



AASV Membership Needs

Quantitative Research Study

September 2014

MARKETSENSE INC.

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Objectives & Methodology

Objectives

Key Objectives

Assess AASV members' perceptions of the organization and the services/programs that it provides.

Assess member attitudes toward proposed changes/enhancements in AASV programming.

Identify opportunities for new programming/services that members feel AASV should offer in the future.

Establish AASV members' key issues & needs in their businesses.

Sub-Objectives

- Determine the degree of alignment between member needs and AASV programming/services.
- Identify areas for improvement.
- Separate the most critical of these from those that are less critical.
- Specifically adding staff and programming to focus on emerging diseases, using the "PEDV model" for addressing future critical disease or production issues.

Methodology

Data Collection Method

- 15 minute web-based survey designed by MarketSense.
- Survey was launched via email sent from AASV with 3 follow-up reminders to complete survey.
- Data returned to MarketSense.
- MarketSense completed this pro-bono for AASV.
- T-tests were performed on means at the 95% confidence level for Q1,3,5,6,11,13
- Maximum sample error yield was +/-6% at 95% confidence interval.

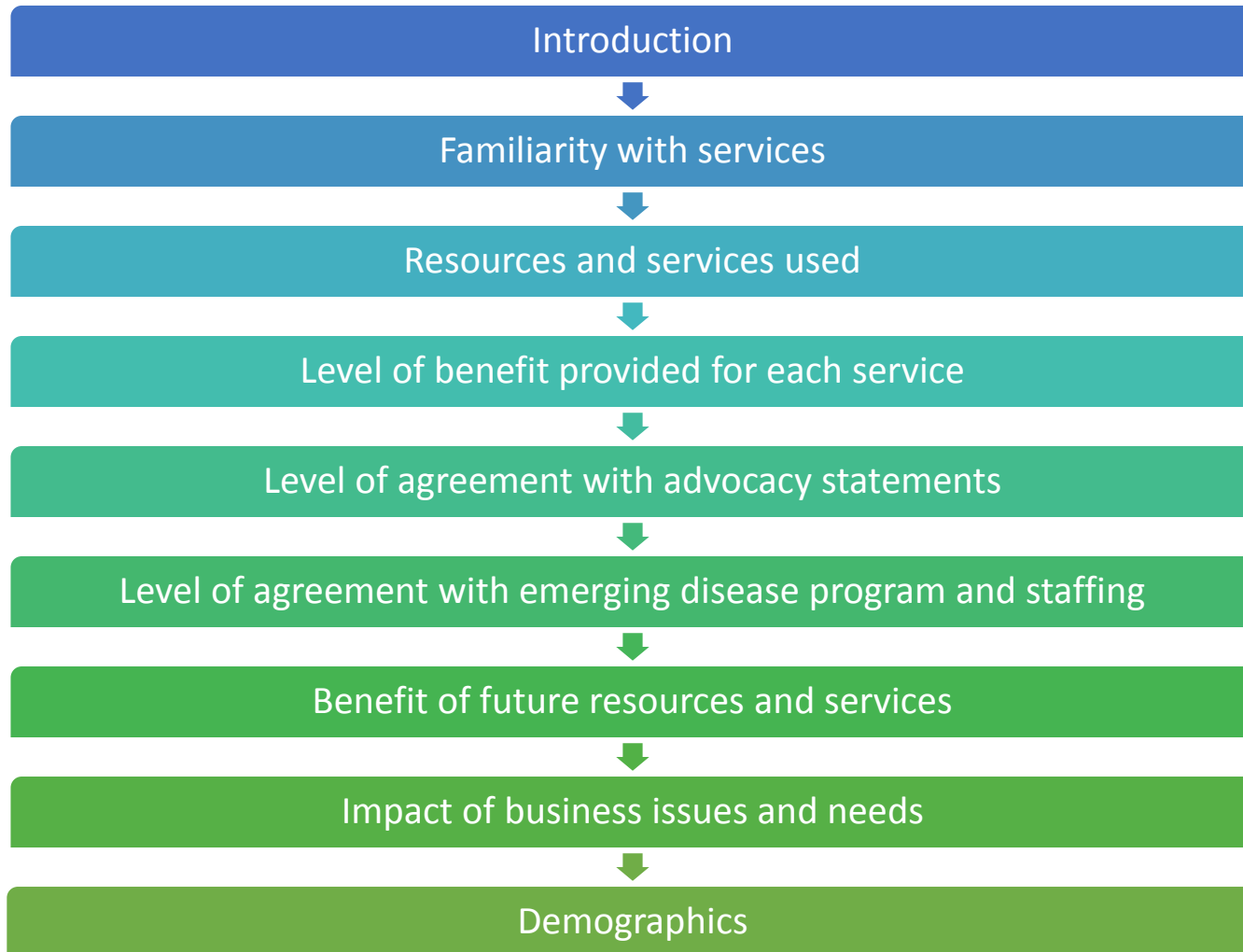
A total of 236 respondents completed the entire survey; this is ~25% of AASV's total membership.*

Fielding Timeline

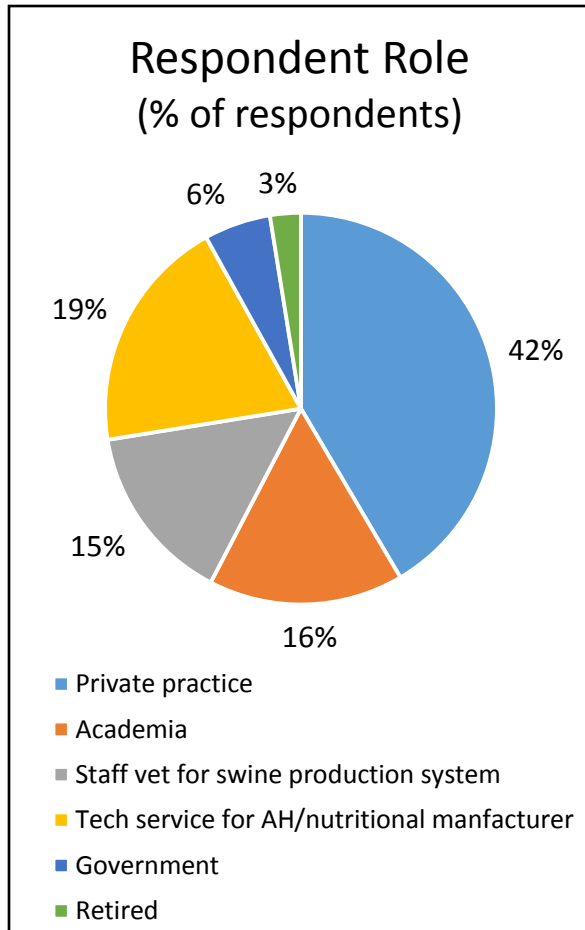


*20 additional respondents completed a portion of the survey and their data are included in this report.

