



2019 Member Value Study

Key Research Findings – AWWA Nebraska

Prepared by
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Introduction and Methodology

The American Water Works Association (AWWA) recognizes the critical role that its stakeholders play in providing total water solutions and assuring the effective management of water. To ensure the Association continues to provide value to the full spectrum of the water community, AWWA retained McKinley Advisors to conduct research to help the Association better understand how well it's serving the needs of water supply professionals and how it can ensure ongoing value. This survey captured the perceptions, challenges, and needs of AWWA's diverse stakeholders, including: public water and wastewater systems, environmental advocates, scientists, academicians, and others who hold a genuine interest in water.

The project included an electronic survey that was distributed to 72,433 AWWA contacts and was fielded over a period of 40 days between November 29, 2018 and January 7, 2019. In total, 5,735 completed and partially completed¹ survey questionnaires were submitted online for a response rate of 8%. This response rate is typical for opinion research and the number of responses allowed McKinley to apply accurate segmentation analysis to the data.

The following report summarizes key findings from the survey for AWWA Nebraska and focuses on important data that will give valuable insight as AWWA seeks to better serve stakeholders in this Section. The report includes data from the AWWA Nebraska Section:²

AWWA Nebraska Response Data

AWWA Section	Number of Responses
Nebraska	31

As a note, sample sizes will vary throughout the report due to survey logic (i.e., not all questions were delivered to all respondents) and partially completed survey entries. Responses may not sum to 100% due to rounding or the ability to select more than one option. Data in this report is representative of members from the AWWA Section outlined above. In some cases, response numbers may be lower for less populous Sections.

¹ Respondents were counted as "partial" if they did not reach the end of the survey and submit their final answers.

² A full listing of AWWA Sections and Regions can be found in the appendix.

Key Survey Findings

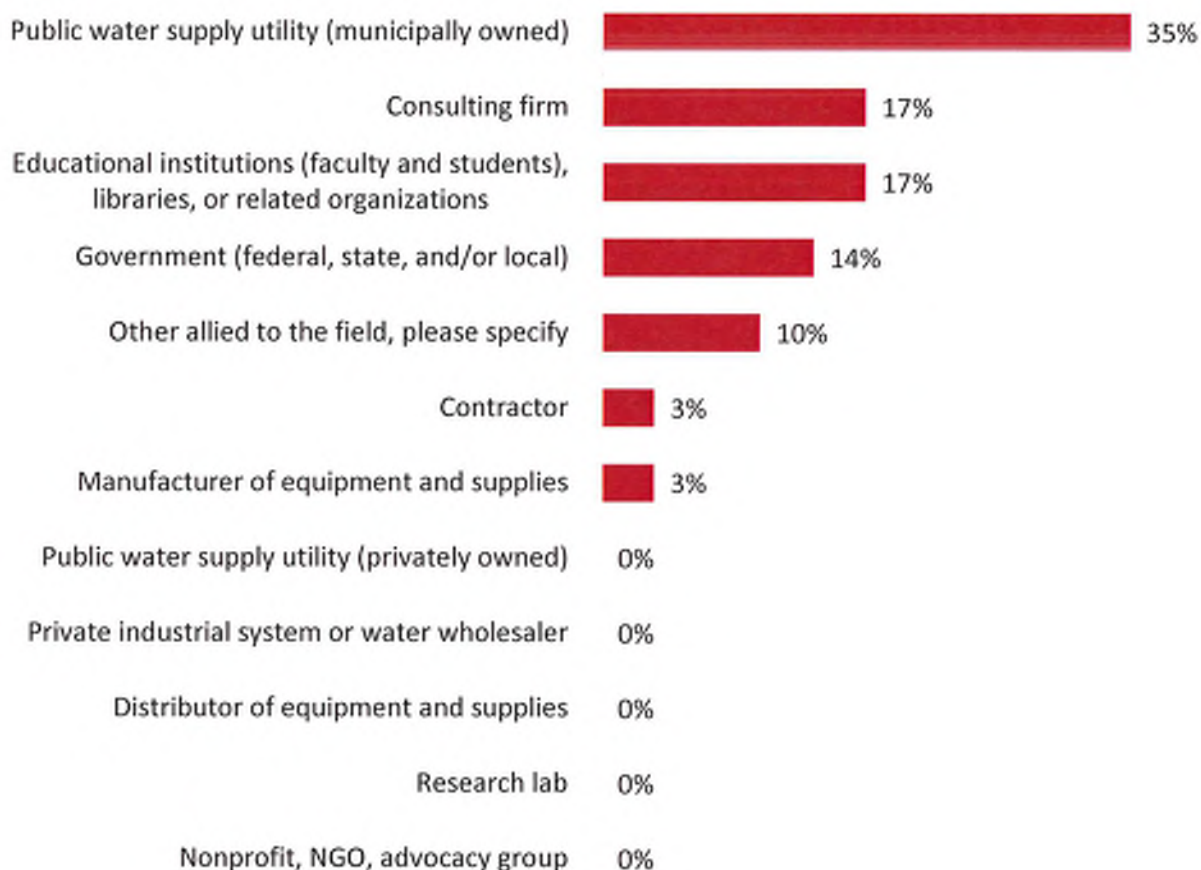
RESPONDENT BACKGROUND

The following section includes background information on survey respondents to provide a frame of reference for which to review the key survey findings. Additional demographics to supplement AWWA's understanding of survey participants may be found on page 21 of this report.

Respondents were asked to indicate the type of organization where they are employed, and most survey respondents noted they work at a municipally owned public water supply utility (35%). This was followed by 17% of respondents who indicated they work at a consulting firm and another 17% who indicated they work at education institutions (faculty and students), libraries, or related organizations.

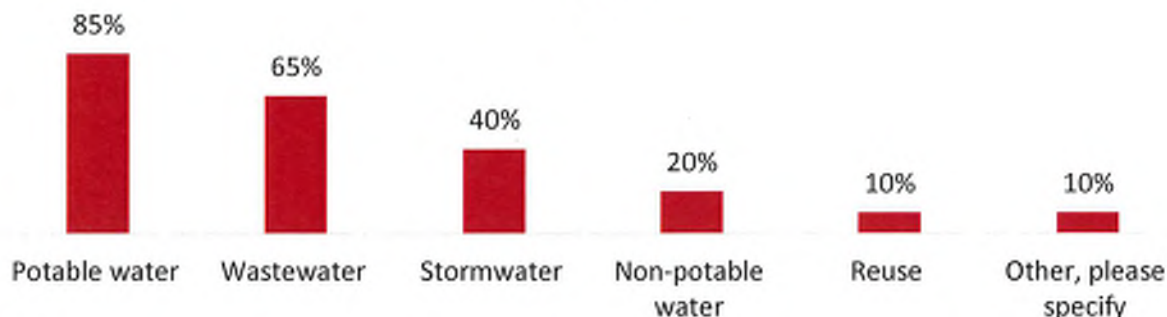
Which of the following best describes your organization?

N = 29



In addition to information on the type of organization where respondents are employed, survey participants were asked to select all principle business activities or fields served by their organization. The vast majority of survey respondents (85%) reported that potable water is the primary field served or principle business activity, followed by a slight majority (65%) who indicated a focus on wastewater.

Which of the following activities best describes the field served/principle business activity of your organization? Please select all that apply.
N = 20

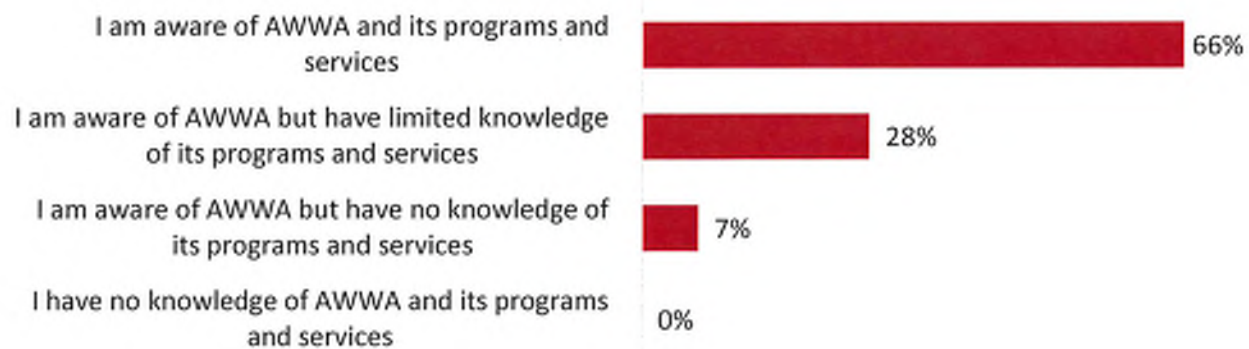


This question was only shown to respondents who selected Public water supply utility (municipally owned), Public water supply utility (privately owned), Government (federal, state, and/or local), Consulting firm, Contractor, or Private industrial system or water wholesaler.

AWWA AWARENESS AND PERCEPTIONS OF AWWA

When asked to describe their awareness of AWWA before participating in the survey, most participants (66%) stated that they are aware of AWWA and its programs and services, followed by 28% who reported being aware of AWWA but only having some knowledge of its programs and services.

