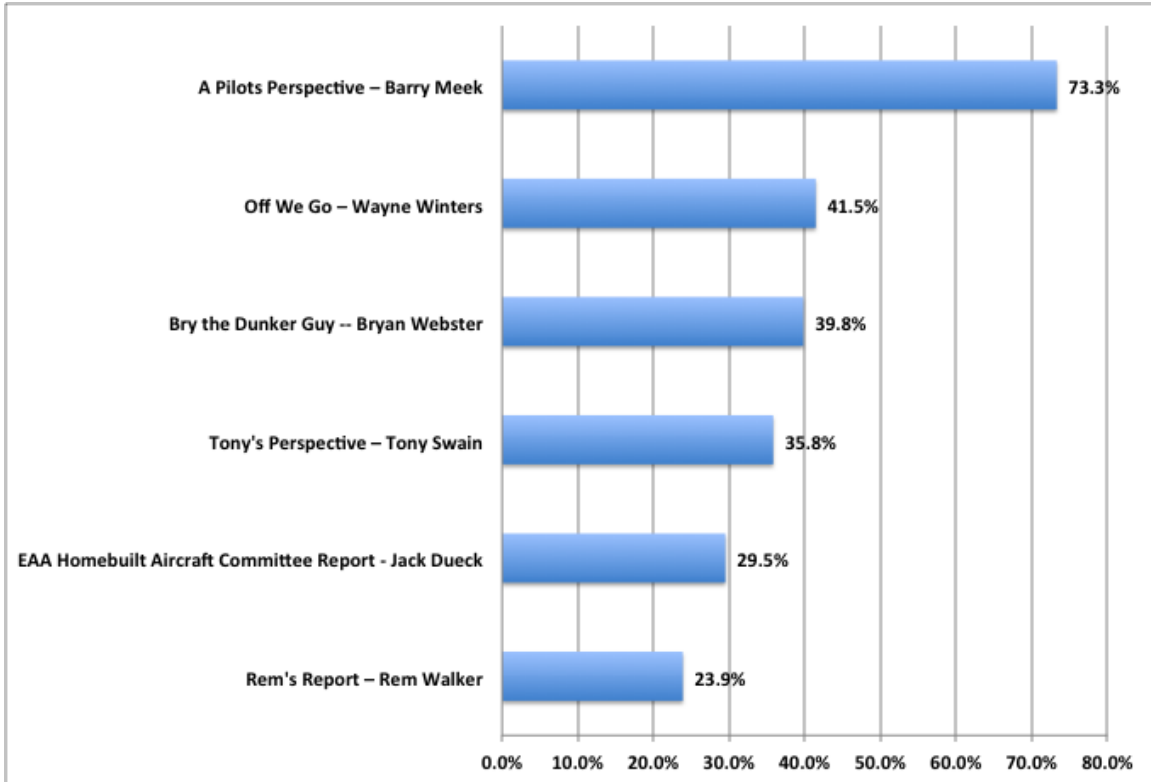
Section One



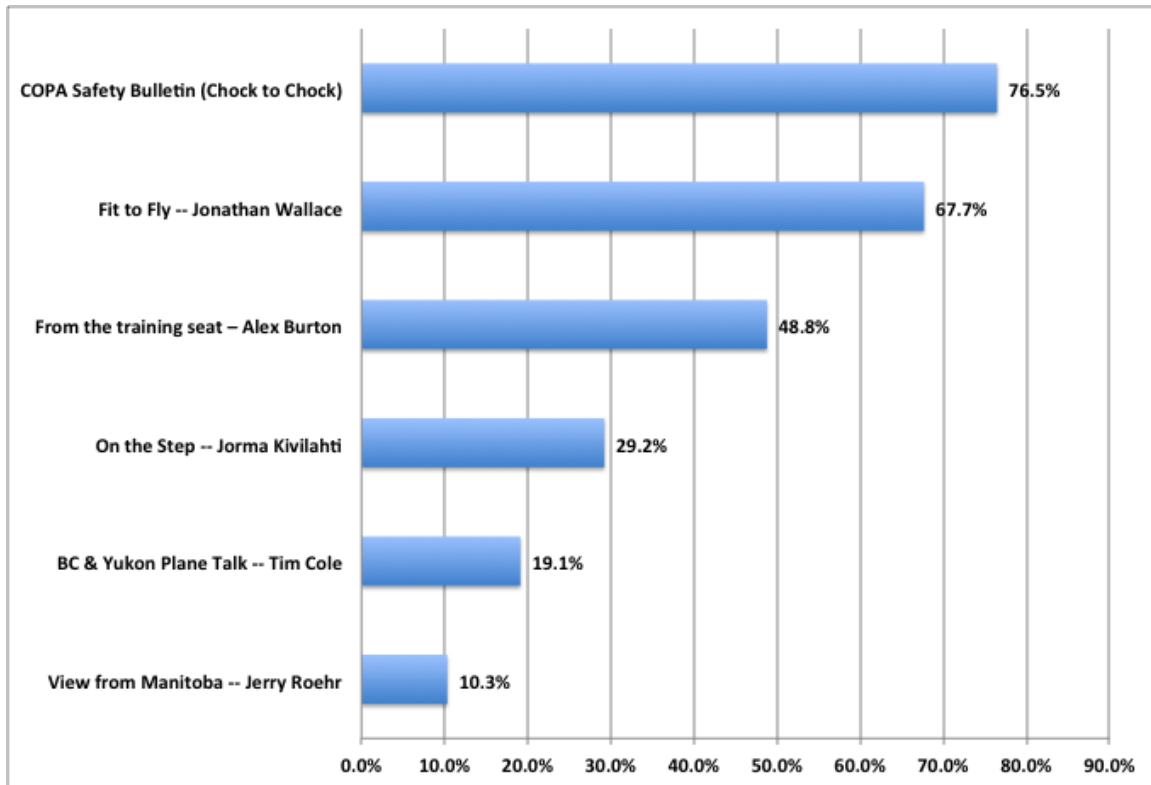
Section Two



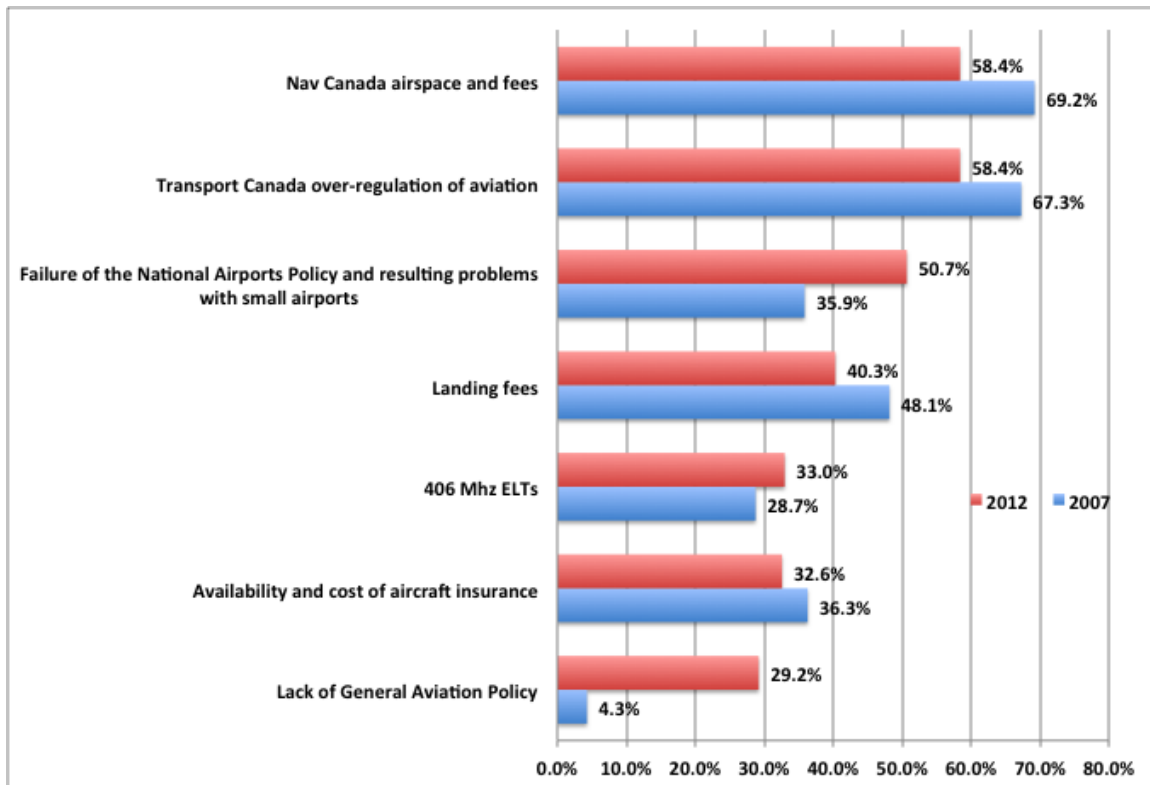
Section Three



Section Four



E. Please tell us how you feel about issues that affect personal aviation.



Though the categories used for this question vary somewhat from those in the 2007 survey, nevertheless the rankings of the two top items remain the same (Nav Canada airspace and fees and Transport Canada over-regulation of aviation).

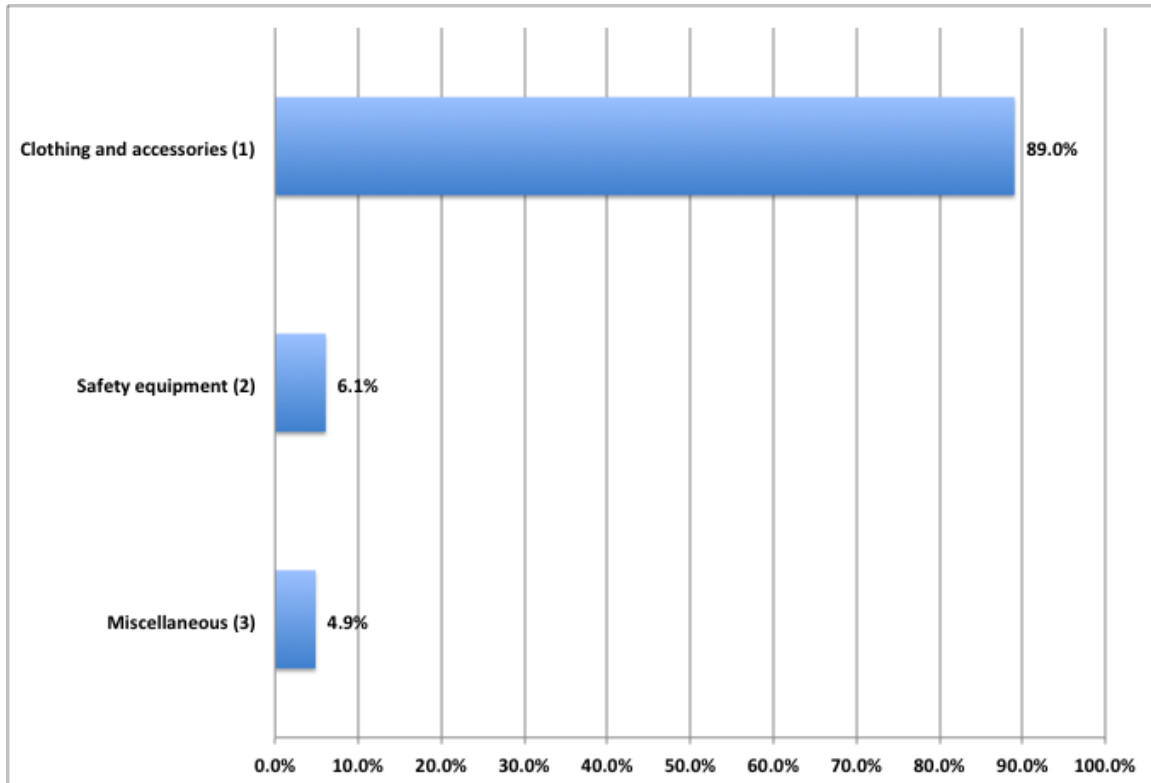
F. Please provide your perspective on the services COPA provides

1. Please rank the following nine (9) services that COPA provides to its members.

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|--|-----|-----|----|----|----|----|----|----|-----|
| "COPA Flight" newspaper | 201 | 112 | 71 | 27 | 19 | 21 | 12 | 16 | 19 |
| COPA lobbying efforts with government | 173 | 114 | 94 | 41 | 22 | 19 | 12 | 13 | 16 |
| COPA aviation insurance | 88 | 108 | 72 | 47 | 41 | 20 | 29 | 42 | 35 |
| COPA Website | 19 | 48 | 69 | 85 | 84 | 47 | 51 | 43 | 18 |
| COPA Guides | 14 | 34 | 47 | 81 | 83 | 84 | 51 | 44 | 30 |
| COPA staff to answer questions by phone and e-mail | 14 | 22 | 47 | 63 | 64 | 86 | 68 | 48 | 44 |
| COPA for Kids | 12 | 27 | 43 | 49 | 58 | 51 | 71 | 61 | 83 |
| Annual Fly-in AGM (convention) | 11 | 17 | 20 | 48 | 60 | 58 | 76 | 90 | 70 |
| COPA Flight digital newspaper | 20 | 16 | 22 | 33 | 42 | 49 | 55 | 80 | 145 |

These results were similar to those in the 2007 survey. The difference is that the three top choices changed places, with the "COPA Flight" newspaper moving to first where it was second in the 2007 survey and "COPA aviation insurance" dropping to third from first in 2007. While "COPA lobbying efforts with government" are second, they were third in the 2007 survey. Regardless of placement, these three services continue by far to be regarded by the membership as the three most important services COPA offers. Interestingly, the COPA website has moved up to the fourth most important service.

