

Exploring Member Mindsets
Meeting Your Members
Where They Are

GIVING MEMBERS A LIFT IN THE
POST-2020 ASSOCIATION COMMUNITY



A white paper from Willow Marketing's exclusive association member attitudinal segmentation research study. Part of the Willow Association Series. Research in partnership with Susan Baier of Audience Audit, Inc.

Abstract

One year ago, in the midst of an unprecedented global pandemic, we presented groundbreaking research that identified association members by behavioral segments, aligned with their individual beliefs, attitudes and perceptions of their organizations. COVID-19 struck the U.S. during our data collection process, and greatly impacted our results, giving us a surprising and reassuring view into how valuable association membership is to our respondents during their most difficult times. Now, we have revisited this unique research approach to take the pulse of association memberships in a not-quite-post-COVID world.

Our methodology looks primarily at psychographics versus demographics, and groups respondents into three unique subsets based on their current attitudes toward associations. In the process, we have uncovered valuable insight into the ways associations are meeting (or in some cases, failing to meet) the evolving needs of their members.

In this paper, we present our findings, the insights that can be drawn from them, and the ways associations can interpret the data to better support members in the wake of professional, financial, personal and societal volatility.

Why Attitudinal Segmentation?

In 2020, our first foray into attitudinal research was an experiment to hone in on traits shared among segments of association members. We weren't certain what we might uncover, but the results were staggering. Individual members could, in fact, be grouped into attitudinal segments based on their perceptions and beliefs about their organizations – from perceived value to their likelihood to continue their membership. In the course of our research, we identified four attitudinal segments: Believers, Leaders, Change-Seekers and Strugglers. By interpreting and analyzing the data, we were able to give associations key insights into ways they could better engage with their membership, and meet individual members' needs.

What was most fascinating about our study was our finding that these segments existed in every single organization. While the breakdown varied based on a number of factors, we discovered that all four segments could be found, identified, and messaged to within each association.

A year later, confident that this approach provides unique and helpful insights, we decided to conduct yet another attitudinal study to learn, we decided to revisit attitudinal segmentation, to learn how member needs and perceptions had evolved throughout the uncertainty of the pandemic. Once again, we found that member behaviors and attitudes could be grouped into distinct segments that were present across all of the industries and member organizations surveyed.

We have once again made it our aim to break down this data and draw out actionable insights associations can apply to their membership to better meet them where they are.

How We Did It

Our Methodology

We worked with 14 organizations in the U.S. and around the world, distributing thousands of surveys to members. Members came from all age groups, professional and personal backgrounds, across numerous industries, and several organization types – including professional, philanthropic, trade, credentialing, and others.

Where Quantitative Research Meets Qualitative Insights

Our previous groundbreaking research methodology set the tone and guided this latest study. While we gathered demographic and industry data, our segmentation analysis focused solely on the attitudes of respondents. It identified three distinct segments of current member attitudes toward associations. These segments were not predetermined, but were instead revealed by analysis of the data. Here's a breakdown of who participated:



What We Discovered

Based on our previous research, we entered our research confident that we would once again be able to identify clearly delineated segments of association members based on attitude. This time around, we also hypothesized that those segments might look quite a bit different after a year of ongoing uncertainty. We explored this with questions carefully focused on how members are feeling about their jobs, their employers, and their industry.

Ultimately, we were able to identify three unique attitudinal segments based on how the associations make their members feel. These feelings spanned demographics, including ages, genders and industries. They were again found in all organizations, regardless of any external factors. Knowing the differences between these attitudinal segments and being able to identify them within your organization will help you adapt your services, your language and your perspective to better meet the needs of your members.

The 3 Attitudinal Segments of Perceived Association Support

THE 3 ATTITUDINAL SEGMENTS OF PERCEIVED ASSOCIATION SUPPORT:

Supported

34.8% of all respondents fall into this category.

These members feel strongly that their clients and associations are meeting their current needs, and offering the services and support required to improve their career, their profession and the industry. They maintain a type of “warm-fuzzy” feeling about their association, citing that they feel welcomed, and believe the organization cares about their needs.