Before participating in this survey, how would you describe your awareness of AWWA?
N = 29

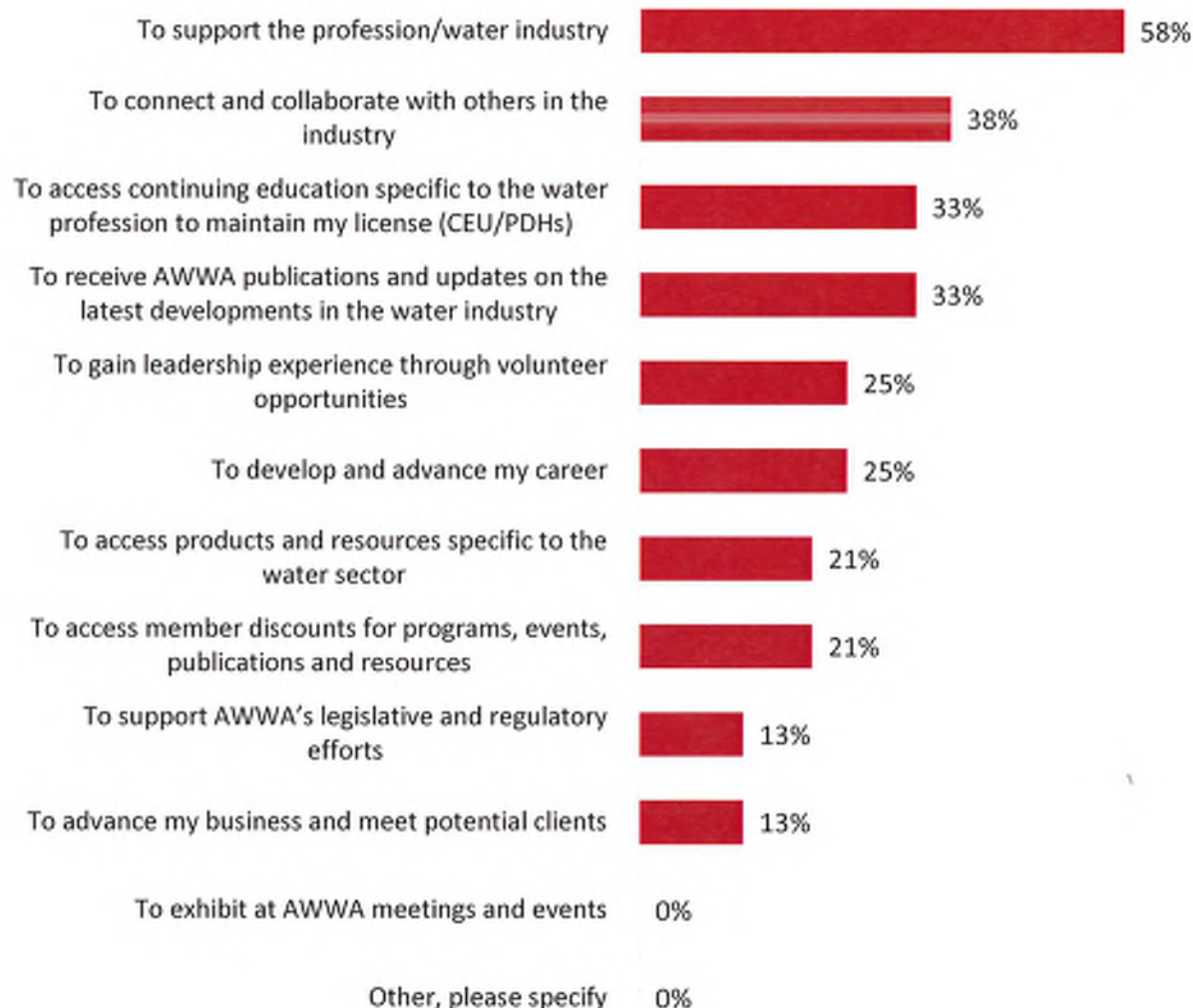


When current AWWA members were asked to select their primary reasons for joining the Association, over half of respondents (58%) reported joining AWWA to support the profession/water industry. Respondents also noted the ability to connect and collaborate with others in the industry (38%), to access continuing education specific to the water profession to maintain their license (CEU/PDHs) (33%) and to receive AWWA publications and latest updates on developments in the water industry (33%). No respondents reported joining to exhibit at AWWA meetings and events (0%) and few noted supporting AWWA's legislative and regulatory efforts (13%) or advancing business and meeting potential clients (13%). Although not the top reasons for joining, these are important aspects of association membership and particularly important to certain segments within AWWA's membership.

What are the primary reasons you are a member of AWWA?

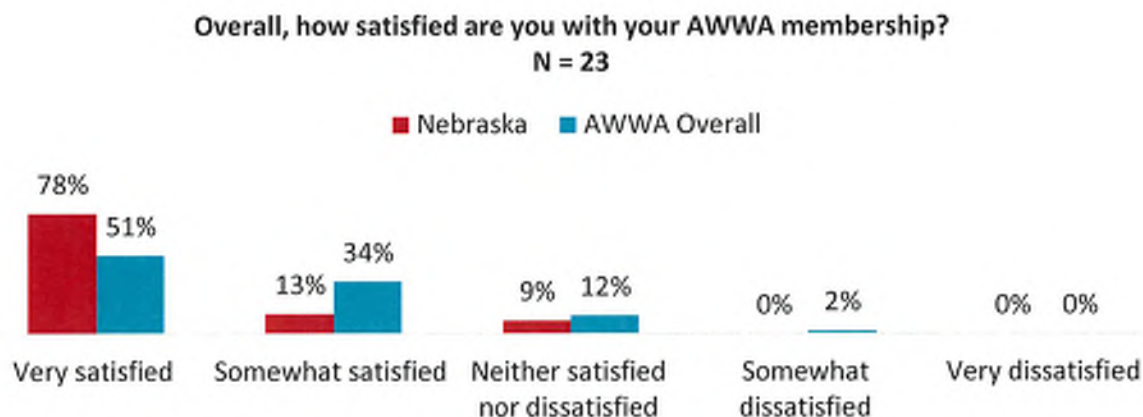
Please select up to three reasons.

N = 24



This question was only shown to AWWA members.

Members reported high levels of satisfaction with AWWA membership. When asked to evaluate their satisfaction with their membership, the overwhelming majority of AWWA members (91%) indicated that they are satisfied, including 78% who noted that they are very satisfied. Zero Nebraska Section respondents expressed dissatisfaction with AWWA.



This question was only shown to AWWA members.

How does Nebraska compare?

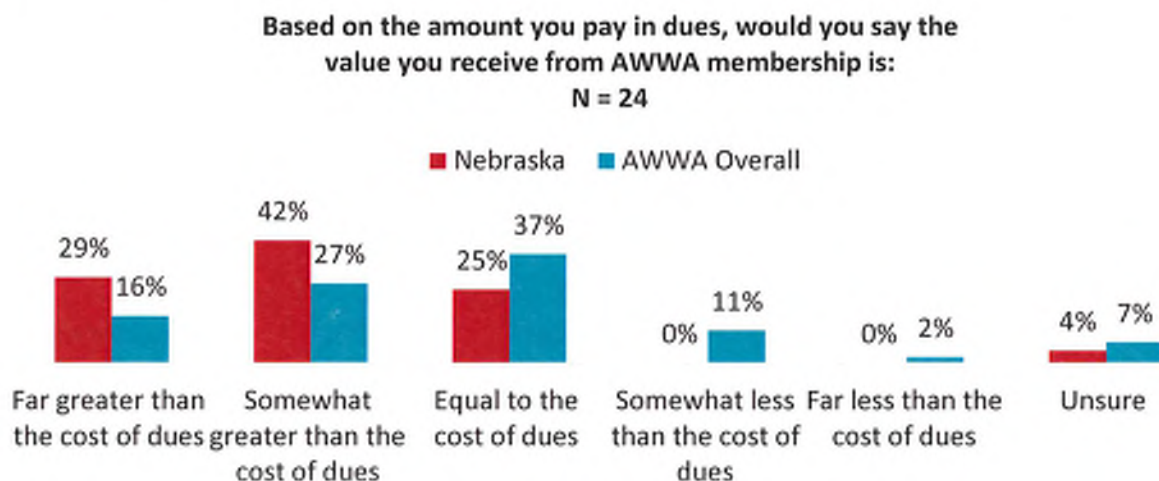
Benchmarking Membership Satisfaction

When compared to the overall membership satisfaction score for AWWA and Region III, Nebraska satisfaction levels are higher.

- 91% - AWWA membership satisfaction for Nebraska
 - 78%: Very satisfied
 - 13%: Somewhat satisfied
- 89% - AWWA membership satisfaction for Region III
 - 58%: Very satisfied
 - 31%: Somewhat satisfied
- 85% - Overall AWWA membership satisfaction
 - 51%: Very satisfied
 - 34%: Somewhat satisfied

When compared to other associations for which McKinley has conducted similar research, AWWA is above average. The average for 104 associations is 74% of members who rated their level of satisfaction with their association membership as very or somewhat satisfied. With a total of 85% of all respondents and 91% of respondents from Nebraska indicating the same, AWWA and Nebraska are both above average.

AWWA member respondents were subsequently asked to evaluate the cost of membership as compared to the value they receive. Seventy-one percent of members rated the value of their AWWA membership as being far greater (29%) or somewhat greater (42%) than the cost of membership. Twenty-five percent of members feel that the value of AWWA membership is equal to the cost, while 0% of respondents rated the value of membership as being less than the cost of dues.



