



Effects of the Digital Age on Society Membership

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Connecting Great Ideas and Great People



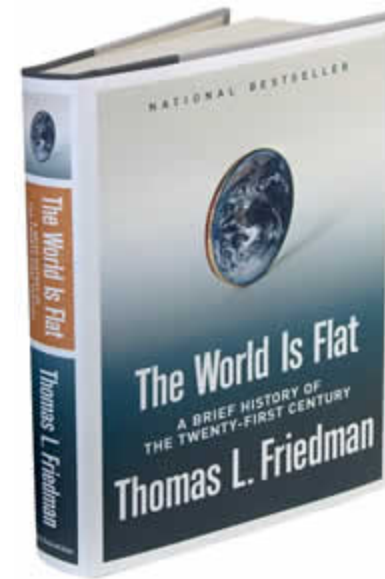
“Every morning in Africa, a gazelle wakes up. It knows it must run faster than the fastest lion or it will be killed. Every morning a lion wakes up. It knows it must outrun the slowest gazelle or it will starve to death. It doesn't matter whether you are a lion or a gazelle. When the sun comes up, you better start running.”

-African proverb



What is a “Flat World”?

Defined by bestselling author Thomas Friedman as “... a global, Web-enabled playing field that allows for multiple forms of collaboration on research and work in real time, without regard to geography, distance or, in the near future, even language.”



A Global Market

Friedman's global playing field driven by 10 "flatteners" including



- Collapse of Berlin Wall
- Netscape (making Internet accessible for everyone)
- Workflow software



Impact of Technology

- Continued growth in web access and e-commerce.
- Nearly 1.5 billion will be online in 2008, and one-third of those will have high-speed connection.
- Online shopping expected to grow at annual rate of 17%, resulting in online sales of \$1 trillion by 2012.



Impact of Technology

- Associations face additional competition for members' time and interests.
- Face-to-face meetings still important, but benefits of membership must be accessible 24-7.
- Web and social media technology (i.e. blogs, wikis, social networking sites, etc.) increasingly seen as tools for engaging members.



Member Needs Assessment

According to ASAE & The Center's 2007 Needs Assessment report,

- Significant increase in members' reporting participation in virtual programs.
- Majority (52%) reported making decisions about virtual vs. face-to-face based on convenience.
- 13% prefer electronic, 23% prefer combination of virtual and face-to-face, and 11% prefer face-to-face.



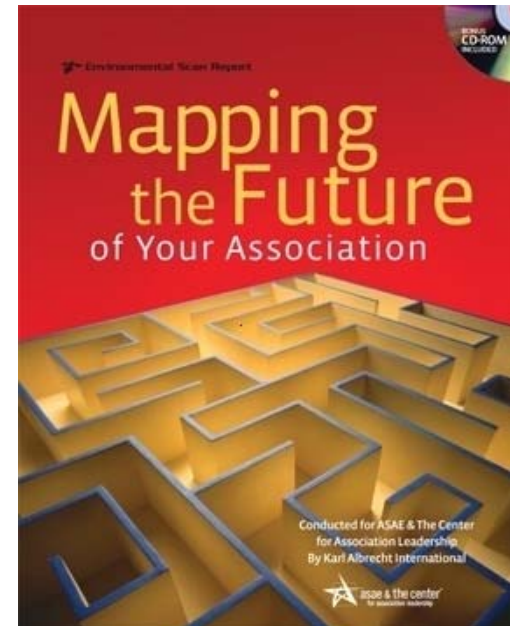
Member Needs Assessment

- Networking is equally important to members as education. In-person networking more important to association staff than CEOs.
- In terms of information and resources on website, both importance and satisfaction have increased since 2006.
- Interest in connecting virtually with others was rated an average of 3.5 on the 5-pt scale. Average was higher for assn staff (3.8)



Mapping the Future

ASAE & The Center's *Mapping the Future* (2006) is an environmental scan used by associations to prepare for a new and ever-changing business environment.



Eight Super-Trends

From Mapping the Future

1. Customer: *Demassification*

The mass market is breaking into smaller pieces. Members are interested in focused efforts to meet their needs, not one size fits all.

