

# Irish Amateur Radio Survey & SWOT Analysis

Author: Adrian EI9HAB

## Background

In March 2021 the International Amateur Radio Union (IARU) launched its “Facing the Future” initiative, whereby member national societies were asked to conduct a SWOT (Strengths, Weakness, Opportunities & Threats) analysis to ascertain the state of amateur radio in their respective countries. The aggregated national SWOT analyses are to be used to inform the IARU’s “Facing the future” workshop scheduled for October 2021, in Novi-Sad, Serbia. The IARU were explicit that the SWOT analysis was to pertain to the national picture & not limit itself to the national society, its members & activities. The IRTS established a working group for this purpose.

To meet the brief set by the IARU and to inform our SWOT analysis, the IRTS undertook an “attitudes & engagement” survey. To gain as comprehensive a view as possible regarding the current state of amateur radio in Ireland, the public “Irish Amateur Radio Survey” was conducted in April/May 2021. Given pandemic restrictions, the survey was conducted online and was advertised ahead of time through all available social media channels & IRTS News Services. Data from the survey was used to inform the deliberations of the SWOT analysis working group. The resultant SWOT analysis has since been submitted to the IARU.

The exercise of conducting the survey & SWOT analysis has yielded valuable data and insights regarding the current state of amateur radio in Ireland. This data will not only prove useful to the society, affiliated amateur radio clubs & society members; it will prove useful to anyone with an interest in amateur radio when charting a future course for the hobby.

This document is in two parts. Part A sets out the survey details and results. Part B contains the SWOT analysis outcome.

## Part A: The Survey

### Survey Details

The Survey was split into 3 sections:

- Section 1: Questions to Individual respondents: 19 Questions to elicit demographic & individual “Attitudes & engagement” data.
- Section 2: “Amateur Radio Clubs”: 9 Questions concerning amateur radio clubs; to elicit club member & club volunteer “attitudes & engagement” data.
- Sections 3: “The Future of Amateur Radio in Ireland”: 14 Questions concerning the image & attractiveness of amateur radio, its role in national life, strategic relationships & IRTS role concerning same.

### Response data:

n = 160

Data: Mixed Quantitative & Qualitative (anonymised)

Confidence Level = 95%, Margin of error = 7%

Declared %IRTS Member respondents = 79.4%


Declared %Non-IRTS Member respondents = 20.6%

## Results Narrative

Responses that were deemed to be impactful or revealed interesting results when filtered by the metric "> or < 10 years in the hobby" are highlighted in the charts below. Otherwise, results are demonstrated in text form.

Regarding the use of the metric "> or < 10 years in the hobby" for response comparisons:

It could be argued that to generate interesting comparative data, to inform discussions regarding the current state & future direction of the hobby in Ireland, we should compare the responses of younger people to those already established in the hobby. However, given only 3% of respondents indicated that they are <25 years of age, the author determined that given the paucity of data for this group, applying age as a metric for comparison would not yield meaningful results. Furthermore, the analysis of responses to Question 8. ("What age were you when you started in the Hobby?") found that of those who joined the hobby in the past 10 years, 71% of respondents indicate an age of between 26 & 64 years.

For this report, the author has determined that applying the metric of > or < 10 years in the hobby as a means of comparing responses is appropriate. Where this comparison has been applied you will find the  icon on the relevant charts.

### Section 1 Results: Questions to Individual respondents.

96% of respondents are male with 97% being >25 years of age. 68% indicated they are active "On the Air" at least once per week with 74% primarily operating from home. 68% indicated they are >20 years involved in the hobby. 41% of declared licence holders indicated they are not members of or collaborate with clubs/organisations/groups outside of amateur radio. 22% of respondents indicated they are not a member of an amateur radio club.

When asked "How were you introduced to the Hobby?" The >10 years in the hobby group indicated 37% through "Family & Friends", and 33% through "SWL" (Shortwave listening). In the <10 years' group 54% indicated through "Family & Friends", and 15% indicating through a "Field Day or Festival". "SWL" did not elicit a response with the <10 years' group.

When asked "What category best describes you?" 60% of the >10 years in the hobby group identify as "Irish amateur radio licence holder & IRTS Member". This identification decreases to 32% in the <10 years in the hobby group with 47% of this group identifying as a mix of "STEM Hobbyist/Radio Hobbyist/Maker - Licence Holder & IRTS Member".

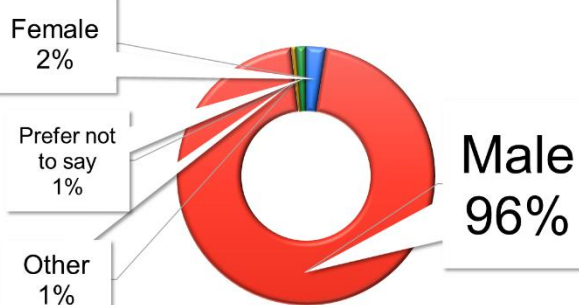
When asked "Age group when you started in the Hobby?" 53% of the >10 years in the hobby group indicated they were aged under 18, whereas, 71% of those in the hobby <10 indicated between the ages of 26 & 64.

When asked about the "Preferred Mode" of operation, SSB dominates as 1<sup>st</sup> preference. Morse (CW) is the first preference for 22% for those >10 years in the hobby, compared to 7% for those <10 years in the hobby. HF dominates as the preferred area of spectrum to operate in.

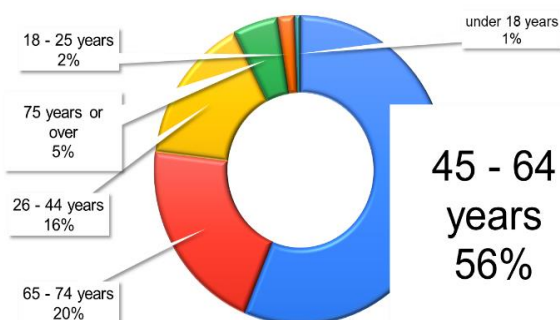
When asked "What can you do to promote the hobby?" 24% indicated they should "Promote to Youth", 23% "talk to others about it", 22% "Field Days/Public Events", 18% "Lead by example & be more active", 13% "Promote to Schools/Colleges as STEM Learning Hobby".