This question was only shown to AWWA members.

How does Nebraska compare?

Benchmarking Value to Cost

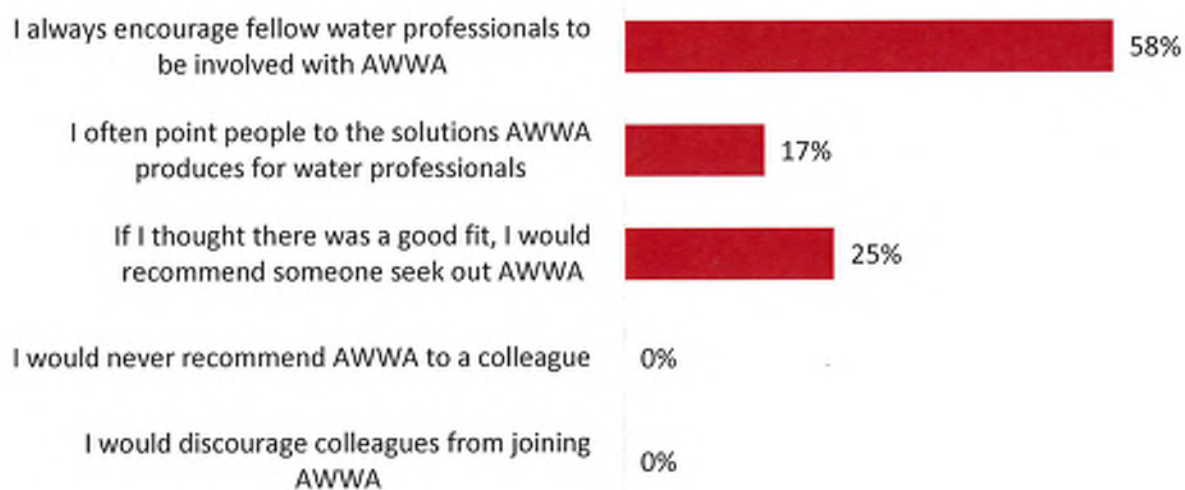
When compared to the overall value to cost score for AWWA membership and Region III, the value of membership compared to the cost for respondents from Nebraska is significantly higher.

- 71% - Value is greater than the cost of membership for Nebraska
 - 29%: Value of membership is far greater than the cost of dues
 - 42%: Value of membership is somewhat greater than the cost of dues
- 47% - Value is greater than the cost of membership for Region III
 - 20%: Value of membership is far greater than the cost of dues
 - 27%: Value of membership is somewhat greater than the cost of dues
- 43% - Value is greater than the cost of membership for AWWA overall
 - 16%: Value of membership is far greater than the cost of dues
 - 27%: Value of membership is somewhat greater than the cost of dues

The value versus cost question is another common element in member surveys, and McKinley has collected data from 113 other associations to help AWWA benchmark themselves against industry data. The industry average is 32% of all members noting that the value they derive from association membership is greater than the cost of dues. With a total of 43% of all respondents and 71% of respondents from Nebraska indicating the same, AWWA and Nebraska are above average.

To understand the "word on the street" about AWWA, participants were asked how likely they would be to recommend AWWA membership to a colleague. Fifty-eight percent noted they always encourage fellow water professionals to be involved with AWWA, while 17% indicated they often point people to the solutions AWWA produces for water professionals. One-quarter of respondents (25%) reported they would recommend AWWA if they felt it would be a good fit for their colleague, and zero respondents noted they would never recommend AWWA or actively discourage colleagues from joining.

How likely would you be to recommend AWWA membership to a colleague?
N = 24



This question was only shown to AWWA members.

To better understand perceptions of AWWA, participants were presented with a set of statements concerning the Association and asked to indicate the level to which they agree or disagree with each statement. All participants (100%) agreed with the statements that AWWA understands the key legislative and regulatory issues the industry faces and is an effective advocate, AWWA provides solutions to the challenges they face, AWWA anticipates the challenges and trends that will impact the water industry, AWWA promotes a positive image of the water industry, and that they have someone at AWWA to call when they have a question or need. Respondents were less likely to agree that AWWA membership is essential for their work (67%) or that AWWA provides solutions to the challenges their organization faces (63%).

Please rate your level of agreement or disagreement with the following statements.

N = 24

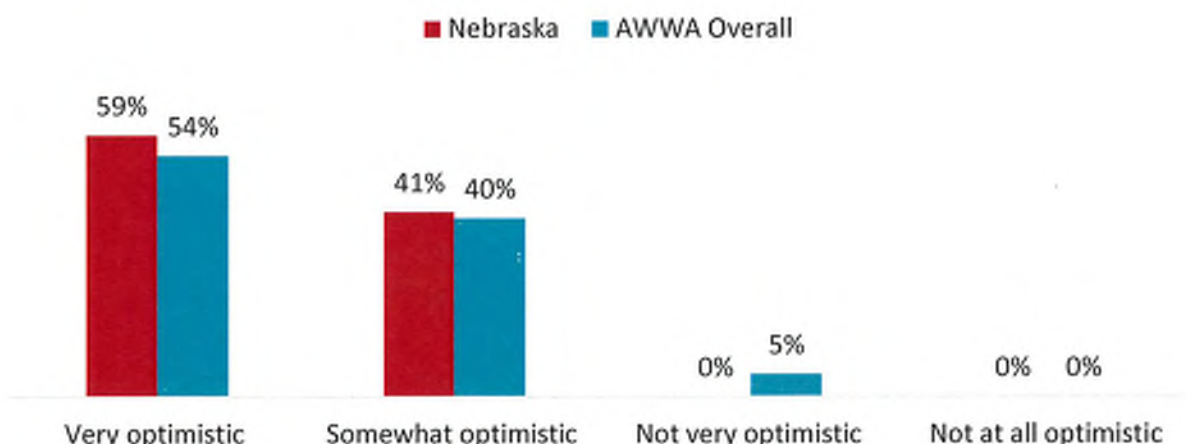
	Agree	Neutral	Disagree	Not applicable
AWWA understands the key legislative and regulatory issues the industry faces and is an effective advocate for the industry	100%	0%	0%	0%
AWWA provides solutions to the challenges I face	100%	0%	0%	0%
AWWA anticipates the challenges and trends that will impact the water industry	100%	0%	0%	0%
AWWA promotes a positive image of the water industry	100%	0%	0%	0%
I have someone at AWWA I can call when I have a question or need	100%	0%	0%	0%
AWWA has made a tangible impact on my professional success/the success of my organization	92%	8%	0%	0%
It's easy to participate in AWWA opportunities and meetings	86%	0%	14%	0%
AWWA is recognized as the international leader for the water industry and I am proud to belong to the association	82%	18%	0%	0%
AWWA is helping to identify, train, and support the next generation of industry leaders	73%	18%	0%	9%
AWWA has been welcoming to me/my organization and represents all members, regardless of focus or size	72%	14%	14%	0%
Membership in AWWA is essential for my work	67%	33%	0%	0%
AWWA provides solutions to the challenges my organization faces	63%	25%	0%	13%

This question was only shown to AWWA members.

INDUSTRY PERCEPTIONS AND CHALLENGES

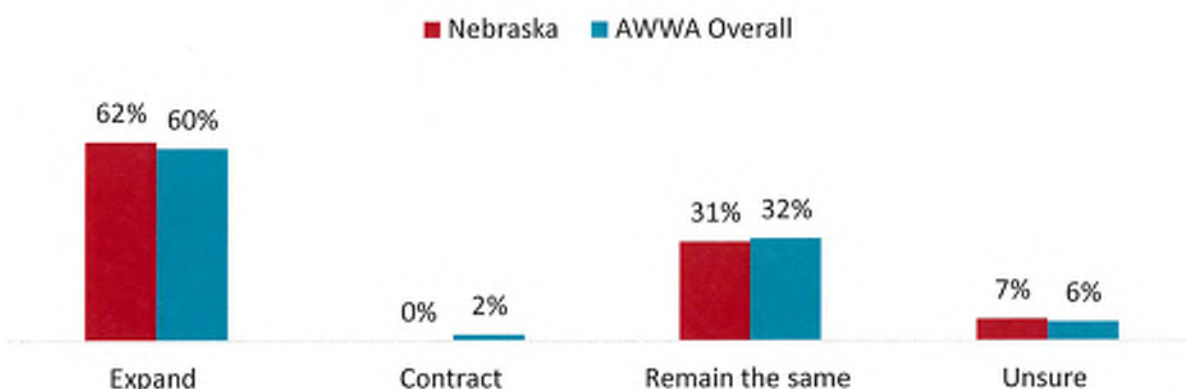
Overall, respondents are optimistic about the future of the water industry. When asked to rate their level of optimism about the future of the industry, 59% of respondents indicated they are very optimistic, followed by 41% who noted they are somewhat optimistic. No respondents reported they are not very optimistic or not at all optimistic for the future of the industry.

Overall, how optimistic are you about the future of the water industry?
N = 29



Just as respondents expressed optimism for the industry as a whole, they also expressed optimism for their individual organizations. Respondents were asked to think about how the scope of their organization's business will change in the next five years. Most of respondents (62%) noted they expect the scope of their business will expand. No respondents believe their businesses will contract, and 31% indicated their business will remain the same (the remaining 7% noted they were unsure).

