

Understanding the Membership Decision

New Research with Association Members
into Attitudes and Choices



A white paper from Willow Marketing and Audience Audit, Inc. on attitudinal segmentation in associations.



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ABSTRACT

In August 2020, Willow Marketing and Audience Audit, Inc. released first-of-its-kind research on attitudinal segmentation in associations. The study, with over 4,000 respondents, was a statistically reliable portrait of the attitudes and perceptions members have of their associations. Collected between March and June of 2020, the data was generated from both current and previous association members across the country, across professions, and of varying ages and backgrounds. The study revealed four attitudinal segments that can be found in all associations, regardless of size or industry: Believers, Leaders, Change-Seekers, and Strugglers. Once associations understand these segments, they can craft strategies and design communications that meet their members where they are.

WHY ATTITUDINAL SEGMENTATION?

How are superheroes made? We promise it's not a bite from a radioactive spider, or a lab test gone wrong. Heroes are made when they answer the call to help others achieve more and live their best lives. Doctors, firefighters, nurses, and first responders are the real-world heroes we most frequently recognize. But can associations be heroes? We would say yes. Associations are poised to become superheroes in the eyes of their members, helping them excel professionally, advocating for the needs of their industry, and connecting them to like-minded peers. But when associations act without the best interests of their members in mind, or at a disconnect with what those members need, they ultimately do a disservice to their organization, their industry, and their network.

This is why at Willow Marketing, we have pursued a research path that would give us statistically reliable, scientifically accurate data on association members, providing their organizations the data and tools they need to fulfill their calling and emerge as heroes.

But we didn't want to do it like others before us, getting caught up in demographics like organization size or industry. We wanted to take a deeper dive into the commonalities found in all member-based organizations, exploring the attitudes and perceptions of those who participate. When we connected with Audience Audit, Inc.,

we knew we were headed in the right direction. Together, we built a survey that would break down members by attitudinal segments, exploring their needs, their unique worldview, the benefits they value, and the barriers they face in their associations.

So, why attitudinal segmentation, and why now?

1. This groundbreaking research is unlike anything that's ever been done before in the association space.
2. This study focuses on attitudes and perceptions found in all associations.
3. Rather than demographic data, this research offers associations actionable insight into their membership.
4. Launching at the start of the global pandemic, this study helped us see how attitudes have shifted due to COVID-19, and how the function and role of associations may be forever changed by its impact.

HOW WE DID IT

Our Methodology

We partnered with 16 professional associations, inviting their members to participate in a 15-minute anonymous survey. We then eliminated responses that were incomplete or exhibited poor data quality, leaving us with 4,183 responses for analysis.

We weighted the data to ensure the respondent pool fairly represented the feedback from respondents working across a broad range of industries and professions.

Segments were developed using an orthogonally rotated factor analysis of agreement ratings on attitudinal statements. Neither the number of segments or their attitudinal profiles were predetermined — all arose from the mathematical analysis of the data.

The attitudinal segments revealed exist within all member-based organizations, and each segment is represented in all associations, across all ages, genders, and industries. We accurately identified these consistent attitudinal segments, and are working to provide organizations with data they can use to better understand their membership, customize communications, and build strategies that speak to their members' unique needs.





Quantitative Research with a Qualitative Twist

Research unlike anything you've seen before. That was our goal with this study, and what sets it apart is the unique take on the numbers. While previous association research has dealt primarily with "firmographic" data (industry, organization size, role, etc.), this is a quantitative approach to something that has in the past been hard to define: your members' attitudes toward your organization. Here are some of the key demographic breakdowns:

- 16** Association partners whose members participated in the survey
- 4,170** Responses leading to statistical reliability
- 87%** Individual association members
- 45%** Organizational members (work for the association)
- 6%** Past members
- 34** Questions about attitudes toward their association

Organization Types

Private Sector, Academic, Nonprofit, Retired/Seeking Work, Government, Other

Good to Know

Surveys that were incomplete were discarded. Demographic and industry information was not considered in segmenting the responses.

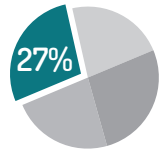
WHAT WE DISCOVERED

As we had hypothesized, our research showed definitively that members can be grouped into attitudinal segments. These segments exist across all associations, regardless of industry, size of organization, or membership demographics. The data uncovered four unique attitudinal segments of association members. These segments were not predetermined, but were defined by the data. Each segment represents a group of respondents with a unique set of attitudes and perceptions that connect them.

