



ASB Strategic Research:
Overall Study Findings & Recommendations

September 2011

ASB Strategic Research with Members & Non-Members: OVERALL STUDY FINDINGS & RECOMMENDATIONS

I. INTRODUCTION & METHODS

Cypress Research Associates conducted research on behalf of the American Society of Baking (ASB) to determine how ASB can better serve the needs of its current members and attract new members. The following methodological approaches were used:

- 1) Spring ASB BakingTech evaluation survey
- 2) In-depth telephone interviews with key ASB members & eligible non-members
- 3) Online survey of ASB members & eligible non-members.

All interview and online survey questions were developed through collaboration with an ASB research team comprised of the Executive Director of ASB and key ASB member leaders. ASB provided Cypress Research Associates Excel databases of potential participants for all three methods used, with the exception of non-members for the phase 3 survey; the database of non-members was acquired from AIB International.

II. RESPONSE RATES

Following is an outline of response rates for the three methodological approaches used.

A. CONFERENCE EVALUATION

The ASB BakingTech 2011 online survey was initially deployed on March 18, 2011, followed by 5 customized reminder email deployments. ASB provided Cypress Research Associates with a list of 931 conference attendees. **Completed surveys were received from 401 individuals for a 43% response rate.**

B. IN-DEPTH TELEPHONE INTERVIEWS

Telephone interviews were conducted in January through April 2011 with a goal of 20 interviews (10 members, 10 non-members). **Interviews were conducted with 11 current members and 10 eligible non-members.**

C. ONLINE SURVEY

An online survey was deployed to all current ASB members and eligible non-members in August and September 2011. **Completed surveys were received from 425 of 1,263 members, for a 34% response rate. Among non-members, completed surveys were received from 34 of 266, for a 13% response rate.**

III. KEY STUDY FINDINGS & RECOMMENDATIONS

A. MARKETING/NEW MEMBER RECRUITMENT

KEY RECOMMENDATION: Marketing/New Member Recruitment

Target the following market segments and individuals in new ASB expansion efforts:

Market segments

- ✓ Mid-size and small wholesale bakery manufacturers
- ✓ Cakes/muffins/other sweet goods
- ✓ Frozen dough/par-baked
- ✓ Large bakeries (which will attract smaller bakeries, non-traditional bakeries, allied)

Individuals

- ✓ Younger professionals (including AIB BS&T graduates and graduates of college baking programs)
- ✓ Senior-level executives

Interview participants and *survey* participants alike indicated that ASB continues to primarily focus on the bread and bun industry segment. According to *in-depth telephone interviews*, 10 of 11 ASB *member* interviewees stated that ASB continues to have a heavy bread and rolls slant. And 9 of the 11 members feel that ASB needs to more purposefully focus on additional product categories. Six of 10 *non-member* interviewees indicated that a main reason they are not members of ASB is because ASB's focus is not a good fit for them. And 7 of the 10 *non-member* interviewees also feel that ASB needs to broaden its focus beyond the bread and bun segment. Interview results also showed that executives see value in targeting large bakeries (which will attract smaller bakeries, non-traditional bakeries, and allied) and in attracting younger professionals and senior-level executives.

In the *online survey*, baking industry executives were presented with a list of market segments and asked to indicate which segment(s) ASB should primarily target in new expansion efforts. Respondents indicated that ASB should target the following segments:

- ✓ Mid-size and small wholesale bakery manufacturers (62%)
- ✓ Cakes and other sweet goods (29%)
- ✓ Frozen dough/par-baked (24%)

KEY RECOMMENDATION: Marketing/New Member Recruitment

Better promote ASB membership to expanded market segments and potential members through:

- ✓ Targeted marketing efforts (particularly to AIB BS&T grads, graduates of college baking programs, baking companies)
- ✓ Membership drives led by current members
- ✓ Mentoring fellow employees into ASB membership, particularly younger employees

Four out of 10 *non-member interview* participants indicated that they have very little understanding of ASB and have not received promotional membership information on the organization. *Member interview* participants suggested that membership drives and targeted marketing efforts would be helpful in attracting younger baking professionals and non-traditional bakers.

Online survey findings also reveal that the top 2 reasons non-members indicated they are not members of ASB is because:

- They are not familiar with the organization or with the benefits of membership (50%).
- They have never received membership information and have not been asked to join (35%).

Approximately three-fourths of ASB members indicated they see value in mentoring their fellow employees into ASB membership. This was particularly true among Allies (83%) and Bakery Manufacturers (78%).

KEY RECOMMENDATION: Marketing/New Member Recruitment

Focus on the following ASB membership benefits in promotional materials:

- ✓ Networking opportunities
- ✓ Educational benefits (particularly those that would appeal to younger people and senior-level executives)
- ✓ Professional recognition/development

'Valuable networking opportunities' came to mind for many *interview* participants (both members and non-members alike) when asked what comes to mind when they think of ASB. *Interview* participants also suggested that ASB needs to be marketed as an improved organization with valuable benefits including networking, educational benefits and professional recognition/development. Members who were *interviewed* identified educational improvements as the primary way to improve the member experience suggesting a shift in BakingTech focus on networking to equal focus on education, focus on new technologies, and more breakout sessions. *Interviewed* members also indicated that the Bakers Hall of Fame program is a good model for professional recognition/development (in addition to the overall BakingTech experience).