Fast Facts About Supported Members:

- Overall, supported members struggle less with perceived challenges around being valued, compensated and respected in their careers.
- At the organizational level, supported members find retaining qualified employees to be the biggest challenge, but still far less than the other segments.
- They are more likely to indicate a better work/life balance.
- Overall, they have felt less of an impact from the pandemic, and do not believe the last year has changed the way they view their career.

THE 3 ATTITUDINAL SEGMENTS OF PERCEIVED ASSOCIATION SUPPORT:

Frustrated

30.6% of all respondents fall into this category.

Frustrated members don't necessarily place all the blame for their negative feelings on their association. Instead, they may feel disillusioned with their career, employer or industry, and may even be actively looking for a career change (whether with a different company, or an entirely different profession).

Fast Facts About Frustrated Members:

- The biggest challenge they face with work is feeling valued for their contributions.
- They often feel they aren't as respected as the rest of their colleagues, and aren't as highly compensated.
- They are on-par with diversity-seeking members in feeling their organization doesn't provide enough resources for professional development.
- They have felt the biggest impact from the pandemic, and are in search of new opportunities.
- They are more likely to believe their association only cares about them at renewal time.

THE 3 ATTITUDINAL SEGMENTS OF PERCEIVED ASSOCIATION SUPPORT:

Diversity-Seeking

34.6% of all respondents fall into this category.

Diversity-seeking members are ready for change. They have felt a significant impact from the events of the last eighteen months, and may feel lonely, stressed out or dissatisfied. They long for greater diversity and inclusivity in their organization, but feel isolated from peers and colleagues. They feel that association support and leadership is lacking, on a personal and organizational level.

Fast Facts About Diversity-Seeking Members:

- Diversity-seekers are more likely to struggle with a lack of opportunities to learn from others with different backgrounds and perspectives.
- They are more likely to perceive that their organization struggles with making all employees feel valued and respected.
- Diversity-seekers are slightly more interested in career development and training opportunities than other segments.
- They are less concerned with advancing their careers quickly, and more concerned with addressing a lack of diversity and inclusion in their current organization.

Breaking Down the Data

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.

- Respondents ranged in age from from under 21 to over 70.
- 72% of respondents identified as white.
- 87% of all respondents are currently employed (by an organization or self-employed).
- 50% of unemployed respondents indicated their current status is due to COVID-19.

BREAKING DOWN THE DATA:

Challenges

Challenges varied significantly between segments, both at the organizational and individual levels. It's important to note that while Supported Members cited fewer overall challenges, they still listed numerous issues they are currently facing, primarily related to their own career growth.

- Even if Supported Members are generally happy with their associations, that only makes up roughly one-third of respondents. This leaves two-thirds feeling dissatisfied, and therefore more at risk of leaving the organization.
- The biggest challenge across segments was feeling valued for their contributions, with Frustrated Members struggling the most.
- 38% of Frustrated Members are looking for a job or career change that will be more rewarding.
- Diversity-seeking members are more than twice as likely (54%) to be concerned with building a more diverse workforce than Supported Members (22%)
- The largest groups of Frustrated or Diversity-Seeking Members (those facing the biggest challenges), were in the 30-70 age range, which likely makes up the biggest portion of your membership.

BREAKING DOWN THE DATA:

Member Perception of Value

While the majority of respondents indicated they still find value in association membership, a significant portion are more skeptical. This could be due in large part to the response of associations in the midst of the COVID-19 crisis, or it could be part of previously neglected issues brought to light by the pandemic. In any case, when perceived value slips, associations must act quickly to maintain membership, adapting both strategically and tactically to reach members wherever they are.