In the next five years, do you anticipate that your organization's scope of business will:
N = 29



How does Nebraska compare?

Industry Outlook

When compared to the overall level of optimism for all survey respondents and those from Region III, Nebraska participants were relatively in line though there was a slightly higher percentage of respondents who indicated they are very optimistic for the future of the water industry.

- 100% - Total percentage of respondents from Nebraska who indicated they are optimistic about the future of the water industry
 - 59%: Very optimistic
 - 41%: Somewhat optimistic
- 95% - Total percentage of respondents from Region III who indicated they are optimistic about the future of the water industry
 - 52%: Very optimistic
 - 43%: Somewhat optimistic
- 94% - Overall percentage of respondents who indicated they are optimistic about the future of the water industry
 - 54%: Very optimistic
 - 40%: Somewhat optimistic

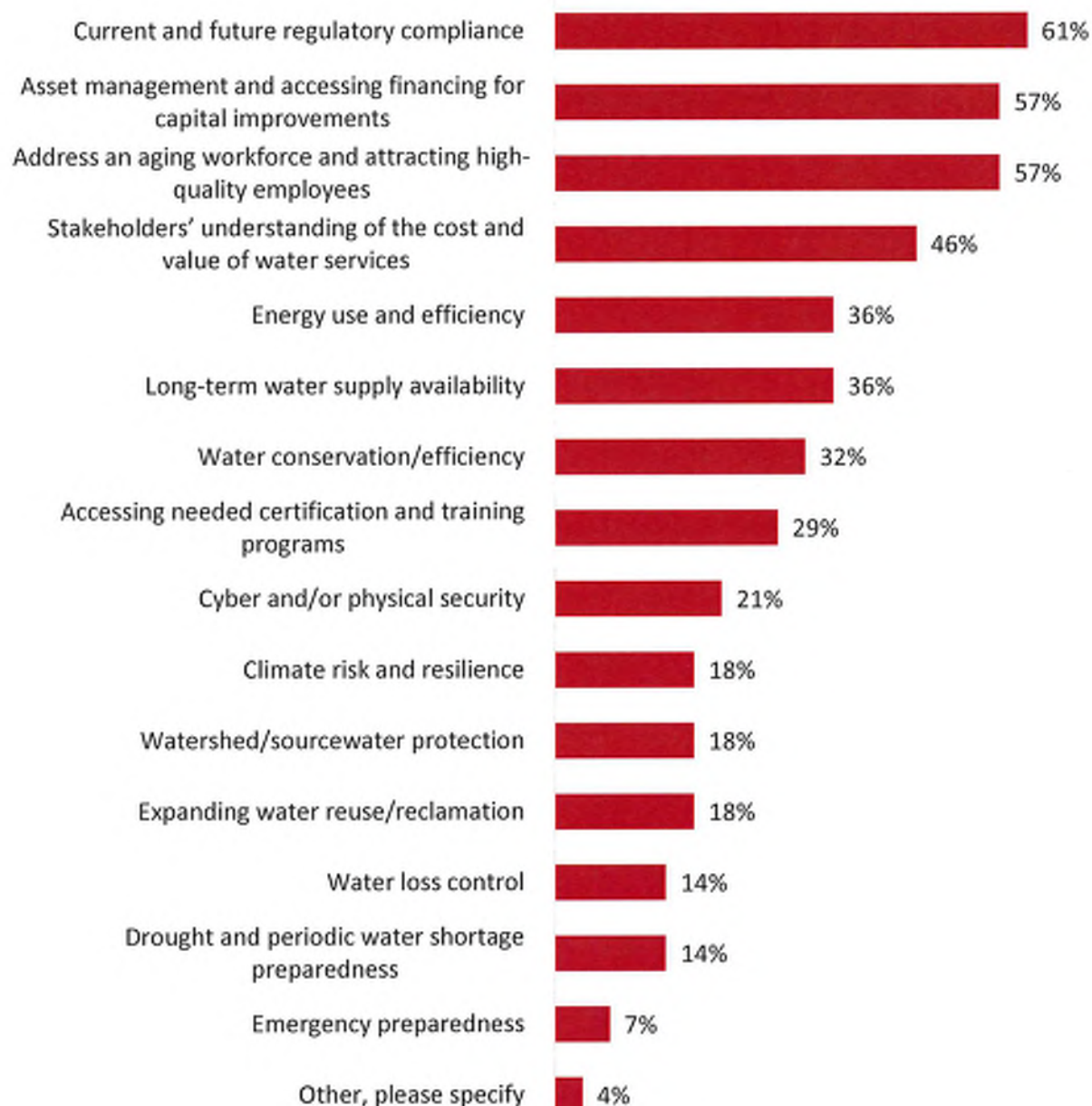
Respondents from Nebraska were more likely to indicate that their business will grow in the next five years when compared to all survey respondents and those from Region III.

- 62% - Total percentage of respondents from Nebraska who reported they expect their organization's scope of business will expand in the next five years
- 55% - Total percentage of respondents from Region III who reported they expect their organization's scope of business will expand in the next five years
- 60% - Overall percentage of respondents who expect a growth in business

Since challenges often correlate directly with an individual or organization's needs, survey respondents were asked to indicate the most pressing challenges they or their organization currently face in the water industry. The top trends and challenges selected by respondents are current and future regulatory compliance (61%), asset management and accessing financing for capital improvements (57%), and an aging workforce and attracting high-quality employees (57%).

What are the top five challenges you/your organization currently face in the water industry?

N = 28

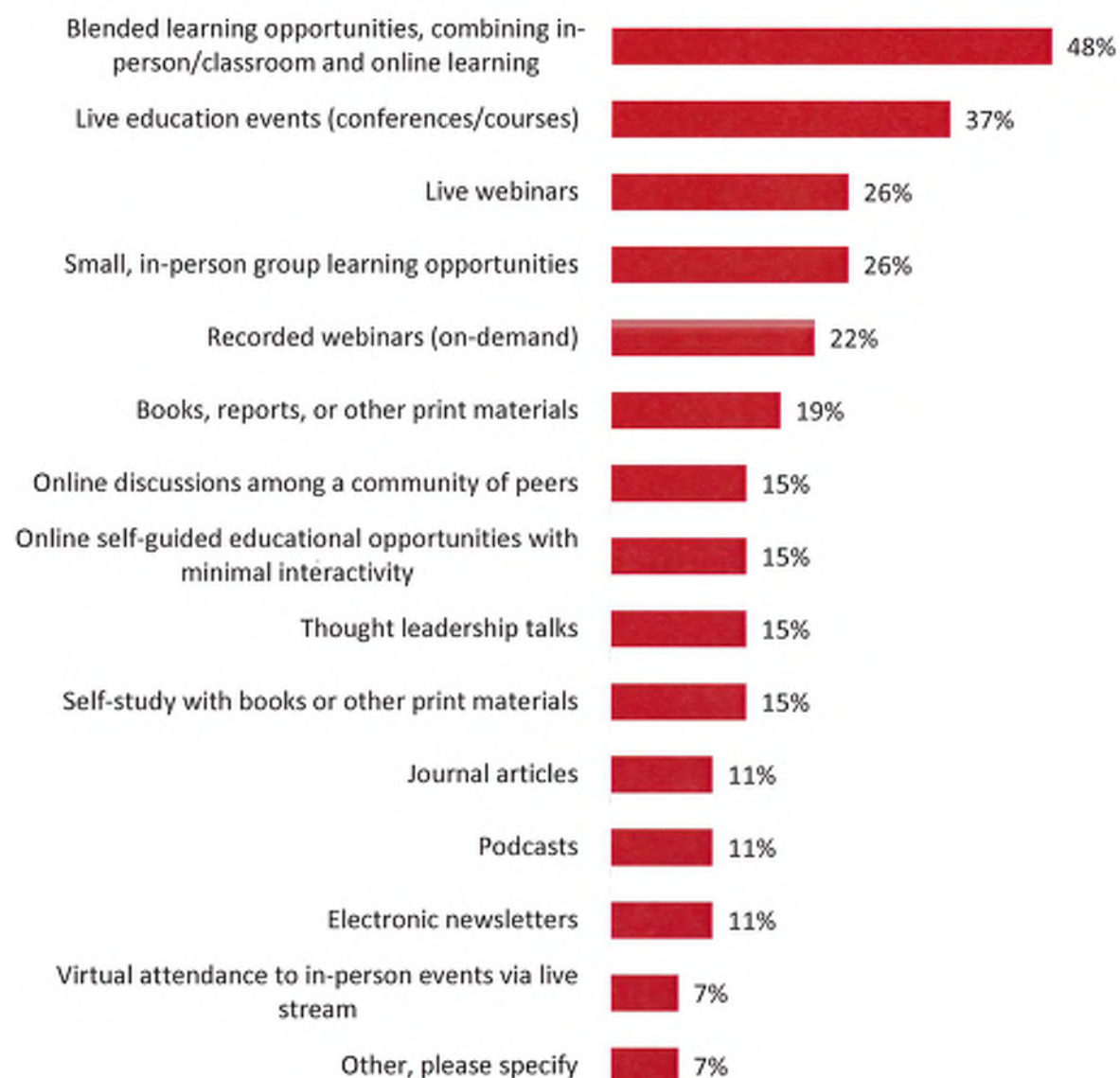


Respondents were then provided with an opportunity to indicate ideas for resources that would help them better address the challenges they face. Forty-eight percent suggested blended learning opportunities combining in-person/classroom and online learning, followed by live education events (conferences/courses) (37%), live webinars (26%), and small, in-person group learning opportunities (26%).

