



Results of ARRL Delta Division Survey of Members, July 2011

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ARRL Delta Division Survey, July 2011

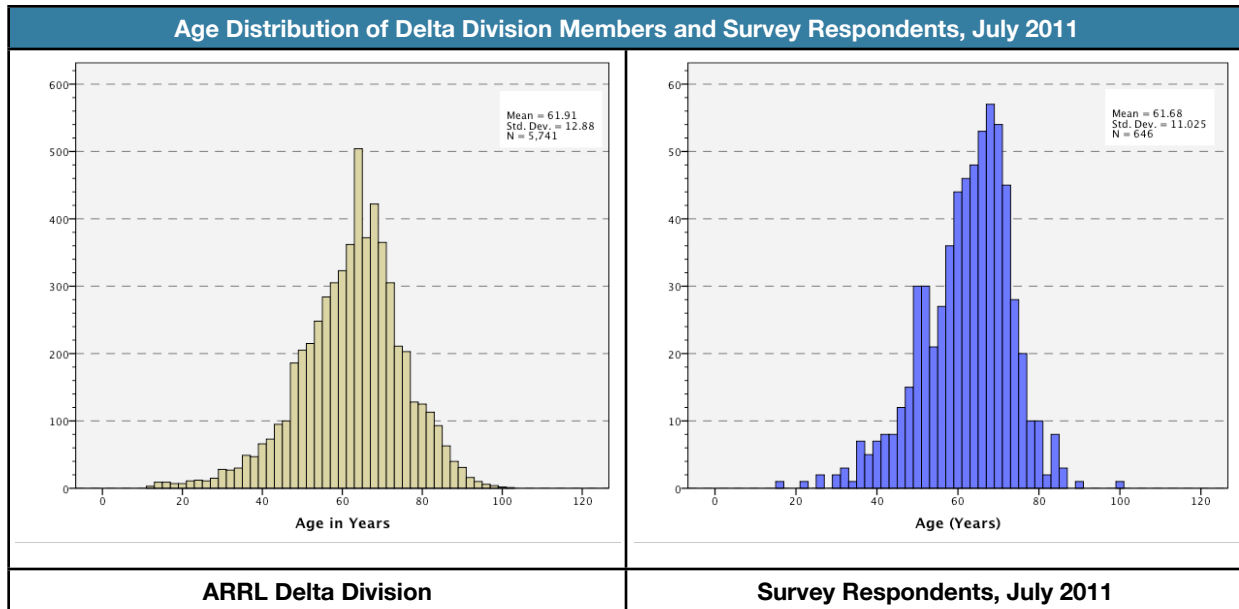
Introduction

The Delta Division of the American Radio Relay League, comprising the state sections of Arkansas, Louisiana, Mississippi, and Tennessee, along with the support of ARRL Headquarters, conducted a survey of League members during the month of July, 2011. All members were contacted through their registered electronic mail addresses and invited to participate by Delta Division Director, Mickey Cox, K5MC. Of the 6,736 members in this Section, a total of 657 successfully completed the web-based survey. This report presents the basic results which focuses on the age and experience of members, their operating preferences and activity, local ham club participation, perceptions of key problems facing the hobby, how the ARRL should best represent them, and specific aspects of the ARRL DXCC Awards Program.

Survey Sample Summary

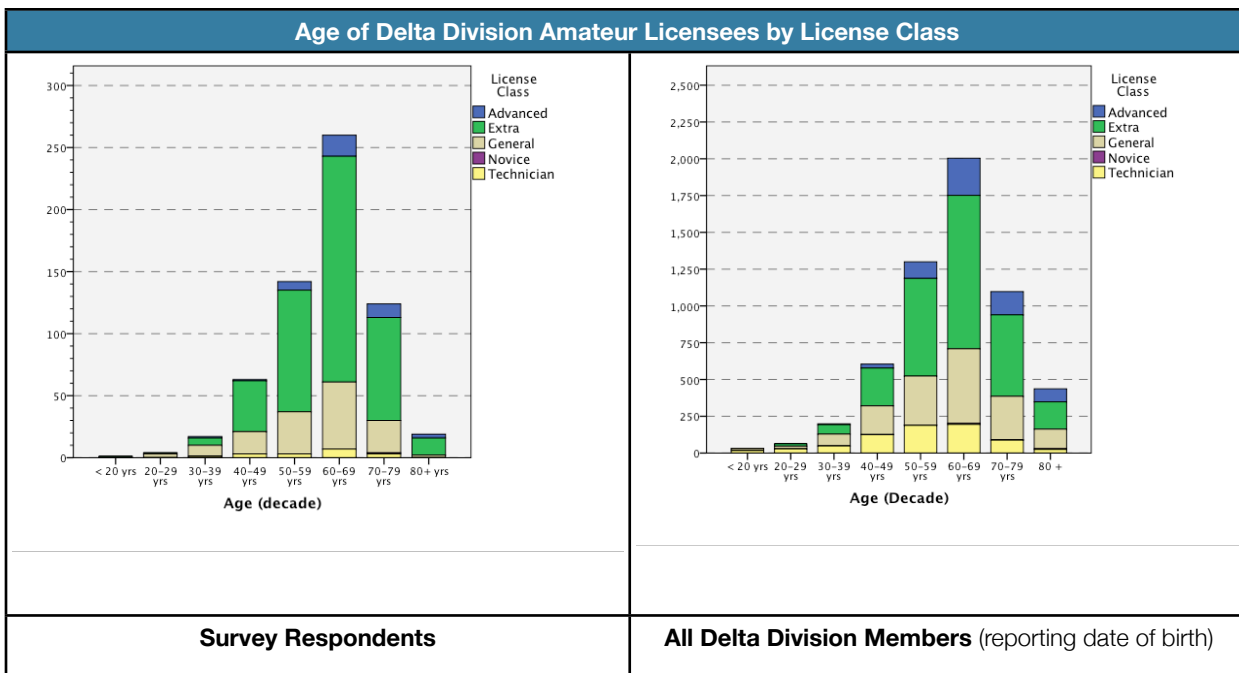
ARRL Delta Division Members	July 2011 Survey Respondents	Response Rate (%)	Section Membership:
N =6,736	n=646		
Median age = 63.0	Median age = 63.0		
1,330	142	10.7	Arkansas
1,288	114	8.9	Louisiana
1,052	111	10.6	Mississippi
3,066	274	8.9	Tennessee
6,736	641	9.7	Division Total
Note: a total of 16 survey members could not be matched to ARRL membership rolls so their state was not determined, making the total survey sample size equal 657.			

In the survey sample summary, the median ages for the population and the actual realized sample was exactly 63.0 years, suggesting that the age structure of the sample survey is highly similar. The response rate for the Division was 9.7 percent. This varied slightly among the four sections from 8.9 percent to 10.7 percent. In the age distribution chart below, the overall age compositions of the population and the sample appear similar.



From other comparisons, the number of survey respondents by age (decade) and license class is shown below. While the two distributions are not exactly the same, the general distribution is very similar.

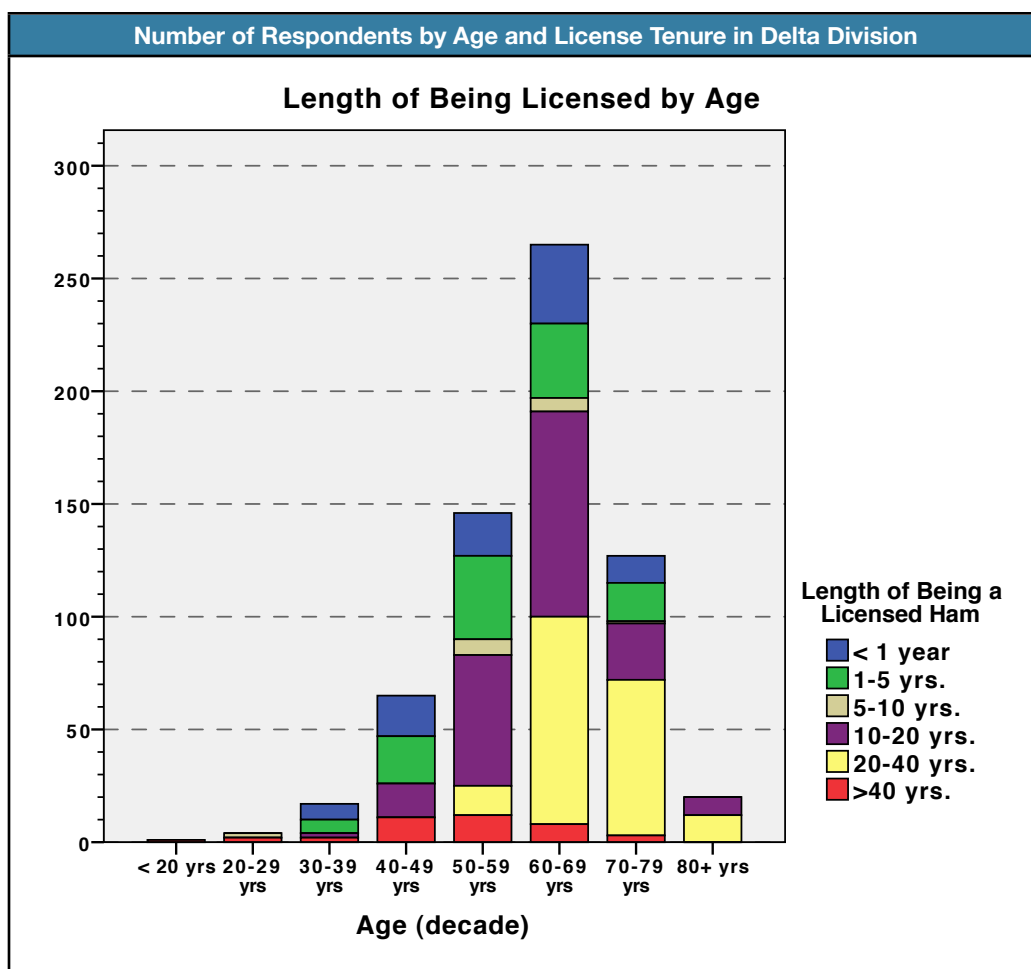
The survey response appears to have a very representative age, section, and license class composition. As with any sample survey, there is error in the representativeness of the data collected, both in terms of sampling error and measurement error. However, in so far as we have ancillary data with which to compare the sample to the population, it appears that it is a viable one.



Age, Experience, and License Class of Delta Division Members

One of the general issues facing amateur radio at the present time is the “aging” of hobbyists practicing the craft. The median age of member hams in the Delta Division is 63 years of age. As shown in the chart above those amateurs in their sixties are the single largest group, regardless of license class. From careful comparisons of this chart, it is clear that the earlier age groups are decidedly smaller. One might interpret this to conclude that the “supply” of young hams is dwindling and threatens the future of amateur radio. Indeed, as our survey data show, Delta hams see this is a major problem.

However, a critical eye to this chart also shows that there are many Extra class licensees coming along from earlier age groups. Moreover, it is important to keep in mind that not all hams are licensed so early in life. We asked survey respondents to specify how long in years they had been licensed. This way, we can dissect chronological age from “age” as a ham. The chart below illustrates the survey responses organized in this fashion.