- 64% of respondents say they find their association “absolutely essential” or “always helpful.” However, 35% indicate their organization is only “sometimes” or “not very” helpful, revealing a huge opportunity to speak to these members before they drop off.
- Individual annual memberships are no longer the preference. 38% said they were more interested in an a la carte model, where benefits and services could be added as needed, and 36% preferred a multi-year or lifetime membership model.
- Frustrated Members were most interested in picking and choosing the benefits and services they want to pay for.
- 54% responded that they believed associations would benefit from having different membership options available, with Frustrated Members being the largest group in support.
- 52% are certain they will renew their membership, with another 34% saying they probably would. Another 13% responded “maybe,” “probably not,” or “definitely not.”
- Continuing education and professional development continues as the most valuable benefit, with 70% saying it is what influences them to renew.
- Supported members also ranked research/resources, industry trends and opportunities to connect with peers very highly.
- 42% said that membership dues were only “okay,” or “not a very good value.”
- 70% of Supported Members would be likely to recommend membership to peers. That number drops to 43% for Diversity-Seekers and just 30% for Frustrated Members.

BREAKING DOWN THE DATA:

Diversity, Equity & Inclusion

In 2020, amidst overwhelming social unrest, we saw more attention in the association space turn to diversity, equity and inclusion (DEI). Many organizations adapted their DEI policies, or placed more emphasis on them, while others weren't sure where to start. The demand for stronger DEI policies, particularly among Diversity-Seekers, is high.

- Nearly all respondents said they were familiar with the terms “diversity,” “equity” and “inclusion.” Number did not vary significantly between segments.
- 77% of respondents said they were aware that “diversity” and “inclusion” do not mean the same thing. The number was higher among Diversity-Seekers, but not substantially so.
- 92% of all respondents believe that it is extremely or somewhat important to have a more diverse workforce.
- And yet, only 16% gave their organization an “excellent” rating in this area. Supported Members were much more likely to give a more favorable rating.
- 62% said that it was “extremely important” for their association to have a diverse member community. Another 30% said it was “somewhat important.”
- Again, just 16% of respondents rated their association as “excellent” in this area.
- Equity seemed to be slightly favored over diversity, with 97% saying it was extremely or somewhat important in both their association or organization.
- 98% said that inclusion is extremely or somewhat important.
- But again, fewer than 20% rated their organization or association as “excellent.”
- 52% of respondents indicated their organization has a documented DEI policy, while close to 40% were unsure.
- 55% said they believed it was extremely important that their association maintains an ADA-compliant website, but 69% aren't sure if theirs is.

BREAKING DOWN THE DATA:

Engagement

The way members engage with both associations and other professionals has been forever altered by the events of the past 18 months. Our last study indicated that many members were reluctant to adopt virtual events and networking opportunities. This year, we see that the way members engage in the digital space depends heavily on their attitude about the association.

- Supported Members were the most likely to use social media to connect and network with peers. As this segment is primarily made up of Believers, this is a change, as Believers previously were slow to adopt virtual networking.
- The primary reason for networking with industry peers was identified as “learning from their expertise.”
- Frustrated members were the most likely (54%) to state that they use networking to find potential employment opportunities.
- Both Supported Members and Diversity-Seekers indicated they used networking to form connections with peers, offer support or simply because they like them. Frustrated Members lagged far behind in these areas.

Ask the Expert

DIVERSITY, EQUITY AND INCLUSION IN THE ASSOCIATION SPACE WITH BRAD GILLUM, OWNER AND PRESIDENT OF WILLOW MARKETING

What was the most significant finding from this new study?

The biggest finding was certainly significant, but it wasn't surprising. After the events of the last 18 months, it's not shocking that most members have a higher interest in how their associations plan and commit to DEI initiatives. More than ever before, this is an area prospective members seek out when evaluating a new association, and it's also a key decision-maker when it comes to membership renewal.

Was there anything uncovered by the research that did surprise you?

Yes. I was surprised that while many respondents, especially Diversity-Seekers are more interested in DEI policies and initiatives than ever before, a large majority did not know if their association had a policy in place, or had any future plans to implement one. This is a critical opportunity that associations must act on if they want to best meet the needs of their members.

What other opportunities did the research uncover?

I think there's a chance to focus more on maintaining an ADA-compliant website. Many respondents weren't sure what that is, and many more didn't know if their association's website is in compliance. ADA-compliant websites make key information and engagement opportunities more accessible to members. Not having one will exclude some members and impede their access to resources and information.

