

2009 IVCA Membership Survey

Welcome

This newsletter presents the key findings from the IVCA’s second independent membership survey conducted by Woodnewton Associates. The research was carried out between 16th September – 9th October 2009 through an online survey, with 106 members taking part.

Some of the core questions replicate the 2008 survey in order to track changes in attitudes. Additional questions were asked in new areas, such as staff training and industry information. Full results of the survey are available on the IVCA website.

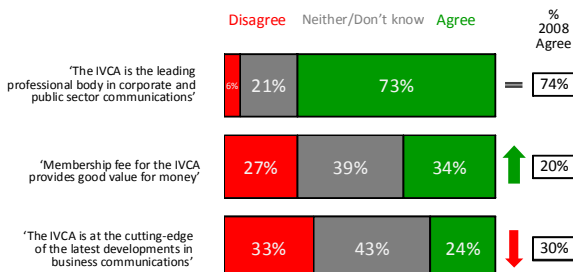
Key Findings

- Levels of satisfaction with the IVCA membership remains the same as in 2008 – with twice as many members satisfied than dissatisfied with their membership overall (43% satisfied vs. 19% dissatisfied).
- As in 2008, members feel that maximising UK market opportunities, developing contacts, representing the industry, providing effective networking between producers and clients and developing business are the most important activities that the IVCA should be involved in.
- Members want to see the IVCA website become a place to showcase their work. Improvements to the online Handbook and more frequent, low-priced networking events for smaller organisations were also recommended.
- There is a broad consensus that the IVCA should relocate to central London (67% think it is a good idea).
- 57% percent of members say validation of training courses by the IVCA would be an important factor on their decision when thinking about commissioning a training provider. On average, over a quarter of staff in member organisations expect to receive training by an external provider in 2010.
- Members are optimistic about their financial performance in 2010 with seven in ten (69%) expecting their organisation’s financial performance in 2010 to be better than in 2009. Nine in ten also expect staffing levels to either increase (32%) or stay about the same (57%) in the next 12 months.

Membership Overall

IVCA overall

Please indicate how much you agree or disagree with the following statements about the IVCA



As in 2008, twice as many members would speak highly about the IVCA (41%) than be critical about it. A significant proportion said that they would be neutral (37%)

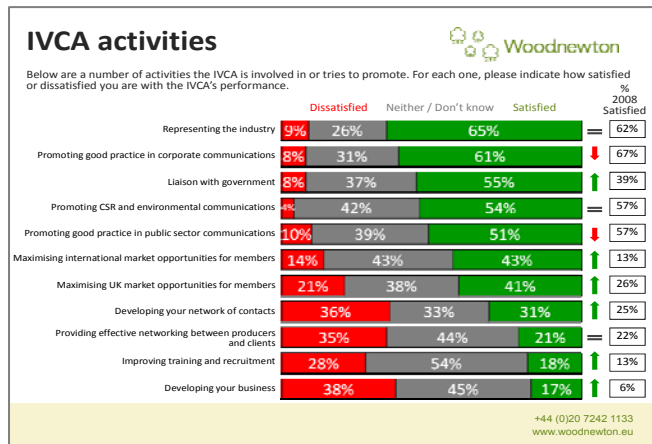
The chart on the left shows that three quarters of members (73%) agree that the IVCA is the leading professional body in corporate and public sector communications.

The proportion of members who think the IVCA provides good value for money has risen 14% to 34%. But the proportion who believe it is at the cutting-edge of latest developments in business communications is down 6% to 24%

IVCA Activities

The activities provided by the IVCA which are most important to the business needs of members are: **maximising UK market opportunities, developing networks of contacts, representing the industry, providing effective networking between producers & clients and developing business.**

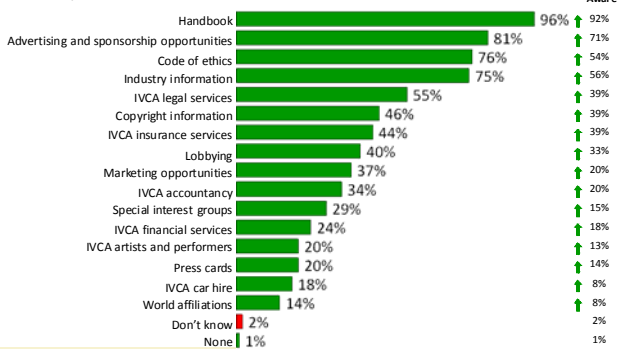
The chart on the right shows that members are most satisfied with performance of the IVCA in representing the industry (65% satisfied); promoting good practise in corporate communications (61%) and liaison with government (55%).



