BEDA Survey of Membership
Benefits offered by Professional Designers’ Associations
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A survey carried out by

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BACKGROUND INFORMATION

The **BEDA MEMBERSHIP BENEFITS SURVEY** was developed for BEDA by the “Cluster on Membership Benefits” to map the existing benefits and services delivered by professional designers’ associations as well as other organisations representing and supporting design practitioners in Europe. The objective was to better understand the expectations of, as well as the services delivered to, the members of both BEDA members and other associations delivering such services throughout Europe.

For the purpose of being able to follow up on particularly interesting data, the survey was not conducted anonymously. However, discretion with regard to direct reference to individuals or organisations in the subsequent report was promised.

The survey was sent to approximately 75 identified organisations representing design practitioners around Europe. Furthermore, links to the survey was shared through the BEDA Newsletter.

After the initial deployment of the survey, two bulk reminder mails as well as a dozen “private” reminders were sent to respondents, who would have been expected to possess valuable information.

As a result of the combined efforts, the number of responses in total ended at 28 – whereof 26 are valid and complete responses from representative bodies across 19 European countries.

The assumption is that the knowledge gathered through the survey will enable BEDA to share best practices of how the practice of design is promoted and supported in Europe, as well as to inform the development of policies or other relevant initiatives in a **Design Europe 2021** context.
EXECUTIVE SUMMARY

The survey results to a certain degree dismantle a myth that has grown to be something, we seem to accept without questioning; that membership organisations at large struggle and slowly slide towards extinction. That does not seem to be the case. Among the 21 organisations responding to the question of whether they have experienced growth or decline during the time period 2000 – 2015, two organisations - 10% were stable – a surprising 52% - 11 organisations had growth, and a modest 38% - 8 experienced decline. This may also explain a rather optimistic outlook on the future, as a vast majority foresees either growth or stability, while less than a third foresee decline in membership and revenue. Having said that, there is no doubt that some associations struggle, and some have survived despite dramatic decline – as much as 90% over the last 15 years – or 70%, 53% or 33% – all significant numbers, which – assuming that the services offered did not change first – reflect a severe change in the demand for the services of a professional design association, caused by either new competition, new needs or new structural conditions. As part of the follow-up of the survey, the five associations with the highest growth as well as the five with the most dramatic decline have been asked to elaborate on what they assess to be the determining factors for either.

More than half of the respondent associations depend – to varying degrees – on public funding, and more than three out of four depend on other sources of income than membership fees. There seems to be very little correlation between the extent of non-member revenue and the extent of growth or decline, and there are no definite trends among the associations receiving public funding as to whether they will depend more or less on such funding in the future – other than around half of them assessing the support to remain steady.

The associations deliver a wide range of services – material as well as immaterial – with a distinct focus on the one-to-one experience. Networking events and various forms of counsel and advice top the lists of both what is being offered and which services are the most valued. This is quite important, as the justification of associations like many of the BEDA members rests in the ability to facilitate meetings, conversations and exchange of knowledge and inspiration in real life, as there are countless sources of parallel, digitally delivered services – paid for as well as free. This does not mean that the internet and all its offerings does not compete with and have an influence on the demand for “traditional” associations, but it shows that there is still a need for and an appreciation of what can only be shared in a physical environment.

*The overall picture is that of a landscape of predominantly small membership dependent organisations, rarely reflecting the importance and magnitude of the value created by professional designers, but which – for the most part – are kicking and alive, believing in the future and fulfilling an important need.*
Some figures to observe while reading this report: The total annual operating budgets of the 26 respondents add up to an estimated € 10-15 millions. If we believe that these figures mirror the overall picture – hence including non-responding organisations, the total revenue of the associations representing professional designers in Europe would be around € 30-45 millions, which does not come across as a lot in light of EUIPO’s assessment that there are approximately 410,000 design professionals in Europe, generating an annual value of € 36 billion. It means that out of the € 87,000 that each professional designer creates of value, less than € 100 is spent on supporting the activities taking place within the realm of the professional design associations – inclusive of funding provided by public authorities, sponsors and private partners.
DEMOGRAPHICS

