

professional associations

Associations Matter 2013 State of the Sector Report



Study conducted and prepared by Survey Matters, Australia



Acknowledgements

The Associations Matter: 2013 State of the Sector Study was designed to deliver Australasian benchmark research that will provide a comprehensive report about members' opinions on the value of associations, why they join and what they want associations to do for them.

We would not have been able to provide such a valuable resource without the support of a number of organisations. In particular, we would like to thank our principal partner, the Australasian Society of Association Executives (AuSAE) for all of their support in encouraging associations to participate. And of course, to all of the inaugural participating associations who have given up their time and invited their members to participate, a huge thank you is required. We could not have done it without you!

principal partner



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Participating Organisations

Association of Queensland Nurse Leaders (AQNL)

Australasian Society of Association Executives (AuSAE)

Australian College of Children and Young People's Nurses (ACCYPN)

Australian Dental Association (Victorian Branch) (ADAVB)

Australian School Library Association (ASLA)

Australian Sleep Association (ASA)

Australian Society of Sports Administrators (ASSA)

Career Development Association of Australia (CDAA)

Chartered Institute of Logistics and Transport Australia (CILTA)

CRAN*Aplus*

Design Institute of Australia (DIA)

Library & Information Association of New Zealand Aotearoa (LIANZA)

Mathematical Association of Victoria (MAV)

Migration Institute of Australia (MIA)

Museums Aotearoa

National Speakers Association of Australia (NSAA)

New Zealand Association of Occupational Therapists Whakaora Ngangahau Aotearoa (NZAOT)

New Zealand College of Clinical Psychologists (NZCCP)

New Zealand Veterinary Association (NZVA)

Occupational Therapy Australia (OTAus)

Real Estate Institute of New South Wales (REINSW)

Royal Australian Chemical Institute (RACI)

Speech Pathology Australia (SPA)

Foreword

Dear Colleague,

The Australasian Society of Association Executives is proud to be a part of this landmark study into professional associations in Australia and New Zealand.

Associations are under increasing pressure. We know that the demographic landscape is changing. We know that associations are finding it increasingly difficult to recruit and retain members. We know that to be leaders in our field associations need to understand what members value and consistently deliver experiences that exceed their expectations. But, to do this, we need to understand our members' needs, preferences and requirements.

Research into membership trends provides individual associations with information which is critical to our performance and future viability. It helps associations understand the aspects of our products and services that are important and whether membership provides value. It provides key insights to enable associations to devise and implement strategies to tailor service offerings, improve membership retention, generate positive word of mouth referrals and reduce costs.

Sector wide research has the added benefit of enabling individual associations to understand how your association is performing compared to others.

This report provides this information. I would like to congratulate Brenda Mainland and Rebecca Sullivan at Survey Matters for their hard work in producing this interesting and insightful report.

I'm confident that you will find the information within this report invaluable as you consider new strategies for enhancing the membership program of your professional association for 2014 and beyond.

Regards,

Tony Steven
President
AuSAE





Introduction

Welcome to the inaugural [Associations Matter: 2013 State of the Sector Study for Professional Associations!](#)

The idea for this study came from our experience conducting individual membership surveys for associations. We were often asked if we could benchmark individual results. Unfortunately, until now, we couldn't! We realised that sector wide research was necessary to provide an overall reference point and also allow individual associations to understand how they are performing compared to others.

Survey Matters is thrilled to be able to deliver this long sought data. We hope that it will become an important part of the sector and add real value to your association, helping guide the decisions you make to address the challenges ahead and provide services that your members value.

All our partners and participating associations have contributed significant time, energy and resources to this project, and we thank them for their efforts. We particularly acknowledge our principal partner, the Australasian Society of Associations Executives (AuSAE), for helping to spread the word and recruit associations to take part.

We also acknowledge the 23 associations, who, by inviting their members to participate have demonstrated the spirit of collaboration required to generate this comprehensive view of the professional association sector.

Last, and by no means least, we thank the 7,749 individual members who took the time to complete this survey and provide their opinions and perspectives, without which this study would not have been possible.

We trust that you will find the results interesting, informative and useful. We also welcome any feedback you may have as we continue to improve and develop the research to ensure it provides on-going value to the sector.

Enjoy!

Rebecca Sullivan & Brenda Mainland
Survey Matters





EXECUTIVE SUMMARY

The [Associations Matter: 2013 State of the Sector Study](#) (Professional Associations) is the first of its kind in Australasia and provides vital information to professional associations about the demographics, opinions, service and product preferences, satisfaction and renewal intentions of association members.

Survey Matters has conducted this research independently to meet the need for sector wide research against which individual associations can benchmark their individual performance. The objective of the study was to determine what existing members think about their professional association – which services they value, how they think their association is performing, how they like to communicate and whether they intend to renew. We recognise that, by their very nature, existing members are already biased towards the value of associations – they have chosen to belong. However, they represent the group whose opinions and preferences matter when it comes to associations fulfilling their main roles.

While this research focuses on professional associations, we recognise that there are three distinct types of membership based organisations – professional associations, industry bodies and charitable organisations – that have different characteristics and value proposition for members. We will be conducting separate research for each of these. This report examining professional association membership is the first of the three.

Respondents in the [Associations Matter: 2013 State of the Sector Study for Professional Associations](#) have been drawn from members of 23 inaugural participating associations, who all invited a full census of their members to participate. The survey was conducted entirely online; invitations to participate were distributed via email between 1 April and 31 May 2013. This report contains analysis based on 7,749 responses, received from a distribution of 48,129 surveys. This large sample provides very high reliability of results.

The survey questionnaire was designed primarily as a quantitative instrument; however respondents also had several opportunities to provide qualitative comments, which adds depth and richness to the findings and validates the quantitative results. We have drawn heavily on the qualitative feedback when reaching many of our conclusions.

The report has been written for readers with varying amounts of time to devote to the findings. Our overall analysis of the '[State of the Sector](#)' is provided in this Executive Summary. The report is then divided into seven (7) separate sections, each providing more detail on a different aspect of the membership experience. We invite you to read as little or as much as you need!

We believe the findings provide practical information that associations can use immediately to assist them with their marketing and operational strategies. The survey will be repeated periodically, which means we will be able to measure changes to deliver further insight into the demographic landscape and the opinions of individuals who choose to belong to professional associations.

An increasing need for associations

While there are signs that the traditional model of professional associations is reaching its 'use by date', a stable or increasing demand for professional associations is predicted by an overwhelming majority (92%) of members. They have suggestions for improvement, and think that some things could be done better. But overall, they recognise the value of professional associations.

Members see value in the personal services delivered by associations. While they can access vast quantities of information online, they feel overwhelmed and need someone to help them synthesise and verify the credibility and importance of the information. They want help keeping up to date with the latest news, research and legislation within their field. They also want



access to professional development programs, learning resources and networking opportunities that help them develop their knowledge and their career. They believe associations are effectively able to provide these services and are looking for their association to be the leading, authoritative source of information for their profession.

A stable or increasing demand for professional associations is predicted by an overwhelming majority of members

Members also see a growing need for advocacy services, not just to influence government policy and legislation but to promote their profession to the general public. They believe the growing complexity of legislative requirements, a more educated public and a more competitive operating environment is increasing the pressure on them. They need help keeping up with regulations and believe a large part of professional association's roles will be to ensure that standards of practice are developed and adhered to. Members, particularly older and more experienced members, see an increasing need for accreditation to enable consumers to distinguish qualified practitioners, to protect the reputation and continued viability of their industry. And they see professional associations as the ideal organisation to fill these 'good for the industry' roles.

What's keeping members up at night?

The value of professional associations lies in helping members address the industry and professional challenges they face. As a result, it is vital that associations have an understanding of the challenges their members are facing. So what is keeping members up at night?

There was a relatively even spread of opinion across this question, which is unsurprising given the variety of different industries represented by the study. And while associations may see more value in their individual results, there was some consensus.

Cost pressures are the number one issue facing members. Keeping up with information and technology are also presenting challenges. Approximately one third of respondents identify protection of the reputation of their industry as a major challenge.

Respondents agree that professional associations are effectively able to help them deal with two of the major challenges they face, keeping up with information and protecting the reputation of the industry.

Members judged associations least able to help them in the area most often identified as challenging – cost pressures. Few respondents rated professional associations as effective in helping them deal with any market related issues, such as skills shortages, increasing competition, reducing demand or cost pressures. While some associations may offer these services, for others it could represent a major opportunity to expand their offering to include products, services, discounts, technologies or other means of helping to maintain the cost of practice for members. Adopting a more economic focus could provide a way in which professional associations are able to maintain relevance and distinguish themselves from the increasing number of professional groups that individuals can belong to.

This is an area of interest and offers scope for further exploration either in future iterations of the State of the Sector Study, or through your own membership research.

Respondents agree that professional associations are effectively able to help them deal with two of the major challenges they face - keeping up with information and protecting the reputation of the industry.



Why join? How do we recruit new members?

Nearly half of all respondents (45%) in this study heard about their professional association at their university, college or other educational institution. This was not unexpected, as professional association recruitment activities often focus on attracting new graduates.

Word of mouth referrals from friends, colleagues or employers were the next most common ways that members heard about their association. This is a positive result; individuals are only likely to refer friends, associates or employees to organisations that they think provide value.

Most members heard about their professional association at their university, college or other educational institution.

But why do individuals join associations? It seems members join for information. Being kept up to date about the latest industry developments was the most often identified reason for joining by respondents across all membership segments. Professional development rates highly. Networking is also a common reason for joining across all groups; qualitative feedback frequently mentions the importance of being able to connect and share information with other professionals in their field.

Interestingly, the study finds a difference in the reasons for joining between young and less experienced respondents and older professionals in the later stages of their career. There is a definite need for clear segmentation in messaging to people at different stages of the career lifecycle.

In the early stages of their career, 54% of young members join a professional association for the information, professional development resources and networking opportunities they might access. Career information is also more important to this group than any other. They are also more likely to value and attend seminars, conferences and events. To a large extent,

they are interested in the tangible and personal benefits belonging provides. The “what’s in it for me?” has to be answered to encourage them to join.

Older members also value information and networking, but are more likely to include providing accreditation for professionals who meet specified competency criteria and maintaining standards of practice and ethics for the profession among the reasons they join. It may be that having progressed in their own career they want to be recognised as a reputable practitioner in a respected profession. They value the additional authority that accrues from belonging. They also begin to see the value of giving back.

Good for me or good for us? The association value proposition

Understanding the value and relevance of associations depends on understanding the benefits and services that members expect associations to provide. It is important also to understand how members think associations perform in providing those services; in effect whether members think they do a good job.

The [Associations Matter: 2013 State of the Sector Study](#) asked respondents to rate various services associations traditionally provide twice – firstly to understand how important the benefit or service was, and then how well they thought their association performed these functions. These services can be broadly identified as belonging to either side of the association value equation; the value that accrues to the individual (and the organisation they work for or own) and the value to the field or profession.

It seems from the feedback, and the qualitative comments, that in the main members value both of these. While personal benefits like information and professional development top the list of the most important association functions, members also value the advocacy services provided by their association. While only 6% of respondents’ rate advocacy services as a reason for joining, 93% rate the provision of these services by their own association as important or critical.



The interesting thing about professional associations is that the value they provide to the profession accrues to all who participate in the field, whether they are members of the association or not. There is an obvious 'free rider' issue. While individuals see a growing need for associations in protecting the reputation of the profession, setting and maintaining professional standards and lobbying government to ensure the interests of the field are represented, a key challenge is how associations can encourage members to pay for these services when all professionals in the field receive the benefits of these activities. Particularly when only 63% of members think their association is an effective advocate!

Access to information, learning resources and professional accreditation are services that the association can restrict to members only. These are individual services for which the association is able to charge a fee. And for a majority of members, particularly young and early career stage, these are the services that represent the 'value' of belonging to the association. Associations need to ensure these benefits and services are valued enough that a sufficient number of individuals are willing to pay for them, enabling the association to fund the activities that benefit the industry as a whole. It would seem that Australasian associations are doing a good job of this, with individuals rating their performance in the provision of information and professional development services highly.

While personal benefits like information and professional development top the list of the most important association functions, members also value the advocacy services provided by their association.

Member services – is there a better way?

Keeping members up to date with industry information and developments and providing professional development are regarded as the most important services respondents want professional associations to provide.

And it looks like associations are doing a pretty good job in providing these services. 83% of members are satisfied with the performance of their association in keeping them up to date with industry issues and 73% are satisfied that their association effectively provides professional development resources that meet their needs.

However, members believe there are improvements that can be made.

Overall, seminars and workshops that allow members to learn and hear ideas from others in their field are seen as valuable by a majority (92%) of members. Conferences that provide information about the industry are also highly valued. Likewise, online delivery is exceedingly popular. Regular newsletters that provide updates and developments in the industry and online educational resources are rated by a large majority of members (87%) as being valuable.

When asked to rate their association's service delivery, 73% of members rate it as good or excellent. However, only a small majority agree that the associations' events and resources are delivered in a suitable format, in sufficient quantity and with relevant information.

While not directly asked by the [Associations Matter: 2013 State of the Sector Study](#), qualitative feedback points to cost and location as the major reasons why associations' events and professional development offerings may not be quite hitting the mark. Too expensive is an often repeated theme in the free text feedback. Evenings and weekends might suit some busy professionals, but maybe not others. Many members suggest higher quality, international speakers would add to the credibility and value of the events and service offerings. Members who reside outside of capital cities feel left out and unable to attend, due to distance, time and cost.



The same solution to these issues is offered by many members. Web based delivery overcomes issues of cost, distance and timing. Like online newsletters, the marginal cost of webinars and podcasts is minimal. They allow members to access them at a time that is convenient to them. And members' ability to access the services is not prejudiced by where they live and work.

Web based service delivery overcomes issues of cost, distance and timing.

While members see a need for in-person conferences, seminars and networking events, online information delivery overcomes some of the major restrictions in meeting the needs of often disparate membership groups. And it enables associations to provide members with information and professional development in a format and at a time that they want. At a price they can afford.

A new way to communicate?

For associations to remain relevant, an effective communication strategy is fundamental. Members identify keeping up with information and developments in their profession as their main challenges. It is one of their main reasons for joining their association. And while information provision is rated as the area in which associations are most effective, the ease with which individuals can source and access information themselves is one of the most often mentioned reasons given by some respondents who think there will be a decreasing need for associations over the next five years.

Rather than seeing the proliferation and ease of information access as a threat to their relevance, associations need to view it as an opportunity. Members want help synthesising the massive amount of information available to them, working out what's important and deciding where they need to focus their attention. They want information to be provided at a time and in a form that suits them. They need it to be broken down into manageable chunks. They want to know it is up to date and want their association to be the

leading, authoritative source of information for their profession.

Members report actively using online media to search for information about their profession. Google is used by the vast majority of members (88%), webinars are widely used and private social networks and social media are gaining traction. Mobile apps are frequently mentioned by respondents of all age groups in the qualitative feedback. However, different groups have different preferences and usage patterns.

Digital communications provide a massive opportunity as a mechanism for associations to keep members up to date about developments in the industry, meet the demand for professional development and to facilitate opportunities for members to network with each other – the main reasons they join their association in the first place. Online media is seen as particularly important to facilitate provision of professional development and associated resources to members living outside capital cities who are unable to physically attend association events.

The challenge for associations is to integrate all of the communication channels available to them and to provide a tailored, engaging member experience. Qualitative feedback indicates that many associations are struggling to adapt to the digital world.

Respondents want their association to be the leading, authoritative source of information for their profession.

To maximise the potential offered by online media, member feedback suggests that associations need to ensure their website is up to date and provides an engaging user experience. They need to ensure it is contemporary and provides a content rich hub that offers varied communications including articles, webinars and podcasts by the industry's most insightful and respected practitioners and thought



leaders. It means curating the information so that members know that they are up to date with what is really important to both their industry and their own professional development. And it means using online communication methods to take advantage of its capability to deliver timely information in the myriad ways that may suit different groups of members to deliver a premium membership experience that will truly engage their members.

Does engagement need to be redefined?

Historically, member “engagement” has been viewed by associations as loosely equating with involvement - attending events and seminars, presenting papers and/or exhibiting at conferences, volunteering time or becoming leaders, board members and advocates for the association. Engaged members participate; they contribute.

However, should the definition of member engagement be reconsidered? This study shows that an individual’s preferences for services and their likely involvement with an association will vary based on their stage of life – their age, career stage or the organisation they are working for. It may vary based on their capacity to participate, possibly due to financial, geographic or time constraints. It is also very likely to vary in terms of the form it takes, with many professionals choosing to define their involvement via contribution to online social forums, rather than by direct participation in association activities.

These different levels or forms of involvement do not necessarily mean that members are not “engaged” with their association, that they do not benefit from the services provided by their association or feel a sense of belonging. To some extent this is supported by the higher engagement and satisfaction levels reported by members living outside of capital cities, those with less capacity to be involved in the traditional sense.

While this study does not seek to provide a firm definition of engagement, a number of questions were asked to provide a sense of how members feel about belonging to their

association, whether they participate or not. The most important finding in relation to member engagement is that 76% of members are proud to belong to their association. And 71% agree that their association is respected in their industry. These outcomes, or indicators, of engagement are fairly positive. Despite this, only a small percentage of members agree that their association demonstrates the behaviours that drive engagement and make members feel like they belong to a community.

Associations can cultivate engagement by giving members the opportunity to participate in the ways that works for them. Some members will want to attend events and be actively involved with their association. For others membership is a simple service contract; they pay their fees and expect to receive information in return. Other members will want to participate in online forums that let them make connections, ask questions and share their ideas and knowledge.

76% of members are proud to belong to their association

For associations to best engage with their members, it is important to not only provide a variety of options but also to promote those options – ask your members what they want, seek to understand their needs and let them know what is available to them.

But are they satisfied, will they renew and do they recommend joining?

The answer to the first two questions is a resounding yes! Over 90% indicate an intention to renew, and 73% are satisfied with their membership.

Membership growth depends on retaining existing members and attracting new ones. In the first instance, it is critical that associations, with some exceptions for low tenure membership, prioritise retention. While retention appears to be ok, these figures will differ across each individual association, and may need to be tested further. Fees and perceived lack of value are the main reasons why members choose not to renew.



The key then, is to attract new members. Educational institutions are the logical place for recruitment; however, part of the strategy must also focus on the very valuable word of mouth referrals. Associations appear to be doing this quite well – 24% of respondents heard about their association through friends, colleagues or their employer and an overall Net Promoter Score (NPS) of 2% indicates that those members providing positive word of mouth referrals exceeds those who would not recommend their association. Of course, these scores will differ across individual associations.