2. The one item that I would like to see offered for sale as part of the COPA collection of clothing and other merchandise is:



1. Clothing and accessories (73 comments)

including good quality jackets for summer and winter and bomber jackets; coveralls/flight suits and shirts, T-shirts, Tilley-style hats, vests with many pockets, sunglasses, sun visors, pullovers, work aprons; leather items, including jackets, wallets and gloves; more vintage and retro apparel; polo shirts, tank tops and key chains for woman; hats without the hard knob on the top; a distinctive COPA pilot ring, crests and wings; zip-up sweatshirts, watches and pilot license holders; shirts and hats for children.

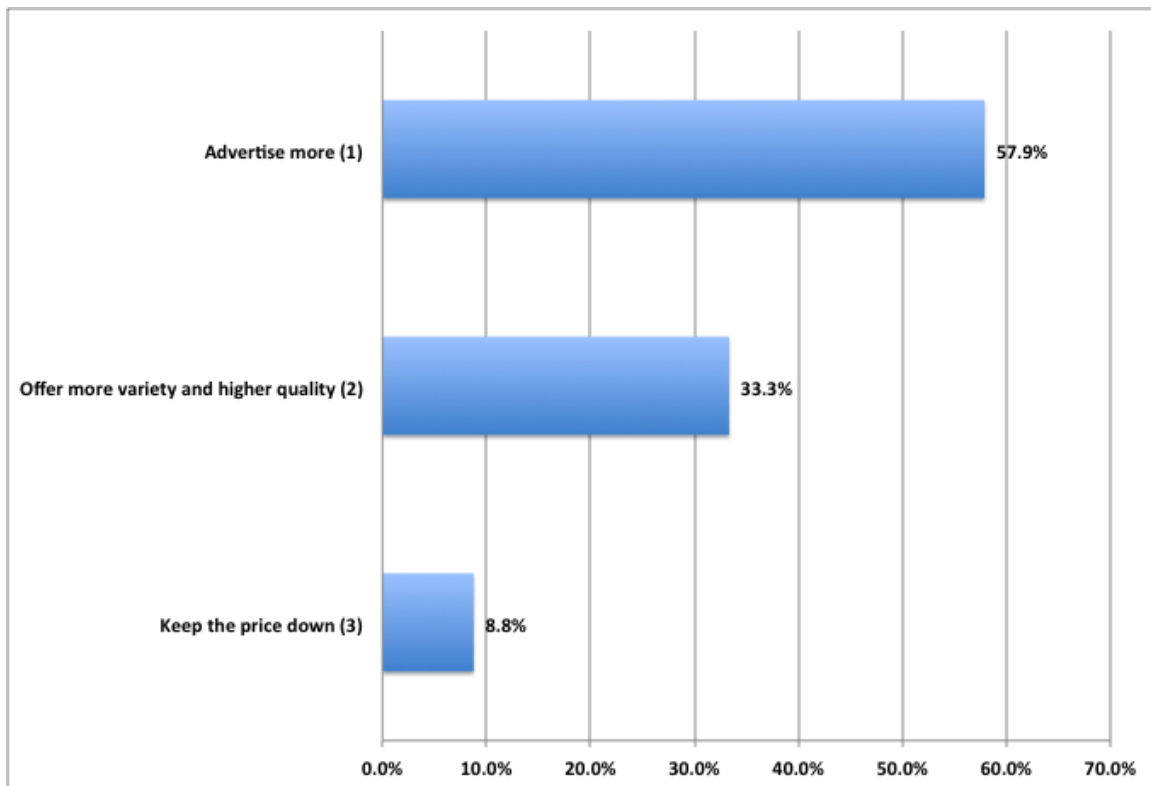
2. Safety equipment (5 comments)

including flights vests, survival kits, fireproof flight suits, compact survival gear and GPS chart applications.

3. Miscellaneous (4 comments)

including maps/flags, COPA laptop cases and iPad accessories.

3. What two things could COPA National do to better promote its collection of clothing and other merchandise?



1. Advertise more (66 comments)

including on the COPA Website, with better links to the apparel; at fly-ins, seminars, such as, rust removers, and flying schools; in various newspaper; with more displays at appropriate locations; with more giveaways, for example, with renewals; with the option of customizing various apparel, for example, with favourite aircraft pictures; with using better models to display the various apparel; with more pamphlet-sized catalogues; with many more smaller ads and more specials; with monthly promotions; by hosting a photo contest for the member who best displays various apparel.

