

PUTTING DEMOGRAPHIC STATISTICS TO WORK FOR YOUR AIR SHOW BUSINESS

Every other year since the mid-1980s, ICAS has conducted an extensive survey of air show spectators.

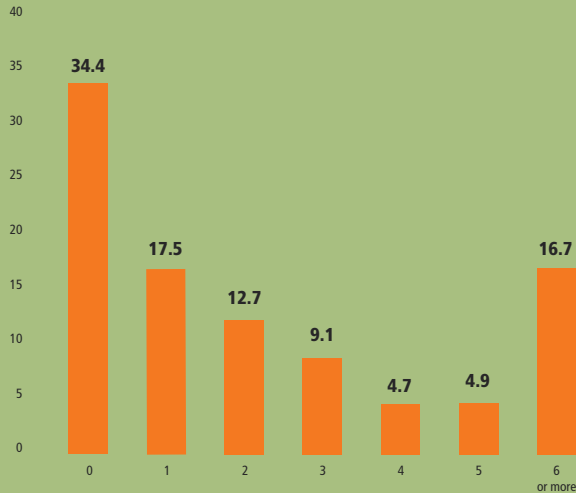
In 2014, a total of 2,001 spectators at 14 different air shows held in the United States and Canada between May and November were queried. From Abbotsford, British Columbia to Stuart, Florida and from San Diego, California to North Kingstown, Rhode Island, adult spectators answered a series of 18 questions about their age, household income, education and impressions and opinions about the air shows.

The results, summarized in the next several pages of this issue of *Air Shows Magazine*, paint a clear demographic picture of North American air show audiences that is consistent with similar research done by ICAS during the last three decades.

Perhaps more importantly, the information provides ICAS members with an invaluable resource to use in promoting their events, soliciting sponsorships and presenting – for whatever reason – a clear and compelling statistical picture of exactly who attends air shows each year in the United States and Canada.

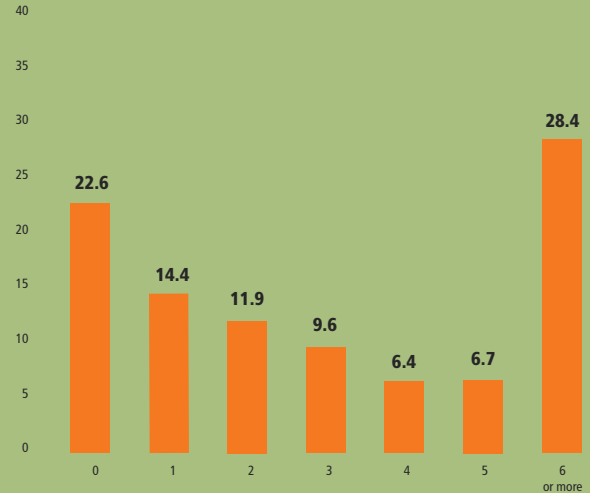


How many times have you previously attended this particular air show?



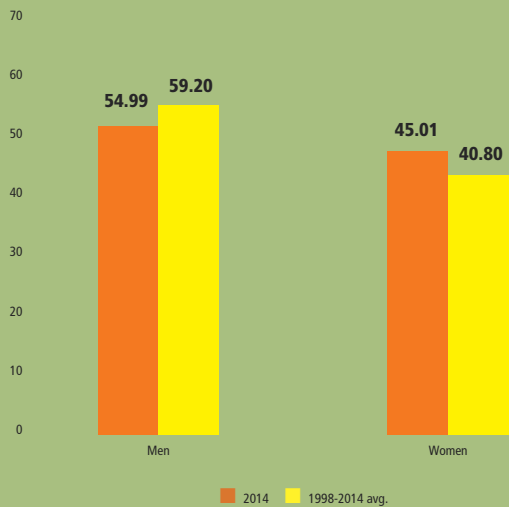
More than a third of all air show spectators were attending the shows at which they were surveyed for the first time. Nearly a quarter were attending their first air show of any kind.