Over 90% of respondents indicated an intention to renew.

Based on the findings of the current study and the comments provided by members, some of the factors that are important in members' decisions to renew their membership and recommend their association may include:

- A strong feeling of connection / engagement
- A sense of trust in the association to promote and protect the reputation of the profession
- A belief that the association enhances their credibility
- A belief that the association is the leading source of knowledge and best practice

Future studies will address these elements in an effort to understand whether these more intangible aspects play a part in membership satisfaction, renewal and likelihood to recommend.

Where to from here?

Members have indicated there is an on-going need for professional associations. This is very positive, but what worked in the past will not necessarily work in the future.

Associations who cannot adapt will struggle to remain relevant. Members have more choices and are less reliant on associations who don't deliver what they need, when they need it. Associations need to reinvent themselves and look to other types of organisations to provide a model for the way they provide their services.

No longer just providers of member services and discounts, associations need to look to the practices of leading digital publishing houses, educational institutions and marketing agencies. They need to cultivate their reputation as the authoritative source of knowledge, with access to the most up to date and trusted sources of information and training in the industry. The professional association of the future needs to be a journalist, an editor, a digital content manager, a researcher, a trainer and a curator – gathering, synthesising and providing quality information and learning resources for their members and disseminating it in a timely and appropriate manner. Appropriate to members that is - not what is convenient for the association! This means segmenting your database, knowing who wants news and information via paper, who wants it from email and who wants to 'pull' information from various social media channels at a time convenient to them.

Associations also need to be more proactive in advocating for their respective profession – not just lobbying government about legislation and policy, but positively representing the profession to the general public and emphasising the need for qualified, registered practitioners. Professional standards and ethics is a recurring theme in the research. The payback for the association is in an increased demand for quality professional development services that enable individuals to acquire and maintain professional accreditation. This provides 'stickiness' for associations – members need to belong to remain accredited.

This is a big challenge! To be able to rise to it associations will need to employ the appropriate resources to deliver their services – IT professionals for database and app development, researchers for latest news, writers to deliver content, and trainers to provide professional development – either through direct employment or outsourcing to others.

If associations are going to recruit, engage and retain members in the future, they must adapt and evolve. They must keep up.



ABOUT THIS REPORT

Methodology and sample

The [Associations Matter: 2013 State of the Sector Study](#) was open to all Australian and New Zealand professional associations. This particular study was designed for members of professional associations, whose primary focus is in offering services such as education and training, knowledge sharing, networking and advocacy on behalf of individuals.

Respondents in the [Associations Matter: 2013 State of the Sector Study for Professional Associations](#) have been drawn from the members of 23 inaugural participating associations. Due to often large variations in the size of each of the participating associations, all participating associations invited a full census of their membership base to participate. Using a census approach also allowed us to meet one of our objectives that smaller associations, who represent such a large segment of the sector, could access the benefits of membership research. Invitations to participate were distributed via email only, between 1 April and 31 May 2013.

The survey was conducted using a quantitative, online instrument. This allowed us to reach a much larger audience, and to ask a larger number of questions than is feasible using qualitative methods. There were also several opportunities for respondents to provide free text or qualitative comments, to expand or explain their answers or to offer their ideas and suggestions.

This report contains analysis based on 7,749 responses, received from a distribution of 48,129 surveys. This very large sample size results in a 99% survey confidence that the sample represents the population of professional association members in Australasia, with a reliability of plus or minus 2 % around the results. It also provides high reliability among each of the sub-groups that are referred to throughout the report.

Graphs and tables showing the quantitative findings are shown for all of the questions. Some figures may not add to 100% due to rounding.

Despite the robust sample size, due to the voluntary participation by associations and the data collection methodology, the [Associations Matter: 2013 State of the Sector Study](#) respondent profile skews slightly to those in the health services industry. As a result, we suggest you view the results as strongly directional of the views of all professional association members.

Report structure

The [Associations Matter: 2013 State of the Sector Study](#) was designed to answer the most important issues facing professional membership based associations. It examined a range of factors pertinent not only across the whole sector, but also to the individual associations participating.

Survey data has been analysed by respondents' age groups and their career stage, and significant differences between the opinions of these groups are highlighted through the report. We have also reviewed feedback by respondents' location, employer type and whether their membership fees are paid by themselves or their employer. Where these results are interesting or add value they are also identified in the report. For ease of reference, where we refer to differences of opinion between these groups they are included in a shaded box.

We also refer to the qualitative or free text comments throughout the report. Whilst no attempt has been made to quantify these comments or to determine whether certain subjects or comments appear more frequently (other than our general observation), their presence adds richness to the feedback and often validates the quantitative data. Their inclusion also ensures that the members' voices are heard and provide some interesting suggestions for associations.



The report has been written for readers with varying amounts of time to devote to the findings. Our overall analysis of the ‘State of the Sector’ is provided in the Executive Summary. The report is then divided into seven (7) separate sections, each focussing on a different aspect of the membership experience. Each section contains a summary of the findings on the first page, followed by the detailed results from the quantitative questions asked of members, any significant or interesting differences between member groups, as well as any relevant qualitative feedback that supports, or explains, the data.

For ease of reference, the table below provides a guide for the overall structure of the report, as well as the relevant page numbers for each chapter.

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Top Sector Performers	Page 82

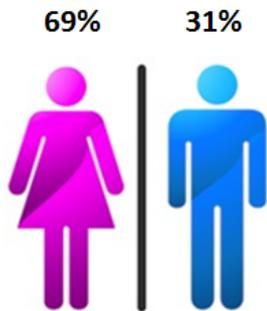
Participating associations

The following associations took part in this Study, representing a wide cross section of industries.

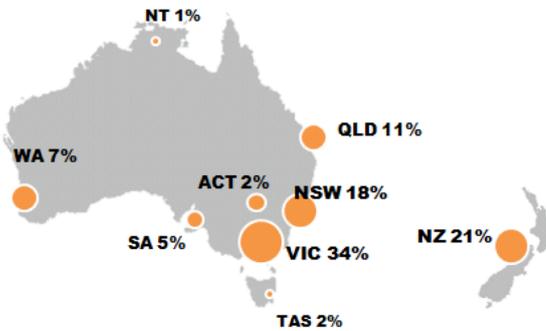
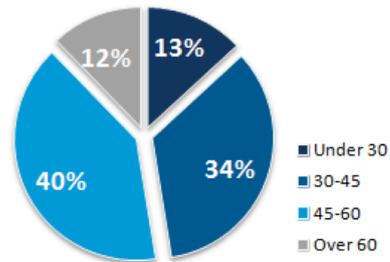
- Association of Queensland Nurse Leaders (AQNL)
- Australasian Society of Association Executives (AuSAE)
- Australian College of Children and Young People’s Nurses (ACCYPN)
- Australian Dental Association (Victorian Branch) (ADAVB)
- Australian School Library Association (ASLA)
- Australian Sleep Association (ASA)
- Australian Society of Sports Administrators (ASSA)
- Career Development Association of Australia (CDAA)
- Chartered Institute of Logistics and Transport Australia (CILTA)
- CRANApplus
- Design Institute of Australia (DIA)
- Library & Information Association of New Zealand Aotearoa (LIANZA)
- Mathematical Association of Victoria (MAV)
- Migration Institute of Australia (MIA)
- Museums Aotearoa
- National Speakers Association of Australia (NSAA)
- New Zealand Association of Occupational Therapists Whakaora Ngangahau Aotearoa (NZAOT)
- New Zealand College of Clinical Psychologists (NZCCP)
- New Zealand Veterinary Association (NZVA)
- Occupational Therapy Australia (OTAus)
- Real Estate Institute of New South Wales (REINSW)
- Royal Australian Chemical Institute (RACI)
- Speech Pathology Australia (SPA)



Participant profile



Age of Members



42% outside Capital City

58% Capital City

Career Stage	%
Entry Level	11%
Mid Level	23%
Senior Level	58%
CEO, Director, Board	8%
Sample Size	7,749

Salary Range	%
Less than \$35,000	10%
\$35,000 – \$50,000	10%
\$50,001 – \$75,000	25%
\$75,001 – \$120,000	32%
\$120,001 – \$175,000	7%
Over \$175,000	5%
I'd rather not say	11%
Sample size	7,749

Employer Organisation	%
Private Sector	45%
Government	32%
Non Profit Organisation	7%
Academia/Educational Institution	16%
Sample Size	7,749

Industry Sector	%
Medical & Allied Health	39%
Business Services	26%
Education	17%
Science	9%
Transport	4%
Law	4%



1. ASSOCIATIONS:

Can they help and do we need them?

The association sector is facing an increasingly challenging environment. With a changing demographic landscape, associations are concerned about their future. Will there be a continuing need for associations? What are the major challenges facing professionals in their industry? What role will associations play?

To find answers to these overall questions, the first section of the [Associations Matter: 2013 State of the Sector Study](#) asked respondents about the future need associations, the challenges they face in their profession and whether they think professional associations are able to assist them in dealing with these challenges. It provides associations with a blueprint to guide them in the often difficult decisions involved in deciding where they should be concentrating their effort to provide most benefit to their members.

"(This report) provides associations with a blueprint to guide them in the often difficult decisions involved in deciding where they should be concentrating their effort to provide most benefit to their members."

Section summary

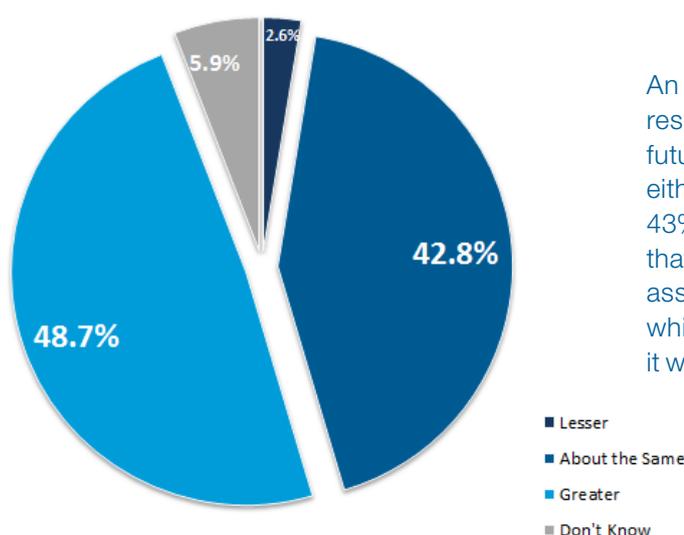
- An overwhelming majority of members believe the need for associations will stay the same or increase – 49% of members predict an increasing demand for professional associations and a further 43% believe the need will stay the same, with younger members more likely to report an increasing role for associations.
- Cost pressures and keeping up with information and technology are the most often identified challenges facing members'. Approximately one third of respondents also identify protection of the reputation of their industry as a major challenge.
- Respondents agree that professional associations are effectively able to help them deal with two of the major challenges they face, keeping up with information and protecting the reputation of the industry.
- Very few members think associations are able to help them with the cost pressures and other market related issues they face.
- In the qualitative feedback, members indicate a growing need for advocacy services, not just to influence government policy and legislation but to promote the profession to the general public.



Is there a future need for professional associations?

Respondents were asked whether they thought there would be a greater or lesser need for professional associations over the next five years. The response provides great news for the sector!

Do you think there will be a greater or lesser need for associations 5 years from now? (n=7749)



An overwhelming majority of respondents thought that the future need for associations will either stay the same or increase. 43% of respondents believe that the need for professional associations will stay the same, while almost half actually believe it will increase.

What do different groups think?

- Young members were more likely than older members to report an increasing role for associations, with 53% of members in the youngest age category indicating that the need for associations was likely to increase over the next five years.
- Professionals working within the government and not for profit sectors are more likely to think there will be a greater need for associations in the future, at 52% and 51% respectively.
- Respondents living outside of the capital cities are also more likely than those living in capital cities to believe there will be a greater need for associations over the next 5 years.

"Despite industry concerns about the increasing difficulty recruiting and retaining younger members, it is this age group that see most need for the services of professional associations in the future!"



Respondent comments

After indicating whether they thought there would be a greater or lesser need for associations in the future, respondents were asked to provide a reason for their answer. This question provides some of the most interesting feedback of the study and provides the introduction to our understanding of what members are really wanting from their professional association.

I need my association – why?

Ensuring the maintenance of standards was the most often mentioned reason for an increasing need for professional associations. Respondents indicated that the pace of change and increasingly complex operating environment were creating a greater need to maintain standards and recognise practitioners of calibre to protect both consumers and the reputation of the industry.

“I think professional standards are increasingly important and the role of the association will expand in the future especially in terms of promoting and protecting the profession.” (Member, 46-40)

“As information becomes more readily available to the public there will be a need to ensure quality of service is provided by qualified professionals. Associations are one way to maintain this quality of service.” (Member, 30-45)

“It is becoming very easy for anyone to set themselves up as an ‘expert’ in any field and to promote ignorant and misleading contributions to the public domain. Integrity of qualifications and legitimacy of opinion requires credentials and rigorous filtering monitored by professional associations.” (Member, 46-60)

The need for a collective voice to advocate for the profession, navigate and keep members’ abreast of an increasingly complex and changing legislative environment and to help secure funding in an era of budget cuts were also frequently mentioned.

“Lobbying will become a bigger factor in national and state politics and we will require professional associations to represent their members’ and possibly the public’s interests.” (Member, under 30)

“Increased regulation and scrutiny from all aspects of society i.e., government, public and media. All professions will need a functioning and influential controlling voice.” (Member, over 60)

“With increasing regulation, it will be more difficult for a clinician who owns a small business to keep abreast of new information or policies. We will need an association to voice our concerns and act on our behalf to ensure we get a fair deal.” (Member, 30-45)

Interestingly, a large number of respondents thought the need for associations would increase for exactly the same reason that many respondents predict a decreasing need – the proliferation of information and social networking! Respondents indicated feeling overwhelmed by the sheer amount of information available and are looking to their association to filter it and keep them up dated with only the information that is credible, relevant and important.

“Because with so much ‘information’ available on the web there will be a greater need for a professional association so that that people can know they can trust information from accredited members of that association.” (Member, 46-60)



“Information overload - need professional associations to act as a sieve and share the best information only.” (Member, 30-45)

“The expansion of knowledge is expanding exponentially with the internet. A good professional association would facilitate and centralise the required knowledge for the field.” (Member, 46-60)

A lesser need for associations – why?

While representing only 3% of respondents, members who indicated that there will be less need for professional associations often mentioned that increased availability of information and learning resources online is diminishing the role of associations.

“Greater access to quality information outside of the association.” (Member, 30-45)

“As the information is more freely available through the internet, professional associations as a platform of information sharing become less important.” (Member, 46-60)

“Resources and educational opportunities available globally, often accessible via webinars these days, and content provided by universities.” (Member, 30-45)

Social media was also often seen as a threat to professional association’s viability, with individuals able to form their own groups of individuals with shared interests and information needs.

“Easier to communicate /share with other colleagues without the need for organised associations” (Member, 46-60)

“People are now capable of forming and locating their own online communities of colleagues with similar needs/interests etc. “ (Member, 30-45)

“I think that (there) will be a lesser need for professional associations in the future because of the growing number (of) domestic and international social-networking sites offered to individuals on the worldwide web.” (Member, 30-45)

Respondents also frequently mentioned the generational impact on associations, that up and coming professionals are less interested in joining a professional association.

“The notion of professional collegiality and cooperative spirit appears to be waning”. (Member, 46-60)

“I found most of the new graduates not thinking to join a professional association unless it is one of the essentials in job applications.” (Member, 46-60)

“The younger generation coming through don’t see them as necessary and therefore won’t buy into membership.” (Member, 30-45)



What do members think are the challenges facing their industry?

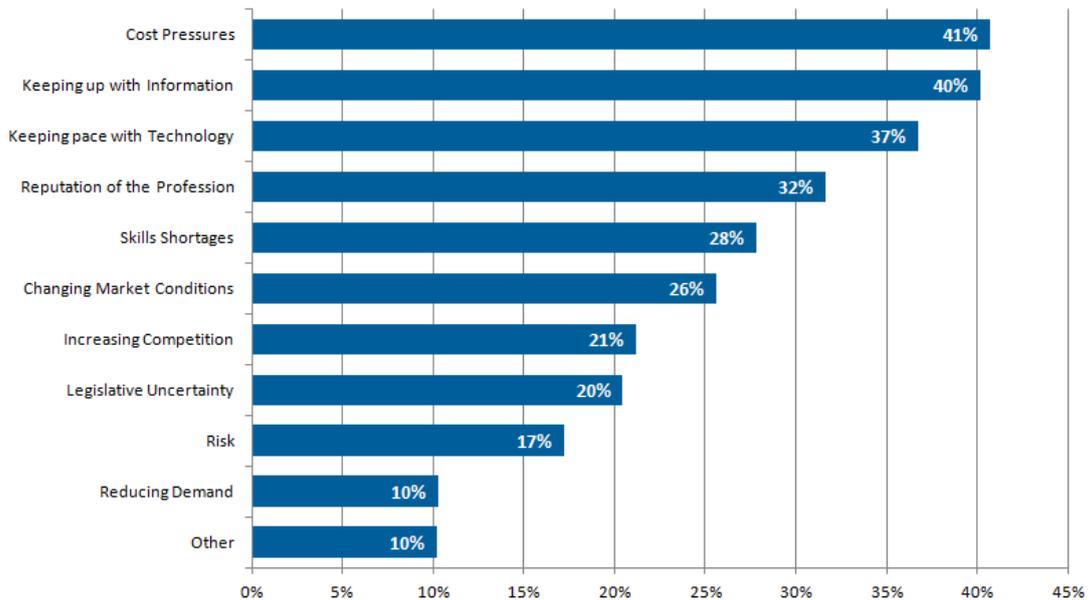
The value of professional associations lies not only in providing members with products and services, but in helping them to address the industry and professional challenges they face. As a result, it is vital that associations have an understanding of the challenges their members are facing. What is keeping them up at night?

To assist professional associations in this area, the [Associations Matter 2013 State of the Sector Study](#) asked a number of questions to probe the issues, and how professional associations might (or might not!) be able to assist them.

The first part to this section offered a list of ten (10) generic industry challenges, and respondents were asked to select the top three (3) confronting their field or profession. The challenges listed were some of those services that associations usually provide, as well as general market and economic challenges.

In presenting the results, responses have been calculated to show the percentage of respondents who selected each challenge.

What are the top 3 challenges facing your field or profession? (n=7749)



"Recognition of qualified practitioners in an ever expanding and educated market is cited frequently as necessary to protect both consumers and the reputation of the profession."



