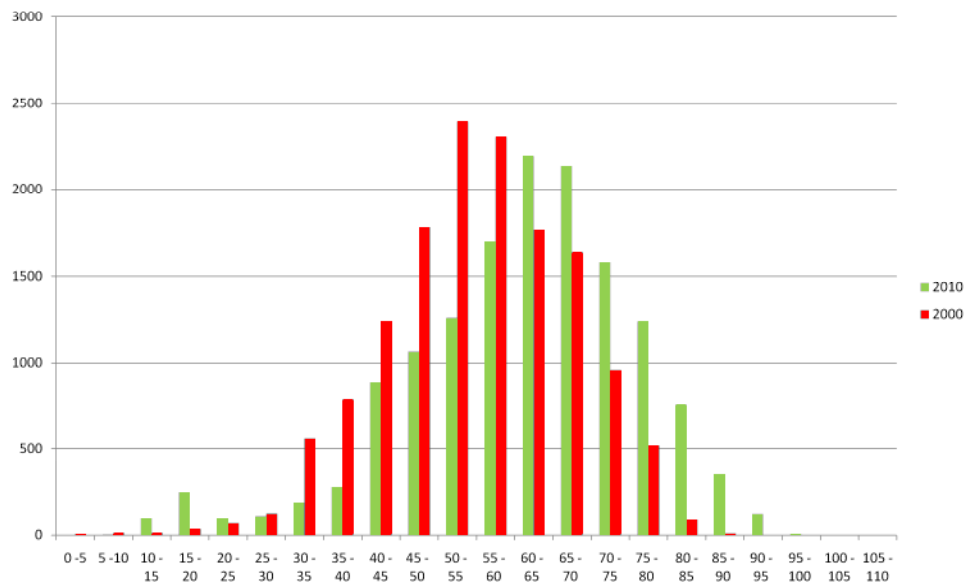


Amateur Radio Survey

Questionnaire Analysis
2011

Membership seems to be ageing!

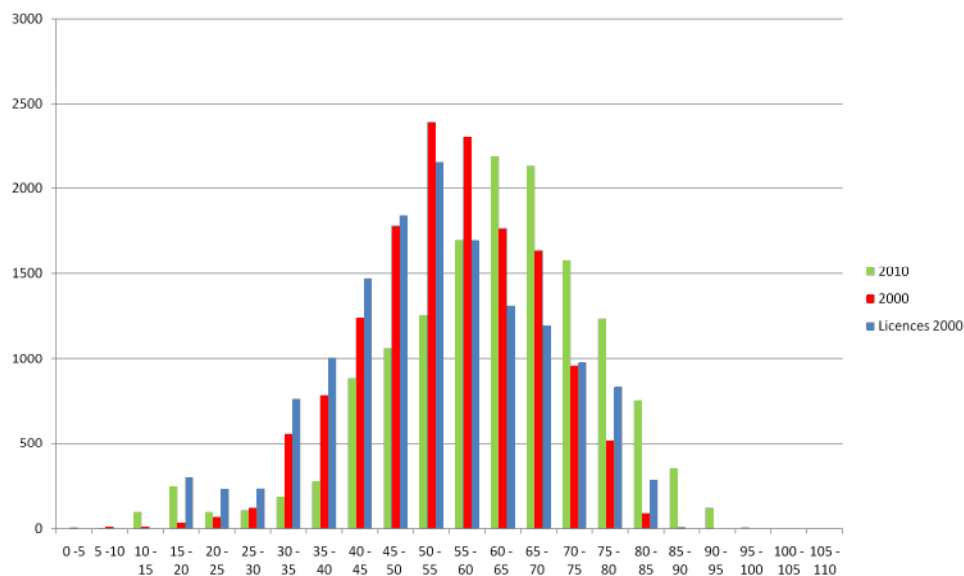


This shows the demographics of our membership. We were able to use our membership database one can quite simply plot the number of members in each age group. This plot shows, in green, the membership age profile as it was in December 2010. The red plot is an attempt to use the same data, i.e. December 2010 data, and roll back how the same data would look in 2000.

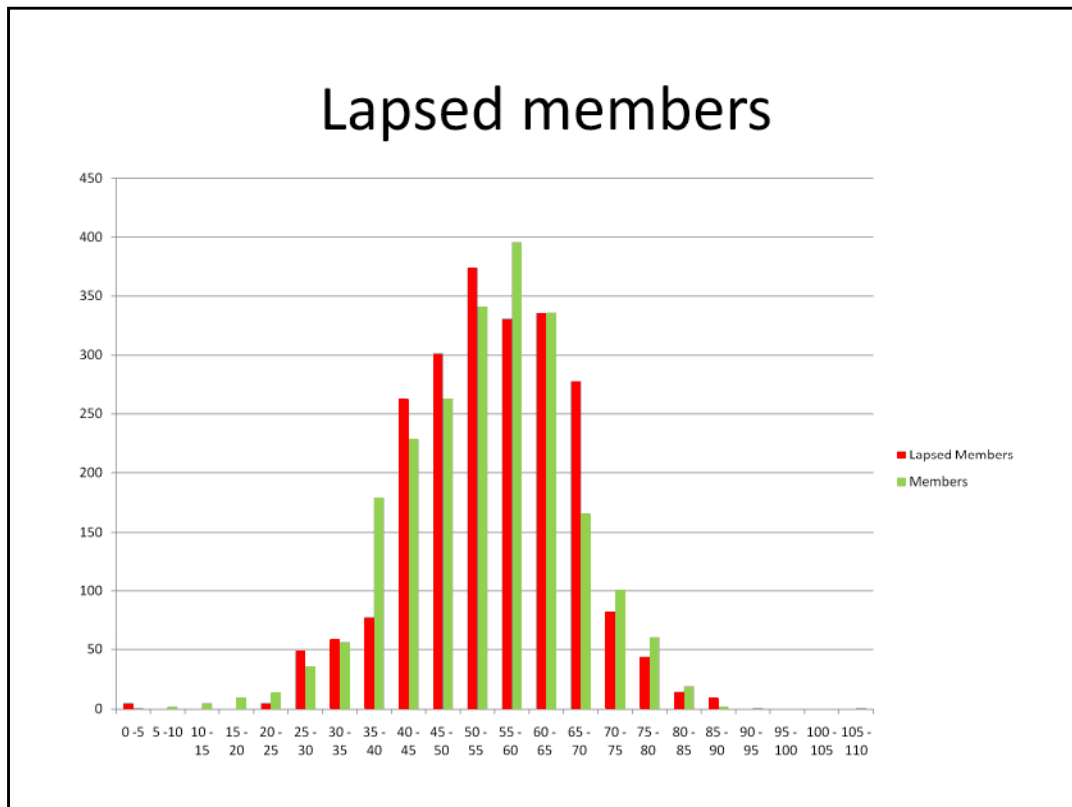
There are a couple of things that should be said about the red profile, firstly the December 2010 data doesn't include those members who lapsed (10% pa) and didn't rejoin (7% joiners pa) between 2000 and 2010. (We get around 10% of members lapse per year and around 7% rejoin). The second point is that as the data set for 2000 is smaller to make the comparison with 2010 clearer the 2000 data has been normalised with that of 2010.

"Health warnings" aside it is difficult not to conclude that in 10 years our membership profile has aged 10 years. Perhaps some good news is that there is a small peak amongst the young members that isn't present in the 2000 (red) profile.