The following are key figures representing the demography of the respondents:

- 26 completed surveys
- 23 national bodies
- 2 organizations with international scope
- 1 member based network associated to a university
- 19 countries
- 11 BEDA members
- 15 non-members
- 14 respondents based on individual membership
- 9 respondents based on combined membership (individual / corporate)
- 2 respondent based on corporate membership only
- 1 network of associations
- 20 representing a multidisciplinary constituency
- 4 representing graphic design / visual communication
- 9 respondents disposing of a budget of less than €100.000
- 7 respondents disposing of a budget of €100.000 – 500.000
- 6 respondents disposing of a budget of €500.000 – 1.000.000
- 4 respondents disposing of a budget of > €1.000.000 – none > €1,5 m
- 9 organisations established before 1960, 2 in the 60’, 2 in the 70’, 5 in the 80’, 3 in the 90’ and 4 after 2000 (25)
- 5 organisations have less than 100 individual members, 3 between 100 and 250, 5 between 250 and 500, 5 between 500 and 1000 and 6 more than 1000 (24)
- Those dozen associations having corporate members have between 30 and 500 (except from one that has 2 – two – and one that has 4 corporate members)

GENDER BALANCE

The gender balance on a European scale is close to 50 / 50 – reflecting the balance in a vast majority of organisations.

FEE LEVELS

Individual member fee levels vary from less than €10 to €630 / year – the average being very close to €200, student fees are averagely around €40 and the average corporate member fee ranges from €25 to €3000 with an overall average of approximately €1300 / year.
SOURCES OF INCOME

More than half of all associations (54%) receive public funding – from 5 to 90 % in return for

- being partner in / managing projects
- supplying information on developments in the industry and data
- publications, promotional activities and communication

Approximately 77% of the associations depend on other funding than membership fees - in return for

- sponsorships
- sales of products and services to members and externally
- revenue from organising events
- commissions on products and services promoted to members
- design management fees
- IPR / copyright funds management

SERVICES DELIVERED

We asked about the extent to which “tangible” and “intangible” services respectively are rendered by the associations. As far as “tangible” services go – defined as services, which can be enjoyed or consumed by the individual member, all but one organisation deliver “networking” activities. Other activities ranked by appearance in replies:

- Printed / online journals, magazines or other forms of publications (69%)
- Award scheme(s) / competitions (65%)
- Membership of / access to benefits delivered by other organizations (65%)
- Joint promotional activities (62%)
- Title / accreditation / certificate (62%)
- Legal advice / IPR counsel (58%)
- Business support / business related consultancy (54%)
- Continuous professional development / education (54%)
- Access to rebates on products / consumables for professional use (46%)
- Matchmaking services / directories / listings (46%)
- Access to advantageous insurances / pension schemes / financial services / other services (35%)
- Career counselling (27%)
- Access to rebates on other products and services for private use (27%)
- Scholarships (15%)
With regard to “intangible” services – defined as services aiming at strengthening the community of professional designers and design firms collectively, the replies are very much alike, regardless of the respondent association’s “anatomy”. The last five services were listed by individual associations under “other”:

- Lobbying, political influence and representation (88%)  
- Press and media coverage and presence (73%)  
- Representation of members in other trade organisations / chamber of commerce (58%)  
- reaction to rogue competitions (4%)  
- tax benefits (4%)  
- placements as speakers (conferences), jury members (awards) (4%)  
- design policy, design development plans (4%)  
- planning of events like DesignMarch / DesignPrize / international projects / managing governmental DesignFund (4%)  

The following services were listed as among the three most valuable services offered by the respondent association:

- legal advice / IPR counsel (50%)  
- publications / information (38%)  
- networking (36%)  
- joint export promotion (29%)  
- exhibition space/opportunities (25%)  
- professional events (21%)  
- matchmaking (21%)  
- lobbying (17%)  
- title / accreditation / certification (17%)  
- benchmarking tools (salaries / fees) (12%)  
- counselling / personal support (12%)  
- tax benefits (8%)  
- awards (8%)  

Other services mentioned; competitions, grants, direct sales opportunities, rebates

**GROWTH, DECLINE AND FORECASTS**

Five organisations refrained from replying to this question. Among the 21 organisations responding, 10% were stable - 52% had growth – 38% decline.