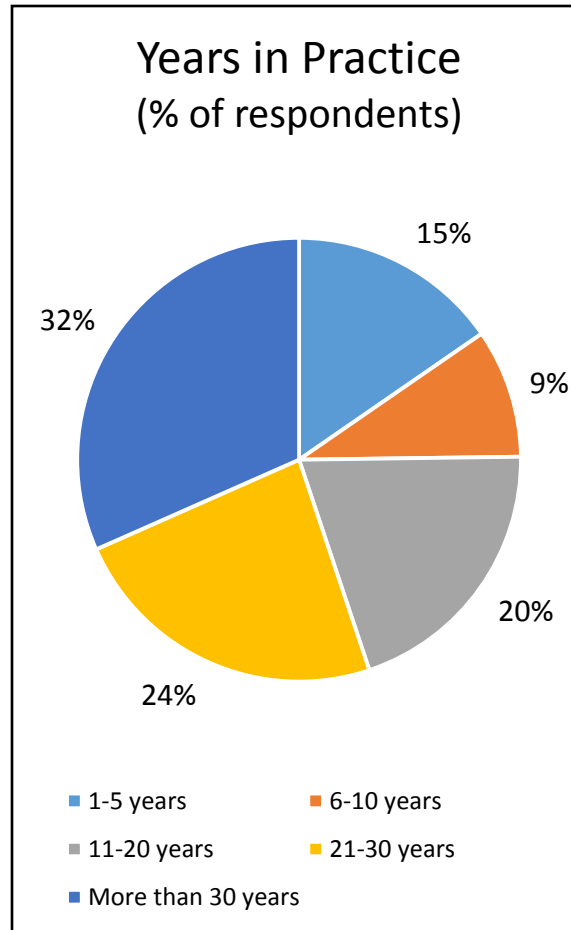
Questionnaire Content



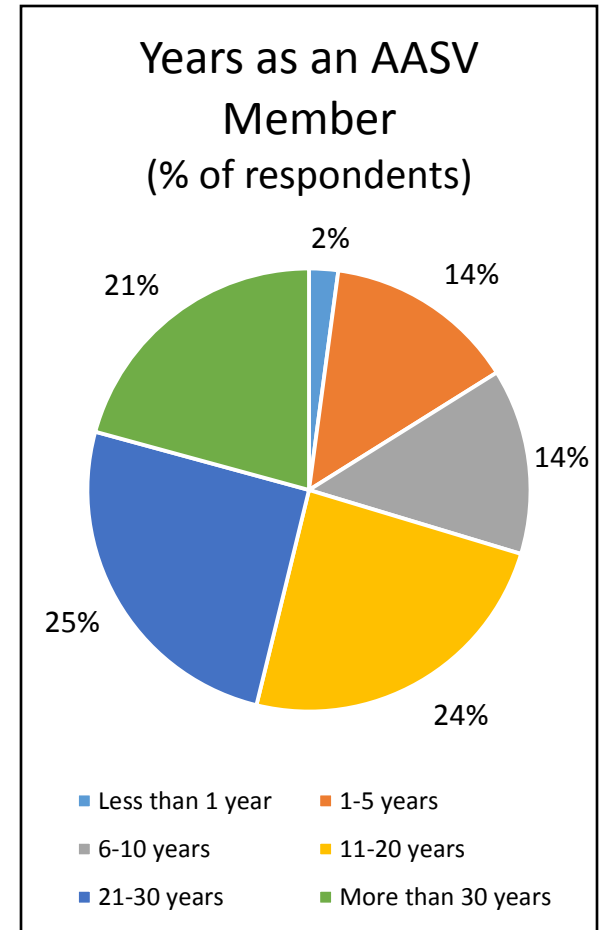
Respondent Profile (n=236)