How many times have you previously attended any air show in any location?



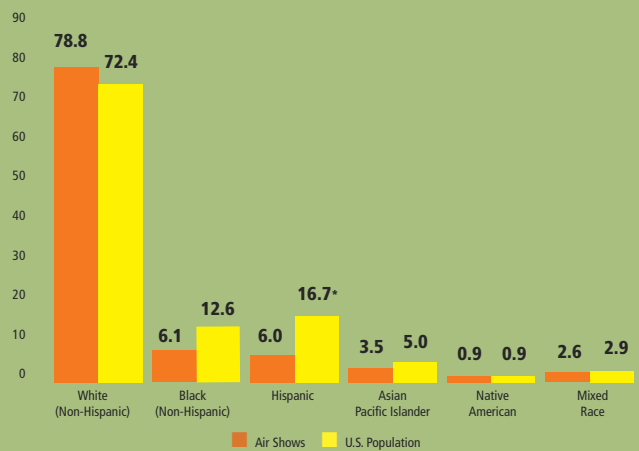
For event organizers, it's important to recognize that – in any given year – an average of 22 percent of the audience will be coming to their first air show when they attend your event. That should impact not just your marketing and promotion, but your programming, narration and other logistical considerations. The future air show attendance of that 22 percent is in your hands. Give them a positive and exciting first experience.

Gender of Air Show Spectators, 2014 vs. 1998-2014 Average



The gender make-up for North American air shows has been remarkably consistent during the last 20 years, and more balanced than traditional sporting events which typically have a much higher percentage of males. In 2014, air show audiences were even more balanced than normal.

Spectator Ethnicity, 2014 Responses vs. General Population (U.S.)

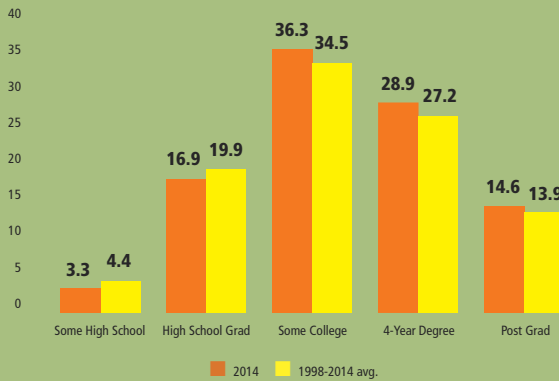


Air shows are not ethnically diverse. Our events attract a higher percentage of whites than the general population and a smaller percentage of Hispanics and blacks.

* Importantly, the figures for the general population include some double-counting of Hispanics, who sometimes self-identify as both White and Hispanic or Black and Hispanic. As a consequence, the difference between figures for Hispanics attending air shows and Hispanics in the general population are somewhat exaggerated.

2014 ICAS Spectator Survey

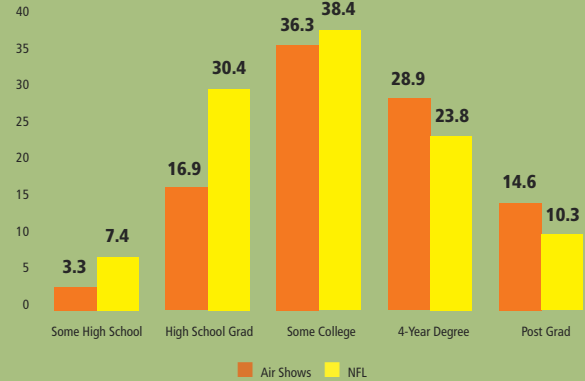
Education Level of Air Show Spectators 2014 vs. 1998-2014 Average



Overall, the education levels for air show spectators are increasing as compared to previous survey results during the last 16 years. The percentage of spectators reporting that they have “some high school” or are a “high school graduate” is decreasing and the percentage of spectators with post-high school education is increasing. This is true when comparing 2014 figures vs. the 16-year average and when comparing 2014 figures only to 2012 figures.