- 2 organisations experienced no change in membership over the period  
- 4 organisations declined by more than 50% - 4 between 0 and 50 %  
- 5 organisations grew by more than 50% - 6 between 0 and 50 %

The most dramatic decline registered during the period is by 90% - followed by 2 x 70, 53 and 33 %, while the most impressive growth was by 335% - followed by 200, 115, 100 and 80 %.
The rather encouraging picture is also reflected in the assessments of membership satisfaction. Around half of the associations measure the satisfaction of members on a regular basis – among the rest, some undertake ad-hoc or after event surveys. The overall satisfaction is assessed to be:

- very satisfied: 12%
- satisfied: 38%
- somewhat satisfied: 38%
- somewhat unsatisfied: 0%
- unsatisfied: 4%
- unknown: 8%

And, when asking the respondents to look into the future, the positive attitude continues and is actually reinforced, with regard to the forecasted developments in both membership and revenue:

As for the development in membership, 46% foresee growth, 35% foresee a steady development on current level, while only 19% foresee a decline in membership. A very similar picture is conveyed with regard to revenue with 48% foreseeing growth, 33% no change compared to today and – again – only 19% foresee a decrease in revenue.

Among the 22 associations dependent – to various extents – on non-member funding, whether public or private, 29% foresee a growing, 57% unchanged and only 14% less dependency on “external” co-funding than today.

In an attempt to discover to which extent the “survival” of professional design associations will require increased focus on tangible as opposed to intangible membership services, no help was given. The forecasts offered point towards equal focus on developing and delivering both kinds of services.

**SWOT ANALYSIS**

Already at the outset, we acknowledged that this exercise could prove a little demanding for some, and we were right to the extent that only 10 out of 26 respondents decided to engage in it. However, the analyses conveyed are interesting.

While the survey posed no restrictions on the information given under this heading, except from the guiding S for strengths, W for weaknesses, O for opportunities and T for threats, for the purpose of extracting value from the exercise, I have decided to cluster the information into four main categories:

- innovation, quality, funding and delivery of services
- organisational robustness, capabilities and capacity
- concept, strategy, profile and reputation
- politics, legislation, structural factors and external relations
The most significant strengths identified relate to the first and third categories; the quality and relevance of the services provided, the role as exclusive and independent, often well-established, knowledgeable and respected representatives of a professional community, which enjoys political attention and a good reputation in society.

The most significant weaknesses predominantly relate to the second category; lack of funding and financial stability, lack of professional staff and overall capacity to deliver all the services that the respondents know that the members want and expect – in combination with a fragility deriving from the dependence on project funding, public grants, copyright income and/or membership fees.

The opportunities identified are a little more fragmented and relate to all four categories; to strengthen relations to external partners as well as coverage of a wider range of design and designer categories, to focus on network building and to develop new as well as improve and innovate on existing services – to benefit more from the strong relations already existing; both to government, to other sectors and professional communities, regionally and internationally – all with the ability of increasing relevance to and the attraction of new members as an end-goal.

The threats identified are much more aligned and predominantly relate to the last of the four categories - politics, legislation, structural factors and external relations. There seems to be a wide-spread fear of losing financial support as a result of political change, but also uncertainties with regard to which kinds of affiliation the designers of the future will prefer and their expectations from a professional design association, as the concept and professional identity of design itself changes.

**OTHER VALUABLE INPUT**

Asking for any other valuable input, the comments vary from the expression of worries about the future of professional design associations at large – somehow elaborations of the “threats” listed above, quite directly expressed in this comment: “What is the future of professional design organisations when engineers, sociology, and business educated people will all use design in their work. Is it their professional organisations that we will be competing with in the future, and what kind of possibilities will it give to our small organisations.” Two comments merely recognise the importance of being member of organisations, which can and must offer professional recognition and a sense of community for a professional group, where most of the practitioners are independent. Finally, two other comments point towards the need for more focus on collaboration between professional design associations and design centres as well as between European design associations with regard to fields of activities / missions / structures / needs and offers / network building – and to encourage joint applications of EU funding directed at economical and regional growth, such as Horizon 2020 and similar programmes.
FOLLOW-UP ON SURVEY