IVCA Benefits and Services

Benefits and services (Awareness)

Which, if any, of the following membership benefits and services are you aware the IVCA provides?



Awareness across all IVCA membership benefits and services is up from levels recorded in the 2008 survey. With the **Handbook and Industry Information being the most used service on offer – as well as being amongst the services which members are most satisfied with.**

The chart shows that relatively few members are aware of many of the benefits and services available to them – for example around two in ten or less are aware of the press cards, car hire and world affiliation benefits and services.

This is also reflected in the low usage rates across most of the benefits and services on offer.

The Future

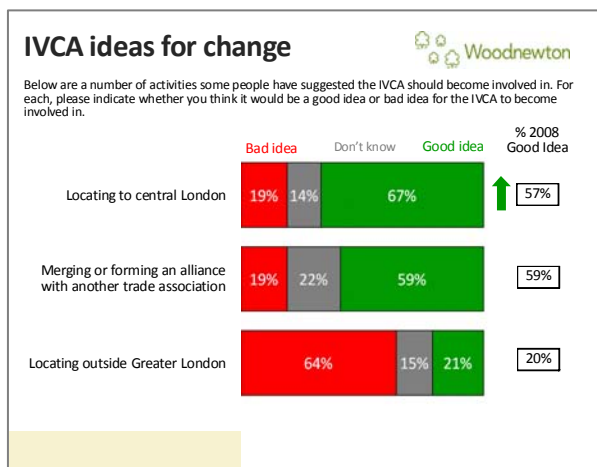
Though six in ten IVCA members (59%) think that merging or forming an alliance with another trade association is a good idea, more support the IVCA locating to a central London location (67% good idea), as shown in the chart to the right. Most are opposed to the IVCA locating outside Greater London.

Below is a set of typical responses when we asked members to make one recommendation for future IVCA improvement:

"The website needs to be updated and easier to navigate around, have the membership handbook online."

"It would be useful to have many more low cost networking / information events."

"Continue to seek actual business opportunities for production companies in the UK and internationally."



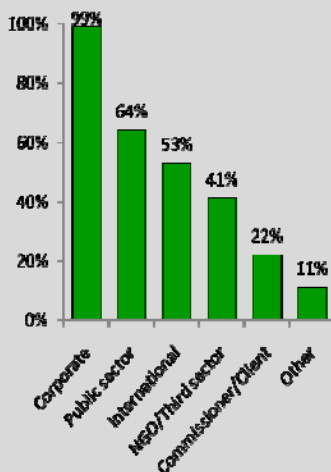
Industry Information and Financial Performance

This year the Member Survey sought to gather information about member organisations and the industry in which they work, in order for the IVCA to understand the make-up of the organisations within the membership, which sectors they work in and types of businesses they represent.

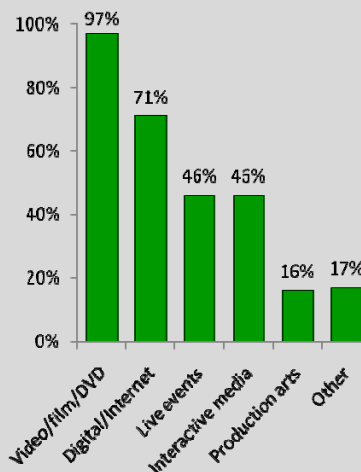
Three quarters of IVCA members / member organisations are based in London (60%) or the South East (16%) – the following three locations where members / member organisations are based include the East Midlands (6%), the South West (4%) and outside the UK (4%).

The private sector amounts to 40% of turnover in member organisations – 33% from the government sector and 25% charities/third sector. There is an expectation that the level of turnover coming from the government sector will be worse in the future.

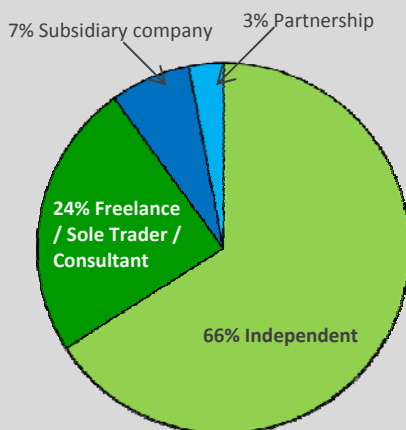
What sector or sectors do you/your organisation work in?



What media do you/your organisation work in?



What kind of business are you?



34%

of IVCA members expect their organisation's financial performance in 2009 to be better than in 2008.

69%

of IVCA members expect their organisation's financial performance in 2010 to be better than in 2009.