14. Which one of the following best describes your employment as a veterinarian?



15. For how many years in total have you been a veterinarian?

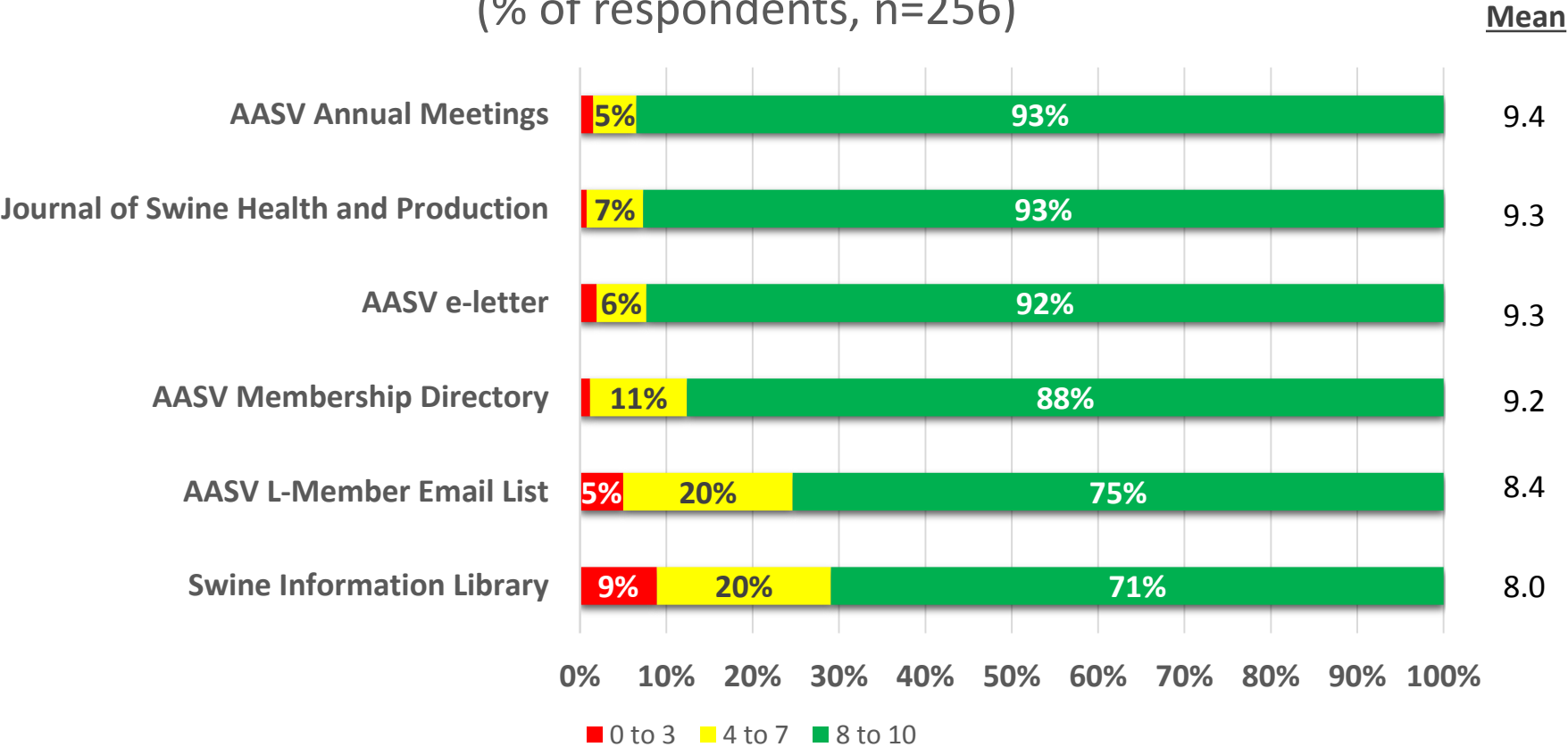


16. For how many years in total have you been a member of AASV?

Key Findings

Familiarity with Services/Resources Provided by AASV

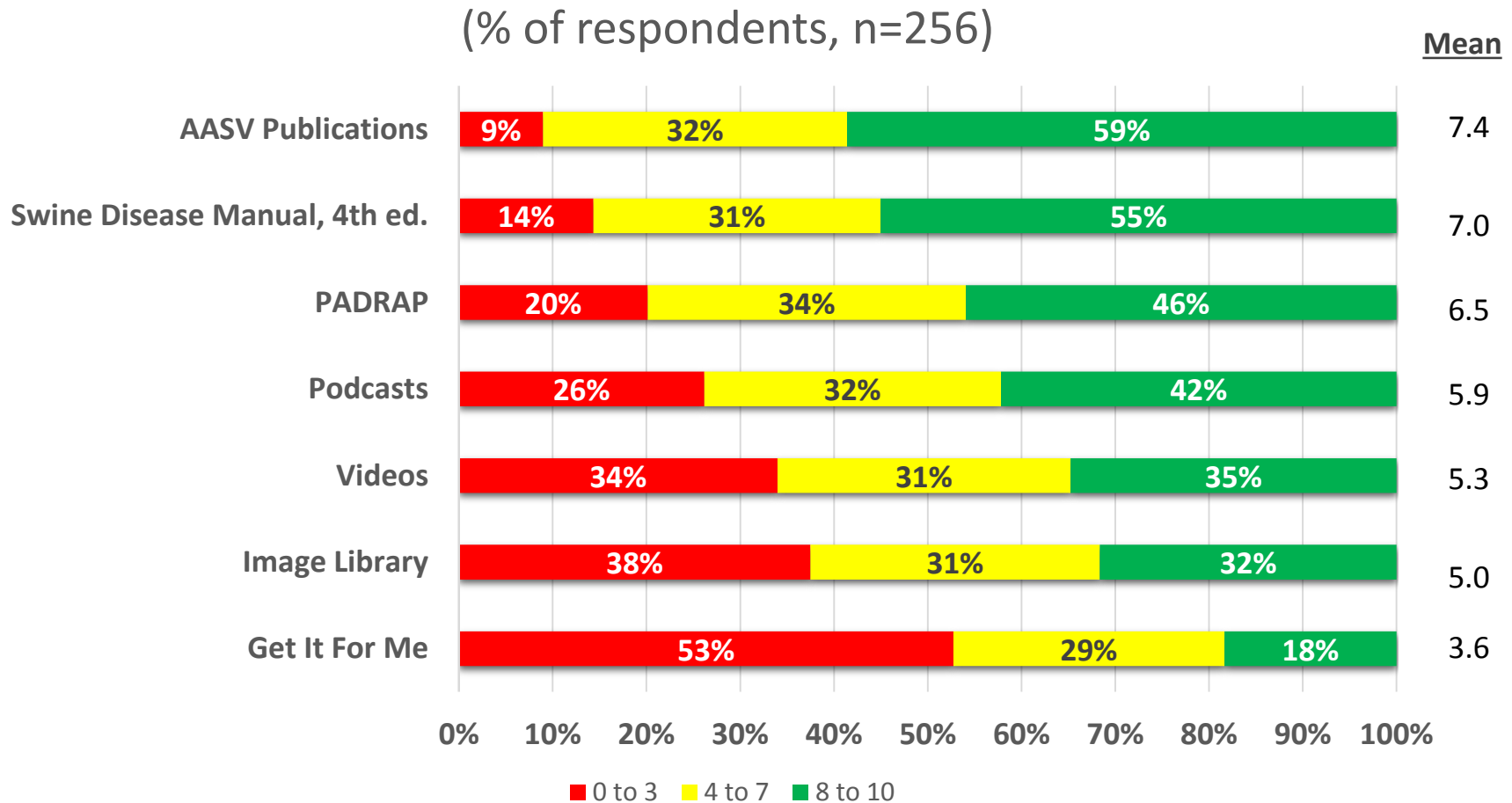
(% of respondents, n=256)



1. Please rate your familiarity with the services/resources provided by AASV described below.
 0 = Not at all familiar, 10 = Extremely familiar

Note: Responses <4% are not labeled in the graph.