While there was a relatively even spread of opinion across this question, which is unsurprising given the variety of different industries represented by this sample, more respondents' rate cost pressures, keeping up with new industry information and keeping pace with technology among the top 3 current challenges facing their field or profession.

What do different groups think?

- Young and early career stage members are more concerned about the challenge of keeping up with information than older, more experienced members. 43% of respondents in the youngest age group and 47% of entry level professionals included keeping up with information as a challenge to their field or profession. This compares to 40% of respondents overall and only 29% of CEO/Board level executives.
- Young and less experienced members are less likely than respondents overall to believe keeping up with technology is one of the major challenges facing their field or profession, with only 31% of respondents aged under 30 and 25% of entry level respondents including technology in their top 3 challenges. This compares to 41% of respondents aged over 45 and 40% of respondents who identified as senior professionals.
- Experienced members are more likely to be concerned about skills shortages in their profession. While only 16% of entry level respondents included skills shortages as one of the top three challenges facing the profession, 32% of senior level professionals are concerned about ensuring there are sufficient skilled professionals in their field.
- Young and less experienced members are likely to be more concerned about increasing competition in their industry than other respondents, with 27% of respondents aged under 30 and 29% of entry level respondents listing it as a top challenge for their industry. Respondents who identified as CEO/Board level executives were also more likely to be concerned about competition.
- While there was concern about the challenge of keeping up with new information across all employment sectors, respondents in government and academic positions are more likely to be concerned with the challenges posed by keeping up with technology than their private and not for profit sector counterparts.
- There were few differences in the concerns of respondents residing in or outside the capital cities

"Members feel overwhelmed by the quantity of information available."

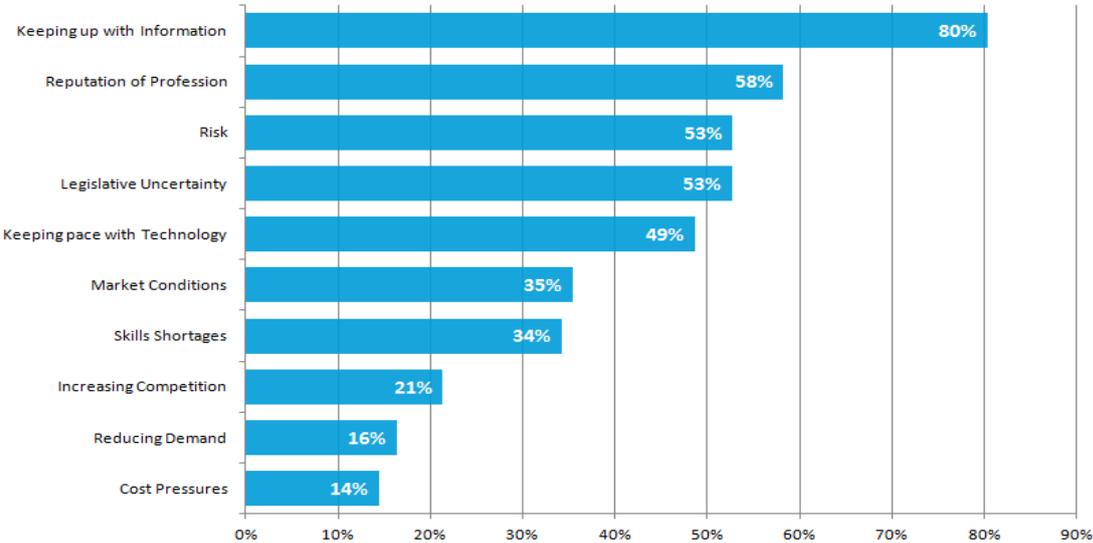


Can associations help members address these challenges?

After identifying the main challenges, respondents were then asked to rate the effectiveness of professional associations in helping members to address or overcome these challenges, on a five (5) point scale from very ineffective through to very effective. Associations' effectiveness ratings are presented as a top 2 box score, or the percentage of members who rated associations as effective or very effective in helping to address these challenges.

How effective do you think professional associations are in helping members address these challenges? (n=7749)

(Top 2 Box Rating)



Associations are judged most effective in helping members keep pace with new information about the industry. A majority of respondents (80%) rated associations as either effective or very effective in helping them in this challenging area. The strength of associations in this area most probably reflects information provision as being one of the traditional roles of professional associations, and the continuing tendency of associations to focus on this aspect of their service offering. As it is among one of the most often identified challenges, this is a strong positive finding for associations.

While associations were judged as less effective in helping respondents with the other challenges they face, they were perceived to be effective by a small majority of respondents in the areas of protecting the reputation of the field or profession, helping members to mitigate or manage risk and in addressing legislative uncertainty. Nearly half of respondents also agreed that they could effectively help them deal with technology changes.

Few respondents rated professional associations as effective in helping them deal with market related issues, such as skills shortages, increasing competition, reducing demand or cost pressures. These may be challenges outside of the scope or ability of professional associations to respond or assist. It may also be that members do not expect their assistance in this area. Alternatively, adopting a more economic view could offer a way in which professional associations are able to re-orient their focus and service offering to maintain relevance and distinguish themselves from the increasing number of social and professional groups that individuals belong to.



What do different groups think?

- Young and entry level professionals are more likely to agree that professional associations are effectively able to assist members in addressing most of the challenges they face than older, more experienced members.
- While entry level respondents are slightly more likely to think professional associations are most effective in helping them keeping members up to date with developments in the field, there was little difference in opinion across any of the other demographic groups or segments.
- Young and less experienced respondents are more likely to agree that professional associations are well placed to effectively help them maintain the reputation of their field.
- Members aged over 60 are the group least likely to think professional associations are able to help members deal with the uncertainty of legislative change.
- Respondents reporting as C-level or Board executives are less likely than other groups to think professional associations are able to help them deal with unpredictable market conditions, skills shortages and cost pressures.
- Respondents working for not for profit organisations are more likely to agree that professional associations are able to effectively help them deal with skills shortages in their field than members in other employment sectors.
- There is little difference in the perceptions of members living in or outside capital cities, with the exception that members living outside capital cities believe associations can help them with the issue of reducing demand.

Gap analysis - are associations good at the right things?

To determine whether professional associations are targeting their services in the areas that are of most benefit to members, the list of industry challenges identified by members were ranked according to the most often mentioned. An effectiveness ranking was then generated by calculating the mean score for the effectiveness of associations in dealing with each challenge and ranking the scores from highest to lowest. The percentage of respondents who rated professional associations as effective or very effective in helping members deal with each challenge were also calculated and are displayed alongside the effectiveness ranking.



Industry Challenges	Top 3 Industry Challenges	Effectiveness Ranking	% Respondents Rating Associations Effective
Cost pressures	41%	10	14%
Keeping up with new information	40%	1	80%
Keeping pace with technology	37%	5	49%
Reputation with the industry / profession	32%	2	58%
Skills shortages in the field or profession	28%	7	34%
Rapidly changing, difficult to predict market conditions or trends	26%	6	35%
Increasing competition	21%	8	21%
Legislative uncertainty	20%	4	53%
Risk management / risk exposure	17%	3	53%
Reducing demand for product or service	10%	9	16%
Other	10%		
Sample size	7749		
Total mentions	21844		

The good news is that respondents agree that professional associations are effectively able to help them deal with two of the major challenges they face, keeping up with information and protecting the reputation of the industry. These are also the two major themes running through members' reasons for believing there will be an increasing need for associations in the future.

One of the more unexpected findings to come out of the survey is that members judged associations least able to help them in the area most often identified as challenging. More respondents included cost pressures as one of the top three challenges facing their field than any other issue. However, only 14% of respondents rated professional associations as effective or very effective in helping members address this challenge.

What is unclear from the results is whether or not members expect professional associations to assist with the costs of practising their profession. It may be that members do not expect associations to help them in this area, or that associations judge themselves unable to provide this type of support to members.

"Respondents agree that professional associations effectively help them with two of the major challenges they face, keeping up with information and protection the reputation of the industry."



2. RECRUITMENT & JOINING:

Why do members join?

How can we attract new members? Why do individuals join associations? How do we reach young members? These are the most often asked questions by professional associations!

The next part of the [Associations Matter: 2013 State of the Sector Study](#) sought to find answers to these questions. By asking members across the sector about their specific association membership, we wanted to find out how most members found out about their professional association, what their individual reasons for joining were, how many professional associations they belong to and the key benefit membership provides them.

With over 7,700 responses we are also able to segment the feedback into meaningful membership categories – to find out how the responses to these questions vary by age, career stage and location and employer type. This enables us to provide associations with real direction as to how promotion and recruitment activities might be tailored to appeal to the needs and preferences of different groups.

The findings suggest an interesting and ongoing role for professional associations, whereby services can be targeted to members at varying stages of their profession. In the early stages of their working lives, member recruitment and service provision strategies should focus on the creation of quality professional development and information service offerings that help members on their initial journey in the field. As they become more experienced, members are more likely to want to convert the knowledge and skills they have developed into accreditation which recognises and rewards their participation in their field, whilst protecting the credibility and reputation of the profession.

"The findings suggest an interesting and ongoing role for professional associations, whereby services can be targeted to members at varying stages of their profession."

Section summary

- A majority of members in this study heard about their professional association at their educational institution.
- 24% of respondents heard of their association through friends and associates, or from their employer.
- Access to information was the most often cited reason for joining their professional association.
- Young and early career stage members overwhelmingly join for the tangible, personal benefits that accrue from membership. These members value the information, professional development resources and networking opportunities they can access as members of a professional association.
- While older and more experienced members also join for access to information, they are more likely to join to demonstrate their commitment to the profession, to obtain professional accreditation and for networking opportunities than younger members.
- The credibility that membership provides is also important to members, across all age ranges.

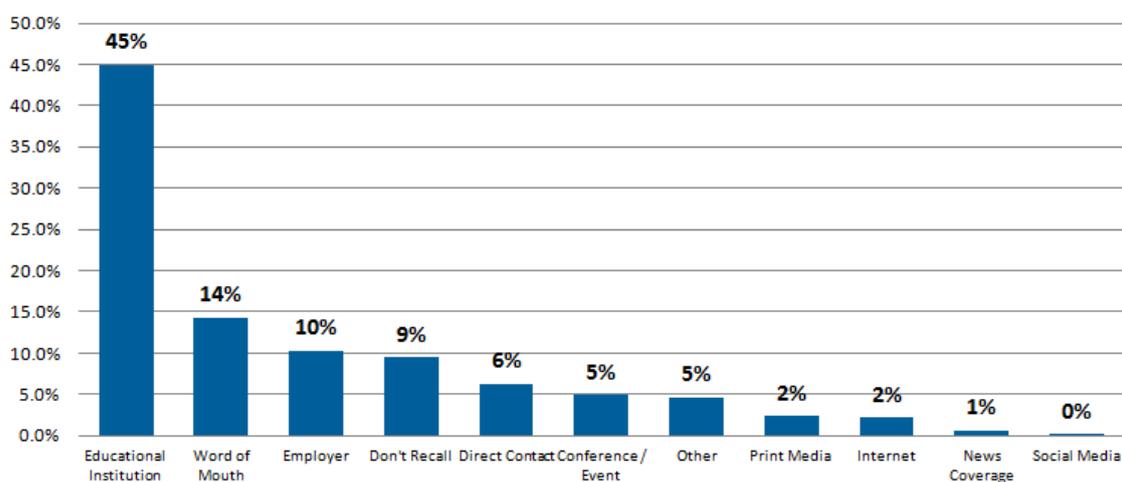


How do individuals hear about associations?

The first stage of attracting new members is promotion. How do associations let people know they exist?

To find out, respondents were asked to indicate how they first heard about their professional association. They were provided with nine (9) possible methods and asked to provide one response only. Findings are presented as the percentage of respondents who heard about each of the methods provided.

How did you first hear about the association? (n=7749)



The majority of members first hear about their professional association at their educational institution. This reflects the practice of many professional associations concentrating their recruitment activities on participation in university information sessions, exhibitions and 'open days'. It is also possibly reflective of the composition of the survey sample, which includes a large number of allied health and medical professionals, whose ranks would mainly hail from a university educated demographic.

Positively, 24% of members also heard about their association via their employer or through colleagues or friends. Having members learn about their association through word of mouth is very good for associations, as individuals are only likely to refer employees, friends or colleagues to organisations that they feel provide value.

"The majority of members first hear about their professional association at their educational institution."



What do different groups think?

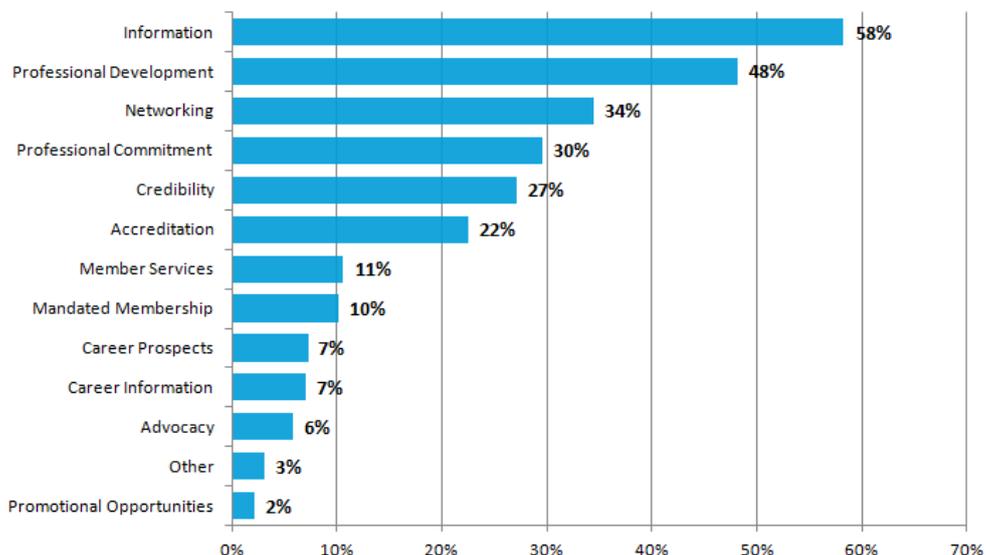
- Young and less experienced members are much more likely to hear about their association at university or college; 72% of members under 30 and 68% of early career stage members' first hearing about their association in this way. The percentage of members' first hearing about their professional association at university steadily decreases with age, perhaps reflecting greater effort by associations into university recruitment activities in recent times.
- The percentage of members hearing about their association via word of mouth steadily increases with age, from 9% of members under 30 through to 21% of those over 60. This pattern is repeated in analysis by career stage.
- Older and more experienced members are also more likely to first hear about their association through direct contact from the association itself.

What are members' reasons for joining?

Once individuals have heard about their professional association, how can the associations convince them to join? Are individuals' reasons for joining based on the key functions they expect associations to provide, or are there also emotional reasons for wanting to belong? Is belonging to a professional association simply a contract for services, or is there deeper emotional reason for, and benefit from, belonging to their association? Do members' join for personal benefit, or does contributing to the profession to which they belong motivate their reason to associate?

To answer these questions, the next section of the research asked respondents to indicate why they decided to join. Twelve (12) generic reasons were provided and respondents were asked to select up to 3 reasons that were important in their decision to join. Reasons for joining are ranked according to those most often mentioned by respondents.

Why did you decide to join the association? (base n=7749, n=20630)





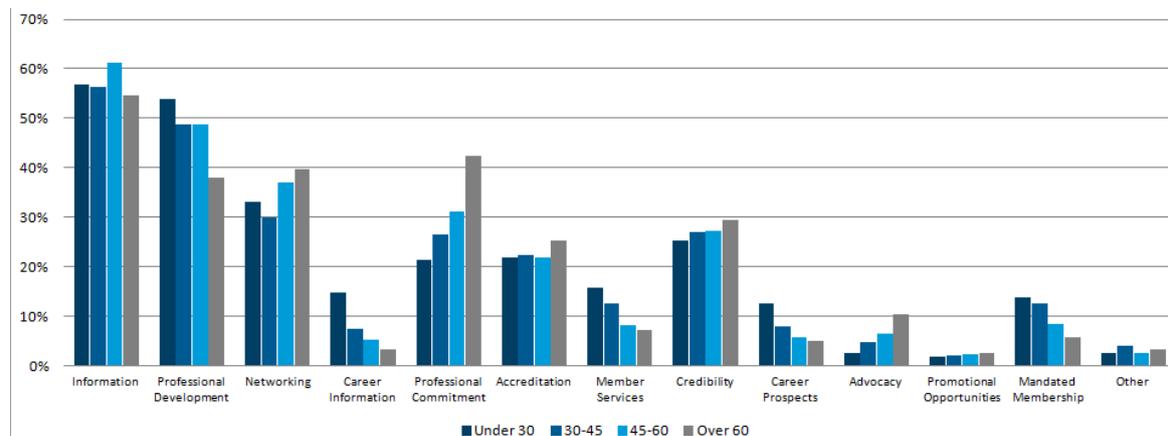
At first glance, personal reasons for joining predominate. Members want access to the latest industry information and professional development resources provided by their association.

The next set of reasons for joining, however, related to the less tangible services and benefits provided by associations – the networking opportunities, credibility and accreditation that flow from belonging to the association. Members want to demonstrate their commitment to their profession.

What do different groups think?

- Being kept up to date with information and developments about their field or profession is the often given reason for joining often across all age groups, with members between 46-60 more likely to select this as their reason for joining (61% compared with 58% overall)
- Apart from being kept up to date, reasons for joining their professional association vary significantly by age.
- 54% of younger members join for access to professional development resources, compared to 48% overall. Being in the early stages of their career, they join with the expectation that their association will help them learn, improve their skills and develop their career.
- Older members are more likely than other groups to have joined to demonstrate their commitment to the profession (42% compared with 30%) and to network with others in their field (40% versus 34%). They also join to obtain professional accreditation and for the credibility that membership provides (25% and 29% respectively).
- Private sector professionals are more likely than individuals working in other employment sectors to join for the credibility that membership provides (30% compared to 27% overall).
- Academics are more likely to join for the networking opportunities than individuals in other employment sectors (44% compared with 34%).
- Members living outside of the capital cities are more likely than their capital city counterparts to join for access to information (61% compared with 58%) and professional development resources (51% compared to 48%).