Online survey participants were asked to rate the value of being a member of an industry trade association on a 7-point scale (7='Very valuable'). The value of being an association member was rated highest among:

- ✓ Members (vs. non-members)
- ✓ Sales/marketing and corporate management positions (vs. R&D/QA and Ops/Manuf/Eng.)
- ✓ Baker members age 61 or over (vs. younger members)

In the *online survey*, industry executives were also asked to rate the importance of various industry trade association benefits on a 7-point scale (7='Very important'). On average, the three most important perceived benefits of trade association membership were:

- ✓ Networking opportunities (6.0)
- ✓ Educational benefits (5.2)
- ✓ Professional recognition/development (5.2)

Segmentation of *online survey* results reveals:

- ✓ **Non-members** rated the importance of all member benefits higher than members.
- ✓ **Bakery manufacturers** view **educational benefits** as more important than the other segments (i.e., ingredient manufacturers, equipment manufacturers, and other allies).
- ✓ Among bakery manufacturer members, **sales and marketing executives** rated all five member benefits listed as significantly more important than the other job positions, particularly in the area of networking opportunities and competitive business edge.
- ✓ **18-40 year olds** rated the importance of **networking opportunities** significantly higher than the other age groups at **6.3**. Executives age 61+ rated the importance of educational benefits, competitive business edge, and professional recognition/development significantly higher than the other age groups.

In the *online* survey, executives were asked to indicate which baking industry trade association performs best in six assessment areas (e.g., education benefits, competitive business edge). Survey participants were presented with a list of the following 8 trade associations: AACC, ABA, ASB, BEMA, BCMA, IFT, SFA and TIA. Respondents were also given the option of selecting 'no difference'. (There was an insufficient number of non-member responses to this survey item to allow for segmentation by this subgroup.)

ASB was selected by members as the clear leader among the trade associations listed for the following benefits, indicating these areas of strength for ASB:

- Networking opportunities (50%)
- Education benefits (40%)
- Professional recognition & development (43%)

Other trade associations were selected or members selected 'no difference' among associations for the following:

- Competitive business edge
- Member offers & discounts
- Legislative, regulatory, lobbying

KEY RECOMMENDATION: Marketing/New Member Recruitment

Work to improve ASB's image in the following areas:

- ✓ Innovative (vs. stagnant)
- ✓ High-tech (vs. low-tech)
- ✓ Thriving (vs. declining)
- ✓ Young and progressive (vs. 'old boy's club')

'Old boy's club' came to mind for several *interview* participants (all current ASB members) when asked what comes to mind when they think of ASB.

Survey participants were asked to rate ASB on a 7-point semantic differential scale anchored by 7 bipolar adjective pairs (e.g., expensive vs. good value, stuffy vs. friendly). Among the sample as a whole, executives tended to view ASB as *slightly more*:

- 'Friendly' (vs. 'stuffy')
- 'Helpful for my job' (vs. 'not helpful for my job')
- 'Good value' (vs. 'expensive')

Respondents were more middle-of-the-road in their opinions of ASB in the following dimensions, indicating more negative perceptions of ASB on these dimensions:

- Stagnant vs. innovative
- Low-tech vs. high-tech
- Declining vs. thriving

Executives tended to view ASB as an:

- 'Old boy's club' (vs. young & progressive)

Non-members rated ASB significantly lower than members for all 7 pairs, averaging 4.0 on the 7-point semantic differential scale.

KEY RECOMMENDATION: Marketing/New Member Recruitment**Use the following methods to communicate with current/potential members:**

- ✓ E-newsletters as primary method
- ✓ ASB website
- ✓ LinkedIn, Facebook, Twitter for industry professionals age 18-40

Survey respondents overwhelmingly agreed that e-newsletters are their preferred method of communication from ASB regarding association business and events, at 85%. Thirty-five percent of respondents also selected the ASB website. Respondents age 18-40 were more likely to select 'LinkedIn', 'Facebook' and 'Twitter' as additional methods of communication compared to those above 40 years.

B. PROGRAMS AND SERVICES

KEY RECOMMENDATION: Programs & Services

- ✓ **Offer online education/webinars**
 - Convenient and cost effective
 - Topics should be focused on important trends and issues affecting the industry
 - Would attract younger members
 - Should be provided to non-members as well
- ✓ **Offer additional networking opportunities that are more interactive in nature:**
 - Offer opportunities for more active idea exchange about best practices, new ideas, new products, industry trends
 - Offer social media networking to attract younger professionals
 - Offer a searchable database of members via Facebook or LinkedIn

Interview participants suggested attracting new members by offering education content via electronic formats including webinars. *Interview* participants also suggested that ASB offer more networking opportunities, particularly involving active idea exchange about best practices, new ideas, new products, industry trends.