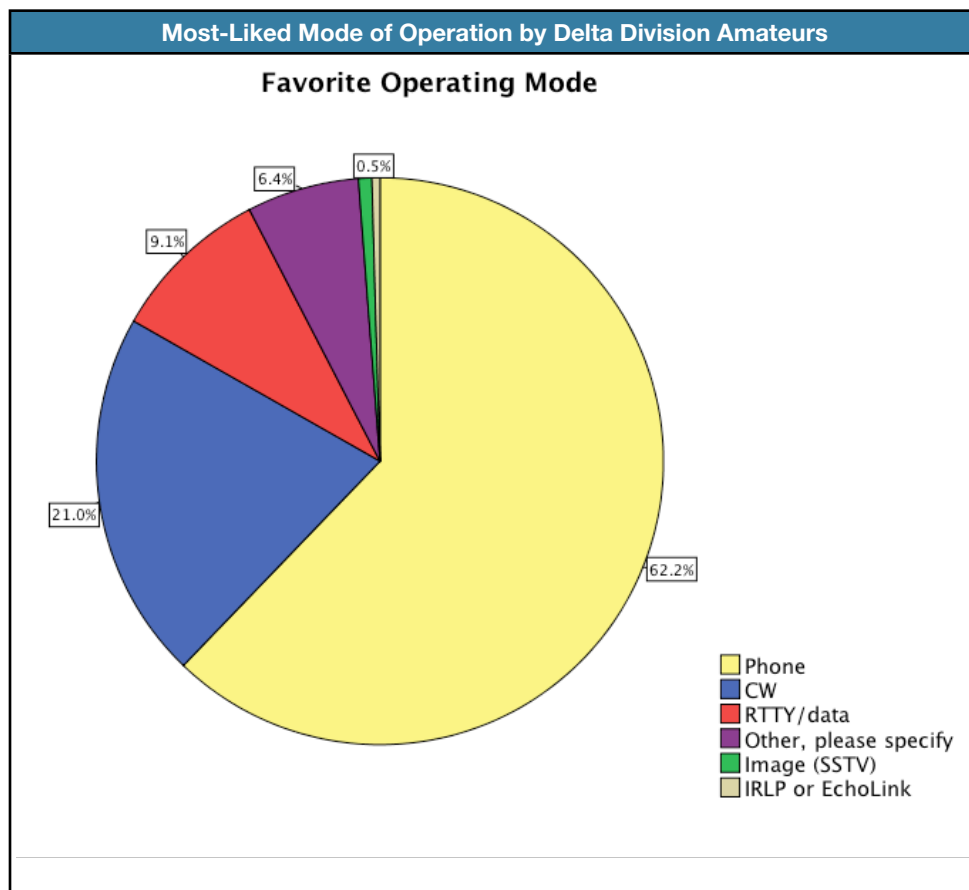


The modal age category remains the decade of the sixties. However, note that only about one-third of this largest group has been licensed over 20 years! About one-third say they’ve had their tickets between 10 and 20 years. The surprising segment of the sixty year-old group is that about a fourth have been licensed 5 years or less. If we examine every age group, a similar pattern, more or less, can be observed.

What these results suggest offsets the gloom felt by many amateur radio operators over the younger generation using alternative technologies rather than getting interesting in ham radio. With the well-known “Baby Boom” entering retirement age, it appears that there is a significant group of “late in life” hams. There are probably many more middle-aged people who have the interest but, for whatever reason, never got licensed. (Perhaps the code requirement was an impediment.) Combining marketing efforts to both teens and the middle-aged might yield great rewards based on these findings in the Delta Division states.

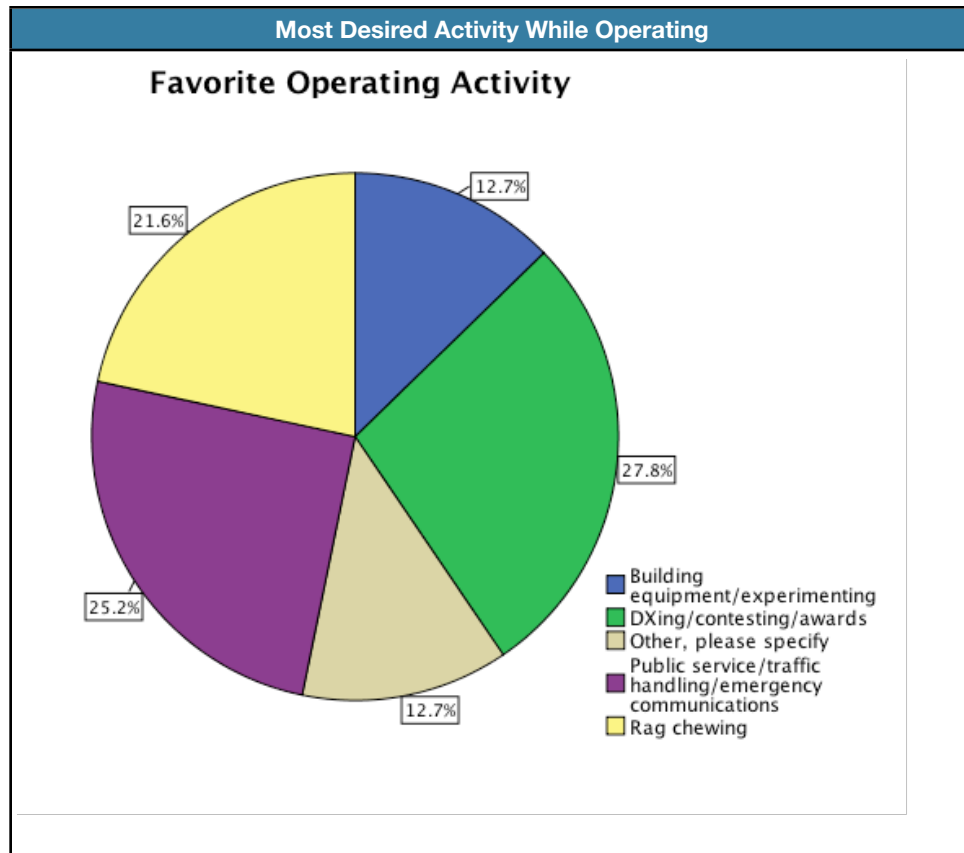
Operating Preferences and Activity

One part of the survey asked about operating practices and preferences. From the chart below, it is clear that phone operation is “king” but CW is preferred by one out of five hams. Data modes, like RTTY and others, are preferred by almost 10 percent (9.1%). The voice over IP (VOIP) modes implemented through IRLP or Echolink are preferred by only a very small segment of hams in the survey.



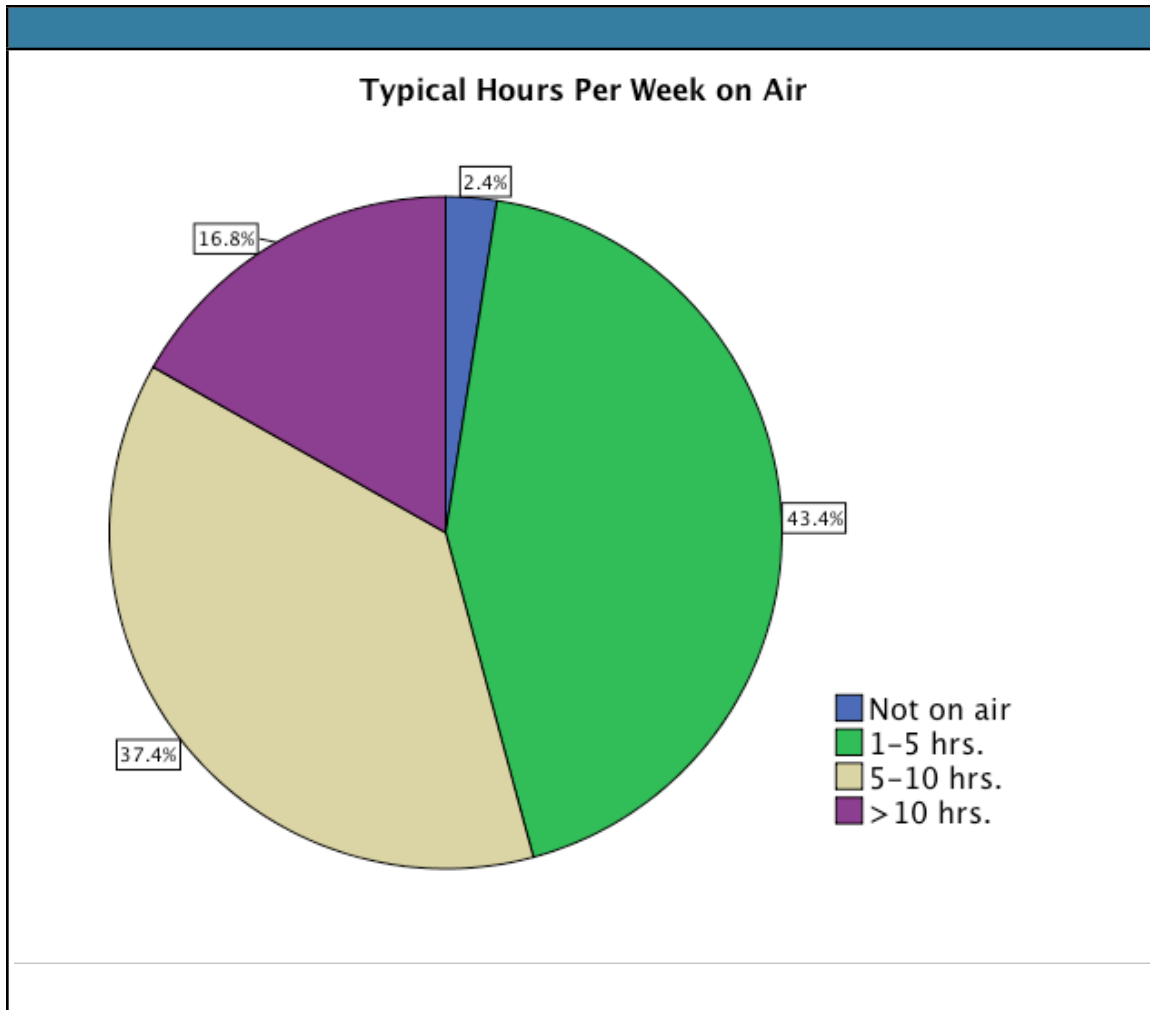
In terms of operating activity, Delta hams reported varied interests. DXing barely tops the list (see chart below) over emergency traffic handling, each with about a quarter of the survey's respondents choosing each activity as their favorite. Rag-chewing is the favorite of one in five operators. Building and experimenting with equipment of one type or another is

avored by about 13 percent. Almost this same percentage (12.7%) favors other activities not directly identified on the survey.