Reasons for joining by age (base n=7749, n=20630)

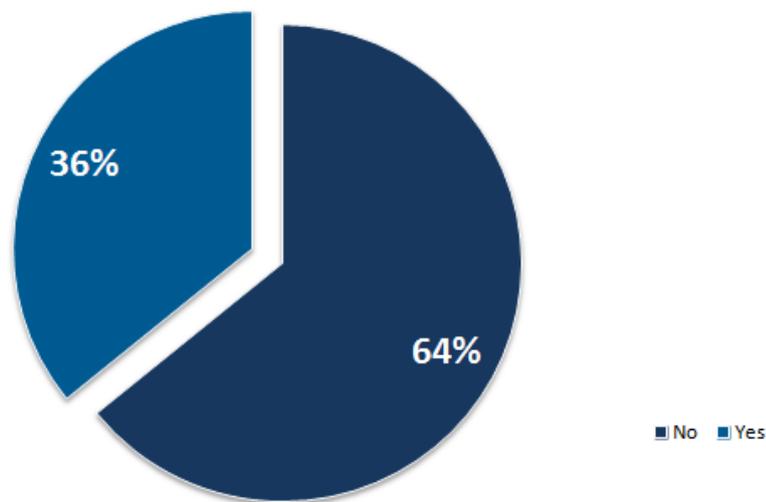




Do members belong to multiple associations?

The majority of members indicated that they belong only to the association who invited them to participate - only 36% of members belong to more than one association. This is good news for the participating associations, as it indicates a loyal membership base who are perhaps obtaining all of the benefits and services they expect to be provided from their association.

Do you belong to any other professional association? (n=7749)



What do different groups think?

- Members under 30 were significantly less likely to belong to more than one primary professional association, with only 19% belonging to another professional association. This is most likely a function of the cost of belonging, with younger members more likely to have limited financial resources during the early stages of their career.
- New Zealand residents were less likely to belong to more than one association than their Australian counterparts, although this may be a function of population and / or the number of associations operating in the field.



Respondent comments

What benefit does belonging provide?

As expected, most members cited access to information, news and professional development as one of the key benefits of belonging to their association.

*“Up-to-date information about emerging trends, practices and legislative changes, a comprehensive representation across practically the whole of the field of [my profession]”
(Member, over 60)*

*“Access to other associated professionals and information/ events associated with them”
(Member, 30-45)*

“Access to relevant professional development and networking opportunities.” (Member, 30-45)

They also talked about the feeling of ‘belonging’ – a connection with like-minded professionals and the collegiality that being a member of a professional association provides.

“The ability to network with other professionals in my particular field” (Member, under 30)

“A feeling of ‘connectedness’ to the profession.” (Member, 30-45)

“Continuous support with relevant information and comradeship of colleagues” (Member, over 60)

Members also frequently mentioned advocacy on behalf of their profession, and the authority and credibility that belonging afforded them.

“Because it is an organisation dedicated to our profession and advocates publicly for the work that we do. Having a professional organisation also gives the profession due credibility in the wider world and can help justify our existence in an ever changing environment.” (Member, 46-60)

“It provides membership of an organisation that has a strong code of ethics that provides information based on what is best for the customer, the profession & you as a whole without a commercial self-interest.” (Member, 46-60)

*If [Association Name] is a strong organization, we will have a stronger voice to lobby, inform and influence government and the wider community about issues that are important”
(Member, under 30)*





3. ASSOCIATION FUNCTIONS:

The value proposition

Understanding the value and relevance of associations depends not only on understanding the benefits and services that members expect associations to provide, or even the reasons why they join. It is important also to understand how members think associations perform in providing those services; in effect whether members think they do a good job.

Survey Matters conduct strategic gap analyses on most of the membership surveys we conduct and find it a very useful way to both help associations ensure that their core competencies align with the needs of their members and to ensure the quality of their service delivery is meeting members' expectations.

To do this, the survey asked members to identify how important the various services provided by their association are to them, and then asked them to rate the effectiveness of their association in providing those services. Mean scores are calculated for both the importance and performance dimensions and the difference between the members' ratings are then calculated to ascertain the difference between importance and performance. Survey Matters refer to this as the "Performance Gap".

Those areas that have a large gap between the Importance and Performance scores indicate potential areas for corrective action. Where the gap is negative, the mean score for importance exceeds that for performance. Where the gap is positive, the performance rating exceeds the importance rating. Areas with high importance and low performance provide the greatest opportunity for improvement. For an issue to warrant concern and/or attention, however, it must be an area that respondents consider important. If an issue is not important to respondents, resources could be more effectively utilised elsewhere – even if there is a large performance gap.

While these results are interesting at an overall sector level, they provide the most benefit for individual associations looking at their own results. Sometimes the averaging of results across associations and industries can mask the findings for individual associations.

Section summary

- Information provision and professional development dominate as the most important functions of associations, with 97% and 92% (respectively) of members rating these items critical or important.
- Respondents are relatively satisfied that their association is effectively meeting their needs in both these areas. 83% of respondents are satisfied that their association keeps them informed about developments in their field and 73% of respondents are satisfied that their association provides quality professional development programs and learning resources.
- Whilst members do not join their association to assist with advocacy efforts, an overwhelming majority (93%) believe it is a critical or important function of the association. However, only 63% of members are satisfied with their associations' advocacy performance.
- There are no large performance gaps across any of the strategic functions tested by the survey.

"Areas with high importance and low performance provide the greatest opportunity for improvement."



What do members want their own association to provide?

In this section of the survey, respondents were asked to consider the list of functions provided by associations in relation to the benefits and services provided by their own association.

The list of functions can be broadly organised into two areas:

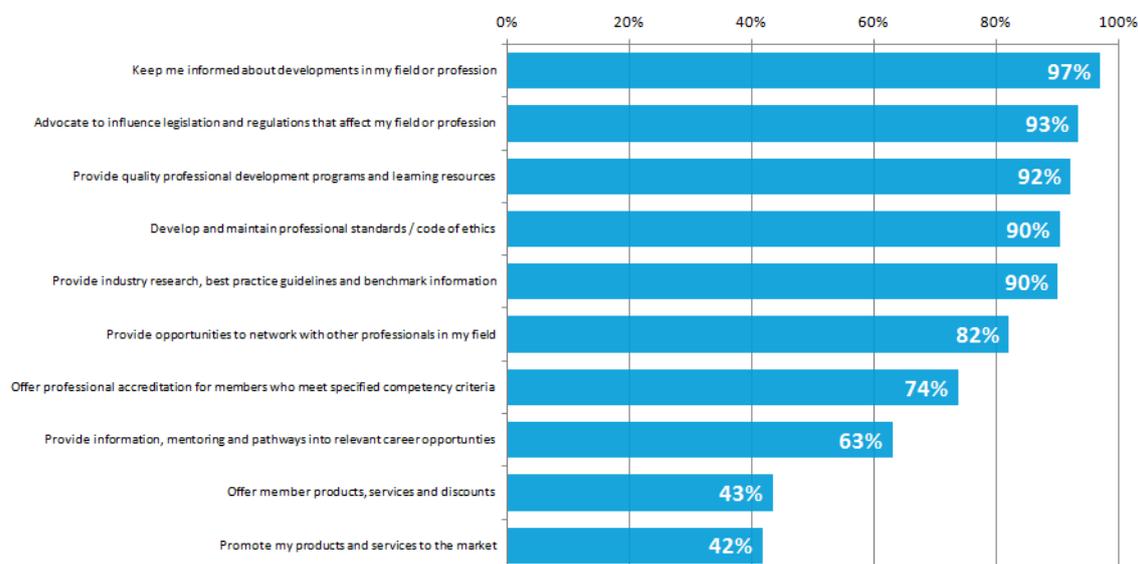
- a. Services that benefit the individual
- b. Services that benefit the field / profession

Respondents were asked to rate the importance of each function to them, on a five (5) point scale ranging from not at all important through to critical. Results are presented as a top two (2) box score, or the percentage of respondents who rated the function as important or critical.

So what is important to members? Are individual benefits of greater importance than the services that benefit the profession? It seems not! Of the four (4) most important services, there is an even split between “good for me” and “good for us” services.

How important are the following benefits and services provided by your association? (n=7726)

(Top 2 Box Rating)



Members want their own association to keep them informed about the latest developments in their field or profession, with 97% of respondents rating this function as important or critical. From members' perspectives, information provision is one of the most important functions of their association. How well associations do this is discussed in more detail in later sections.

Providing quality professional development is also important. A very large majority (92%) of respondents rate the provision of quality professional development programs and learning resources as important or critical benefits of their membership.

However, members are also likely to consider the advocacy efforts of their professional association as vital, with 93% of members indicating that this is an important or critical function of their own association. Members also rate the maintenance of professional standards (90%) as important for their profession.



Perhaps these findings signal that the functions of the association are actually more than the sum of the personal benefits, that the intangible benefits of the collective are also important. Or perhaps they do in fact point to member’s self-interest – that by wanting their association to protect and promote their field, members are signalling the importance they place on protecting their own investment in their education or professional development.

Provision of member products and services, promotional opportunities, career information and member promotion were the lowest ranked services in terms of their importance to members.

What do different groups think?

- The importance of being kept up to date is consistent across all age groups, career stages and locations.
- Members under 30 and entry level respondents are more likely to rate professional development resources as important to them than older members, with 96% and 97% respectively rating it as important to them. This compares to 92% of respondents overall.
- Networking is also more important to young and early career stage members, with 86% and 89% respectively rating it as important to them. This compares to 82% of all respondents.

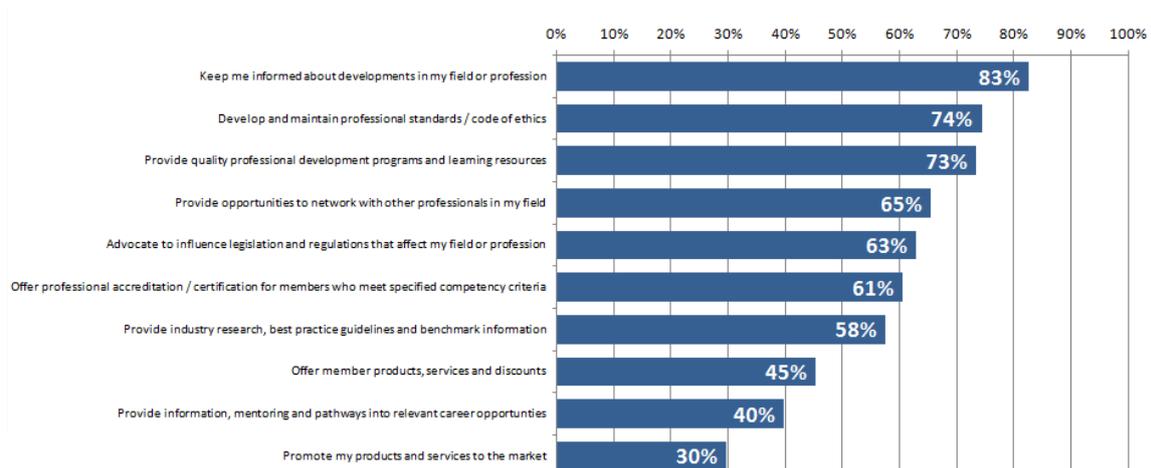
How do they think their association performs?

The next section listed the same questions as those respondents were asked rate in importance, but this time they were asked to rate how satisfied they were with their association’s performance in delivering those services. To enable comparability, respondents were again asked to rate each function to them on a five (5) point scale, but with the values corresponding to a range of ‘not at all satisfied’ through to ‘extremely satisfied’. Results are presented as a top two (2) box score, or the percentage of respondents who rated themselves as satisfied or extremely satisfied with their association’s performance.

So how are associations performing? Are members satisfied with their performance?

How satisfied are you that your association effectively provides the following benefits and services? (n=7726)

(Top 2 Box Rating)





When results are considered across all associations, members are most satisfied with their association's performance in keeping them up to date with developments in their field or profession, with 83% of respondents indicating that they were satisfied or extremely satisfied in this area.

Members are also moderately satisfied that their association does a good job at providing professional development programs and learning resources and of developing and maintaining professional standards, with 73% and 74% reporting being satisfied or extremely satisfied with these services respectively.

Of the other factors that are important to members, satisfaction with associations' advocacy efforts is not as high. Only 63% of respondents are satisfied or extremely satisfied with their association's advocacy efforts on behalf of their field or profession.

What do different groups think?

- Members across all age groups are equally satisfied with their association's performance in keeping them up to date with developments in their field or profession. Given the extremely high importance of this function, that's good news for associations!
- Entry level career stage respondents were more likely to report being satisfied with the professional development offerings (77%) and mentoring and pathways into career opportunities (45%) than more experienced members, with satisfaction dropping in line with seniority.
- Members aged over 60 were more satisfied with the networking opportunities offered by their professional association than younger age groups.
- While senior level respondents were the group most likely to be satisfied with their associations' advocacy efforts (65%), C-level or Board level respondents were the least satisfied with this (59%).

"Only 63% of respondents are satisfied or extremely satisfied with their association's advocacy efforts on behalf of their field or profession."



The performance gap

So let's look at the "Performance Gap". Are associations focusing their activities in the areas most important to members?

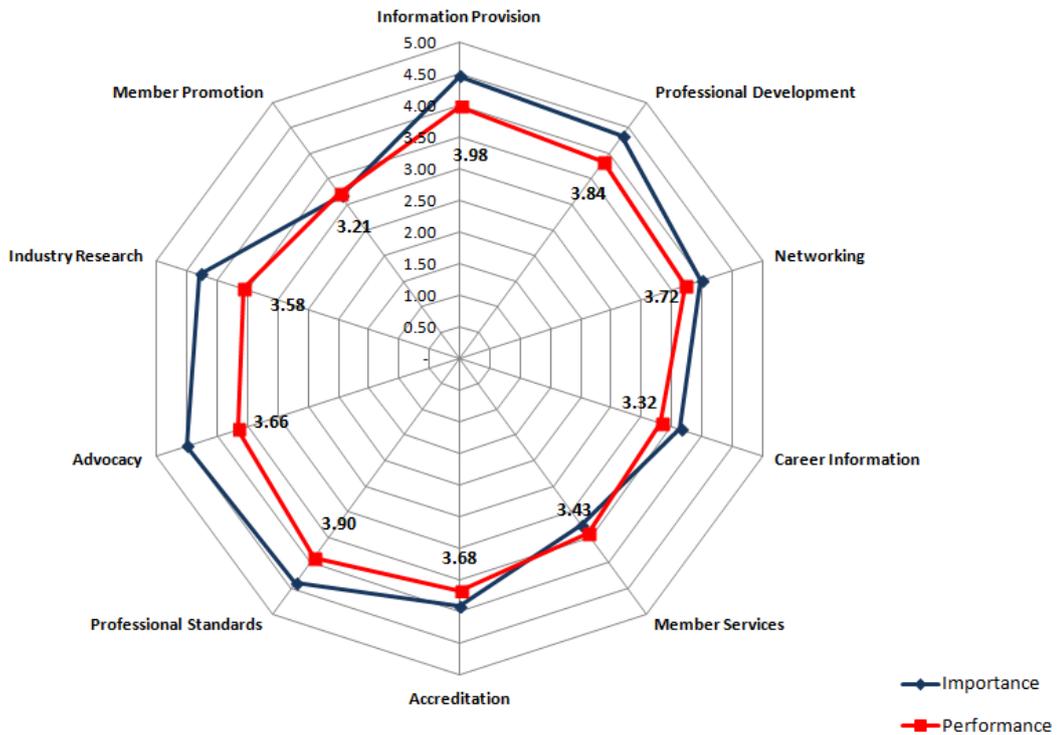
The first piece of good news is that none of the performance gaps are large.

There are no performance gaps greater than one across any of the dimensions tested. The largest negative performance gap (-0.84) is in the advocacy services provided by professional associations. 93% of respondents indicated that advocacy on behalf of the profession was important or critical to them, yet only 63% stated they were satisfied or extremely satisfied with their association's performance in this area.

Negative performance gaps are also evident in associations' delivery of information, professional development and professional standards; although with relatively high performance scores the negative gaps arise due to the high importance respondents attach to these services. As the gaps are not significant on their own, they do not indicate cause for alarm.

The one area in which there is a positive performance gap is in the provision of member products, services and discounts. This was not highly important to members, and indicates that associations may be allocating resources unnecessarily, and that that member funds may be spent more wisely in other areas.

Association Functions - Importance / Performance





Association Functions – Importance / Performance	Importance	Performance	Gap
Keep me informed about developments in my field or profession	4.45	3.98	-0.48
Provide quality professional development programs and learning resources	4.34	3.84	-0.50
Provide opportunities to network with other professionals in my field	3.98	3.72	-0.27
Provide information, mentoring and pathways into relevant career opportunities	3.64	3.32	-0.31
Offer member products, services and discounts	3.26	3.43	0.17
Offer professional accreditation / certification for members who meet specified competency criteria	3.93	3.68	-0.25
Develop and maintain professional standards / code of ethic	4.39	3.90	-0.49
Advocate to influence legislation and regulations that affect my field or profession	4.50	3.66	-0.84
Provide industry research, best practice guidelines and benchmark information	4.29	3.58	-0.72
Promote my products and services to the market	3.17	3.21	0.05
Sample size	7726	7726	

Respondent comments

How could the association improve the benefits and services provided?

Not surprisingly, many different topics came up with this qualitative question – from advocacy, professional standards and codes of conduct, through to the cost and quality of professional development and events.

These qualitative responses are of more benefit to each individual association, as members were thinking specifically about their own membership when they answered. This may explain the often conflicting views on the same subject! However, they are useful in the context that many of the same topics were mentioned across all association members.

Advocacy, Ethics and Standards

“The [Association Name] must take a role in promoting, participating and developing legislated ethical standards of practice.” (Member, 46-60)

“I really value the advocacy support and action that you take. I feel like you are keeping your eye on the big picture – while as a professional am more focussed on daily detail.” (Member, 30-45)

“In particular, I believe the single voice to advocate and influence legislation is a huge step forward for the profession.” (Member, over 60)

“Need to lobby government more and be more prominent in the media. I don’t feel that this happens enough compared to what it could.” (Member, 30-45)



Promotion to the General Public

*"It is not about promoting products and services but rather promoting the importance of [the profession] (collectively) in the community – I think we are slipping in trust and appreciation."
(Member, 46-60)*

"[Association Name] should be promoting to the public that their members are professional and bound by a code of ethics." (Member, over 60)

*"Needs to be much greater awareness of its existence amongst the general public"
(Member 30-45)*

There are varying opinions around the association being 'good for me' versus being 'good for us'.