+ normalised 2000 licensing data



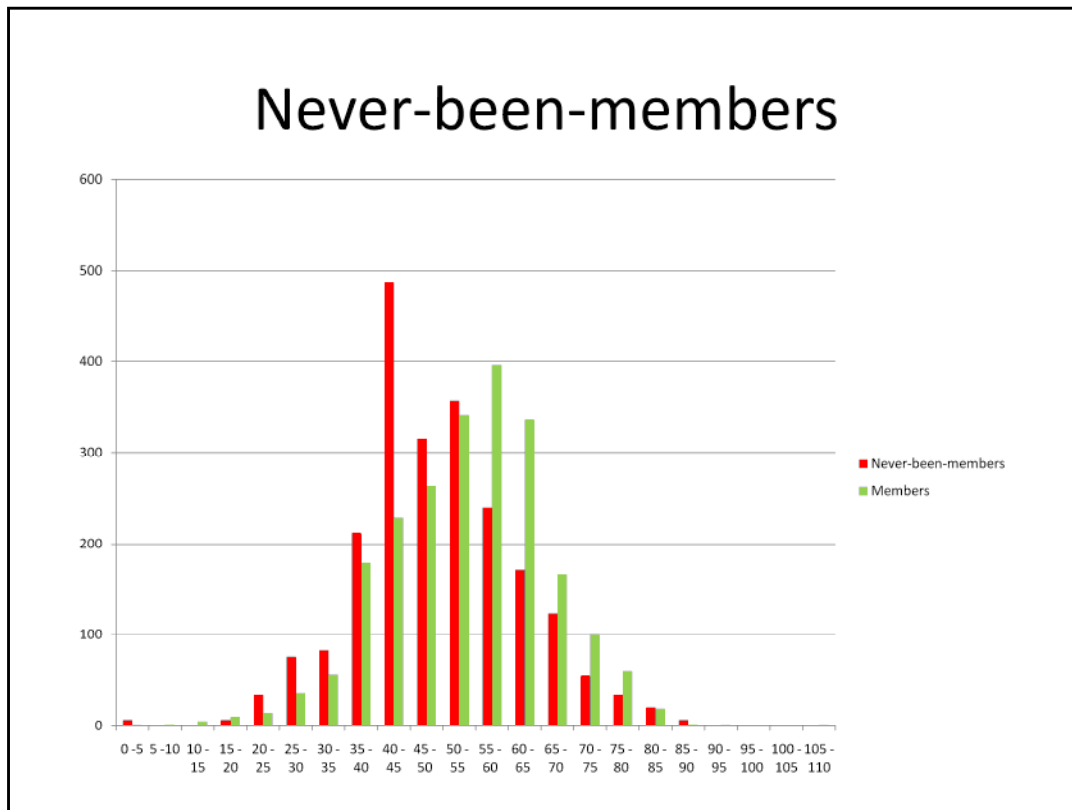
This is the same data as the previous slide, but with the addition in blue of the licensing data as in 2000 normalised to RSGB Membership figures. Whilst this is not quite like-for-like in that the blue lines are licence holders and the red/green are RSGB members the peak around the 50 – 55 age group is a good match with that of the membership data.



This is the demographics of our lapsed members. In green we have the membership age profile. In red is the age profile of members that have lapsed but not subsequently rejoined. Again, as before the lapsed profile (red) has been normalised to that of the membership so that comparison is easier.

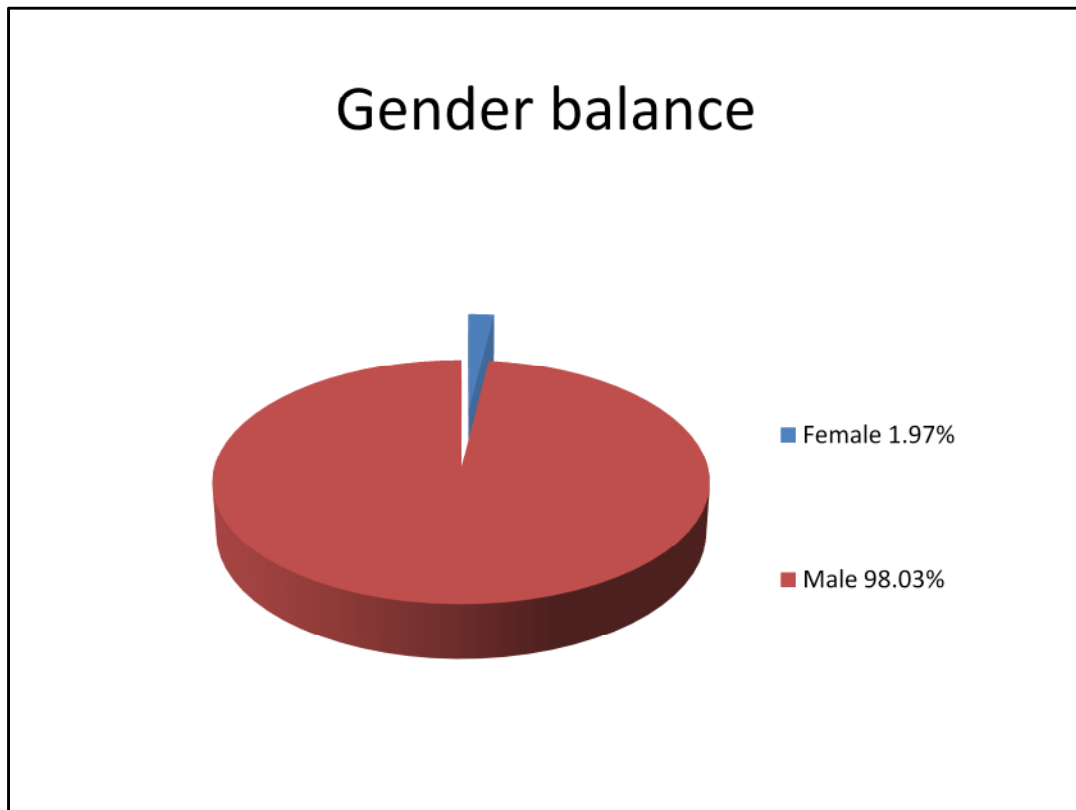
The loss of the 20 – 35 year olds is understandable, as these are young adults with careers and perhaps relationships/families on which to focus. More concerning is why the hobby is loosing a disproportionate number of people in the 40 – 50 age group. One thought that this is when their children are teenagers and perhaps joining for free, thus their father (mother) lapses his (her) membership as the family gets RadCom, etc, through the child's membership.

Interestingly, members in the 60 – 80 year old age group seem less likely to leave

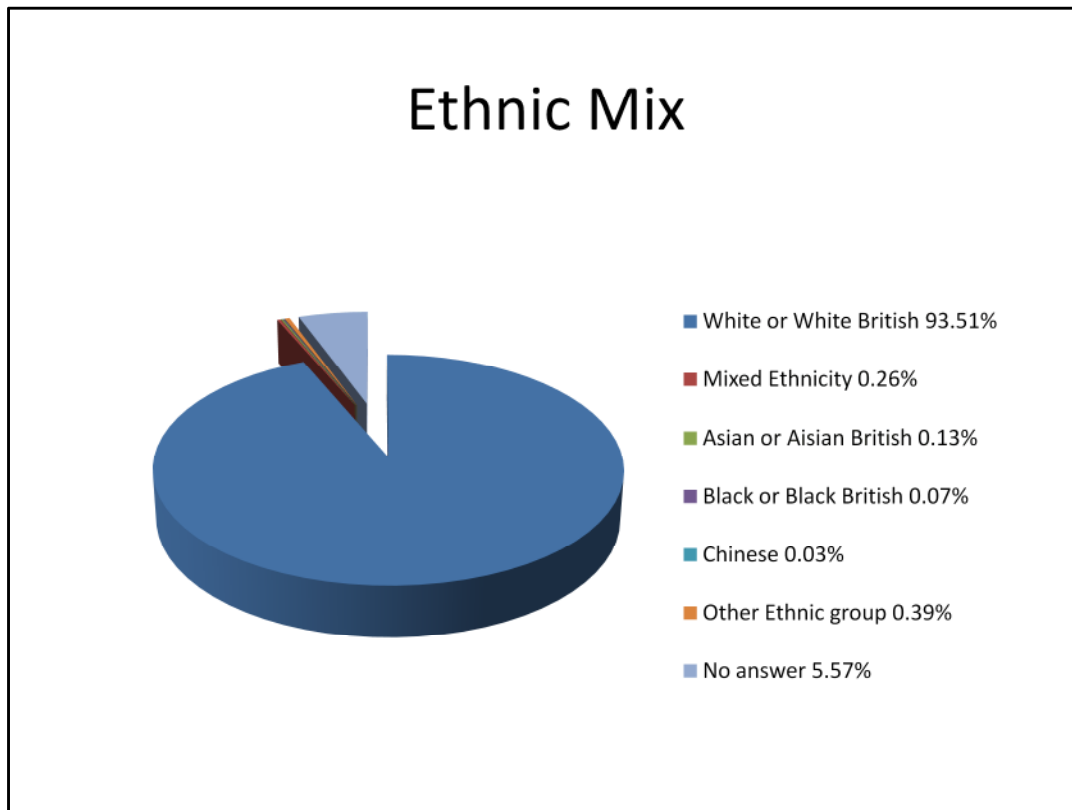


Before leaving demographics let's look at those who responded to our Questionnaire, but who claimed to have never been members of the RSGB. As before the membership profile is in green and this time it is normalised to the data for never-been-members.

The interesting factor from this comparison is why we get a peak of never-been-members answering the Questionnaire in the 40 – 45 age group. Is there some untapped group of amateurs who we have not attracted into the Society? If so, why haven't they joined? Why too, was the Questionnaire less attractive to never-been-members in the 55 – 65 year old age group?