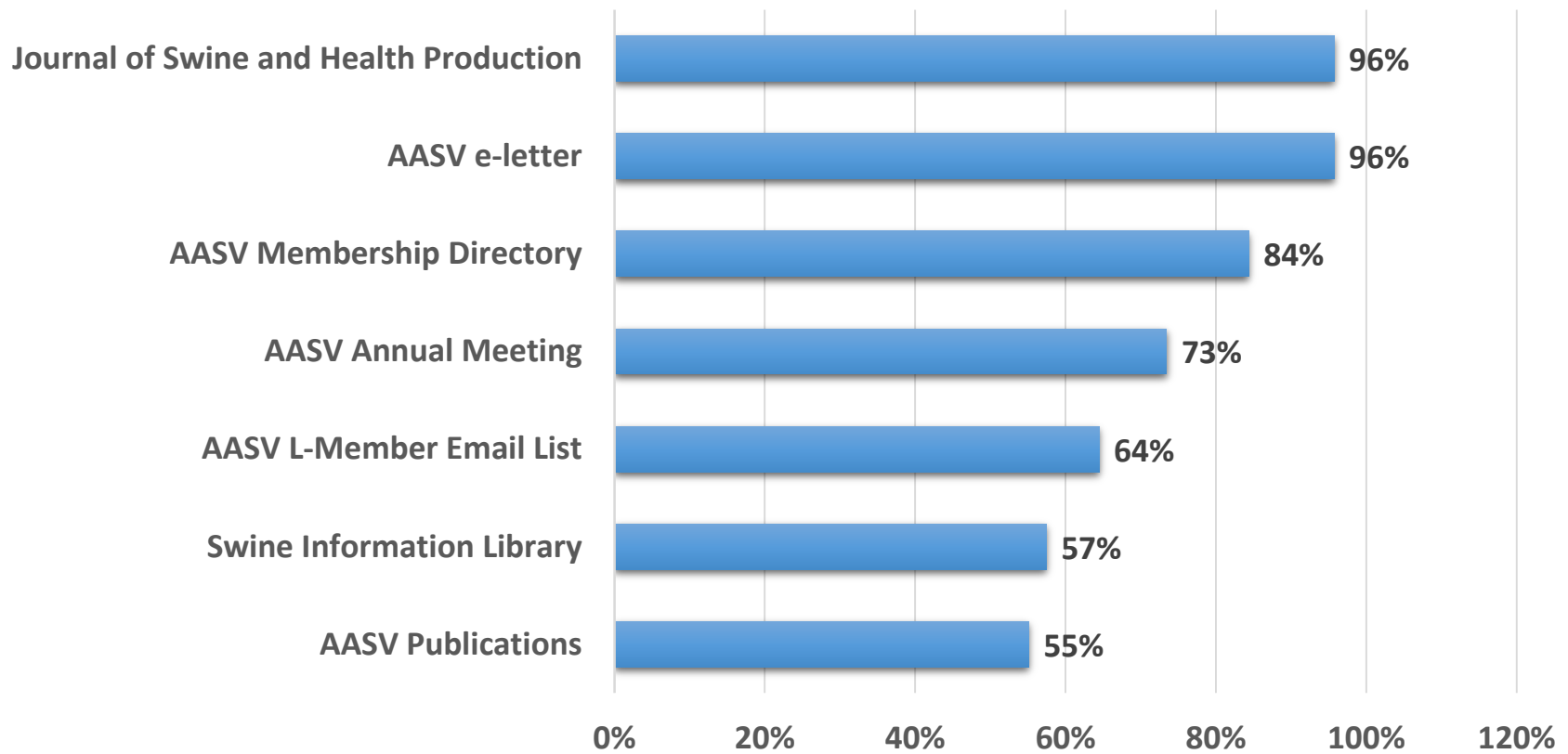
Familiarity with Services/Resources Provided by AASV (continued)



1. Please rate your familiarity with the services/resources provided by AASV described below.
0 = Not at all familiar, 10 = Extremely familiar

AASV Resources/Services Used MOST by Members in Last 12 Months

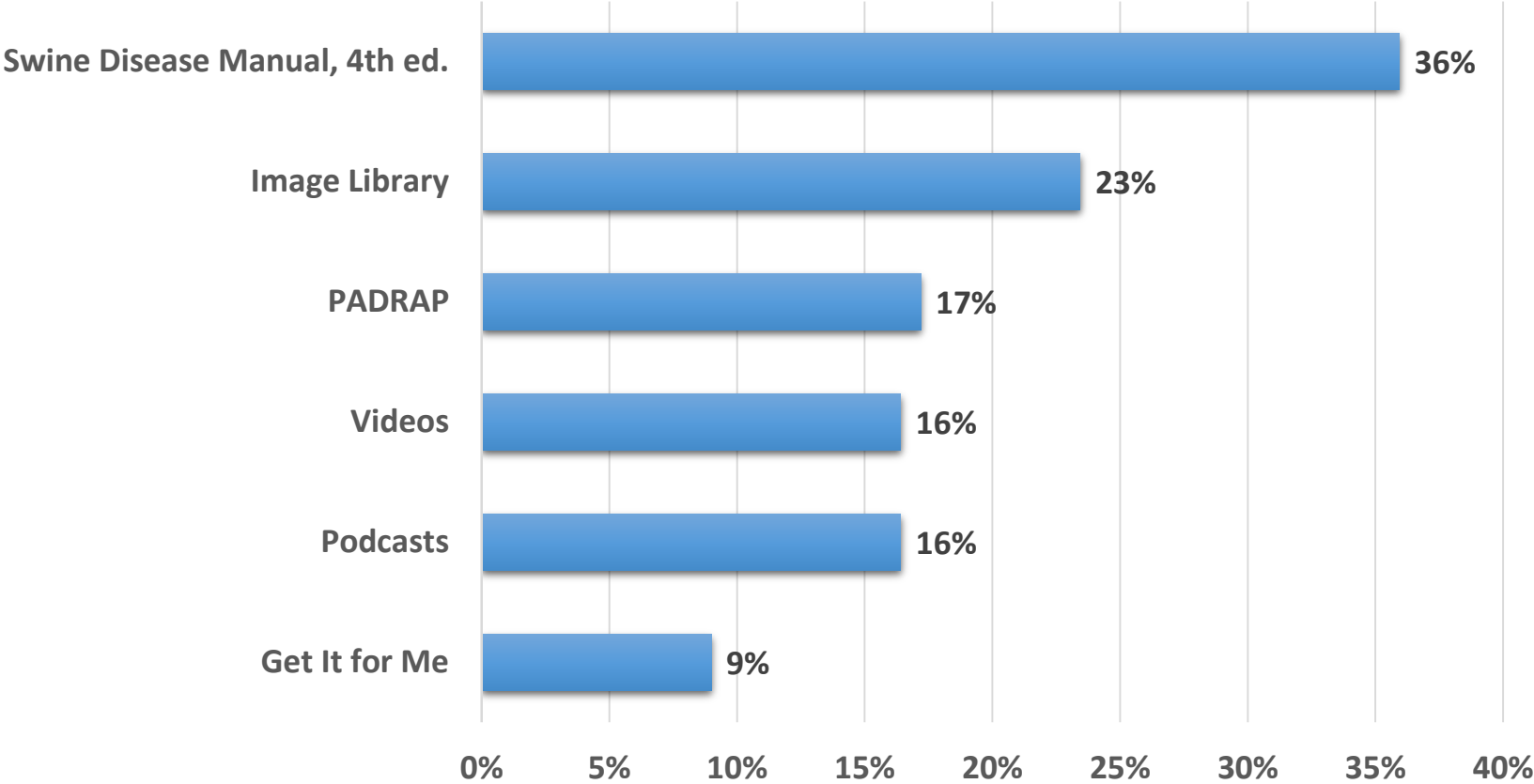
(% of respondents, n=256)