"At different stages of my career some of the benefits have been more relevant than at other times. It has been up to me to make good use of them." (Member 46-60)

"I think people generally approach an investment (cost of membership) as a 'what can it do directly for me' return, as being of greater importance than the more altruistic returns of benefits to the profession and population. Thus it has to be eminently clear as to the direct/personal benefits of membership." (Member, 46-60)

"Focus on industry and profession and forget about membership benefits" (Member, 30-45)

There were also sometimes quite disparate views on the benefit of member products and / or discounts.

"The member benefits are generally more expensive than buying the product without using your benefit card and are a waste of the associations time and focus" (Member, 30-45)

*"I am very grateful for the member discounts I receive. It has saved me a lot of money becoming a member especially with my professional indemnity insurance as well as courses."
(Member, under 30)*



4. MEMBER SERVICES: Getting the mix right

This next section of the study was designed to help associations with their operational plans. To help associations decide which particular activities members most value and where they should direct their resources when deciding between particular types of events, professional development activities and learning resources.

To inform associations' specific product development and service delivery, members were asked to indicate how valuable the various types of information, professional development and learning resources provided are to them. Obviously individual associations provide events and resources for different audiences and in different formats. But there are similarities, and it is good for associations to be able to compare their services to those across the sector.

"Online education resources are highly valued by 81% of members."

Section summary

- Seminars and workshops that allow members to learn and hear ideas from others in their field and conferences that provide information about the industry are rated as valuable by an overwhelming majority of members (92% and 81% respectively).
- Online education resources are highly valued by 81% of members.
- 69% of members indicate that they are likely or highly likely to attend events offered by their association in the next 12 months
- While 73% of members rate their association's service delivery as good or excellent, only a small majority agree that the associations' events and resources are delivered in a suitable format, in sufficient quantity and with relevant information.
- Cost and location are often identified in qualitative feedback as the main barriers to use and participation in events and professional development activities. Webinars are often suggested as the ideal mechanism to improve access to all members.
- Young and less experienced members were more likely to agree that the information provided by their association was relevant to them.

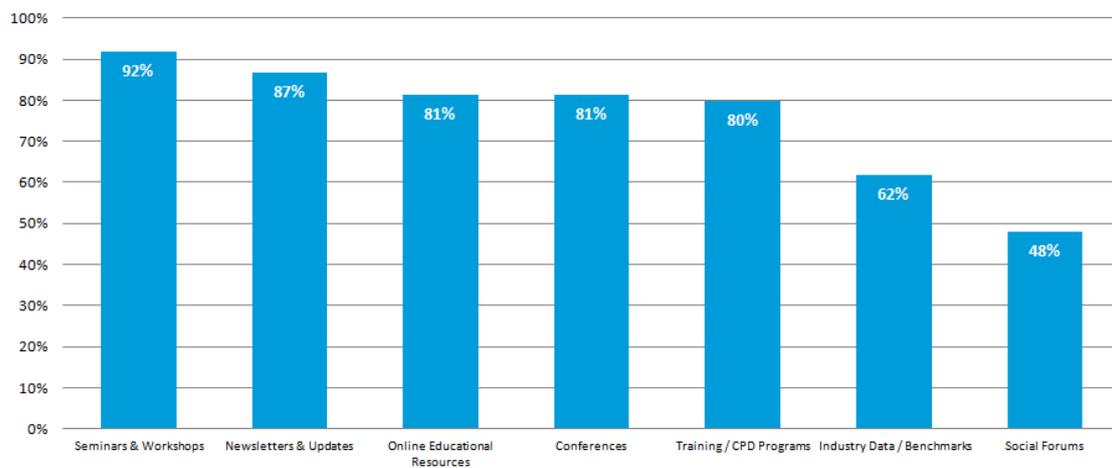


Service preferences

Respondents were asked to rate the value of the various types of individual member services to them on a five (5) point scale, with values corresponding to a range from 'of no value' through to 'very valuable'. Results are presented as a top two (2) box score, or the percentage of respondents who rated the particular services as valuable or very valuable.

How valuable are the following categories of events, professional development and / or learning resources to you? (n=7749)

(Top 2 Box Rating)



Members overwhelmingly indicated that seminars and workshops that allow them to learn and hear ideas from others in their field or profession deliver value, with 92% of respondents rating them as valuable or very valuable. 81% of respondents also value conferences that provide information about the latest industry research. This is perhaps indicative of the importance members place on quality professional development and learning resources.

While the popularity of seminars and conferences may reflect a desire from members for face to face contact with their association and others in their profession, online educational resources are also valued by 81% of respondents.

Unsurprisingly, regular newsletters and communications that provide updates on developments or stories of interest to the industry are important to members, with 87% rating them as valuable or very valuable.

Purely social forums that enable members to network with others in the industry are less important, with only 48% rating these types of events as valuable. Members probably have their own social networks and don't need their professional association to provide this for them. Perhaps members also think that seminars and conferences meet two needs at once, both providing information and offering a chance to network with their peers.

"Learning and professional development services are more highly valued by young and less experienced members."



What do different groups think?

- There was a tendency for younger and less experienced members in the study to more highly value all of the learning and professional development services provided by associations.
- Newsletters which were equally valuable to all membership groups.
- Young and early career stage members were much more likely to indicate a preference for online educational resources. The value of online resources steadily decreases with age and seniority from 88% of members under 30 to 66% of those over 60, and from 87% of early career stage members down to 69% of C level and Board executives.
- Training and CPD programs become less popular as members' age and gain more experience in their field.

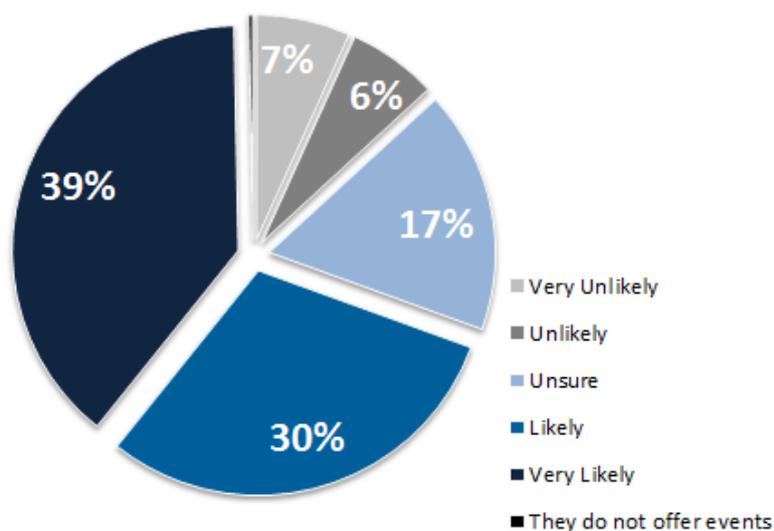
Attendance ... events are important, but will members come?

After rating the value of the member events and services, respondents were then asked whether they will actually use them. Will they attend any of the events offered by their association in the next 12 months?

Associations will be pleased to learn that 69% of respondents indicated that they were either likely or extremely likely to attend.

Only 13% thought they were unlikely to attend.

How likely are you to attend events offered by your association in the next 12 months? (n=7749)





What do different groups think?

- While young and entry level members were slightly more likely to attend events there was very little difference in propensity to attend events based on a members' age or career stage.
- More likely to affect the propensity to attend were location, the type of organisation an individual works for and whether or not they pay their own membership fees.
- Unsurprisingly, members living outside of capital cities are less likely to believe they will attend any of the events offered over the coming 12 months than city dwellers (37% compared to 41% respectively). This is most likely reflective of ability to attend, is often mentioned in free text comments and is a common theme among much of our membership research for individual associations.
- Respondents working in the private sector are more likely than those in other sectors to attend events. This may be a budgetary issue - private sector employers are more likely to pay for employees' attendance at events, particularly applicable when event fee charges are high. Greater competition and pressure to stay at the forefront of their field in a corporate environment may also encourage individuals to ensure they are constantly up to date with industry developments.

The impact of fees on event attendance

Members who pay their own membership fees are more likely to indicate that they will attend events this year, 40% compared to 36% of those whose employers pay their fees and 28% of whom do not have to pay a fee to belong.

Without understanding whether, and to what extent, associations charge additional fees for attending conferences and events, it is difficult to ascertain the reasons behind this. We would surmise that if fees for events are in some way subsidised by the annual association membership fee, individuals who have paid their own fee would feel a greater need to justify the expense by utilising their membership. Memberships paid for by an employer, or for which there is no fee, do not carry the same level of personal attachment.



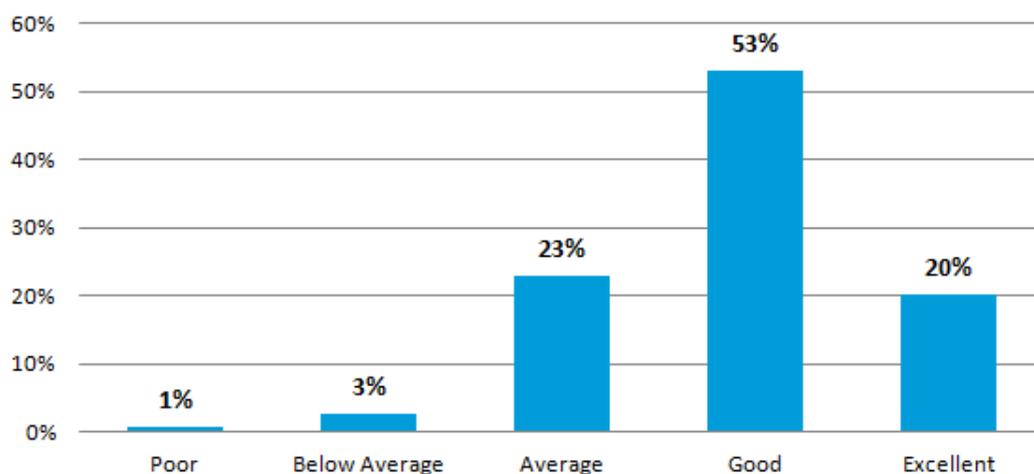
Service quality

Members have indicated that seminars, events and professional development resources are important to them. A majority indicate that they are likely to attend. However, members are time poor. With so many events, seminars, webinars and networking functions to choose from, associations need to understand how the services they offer are perceived by members, and whether quality factors may be affecting their decision to utilise the resources on offer.

To find out, the [Associations Matter: 2013 State of the Sector Study](#) asked respondents to rate the quality of their associations events and services. Firstly, respondents were simply asked to rate the quality as either poor, below average, average, good or excellent.

While only 20% of respondents rated their association's events and services as excellent, a majority (53%) rated them as good. However, twenty seven percent (27%) rated events and services as average or below. There are also some noteworthy differences in the responses of different sub-categories of members.

Overall, how would you rate the quality of events and services provided by your association? (n=7749)



What do different groups think?

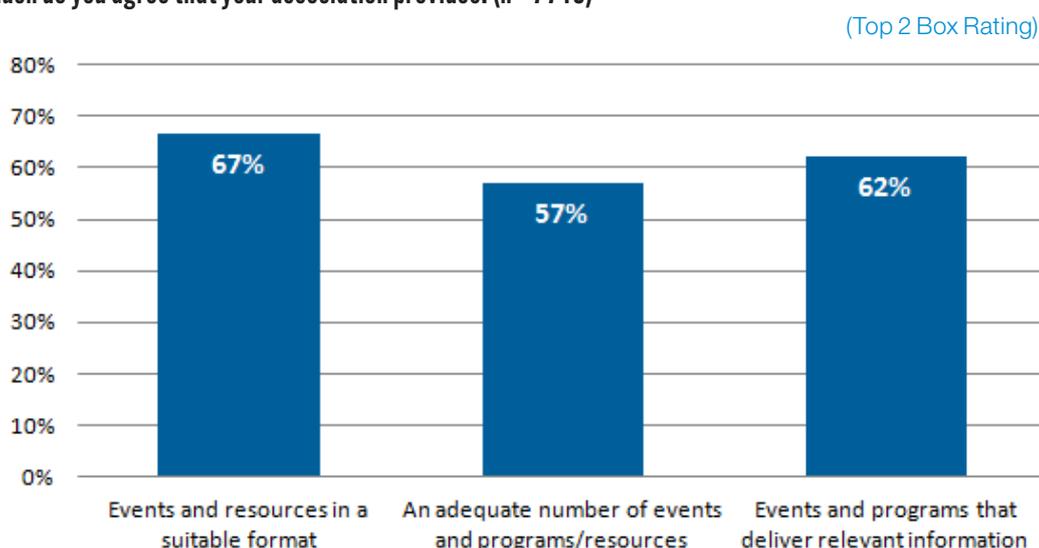
- Analysis by career stage indicates that more experienced professionals are less impressed – 33% of C-level or Board executives think that the events and resources provided by their association are average or below average. Less experienced professionals are more likely to rate their associations services highly.
- Members who reside in capital cities, in NSW and who work in the private sector were least satisfied with the quality of events and services than other members.
- Individuals who pay their own membership fee, as opposed to having it paid by their employer, were also less satisfied with the quality of services.



Issues of quality ... format, quantity and relevance

To validate and add depth to the overall events and resources rating, respondents were then asked to rate, using three (3) agree/disagree statements, the major dimensions of the member services provided by their association – format, quantity and content. The results are presented as a top two (2) box score, or the percentage of respondents who indicated that they agree or strongly agree with the quality statement offered.

How much do you agree that your association provides: (n=7749)



Overall, a small majority of respondents agree or strongly agree that their association's events and resources are delivered in a suitable format, in sufficient quantity and with information that is relevant. However, associations should bear in mind there are still large numbers of members who are neutral or more inclined to disagree that events and resources are provided in a way that meets the needs of members. We would suggest that these questions may vary significantly across associations, and individual associations should seek to determine their own member's opinions to gain a clearer picture for their own offerings.

The lack of a clear consensus about the relevance of information provided at association events is perhaps the most concerning aspect of the three dimensions of service quality. While a majority (62%) agree that the information presented is relevant, this should be reviewed in light of the opinions of different groups.

What do different groups think?

- Members across all segments were likely to agree that an adequate number of events and programs are offered by their association. Interestingly, members who live in NSW were least satisfied with the quantity of events offered – despite being the group least likely to rate the services highly!
- More experienced members are least likely to be satisfied with the format of the events and resources provided by their association – only 56% of C-level or Board executives agree that the format of events and services meet their needs, compared to 67% overall.



- Less experienced members were more likely to agree that information presented was relevant to them than more experienced practitioners (69% entry level versus 53% C-level). This may indicate that associations are directing their resources to provide services in areas of greatest need with this group more likely to indicate that professional development, learning resources and events are important to them.
- Members who think the fees charged are too high are significantly less likely to agree that events are offered in sufficient quantity (46% compared to 57% overall)
- Members who are satisfied with the level of their membership fees are the most satisfied that events are offered in a suitable format, are sufficient in number and provide relevant information.

Respondent comments

How can associations improve events & resources?

There were frequent calls for better use of technology for professional development, and for events to be staged outside capital cities.

"Recordings (podcasts) would be wonderful!" (Member, under 30)

"More web based and easily accessible. As I am rural, with limited PD budget it is difficult to access workshops/conferences." (Member, 30-45)

"Access to the conferences and talks etc. for those that can't physically attend e.g. have it via YouTube or videoconferencing etc" (Member, 46-60)

"Remote and rural members have difficulty accessing professional development to costly events, particularly considering transport and accommodation costs." (Member, 30-45)

"Webinars could improve access to the widely dispersed membership." (Member, 46-60)

Members across all associations, regardless of location, were concerned about the costs of events and professional development.

"The events are currently rather expensive; if there was a lower cost alternative then they might be able to entice some new members." (Member, under 30)

"I think the main thing is to keep the cost of courses reasonable and possibly run some that are only half a day so the time away is not always so hard to arrange." (Member, over 60)

"I think events, professional development and/or educational resources need to be appropriate, flexible, timely and relevant and more importantly affordable. Too often events and PD that are run are quite expensive for members, especially members who work for not for profit organisations." (Member, 46-60)

"Web based service delivery overcomes issues of cost, distance and timing."



5. COMMUNICATION:

A new way to talk to members

For associations to remain relevant, an effective communication strategy is fundamental. Members identify keeping up with information and developments in their profession as one of their main challenges. They rate it as one of the most important functions of professional associations. It is one of the main reasons for joining their association. And while information provision is rated as the area in which associations are most effective, the ease with which individuals can source and access information themselves is one of the most often mentioned reasons given by respondents who think there will be a decreasing need for associations over the next five years.

Rather than seeing the proliferation and ease of information access as a threat to their relevance, associations need to view it as an opportunity. Members need help synthesising the massive amount of information available to them, working out what's important and deciding where they need to focus their attention. They need information to be provided when and in a form that suits them. They need it to be broken down into manageable chunks. They need to know it is up to date.

To rise to this opportunity, associations need to work out how to best communicate with members. This section looks at how members want to receive information, and what resources they use themselves when seeking information. We also asked members to rate the overall quality of their associations' communication and whether the information provided was relevant, timely and in a suitable format

"Members need help synthesising the massive amount of information available to them."

Section summary

- 91% members like to receive information and news from their association via email. This preference is consistent across all membership segments.
- Association websites and industry magazines and journals are included amongst the preferred sources of information by 57% and 46% of members respectively.
- Online media and mobile apps are growing in popularity with younger members - 36% of members under 30 and 27% of members aged 30-45 indicated a preference for these communication methods. Mobile apps were suggested by many members in qualitative comments.
- 88% of members use Google to search for information about their field or profession. Webinars and podcasts are also a popular means of finding information
- While 52% of members rate their associations overall communication as good, only 13% rated it as excellent and 35% think it is average or below.
- A small majority of respondents agreed that their association provides information that is relevant, in a suitable format and timely. There was little difference in opinion across age or career stage in respect to overall quality of communication.
- There were many qualitative comments suggesting that "one size does not fit all" and that associations need to tailor their message to suit different member types.