## Section 1 Highlights.

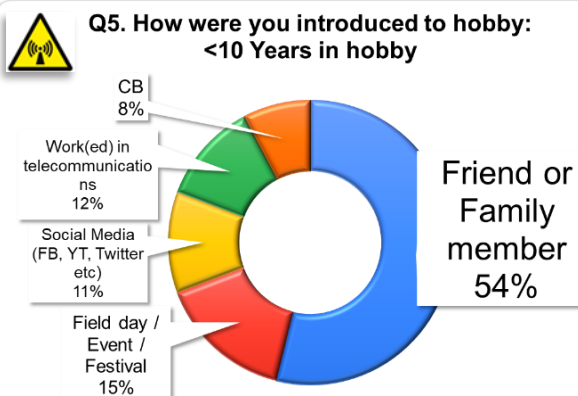
**Q1. Gender of respondents**



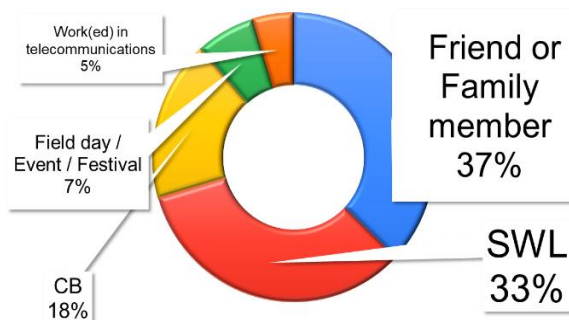
**Q2. Age of Respondents**



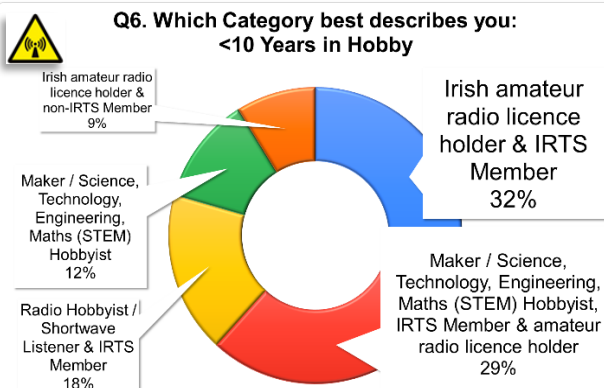
**Q5. How were you introduced to hobby:  
<10 Years in hobby**



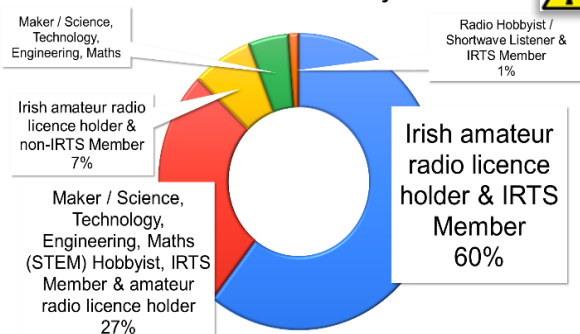
**Q5. How were you introduced to Hobby?  
>10 Years in Hobby**



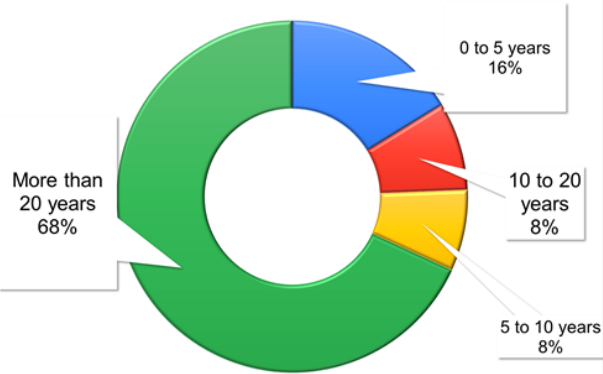
**Q6. Which Category best describes you:  
<10 Years in Hobby**



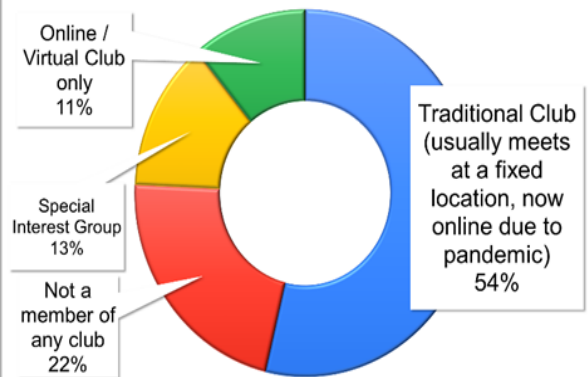
**Q6. Which Category best describes you:  
>10 Years in Hobby**



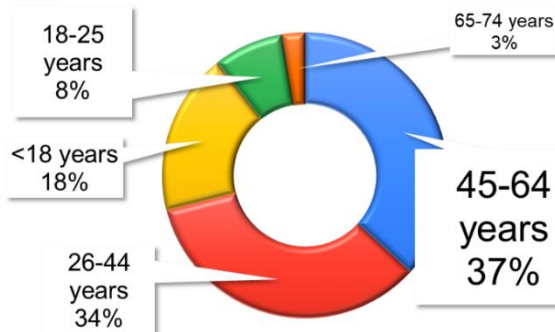
**Q7. How long have you been involved in radio as a hobby?**



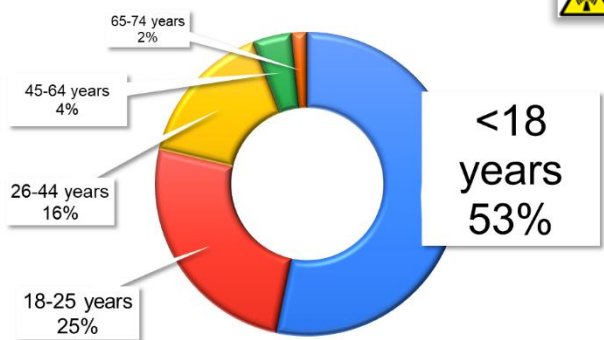
**Q15. Are You a member of an ARC?**



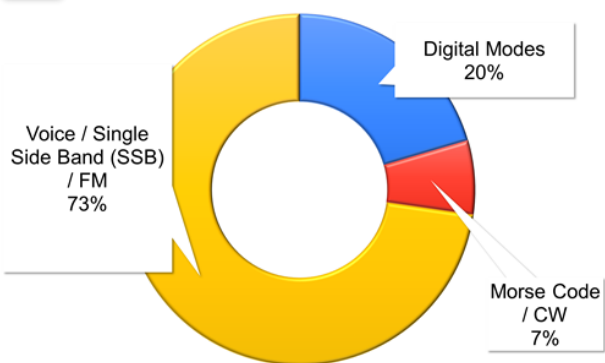
**Q8. Age when started in Hobby: <10 years in Hobby**



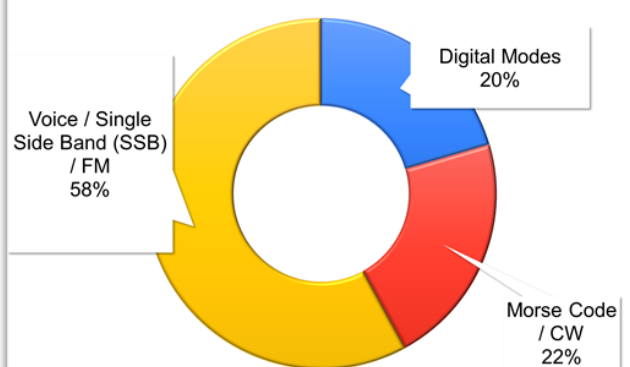
**Age When started in Hobby: >10 years in Hobby**