Comparisons between our air show audiences and the NFL’s demographic profile of its spectators highlight some dramatic differences. The NFL has more than twice as many people who self-report as having “some high school” or as a “high school

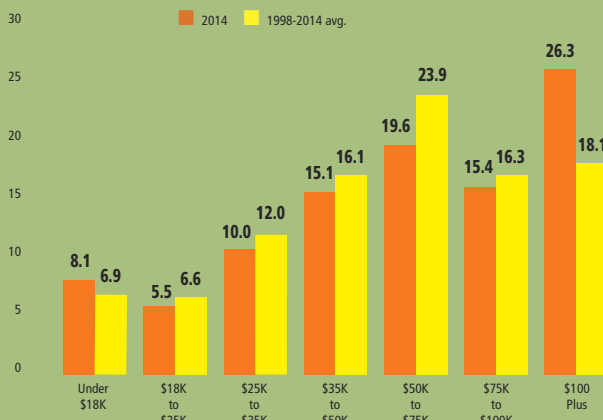
Education Level of Spectators Air Shows vs. NFL



grad.” And our events have significantly higher percentages of respondents with four-year degrees and post-graduate studies.

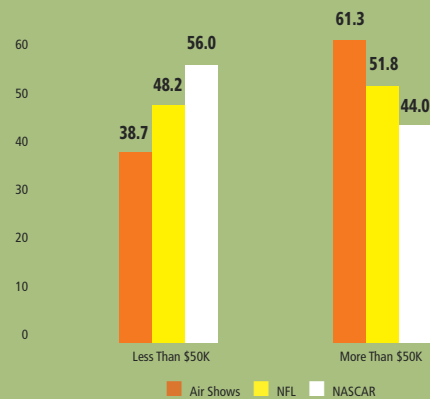
From a marketing and sponsorship perspective, this supports the more general observation that air show audiences are more affluent and better educated than spectators in other professional sports. This was true in 2014 and in every other year in which we made the comparison. A reporter who called the ICAS office recently said that air show demographics are closer to the audiences for golf tournaments and tennis matches than baseball games and NASCAR races.

Household Income Level of Air Show Spectators, 2014 vs. 1998-2014 Average



Although the household incomes for North American air show spectators continue to climb when compared to historic averages, the increases were not as dramatic as they have been in past surveys. The number of households reporting incomes over \$100,000 increased slightly, but – elsewhere – reported household incomes held steady.

Household Income Level of Spectators Air Shows vs. NFL vs. NASCAR



When compared to other sporting events (NFL and NASCAR), the comparative affluence of the air show spectator base comes into sharper focus. More than three-fifths of adult air show spectators report household incomes in excess of \$50,000 per year, compared to slightly more than half of NFL spectators and just over two-fifths of NASCAR fans.

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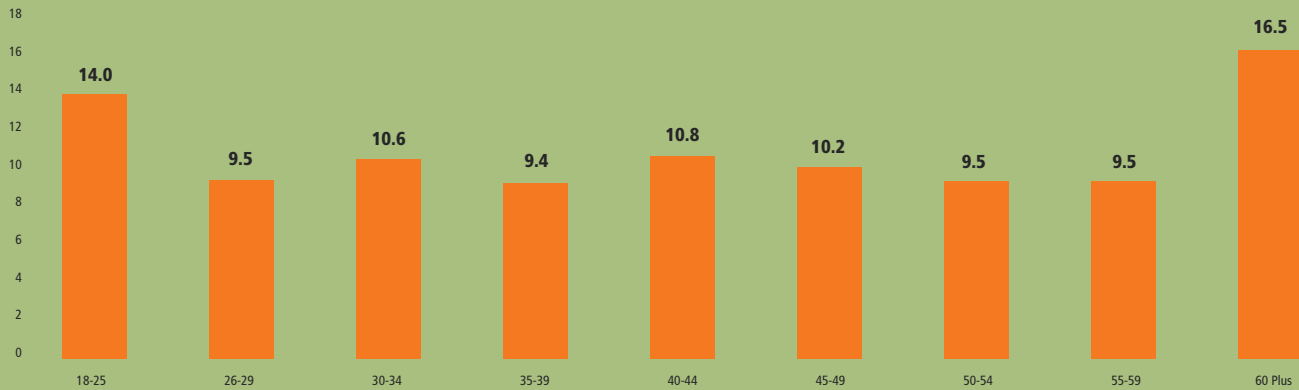
Doug Matthews