The Four Attitudinal Segments of Association Members

BELIEVERS

27% of all respondents fall into this category.



Believers are typically the most engaged and active members in your association. They believe in the value of membership, and see it as a way to further their career, support and learn from peers, and move their industry forward.

Fast Facts About Believers:

They see value in in-person events, networking opportunities, and want to learn from industry leaders.

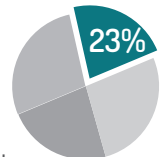
They are the most likely to have attended a local, regional, or national conference or convention.

They are not fully comfortable with virtual events or online learning.

They are at-risk due to the pandemic, as they have lost important connection opportunities.

LEADERS

23% of all respondents fall into this category.



Leaders want to be seen as knowledgeable, trustworthy thought leaders within their industry, and they believe your association can help them achieve this goal. They are quick to adopt new tools and resources if they feel they will benefit their career and their industry.

Fast Facts About Leaders:

They are comfortable with online or virtual resources, and are quick to take advantage of them.

They are the most likely segment to have participated in online learning and continuing education courses.

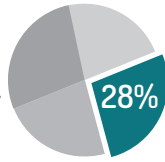
Many of them use your association to obtain professional certifications.

They may seek opportunities to participate in mentorship programs, research, and online groups.



CHANGE-SEEKERS

28% of all respondents fall into this category.



The largest group of respondents, Change-Seekers have their sights set toward the future. They seek out new opportunities to learn and connect with peers in new ways, and push associations to adopt new technologies, new strategies, and new attitudes.

Fast Facts About Change-Seekers:

They are the most likely segment to participate in online learning and virtual events.

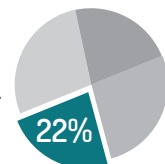
They are quick adopters and are ready to try out new tools and technology that keep them connected.

They thrive on social media and appreciate virtual communications.

The increase in virtual offerings due to the pandemic has Change-Seekers excited and looking for more ways to participate online.

STRUGGLERS

22% of all respondents fall into this category.



Strugglers need help to stay engaged and recognize the value in their association. They face both personal and professional barriers that prevent them from fully participating. They expect organizations to prove their worth before they can invest themselves.

Fast Facts About Strugglers:

Strugglers worry about their industry, the future of their role within it, and their ability to achieve success in it.

They prefer to hear about trends, best practices, and ways to stay competitive in their career.

They are the least comfortable with online and virtual events.

They are the most skeptical of the value and relevance of associations, particularly during uncertain times.

BREAKING DOWN THE DATA

Demographics

While our study did not focus on demographic data, the numbers do play an important role in understanding to which segments your members belong. Through our research, we discovered that all segments could be found across demographics, but segments can tend toward a particular demographic characteristic.

- 23% (a majority) of respondents were in the 51-60 age range. Believers and Leaders are slightly more likely to be older than Change-Seekers and Strugglers.
- 70% of respondents are women, making up 77% of Change-Seekers. Men (30% of respondents) are slightly more likely to fall into the Leader segment.
- Respondents in the academic world were more likely to fall into the Struggler category, while Believers are more prevalent in the public sector.
- While the majority of respondents work in organizations smaller than 100 people, 28% responded they work in organizations of 101-1,000, and 28% in organizations of more than 1,000. Change-Seekers were slightly more likely to be found in the largest organizations, but all segments are found in organizations of all sizes.
- A majority of respondents say they maintain memberships in 2-3 organizations. Surprisingly, Strugglers were the largest number in this category. Leaders were more likely to respond that they were members in more than 3 associations.

Challenges

The challenges faced by respondents were both at the organizational and the association level. While Strugglers faced the most barriers overall, each segment had its own unique set of issues based on attitudes and perceptions.

- 52% of Strugglers cite retention as their largest organizational challenge. They also noted issues in keeping up with best practices (43%) and industry advocacy (42%).



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- 44% of Change-Seekers said they saw organizational challenges in keeping up with trends and new developments.
- Leaders worried more about maintaining compliance and keeping up-to-date on changing regulations in their industry (36%).
- 63% of respondents say it is important to understand the mission and goals of their association, but 37% say they don't, or only "sort of," understand them.
- Similarly, 62% of respondents feel it is very important for associations to provide leadership within their industry, but more than half (52%) feel their association is "sort of," "not really," or "not at all" providing leadership.