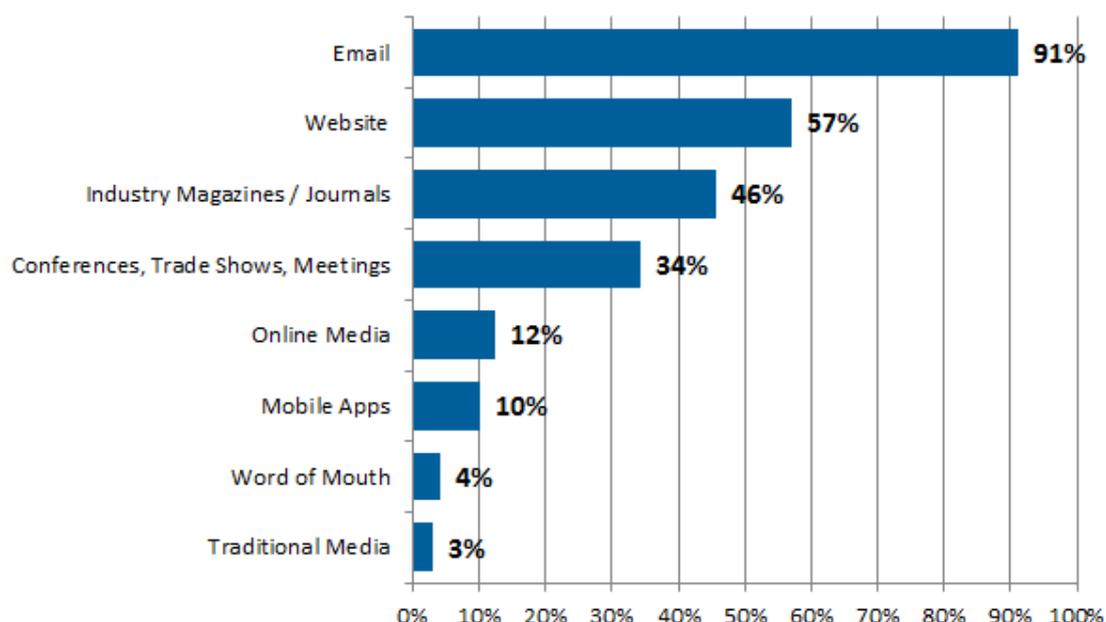


How do members like to receive information from their association?

To cut through the hype and conjecture about the best communication methods and techniques, and to help associations navigate the changing landscape of marketing and communications, the [Associations Matter: 2013 State of the Sector Study](#) simply asked members how they would like to receive information from their association.

Respondents were presented with a list of eight (8) communication methods and asked to select their three (3) most preferred methods. In presenting the results, responses have been calculated to show the percentage of respondents who selected each method.

How do you like to receive information from your association? (base n=7749 n=19976)



Despite the proliferation of social and online media, members' communication preferences remain relatively stable. As in most of the research we conduct for individual associations, members overwhelmingly like to receive information from their association via email. This is consistent in the [Associations Matter: 2013 State of the Sector Study](#) where 91% of members selected email within their top three preferences.

While not suggesting that this should provide license for associations to be complacent, it at least provides one point of stability in such a rapidly changing landscape! However, associations should also challenge themselves to ensure the quality of their email newsletters and communications is high. Tailoring the content of the email newsletters according to the member's subscription type, location or technical needs is one way in which email communications can be kept relevant. Allowing members to select the frequency and content they wish to receive is another.

A small majority of members are also happy to look up information on the associations' website, with 57% of members indicating a preference for information to be made available via the association website. While traditional media (newspapers, radio) were of little interest to members, industry



magazines, conferences and trades shows are still popular with members of professional associations.

Online media and mobile apps are growing in popularity, although still feature amongst member preferences to a lesser extent than traditional channels of communication.

What do different groups think?

- An overwhelming majority of respondents in all segments included a preference for email communication.
- Younger members were less likely to indicate a preference for looking up their associations' website with less than half of all respondents under 30 selecting this among their preferences. This compares to 60% of respondents aged over 45. Younger members were also significantly less likely to choose to receive information through industry magazines and journals.
- Not surprisingly, younger members are much more likely to indicate a preference for receiving information via online media and mobile apps. Twenty percent (20%) of members under 30 would like to communicate via online media, a preference that progressively drops down to 7% of members over 60. The percentage of respondents indicating a preference for mobile apps also steadily reduces with age, from 16% of members' under 30 to 5% of members over 60.

Communication Preferences	2013 Benchmark	Under 30	30-45	45-60	Over 60
Email	91%	91%	92%	91%	88%
Website	57%	49%	55%	60%	60%
Industry Magazines / Journals	46%	43%	46%	45%	50%
Conferences, Trade Shows, Meetings	34%	28%	28%	39%	44%
Online Media	12%	20%	15%	10%	7%
Mobile Apps	10%	16%	12%	8%	5%
Word of Mouth	4%	6%	4%	4%	5%
Traditional Media	3%	4%	3%	2%	4%
Sample Size	7749	1015	2663	3125	945
Total Mentions	19976	2622	6757	8105	2492

"An overwhelming majority of respondents in all segments included a preference for email communication."

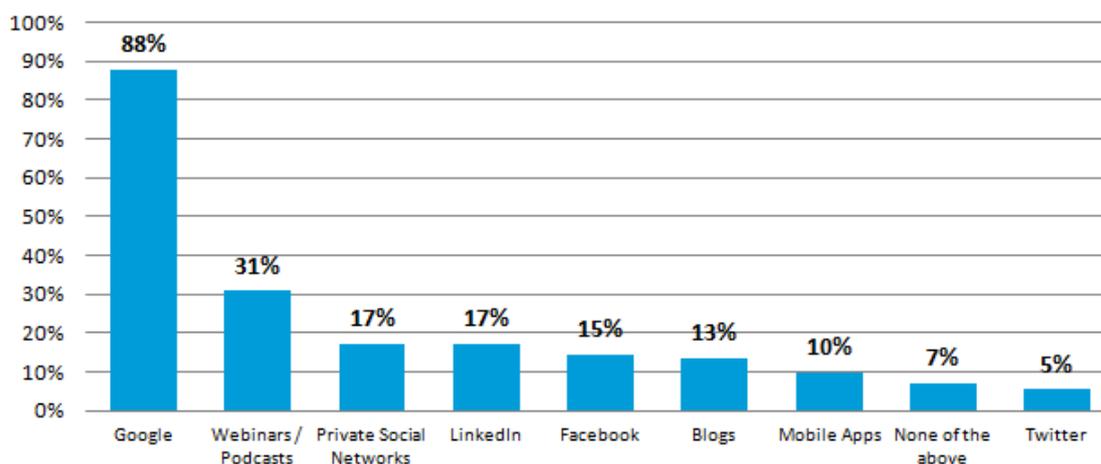


Online media

So an increasing number of younger members want associations to use online media to keep them up to date with industry news, information and developments, and some older members are also adapting to new technologies. That's good information, but probably what we already knew. So where should associations start? Which online channels should associations utilise? Where do members go for their information?

To provide guidance to associations, respondents were asked to select all of the online media that they actively utilise when seeking information about their field or profession. In presenting the results, responses have been calculated to show the percentage of respondents who selected each item.

Which of the following do you **ACTIVELY USE** when seeking information about your field or profession? (base n=7749, n=15703)



Unsurprisingly, Google is the preferred method of searching for information. Eighty-eight percent (88%) of respondents indicated that they actively use Google to find information about their field or profession. While selected by a lower number of respondents, webinars and podcasts were the next most popular means of sourcing information and perhaps represent an area of growing interest. Private social networks, LinkedIn and Facebook were the next most utilised online media channels.

This indicates that while online media channels offer a growing opportunity as a means for associations to fulfil members' expectation that they will provide information and facilitate professional development and networking opportunities, to meet the varied needs of their members associations need to actively engage in all of these online mediums in order to accommodate different preferences of different groups of members.



What do different groups think?

- All age groups indicate using Google to the same extent.
- There was little difference in the use of webinars and podcasts by different age groups or locations.
- While there is a fairly consistent usage of private social networks across the age groups, young members are much more likely to utilise Facebook and older members are more likely to use LinkedIn.
- Mobile apps are more popular with younger member, usage decreases progressively with age.
- Twitter is not selected by many members across any age group.

Online Media Use	2013 Benchmark	Under 30	30-45	45-60	Over 60
Google	88%	89%	89%	88%	84%
Webinars / Podcasts	31%	27%	32%	33%	25%
Private Social Networks	17%	17%	15%	17%	22%
LinkedIn	17%	10%	15%	20%	21%
Facebook	15%	28%	16%	11%	8%
Blogs	13%	16%	14%	13%	11%
Mobile Apps	10%	12%	10%	9%	7%
None of the above	7%	5%	6%	7%	12%
Twitter	5%	6%	7%	5%	3%
Sample size	7749	1015	2663	3125	945
Total Mentions	15707	2119	5442	6328	1818

"Associations need to actively engage in all of these online mediums to accommodate the different preferences of members."

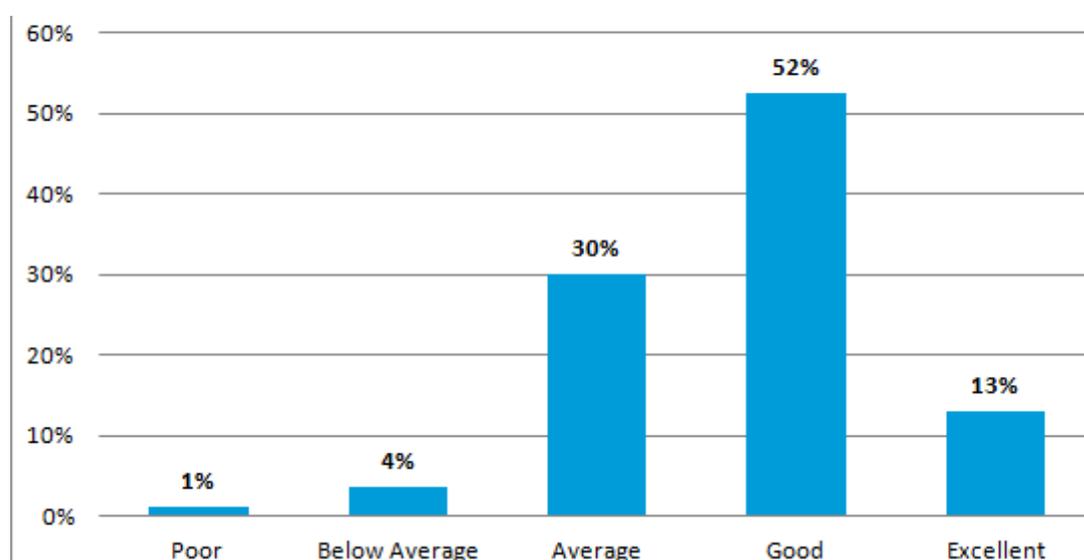


Communication quality

Professionals now have an extraordinary array of ways in which they can keep up to date with information, connect with others in their industry and share ideas. And we now know how members want to their associations to provide them with information and keep them up to date. So how is the associations sector doing? Are they providing information in way that satisfies and engages their members?

To find out, the [Associations Matter: 2013 State of the Sector Study](#) asked respondents to rate the quality of their associations communications. Firstly, respondents were simply asked to rate the quality as either poor below average, average, good or excellent.

Overall, how would you rate your association's communications? (n=7749)



In good news for associations a majority (65%) of respondents rated their communications as good or excellent – although significantly more good than excellent. However, thirty-five percent (35%) still rated their associations communications as average or below. We consider this a relatively large number, and maybe even be a wake up call for associations to improve the ways in which they provide information and communicate with their members.

What do different groups think?

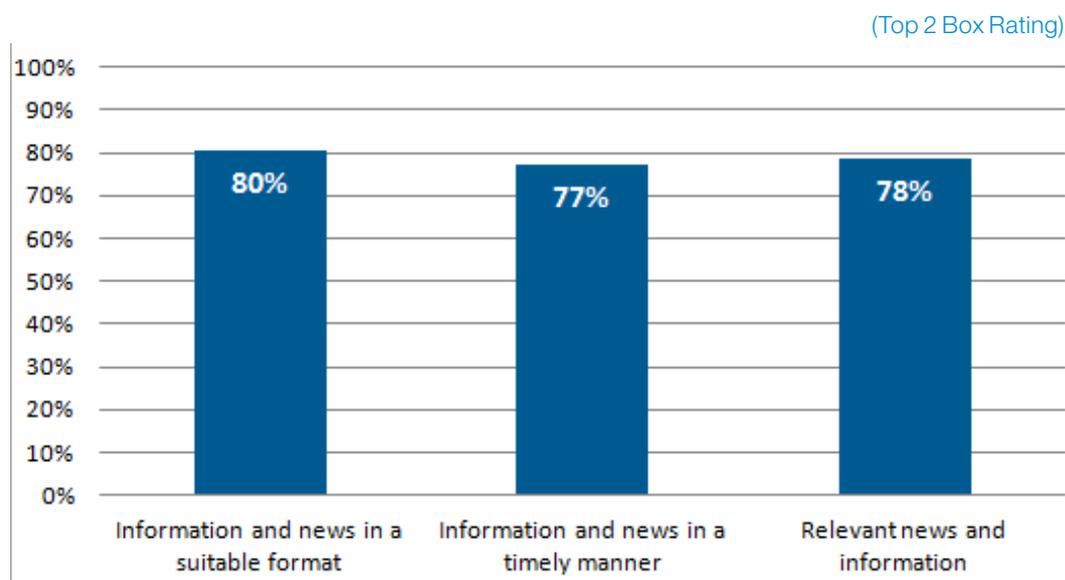
- There was no discernible difference in the opinions of respondents about the quality of their association's communications across any of the membership segments, including age, career stage, employer type or location.



Issues of quality ... format, timeliness and relevance

To validate and add depth to the overall communication rating, respondents were then asked to rate, using three (3) agree/disagree statements, the specific aspects of the communications provided by their association – format, timeliness and relevance. The results are presented as a top two (2) box score, or the percentage of respondents who indicated that they agree or strongly agree with the statement.

How much do you agree that your association provides: (n: 7749)



Overall, the results are positive. A majority of respondents agreed or strongly agreed that their association provides information and news that is in a suitable format, is timely and relevant. This validates the overall findings that members think their association’s communication is “good”.

Associations appear to be meeting the needs of the majority of members in respect to the way in which they provide information - 80% of respondents indicate that they receive information in a suitable format. This may reflect that a large majority of members want to communicate via email, and that email newsletters are an established practice of the majority of associations.

Timeliness and relevance also go to the heart of ensuring that associations “keep members informed about the latest developments in their field or profession”. That a majority of respondents agree with these statements is also positive.

The qualitative feedback provides some guidance as to why a third of respondents rated their association’s communications as average. Many members indicated that the quality of their association’s website was poor, email newsletters were of inconsistent quality and that they would like to see their association develop an app or more effectively utilise online group discussion forums. Perhaps while the content, timeliness and format of existing communications are good, the overall quality is not as high as it could be. Member comments indicate that associations should maintain their current focus on form, timeliness and relevance but to also look to providing a richer, tailored and more integrated communication with members.



What do different groups think?

- Young and entry level respondents were significantly more satisfied with all aspects of their association's communications, including format, timeliness and relevance, than older and more experienced members.
- Respondents based outside of the capital cities are more likely than capital city dwellers to rate the format, timeliness and relevance of their associations communications highly.

"Digital communications provide a growing opportunity for associations to keep members up to date about developments in the industry."



Respondent comments

How can associations improve their communications?

When it came to ideas about improving communication members were very vocal! They also had very diverse opinions, depending on the Association they were responding about, their age and their location.

Overall, there were many references to mobile apps, webinars and social media in general – and not just from younger members:

“A mobile app would be helpful, as email notifications just get lost / ignored amongst all my other notifications/emails.” (Member, 30-45)

“Improve access through social networking sites, e.g. Linked In” (Member, 46-60)

“More active on Twitter and Facebook to draw people to the website. Make the website easier to find resources on.” (Member, 30-45)

“Webinars on relevant topics” (Member, 46-60)

Many members also like the idea of being provided with news and information in the format that they want.

“Understand better the needs of the varying groups who are members. One size does not fit all.” (Member, over 60)

“Ensure you have presence for all type of members - the younger members and more traditional members. Do not focus on one type of communication, but keep it consistent and regular - we need to be on social networking sites, but also need to have traditional media outlets.” (Member, 30-45)

“Spread of members in age and technology knowledge means different things to each person so various methods should be used.” (Member, 46-60)

Respondents also frequently mentioned the “information overload” that they are faced with these days, and how difficult it is to keep pace with all of the information available. They want their association to provide them with relevant information.

“News and information are now expected to be immediate. We are all connected to the world 24/7. Perhaps [Association Name] needs to devote some resources to ensuring it distributes info more rapidly, whilst striking a balance to ensure the info so distributed remains ‘accurate and professional’.” (Member, over 60)

“More dot points and succinct information and less lengthy emails to read - it needs to be more user friendly in a very busy profession” (Member, under 30)

“Increasing the diversity of media used to connect with members; continuing and strengthening the role of curating the volume of information/resources available (give us the highlights and then the links to follow up if we’re interested).” (Member, 30-45)



6. ENGAGEMENT & SATISFACTION: Is there a difference?

Understanding the difference between engagement and satisfaction is important to providing a membership experience that is tailored to the wants of different membership groups.

Engagement is vital to attract and retain individuals who value membership of their association for the sense of belonging, community and shared experiences that the professional association facilitates. It helps to create an association that is respected, and of which members are proud to belong. However, for members who wish simply to access individual services, such as information and professional development, ensuring they are satisfied with the quality and value provided is just as important.

The challenge for associations is to work out which category members fall into!

To understand the levels of engagement and satisfaction within the professional association sector in Australasia this section asked members about various aspects of their membership. To test engagement, statements around pride, respect, recognition, ease of interaction, feeling valued and association's understanding of member needs were asked. We also asked members how important belonging was to successful practice in their profession, and how satisfied they were with their membership.

"Cultivating engagement is vital to retain individuals who value membership of their association for the sense of belonging, community and shared experience it facilitates."

Section summary

- Overall, association members are relatively engaged. 71% agree that their association is respected in the industry and 76% of respondents are proud to be a member of their association.
- The behaviours that ought to be modelled by associations in order to develop the engagement of their members are less positive. Only 58% of members agree that they are treated as a valued member of their association, 56% believe that management understands the needs of members and 57% indicate that the association seeks to involve them.
- For 58% of respondents, membership of their professional association is seen as important or critical to their career. Nearly a third of members indicated that membership did not make a difference to successful practice in their field, while 14% indicated it was unimportant to them.
- Membership is more important to younger and less experienced members.
- Overall, Australasian members are relatively satisfied with their membership. While only 11% report being extremely satisfied, a majority (62%) are satisfied. A further 21% have no strong opinions either way and only 6% are dissatisfied.
- When viewed by age level and career stage, both engagement and satisfaction levels follow the pattern observed in most studies we undertake – that young (and most likely fairly new) members are relatively satisfied, but that satisfaction levels then drop before gradually increasing again with members age and experience. Older members are the most engaged, and satisfied, group.