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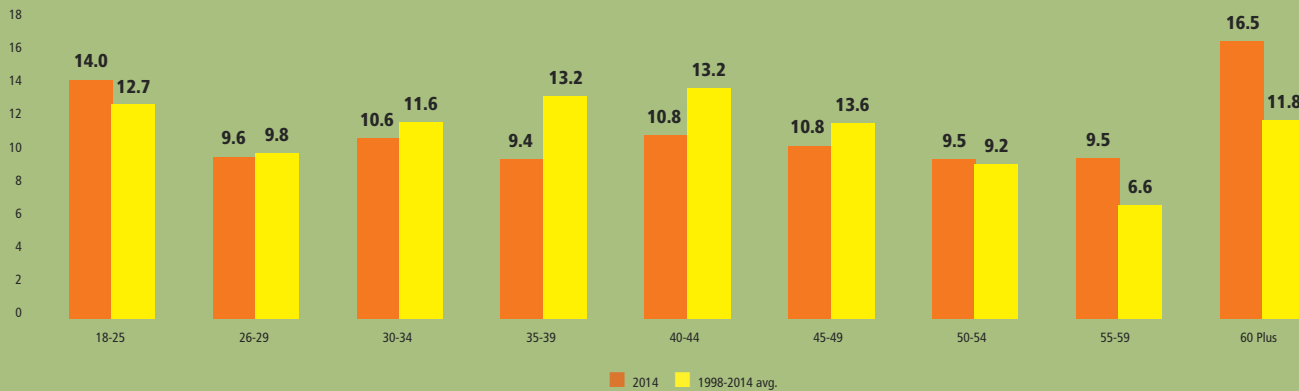
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2014 ICAS Spectator Survey

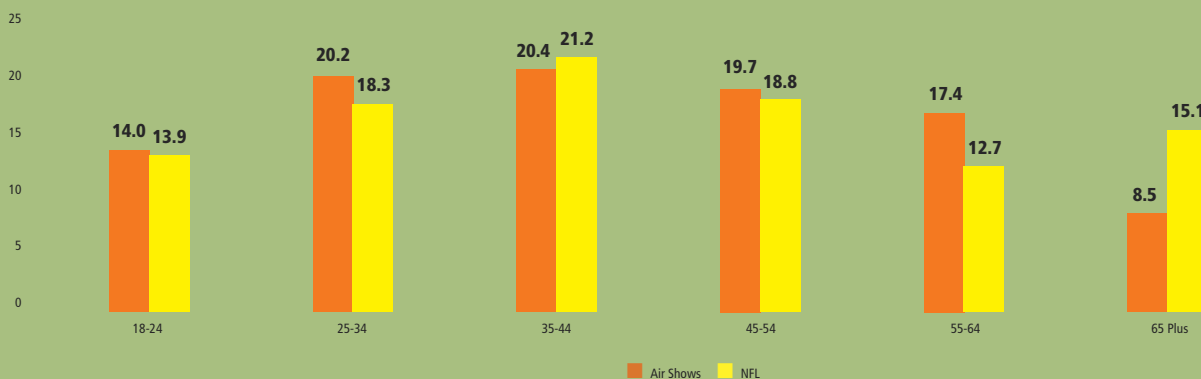
Age of Adult Air Show Spectators, 2014 Only



Age of Adult Air Show Spectators, 2014 vs. 1998-2014 Average



Adult Spectator Age, Air Shows vs. NFL



Air shows continue to be appealing to adults in most age groups. Although there are small spikes for adults in the 18-25 and 60+ age groups (top graph), the ages of air show spectators are well distributed across all age groups.