How could AWWA help you better address these challenges?

Please select up to three options.

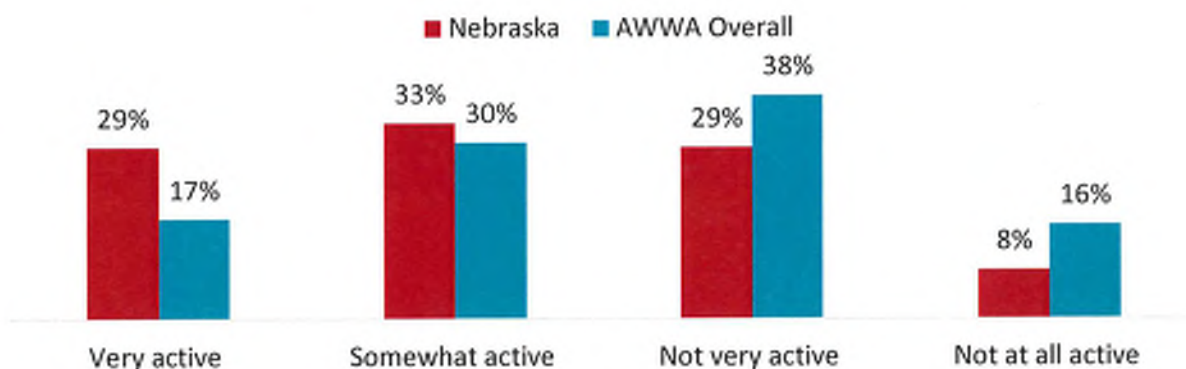
N = 27



SECTION PERCEPTIONS AND EXPERIENCE

Given that the member experience is also shaped at the local level, the survey explored participants' perceptions of and experiences with their AWWA Section. When asked to indicate their level of activity within their local section, 29% of respondents noted they are very active, followed by 33% who indicated they are somewhat active. Over one-third of respondents (37%) reported low levels of activity within their local Section, with 29% noting they are not very active and 8% indicating they are not at all active in their local Section.

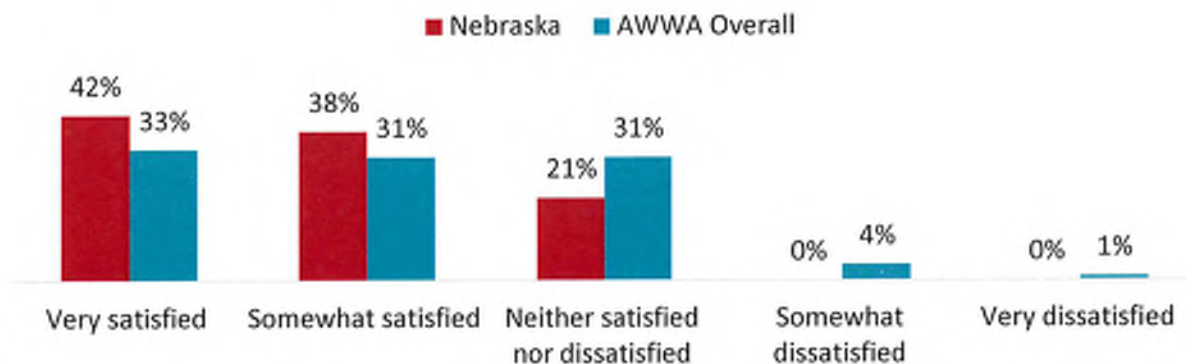
How would you describe your level of activity with your local Section?
N = 24



This question was only shown to AWWA members in North America.

In addition to exploring satisfaction with their overall AWWA membership, respondents were asked to evaluate their satisfaction with their local Section. The majority of respondents (80%) indicated they are satisfied, including 42% who are very satisfied. Zero respondents expressed dissatisfaction with their local AWWA Section, while one-fifth of survey participants (21%) noted they are neither satisfied nor dissatisfied with their local AWWA Section membership.

Overall, how satisfied are you with your local Section membership?
N = 24



This question was only shown to AWWA members in North America.

How does Nebraska compare?

Section Perceptions and Experience

Nebraska benefits from higher Section engagement when compared to the overall responses and those from Region III

- 62% - Percentage of respondents from Nebraska who indicated active engagement in their local AWWA Section
 - 29%: Very active
 - 33%: Somewhat active
- 49% - Percentage of respondents from Region III who indicated active engagement in their local AWWA Section
 - 20%: Very active
 - 29%: Somewhat active
- 47% - Percentage of total respondents who indicated active engagement in their local AWWA Section
 - 17%: Very active
 - 30%: Somewhat active

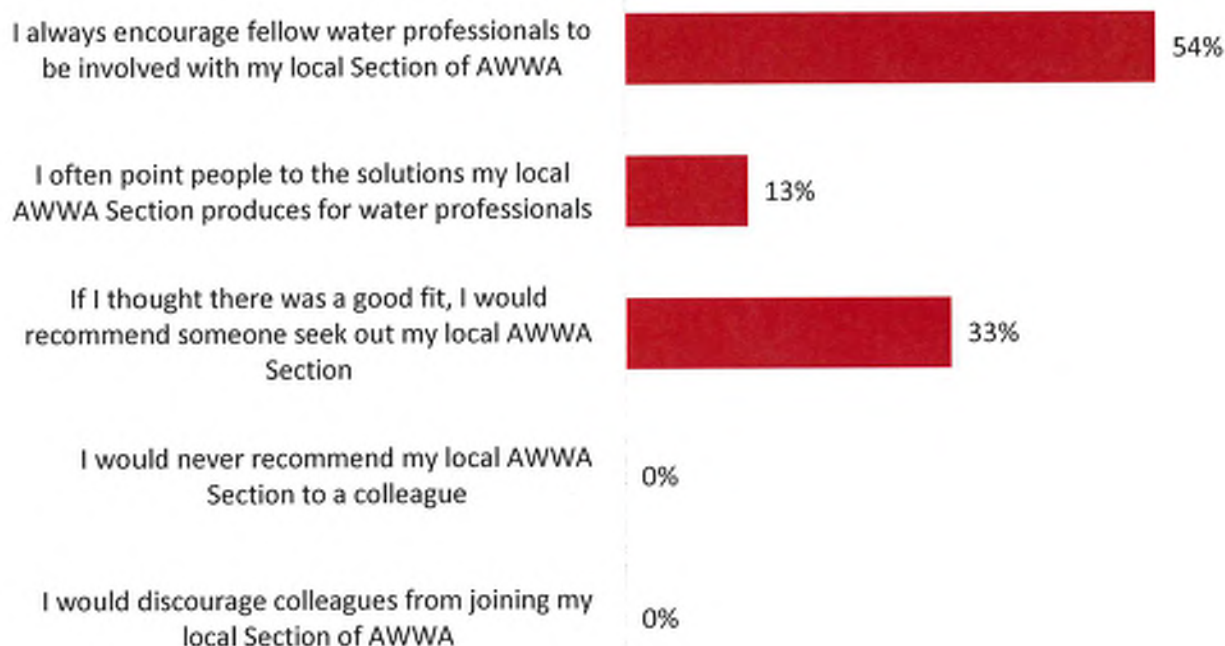
Further, Nebraska has higher satisfaction with Section membership when compared to the overall AWWA average and the average for Region III.

- 80% - Section membership satisfaction for Nebraska
 - 42%: Very satisfied
 - 38%: Somewhat satisfied
- 71% - Section membership satisfaction for Region III
 - 40%: Very satisfied
 - 31%: Somewhat satisfied
- 64% - Overall AWWA membership satisfaction
 - 33%: Very satisfied
 - 31%: Somewhat satisfied

Participants were also asked to indicate how likely they would be to recommend their local AWWA Section to a colleague. Fifty-four percent noted they always encourage fellow water professionals to be involved with their local Section, while 13% indicated they often point people to the solutions their local Section produces for water professionals. One-third of respondents (33%) reported they would recommend their local Section if they felt it would be a good fit for their colleague, and zero respondents noted they would never recommend their local Section or actively discourage colleagues from joining.

How likely would you be to recommend your local Section to a colleague?