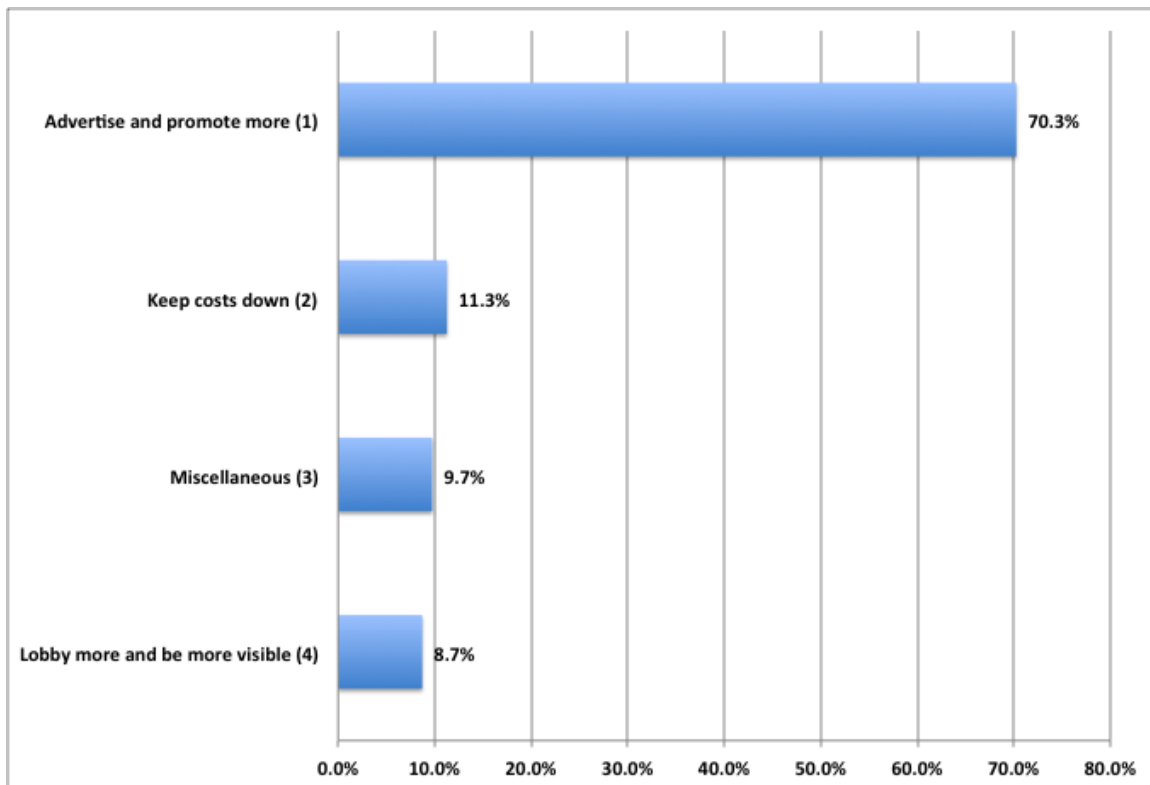
2. Offer more variety and higher quality (38 comments)

including offering vintage clothing including flight helmets, gloves and flight suits; making the clothes more hip and exciting; offering better designs with more colour options; providing more winter clothing and emergency equipment, such as, ELTs and dry fit products; use smaller logos that are less tacky; offering more fashionable and better quality women's wear; offering sizing that fits larger members (xxx); keeping more stock on hand.

3. Keep the price down (10 comments)

including providing more reasonable prices, offering more inexpensive items, and providing discount offers, for example, with yearly renewals.

4. What two strategies should COPA National pursue to increase its membership?



1. Advertise and promote more (137 comments)

including attracting youth by targeting new and student pilots particularly by offering them discounts on joining, such as, a one-time free membership with their purchase of aircraft insurance; by collaborating more with flying schools and promoting the benefits of membership at flying and training centres; by developing programs to encourage students in high school and university to consider flying as a hobby; by appealing to youth through social media; by targeting mid-aged people as potential members; by sending advertising materials to all registered aircraft owners; by placing complementary copies of *COPA Flight* newspaper in strategic places; by being more visible in Quebec; by promoting the benefits of aircraft insurance; by advertising outside the typical market areas, for example, in engineering and physician magazines, in outdoor magazines and in northern areas; by supporting local chapter more by, for example, helping to attract speakers; by advertising COPA events in the local media and inviting the public to attend; by COPA adapting the more successful AOPA programs.

2. Keep costs down (22 comments)

including improving insurance rates; getting rid of Nav Canada fees or lobby to do so; encouraging Transport Canada to provide more affordable electronic maps; making accessibility to flying less costly and restrictive; offering lower fees, especially for new members.

3. Miscellaneous (19 comments)

including providing more publications in French and in the newspaper, and more space for French-language reviews; keeping more up-to-date, for example, on the Website; providing better customer service; supporting the development of flying schools in rural areas; providing better services for pilots flying in mountain areas; keeping COPA for kids.

4. Lobby more and be more visible (17 comments)

including putting forward and publicizing well-reasoned positions to government on issues of short and long-term relevance to aviation, for example, to keep expenses under control; striving to maintain COPA's position as the independent and go-to voice of informed commentary on aviation issues.

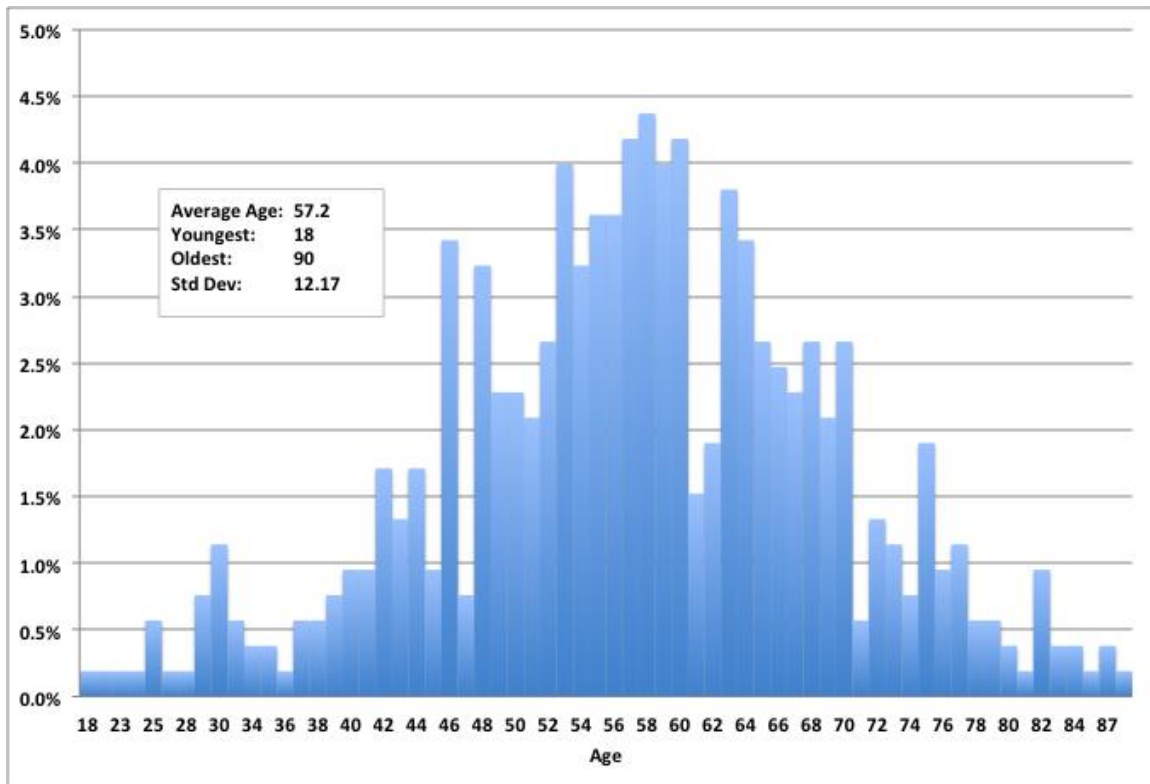
G. Please tell us about yourself (this information helps ensure that we are aware of the needs of all our members)