Engagement with Associations

While the majority of respondents are individual association members, many also cited that their organization holds a membership, which allows them to participate in association events and take advantage of other benefits. A majority (59%) also say their organization reimburses them for association-related costs.

- 83% of respondents have engaged virtually via webinar, podcast, or other online event.
- 72% have engaged in-person by attending a local or regional event.
- 66% have attended an in-person national conference or trade show.
- Only 2% say they have never participated in either an online or in-person event.
- Leaders are most likely to have obtained a professional certification through their association. They are also the most likely to have participated in an online group or community.
- Believers lead in attending in-person events, including local, regional, and national. They are also the most likely to have utilized training or continuing education resources.
- Change-Seekers are least likely to have attended any in-person event.

Value of Associations

Across all segments, members find great value in the resources, events, and tools offered by their associations. While the weight placed on each offering varies across segments, members from each indicated they see value in all areas.

- The top association activities in which members find value relate to continuing education, training, industry trends, research, and career development.
- Change-Seekers are less likely to find value in in-person networking events, while Believers are most likely.
- Change-Seekers find more value than other segments in opportunities for online networking.
- Strugglers find less value in associations encouraging others (both professional and younger people) to work in their profession or industry. They are also the least likely to find value in professional certifications.

ASK THE EXPERTS

Brad Gillum, owner and president of Willow Marketing

Susan Baier, founder and president of Audience Audit, Inc.

Brad, what makes the attitudinal segmentation research you conducted with Audience Audit so unique?

Brad: It's all about our approach. In the past, most association research has focused on demographics and statistics like age, industry, or company size. With this study, Willow broke new ground in the association space by identifying the attitudes defining different groups first and then looking at other characteristics to see if they are differentiating when it comes to attitudes. In most cases, we find that they're not, as we found in this study.

Susan, what led you to start a company like Audience Audit, Inc.?

Susan: I've worked with a lot of agencies and organizations, and I found that many of them were just "going on their gut" to make important marketing and



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communications strategy and decisions. I wanted to make this kind of research accessible to them, so they can rely on data rather than just instinct.

Brad, you say this study is statistically reliable. For those who aren't "numbers people," how do you explain statistical reliability?

Brad: I think when research is conducted correctly and broken down simply, we can all be numbers people! Susan has a great analogy that I believe makes it easy to understand. All you have to do is think about soup. When you're making soup, you don't just take out one ingredient to taste it. You take out a spoonful. It's a small amount in proportion to an entire pot, but it gives you the full flavor profile of the soup. Then, you know exactly what's inside, and what you need to add. Our research is that spoonful. We had enough respondents to get a complete taste of the types of association members out there. So no matter how big your pot of soup is, you'll be able to find all those same ingredients inside.

Now that the research exists, how should associations use it?

Brad: The research tells us what the landscape looks like, but doesn't in itself tell any association what to do with that information. Each organization will need to determine how to make the best decisions strategically and tactically based on what they learn. However, the research can help them do that, by giving them a deeper understanding of their members. I like to say that it's more like fishing than hunting. You can't target these members based on demographics, but you can put out the content you know will attract them, and be ready to reel them in.

THE IMPACT OF COVID-19

Brad discusses how the pandemic is changing member perceptions of associations

Although we had been in the planning stages of our research for months, the launch of the survey coincided with the beginning stages of the COVID-19 pandemic here in the U.S. While this presented unique challenges, it allowed us to quickly adapt and reconfigure our survey to ask members specifically about the challenges and impact brought on by the virus.

Has COVID-19 impacted employment of association members?

Brad: Yes. 10% of respondents report that they are currently furloughed or laid off from their full-time positions. Two-thirds of them say this is due to the COVID crisis.

Has the value associations offer members been impacted by the pandemic?

Brad: Yes, but it's not all bad news. While some segments (mainly Believers) feel that the loss of in-person events is a negative impact, other segments (primarily Change-Seekers) feel that the move to online and virtual events is a positive and valuable one. 62% say the pandemic has shaken up associations in a good way, and see a positive impact.

Will associations continue to provide valuable benefits to members through the remainder of the pandemic?