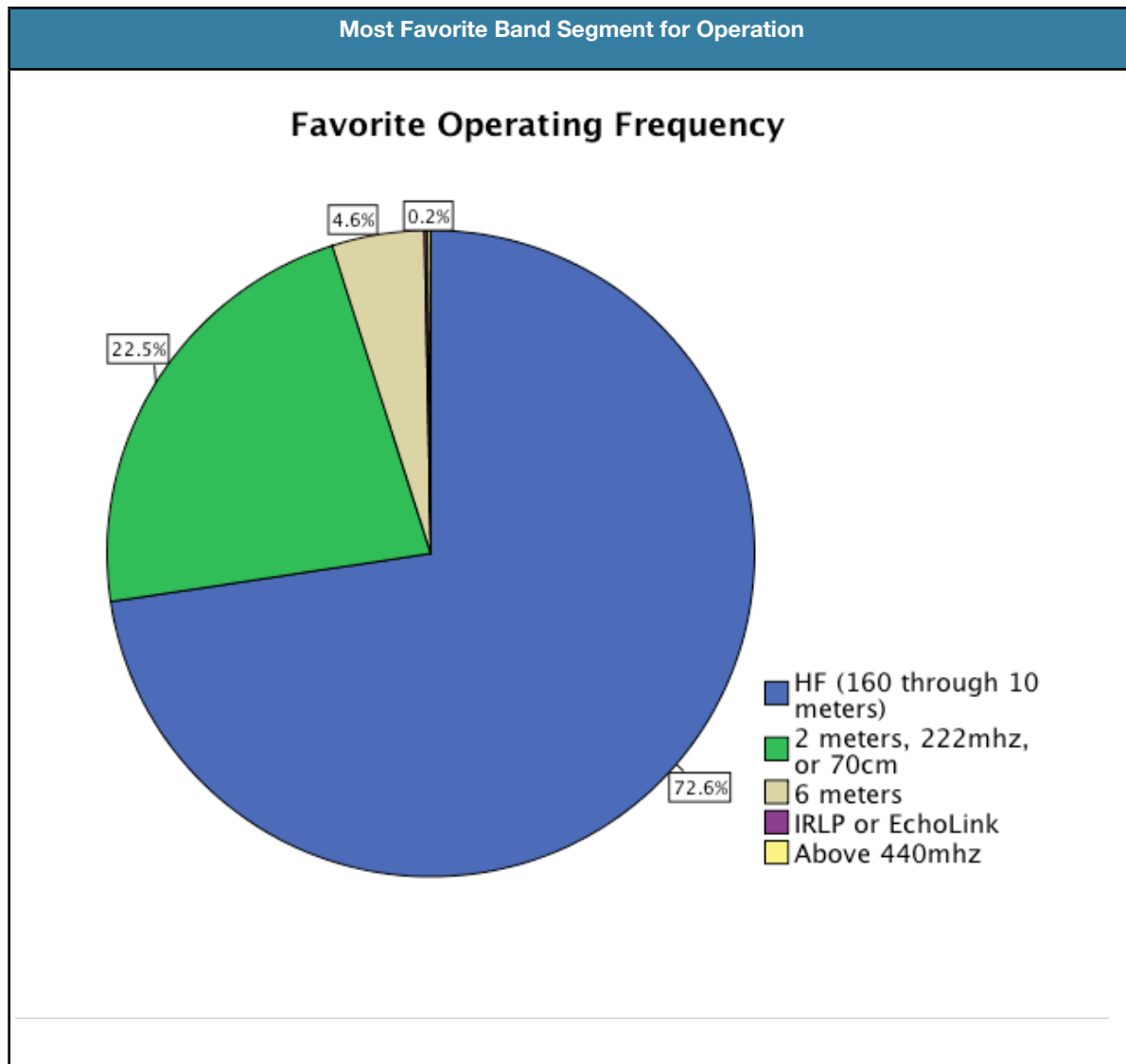


The amount of time spent on the air each week shows that only a small proportion of hams in this Division (2.4%) are *not* active. The vast majority are on the air at least an hour per week. About 40 percent (43.4%) are communicating from 1-5 hours a week. Slightly less (37.4%) are active from 5 to 10 hours while about 17 percent are operating over 10 hours a week.

Although not shown here, the breakdown of operating activity time each week does not vary significantly by age or state but does by license class. Technicians are more likely to operate from 1 to 5 hours per week whereas Extras are more likely to be on the air over 10 hours per week. Hams licensed between 20-40 years were more likely to operate 10 hours or more which was a significant difference. No other patterns were discernible.



The favorite operating frequency of Delta Division amateurs is, by far, high frequency (HF)! While this is not surprising, the magnitude (72.6%) is striking. Operating on the VHF or UHF frequencies is the second most favorite frequency bands identified in the survey. With the budding improvement in the sunspot cycle, six meters was the favorite of a small proportion of aficionados of what is often-called the "Magic Band" (4.6%). Above 440 mhz or using VOIP modes barely registered with these survey respondents.

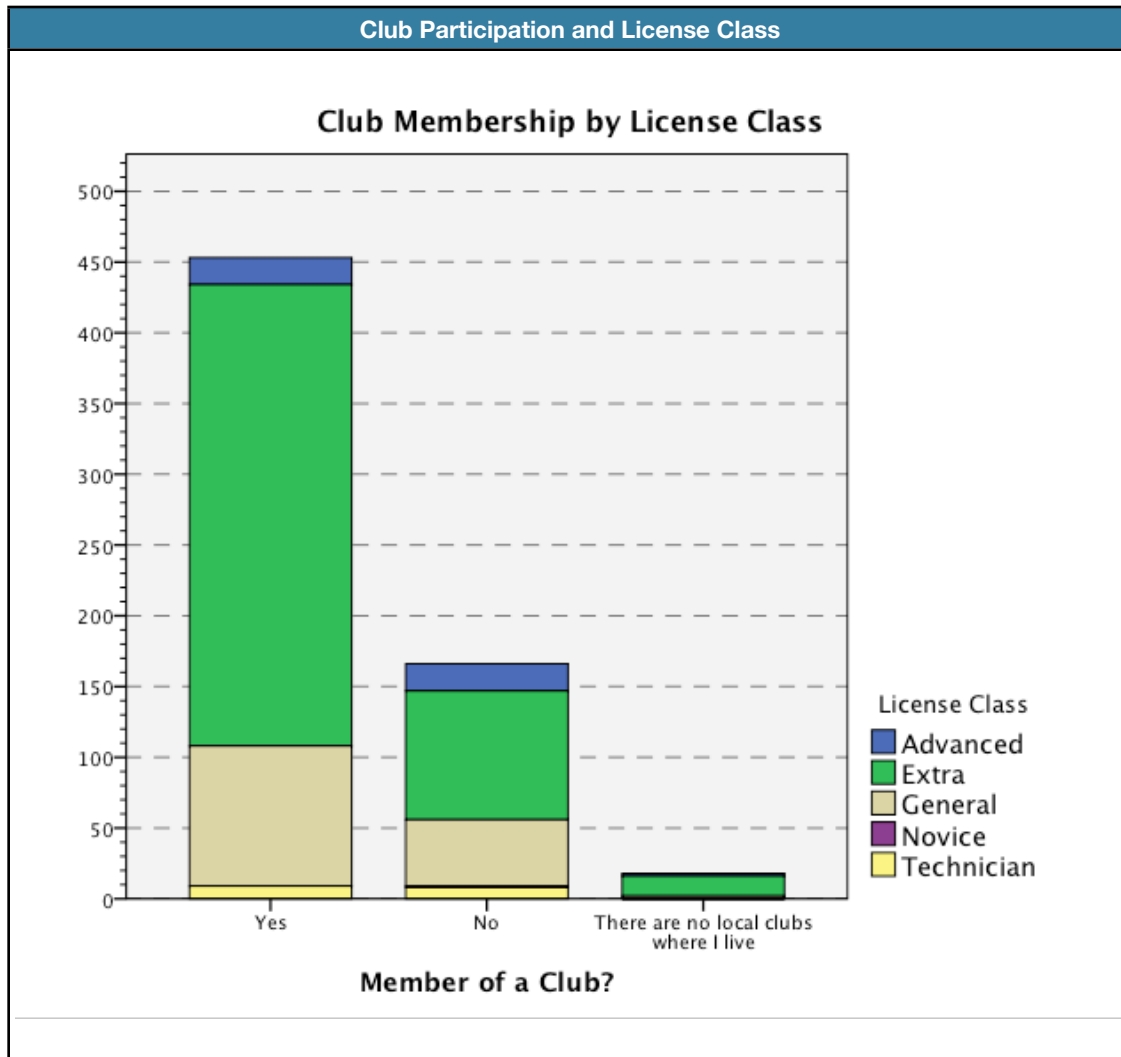


Club Participation

Local amateur radio clubs are a vital aspect of the ham radio experience. As anyone reading the literature, websites, or blogs on the Internet can attest, they can also be troublesome to the individual ham enthusiast for a number of reasons. The level of local club participation in the Delta Division is fairly high (71.2%). There are only 2.8 percent of the respondents in our survey who indicate that there are no clubs nearby for them to join. About a quarter (26.0%) say they are not members of one or more local clubs in their areas.

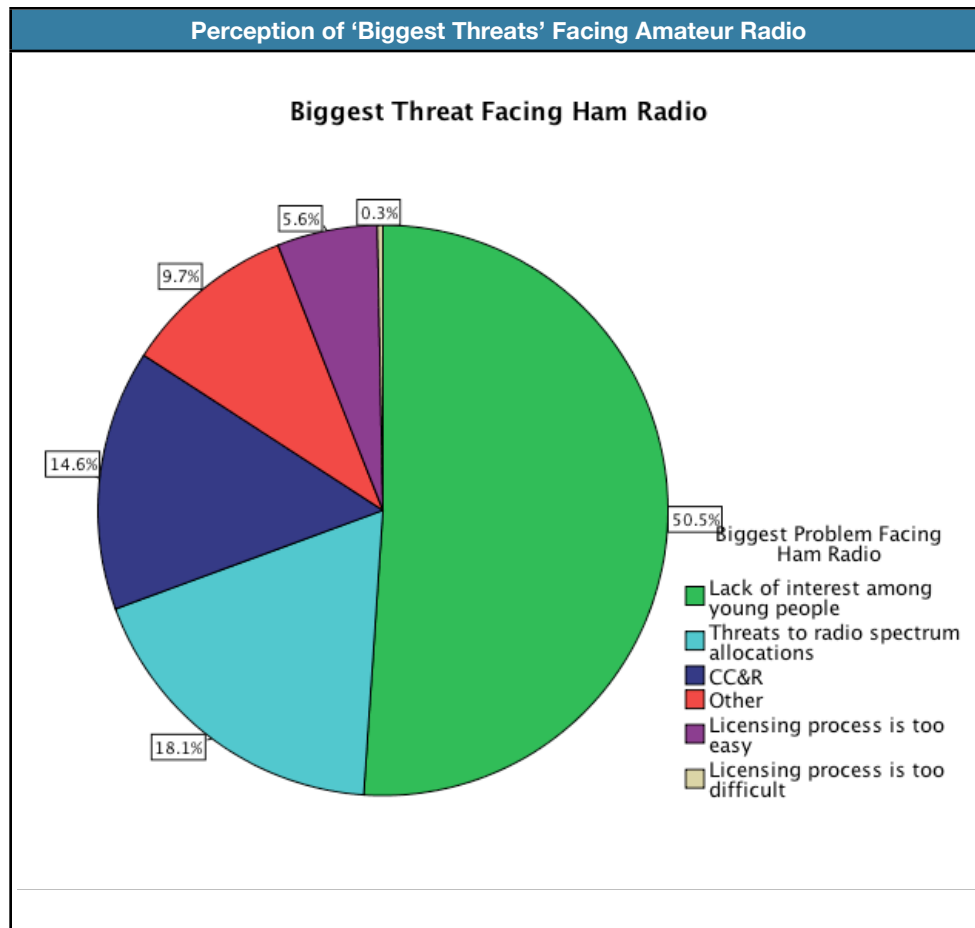
To some degree, this varies by license class rather than age, license tenure, or state. The latter three factors had no significant relationship with club membership. However, investing in achieving the highest license classification---the Extra---is related to a greater probability of being in a local Club. As shown in the chart below, of those currently in Clubs, most hold the Extra license, followed by General class licensees. From reading the comments to this question for those not members of a local Club, the small number of Technicians in amateur radio clubs tend to be members of Emergency

Communications groups such as ARES. On the other hand, many comments were made about social issues in club operations such as cliques managing them, general conflict, poor leadership, and little educational activities being held by clubs. Thus, these results suggest that while Extras are the “backbone” of Club membership, efforts towards greater openness, more professional leadership development, and practices which reduce intra-group conflict would yield great benefits.