N = 24

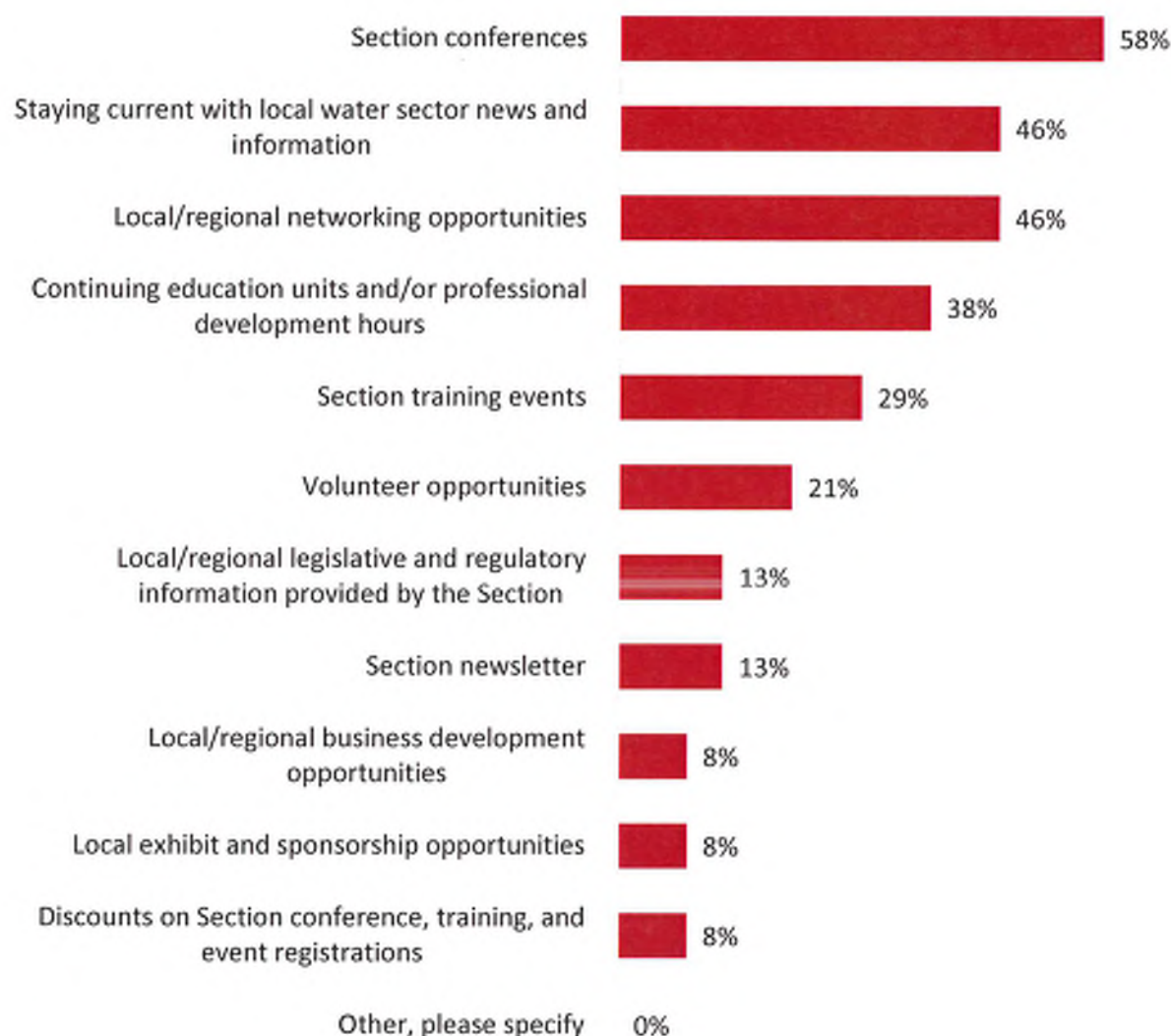


This question was only shown to AWWA members in North America.

To better understand the value that local Section membership provides, respondents were asked to select the top three most valuable benefits of Section membership. Fifty-eight percent of participants noted they value the Section conferences. This was followed by staying current with local water sector news and information (46%), the local/regional networking opportunities afforded by Section membership (46%) and engaging with continuing education units and/or professional development hours (38%).

What are the three most valuable benefits of Section membership?

N = 24



This question was only shown to AWWA members in North America.

Finally, to assess the relative value of AWWA membership and Section membership, respondents were asked to distribute 100 "points" across AWWA and their Section, assigning more points to where they derive more value from their membership experience. For Nebraska, respondents allocated an average of 58.48 points to represent the importance of their Section membership and 41.52 points to represent the importance of their AWWA membership. Overall, respondents allocated an average of 48.56 points to their local Section membership demonstrating that respondents from Nebraska derive more value from their Section membership than average.

Please indicate where you derive the most value from your membership by allocating a total of 100 points between the following areas, assigning more points to the more important areas.

N = 23

	Local Section Membership	AWWA Membership
Nebraska	58.48	41.52
All Respondents	48.56	51.44

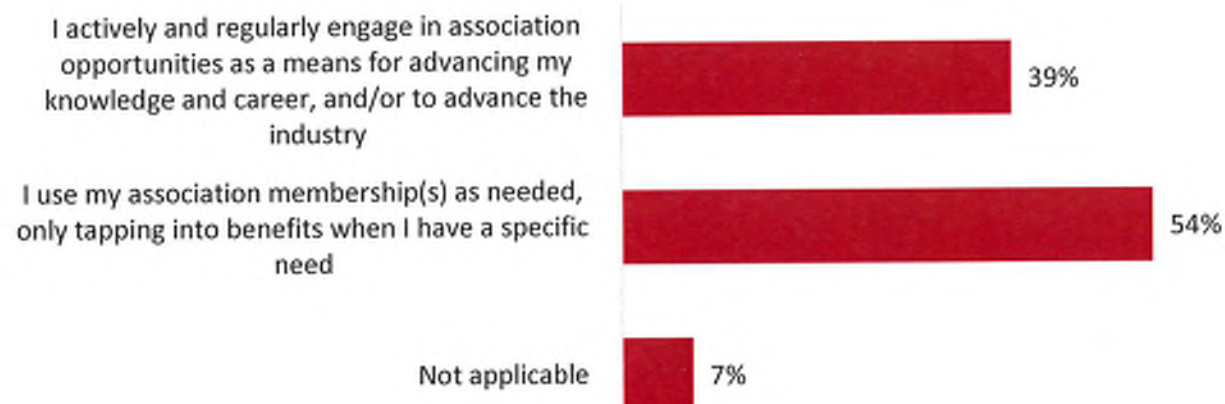
This question was only shown to AWWA members in North America.

PARTICIPATION AND ENGAGEMENT

To better understand how respondents prefer to engage with AWWA, participants were asked a series of questions regarding their engagement habits and preferences. To begin, respondents were asked to select the statement they most agree with when thinking about membership in an association that serves the water sector. Thirty-nine percent noted they actively and regularly engage in association opportunities as a means of advancing their career and/or the industry, while 54% reported they only use their association membership(s) as needed, tapping into benefits when there is a specific need.

Which statement do you most agree with when thinking about your membership in an association that serves the water sector?

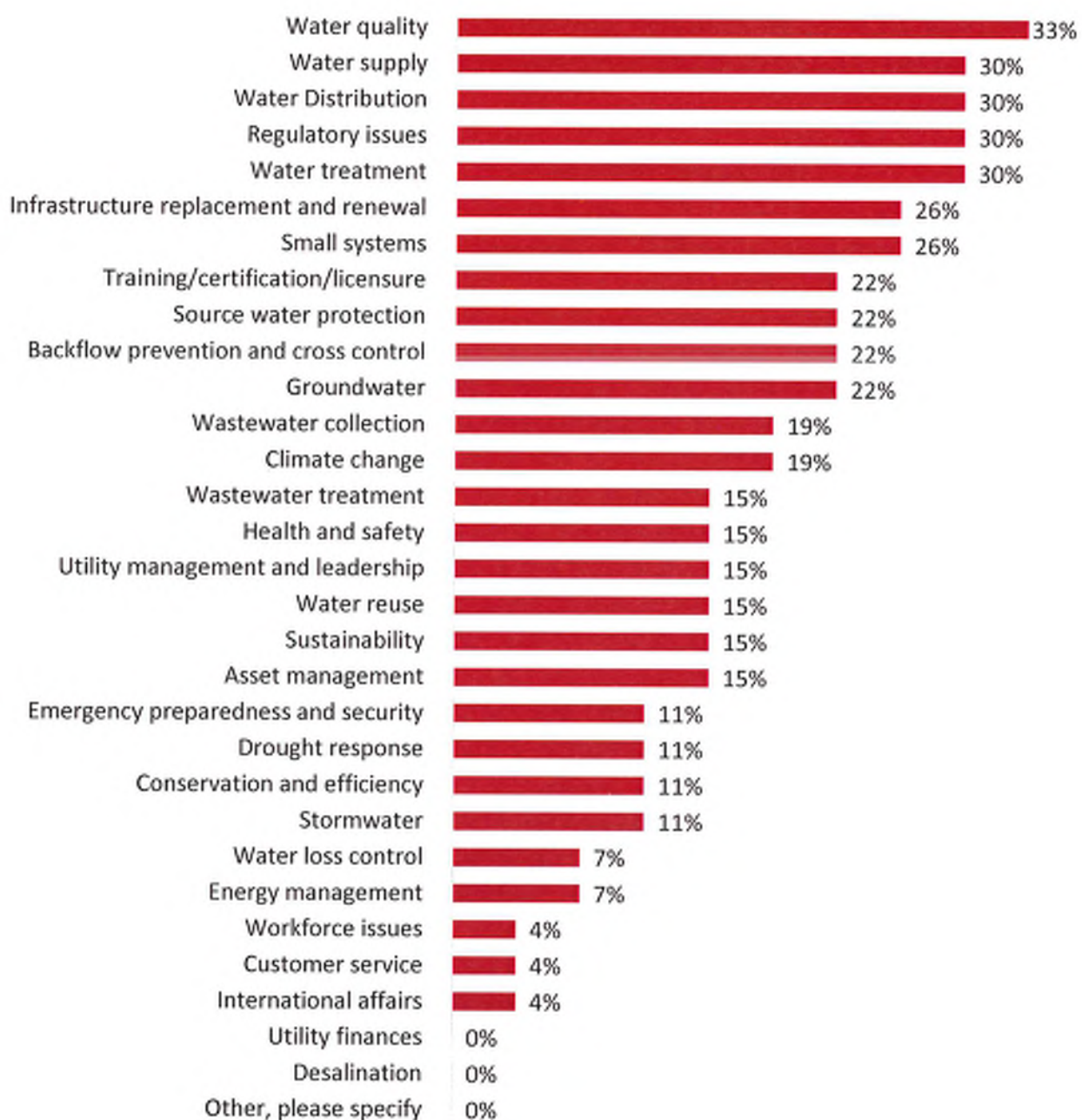
N = 28



To provide direction to the development of future communications and educational content, the survey asked respondents to select their top five areas of interest as it relates to the water industry. The top areas of interest are: water quality (33%), water supply (30%), water distribution (30%), regulatory issues (30%), and water treatment (30%).