2. Please indicate which of the following AASV resources/services you have used or participated in during the last 12 months. Multiple responses.

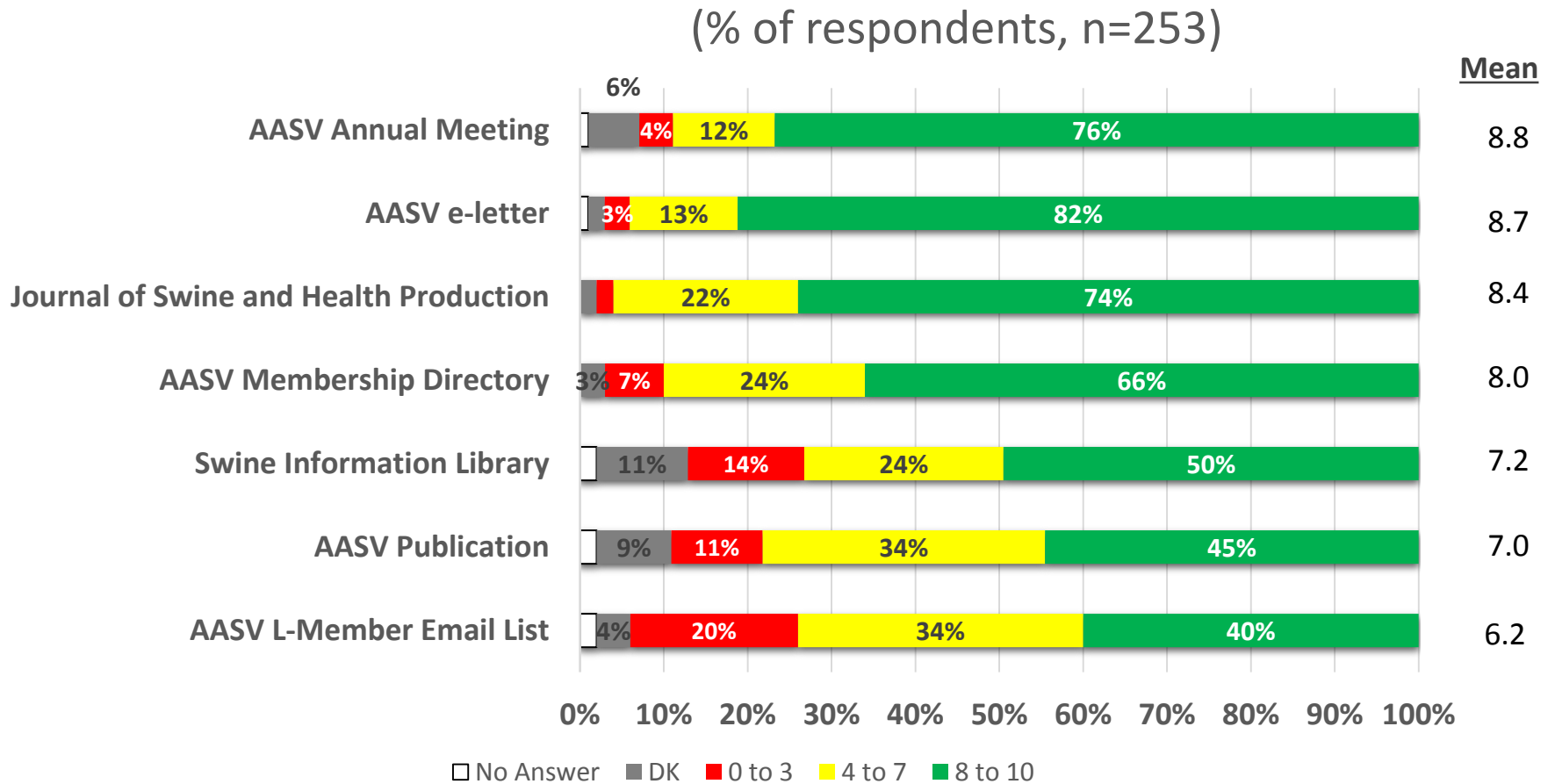
AASV Resources/Services Used LEAST by Members in Last 12 Months

(% of respondents, n=256)



2. Please indicate which of the following AASV resources/services you have used or participated in during the last 12 months. Multiple responses.