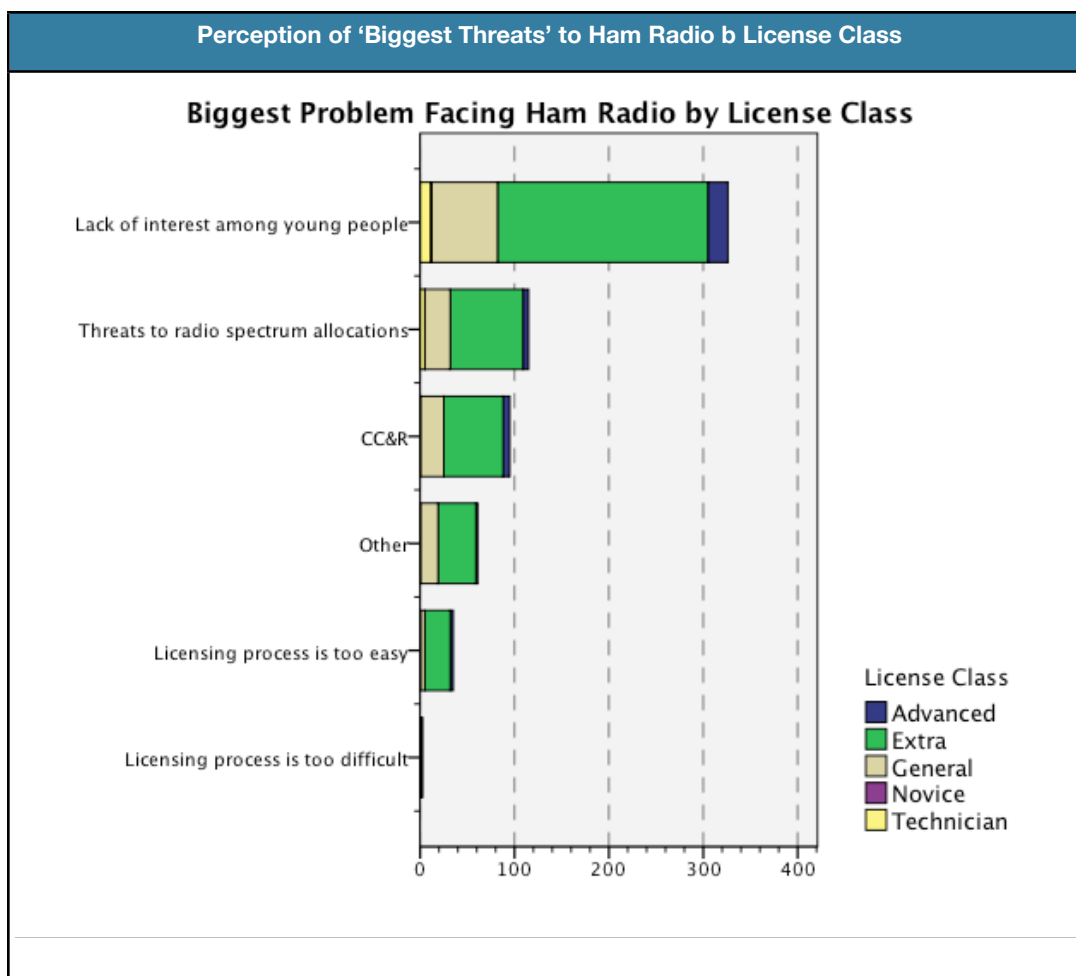
Perceptions of Amateur Radio Issues

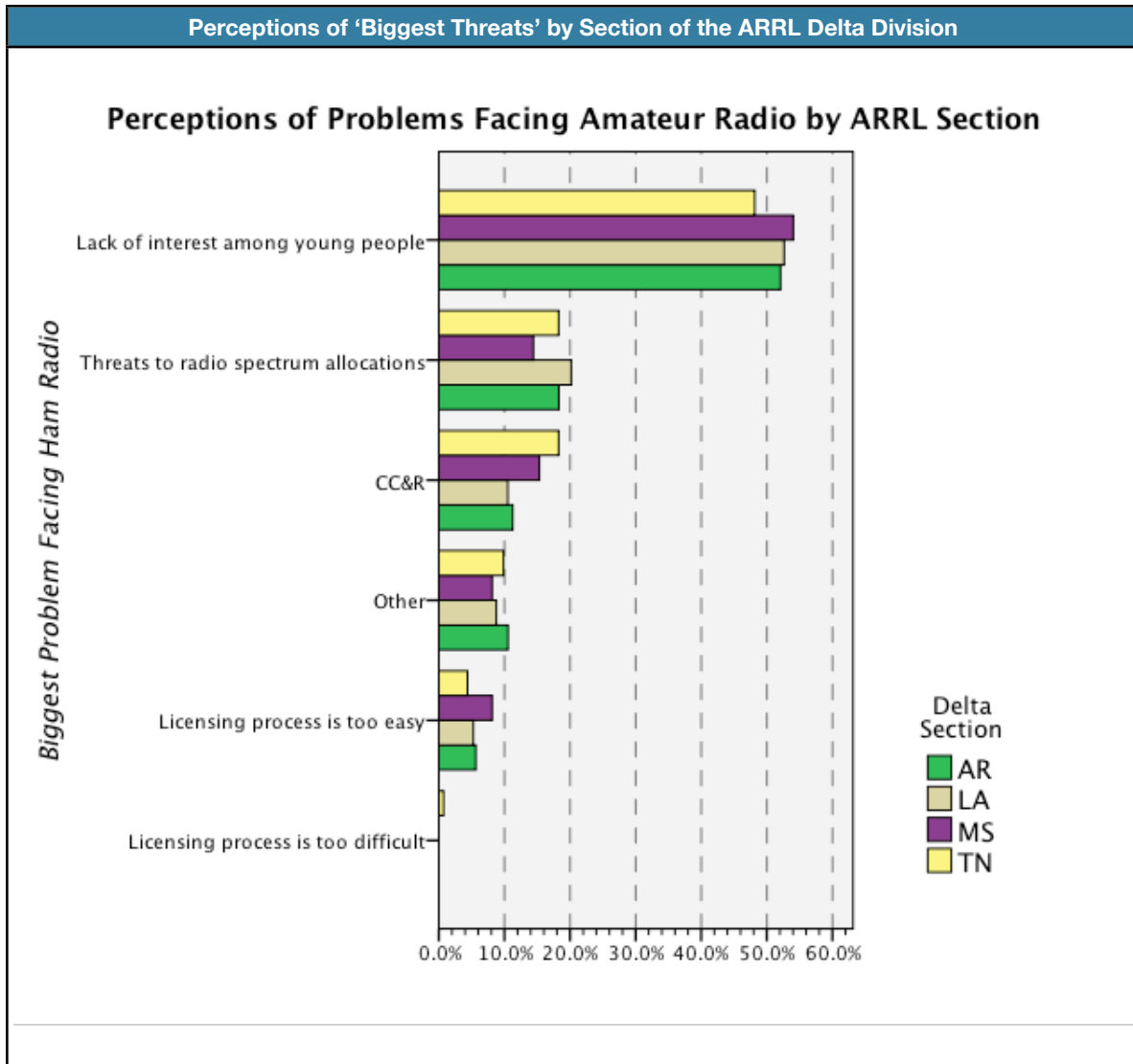
Delta hams clearly believe that the greatest threat facing amateur radio is the lack of interest by young people. Of the six potential threats listed, with one being “other,” fully one-half (50.0%) identified this as the top threat. A distant second was threats to reallocation of the ham radio frequency spectrum to other uses (18.1%). Problems associated with residential neighborhood “covenants, conditions & restrictions” typically governed by home owners associations was a close third (14.6%). These CC&R’s typically restrict the installation of conventional antennas, especially of the Yagi beam and tower style. Many CC&R’s explicitly state prohibitions of receiving or transmitting “aerials”. Threats other than those listed came in fifth (9.7%). The issue of license exams being too “easy” was seen as the top threat by a small proportion (5.6%) while exams being too “hard” received less than a single percent response.



There seemed to be little difference among different amateur groups in these perceptions although license class was an exception. The chart below illustrates that the lack of youth entering the hobby is seen as a greater threat by Extra class licensees than others but this is also the top threat among all license classes.