This doesn't match too well the nominal 1:1 ratio



This was an optional question – interesting that only about 6% declined to answer. In comparison to recent statistics on ethnicity within England, this strongly suggests that the non-White and White British ethnic groups are significantly under-represented in the hobby. The figures (2009) for England are

White or White British – 88%

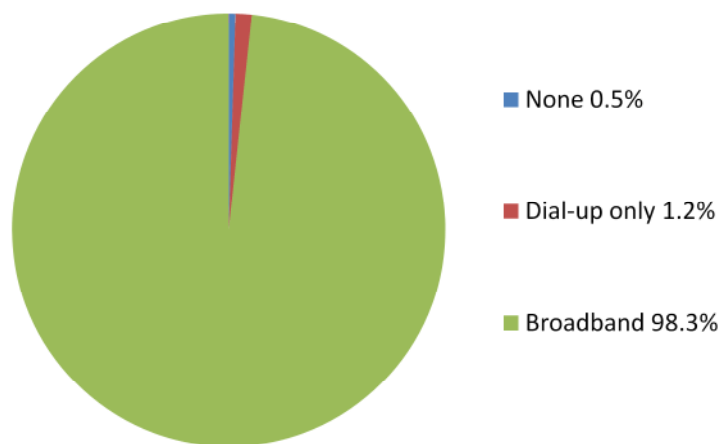
Mixed Ethnicity – 1.7%

Asian or Asian British – 5.7%

Black or Black British – 2.8%

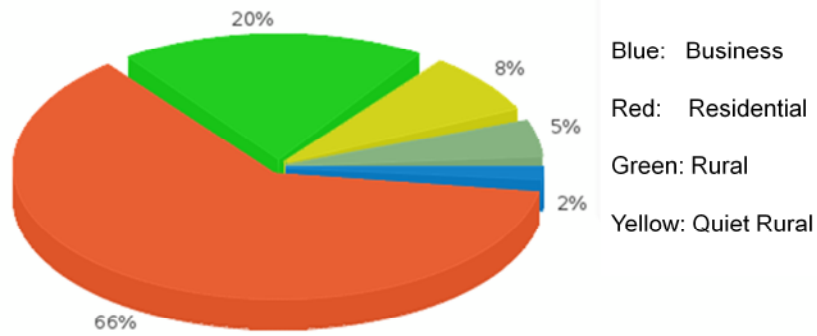
Chinese and other ethnic groups – 3.4%

Type of Internet access



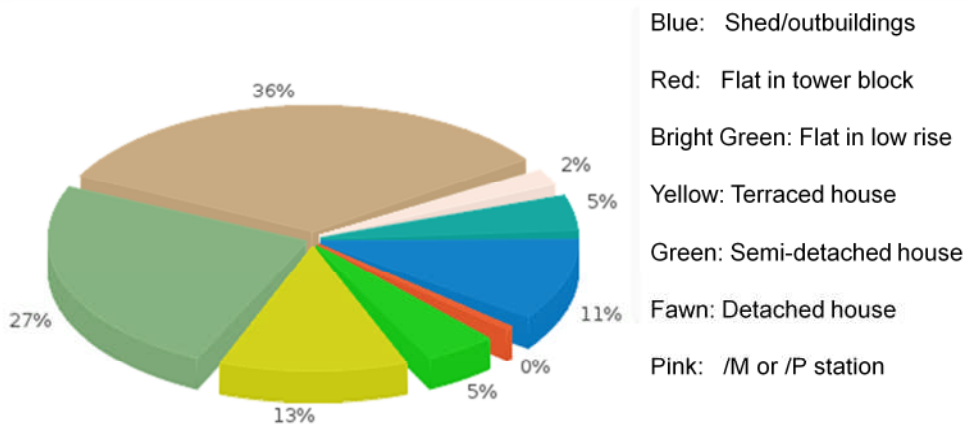
All of the "none" group either accessed the Questionnaire via a friend's computer or else at the local library.

Where are we located?



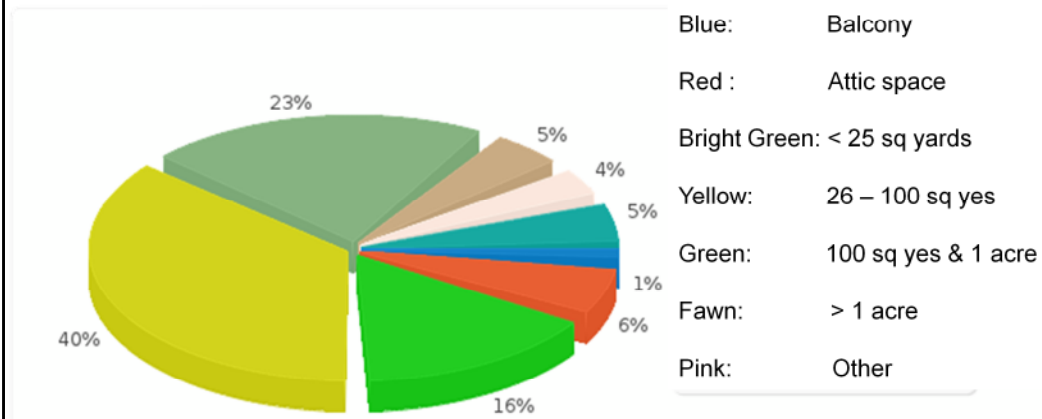
This pie chart shows that $\frac{2}{3}$ rd of us live in urban areas, and a further $\frac{1}{4}$ living in rural areas. The percentages are slightly wrong as the data set includes 5% of respondents that didn't get asked the question – presumably they didn't currently have a station. The classifications are those used by the ITU for its radio-noise level assessment.

Where do we have our Station?

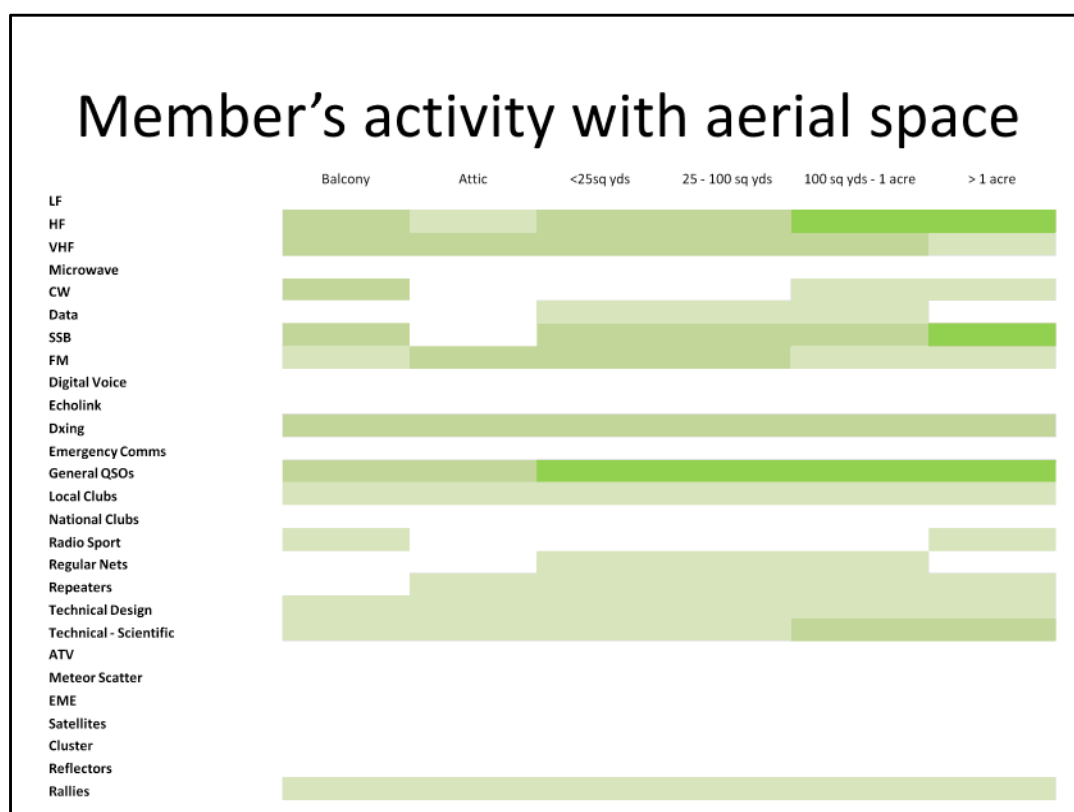


This view of the data shows that a $\frac{1}{3}$ of us live in detached houses, with a further $\frac{1}{4}$ in semi-detached houses. Interestingly, 2% only have a /M or /P station.