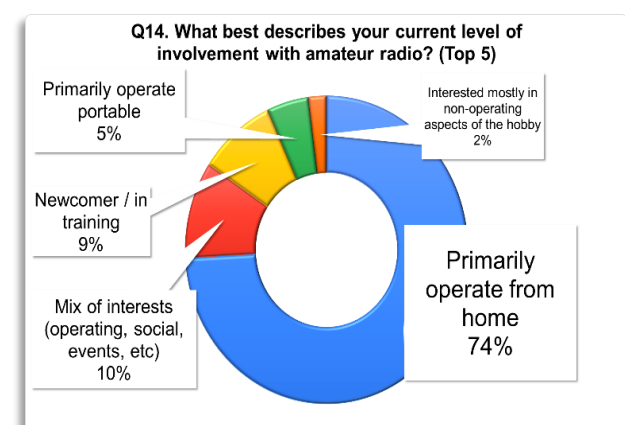
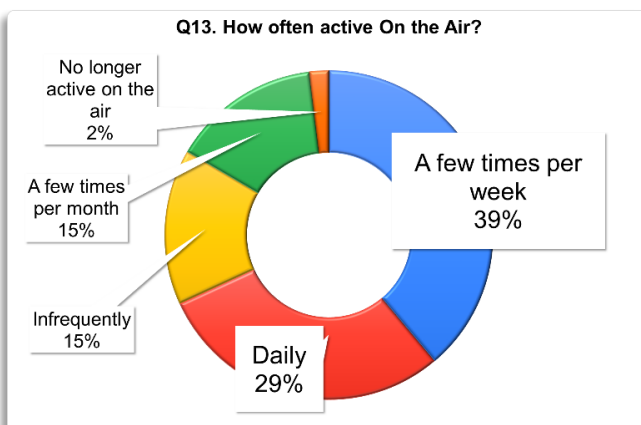
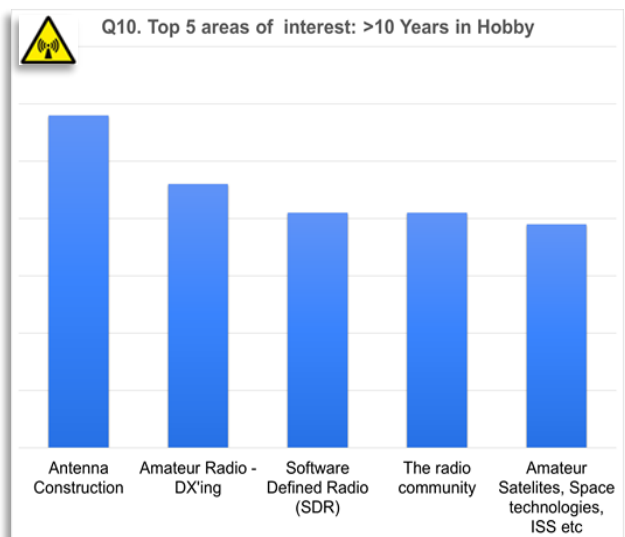
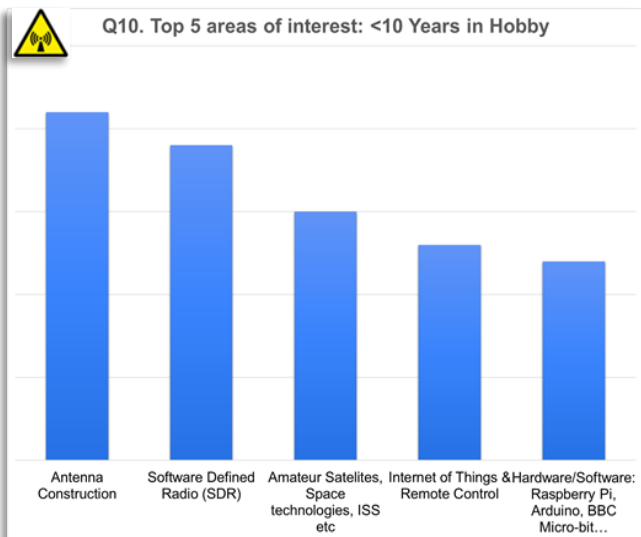
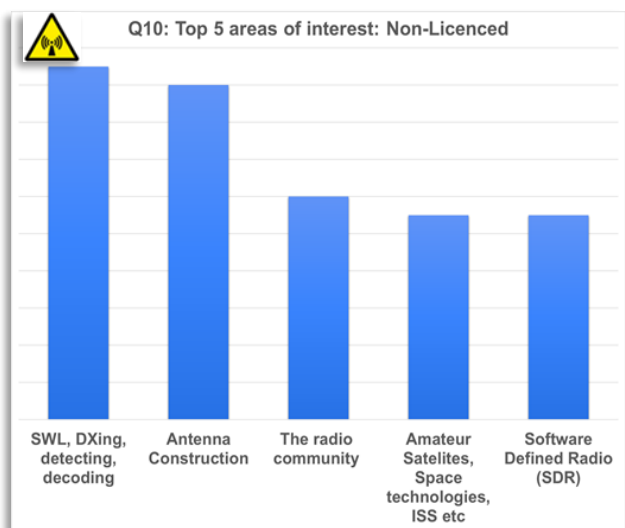
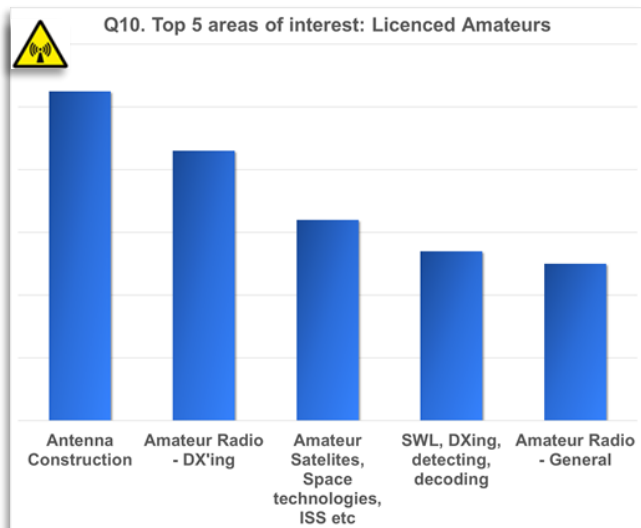