When compared to historic averages (middle graph), the air show spectator base seems to be getting marginally older,

though the increase in young adults between the ages of 18 and 25 runs counter to that general trend.

When the categories are shuffled a bit and compared to NFL audiences (bottom graph), our air show audiences appear even more balanced, with a larger number of younger spectators and almost half the number of 65+ spectators.



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"Without the guidance of mentors I had at EAA, I wouldn't be who I am today. I, along with 42,000 other pilots, are now helping light that same spark for kids through EAA's Young Eagles program. Since 1992, volunteer pilots – my personal heroes – have flown nearly 1.9 million kids as part of the program. The Young Eagles program has had a huge impact on general aviation."

– Sean D. Tucker
Airshow performer & Young Eagles chairman

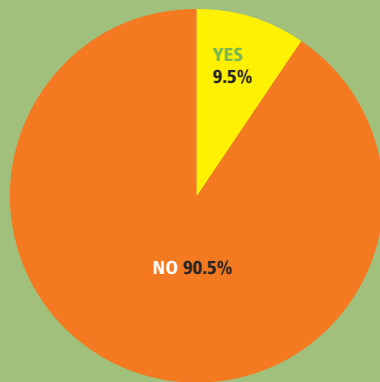
Become one of Sean's personal heroes by joining EAA and becoming a Young Eagles volunteer pilot.



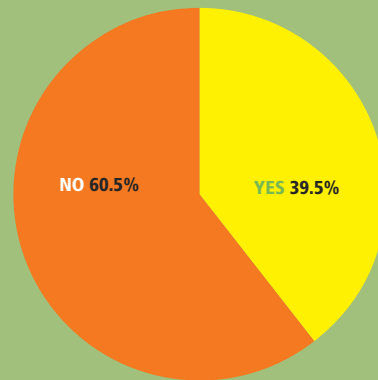
EAA.org/join | 800.564.6322

2014 ICAS Spectator Survey

Do you currently own a pilot's license?



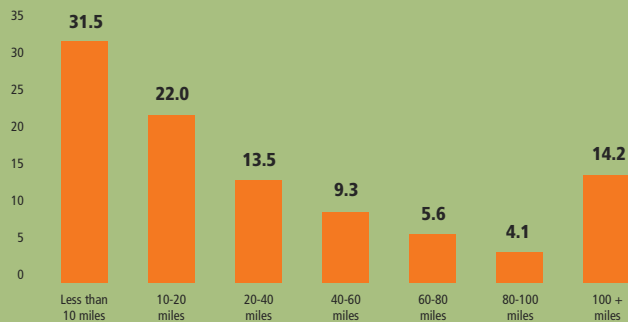
If not, have you or are you considering taking flying lessons?



For the 2014 ICAS Air Show Spectator Survey, we resurrected a question that we used to ask regularly, but have not asked in several years.

About ten percent of our adult spectators hold a pilot's certificate. Of the 90+ percent who do NOT hold a pilot certificate, two in five said that they are considering or have considered taking flying lessons.

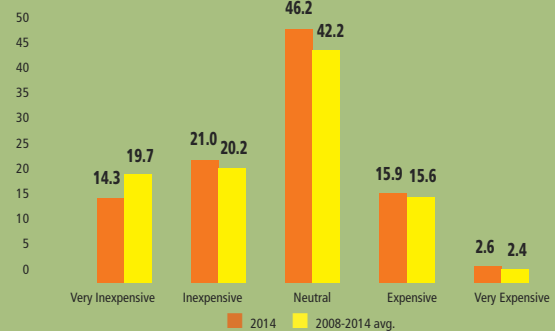
Distance Traveled to Attend the Air Show by Air Show Spectators, 2014 Responses



Fully three-quarters of all North American air show spectators travel less than 60 miles to attend the air shows at which they were surveyed. This is a figure that is right in line with results from past ICAS surveys and it is perhaps the most actionable piece of information from the survey.