Home Province

| Home province | Survey | Membership | Variance |
|----------------------|--------|------------|----------|
| Alberta | 16.89% | 14.09% | 2.80% |
| British Columbia | 16.14% | 16.26% | -0.13% |
| Manitoba | 5.44% | 4.27% | 1.17% |
| New Brunswick | 2.44% | 1.57% | 0.87% |
| Newfoundland | 1.50% | 0.83% | 0.67% |
| Northwest Territory | 0.19% | 0.47% | -0.28% |
| Nova Scotia | 3.19% | 1.70% | 1.49% |
| Nunavut | 0.19% | 0.07% | 0.12% |
| Ontario | 34.71% | 37.54% | -2.83% |
| Prince Edward Island | 0.75% | 0.28% | 0.47% |
| Quebec | 12.76% | 17.87% | -5.11% |
| Saskatchewan | 4.13% | 4.32% | -0.19% |
| Yukon | 1.69% | 0.73% | 0.96% |

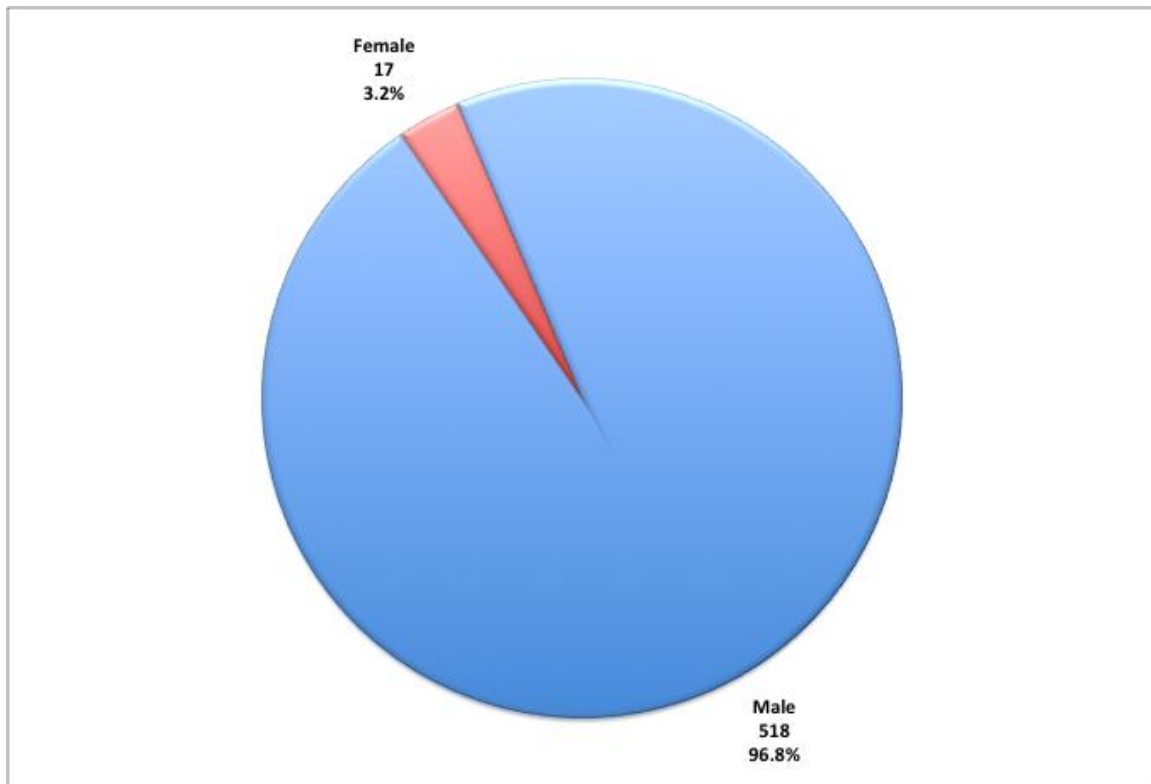
The proportion of survey respondents by province and territory closely matches the proportion of the membership, and all remain well with the margin of error (+/- 3.68) in virtually all cases. Only Quebec shows a response rate outside the margin of error; even so it is a noticeable improvement from the 2007 results (5.11 vs 7.40). This table confirms the representativeness of the survey sample, further supporting the reliability of these survey results.

Age Distribution



These results are comparable to those from the 2002 and 2007 surveys. It is worth noting, however, that the median age at 57.2 is 1.35 years older than the mean age reported in the 2007 survey, which was 55.85. While this growth in mean age is significantly less than reported between the 2002 and 2007 surveys (2.45 years), it still means that there is not enough growth in younger members to sustain the membership size. While much is being tried to attract younger members, more must be done because as time goes by the size of the membership will decline precipitously, especially as the baby boomers start retiring in greater numbers.

Gender Distribution



The ratio of male to female COPA members remains approximately the same as observed in the two previous surveys conducted in 2002 and 2007.