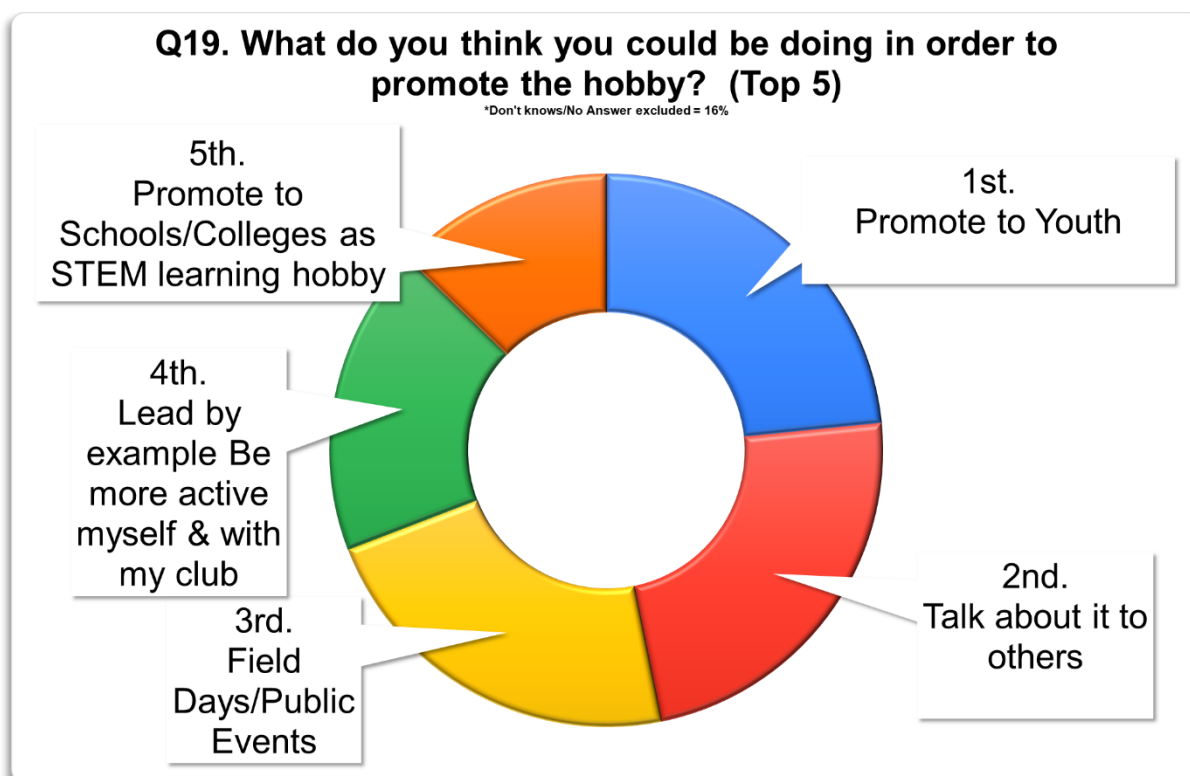
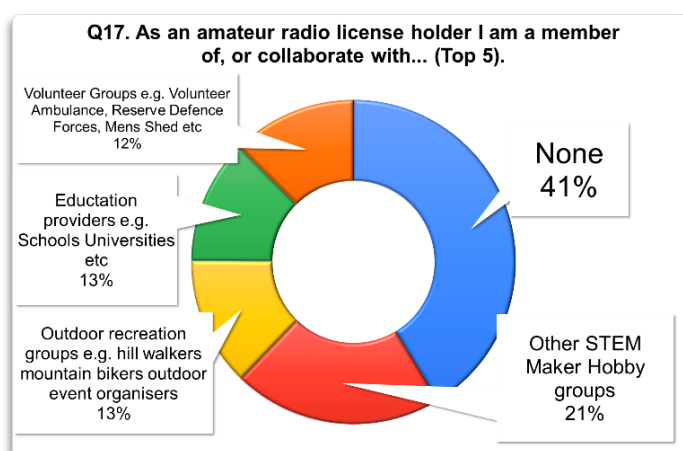
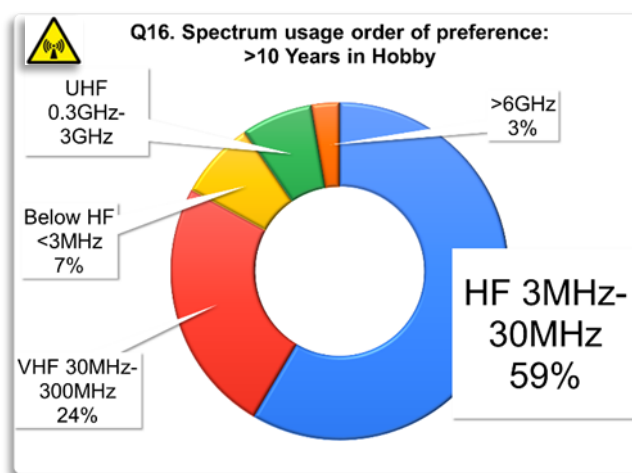
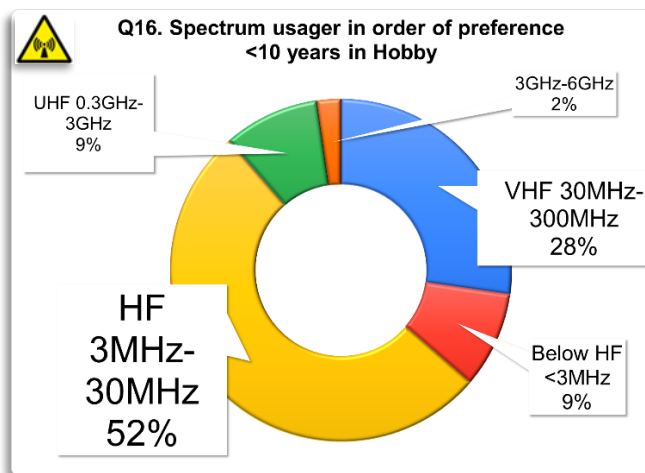
**Q12. Preferred Mode: <10 Years Licenced**



**Q12. Preferred Mode: >10 Years Licenced**







## **Section 2 Results: Amateur Radio Clubs: Member attitude & engagement.**

Respondents report an adequate club experience with respondents scoring 60% - 80% for measures such as clubs being “Approachable”, “Welcoming”, “Encouraging” & “Serving their needs”. For reference, customer or service user satisfaction scores of >80% are the generally accepted standard for deeming a service, or user experience, to be excellent & a market leader. Of note, 47% of respondents indicated that their club’s engagement with them has improved during the current pandemic (Chiefly achieved through video conferencing software such a Zoom & MS Teams). 17% reported a disimprovement in engagement by clubs with members over this period.

Respondents place a high value on “Skills, Training & Hands-on activities” at club level; with 86% of respondents indicating that these are “important” or “very important”. 59% of respondents reported that clubs help improve their skills. Respondents place importance on club activities & experiences with >70% indicating that “Club stations”, “Guest speakers & talks”, “field days”, “regular club meetings” and “an up-to-date website” as being “important” or “very important”.

When asked, club volunteers indicated that supports for clubs and volunteers running clubs would be useful; with >80% of this group indicating that supports such as a central website for “Training materials”, “Ideas for Clubs” and “material to help members’ skill development & progression” would be useful.

When asked “Do you have any ideas on how the IRTS could support clubs”; 35% of respondents said a “Modern Marketing” campaign, comprising a multi-media approach that can be supported by clubs; and that a “One Stop Shop” website highlighting all affiliated clubs would be of benefit. 26% said, “Regular (IRTS) visits & interactions with clubs so to ascertain club needs, and to work collaboratively on identifies issues e.g. rent, insurance & training”. 15% of respondents say the IRTS “Needs to modernise”, “have more open & transparent communications”, “be inclusive, less hierarchical & less elitist” & have Anti-bullying & Code of Conduct PPGs.

When asked “What do you think amateur radio clubs should be focusing on or doing better?” 29% indicated “Providing practical radio skills & education”, 28% “Outreach to youth, youth groups & schools”, 21% “Outreach to the general public by promoting the “STEM knowledge and skills value of amateur radio for all ages”, 11% that clubs should be “Open, Welcoming & Inclusive with good member conduct” & 11% that clubs should “Increase their Online/Social Media presence”.