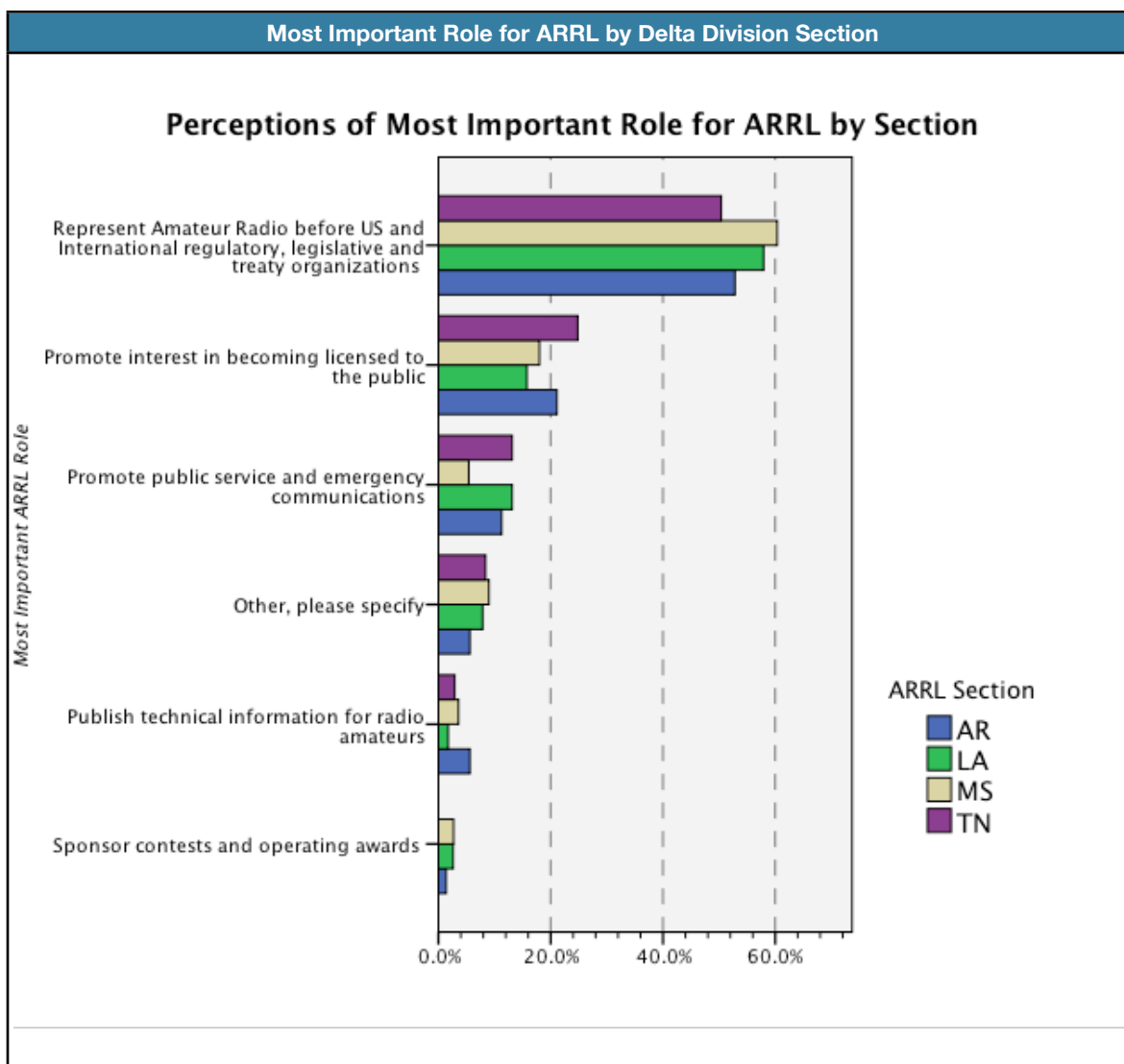
Finally, due to the importance of this question, a breakdown of these perceptions by Delta Division Section is also shown below. It is clear that within sampling error each Section's members view these potential threats about the same.



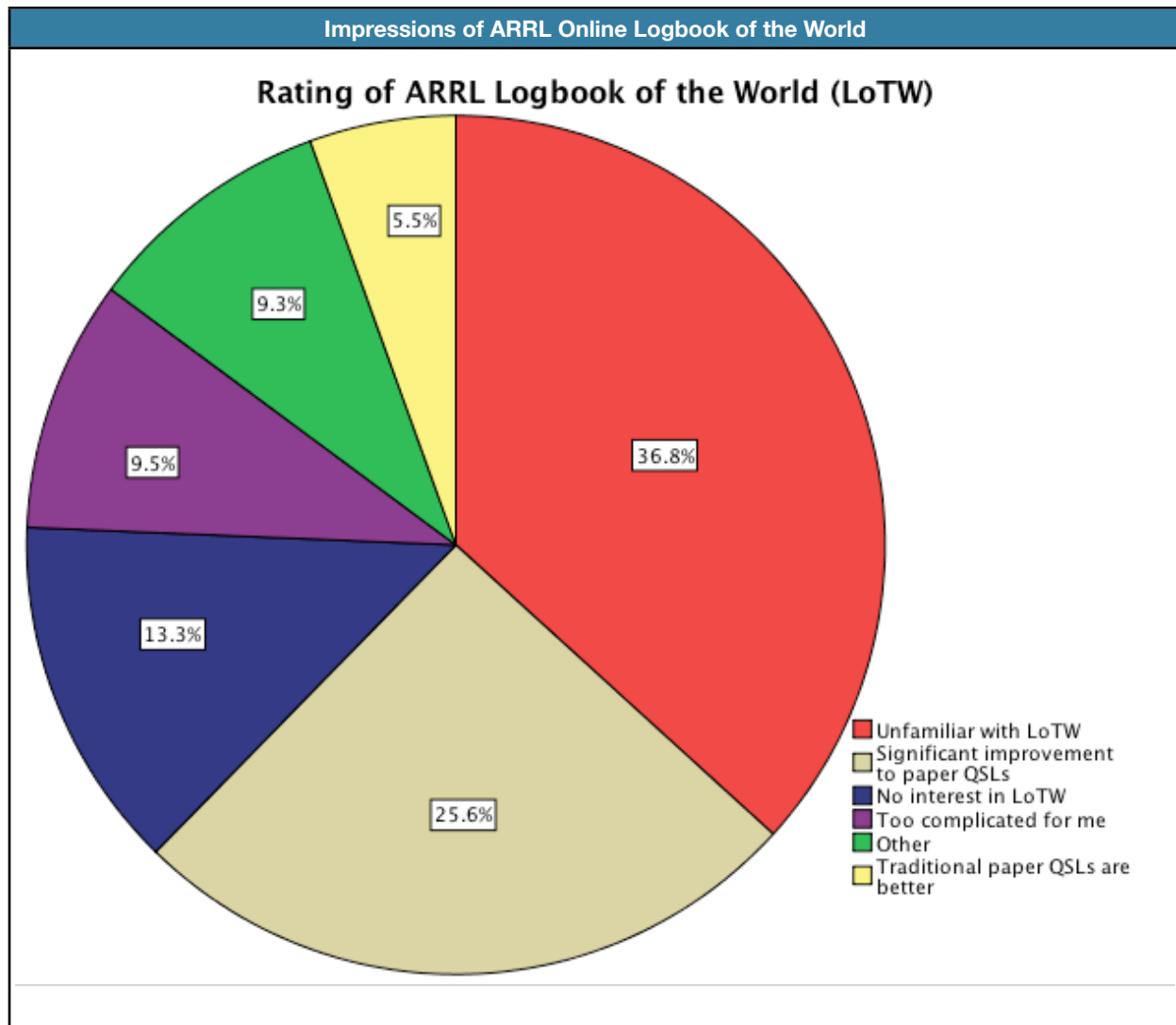


ARRL Priorities

The ARRL is the national association for amateur radio and the major lobbying organization for the hobby. We asked survey respondents to identify the most important role for ARRL. The results of this question is shown in the chart below. It is clear that Delta hams positively sanction the national representative and lobbying function that ARRL plays as its central mission. All four sections in the Delta Division agreed that representing amateur radio both nationally and internationally is the most important thing that the League can do (between 55 and 60 percent). A distant second most important activity (at about 20%) is the promotion of interest in amateur radio by the public. Facilitating emergency communications is third, at about 15%, while factors not explicitly listed ("other") is fourth at about 10 percent. Promoting technical excellence through publications programs and facilitating awards programs come in fifth and sixth in importance but with negligible identification as the *most important* priority for the League.



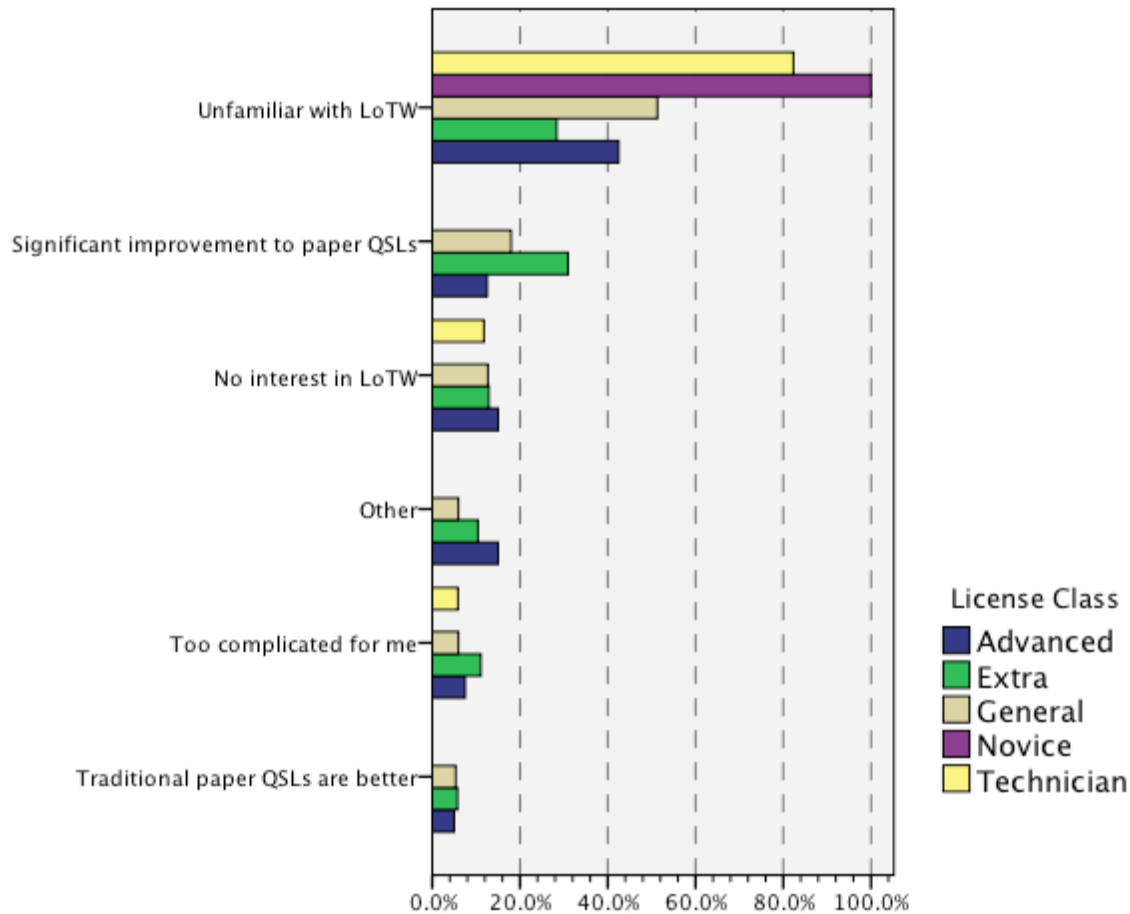
Turning to some of the programs that the ARRL has developed, the new online logbook service, the Logbook of the World (LoTW), survey respondents were asked for their impressions of it. The results are summarized in the chart below. Not surprisingly for a relatively new effort, over one-third (36.8%) said that they were unfamiliar with LoTW. One-quarter (25.6%) felt that it was a major improvement over traditional paper QSL exchanges. In contrast, only a small percentage (5.5%) indicated that paper QSLs were better. Another small group (13.3%) just have no interest in LoTW. About nine percent (9.5%) said that this electronic logbook exchange was “too complicated” for them. A similar number (9.3%) had other impressions of this service.



These program impressions do vary by the ham's license class. Shown below, this chart identifies Extra class hams as having more familiarity and a more positive impression ("significant improvement") of LoTW than other classes. Technicians are less familiar with this online service.. A small group of Extras also say that it is too complicated.