Survey respondents were asked to indicate how valuable it would be if ASB offered a list of 8 specific program and service concepts in order to better serve current members and gain new members. Among the overall sample, respondents rated the following programs and services as most valuable (on a 7-point scale where 7='Very Valuable'):

- ✓ More in-person networking opportunities (5.3)
- ✓ Webinars (5.2)
- ✓ Online education/training courses (5.1)

Segmentation of *online survey* results reveals:

- ✓ Non-members rated the value of all 8 programs and services listed as higher than ASB members. Non-members were particularly interested in:
 - Webinars (5.7)
 - ASB Industry Certification Program (5.7)
 - More in-person networking opportunities (5.6)
 - Online education/training courses (5.4)
- ✓ Bakery manufacturers were less interested in ASB offering more in-person networking opportunities than the other industry sectors. Bakery manufacturers were also slightly more interested in webinars and regional ASB chapter meetings than equipment and ingredient manufacturers.
- ✓ Among bakery manufactures only, sales and marketing executives were more interested in in-person networking opportunities (6.3) and a young executives' chapter of ASB (5.4) than other job functions. Corporate management executives were more interested in an ASB Industry Certification Program than other employees.

KEY RECOMMENDATION: Programs & Services**Consider offering individualized professional mentoring:**

- ✓ Set clear goals and structure around the mentoring relationship
- ✓ Avoid conflicts of interest by setting ground rules
- ✓ Market the advantages of the program

Interview participants liked the idea of individualized mentoring for younger professionals, but suggested avoiding conflicts of interest by setting ground rules and setting clear goals for the mentoring relationship.

Online survey results indicated significantly more non-member interest in a mentoring program (5.2) than members (4.6 on a 7-point scale).

KEY RECOMMENDATION: Programs & Services for Young Professionals**Offer more educational program content (including online) targeted to young professionals:**

- ✓ That offers direct career/job benefits
- ✓ That demonstrates that industry is forward thinking so young professionals stay in baking industry
- ✓ Practical, unique content/can apply immediately

Develop a Young Executives Chapter of ASB

- ✓ Offer ideas for career development
- ✓ Provide a forum for young executives to exchange ideas, knowledge

Offer opportunities for online social media/networking

Several *non-member interviewees* suggested that AIB could attract new members by offering more tangible, direct value, including more educational opportunities. Members and non-members alike suggested that AIB offer educational program content better targeted to young professionals.

Interview participants liked the idea of developing a Young Executives Chapter of ASB. They suggested that the chapter should offer ideas for career development and provide a forum for young executives to exchange ideas and knowledge.

According to *survey* results, member respondents age 18-40, rated the performance of ASB's 'educational benefits' and ASB's ability to provide them with a 'competitive business edge' significantly lower than other member age groups (5.0 and 4.2, respectively on a 7-point scale). Younger ASB members were more interested in a young executives' chapter of ASB (6.0), online education/training courses (5.8) and online/social media networking (5.2) than their older counterparts.

KEY RECOMMENDATION: Programs & Services for Non-Traditional Bakers**Offer more educational program content targeted to non-traditional bakers:**

- ✓ Provide ingredient and engineering-focused information/education
- ✓ Cover more emerging/hot-button industry issues
- ✓ Show application of session content to multiple industry segments

When asked how to attract non-traditional bakers to join ASB, *interview* participants suggested providing education program content on ingredients, engineering, hot-button issues while showing application to multiple industry segments.

When asked which segments ASB should primarily target (in addition to bread and rolls), survey results showed the greatest level of interest in expanding the reach to mid-size and smaller wholesale bakers (62%) followed by cakes and other sweet goods (29%) and frozen dough (24%).

KEY RECOMMENDATION: Programs & Services – BakingTech

- ✓ Promote shift in BakingTech from focus on networking to equal focus on education
- ✓ Continue to play the role of bringing together the various baking industry segments (ABA, AIB, BEMA)
- ✓ Increase number of breakout sessions so participants can have more than one opportunity to attend a specific session
- ✓ Include prominent keynote speakers at BakingTech as a draw for senior level executives
- ✓ Focus on new/emerging baking & ingredient technologies and new equipment technologies

Interview respondents were asked how ASB could improve the value of their membership. Participants gave suggestions for specific improvements to BakingTech. Interviewees also suggested including more prominent keynote speakers at BakingTech as a draw for senior level executives.

According to the BakingTech *conference evaluation*, attendees suggested the following topics for future sessions, which could also be a focus on online education efforts:

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|--|-------------------------------|
| • New/emerging baking & ingredient technologies* | • Governmental regulations |
| • New equipment technologies* | • Food safety |
| • General business, management | • Global food trends |
| • Consumer trends | • Product & ingredient trends |
| • Sustainability | • Packaging innovation |

*most frequently cited