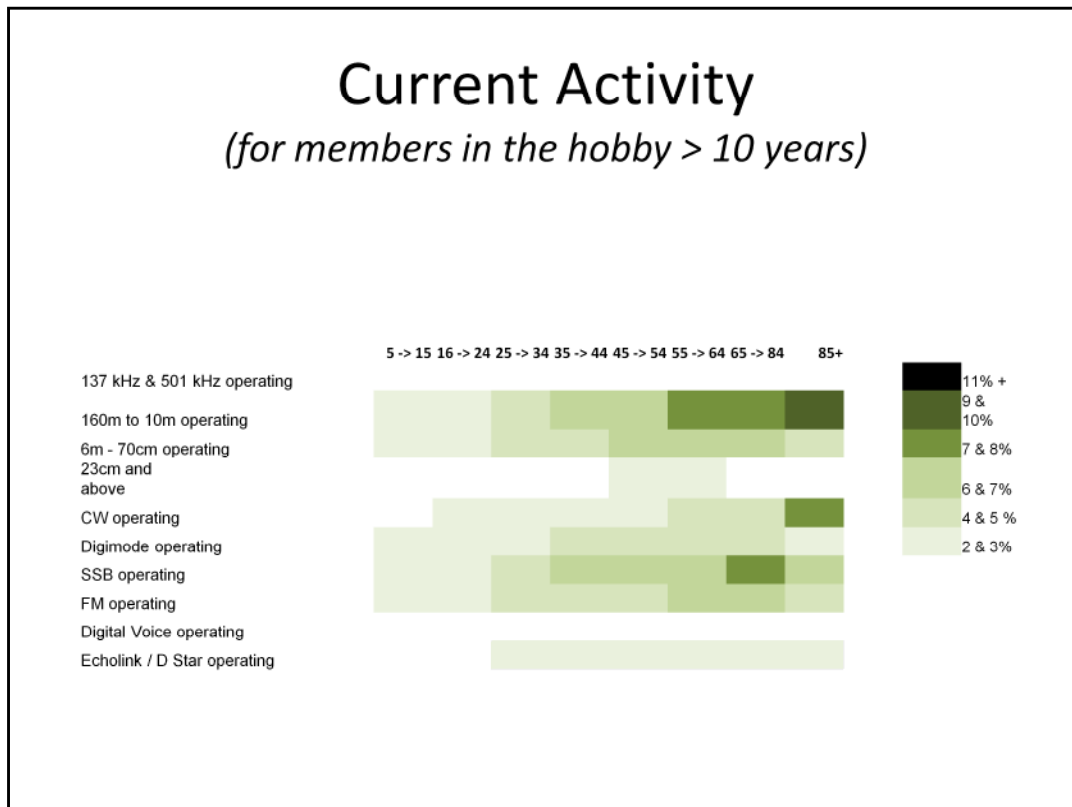
Space for our aerals



This is where we look at the space for aerals. Nearly 2/3rd of us have a garden between 26 sq yards and an acre. For the future, perhaps we ought to be planning for a higher percentage of members living in urban areas and in houses and gardens that are generally smaller. The Government policy of creating high-density housing in new builds will perhaps make this worse.



The activity is colour coded such that the darker the green the greater the activity amongst groups with the various different spaces for aerals. Whilst those with larger space for aerals focus on HF operating and SSB more so than CW, there is a general trend toward general QSOs. What is quite interesting that those with least aerial space and those with most seem to spend more time than those with average space for aerals on contesting; in the case of those with very limited space this could mean operating as members of contest groups.



Probably the most interesting analysis that we have done from the Questionnaire is shown in this and the next slide.

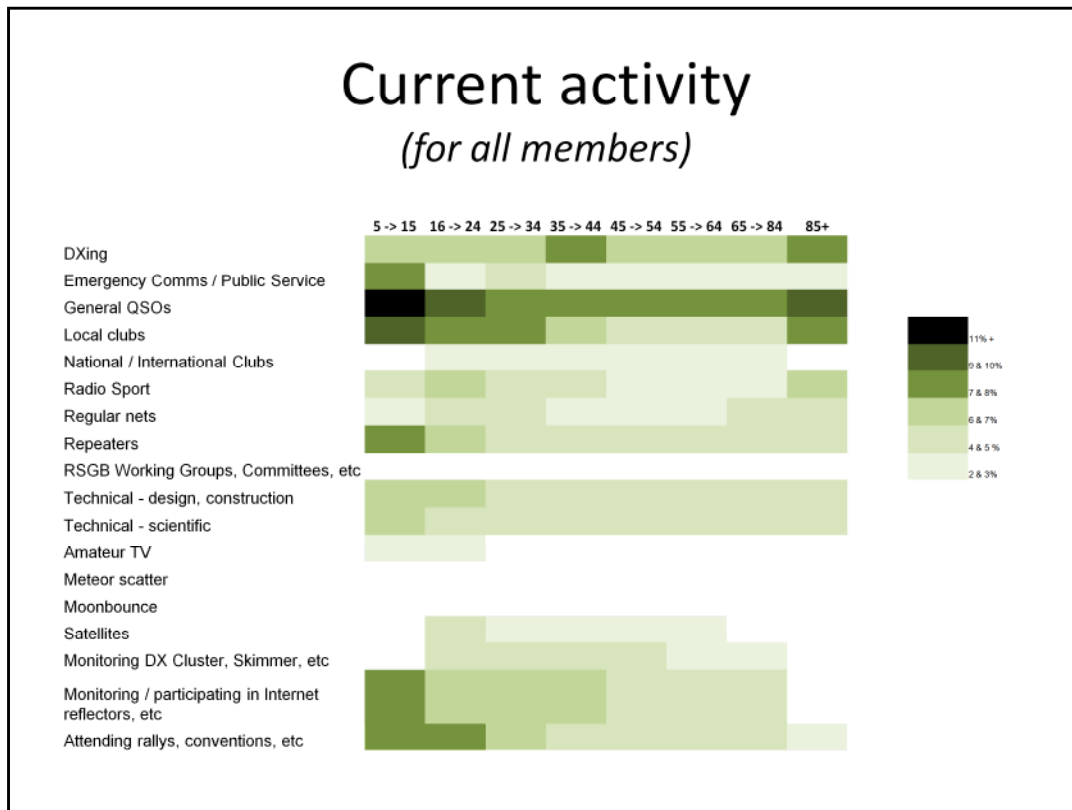
Here we are looking at the data that came from the questions about your current activity in the hobby.

Activity is colour coded on a scale of black for very high levels of activity to faint green for low levels of activity, with no tint for very low levels. From a statistical viewpoint we can only treat these outcomes as “Trends” for all sorts of technical reasons.

Thus, in terms of trends we see that there is generally more interest in operating between 160m and 10m than on the VHF and UHF bands, and that activity, certainly on the 160m to 10m become more so with increasing age.

SSB operating and CW are more popular than FM and Digimode in that order, and that SSB and CW activity peak in amongst our pensioners. DXing seems to have two peaks – in the 35 – 44 age group and then again in the 85+ age group.

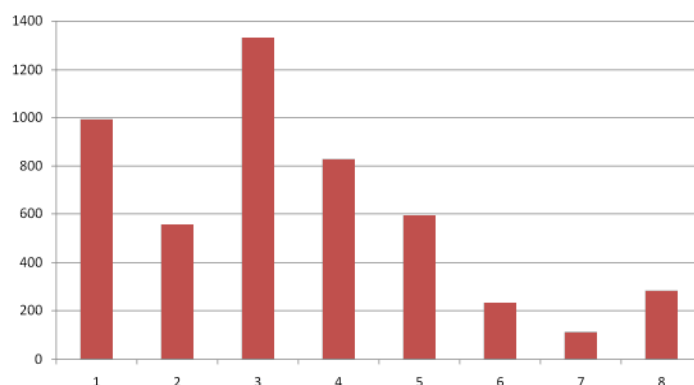
Of interest in the real peak of activity amongst our young members in general QSOs and also Public Service. There is perhaps a slight “health warning” warning with apparent “Trends” in both the 85+ age group and those under 15s, as the data has been weighted to adjust the sample age demographics to that of the whole membership. Thus, the individual responses will have more weight (as there were fewer responses in percentage terms for both of these groups). It’s possible that we had a few in the 85+ age group that answered this question retrospectively, i.e. what they used to do rather than what is their current activity. We may have had a few enthusiasts for general QSOs



This second chart shows the remainder of the data. There was an error in the logic of the Questionnaire so this set of activities was collected for all members, irrespective of how long they had been in the hobby. This meant that there were 263 or just over 10% more contributions to the data set.