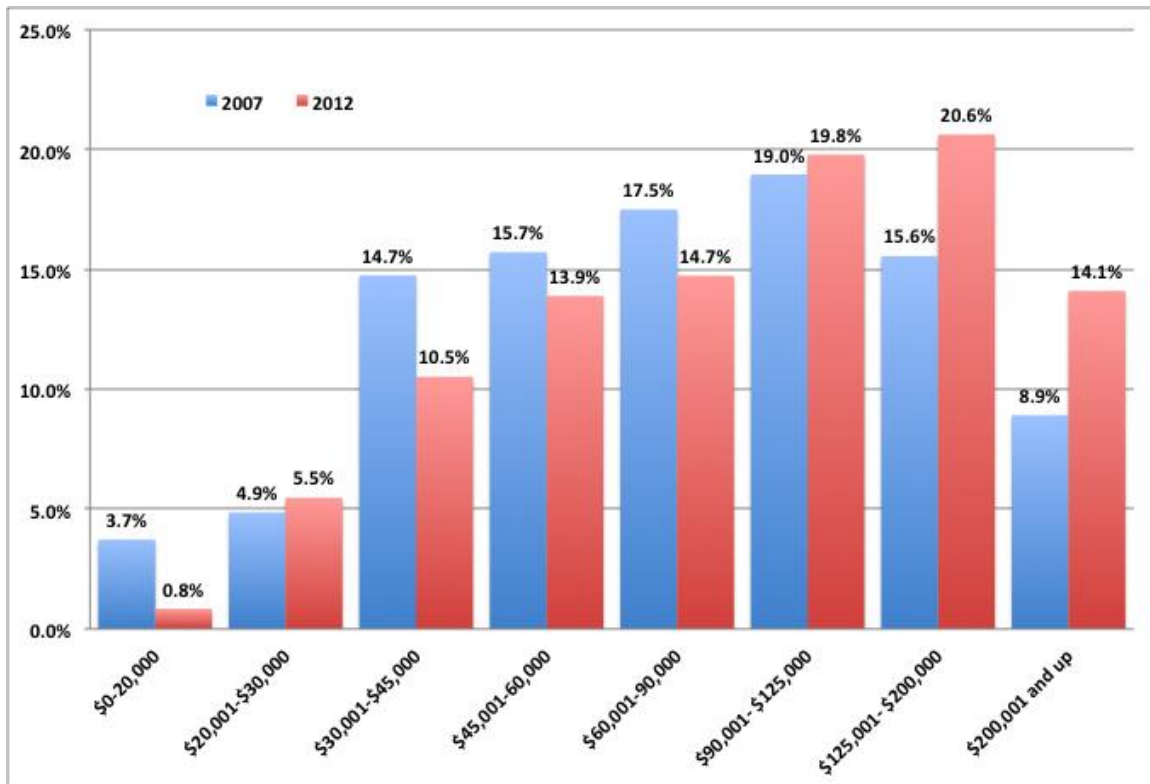
Distribution by Occupation

| Common Occupations Reported | Count | Percent |
|-----------------------------------|-------|---------|
| Engineer/Technician/Technologist | 47 | 14.1% |
| Manager/Executive/Director | 37 | 11.1% |
| Airline/Helicopter/Pilot | 28 | 8.4% |
| Self-employed | 26 | 7.8% |
| Consultant/Contractor | 26 | 7.8% |
| Agriculture/Farmer/Rancher | 19 | 5.7% |
| Business Owner/Entrepreneur | 19 | 5.7% |
| Medical Professionals | 19 | 5.7% |
| Miscellaneous * | 19 | 5.7% |
| Mechanic | 12 | 3.6% |
| Sales/Realtor | 12 | 3.6% |
| Teacher/Professor | 9 | 2.7% |
| AME | 8 | 2.4% |
| Electrician | 7 | 2.1% |
| Construction Worker | 5 | 1.5% |
| Businessman | 4 | 1.2% |
| Financial Professional/Accountant | 4 | 1.2% |
| Police Officer | 4 | 1.2% |
| Energy/Gas Industry | 3 | 0.9% |
| Insurance Broker | 3 | 0.9% |
| Inspector | 3 | 0.9% |
| Mining Industry | 3 | 0.9% |
| Chemist | 2 | 0.6% |
| Clergy | 2 | 0.6% |
| Forester | 2 | 0.6% |
| Geologist | 2 | 0.6% |
| Government Employee | 2 | 0.6% |
| Legal Professional | 2 | 0.6% |
| Student | 2 | 0.6% |
| Truck driver/Driver | 2 | 0.6% |

* The Miscellaneous Category includes the following occupations: architect, athlete, bus operator, cabinet maker, equipment dealer, firefighter, geographer, glazier, graphic designer, inventor, logger, mailman, paper maker, park warden, photographer, politician, scientist, station attendant and warehouseman.

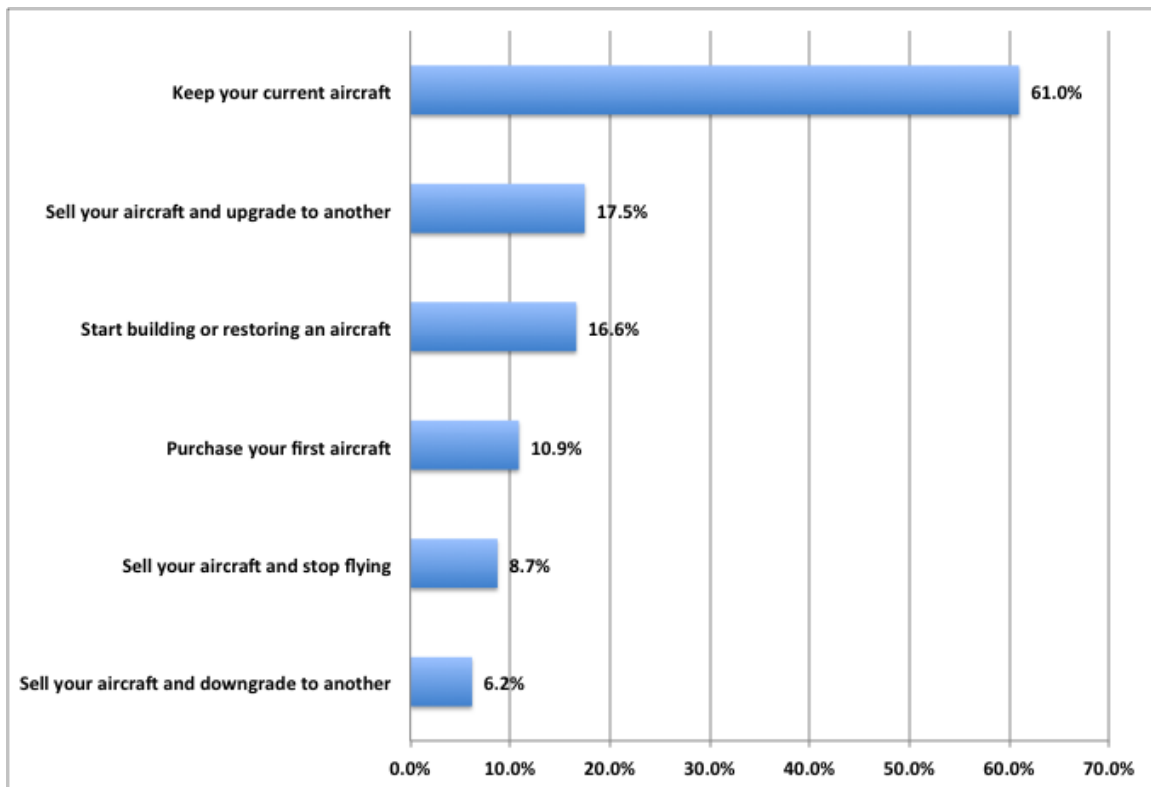
There were markedly fewer members reporting they were retired in 2012 compared to 2007 (72 vs 174) and only one reported he was unemployed compared to 6 in the 2007 survey. What is most noticeable in this distribution chart compared to the one from 2007 is the growth in the number of professionals, particularly medical professionals.

