



# 2009 Qualitative Member Research Results

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## Project Objectives

### Conduct telephone interviews with Active, Associate and Sustaining members to examine the needs and aspirations of members

- Provide all members an opportunity to participate in a one-on-one telephone discussion
- Understand industry issues and challenges from the member perspective
- Probe for IBTTA's effectiveness
- Gather input on satisfaction, unmet needs and member expectations of IBTTA

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## Project Methodology

- **Calls were conducted over a seven-week period in 2009 (early-May through mid-June)**
- **All members were contacted at least three times via telephone and email**
- **Members invested significant time in the process and spent 30-45 minutes discussing IBTTA**

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## Response Overview

- **Original objective: 100 completed interviews**
- **Final Results: Interviews conducted with 125 members representing 45% of IBTTA membership**
  - 65 interviews with Active members
    - 25 International / 40 Domestic
  - 60 interviews with Associate and Sustaining members
    - 10 International / 50 Domestic

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## Project Methodology: The Interview

- ***External Investigation: A look at the industry***
  - Critical industry issues affecting members
  - Potential industry changes
  - Resources
  - Technology
- ***Internal Investigation: A look at IBTTA***
  - Benefits & services
  - IBTTA's role as a national and international organization
  - Identifying top priorities and potential barriers to success

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# Key Takeaways



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## **#1 ECONOMIC CONDITIONS WARRANT CHANGES**

In addition to forcing members to evaluate how transportation projects will be financed going forward, the economic downturn has led to a reduction of expenses and reordering of business priorities at their own organizations. This has resulted in travel restrictions and budget cuts, which have a direct impact on IBTTA. Therefore, *members are looking to IBTTA to respond to current economic conditions by rightsizing the calendar of events to align with the times.*

➤ IBTTA must evaluate which events are critical to its ongoing operation in 2010 and explore new mediums (other than face-to-face events) to enable ongoing information sharing and networking.



## Key Takeaways

### ***#2 MEMBERS SEEK MORE IMPACT FROM IBTTA ADVOCACY***

A decline in Highway Trust Fund revenues, the renewal of Transportation Authorization Bill, a new Administration, and passage of an economic stimulus package with money set aside for infrastructure improvements are all relevant issues for members doing business in the U.S. During this unique moment in time, *participants are looking for more tangible outcomes from IBTTA's advocacy agenda.*

➤ In the current dynamic political landscape, IBTTA must take a more active role in influencing legislation and “driving” the conversation from a position of leadership. However, in order to achieve these outcomes, members will likely have to increase their level of funding to IBTTA through one form or another.



*“What is missing from IBTTA as an industry association is that there doesn’t seem to be leadership in terms of addressing and solving problems that the industry is facing in specific areas such as interoperability which is a national, regional, and intra-state problem. They do provide a forum to discuss these issues, but no real leadership or effort to come up with solutions and carry them forward by lobbying for those solutions with the highway, transportation, and legislatures.”*



## Key Takeaways

### ***#3 PR SOUGHT TO ELEVATE TOLLING AS A SOLUTION***

Participants recognize the good work IBTTA is doing to raise awareness of tolling (e.g., a solution for transportation finance), but they seek continued leadership to raise awareness of the benefits that tolling can bring to the broader transportation debate. Ultimately, participants would love to see IBTTA have additional impact through *broader public relations campaigns that educate the general public and key decision-makers in public agencies about the benefits of tolling.*

➤ Evaluate the relative effectiveness of current PR efforts and media outreach.



## Key Takeaways

### **#4 IBTTA SEEN AS HIGHLY VALUABLE, ON TRACK**

An overwhelming majority of respondents see IBTTA as highly effective in executing on its mission primarily through its information, networking and education products. While these are certainly challenging times and much to confront in the future, *IBTTA has earned a high degree of member loyalty through consistent execution on its key value drivers.*

➤ IBTTA must balance members' calls to consistently innovate with the need to deliver excellent events, meaningful opportunities to network and serve as the primary source of education and information about the tolling industry.