This program appears to need more promotion and training to successfully reach a broader segment of ARRL members in the Delta Division. The license class differences just reported do not indirectly represent age or license tenure (results not shown) but perhaps the approach that those amateurs investing in the highest class license (Extra) take to the hobby. Repeating this survey at a later date will tell us more about how the ARRL's promotion of LoTW is working.

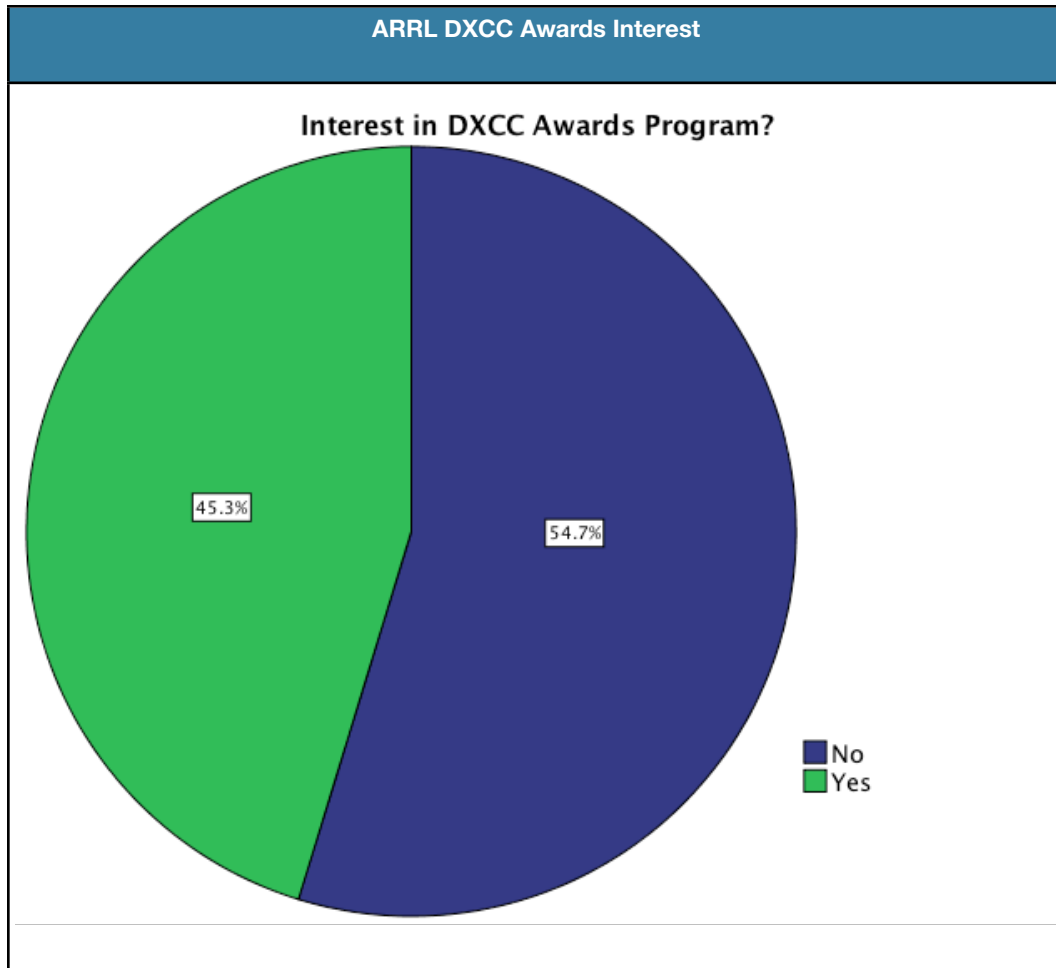
Opinion of ARRL Logbook of the World (LoTW) by License Class

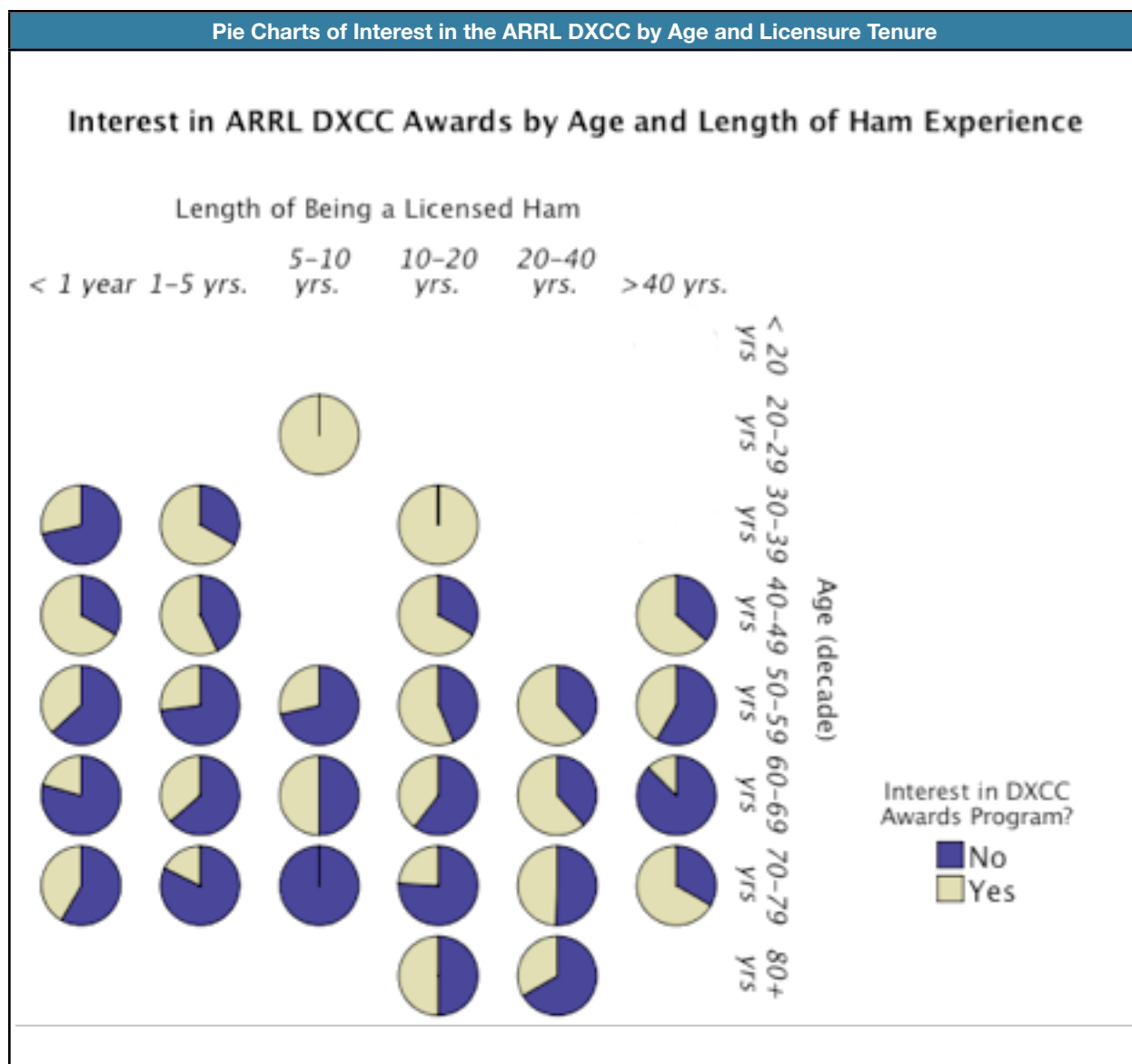


DXCC Awards Program

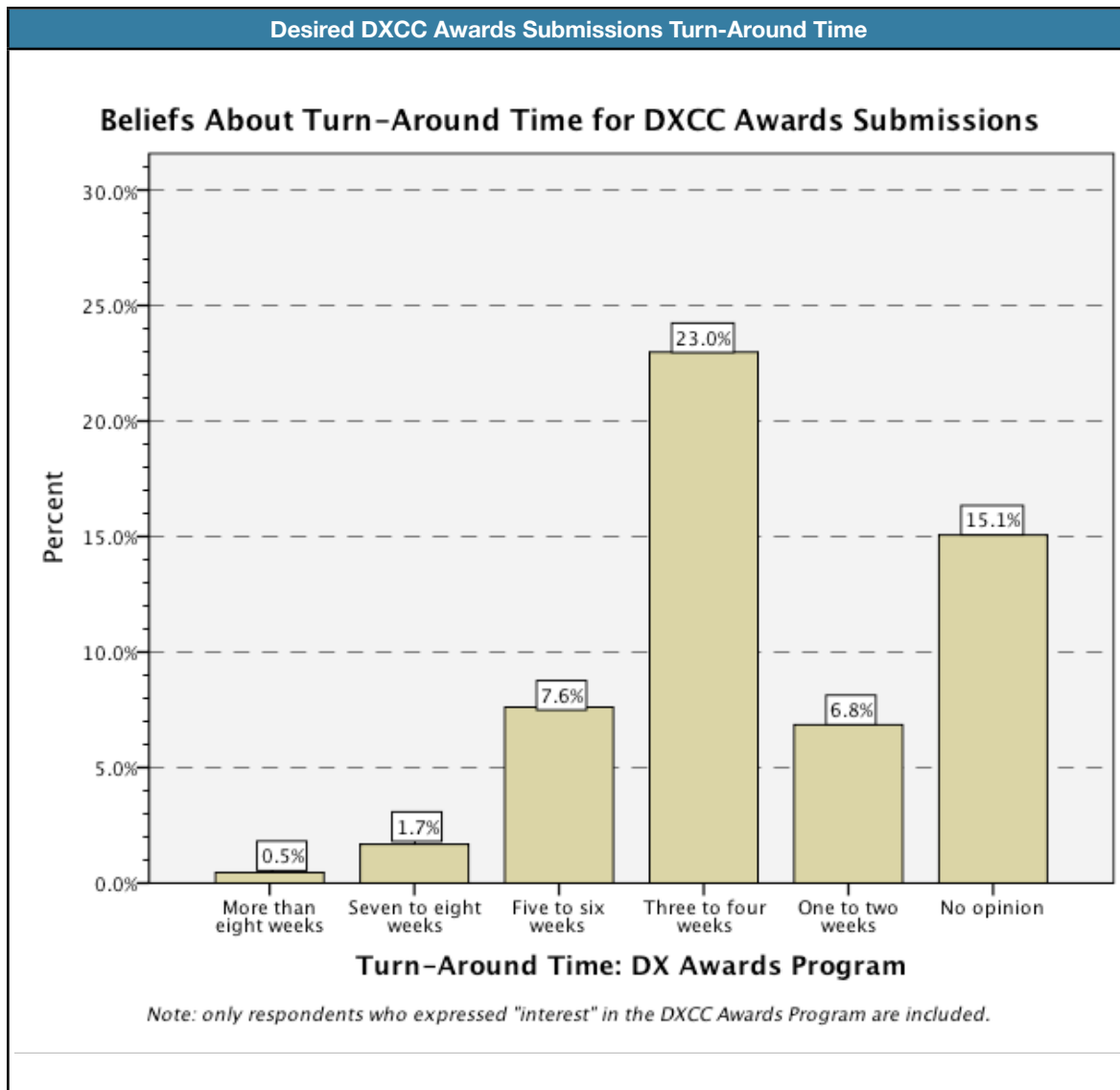
One of the most important awards programs sponsored by the League is the DXCC Awards. Over one-half of the respondents (54.7%) have an interest in this program. This represents a distinctive “split” in terms of interest but perhaps no more than the favorite operating activity also measured in this survey.