To inquire further the correlations between growth and decline and one hand and the underlying factors for same, a follow-up e-mail was sent to the five organisations with the most significant growth over the last fifteen years, as well as to the five organisations experiencing the most dramatic decline. The response to this follow-up exercise has been quite limited, despite several friendly reminders. However, based on the replies that I received – and which were both comprehensive and interesting – combined with previously accumulated knowledge about the professional design community, some significant correlations seem to appear.

The associations experiencing significant growth seem to adhere to one or more out of the following three factors:

- Movement from strictly representing design professionals to representing a range of players in the design community – as individuals as well as other legal entities; designers, design institutions, design driven companies and organisations as well as other design related professionals.

- Clearly identifiable and communicated objectives, strong focus on members’ needs and on measurable deliverables, as well as respect for “what’s in it for me” as a vital and legitimate motive for membership.

- Most organisations experiencing growth have been through a transformation from being a “traditional” membership association with networking activities as a core and life-long memberships as a given to market oriented and pragmatic organisations with increased focus on arguing the value of design as a professional service, on enhancing the business capabilities of the design community and on building bridges between the professional design community and other vital players upstream as well as downstream in the value chain that design is part of.

As for the associations experiencing significant decline, the following three factors seem to unite:

- Hit by the crisis; As most professional designers' associations in Europe are financially vulnerable, highly dependent on a stable flow of membership fees and / or other sources of income, such as government grants, the crisis which hit Europe almost 10 years ago had deep and for some organisations almost fatal impact. Most organisations faced membership decline, as many members struggled to survive and cut “luxuries” like membership fees in their own budgets, while public spending was subject to scrutiny and austerity measures. Some associations still suffer from this and not all members of BEDA have yet recovered fully.

- Coming across as a “nice to have” rather than a “need to have” challenges many associations. As opposed to architects and a number of other professionals, the professional role and title of a designer does not enjoy any protection. In combination with design being embraced and offered as a service by other professional communities and professionals, in many countries, design and design practitioners
see their previous identities being severely challenged. Where the national design associations have had the resources to pick up on this challenge, both in terms of communication activities, strategic shifts and new partnerships, we see stability and growth. On the contrary, in many of the countries where design as a profession and community struggled to position themselves already within this development, and where the professional communities often were based primarily on voluntary work, decline seems to be a natural consequence.

- Those organisations that have not been able to add a level of depth to their services, which cannot be replaced by freely and easily available sources on the internet have a challenge. Both with regard to networking and sharing of information and inspiration, there are countless communities out there – from LinkedIn and Facebook groups to dedicated fora for design at large and any conceivable variation or specialty underneath. In particular for individual members, such free alternatives to a paid membership can be interesting when times are tough. Thus, a transversal challenge for professional design associations is to identify unique propositions, which justify the membership fee as opposed counting on members’ loyalty, often vested in what design once used to be.

EPILOGUE

The survey in general shows a quite diverse field of associations, where one half is “hanging in there”, while the other half is experiencing either significant growth or significant decline. Around half of the respondents have a positive outlook on the future, foreseeing growth in both membership and revenue, while the other half is less optimistic. A majority of the respondents believe that the key to survival and possibly also growth is an increased focus on measurable deliverables – balancing short-term, tangible benefits for the individual member and longer-term effects on the design profession and industry as such. The key to strengthening the community of professional design associations may seem to be found in engaging in an outreach to and in delivering value to the entire design value-chain, while still representing and advocating the role and identity of professional design practitioners. However, these are challenged and destined to continue to change, no matter what. Thus, the primary role of professional design associations in the years to come might be to influence and play a lead role in this inevitable process of change and development, and to engage their members in proving the difference made by, the value delivered by and the uniqueness and appropriateness of design – not only as a tool and a mind-set, a buzzword and a theoretical phenomenon, but as a professional activity in its own right.

BEDA’s potential role in supporting their professional members at doing so should not be underestimated.