2. Your annual family income is:

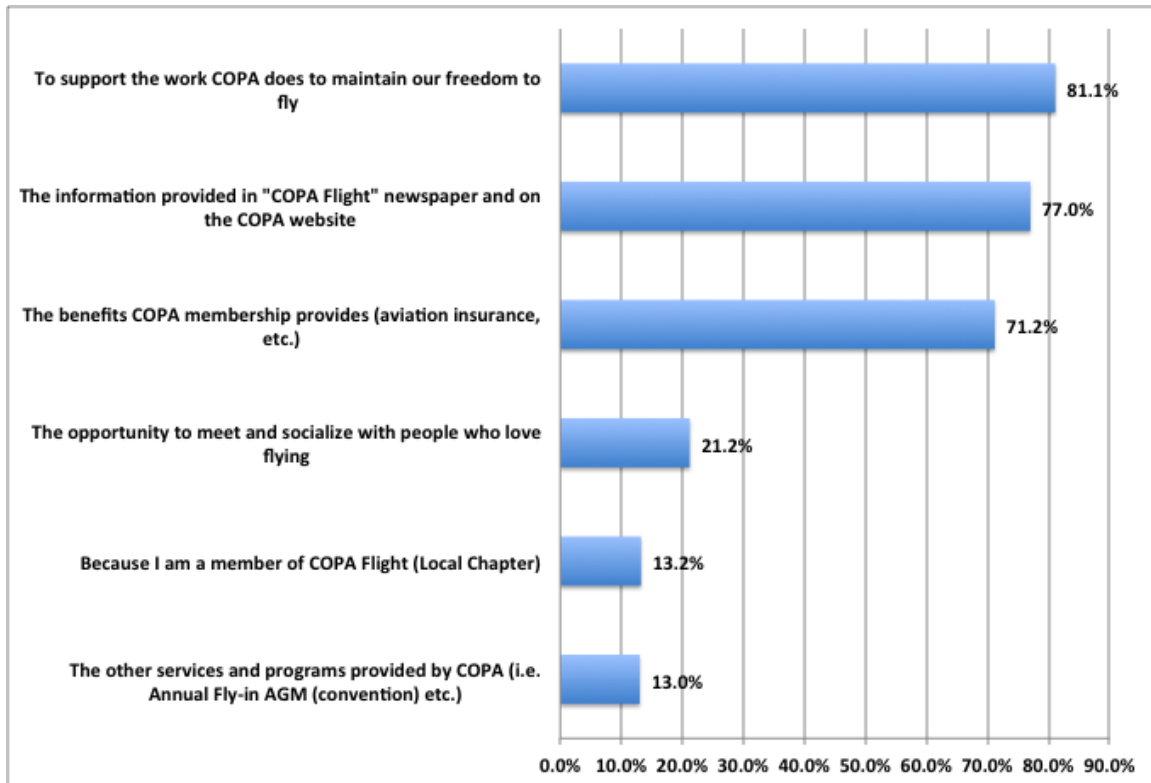


This graph shows that there are fewer members earning between \$0-\$20,000 and more earning between \$200,000 and up than was reported in the 2007 survey. In fact, this graph illustrates further that more members earn between \$90,001-\$125,000 and \$125,001-\$200,000 than was reported in the 2007 survey. This graph, therefore, reconfirms that COPA members' family income is higher than the national median income (\$68,410 in 2009) and is likely more than double that of the average Canadian family.

3. Within the next five years, you plan to (please check all that are applicable):



4. What were the reasons you joined COPA or renewed your membership this year. (Please check only three reasons)



The first three reasons chosen reconfirm that the three most important services COPA provides according the membership are lobbying the government to maintain members' freedom to fly; providing information, particularly in the *COPA Flight* newspaper, and on the website; and providing various membership benefits, particularly aviation insurance.

APPENDIX

1. COPA Membership Survey 2012

2. COPA Telephone Survey

3. Overview of Telephone Survey Results

COPA Membership Survey 2012

Please return your completed survey in the enclosed stamped envelope by **February 22, 2012**.



A. Please tell us about your current flying. (check all that are applicable)

1. Pilot license or permit held:

- | | | |
|---|-------------------------------------|---|
| <input type="radio"/> None | <input type="radio"/> Student Pilot | <input type="radio"/> Ultralight Permit |
| <input type="radio"/> Rec Pilot Permit | <input type="radio"/> Private Pilot | <input type="radio"/> Commercial |
| <input type="radio"/> Airline Transport | <input type="radio"/> Glider | <input type="radio"/> Balloon |
| <input type="radio"/> Gyroplane | | |

2. Types of aircraft flown:

- | | | |
|--|--|--|
| <input type="radio"/> Light Certified Airplanes | <input type="radio"/> Transport Category Airplanes | <input type="radio"/> Amateur-built Aircraft |
| <input type="radio"/> Owner-maintenance Aircraft | <input type="radio"/> Jets | <input type="radio"/> Turboprops |
| <input type="radio"/> Ultralights | <input type="radio"/> Helicopters | <input type="radio"/> Floatplanes |
| <input type="radio"/> Aerobatic Aircraft | <input type="radio"/> Balloons | <input type="radio"/> Gliders/sailplanes |
| <input type="radio"/> Gyrocopters | <input type="radio"/> Hang gliders | <input type="radio"/> Paragliders |

3. Ratings: Instructor Instrument Multi-engine Seaplane

4. Do you fly for: Personal Business Professionally Not currently flying

5. a) Total pilot hours (all types): _____

b) How many years have you been flying: _____

c) At what age did you begin your ab-initio training: _____

6. a) Total pilot hours flown during 2011 (all types): _____

b) How does this compare with your annual hours flown over the last five years:

- Higher Lower About the same

7. a) Do you own an aircraft (or aircrafts) or a share in an aircraft (or aircrafts)?

- Sole owner Own a share Not an aircraft owner

b) If you own an aircraft, does it have an electrical system?

- Yes No

8. Are you also a member of any of:

- | | | | |
|----------------------------|---------------------------|---------------------------|--|
| <input type="radio"/> AOPA | <input type="radio"/> RAA | <input type="radio"/> EAA | <input type="radio"/> UPAC |
| <input type="radio"/> USUA | <input type="radio"/> IFF | <input type="radio"/> SAC | <input type="radio"/> Any aircraft type club |

B. Please tell us about your use of computers.

1. Do you have access to the Internet: (check all that are applicable)

- At home At work Other place (eg: library, etc.) No access to the Internet at all

2. How many times per month do you use the internet to browse websites?

- Never 1-5 6-10 11-20 More than 20

F. Please provide your perspective on the services COPA provides.

1. Please **rank the following nine (9) services** (from 1 to 9, with 1 being assigned to the service that you value most).