Here the interest in local clubs and repeater working is clear amongst the youngsters, but interestingly some retained level of activity in technical and scientific aspects of the hobby. As could be expected the younger members are generally more active in Internet reflectors, and interestingly in attending rallies, conventions, etc.

Why did you join the hobby?



1	I was already involved or interested in radio communications and wanted to develop it as a hobby
2	I was interested in amateur radio many years ago and decided to renew my interest
3	An interest in technical things - understanding how they work, using them, etc
4	Someone that I know was already interested in the hobby, and it appealed to me
5	Wanted to learn some new things, develop new skills, etc
6	Wanted to get out and meet people, to join a local club and participate in their activities
7	School teacher / lessons
8	Other

This was an open question, with a number of suggested answers but also the opportunity to add one's own reasons if they were not otherwise covered. With over 5,000 different answers each member on average selected just fewer than two reasons. The 304 additional reasons have been manually reviewed and either added as additional reasons or else scored with one of the existing reasons.

The most popular single reason gaining nearly a third of the vote was “an interest in technical things – understanding how they work, using them, etc”. About 20% joined the hobby because they already knew an amateur and another 20% joined because they were employed in the radio communications or the electronics sectors . Around 10% took up the hobby as they wanted to do something new – a few who completed the “other” text box mentioned the need for a hobby on reaching retirement, so some clearly got involved later in life. 5% of the reasons claim that they joined the hobby to socialise; one disabled member sums this up rather well by commenting that one can participate yet be anonymous.

Why did you join the hobby?

- Of the 281 “other” reasons, the main “trends” were
 - Listening to amateurs on broadcast radios
 - Limitations of CB in the 1980s
 - Special Event stations
- Possible “trends” that were more or less in the noise were
 - School (inspiring teacher, clubs, etc)
 - Cadets & Scouts (JOTA)

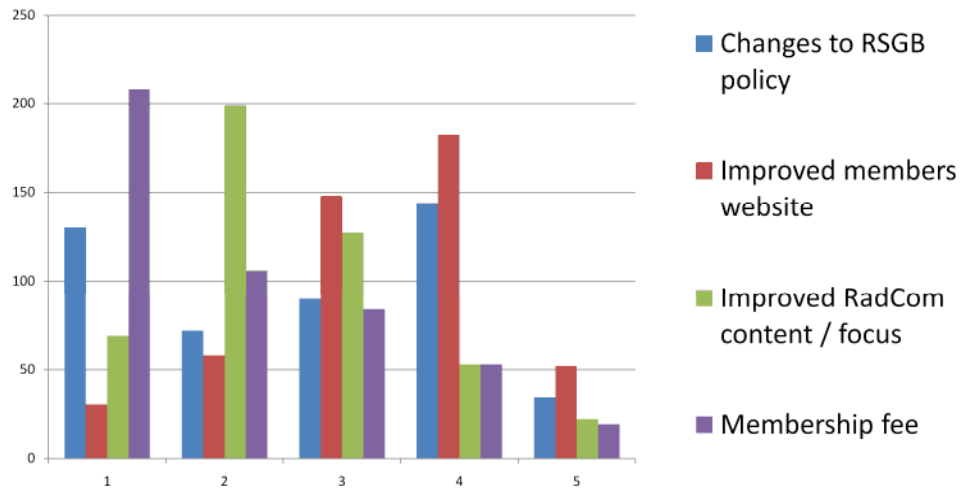
Two of these “other reasons” for joining the hobby are or soon will be lost to us – CB is already much less popular than it was in the 80s and with the demise of analogue radio the opportunity to stumble across amateur traffic will be reduced further. Indeed, as has been pointed out in the Focus Group with the source and delivery means of broadcast news and entertainment being less significant the skill of “tuning in” a radio be soon be more or less relegated to history.

HQ Departments

- Over half of the respondents contacted HQ in relation to Book Sales (all sales?) and their experience with some confidence is Excellent or Good
- There is a trend that contact with Membership and RadCom is Excellent or Good, and some evidence that Accounts, Amateur Radio, Contests, Examinations are seen in a good light
- A possible trend, in statistical terms, that contact with the GM's office and Regional Team might at times be poor
 - The sample size was relatively small
 - This could be a biased sub-set as contacts may have been on a complaint not being settled to the complainant's satisfaction

The feedback on Book sales is one of the few analysis outcomes from the Questionnaire that we can state with any degree of statistical confidence. But there were also strong trends in terms of the Membership and RadCom “departments”.

Ranked reasons for not re-joining



This plot needs some explanation. Lapsed members were asked to rank some given reasons why they haven't re-joined. The first rank choice seems to be Membership Fee though with RSGB policy being quite close. The second ranked reason is more clear cut, being Improved RadCom (content/focus). There seems to be no real trend with the third rank option, though the least ranked item seems to be RSGB policy and the website.

Some reasons for not re-joining

- Around 50% opted for “other” in their ranking, of these 470 suggestions the possible trends were
 - Spat with RAYNET
 - Dissatisfaction with the Foundation Licence
 - Dumbing down of standards, maybe limit it to 5 years to force progression
 - Abuse by Foundation licensees of their licence
 - Forcing of professional engineers, etc, to progress via the Foundation Licence
 - Expansions on the membership fee issue, e.g. Non-RadCom membership
 - Less commercialism. Most RSGB services are fulfilled by volunteers yet the RSGB is run on commercial terms
 - Lack of success and teeth with regard to spectrum protection
 - RSGB should listen more

With the “other” category roughly 50% of the pre-set options, the tail is large in terms of reasons for not re-joining. Lots of hobby-horses, but the above subjectively assessed trends are visible.

Some reasons for not re-joining

- RSGB Policy was against abolishing Morse testing and against the free licence of which I strongly disagree
- RSGB is inflexible and too full of its own importance to make changes which would make it useful to clubs and individuals
- RSGB needs to be better involve average radio amateurs in a straightforward way
- Your target-demographic should be the cell phone base-station engineers and Wi-Fi infrastructure technicians. Give them an easy route to getting a full HF licence. Take radio to the masses not the scouts and guides
- So long as the Society maintains its stance on "easy access" to an amateur radio licence it will continue to frustrate those who are aspirational and take some pride in their achievements
- Wake up. Bring yourself into the modern era of the 21st century. Stop thinking that ham radio is like it was back in the 20th century, it isn't

This somewhat random set of comments represents a few of the more eloquent contributions. An example of the less eloquent ones was in respect of the question as to why the individual was not active the response was “40's reenactment eand mootorsport” - this underlines the broad competition that we face in terms of attracting and retaining members.

RSGB Website

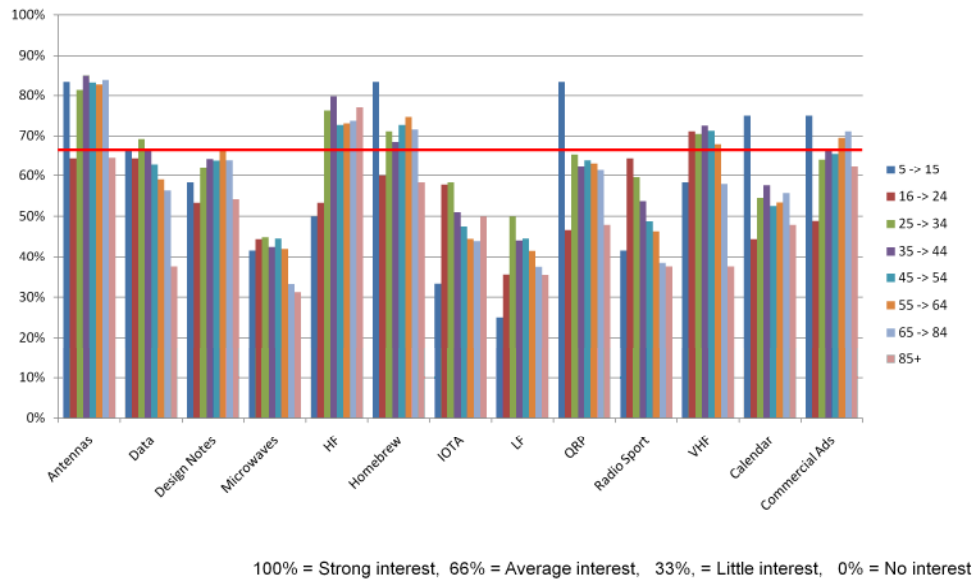
- Around 20% of members felt that the website should be improved
- The perceived problems were reported as follows
 - (20%) Difficult to navigate, to find things, etc
 - (18%) Not enough content
 - (16%) Too much “static” content
 - (11%) Not interactive enough
 - (8%) Not all in a single Internet “domain”
 - (6%) Not enough multi-media
 - (4%) Too promotional
 - (4%) Pages too slow to load
- There was a trend that the 25 – 45 year old group was most critical, and the 65 – 84 year olds being least critical. The age groups below the age of 25 years was also highly critical but the sample size was small to allow this to be seen as a trend

Some selected website comments

- *In response to what the website should look like in 10 Years Time -*
Seriously, you should be doing all this stuff with your website now! You need to integrate, blogs, Twitter, Facebook and all the social media tools at your disposal now. Take a lesson from how other large companies engage using social media with their customers e.g. BT, Vodafone, Dominos Pizza etc
- The website should be free of closed format content (like Flash) which makes it difficult for people to use, especially people with special needs (like the blind).
- The website should be the first port-of-call for radio related information, news, projects, etc. The site should aggregate articles from across the web and provide frequently updated RSS feeds. Southgate ARC provides a very good news aggregation service which is superior to anything offered by the RSGB site. This is the wrong way around!