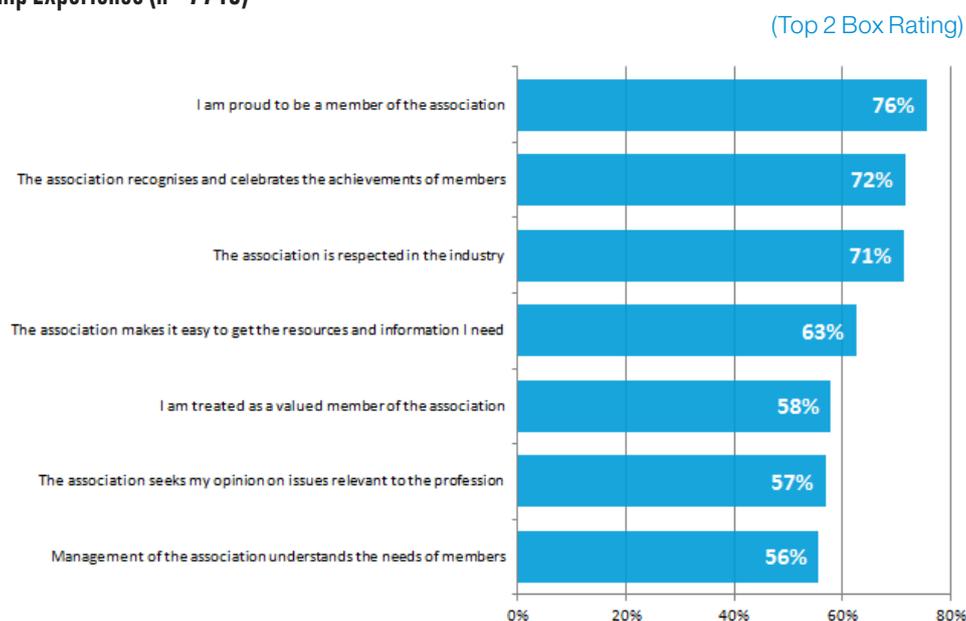
Are members engaged with their association?

To try to understand how “engaged” members are with their association, a section was included in the study which asked a series of questions that focused on individuals’ thoughts about the more intangible aspects of their membership experience. Are they made to feel part of the association? Does the association make it easy to participate? Do they feel part of a respected group of which they can be proud?

While by no means an exhaustive list, and not claiming to offer a firm engagement definition or score (which by its very nature is almost impossible to define and measure), the questions asked simply sought to provide a sense of what members think about several factors that may influence how belonging to their professional association makes them feel and therefore how “engaged” they are with their association, regardless of whether they actively participate or not.

Respondents were asked to indicate how much they agreed or disagreed with the statements presented to them on a five (5) point scale, ranging from strong disagreement through to strong agreement. Results are presented as a top 2 box score, or the percentage of members who either agreed or strongly agreed with the statement.

Membership Experience (n=7749)



The most important finding in relation to members’ engagement is that 76% of respondents are proud to be a member of their association. And 71% agree that their association is respected in the industry. These outcomes, or indicators, of engagement are fairly positive.

Only 58% of members agree that they are treated as a valued member of their association, only 56% believe that management understands the needs of members and only 57% indicate that the association seeks to involve them. These are behaviours that associations should be demonstrating if they expect an engaged membership base.

To provide another way to compare feedback across groups, an overall engagement rating has been calculated for each of the different membership segments analysed by the [Associations Matter: 2013](#)



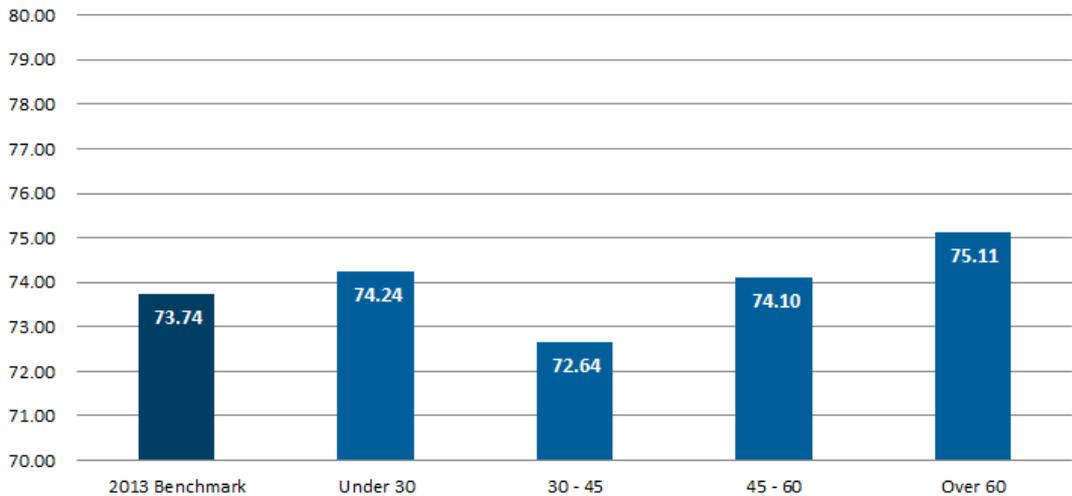
State of the Sector Study. The rating has been calculated for each group by averaging responses across all survey items pertaining to members experience and converting the result into a score out of 100.

The overall engagement rating for members across the entire study is 73.74, which would indicate a moderately engaged membership; however these results vary across different associations.

What do different groups think?

- When viewed by age and career stage, engagement levels follow the pattern observed in most studies we undertake – that young (and most likely fairly new) members are relatively engaged with their membership, but that engagement levels then drop for a period before gradually increasing again with members age and experience.
- Respondents who reside outside of capital cities have a higher engagement score than capital city based members (74.50 and 73.20 respectively), despite often indicating in free text feedback that they have limited opportunity to access association events and services and therefore have reduced involvement in association activities.

Member Engagement (n=7749)



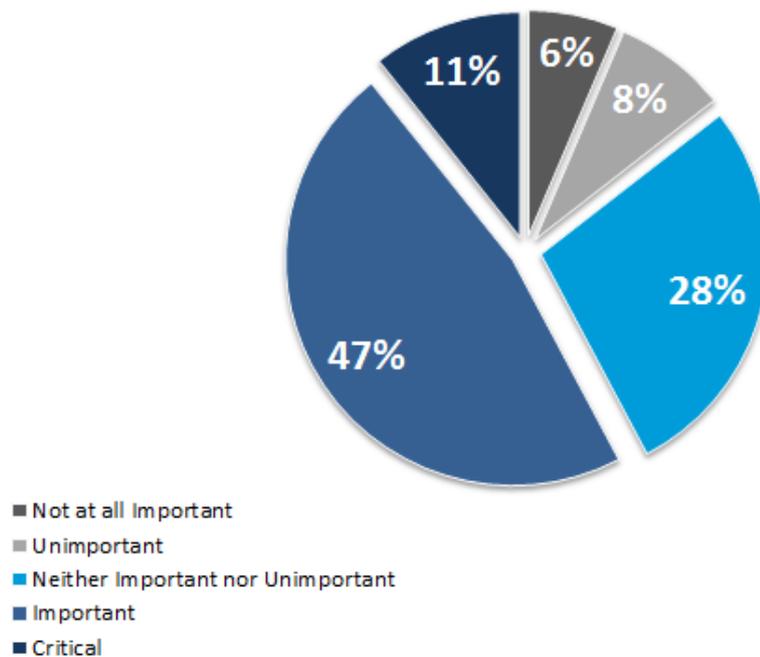
How important is membership?

To look at engagement from another perspective, the survey asked respondents to identify whether they thought that association membership was important to successful practice in their field or profession. In other words, are their career prospects, knowledge or ability to operate as a credible, profitable practitioner enhanced by their membership of the sponsoring association. These are factors likely to be indicative of the fact that their association is a respected presence in their field or profession – a major driver of engagement and a source of membership pride.



For 58% of respondents, membership of their professional association is seen as important or critical to their career. Just over a quarter of members indicated that membership did not make a difference to successful practice in their field, while 14% indicated it was not important to them.

To be successful in your field, how important is membership of the association? (n=7749)



What do different groups think?

- Membership is seen as particularly important for less experienced members, with 66% of entry level respondents indicating that their membership was important to them compared to 56% of mid-career respondents, 58% of senior respondents and 50% of C-level or board executives.

Is satisfaction a different concept?

A different concept from engagement, satisfaction seeks to measure whether members are happy with their membership. It doesn't seek to understand if members feel a sense of involvement, community or belonging to their association – the indicators of engagement. It is a more simple measure. As a result of this, some might argue it is a lesser concept.

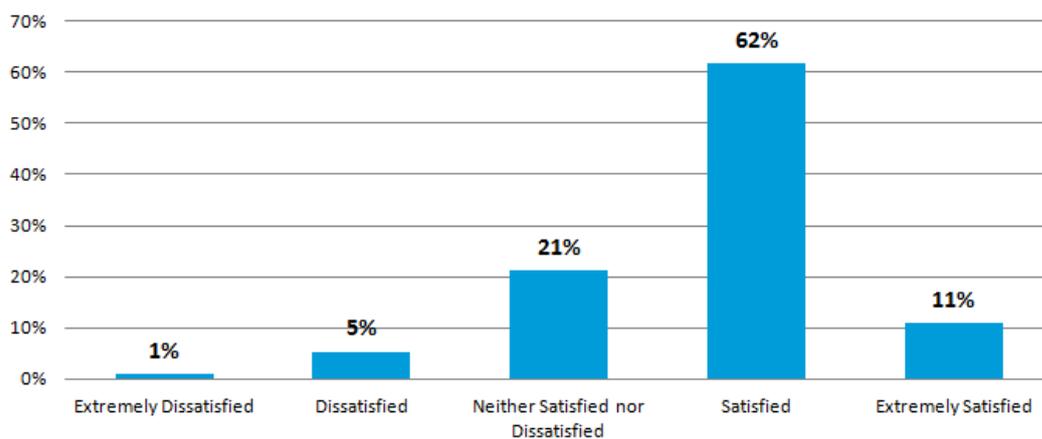
Despite this, we think that there are some respondents for whom membership of their association is simply a service contract. They are happy to pay their fees, and expect to receive certain products, benefits or services in return. They do not seek, nor feel the need, to be more involved. They are paying for a service, so it is important to understand if they are "satisfied" with the service their association provides them. It aims to provide an indicative, summary measure of members overall satisfaction with the specific aspects of their associations strategic functions, events and resources and communications.



Are members satisfied with their membership?

In the [Associations Matter: 2013 State of the Sector Study](#), respondents were asked to rate their overall satisfaction with membership of their association on a five (5) point scale, from 'extremely dissatisfied' to 'extremely satisfied'.

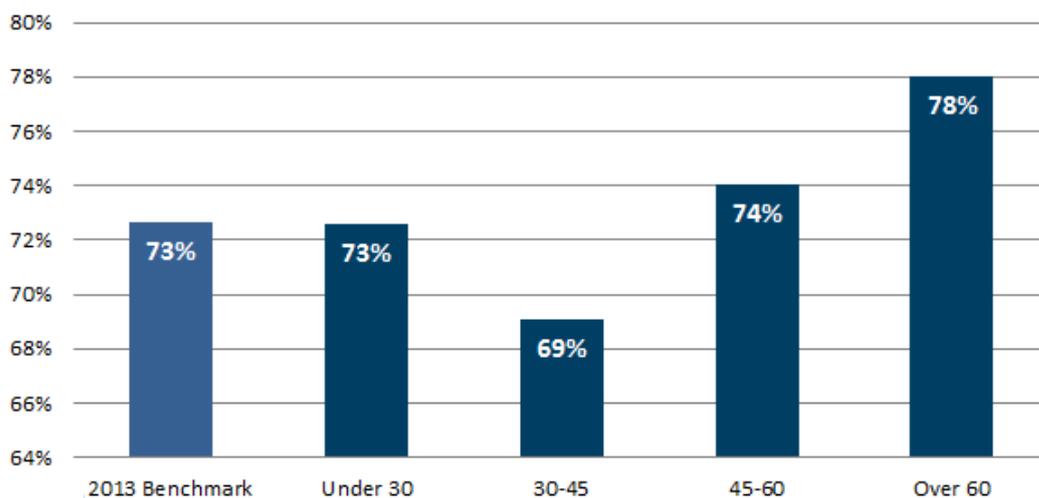
Overall, please rate your level of satisfaction with your membership of your association (n=7749)



What do different groups think?

- Like engagement, when viewed by age and career stage, reported satisfaction follows the pattern observed in most studies we undertake – that young (and most likely fairly new) members are relatively satisfied with their membership, but that reported satisfaction falls before gradually increasing again with members age and experience.
- An interesting (although perhaps expected) finding is that members who pay their own fees are significantly less satisfied than members who have their fees paid by their employer, or who do not have to pay a fee to belong to the association (at 71%, 76% and 78% respectively).
- Members living outside of capital cities are more likely to report being satisfied or extremely satisfied than their counterparts living in the capital cities.

Satisfaction (n=7749)





7. RENEWAL & RECOMMENDATION:

The keys to survival

Membership growth depends on retaining existing members and attracting new members.

Of these two, retaining members is much more cost effective than recruiting new members. Retention appears to be ok, although these figures will differ across each individual association, and may need to be tested further.

Educational institutions are the logical place for recruitment; however, part of the strategy must also focus on the very valuable word of mouth referrals. Associations appear to be doing this quite well – nearly a quarter of respondents heard about their association through friends, colleagues or their employer, and the overall Net Promoter Score (NPS) of 2 indicates that those members providing positive word of mouth referrals exceeds those who would not recommend their association. These scores will also be different for each individual association.

So how likely are members to renew their membership? What factors are likely to prompt them to drop their subscription? Is it a question of value, or service? What impact do fees have on the likelihood to renew?

To find out the answers to these questions, this section looks at who pays the membership fees, how they rate the cost of membership, whether they intended to renew their membership and how likely members are to recommend your association

Section summary

- A majority of members (70%) pay their own membership fees. Mid or senior level employees or C-level executives are more likely to have their membership paid by their employer.
- 52% believe the cost of membership is about right, with 34% rating it as too high. Only 1% thought fees were too low and 11% did not have an opinion.
- Overwhelmingly it appears members are likely to renew their membership, with 91% indicating intent to renew.
- The cost of membership and perceived lack of value are the main reasons members indicate they may not renew
- The overall Net Promoter Score is 2. This indicates that there are more members likely to recommend their association to others than to provide negative word of mouth.
- Net Promoter Scores vary significantly by age, career stage, organisation type and location. Scores will also vary widely for each individual association.

"Membership growth depends on retaining existing members and attracting new members.

Of these two, retaining members is much more cost effective than recruiting new members."



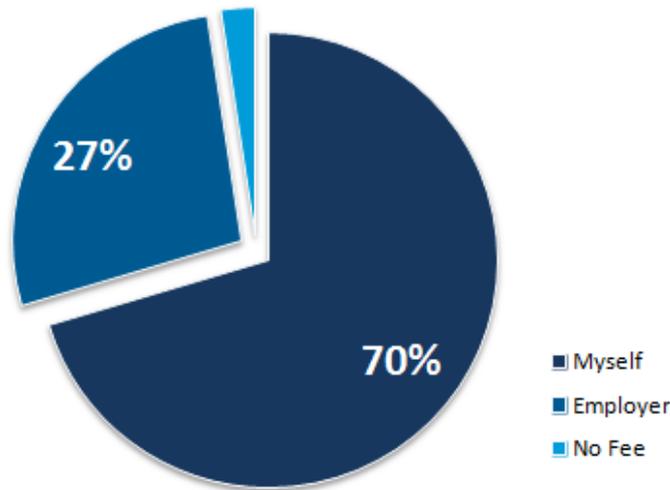
Membership fees - who pays?

To determine the impact of membership fees on renewal and other aspects of member satisfaction, two (2) questions were asked about membership fees.

The first question asks members who pays their membership fees, themselves or their employer. The second question in relation to membership fees asked members to rate the level of their membership fees.

A large majority (70%) of members pay their own fees, although 27% of members did report having their fee paid by their employer.

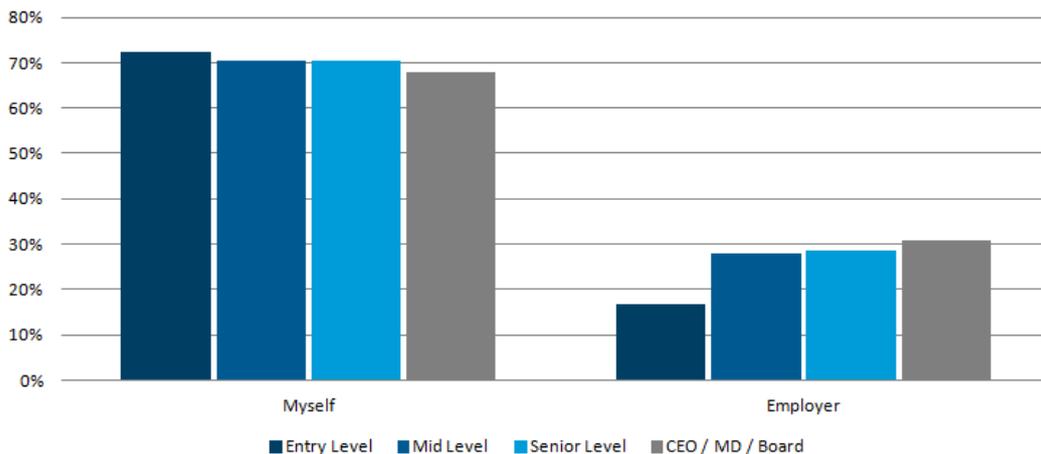
Who pays your membership fees? (n=7749)



What do different groups think?

- Employers are much more likely to pay professional association membership fees for more senior employees. 28% of mid and senior level managers and 30% of C-Level executives report that their employer pays their fees, compared to only 17% of entry level employees.

Does fee payment vary by career stage? (n=7749)

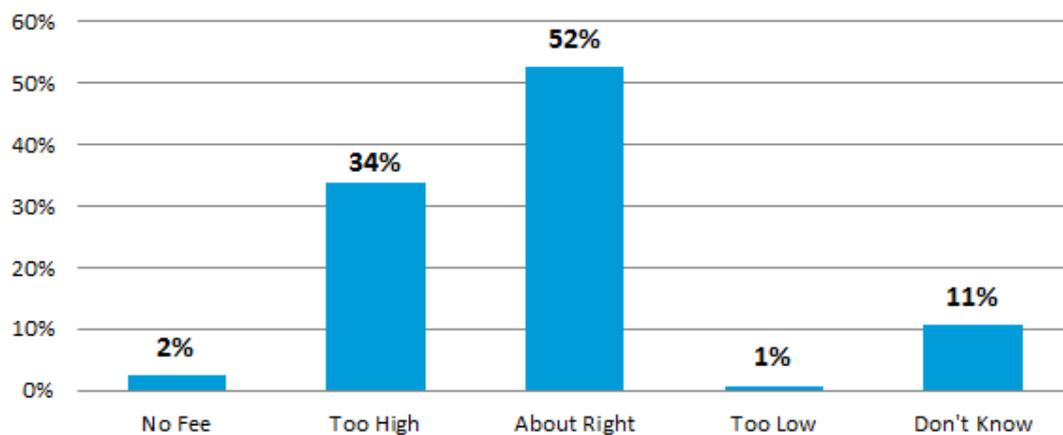




Fees - too high, too low or just right?