MOST Benefit Received from Services/Resources Provided by AASV

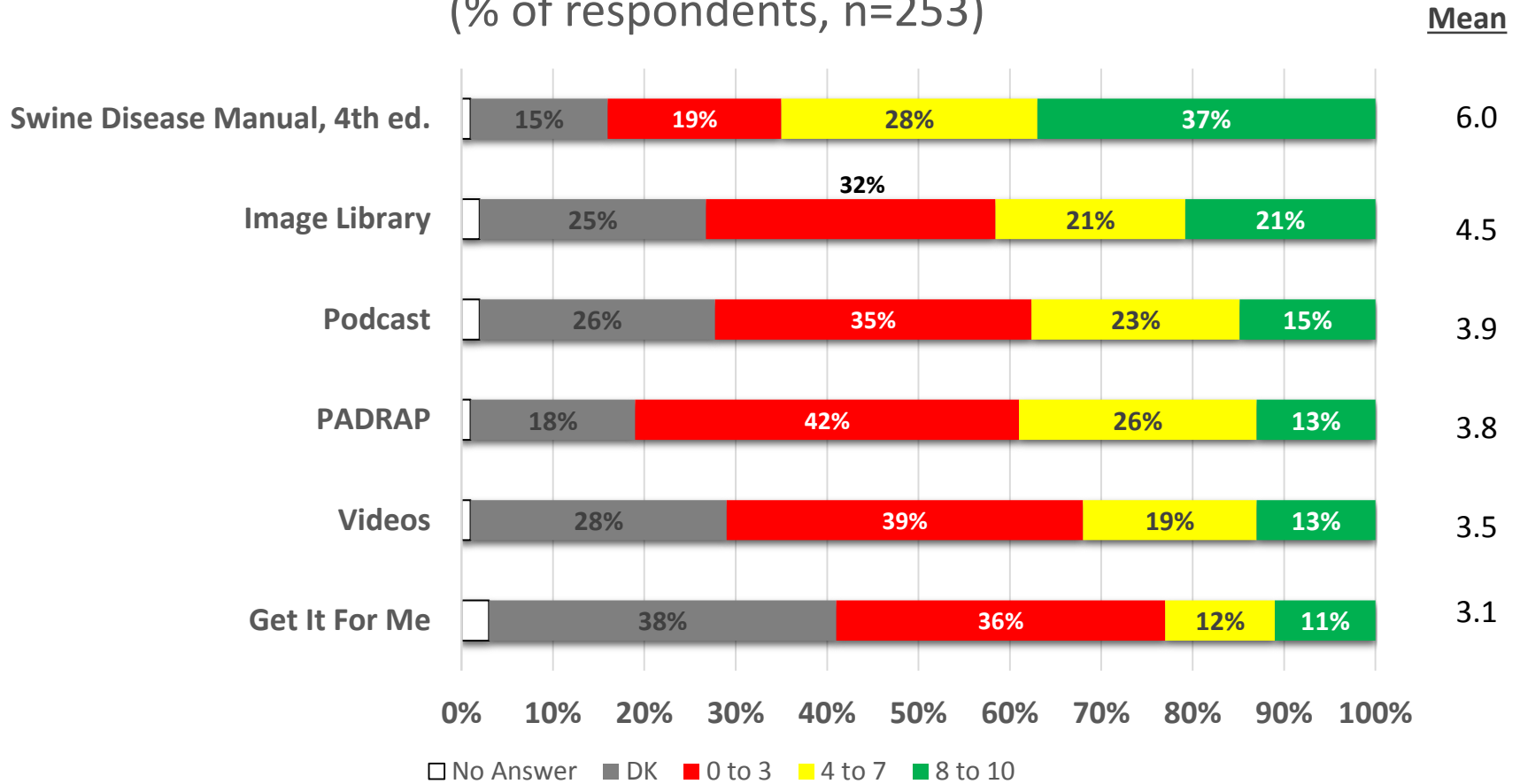


3. Please rate the level of benefit you personally have received from each of the resources/services provided by AASV listed below.
0 = No benefit, 10 = Great benefit

Note: Responses <4% are not labeled in the graph.

LEAST Benefit Received from Services/Resources Provided by AASV

(% of respondents, n=253)



Note: Responses <4% are not labeled in the graph.

3. Please rate the level of benefit you personally have received from each of the resources/services provided by AASV listed below.
0 = No benefit, 10 = Great benefit

Services/Resources Provided by AASV – Ranking Summary

	Usage (% of Respondents Who Used Service/Resource)	Benefit (% Top Box)*
AASV e-letter	1	1
AASV Annual Meeting	3	2
Journal of Swine and Health Production	1	3
AASV Membership Directory	2	4
Swine Information Library	5	5
AASV Publication	6	6
AASV L-Member Email List	4	7
Swine Disease Manual, 4 th ed.	7	8
Image Library	8	9
Podcast	10	10
PADRAP	9	11
Videos	10	12
Get It For Me	11	13

Difference of >3 in ranking – low usage but higher benefit.

* Top box = ratings of 8-10 on 0-10 scale

Services/Resources Provided by AASV – Summary (continued)

Benefit Rating	Mean Rating Total Sample	Mean Rating Users Only*
AASV e-letter (n=251, 231)	8.7	8.8
AASV Annual Meeting (n=250, 173)	8.8	9.4
Journal of Swine and Health Production (n=253, 232)	8.4	8.5
AASV Membership Directory (n=253, 204)	8.0	8.4
Swine Information Library (n=249, 135)	7.2	8.7
AASV Publication (n=249,129)	7.0	8.0
AASV L-Member Email List (n=249, 157)	6.2	7.1
Swine Disease Manual, 4 th ed. (n=251,81)	6.0	8.2
Image Library (n=249, 52)	4.5	8.1
Podcast (n=249, 50)	3.9	6.9
PADRAP (n=250, 35)	3.8	7.0
Videos (n=250, 35)	3.5	7.4
Get It For Me (n=245, 14)	3.1	9.3

Users of these tool/services feel much differently about their benefit than the average of all respondents and gave them “top box ratings”

*Users of each service/tool

Respondents were asked to read the following before answering questions on AASV's "Advocacy" efforts

The AASV participates in outreach efforts to promote an understanding of the swine veterinarian's perspective on issues of importance in pork production. Swine veterinarians are regarded as the voice for what's in the best interest of the animals. AASV advocates for the animals and to promote the interests of our members and the swine veterinary profession by:

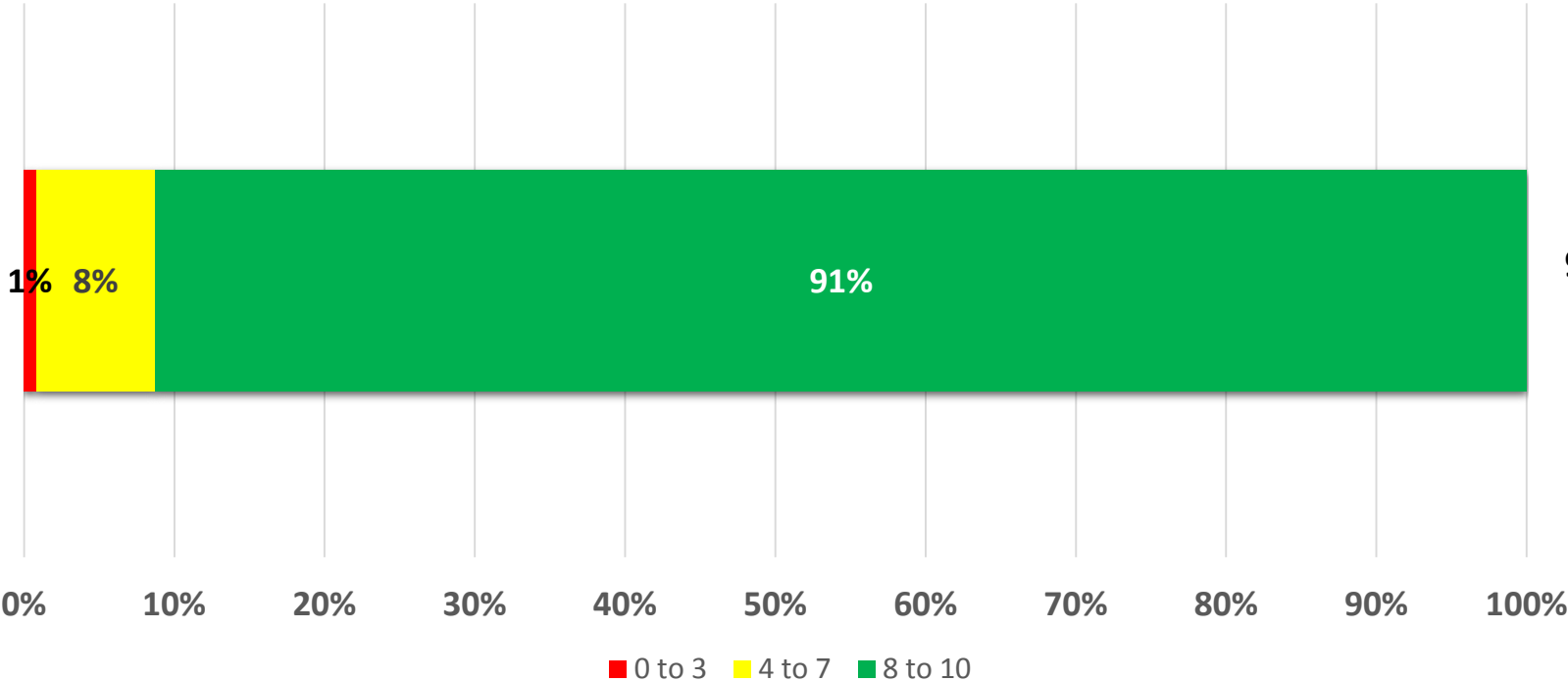
- Educating our colleagues primarily through participation on AVMA committees, councils, task forces and the House of Delegates as an allied member of the Association.
- Advocating for legislation and regulations that promote the well-being and health of the animals, pork safety and public health by supporting the advocacy efforts of groups such as the AVMA, the National Pork Producers Council and the Animal Agriculture Coalition among others.
- Providing input and comment on proposed legislation and regulation that impacts pork production and swine veterinary medicine through interaction with regulatory agencies such as the Food and Drug Administration, USDA's Animal and Plant Health Inspection Service and the Food Safety Inspection Service, as well as groups such as the Centers for Disease Control and Prevention.
- Promoting research into pork production, swine health and well-being through collaboration with the National Pork Board, universities and government research institutes including the National Institute for Food and Agriculture and the Agricultural Research Service.

From a global perspective, AASV is often asked to comment or provide input on issues of international perspective such as foreign animal disease, antimicrobial use, welfare and trade through the interaction with groups such as the United Nation's Food and Agriculture Organization (FAO), the World Organization for Animal Health (OIE), and CODEX (an organization for international standards).

Extent of Agreement with AASV's Efforts to Advocate for its Members

AASV's Efforts to Advocate for Members
(% of respondents, n=251)