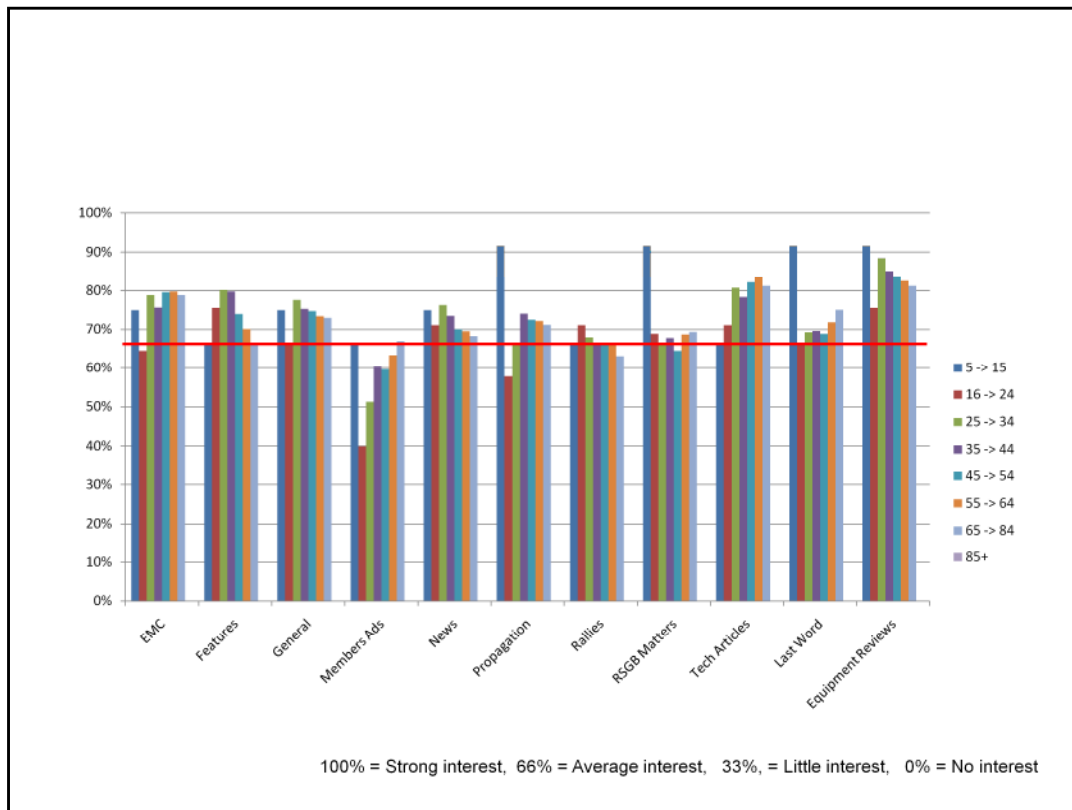
There were many suggestions concerning the web, the above is just a few to give a flavour of the detailed nature of the feedback.

RadCom: degree of interest



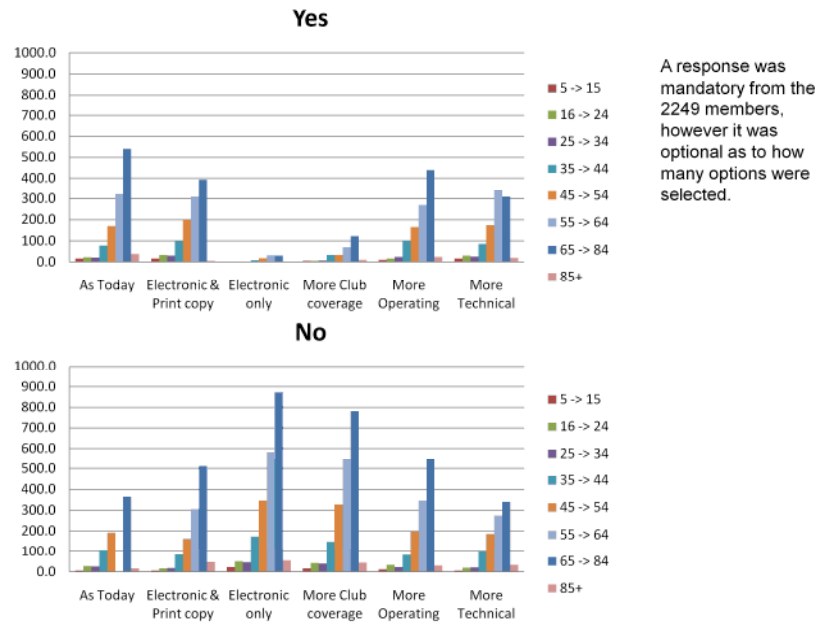
The plot needs a little explanation. Firstly, average interest is at a percentage of 66% - where the horizontal red line is shown. For each RadCom column or article type the age group interest is shown in different colours, that run from left to right in age group order. Again, as with the previous data set the age groups are weighted; thus caution must be taken in accepting the apparent “Trends” for the 5 – 15 year age group and also perhaps the 85+ age group.

The main trends are that Antennas, the HF & VHF Columns, Homebrew & Commercial ads are popular. Items such as Microwaves, LF, IOTA and Radio Sport only appeal to a minority group. The Data and Design Notes columns are just below average interest.



Here all but Members Ads, seem to be read by most members

Future options for RadCom



Whilst on RadCom we asked for people's preference on how they received it. As you can see there is a spread of views, except that most agree on not having an Electronic only copy of RadCom.

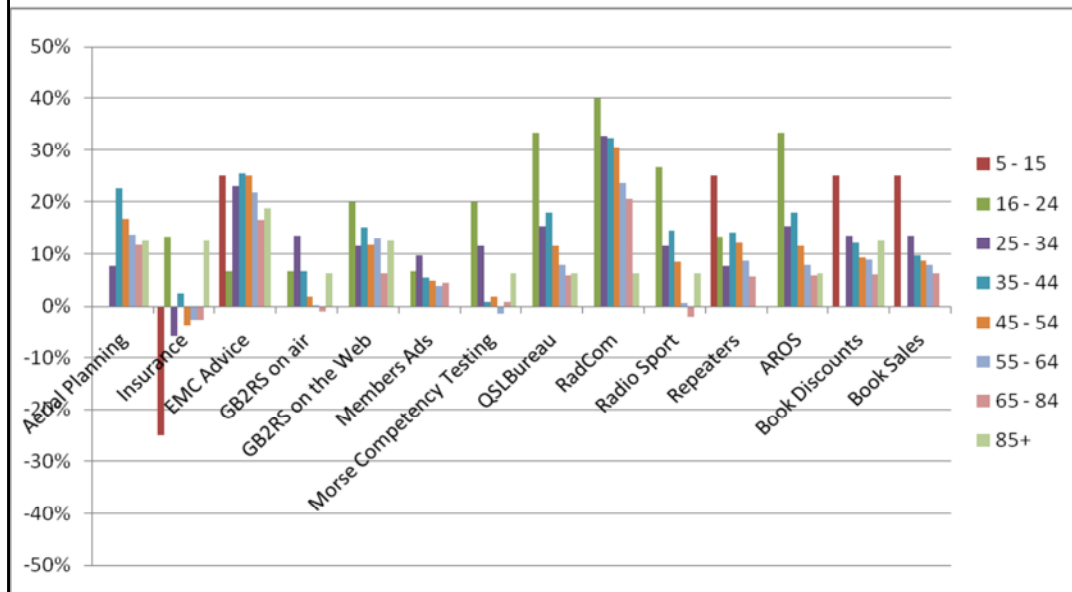
RadCom – sample of comments

- Radcom has been excellent over the years, and has developed my technical and constructional skills, with many detailed high quality projects.
- If the Society wants to promote itself why is it a closed shop. Go and put the RadCom into WH SMITHS at £3 a copy. Get more readership
- RadCom has too much idle chatter and not enough technical content. It has been dubbed down as a result
- More, basic stuff for newcomers
- More complex homebrew projects
- less pictures of scruffy individuals!
- pay some money for professionally written articles [*sic*]
- Less certificate wavers, more middle-order practical technical information
- less boring photographs of people holding foundation exam passes!