## **Section 2 responses:**

### **Thinking about a Club you know or a member of...**

(Options: Yes, Uncertain, No)

• My Club is approachable	77% indicated “Yes”
• My Club welcomes Newcomers	76% indicated “Yes”
• I am encouraged to take part	71% indicated “Yes”
• I’m kept informed	70% indicated “Yes”
• I feel valued as a member	68% indicated “Yes”
• My club serves my needs	61% indicated “Yes”
• Helps me improve my skills	59% indicated “Yes”
• Involved in non-amateur radio Clubs	51% indicated “Yes”
• I can interact online	39% indicated “Yes”
• I get what I need from a mix of Clubs	39% indicated “Yes”
• Engages with other STEM hobby groups/clubs	39% indicated “Yes”



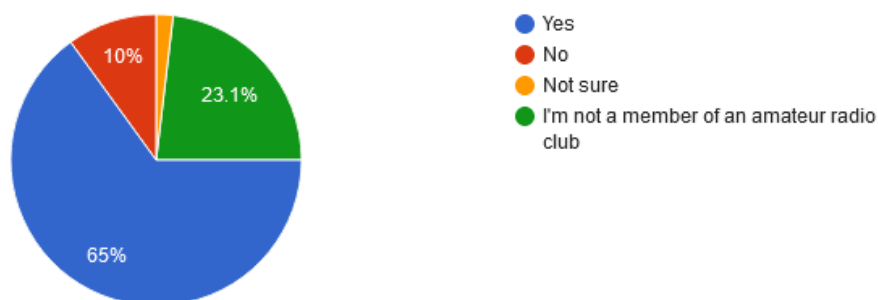
## How important are the following to you?

(Options: Very Important, Important, Take it or Leave it, Not Important)

• Skills, Training, Hands-on activities	86% indicated "important" or "very important"
• Up-to-Date Website	79% indicated "important" or "very important"
• Regular Club Meetings	76% indicated "important" or "very important"
• Field Days for Members	76% indicated "important" or "very important"
• Guest Speakers & Talks	74% indicated "important" or "very important"
• Club Station/Club "on the air"	73% indicated "important" or "very important"
• Club Radio Nets	65% indicated "important" or "very important"
• Club Newsletter	56% indicated "important" or "very important"
• Social events (Pub/BBQ etc.)	55% indicated "important" or "very important"
• Active on Social Media	50% indicated "important" or "very important"
• Club involvement in Contests	49% indicated "important" or "very important"

## Is your Amateur Radio Club affiliated to the IRTS?

160 responses



## You're involved with running a club. Would you or your club find any of the following useful?

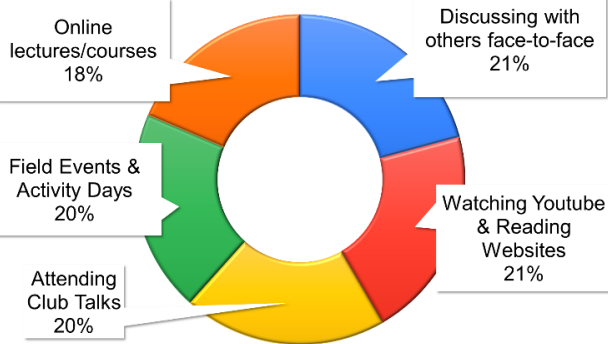
(Options: Yes, Uncertain, No)

**n = 96 for this section, % responses reflective of same**

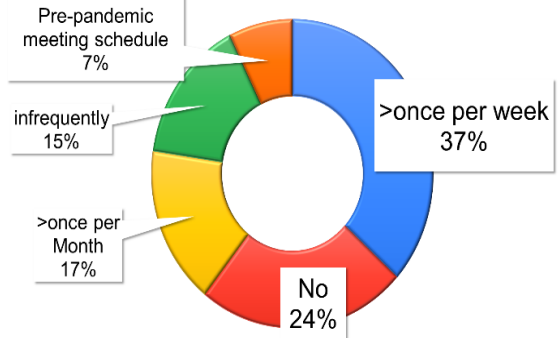
• Website offering Training materials (Slides/Videos) to Clubs	86% indicated "Yes"
• Website offering material & ideas for clubs	85% indicated "Yes"
• Website offering material to help member's skill development & progression	82% indicated "Yes"
• A mailing group to discuss training	58% indicated "Yes"
• Mailing group to discuss issues affecting the running of clubs	54% indicated "Yes"
• Facebook group to discuss issues affecting the running of clubs	38% indicated "Yes"
• Chairman only email group to discuss issues affecting the running of clubs	37% indicated "Yes"



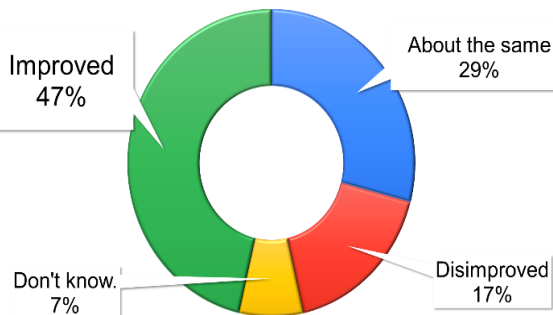
**Q24. Preferred ways of gaining new skills & exploring Hobby. (Top 5)**



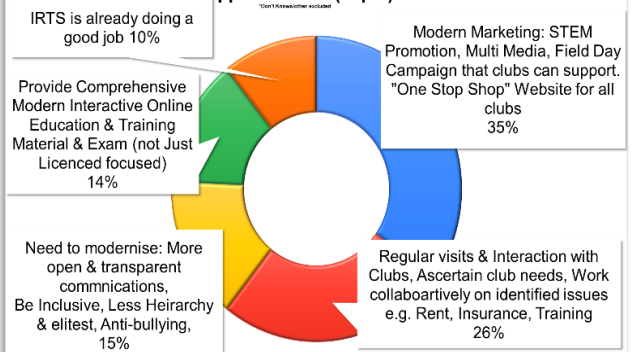
**Q26. During the current pandemic, your club conducts meetings & talks online e.g. via Zoom, Microsoft Teams etc.. (Top5)**



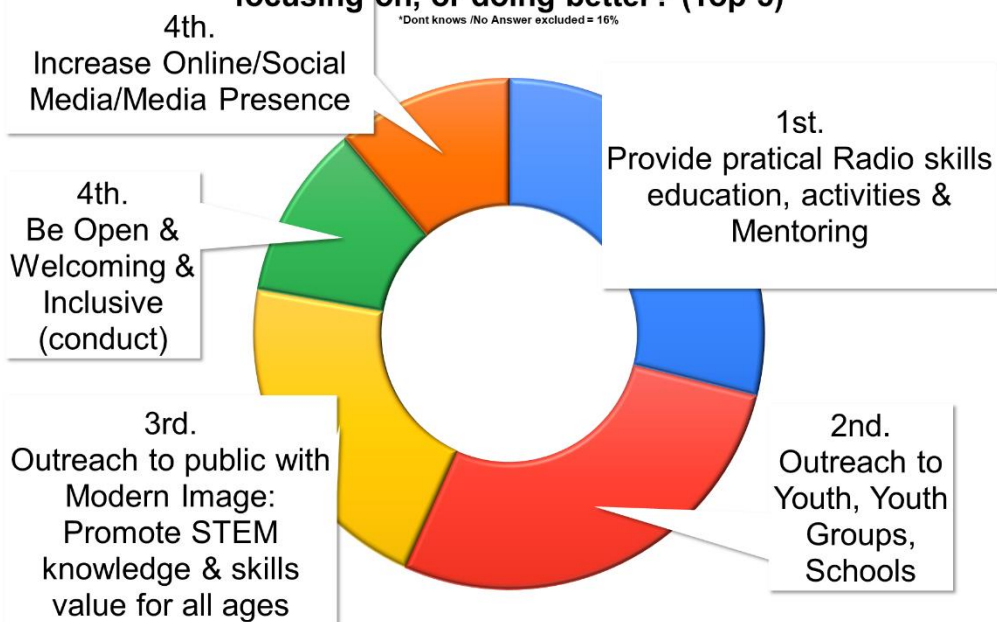
**Q27. During the current pandemic, I feel my club's move online has meant engagement with members has...**