While a majority (52%) of respondents believe that the fees charged by their association are about right, 34% indicate that their association fees are too high. Only 1% of members rate them as too low, and 11% have no opinion.

How would you rate the current membership fee of your association? (n=7749)



What do different groups think?

- Feelings about membership fees are highly correlated to age. Young members were significantly more likely to rate the membership fees of their association as too high – 52% of members aged less than 30 rated the fees as too high. This compares to 34% of members overall, 27% of members aged over 45 and only 20% of members over 60.
- Less experienced members are also more likely to think membership fees are too high. 44% of entry and mid-level professional's rate membership fees as too high compared to only 29% of senior and 24% of C-level professionals.

"52% of members aged less than 30 rated the fees as too high."

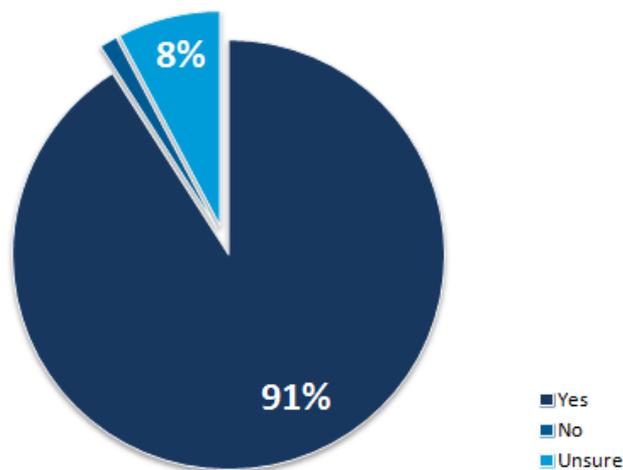


Do members intend to renew their membership?

Probably the number one question associations are interested in. Will members renew their membership? To find out, we asked them!

Overwhelmingly, it seems members do intend to renew. 91% of members indicated they would renew their membership when it came up for renewal. Only 9% of members indicated that they were either unsure or did not intend to renew.

Are you likely to renew your membership when it comes up for renewal? (n=7749)



What do different groups think?

- Renewal intentions were consistent across all age groups and career stages.
- Not surprisingly, members' whose membership fees are paid by their employer had slightly higher intention to renew than members who paid their own fees (93% versus 90% respectively).
- Membership renewal intentions were lower among members who thought that the fees charged by their associations were too high (84% compared to 91% overall). This reinforces the importance of value, lack of which was the most often given reason for members who did not intend to renew. Being too expensive was the second most often reason members give for not intending to renew.

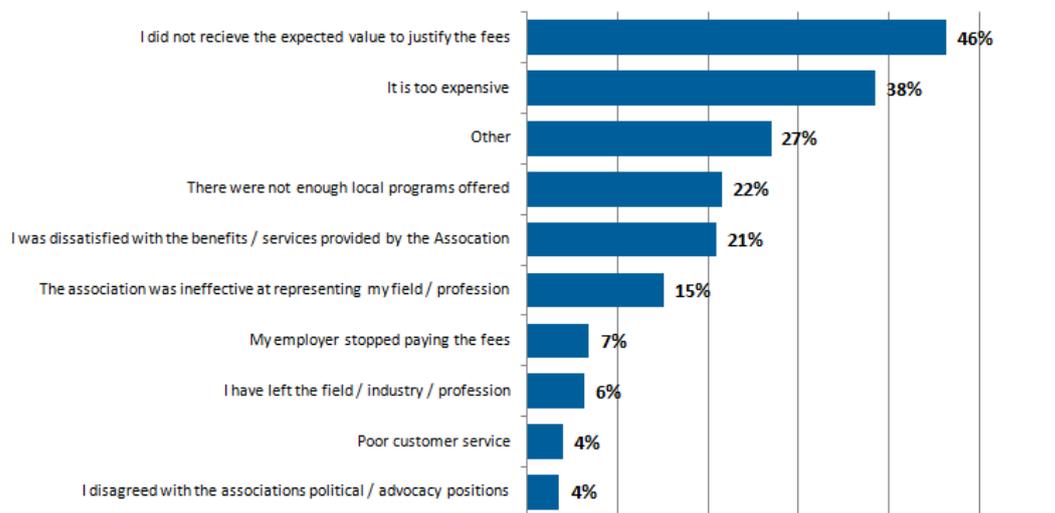


You won't renew - why not?

Members who indicated that they will not, or may not, renew their membership of their association when it comes up for renewal were then asked to provide a reason why. Results have been presented to show the percentage of respondents who selected each option, and have been ranked according to frequency.

The major reason was value. 46% of those who may not renew their membership indicated that they did not receive the expected value to justify the fees charged by their association. Cost was the next most common reason, with 38% of respondents to this question suggesting that membership fees were too expensive.

Reasons for non-renewal (n=697)



What do different groups think?

- Expense is the major reason young members provide for their intention not to renew – 64% of respondents in the youngest age group indicated that it was due to the membership fees being too expensive. This compares to 38% of members overall.
- Respondents under 30 are significantly more likely to drop their membership due to a perceived lack of value, with 59% citing lack of value as the reason they did not intend to renew. This compares to 46% of respondents overall, and only 34% of respondents aged over 60.
- Members living in capital cities are also significantly more likely to drop their membership because of concerns about value than members outside capital cities. This is despite having greater access to services and ability to be involved.
- Respondents who pay their own fees, and those who think the membership fees are too high, are also much more likely to drop their membership based on lack of value with 53% and 57% of these groups respectively giving value as the reason.



Will members recommend their association to others?

Recommendation is a major driver of membership growth. New members are often referrals by friends, associates or employers. So how likely are your members to recommend your association?

By asking a single question “How likely are you to recommend your association to a friend or colleague?” net promoter methodology divides customers into three groups in order to calculate a company’s growth potential.

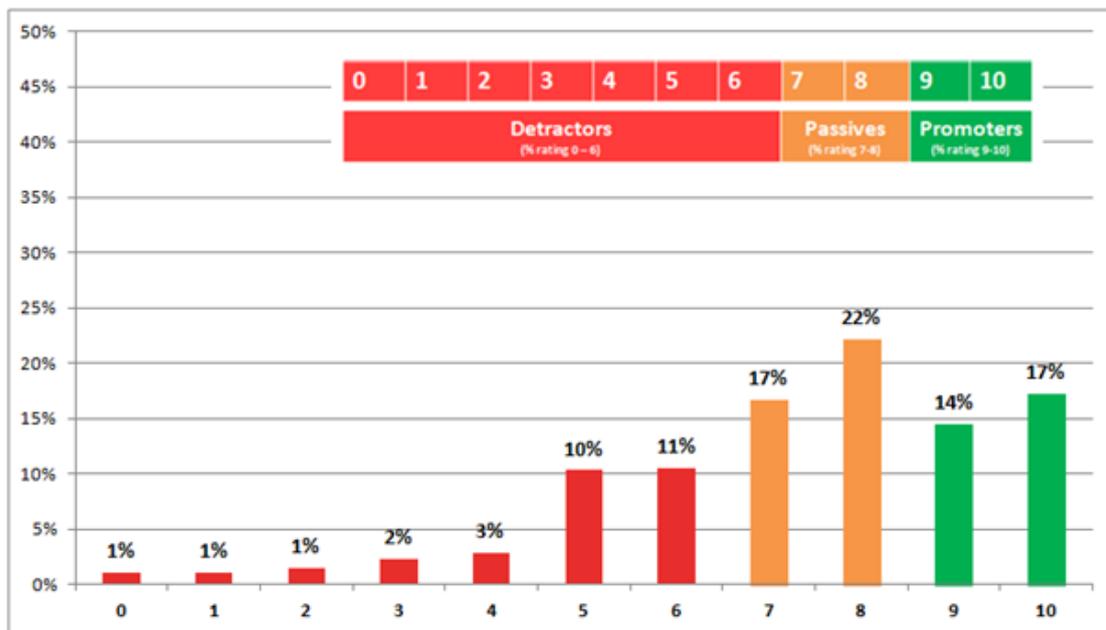
Members answer the question on a 0-to-10 point rating scale and, based on their responses, are categorized as follows:

- **Promoters** (score 9-10) are loyal enthusiasts who will refer others, fuelling growth.
- **Passives** (score 7-8) are satisfied but unenthusiastic members
- **Detractors** (score 0-6) are unhappy members who may provide negative word-of-mouth.

An organisation’s **Net Promoter Score (NPS)**¹ is calculated by subtracting the percentage of detractors from the percentage of promoters.

The overall Net Promoter Score for the **Associations Matter: 2013 State of the Sector Study** is 2.

$$\text{NPS } 2\% = \text{Promoters } 31\% - \text{Detractors } 29\%$$



¹ Net Promoter is a registered trademark of Sametrix Systems Inc., Bain & Co and Fred Reichheld



Does propensity to recommend vary between segments?

Yes, it seems it does!

Older, more senior members, those working in academia or the private sector and members living outside of capital cities are more likely to recommend their association to others. But, why? Is it that older members and academics value more highly the collegiality offered by associations, as suggested by several respondents in the qualitative feedback? Do members living outside of capital cities recommend their association to others to help them keep in touch when they feel removed from the action of the cities? Do individuals working in the private sector need the edge provided by association membership to help them keep up in a more competitive environment than government or not for profit organisations?

Those who have their fees paid by their employer are also more likely to recommend their association to others, although the reason for this is probably more obvious. The number of new members likely to recommend their association to others is also higher than those who wouldn't, most likely due to the "honeymoon" effect.

Obviously there will be a multitude of reasons why some groups of individuals are more likely to recommend their association. These are simply our suggestions, offered for your consideration only.

Net Promoter Score	NPS	Promoters	Detractors
Overall Scores			
2013 Benchmark	2%	31%	29%
Age Groups			
Under 30	-5%	25.6%	30.2%
30-45	-7%	26.7%	34.1%
45-60	7%	34.3%	27.4%
Over 60	22%	44.2%	21.8%
Career Stage			
Entry Level	4%	30.2%	25.8%
Mid Level	-9%	25.0%	34.4%
Senior Level	6%	33.9%	28.1%
CEO / MD / Board	7%	36.9%	29.6%
Organisation Type			
Private Sector	3%	33.3%	30.3%
Government	1%	29.9%	28.9%
Non-Profit Organisation	-6%	26.3%	32.0%
Academia	7%	33.6%	26.4%
Location			
Capital City	0%	31.0%	30.5%
Outside Capital City	5%	32.9%	27.7%
Fee Payment			
Self	1%	32.0%	30.6%
Employer	4%	30.7%	26.3%



Respondent comments

What is the reason for your Net Promoter Rating?

As is expected, the reasons for Net Promoter Scores (NPS) vary greatly across different association types, and members' age, gender, career stage and location. Some members may really value their association, but take the question very literally and state that they don't know anyone who would benefit from joining, whilst others will say 'I never give a score of 10' or words to that effect.

However, examining free text comments against the score they provided can have value, and lead individual associations to understand better what they are doing well, and where their members do not feel they are provided with value.

Detractors (Scores of 6 or below)

"It is expensive and the benefits can be obtained cheaper elsewhere apart from the professional status of being a member of [Association Name]" (Score 3)

"Apart from the insurance indemnity, it really doesn't offer me any benefits. It seems that [Association Name] does not cater for all people especially for members that work in the [Industry]." (Score 2)

"I don't feel connected to the association but feel that, as a professional, it's important to be a member." (Score 6)

"Not the same camaraderie that existed when I joined in 1970. Most members only come to meetings for their own benefit. Few think or act for others or the Industry as a whole." (Score 3)

Promoters (Scores of 9 or 10)

"I believe representation and support from a body within the profession is very important on both an individual basis and also as a profession as a whole." (Score 9)

"I enjoy being a part of the professional community and being up to date with the newest developments" (Score 10)

"The benefits to me, to the profession. Also that the strength of the association is significantly proportional to the support of its members " (Score 10)

"Very important source of information and support to the profession" (Score 10)



CONCLUSION

When we began exploring the feasibility of gathering benchmark data for the professional association sector, we asked ourselves many questions. Would associations want to take part? Would we attract enough interest to make the study worthwhile? What would a study of this kind contribute, and what other questions would it raise?

We received a fantastic response from Australasian professional associations, resulting in a representative sample with high result reliability. Fundamentally, this study has contributed benchmark data for Australian and New Zealand professional associations – there is now a reference point for individual associations to compare themselves against. To date this had not been available across the wide and diverse professional association environment.

We expect that opinions about the most significant findings will vary depending on the association's individual situation, their capacity to effect change and whether, or how much, they believe the most important findings are affecting them. Some of the findings, particularly around market-driven issues, may not apply to all of the participating associations; equally however, some will apply regardless of size, sectors, industry or membership type. It will be up to each individual association to decide how best to use the findings in relation to their own strategy and objectives.

There are opportunities to leverage the worth of this overall information. As well as generating valuable professional association sector information, the [Associations Matter: 2013 State of the Sector Study](#) provides an exceptional opportunity for individual associations. While all participating associations have received a copy of this Study, those who took part can also elect to have their members' responses individually analysed, reported and compared to the overall results.

Associations who have not participated in the [Associations Matter: 2013 State of the Sector Study](#), and who would like to benchmark the performance of their own association, also have an opportunity to benefit from this Study. Survey Matters is able to conduct a custom Associations Matter survey on behalf of your organisation. The survey will be based on the same questionnaire used in the wider Associations Matter Study, and can include custom questions.

A second Associations Matter: State of the Sector Study (Professional Associations) is also planned for next year. Please contact us if you would like to be notified when the study is open to participants. We welcome any suggestions or ideas to improve the process, or regarding additional questions that you think might be appropriate.

Both of these options will benefit the collaborative aspects of association research. Data from both can be added to the existing findings, creating greater depth of information and continuously building on the overall pool of data. It will also expand our ability to segment the data by industry, creating sector-specific profiles for associations to use when crafting strategies and product offerings. Future research can be tracked and monitored to compare progress and improvements over time.

Finally, we trust that this Study provides useful benefits to the professional association sector and that, if nothing else, gives you some food for thought as you continue to guide and lead your associations' growth and relevance!



Top Sector Performers

Survey Matters would again like to thank all of the participating associations and their members, without whom this vital research would not have been possible.

While all participating organisations have the option to receive their own individual results benchmarked against the overall sector results, the [Associations Matter: 2013 State of the Sector Study](#) would also like to provide some public recognition of their performance.

By highlighting the top 5 associations across the member engagement & satisfaction metrics we hope to provide benchmarks for other associations to aim for. We hope also that maybe it will encourage the top performers to share some of their knowledge about what has worked for them and thereby help enhance the practice of professional association management across Australasia!

Congratulations to the high performers.

Performance by Engagement Score

Rank	Association	Association Engagement Score	Associations Matter 2013 Benchmark
1	CRANApus	82.22	73.74
2	New Zealand College of Clinical Psychologists	80.77	73.74
3	Australian Dental Association (Victorian Branch)	76.97	73.74
4	New Zealand Association of Occupational Therapists	76.47	73.74
5	Real Estate Institute NSW	75.47	73.74

Performance by Satisfaction Rating

Rank	Association	Association Satisfaction Rating (Top 2 Box Score)	Associations Matter 2013 Benchmark
1	CRANApus	92.2%	72.6%
2	New Zealand College of Clinical Psychologists	86.3%	72.6%
3	Mathematics Association of Victoria	82.0%	72.6%
4	Australian Dental Association (Victorian Branch)	78.5%	72.6%
5	Real Estate Institute NSW	76.0%	72.6%



About Survey Matters

When Survey Matters was formed in 2010, we wanted to provide a fresh approach to gathering feedback. We believe that the people who contribute to your organisation matter. That their feedback matters. And that their input into your organisation – its direction, strategy and performance – is an integral part of your success.

Stakeholder surveys provide the most effective way to gather this feedback. When done correctly, the information and ideas generated enable you to develop strategies that increase engagement and retention, improve your products and services, create loyalty and build community.

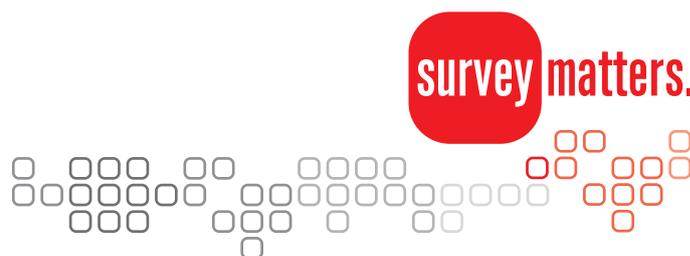
Survey Matters specialise in providing services to membership and not for profit organisations and we have helped a wide range of associations measure what matters to their members!

We conduct member surveys to provide insight into your membership services and strategy development. We help you understand the aspects of your products and services that are important and whether membership of your organisation provides value.

Our **Members Matter Surveys** are tailored to reflect your objectives, strategy and organisational culture. Reports identify the key areas for improvement, and highlight any differences between demographics, membership type or category to provide deeper insight and understanding, allowing you to

- Educate and inform your members
- Segment your membership base into relevant groups
- Discover members motivations for belonging
- Inform strategies for future products and services
- Engage your members and create enthusiasm for the outcomes
- Understand renewal intentions
- Calculate the likelihood of members to recommend you

Survey Matters are the experts in member-based research. Our Member Surveys are created with the outcomes in mind to ensure we deliver information you can act on. For help with your stakeholder survey visit us at www.surveymatters.com.au or call us on 61 3 9452 0101.





Contributors

principal partner



AuSAE

The Australasian Society
of Association Executives

The Australasian Society of Association Executives (AuSAE) is the peak professional society representing the interests of over 10,000 chief executive officers and senior staff from associations and other non-profits across Australasia. At AuSAE our role is to represent and support the dedicated and passionate people who manage associations and other non-profit organisations.

We work to make our members as successful as possible in their careers because we know that support helps them to transform our entire sector for the better.

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