Interest in the DXCC varies by age and license tenure as shown below. This chart needs some explanation. Basically a pie chart, like that just discussed, is presented for each category of “age” and “length of being a ham” (i.e., tenure of license). Those older and longer-tenure amateurs have the greatest interest in the DXCC program! Some older hams who have shorter license tenure also have very high interest. These results show that there is an age cohort effect in terms of chasing DX as organized by the ARRL’s DXCC Program. An implication of this finding is that younger, less experienced hams may need to be targeted (“marketed”) to regarding this program.

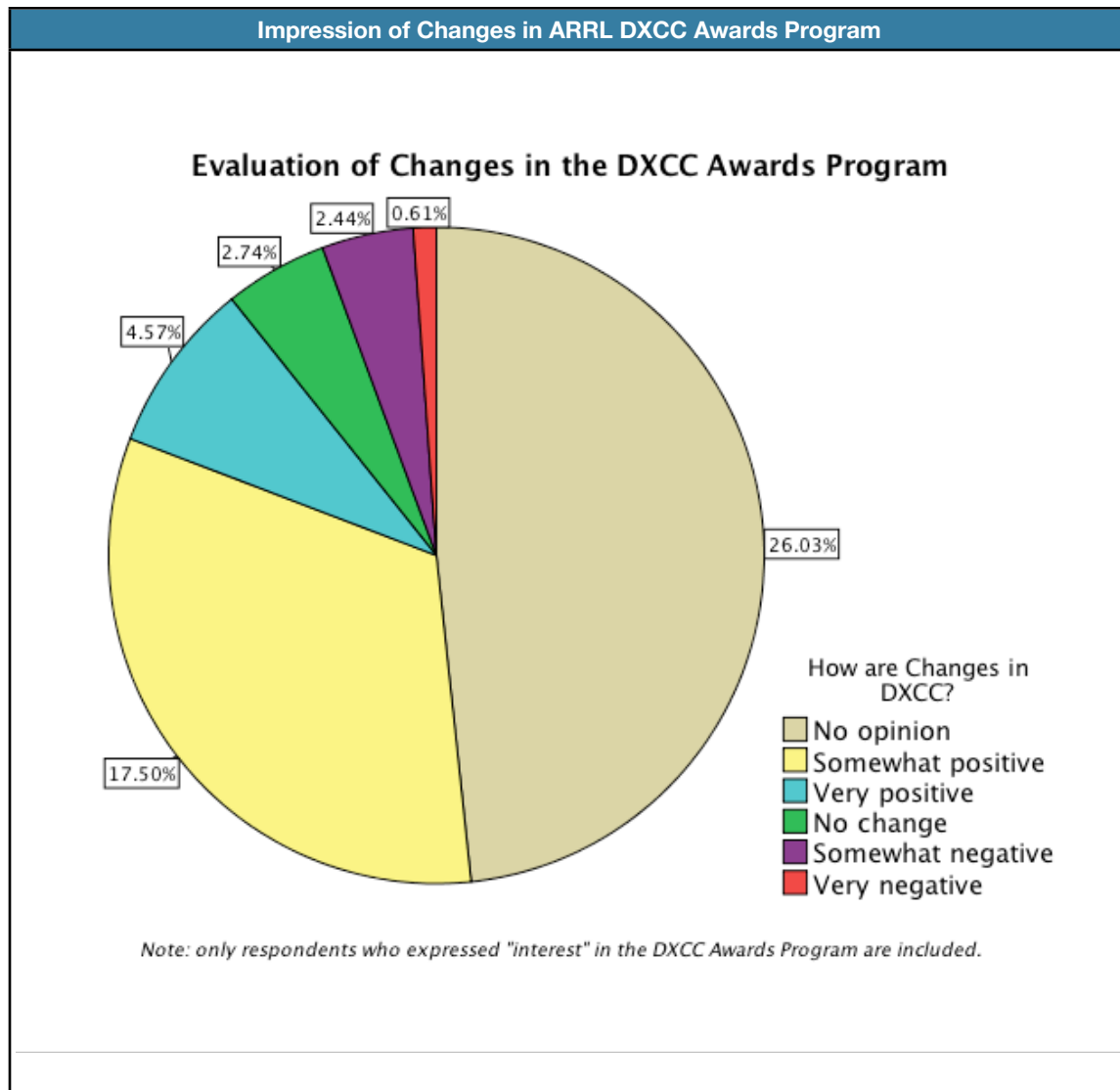




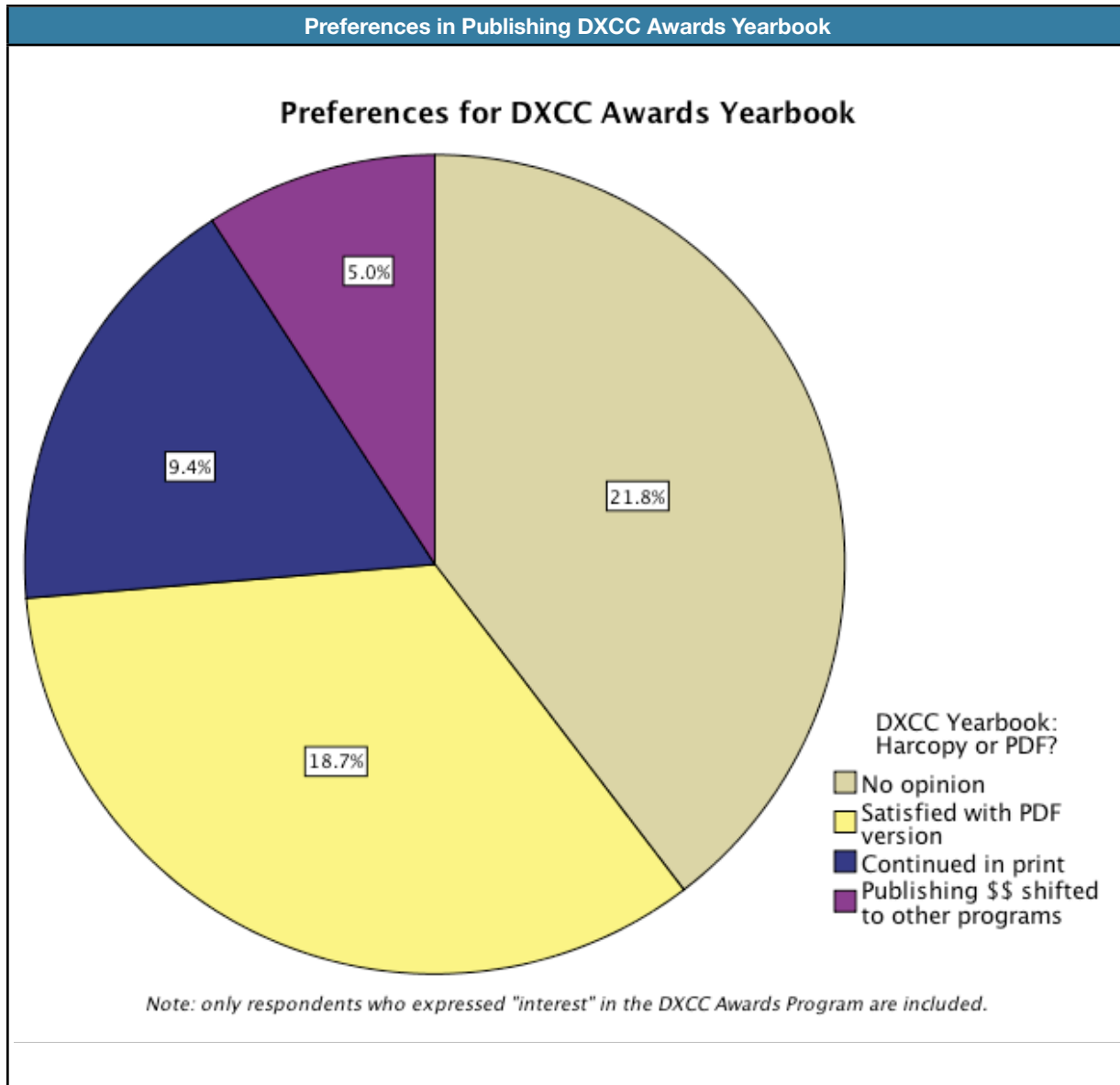
We also asked about Delta Division hams' beliefs regarding the lag-time between DXCC "work" for submission and the announcement of the awards themselves. Shown in the chart below, The modal choice (23.0%) is three-to-four weeks followed by "no opinion" (15.1%). The other options, both longer and shorter turn-around periods, reach no more than half this level of support. Thus, the fairly clear desired time interval for review, validation, and announcements is roughly one month.



The League has made changes to the DXCC program over the past few years. Respondents who indicated an “interest” in the DXCC Program (see above) were asked about their beliefs regarding these changes. The results are somewhat surprising. The modal category is of “no opinion” (26.03%), suggesting that many DXers are not very aware of the changes or that they have not directly affected their behavior in awards contests falling under this program. A smaller percentage (17.6%) reports a “somewhat positive” or a “very positive” (4.57%) impression of these changes. Either negative categories, taken together, represent no more than five percent of the respondents.