This information provides clear direction to air shows working to develop their marketing plans. It also defines – in very precise and geographic terms – what the market size is. Only a small portion of their audience comes from outside of a 60 mile radius and experience has demonstrated that marketing efforts directed at those outside of 60 miles are inefficient and prohibitively expensive.

How would you describe the cost of your air show admission ticket? 2014 vs. 2008-2014 Average



Although fewer people are identifying ticket prices as “very inexpensive,” spectator responses continue to suggest that ticket prices are still lower than they could be. Those who no longer report ticket prices as being “very inexpensive” are now simply indicating that they are neutral on this question.

The percentage of survey respondents reporting that they found ticket prices to be expensive or very expensive is both largely unchanged and very low. That is, given the chance to complain about ticket prices being too high, less than one in five opted to do so.

Combined with the affluent demographics discussed earlier in this article and the chronic cash shortages reported by most shows, all signs seem to suggest that the air show industry is overdue for an upward recalibration of ticket prices.

Note: These statistics only include shows that charged an admission fee.

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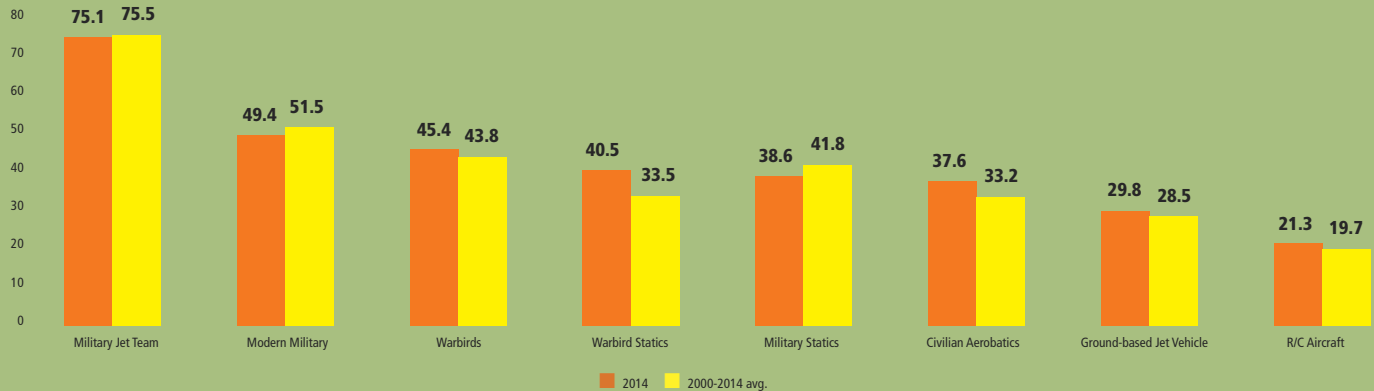
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2014 ICAS Spectator Survey

What were the main attractions for you at this air show? 2014 vs. 2000-2014 Average



The results to this question in 2014 reflected the somewhat different landscape in which the survey was conducted last year.

With the jet teams back, but military statics still almost non-existent, “warbird statics” inched ahead of “contemporary military statics” for the first time since ICAS began tracking this information.

Similarly, reflecting the fewer number of single-ship tac demos, modern military was slightly lower than historic averages and flying warbirds were somewhat higher than normal.

Although “civilian aerobatics” also recorded more responses than in past surveys, they still finished in sixth place behind military statics.

What areas of the air show do you think could benefit most from improvement? 2014 vs. 2004-2014 Average



As has been the case in the past, spectators were once again most concerned about additional shade...an issue that event organizers have limited ability to address.

But, reflecting the reduced involvement of military aircraft in 2014, the next most common critique was the need for more military aircraft participating in the show, followed closely by parking and traffic. In surveys and in anecdotal

reports, parking and traffic are consistently identified as among the top four or five challenges facing North American air shows.

Although this is not reflected in our survey results, parking and traffic have also been identified as two of the leading reasons that many prospective spectators decide not to attend the show at all.