Brad: One-third of respondents say they are unsure associations will be able to provide the same benefits, though the remainder believes they will. Strugglers are most skeptical about their association's ability to continue meaningful and valuable offerings, while Change-Seekers are the most optimistic.

Are members comfortable with the idea of attending in-person events in 2020?

Brad: Confidence in in-person networking opportunities drops significantly when forecasting through Q3 and Q4. A vast majority of respondents say they are more comfortable with online networking and events through the remainder of 2020, with Change-Seekers leading the charge.

Will a shift to online networking change the way members view their associations?

Brad: As long as associations continue to provide important and helpful content to their various member segments, the shift from in-person to online networking should be something members are willing to make. Some segments and members may need help getting comfortable with networking online, however.



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INTERPRETING AND IMPLEMENTING THE DATA

This study presents a unique opportunity unlike anything associations have had previously to segment, strategize, and speak to members in the ways they prefer. Knowing the way members are thinking and feeling is key to branding, marketing, and connecting on a deeper level.

Here are a few sample scenarios that may help you understand how attitudinal segmentation can aid you in reaching your members in a more meaningful way.

For Instance:

You have assessed and identified a group of Believers in your organization, and realize they may be struggling with the lack of in-person events due to the pandemic.

Response:

You create a custom email list for members who wish to be made aware of updates to in-person events, including rescheduled or canceled events, and ways to get involved while they wait. Help them see how fun and effective online networking can be!

For Instance:

You have noticed that more members are taking advantage of online offerings and virtual events.

Response:

These are likely your organization's Change-Seekers. They value online assets and forward-thinking associations. Consider expanding your virtual services and be sure to market with them in mind.

For Instance:

You've noticed your website isn't seeing as much traffic as you'd like, and you suspect it's because the user experience does not appeal to all members.

Response:

You work with an agency like Willow Marketing to lay out a user journey for your website that directly meets the needs of your targeted segments, giving them an easy path to the information they want to find.

For Instance:

A number of current members have become inactive, or their participation is beginning to drop off.

Response:

These members may fall into the Struggler category, and will need some nurturing. Craft custom messaging related to industry trends and best practices to help them see the value in your organization.

For Instance:

You wish to grow the number of Leaders that exist within your association.

Response:

Amplify the services you provide that will position them as thought leaders within your industry. Give them opportunities to continue their education, participate in mentorship programs, or pursue professional certifications. Give them a platform from which to share their expertise — at your conferences, in webinars or podcast interviews, or writing posts for your association.

For Instance:

Your email open rate is down, and click-thru has significantly declined, in spite of having a robust email list.

Response:

Segment your list by attitudinal segment and craft newsletters and other communications that are specific and unique to each. Much of the content may overlap, but the framing and tone will differ for each segment.

For Instance:

Blog traffic is low and your members seem less engaged with the content you're creating.

Response:

Create subcategories for blog posts that are tailored to each attitudinal segment. Make sure the content is relevant to the intended segment and provides information that addresses one of their concerns, or offers a benefit that is in line with their interest in your organization.



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Keep in Mind:

- Your communications should be tailored to address the needs and values of each segment.
- It is important that your association does not cater to one segment while alienating another.
- Understand the barriers each segment faces, and look at solutions that will help them better engage.
- Remember that we are in uncertain times, and the ways members engaged before are not necessarily how they intend or wish to engage now.

Quick Stats

58% of respondents use LinkedIn for networking

58% also use Facebook for networking

91% of Believers feel that learning from others' expertise is the most important part of networking

5.4 (out of 6):

“Hearing from Experts” ranked the most important conference benefit

61% of respondents across all segments would promote their association to others within their profession

Nearly all respondents

said it was vital that those in their profession work together to overcome challenges, and that associations need to help

SUMMARY

The four segments identified in this research can and will be found in your association, regardless of its size or industry. Depending on your member base, you may find that some segments are more prevalent than others for your association. Once you work to identify them, you can craft messaging and strategy that meets their needs, eases their worries, and helps them see the value your organization provides. We know that the way associations are viewed is changing, and is significantly impacted by our current situation, but those organizations who listen to their members and look to their needs can become the heroes they deserve. This research shows that the way members access information is not as important as the quality and value of the information. Though this is a challenging and uncertain time — for associations and for the nation — it is the ideal time for associations to step up and show up for their members.