- | | |
|--|---|
| <input type="checkbox"/> <i>COPA Flight</i> newspaper | <input type="checkbox"/> COPA Website |
| <input type="checkbox"/> COPA aviation insurance | <input type="checkbox"/> COPA for Kids |
| <input type="checkbox"/> Annual Fly-in AGM (convention) | <input type="checkbox"/> COPA staff to answer questions by phone and e-mail |
| <input type="checkbox"/> COPA lobbying efforts with government | <input type="checkbox"/> COPA Guides |
| <input type="checkbox"/> <i>COPA Flight</i> digital newspaper | |

2. The one new item that I would like to see offered for sale as part of the COPA collection of clothing and other merchandise is:

3. What two things could COPA National do to better promote its collection of clothing and other merchandise?

4. What two strategies should COPA National pursue to increase its membership?

G. Please tell us about yourself. (this information helps ensure that we are aware of the needs of all our members)

Membership number (important for prize draw): _____

Home province: _____ Age: _____ Male Female

Occupation: _____ Retired Not currently employed

2. Your annual family income is:

- | | | | |
|---------------------------------------|---|--|--|
| <input type="radio"/> \$0-20,000 | <input type="radio"/> \$20,001-\$30,000 | <input type="radio"/> \$30,001-\$45,000 | <input type="radio"/> \$45,001-60,000 |
| <input type="radio"/> \$60,001-90,000 | <input type="radio"/> \$90,001- \$125,000 | <input type="radio"/> \$125,001- \$200,000 | <input type="radio"/> \$200,001 and up |

3. Within the next five years, you plan to (please check all that are applicable) :

- | | |
|---|---|
| <input type="radio"/> Purchase your first aircraft | <input type="radio"/> Sell your aircraft and upgrade to another |
| <input type="radio"/> Sell your aircraft and downgrade to another | <input type="radio"/> Sell your aircraft and stop flying |
| <input type="radio"/> Keep your current aircraft | <input type="radio"/> Start building or restoring an aircraft |

4. What were the reasons you joined COPA or renewed your membership this year. (Please check only three reasons)

- The benefits COPA membership provides (aviation insurance, etc.)
- The other services and programs provided by COPA (i.e. Annual Fly-in AGM (convention), etc.)
- The information provided in the *COPA Flight* newspaper and on the COPA website
- The opportunity to meet and socialize with people who love flying
- Because I am a member of a COPA Flight (Local Chapter)
- To support the work COPA does to maintain our freedom to fly

All COPA members who complete a paper or on-line survey will be automatically entered in a draw for a Sennheiser S1 headset, the Quiet Revolution from Sennheiser Canada. Additional prizes provided courtesy of COPA, VIP Pilot Centre and Aircraft Spruce Canada. To be eligible for the draw, please complete this survey!

Note: We guarantee that your personal information will be kept confidential. KC Surveys, the survey company we hired to conduct this survey, will present only summary data in the survey report so that no survey participant's responses can be identified.

Overview of COPA 2012 Telephone Survey Results

Question 1 – Members findings on usage of COPA website

- Very few of the older members use the website and those that did found it difficult to navigate
- The younger ones would like to see the site modernized graphically and easier to navigate. Some realized that there was a lot of information on the site, but found it was cumbersome getting to it – so much so that they didn't have time to figure it out, and just left altogether, frustrated
- Some remote areas said recently it's hard to view classifieds – that something has changed so they are unable to view it or download this section

Question 2 – Members comments on quality of COPA FLIGHT newspaper

- A large majority expressed how much they enjoyed receiving the newspaper each month
- Some members would like to see more educational information and forensic analysis post accident.
- A favourite section was the classified, even among those pilots who are not flying any longer
- A number of members would like information to be more current other than rules and regulations
- Many would like to see more stories about Canadian members and more information about ultralights

Question 3 – Opinion about newspaper to become solely web-based

- A profound “strongly disagree” came from most respondents. Even the younger pilots still wanted to have a physical paper to read and carry
- A common response from remote respondents was that they do not have computer access yet or they have some sort of dial up which limits their ability to download or even access the site
- A few respondents would like to see an app for tablets – digital access. One member offered to design an app for COPA.
- Some respondents realized that this is the way of the future and they support fewer trees being felled for print; however, they hope it would be more accessible and better designed than the current website. General consensus is that switching to modern technology also brings a more modern approach to communications of current needs

Question 4 – Comments on value of membership in COPA

- Most appreciated their membership in COPA, with most scores being in the 4 or 5 range.
- Many would like COPA to be more proactive with Department of Transport to get more landing strips across the country, to get easier and less expensive registration for recreational aircraft, to advocate for areas with wind turbines which are altering landing procedures in some areas due to their 500 foot height. These wind turbines should be located in less populated areas so that air traffic wouldn't be affected as much.
- Some would like to have a 'central access' of information with COPA providing legal information for, and reporting on legal issues experienced by, pilots, aircraft owners, owners of landing strips etc.
- Many communicated displeasure with COPA for not telling them in advance about the change of insurance provider – why did they make the change, and what are the advantages for members.
- There was a lot of conversation about insurance and hoping COPA would advocate with insurance providers to cover areas which need covering, i.e. tools on the ground, certain repair costs, transportation vehicles for equipment, landing strip liability etc.
- Some members would like COPA to participate more in the attracting the youth – this could be achieved in many ways: including, for example, by focusing on and featuring light, recreational aircraft, parasailing, gliders and non-fixed wing craft.

Question 5 – Members experience with dealing with COPA staff

- Most said that this was a good experience and that the staff were helpful and informative.
- A few said that it took a long time to get a reply to telephone calls and emails, and sometimes there was no response at all.

Question 6 – Satisfaction with services received from COPA Flight chapter

- Most did not know if there was a chapter in their area and would like COPA to guide members on how to communicate with local pilots to form a chapter. Also, some wanted guidelines on how to create a chapter – the laws and regulations etc.
- Some, who had a chapter in their area, had never been contacted and would like to know who the members are and where these chapters are located

General Overview of Telephone Survey 2012

Members value COPA and felt improved communication throughout the country would better support a solid network of people who like to fly.

Insurance is a huge motivator for membership. It was suggested that the specific benefits of COPA's chosen provider be communicated clearly to the membership, and any changes to this arrangement be communicated to the members as soon as possible.

It was noted by some that Transport Canada is a 'crumbling ministry'. They felt, however, with the right COPA representative (someone who can nurture an open and amicable relationship) our national needs could be met with better efficiency.

A fair number of respondents wanted to be involved with COPA to help, for example, to grow a younger membership and to widen the communications to all 'fliers' (including light aircraft). With planning, these types of members could perhaps be organized to help COPA grow and better meet all members' needs.