2. Competitor: *Unbundling*

Increased competition is pressuring associations to offer products and services *a la carte* rather than as an organized package.

3. Economic: *Scrimping*

Economically, members - and their employers - are looking for a greater return on investment in association membership.



Eight Super-Trends

From Mapping the Future

4. Technology: *Wave 3.1*

The growth of technology has made information a profitless commodity. Competitive advantage lies in enriching professional development, learning and connectivity through knowledge.

5. Social: *Virtualization*

A highly mobile society has disintegrated traditional communities, and enhanced the appeal of Web-based virtual experiences as a form of fellowship and networking. To maintain their strength as community builders, associations must serve a growing appetite for virtual connections, while continuing to offer personal experiences.



Eight Super-Trends

From Mapping the Future

6. Political: *Cyber-Mobbing*

With the channels of political influence broadening to include digital media, associations must develop a creative and Web-savvy approach to advocacy.

7. Legal: *Scrutiny*

With special-interest legislation and litigation on the rise, associations must operate transparently in the areas of governance, advocacy, and political activity.

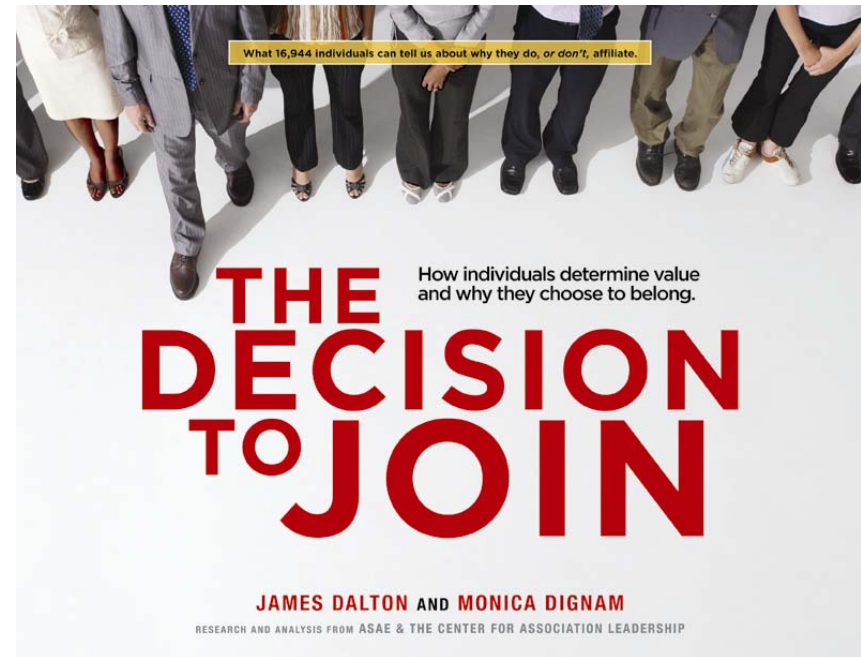
8. Geophysical: *Counter-Americanism*

To operate globally, associations must develop localized models of association culture, governance and politics.



Decision to Join

- Identifies factors that influence individuals' decision to join associations.
- Analysis of close to 17,000 respondents.
- Most comprehensive research on member psychology in 20+ years.



Decision to Join

Key findings include:

- Individual decision to join does not hinge on cost-benefit calculation. Choice goes beyond self interests to include assessment of “good of the order” benefits.
- Members whose dues are paid by their employers value membership as much as those who pay their own.
- Notion that elected leaders are the “voice of the members” warrants closer look.



Decision to Join

- Young people rate association offerings such as career information and employment opportunities as important but rank as low associations' performance in servicing those needs.
- Member enthusiasm takes off with ad hoc involvement in activities such as writing, presenting and reviewing content.



Decision to Join

- Academics are among the strongest association supporters. They are also in a unique position to influence entry-level people.
- Non-U.S. respondents express more interest in networking and ad hoc volunteering than do their U.S. counterparts - raising interesting considerations as membership populations take on a more global flavor.





Questions?





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