What are your top five areas of interest? Please select up to five options.

N = 27



RESPONDENT DEMOGRAPHICS

The following section provides additional demographic information for survey respondents. Highlights from this section are included in the graphic below:

Employer Support

- Financial support from respondents' employers for expenses related to AWWA and Nebraska involvement is high in Nebraska. Sixty-four percent of respondents noted their employer covers 100% of costs related to association dues, while 93% noted full coverage of conference/meeting registration.

Number of Service Connections

- The majority of respondents (82%) reported their organization maintains fewer than 50,000 service connections or collection systems connections.

Professional Tenure

- Sixty-nine percent of respondents have worked in the water industry for more than 15 years, while 31% have worked in the industry for 10 or fewer years. Respondents from Nebraska are slightly more tenured than the overall AWWA average. For AWWA overall, 51% have been working in the water industry for more than 15 years, and 36% have been in the industry for 10 or fewer years.

Tenure with AWWA

- Thirty-six percent of participants have been personally involved in AWWA for 10 or fewer years, while 28% have been involved for more than 20 years.

Age

- Forty-four percent of respondents were aged 56 or older, 33% were aged 36 to 55, and 22% were aged 35 or younger.

Education

- Most participants (60%) have at least a bachelor's degree, with 20% holding advanced degrees such as a master's or doctorate.

Race/Ethnicity

- Seventy-eight percent indicated their race or ethnicity as Caucasian/white.

Gender

- Seventy percent indicated their gender as male.

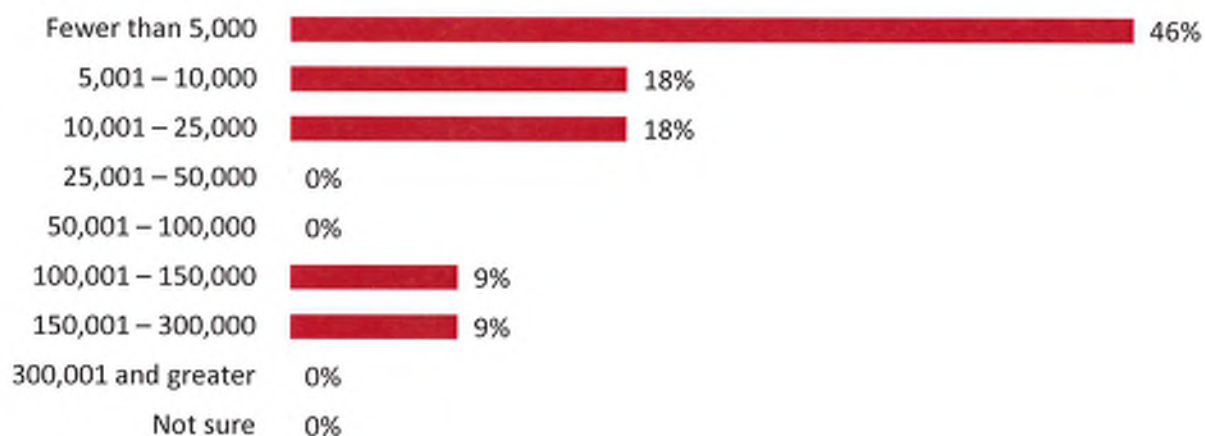
Please specify how each of the following is typically paid.

N = 28

	I pay 100%	My employer pays a percentage and I pay the rest	My employer pays 100%	Not applicable
Association dues	21%	7%	64%	7%
Manuals, handbooks, study guides, training resources	11%	11%	61%	18%
Online education (webinars, etc.)	11%	0%	68%	21%
Conference/meetings registration	4%	0%	93%	4%
Travel for conferences/meetings	4%	7%	86%	4%
Face-to-face education (workshops, etc.)	4%	4%	86%	7%

How many service connections or collection systems connections are maintained by your organization? If your utility uses both water and wastewater, use the number of connections that is greater.

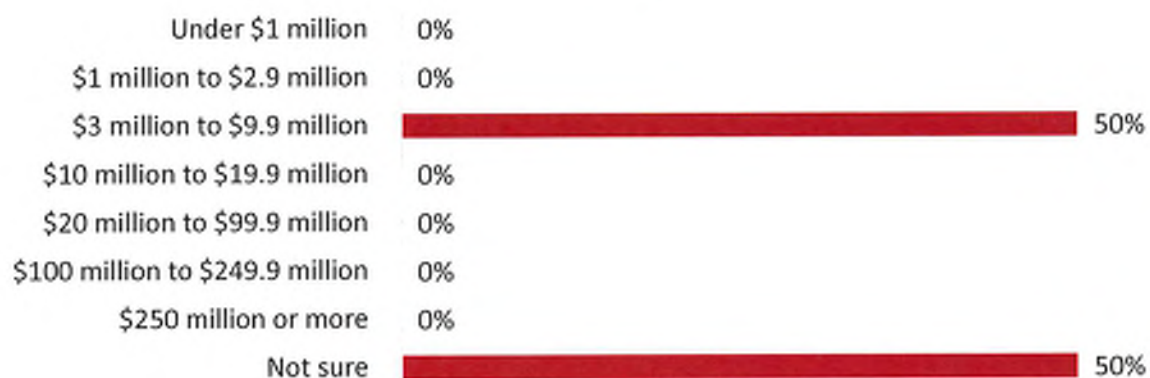
N = 11



This question was only shown to utility respondents.

How much does your organization earn in gross annual sales to the water supply industry?

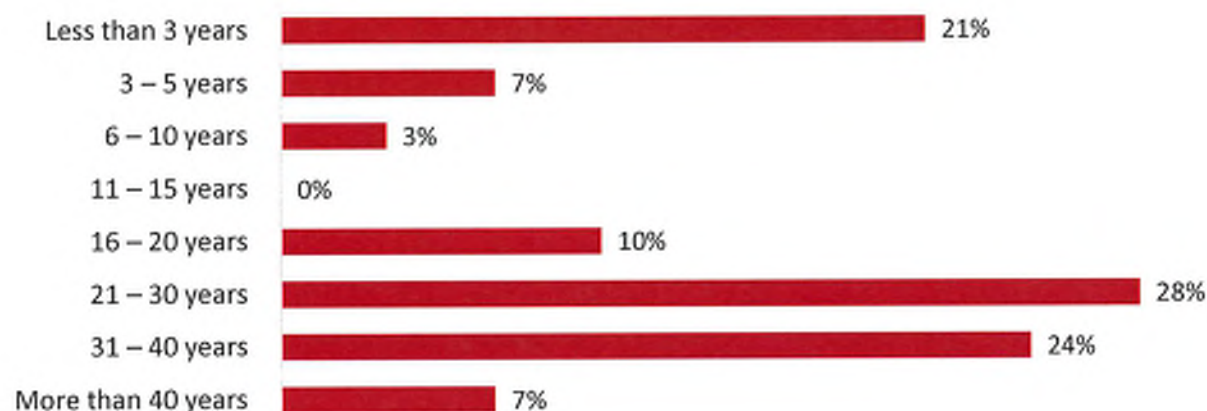
N = 2



This question was only shown to service provider respondents.

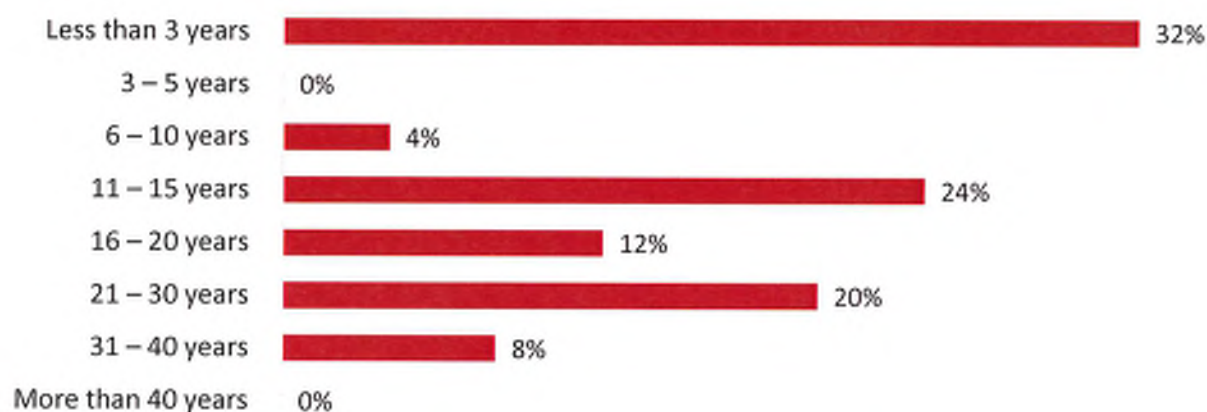
How long have you been working in the water industry?