What can associations do with these findings around DEI?

They can take immediate and decisive action. DEI is about much more than just having a statement on your website. It's implementing initiatives that bring change. It's also making tools and resources available to members, and promoting them widely so members know how to access them.

Interpreting & Implementing the Data

There is a wealth of opportunity that was uncovered in our latest research. We can see clearly now that COVID-19 had a significant impact on members, and in some cases, has altered their viewpoint on the overall value of associations. Just 35% of members surveyed are doing well. The remainder are struggling, and without addressing their needs, associations may be jeopardizing more than half their membership.

To combat this vulnerability, associations must implement new strategies and tactics to retain members and continue delivering the benefits and value they expect. The following pages contain several sample scenarios that may help you understand how attitudinal segmentation can aid you in meeting your members where they are.

Sample Scenarios

For Instance:

Your Frustrated Members are facing uncertainty in their industry and in their own careers. They are worried, anxious and disengaged from association activities.

Response:

You develop messaging around self-care in the midst of traumatic circumstances that is sent out to this segment. You cover topics like how to avoid professional burnout, and highlight encouraging industry trends.

For Instance:

You have noticed that more members are engaging with your association on social media.

Response:

These are likely your Supported Member and also Believers. They are your biggest and most important advocates. Consider building a social ambassador program to help them feel active and useful, and allow them to reach out to under-engaged segments.

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 update your website to be ADA-compliant, to provide greater access to all members and ensure they are able to easily find the information they need.

For Instance:

Overall membership is dropping, but particularly among diverse members.

Response:

All Diversity-Seekers, whether they themselves are minorities or not, want to see how your association is responding to heightened awareness of diversity, equity and inclusion. Conduct an audit of your DEI policy (or create one, if you don't have one already), make adjustments to ensure that it is robust and comprehensive, then communicate it with members. Hold a virtual Q&A session, plan a roundtable event, or offer DEI-related educational courses and training.

For Instance:

Annual membership is dropping, and renewals are on the decline.

Response:

Consider revisiting your membership model, and potentially adding options that allow greater flexibility and control, while managing the overall cost to members. Not all members will want or need every benefit your association provides, to structure a renewal plan that allows them to choose what works best for them.

For Instance:

As the world returns to normal, or adjust to the “new normal.” you find that participation in events (both in-person and virtual) is low.

Response:

Realize that each segment within your organization faces struggles and challenges, even your Supported Members. After a long period of uncertainty, many will be reluctant to jump back into in-person events, while others are burnt out on virtual options. Be sure your messaging is transparent about safety precautions and cancellation policies, and consider offering hybrid events that allow both an in-person or virtual option, depending on comfort level and ability to attend.

Keep in Mind

- You need to be tactical in your approach to attitudinal segment communications. Tailor your messages to the unique needs and values of each.
- 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 still in the midst of uncertainty, and fluctuations in member engagement are expected and normal. Look at ways to offer services and benefits that are flexible and accessible to all segments, no matter how they prefer to engage with your organization.

Summary

The three segments identified by our latest research study can be found across your association. After a year of unrest and uncertainty, all are facing challenges, and many have an altered perception of your association and the value it provides. The first step in leveraging this data to improve member services and retention is to identify these segments within your organization.

Once you understand their unique struggles, needs and concerns, you will be better equipped to meet them where they are. We are not yet out of these tumultuous times, but as an organization, you are now better able to evaluate changing circumstances and adapt to the evolving needs of your members.

Quick Stats

- Just 35% of all respondents are doing well (Supported Members) and even they face challenges.
- The largest number of Supported Members are under the age of 30, or over the age of 70. Look into how you can better reach and support your target demographics in the middle.
- 65% of members are in the Frustrated or Diversity-Seeking segments, and have additional needs they expect your association to meet.
- 40% of members do not know if their association has a DEI policy.
- 62% of members say that a diverse member community is extremely important, but only 16% rate their association as “excellent” in this area.

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