The comments on RadCom, as with other aspects of the hobby are both broad and contradictory.

Whilst there are probably, almost certainly, some gems within the comments the broad trends detailed in the previous slides are the main outcomes that come from the Questionnaire.

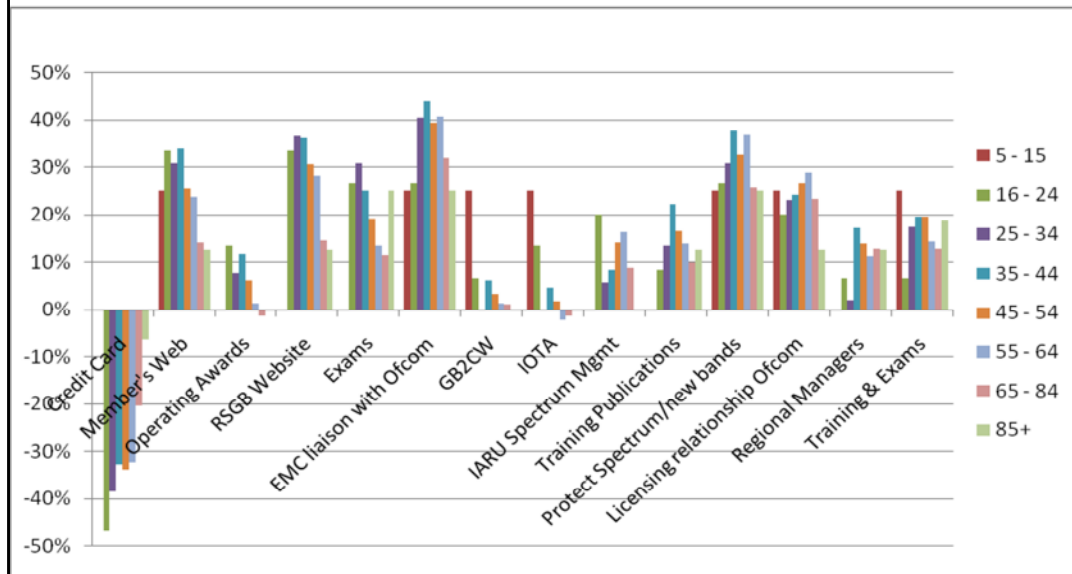
Future needs: Member Services



Here, the plot has the same age group structure with the previous plots, but you should interpret the 0% line as the status quo, i.e. “maintain” the service. For example for RadCom 40% in the 16 – 24 age group, along with relatively high percentages in the other age groups voted for this to “improve”. This outcome isn’t necessarily saying that it’s bad, but just that members would like it to be even better. Plots below the 0% suggest that the service could be discontinued, for example the Insurance service – here the question was probably not understood by most respondents as the RSGB provides essential insurance service for some repeaters, clubs, beacons and RAYNET activities, etc.

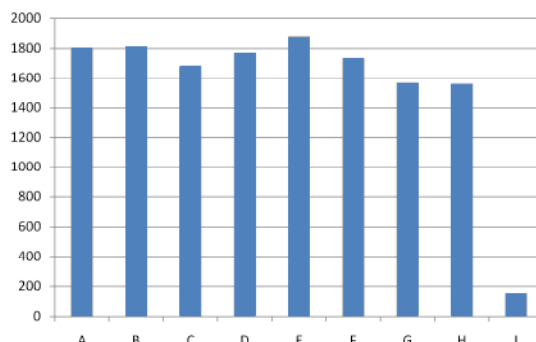
Apart from RadCom the other most significant trend is for an improvement in EMC Advice.

Future needs: Member Services



This plot of the remaining services shows that members would like to see improvements in all of the services except the RSGB Credit Card. But the website, EMC liaison with Ofcom, Spectrum Management through IARU, ITU and CEPT, and also our licensing and enforcement relationship with Ofcom. Taken as a whole asking the question in the way that we did the result that most members would like most of the services to be retained and improved is unsurprising. What we get from this plot is the relative importance between the services; this will be important for our future planning.

Given today's aspirations which do you feel the Society should be by 2020?



A	The representative body within the UK for radio amateurs
B	A Society that promotes and supports the hobby such that its members are proud to be identified as members
C	A Society that provides a range of educational & training material
D	An influential national society within IARU
E	A national society that other countries will respect and look to for leadership, innovation, etc
F	An organisation that can provide input to national and international professional bodies, thus influencing decisions & gaining the hobby respect
G	A organisation that runs and supports others to organise, events in which members can improve their skills, widen their interests, socialise, etc
H	A club that maintains our national heritage in radio communications
I	Other

Statistically, this is a more or less equal outcome for all the options suggested.

Given today's aspirations which do you feel the Society should be by 2020?

- 154 “other” suggestions, which were wide and varied. Some key themes were
 - A Society that supports Emergency Communication organisations
 - Stands up to Ofcom with more vigour
 - A Society that listens to its members & gains real respect
 - A Society that raises the profile of Amateur Radio within the UK
 - At the forefront in combating DQRM and other licence abuse
 - Promote radio to the young - make it cool
 - A open society with transparent decision making
 - Point of reference for film/documentary makers and media in general
 - Work towards being the "must join" organisation for all those interested in radio

Remember, these are themes – only 154 people out of the 2,000 odd who responded opted for some other aspiration.

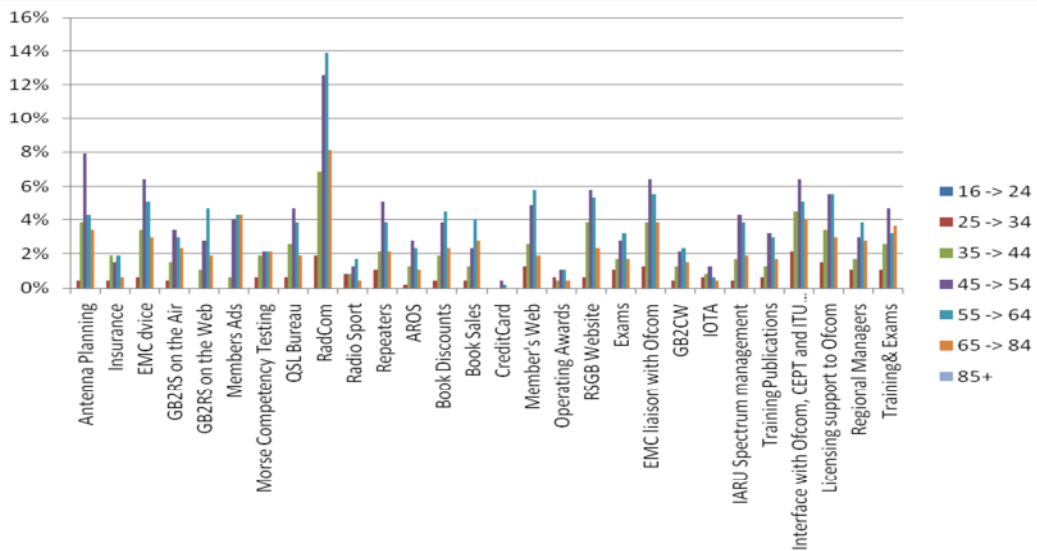
Lapsed members negative perceptions

- Commonest comment is that membership is too expensive (perception that the RSGB is run as a profit-making concern!)
- Lots of comments about RSGB being an “old boys club” with the same faces swapping roles – also that it is still the London Wireless Club – however, there was no supporting evidence of why the respondents feel this to be so
- Some wonderful ones “I believe the RSGB is withholding news about future propagation – why?” – the mind boggles!
- Too much focus on sport radio and contests to the detriment of technical matters
- Lots of negative comments about the term Radio Sport, e.g. “sport involves running about getting sweaty”
- Contesting too comes in for some harsh comments

Clearly, many leave – especially with the squeeze that is now on us all - because they decide to no longer afford the membership fee. But there are some disquieting comments about the way in which the Society is run.