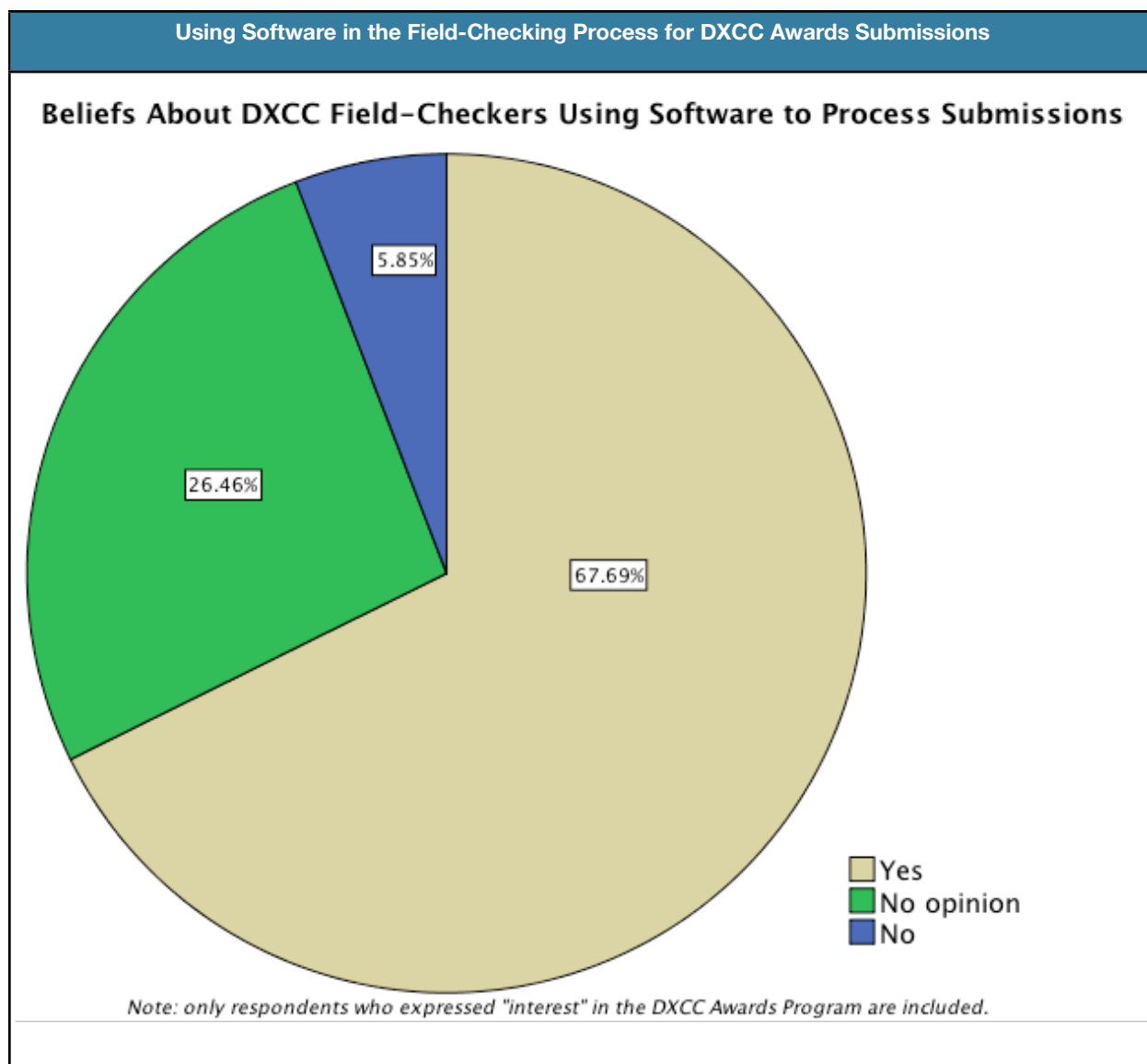


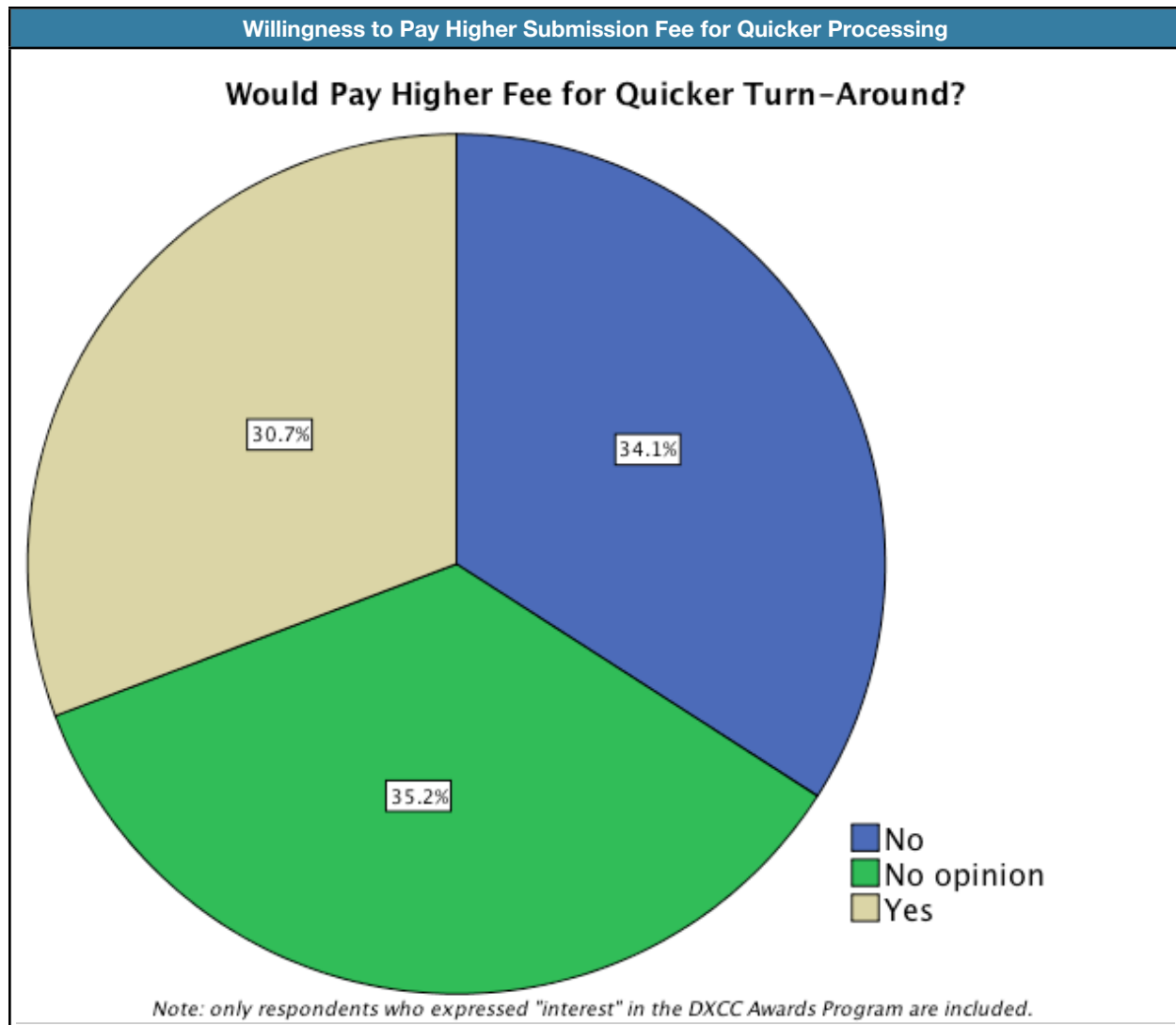
The cost of publishing the annual DXCC Awards Yearbook is an issue facing the League. Electronic publishing is one possibility to streamline this process. We asked respondents for input on this issue. The results are shown below with similarly surprising results. The highest category was once again "no opinion" (21.8%). A smaller percent (18.7%) thought the Adobe Portable Document Format (PDF) version would be acceptable while nine percent would opt for the printed edition. Five percent of the respondents felt that any monies saved from changing to electronic publishing should be shifted into other ARRL programs.



One strategy to streamline the DXCC Awards submission process is for “field-checkers” to use software to conduct the checking of submissions. Survey respondents were very solidly (67.6%) behind the adoption of a software-assisted approach. About six percent (5.85%) were against this change while about a fourth (26.46%) had no opinion.

The cost of such a move by the ARRL is a consideration. We asked respondents to evaluate whether they would adopt higher submission fees to offset the cost of the software. These results, shown below, reveal very different opinions. Each response, from the positive “yes” to the negative “no” to the neutral “no opinion,” obtains one-third support. We note that these responses are only among those who expressed interest in the DXCC Awards Program.





Summary

This annual survey of Delta Division members focused on the experience of amateur radio operators in the region, their preferences for operating, how the ARRL should represent them, and various programs initiated or sponsored by the League involving DX operations. The results are highly informative in the following ways.

The “graying” of ham radio is certainly evident in the Delta, exacerbated partly due to the retirement-destinations present in the states comprising the region. The modal age for licensed amateurs who are ARRL members is 63. The analysis of ARRL membership information and the survey responses together shows several important demographic trends besides the well-known aging pattern. One, there are advanced licensees (Extras) at very young ages which suggests a life-long commitment to the hobby. Two, the phenomenon of “late-in-life” hams was detected when chronological age was cross-classified with length of holding the amateur license (license tenure). About one-fourth of all hams in their sixties say that they have been licensed five years or less. Over half of this age group have held their licenses less than twenty years. Somewhat similar patterns hold for older and younger age groups. The implication of this demographic result is that the

market for “new” amateurs coming into the hobby is great amongst the Baby Boom generation. This is in addition to the teen-oriented education programs already in place by the ARRL.

Operating preferences and activities shown little surprise in this survey. HF phone operations, whether chasing DX, rag-chewing or handling traffic, is still “king”. This varies by license class, of course, as does the time spent on the air each week as long-term Extra Class licensees tend to be on the air more often than others. Nonetheless, about a quarter of the hams in this survey indicated that VHF/UHF are their favorite bands for operating, regardless of specific form of activity. Data modes are the favorite of about one in ten hams. VOIP modes (IRLP, EchoLink) are a very small fraction of the favorite band vote. While folklore complains at times about the “large” number of licensed amateurs who do not operate, the survey results estimate that this is no more than 2-3 percent of the hams in the Delta Division.

The level of local club participation in the Delta Division is fairly high as almost three-fourths say they are members of at least one (71.2%). Fewer than three percent indicate that there are no clubs nearby for them to join. About a quarter (26.0%) say they are not members of one or more local clubs in their areas. The open-ended comments regarding why they are not members of local clubs (where present) suggest that it is ineffective leadership that is the underlying reason (e.g., no program activities for learning, intra-club conflict, social cliques influence club activities, exclusion of new members, etc.). The ARRL should consider programming to develop better and more sustainable club leadership. This effort will have spill-over effects to other beneficial outcomes, such as new amateur recruitment, public education about amateur radio and emergency communications, as well as education about ARRL initiatives and programs (DXCC Awards, LoTW, etc.).

Even with the demographic results described above concerning “late in life” hams, the clearest perceived threat to the hobby is the relative lack of interest in amateur radio among young people. This was viewed as more important than frequency band reallocation, restrictive covenant neighborhoods, or the licensing process.

By far, the most important priority for the ARRL is to represent amateur radio to national and international bodies. A distant second role for the ARRL is the promotion of amateur radio licensing to the public at-large.

These survey results suggest that the ARRL DXCC Awards Program is of interest to about half of the Delta Division membership. These members tend to be longer-term members holding Extra Class licenses, what some might call the “old guard” of DXing amateurs. The DXCC Program probably needs further marketing to shorter-term members. However, it appears that one month is the desired turn-around interval for the program. Changes in the DXCC Program are not well-understood among many but, for those who are aware (one-third), they are seen as positive moves by the League. The investment in using software to assist field-checkers in DX contact submissions is viewed very positively. About one-third would favor paying a higher submission fee to support the software investment while another third are undecided. The potential cost-saving alternative of electronic publishing of the annual Yearbook would be well-received by most Delta hams with the shift in cost-savings to other League programs.

The Logbook of the World (LoTW) service recently offered by the ARRL also needs marketing and educational efforts. Many members in our survey indicate a lack of familiarity with LoTW but a significant group finds it a significant improvement over traditional paper QSL exchange methods.

In conclusion, these survey results tell us more about amateur operators in the Delta Division who are members of the ARRL. They should be studied as guidance for policy efforts and continued on a periodic basis using the inexpensive web-based implementation through ARRL Headquarters.