**Q29. Do you have any ideas on how the IRTS could support clubs? (Top 5)**



**Q28. What do you think amateur radio clubs should be focusing on, or doing better? (Top 5)**



### Section 3. The Future of Amateur Radio in Ireland

When considering the future of amateur radio in Ireland, 85% of respondents “Agree” or “Strongly Agree” that “not enough people know about Amateur Radio”, and 58% indicated that Amateur Radio has an “Image Problem”. 26% “Agree” or “Strongly Agree” that the IRTS “collaborates & engages with Governmental & non-Governmental STEM education programmes initiatives”. 14% “Agree” or “Strongly Agree” that the IRTS “collaborates & engages with education providers e.g. schools, universities, adult education”.

72% of respondents “Agree” that the Amateur Radio hobby needs to actively engage & participate in government/state agency & non-governmental funded STEM promotion & education initiatives, and 67% “agree” that our Hobby needs to “collaborate with Maker & other STEM Hobby groups”. 43% of respondents say the IRTS should focus on a “Modern Marketing” campaign, comprising a multi-media approach that can be supported by clubs; and that a “One Stop Shop” website highlighting affiliated clubs with support resources would be of benefit. 26% would like to see the IRTS interacting with & visiting clubs regularly and work collaboratively on identified issues e.g. “planning, legal, insurance & regulatory matters”.

21% of respondents say the IRTS “Needs to modernise”, have more open & transparent communications, be inclusive, less hierarchical & less elitist and have Anti-bullying & Code of Conduct PPGs.

### Section 3 Responses:

**There has been discussion nationally about whether the IRTS and clubs need to change, and how. We'd be interested to know your thoughts on the following topics...**

(Options: I Agree, Unsure, I don't Agree)

- |  |                         |
|--|-------------------------|
| • We need to actively engage & participate in government/state agency & non-governmental funded STEM promotion & education initiatives | 72% indicated “I agree” |
| • At a public event, just running a 40m SSB Special Event Station isn't good enough  | 69% indicated “I agree” |
| • We need to collaborate with Maker & other Hobby groups   | 67% indicated “I agree” |
| • Clubs are struggling to find new members   | 65% indicated “I agree” |
| • We are poor at retaining individuals and they drift away   | 52% indicated “I agree” |
| • Fewer people are attending clubs   | 51% indicated “I agree” |
| • Traditional Clubs need to “Change or Die”  | 48% indicated “I agree” |
| • Most amateurs prefer to learn about a subject online rather than from a club talk  | 32% indicated “I agree” |
| • The current club structure is out-dated  | 26% indicated “I agree” |
| • Instead of lots of small clubs, one large group would be better  | 11% indicated “I agree” |

## The biggest challenges regarding the growth of the hobby are...

(Options: Agree, Disagree, Not Sure)

- |  |                         |
|--|-------------------------|
| • Not enough people know about amateur radio         | 85% indicated "I agree" |
| • Modern housing/Apartments not conducive to Hobby   | 74% indicated "I agree" |
| • Amateur Radio has an "image problem"               | 58% indicated "I agree" |
| • The Hobby is less relevant than it was             | 50% indicated "I agree" |
| • Entry to the Hobby is difficult                    | 50% indicated "I agree" |
| • Not enough activity "On the Air"                   | 41% indicated "I agree" |
| • IRTS doesn't offer enough help or support          | 33% indicated "I agree" |
| • Clubs don't offer enough help and support          | 30% indicated "I agree" |
| • Internet modes (e.g. Network Radio, Echolink etc.) | 28% indicated "I agree" |
| • The Hobby is too expensive                         | 23% indicated "I agree" |

## Which of the following IRTS services do you use or would be interested in using?

(Options: Have Used, Have Never Used, Not Interesting in Using)