## Key Takeaways

### ***#5 INDUSTRY CHANGES CONTINUE TO CAUSE CONFUSION***

The continued blurring of lines between agency / concessionaire, public / private, and domestic / international members seems to be an issue which is no longer possible to ignore in terms of its impact on IBTTA policies, governance and strategic direction. Indeed, as these trends become more widespread, IBTTA's various constituencies will have different viewpoints on key industry issues. While *respondents see the value in uniting these various segments under the IBTTA umbrella, lingering questions about IBTTA's core constituency and purpose are causing a palpable undercurrent of tension.*

➤ IBTTA should consider revisiting how members are classified given the extensive change that has occurred in the industry.



*“IBTTA needs to clarify the relationships with its North American and international members. This should be on the table as it claims to be international in spirit. There needs to be more transparency and you need to define as much as possible the responsibility and roles of international and domestic members to avoid this debate.”*



*“The divide that could emerge between private and public whose main manifestation is the fact that the association doesn’t clearly identify / distinguish domestic and international. Membership is very much non-representative of the global industry as it is made up of a lot of municipal toll agencies in the US and there are very few toll road operators with private capital. Whereas internationally there are very few state owned companies. These divisions could enhance the confusion.”*



## Key Takeaways

### **#6 TECHNOLOGY WILL CONTINUE TO SHAPE THE INDUSTRY**

Electronic Toll Collection (ETC), Open Road Tolling (ORT), interoperability, technology of enforcement, and satellite based tolling are all major drivers which will advance the industry. Members in the public and private sector must be aware of current innovations within the industry, standards of operation, and best practices to implement and effectively use these technologies. *Given the pace of technological change, IBTTA must be dedicated to technology thought-leadership to help members remain current and knowledgeable about the impact technology has on the industry.*

➤ IBTTA should consider giving more prominence to emerging technologies in its communications and education programs.



## Key Takeaways

### ***#7 WORKFORCE DEVELOPMENT REMAINS A STRATEGIC ISSUE***

Similar to earlier studies McKinley has conducted, respondents are continually challenged by workforce development issues. Succession planning, attracting younger professionals, and finding qualified staff with experience and necessary skills to provide vision for the future of tolling were identified as common challenges. While IBTTA members offer challenging work and good benefits, *for many participants mid-level management with technical skills and project management experience in tolling are hard to find.*

➤ IBTTA should evaluate the impact of its Leadership Academy and consider options to expand its role in attracting and engaging the next generation of industry leaders.



## Key Takeaways

### ***#8 SUSTAINABILITY IS EMERGING AS A CRITICAL ISSUE***

The move toward economic, social and ecological sustainability impacts transportation and urban planning. Toll operators and others in the tolling industry should be part of the debate examining how tolling can be used as an effective management tool to potentially reduce congestion and green house gases. *Participants cited sustainability as a significant development that IBTTA should continue to track and monitor.*

➤ Continue to monitor and educate members and the public on how tolling can become a contributing factor in building a more sustainable infrastructure.



## Key Takeaways

### **#9 ACCESS TO INDUSTRY INFORMATION REMAINS A PRIORITY**

Expectations for IBTTA's Data Warehouse, found on the website, are high. While most see value in the current product, there are many calls for additional best practices, benchmarking data and tolling industry intelligence. *IBTTA is on track with its strategy in this regard, but additional value (both for members and potential customers) can be created through a more robust tool.*

➤ IBTTA should evaluate methods to fast-track its development process and consider ways to continue to populate its databases with relevant information. Also, IBTTA should evaluate ways to further monetize the product with audiences who would benefit from access to key industry data.



# Strategic Implications



## Strategic Issues for Discussion

- A clear theme to emerge in the discussions was a call for increased focus on advocacy. To what extent will members be willing and able to fund an increase of resources in this area, particularly given current economic conditions?
- Some perceive IBTTA as a “North American organization with some International members” rather than a truly global association. Is there a relevant distinction to be made between these positions? What would constitute an initial, but meaningful, step toward becoming a more globally oriented organization? What could IBTTA gain by becoming more global in its outlook and service to members?



## Strategic Issues for Discussion

- Individuals are learning and interacting in entirely new ways. Does IBTTA have adequate resources in place to fully capitalize on new technologies to bring these lower-cost opportunities to members?
- There are a host of competing priorities that will likely demand more resources. Expanding efforts in advocacy, public relations, and education will all require new sources of funding. What initiatives can IBTTA prioritize that would tap into new markets and/or revenue streams to help provide the required capital for these opportunities?