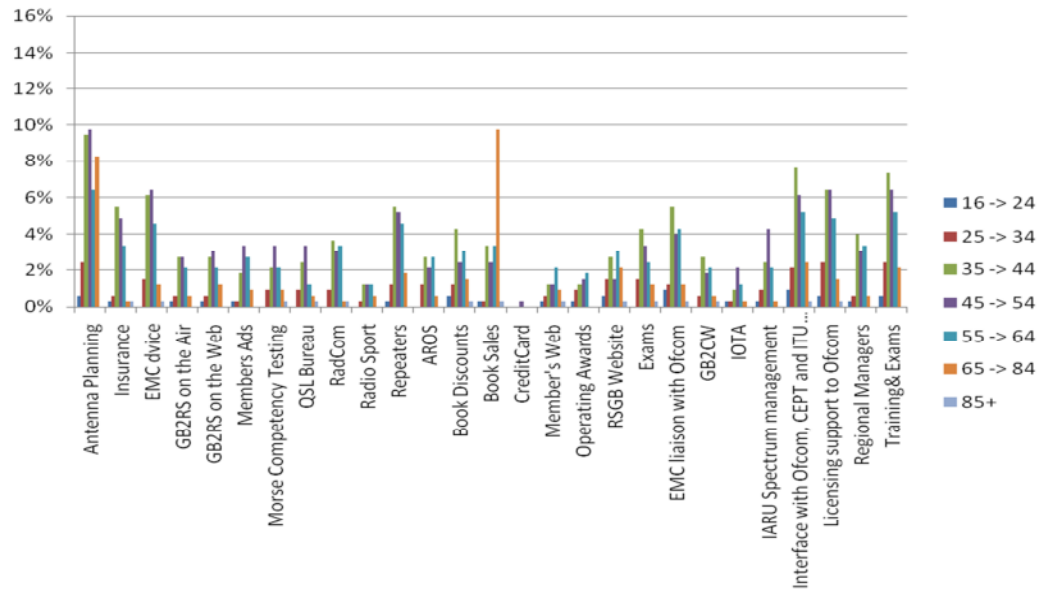
There were also quite a lot of issues about balance, e.g. “Why does the RSGB run pages about ARDF? There must be a maximum of 2% of UK Amateurs who want to run round in the rain so why fill so many pages with their exploits”.

Service need for lapsed members



This is what lapsed members would like to see improved for them to consider rejoining the RSGB. For this group improvements in RadCom seem to be the single largest area for improvement, though the trends also mirror those wishes expressed by members with the exception of Aerial Planning support, which has a higher profile amongst lapse as opposed to current members.

Service needs for newcomers



Looking at the preferences for people who have never-been-members. Interestingly, again many of the needs are the same as those of Members and Lapsed Members, but understandably more or a focus on Training and Exams.

Some general comments

- Poor awareness on what the RSGB does.
- Negative comments about the Foundation Licence
- Expected frustrations showing up about PLT and other QRM, bad operating (DQRM), repeater abuse, etc.
- Suggestions of more use of online forums, either in addition to or instead of RadCom
- Opposing views as
 - to whether the focus should be on encouraging the technical aspects or operating
 - Promoting amateur radio where it overlaps with the Internet, and those who want in promoted, where the hobby differs from the Internet.
- Some see that the RSGB had an excellent student membership scheme. However, there were also comments that the transition from this to full membership was very steep.

Some general comments

- Expected frustrations about PLT, QRM and bad operating
- Barely any mention of Public Service as against Emergency Communications
 - Will the former every be as big as in the USA
 - Supporting charity walks, etc is of great interest to youngsters and shows the hobby in a positive light.
- Lots of the older respondents saying that their generation shouldn't be so negative towards newcomers
- Irritating to see people asking
 - RSGB to do things that it does already (like reduced membership for youngsters)
 - for RSGB to do everything, i.e. all the stuff that they, their local clubs, or whatever should be doing – abrogation of responsibility!
 - for things which RSGB couldn't do even if it wanted to (e.g. areas which fall under OFCOM, Dept of Education, ban DX Clusters, etc)

To attract newcomers (all ages, weighted)

- (29%) Young people will be attracted if they perceive amateur radio as being popular with young people
- (13%) Advertise / publicise more often to the younger generation
 - Popular websites for young people
 - Facebook / Twitter, etc
- (9%) attract through Scouts , Guides & Youth Organisations
- (8%) use GB4FUN
- (4%) Stop older amateurs from being so negative toward the younger generation of amateurs

This is the summary of the question that asked an open question on what we needed to do in order to attract newcomers, especially from the younger generation, into the hobby.

The percentages represent the numbers of times for which a particular trend was voted. The problem is that the most popular trend was itself a circular argument.

To attract newcomers

(Responses from 10 – 25 year olds)

- (30%) Advertise / publicise more often to the younger generation
 - Popular websites for young people
 - Facebook / Twitter, etc
- (20%) Young people will be attracted if they perceive amateur radio as being popular with young people
- (10%) Use Special Event Stations
- (10%) Encourage clubs to be more welcoming to newcomers. Recognition for clubs that encourage newcomers
- (10%) Promote activities that cannot be done on the Internet, etc, for example CW, ARDF, DX/SOTA, EME, home construction
- (10%) Courses hard to find and arrange / Why can't training and testing be done online?

Interesting to see that whilst the order and most of the suggestions are the same. Unsurprisingly, this age group trend more to the website and online presence.

To attract newcomers

(Responses from 25 – 50 year olds)

- (33%) Young people will be attracted if they perceive amateur radio as being popular with young people
- (15%) Advertise / publicise more often to the younger generation
 - Popular websites for young people
 - Facebook / Twitter, etc
- (11%) Attract through Scouts , Guides & Youth Organisations
- (10%) Use GB4FUN

No real change with the older age group

To attract newcomers

(other, low scoring suggestions)

- Work out a new USP, being a "learned society" is no longer relevant
- Keep up the good work
- More contact with, and help from, regional reps
- More focus on VHF
- Deal with DQRM/Repeater abuse (both HF & VHF)
- Cheaper membership
- Encompass other radio-related interests (SWL, radio astronomy, etc)

Finally, the “noise”. Just possibly a trend the older age group put cost of membership as an issue – this is at variance with free membership for students (maybe some of the older members are feeling the pinch)

To attract newcomers

(some further comments)

- Improve visibility in schools, universities, Youth Clubs or perhaps run a schools equivalent to JOTA
- Promote the hobby in young people's magazines and Internet facilities such as YouTube, Facebook, Twitter, etc.
- Help Clubs to reach out into their local communities
- Recognition that there are several stages:
 1. Make the hobby sound interesting to prospective newcomers;
 2. Ensure plenty of courses, friendly clubs, lowest possible entry-cost;
 3. Make sure that the current generation of amateurs don't put off the newcomers!

This is a further set of comments, which whilst not the most popular were highlighted during the analysis.

“Anything else” Statistical Trends

- (36%) Improve the website & online presence (e.g. YouTube, Twitter), also archive material (cf ARRL site, also see Southgate site). Be able to update personal membership profile online
- (22%) If PLT and other sources of EMC aren't addressed now, future actions are irrelevant
- (15%) More focus on Emercomms (Public Service?)
- (6%) Better incentive licensing system
- (5%) More information on what the Society is doing (Committee Minutes, GM's blog, etc)
- (4%) Cheaper membership
- (3%) Deal with DQRM/Repeater abuse (both HF & VHF)
- (2%) Keep up the good work
- (1%) Work out a new USP, being a "learned society" is no longer relevant; Encompass other radio-related interests (SWL, radio astronomy, etc)

This was a final “text box” option to catch any issues that had not been covered in the main Questionnaire. Un-surprisingly, many chose to use it to highlight their key concerns.

“Anything else” comments

- Lots of the usual hobby horses (contesting, RSGB is secretive, RadCom not as good as QST, etc.)
- Several mentions of problems with the QSL Bureau
- Quite a few comments focusing on Emercomms yet little comment on Public Service
- Plenty of misunderstandings (e.g. “RSGB spends too much on GB4FUN”) or unrealistic expectations (“RSGB should get antennas exempt from planning control”)

The “tail” with this type of open text question is always going to be long. There is always going to be un-substantiated opinion, but a clear message comes across that we are not good at getting messages across.

To use a metaphor we are perhaps not transmitting as much information as we should – we’re too reliant on a 599 TU type of QSO - and watching the DX Cluster rather than listening...