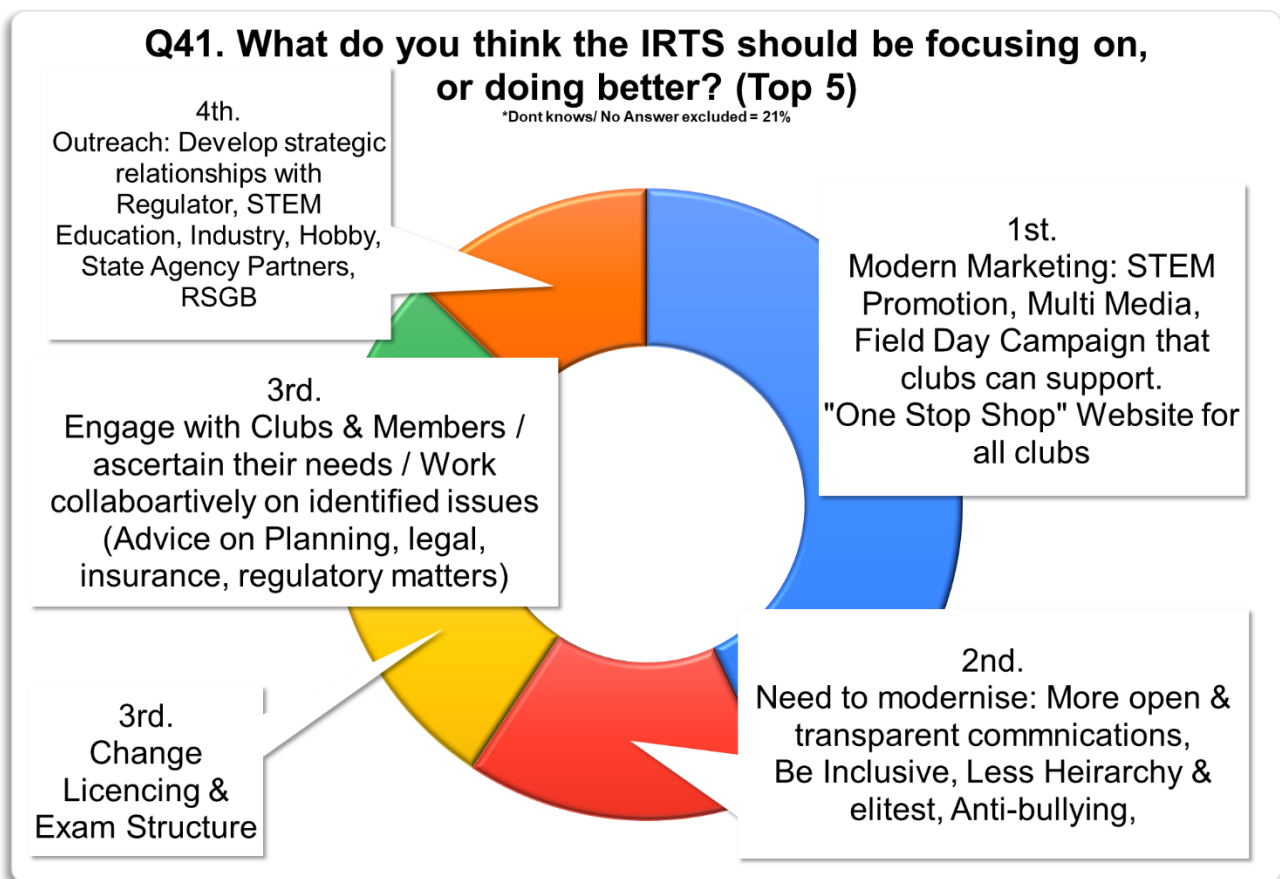
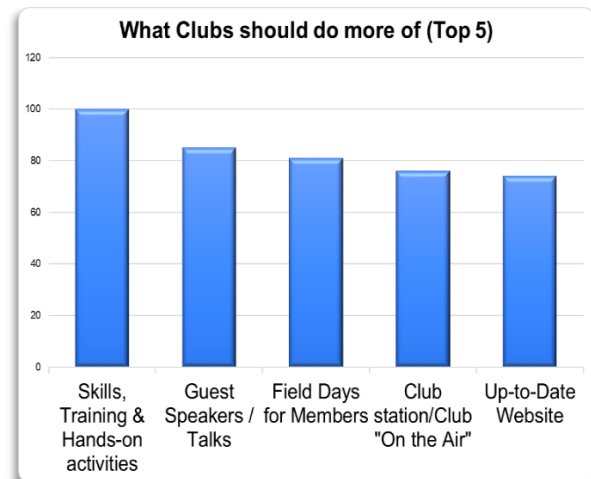
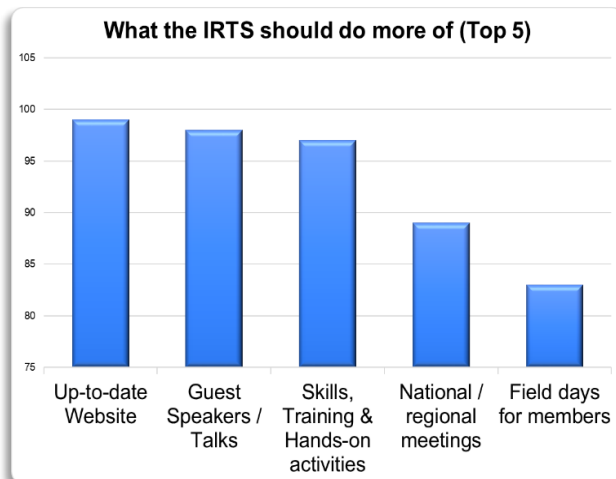
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|---|---------------------------|
| • EI News Archive (Monthly News Letter)                       | 78% indicated "Have Used" |
| • IRTS Radio News Broadcasts                                  | 74% indicated "Have Used" |
| • Publications Archive (ECHO Ireland Magazine)                | 74% indicated "Have Used" |
| • IRTS Rallies & Events                                       | 70% indicated "Have Used" |
| • Repeater &/or Internet gateway list                         | 69% indicated "Have Used" |
| • IRTS VHF/UHF/SHF Information                                | 66% indicated "Have Used" |
| • Course guide/study material                                 | 53% indicated "Have Used" |
| • Radio Theory Links  | 51% indicated "Have Used" |
| • IRTS Contests   | 51% indicated "Have Used" |
| • IRTS QSL Bureau   | 44% indicated "Have Used" |
| • Historical Archive Radio Experiments by Colonel Dennis EI2B | 44% indicated "Have Used" |
| • IRTS Awards   | 42% indicated "Have Used" |
| • Online HAREC course   | 35% indicated "Have Used" |
| • Morse Test  | 29% indicated "Have Used" |
| • IRTS Book Sales   | 29% indicated "Have Used" |
| • IRTS Technical Panel  | 28% indicated "Have Used" |

## In your opinion the IRTS...

(Options: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree)

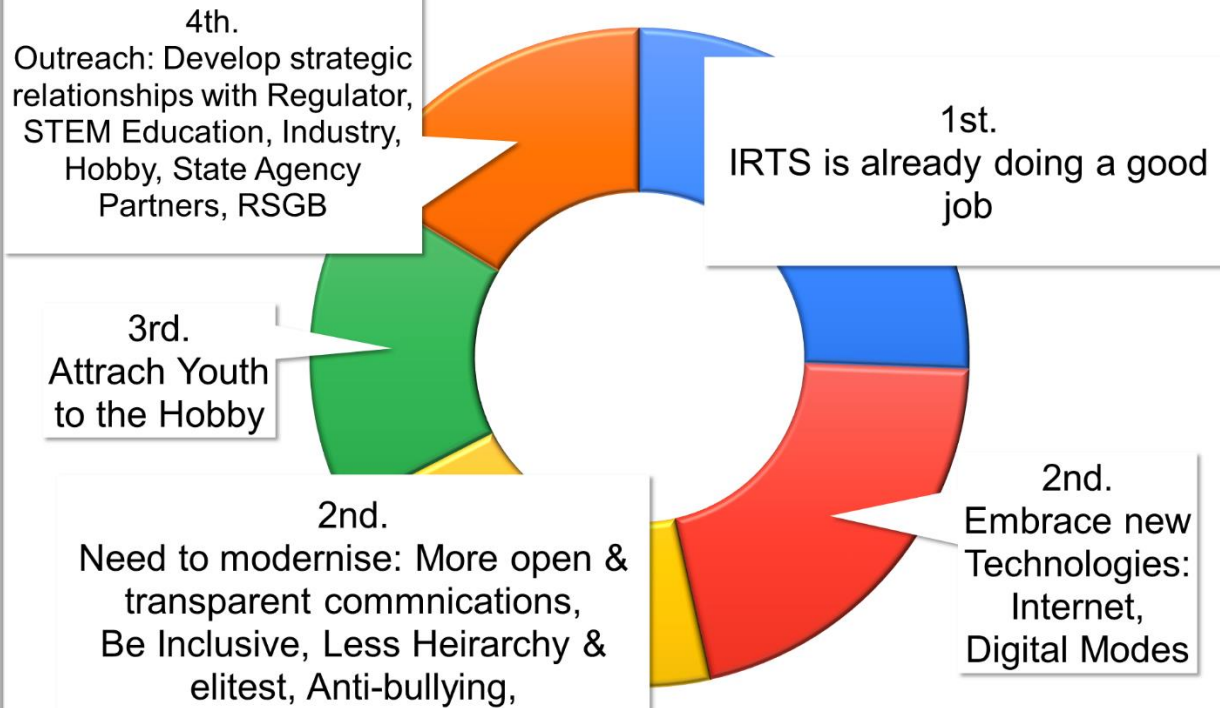
- |  |                                 |
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| • Gives focus to traditional forms of amateur radio?<br>e.g. SSB, CW operation                                 | 50% "Agree" or "Strongly Agree" |
| • Collaborates & engages with Volunteer Groups e.g.<br>Mountain Rescue etc.                                    | 30% "Agree" or "Strongly Agree" |
| • Collaborates & engages with Governmental &<br>NGO STEM education programmes & initiatives                    | 26% "Agree" or "Strongly Agree" |
| • Collaborates & engages with Youth Groups e.g. Scouts   | 26% "Agree" or "Strongly Agree" |
| • Gives focus to new & emergent technologies that utilise<br>the radio spectrum                                | 21% "Agree" or "Strongly Agree" |
| • Engages with outdoor recreation groups e.g. hill-<br>walkers, mountain-bikers, outdoor event organisers etc. | 16% "Agree" or "Strongly Agree" |
| • Collaborates & engages with education providers e.g.<br>schools, universities, adult education               | 14% "Agree" or "Strongly Agree" |