N = 29



How long have you personally been involved with AWWA?

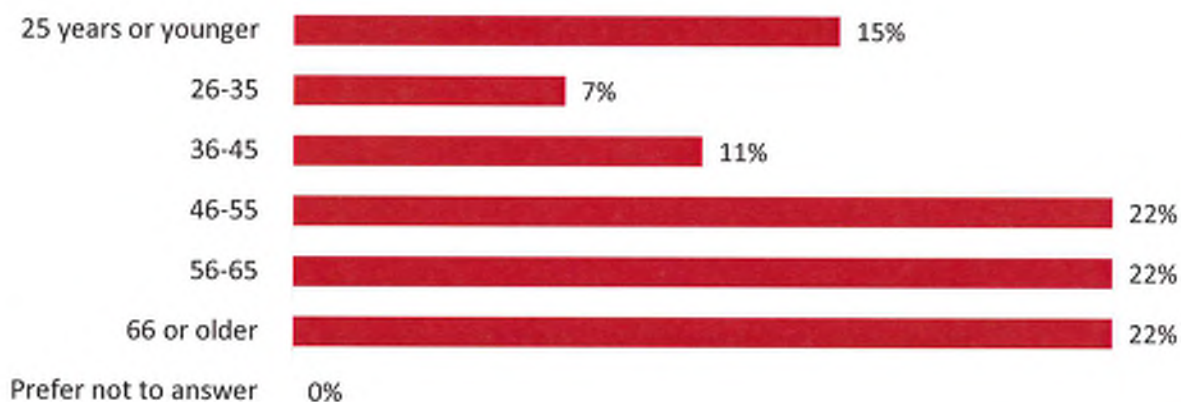
N = 25



This question was only shown to AWWA members.

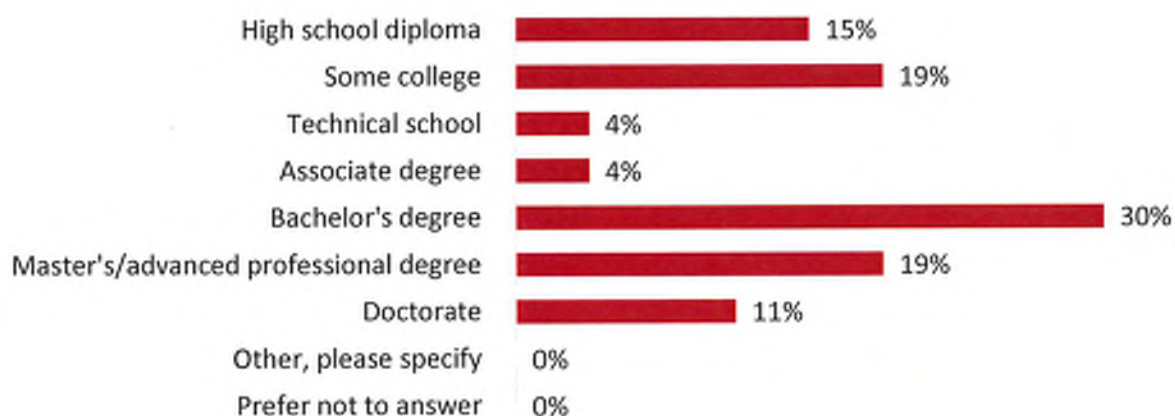
What is your age range?

N = 27



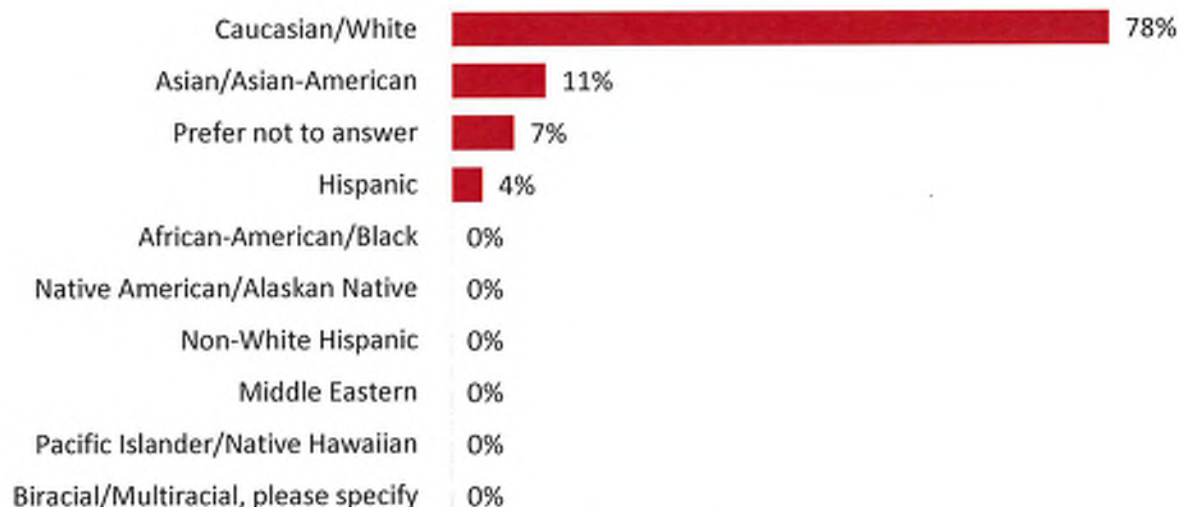
Please indicate the highest level of education you have obtained:

N = 27



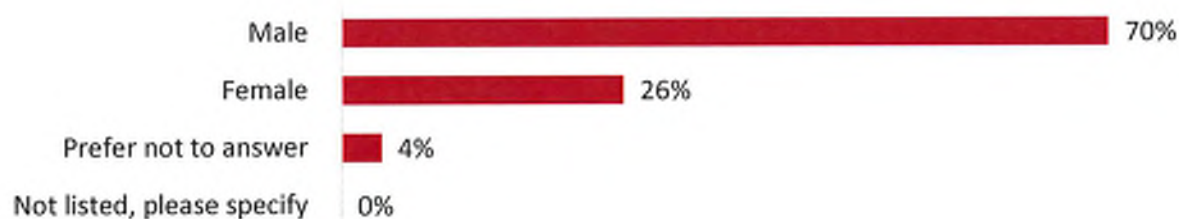
Please indicate the race or ethnicity with which you most closely identify:

N = 27



Please select the gender with which you most closely identify:

N = 27



Appendix

AWWA SECTIONS

Section	Included States/Territories/Provinces
Alabama-Mississippi	Alabama, Mississippi
Alaska	Alaska
Arizona	Arizona
Atlantic Canada	New Brunswick, Newfoundland and Labrador, Nova Scotia, Prince Edward Island
British Columbia	British Columbia
California-Nevada	California, Nevada
Chesapeake	Delaware, Maryland, Washington, DC
Connecticut	Connecticut
Florida	Florida
Georgia	Georgia
Hawaii	American Samoa, Guam, Hawaii, Northern Mariana Islands
Illinois	Illinois
Indiana	Indiana
Intermountain	Eastern Idaho, Utah
Iowa	Iowa
Kansas	Kansas
Kentucky-Tennessee	Kentucky, Tennessee
Mexico	Mexico
Michigan	Michigan
Minnesota	Minnesota
Missouri	Missouri
Montana	Montana
Nebraska	Nebraska
New England	Maine, Massachusetts, New Hampshire, Rhode Island, Vermont
New Jersey	New Jersey
New York	New York
North Carolina	North Carolina
North Dakota	North Dakota
Ohio	Ohio
Ontario	Ontario
Pacific Northwest	Oregon, Washington, Western Idaho
Pennsylvania	Pennsylvania
Puerto Rico	Puerto Rico, Virgin Islands
Quebec	Quebec
Rocky Mountain	Colorado, New Mexico, Wyoming
South Carolina	South Carolina
South Dakota	South Dakota
Southwest	Arkansas, Louisiana, Oklahoma
Texas	Texas
Virginia	Virginia
West Virginia	West Virginia
Western Canada	Alberta, Manitoba, Northwest Territories, Saskatchewan
Wisconsin	Wisconsin
International	All countries (ex. Canada and the United States)

AWWA REGIONS

Region	Included Sections
Region I	Atlantic Canada, Chesapeake, Connecticut New England, New Jersey, New York, Pennsylvania, Quebec
Region II	Alabama-Mississippi, Florida, Georgia, Kansas, Kentucky-Tennessee, Missouri, North Carolina, Puerto Rico, South Carolina, Southwest, Virginia, West Virginia
Region III	Illinois, Indiana, Iowa, Michigan, Minnesota, Nebraska, North Dakota, Ohio, Ontario, South Dakota, Wisconsin
Region IV	Alaska, Arizona, British Columbia, California-Nevada, Hawaii, Intermountain, Mexico, Montana, Pacific Northwest, Rocky Mountain, Texas, Western Canada