## Section 3. Highlights



## Q42. Other thoughts, comments or concerns (Top 5)

\*Don't Knows /No Answer excluded = 32%



## Discussion

Amateur Radio hobbyists are committed to their hobby with 68% of respondents indicating that they are active “on the air” at least once per week. There is a large cohort of experienced hobbyists with 68% of respondents indicating that have >20 years’ experience in the hobby. It could be argued that this gives the hobby a strong core of knowledgeable, skilled & technically expert people. In addition, many appear motivated to contribute to the greater good of the wider amateur radio community, as 60% of respondents indicated they are involved in the running of amateur radio clubs.

There are clear challenges regarding the membership age & gender profile of the Hobby. Against this respondent profile backdrop (96% Male, 81% aged >45 years), the survey data has generated some emergent themes common to individual radio amateurs, clubs, and the national society. These themes relate to how respondents believe amateur radio should broaden its attractiveness & appeal to the general public, to increase membership and securing the hobby’s viability in the future.

- Theme 1: A Modern Multimedia Marketing Campaign: To promote Amateur Radio as a STEM Hobby for the 21<sup>st</sup> century; with a specific emphasis on the STEM education value of the hobby, attracting youth as an element of any campaign.
- Theme 2: Modernisation of member, club & national society culture, values and structures: with an emphasis on openness, transparency, inclusivity, tackling a perceived hierarchical and elitist culture, implementation of anti-bullying & code of conduct PPGs. Improve supports offered by National Society to Clubs and Members, improve supports offered by clubs to members and for individual members to lead by example.
- Theme 3: Development of strategic relationships with STEM education, state agency & NGO partners (e.g. schools, colleges, the regulator, Science Foundation Ireland etc.), other STEM hobby groups & industry partners: Highlight the STEM education value of amateur radio to potential strategic partners. Partner with the aforementioned in STEM education initiatives in a manner is that mutually beneficial & avail of related funding. Seek changes to the licencing structure.
- Theme 4: Increase the public visibility of the Hobby (aligned with Theme 1): Increased outreach by members, clubs and national society to Youth groups, Schools, STEM education partners, and other STEM hobbyists. Demonstrate the core values of amateur radio e.g. self-training, personal progression & making life-long friends with like-minded people. Achieve this through dynamic field days & public events that showcase the many aspects of the hobby. Encourage amateur radio hobbyists to talk about & promote the hobby to other people.

## **PART B: IRTS SWOT Analysis for the IARU's "Facing the Future" initiative**

As stated in the introduction, in March 2021 the International Amateur Radio Union (IARU) launched its "Facing the Future" initiative, whereby member national societies were asked to conduct a SWOT analysis on the state of amateur radio in their respective countries. This initiative is informed by a survey conducted by Sylvain F4GKR. The principal findings of the survey were:

- IARU societies are losing members; 40% in the last ten years despite good examination throughput.
- IARU societies are getting older with fewer young amateurs take leadership roles in member societies
- IARU societies have lost numbers steadily over the years
- Technology and how people interact are changing, what is the future relevance of amateur radio?
- What is the future relevance of IARU and national amateur societies?

Given the above, the IARU is setting about answering some key questions about the future of amateur radio.

- How can national societies attract new radio amateurs?
- How can IARU support the amateur radio community, and the Member Societies, by adapting to the changes?
- What can IARU and Member Societies do to support the growth of amateur radio?

The IARU believes that business as usual is not an option anymore, that...

- We need to refocus our thinking and way of operating
- By working together we may be able to change the current trends
- Whatever the way forward, we all need to "own" it
- Do we need a shared view of the current state of amateur radio?
- What is our shared future vision for amateur radio?
- What steps do we need to take to meet the future?
- What does this mean for IARU and its member societies?
- What action plans, financing and resources are needed to make these changes?

With the above informing the IARU, it was decided that an aggregated SWOT Analysis from all member societies should be undertaken as the next step in the "Facing the Future" initiative. The IARU was explicit that the SWOT analysis was to pertain to the national picture & not limit itself to the national society, its members & activities.

### **What is a SWOT Analysis?**

This refers to an organisations strengths, weaknesses, opportunities and threats. SWOT analysis is a basis for identifying key issues in matching an organisation's internal resources and distinctive competencies with environmental threats and opportunities. The development and implementation of any subsequent strategy will:

- Capitalises on the organisation's strengths
- Controls, reduces or avoids its weaknesses
- Neutralises threats
- Exploits opportunities.

Having comprehensive data available to inform the SWOT analysis aids an organisation to refine its analysis outcome; hence the value of data generated by the Irish Amateur Radio Survey for the IRTS SWOT analysis.



SWOT Analysis Facilitator:  
SWOT Analysis working group:

Séamus  
Jim  
Niall  
Adrian

EI8BP  
EI4HH  
EI6HIB  
EI9HAB

## IRTS SWOT Analysis Outcome

Strengths		
1	Great STEM introductory Hobby	Practical experience of electronics & experimentation
2	Passionate members & volunteers	Membership subscription typically lasts from licenced to Silent Key
3	Large Online Community	Actively engaged radio community on Twitter, Facebook, YouTube etc.
4	Strong Technical expertise within membership	Culminative knowledge & skills within membership is a significant resource
Opportunities		
1	Facilitate the broadening of membership profile	Build a diverse community of like-minded people where there is mutual respect for the different ways we enjoy the hobby
2	Leverage the membership to aid promotion and development of the hobby.	Achieve buy-in from membership to autonomously promote and develop the hobby
3	Engage with STEM promotion bodies and initiatives	In engaging with bodies & initiatives we need to bring our Culminative knowledge & skills as a resource
4	Improve relationship & engagement with regulator	Good relationship required to bring about change regarding license & exam structures
Weaknesses		
1	Narrow Member profile	Over 95% white-male. Over 75% over 45 years old.
2	Inadequate Club Spaces	Lack of suitable spaces to maximise collaboration, teaching & learning.
3	Limited desire of membership to engage in strategic development of hobby.	Reluctance of membership to see change in their hobby. Segmentation within the hobby makes agreed strategic development difficult.
4	Limited influence with Legislators & Regulator	Personality based relationship and not an institutional one.
5	No Engagement with STEM promotion bodies or initiatives	Lack of engagement renders amateur radio practically invisible
Threats		
1	Lack of adherence to best practice in relation to Child Protection & Bullying Legislation.	Could result in serious and lasting reputational damage to hobby
2	Competition from Other Hobbies	Competitors have a better and more diverse member experience.
3	Loss of uniqueness due to technological change.	Hobby lacks a unique selling point.

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