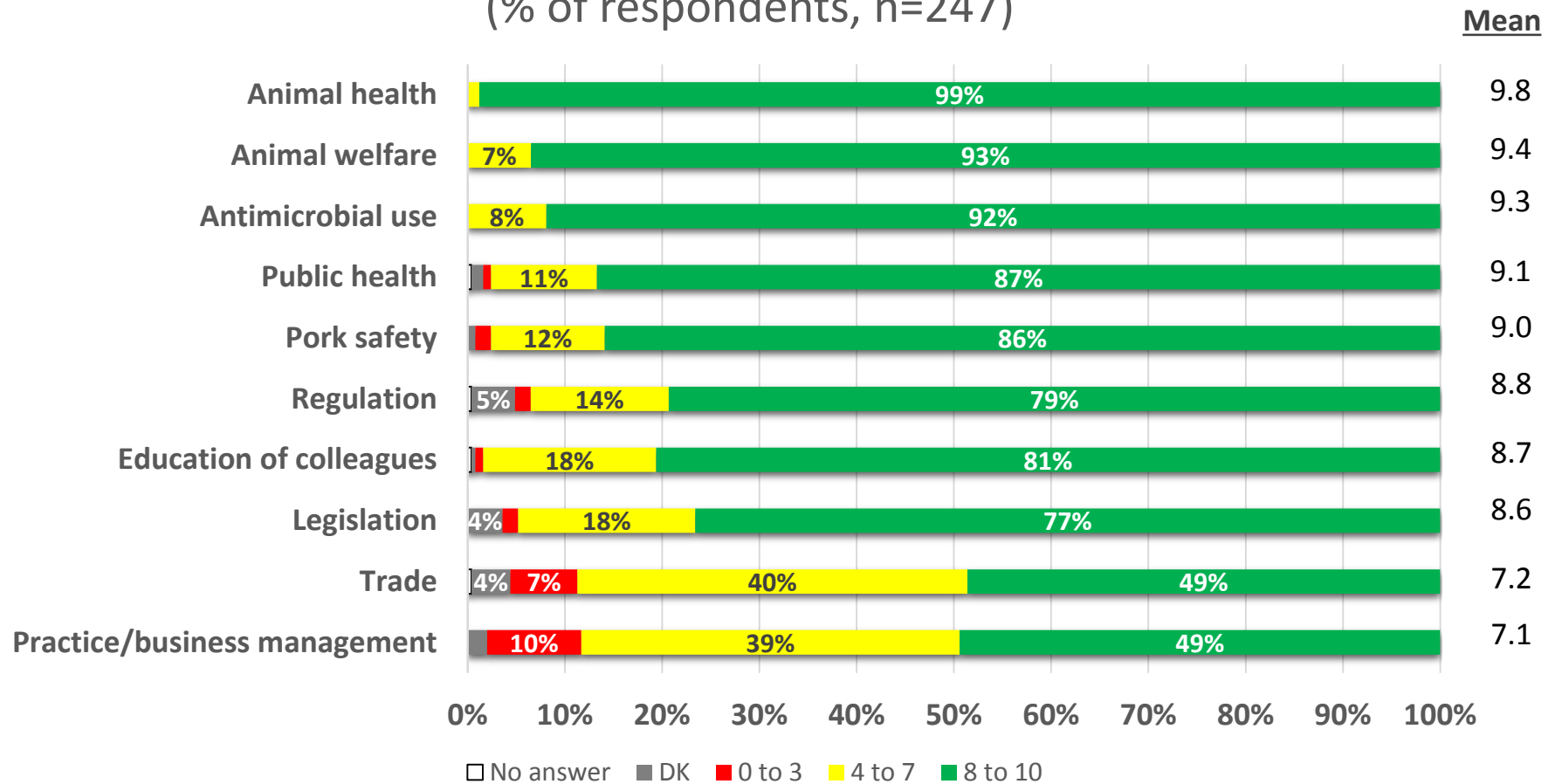
Mean



4. To what extent do you agree that AASV's efforts to advocate for its members, the swine veterinary profession and the animals as described above is an important part of AASV's role?
0 = Completely disagree, 10 = Completely agree

Importance of Advocacy Focus Areas

(% of respondents, n=247)

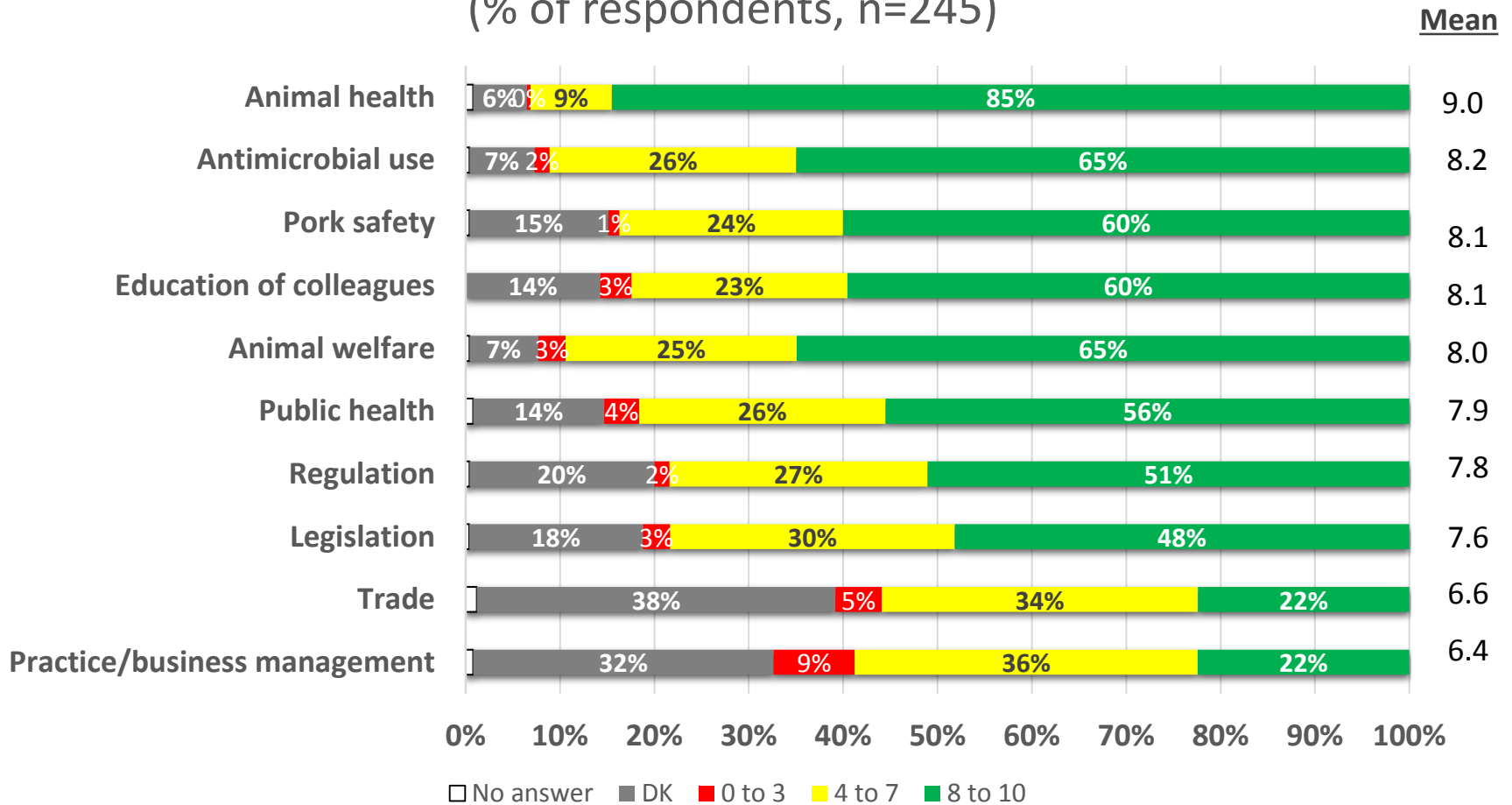


5. Please rate the importance to the swine industry of each of AASV's advocacy focus areas.
0 = Not at all important, 10= Extremely important

Note: Responses < 4% are not labeled in the graph.

Performance of Advocacy Focus Areas

(% of respondents, n=245)



6. In your opinion, how well has AASV performed in each advocacy focus area?
0 = Poor performance, 10 = Excellent performance

Note: Responses <4% are not labeled in the graph.

Advocacy Focus Area – Summary

	Importance (% Top Box)*	Performance (% Top Box)*
Animal health	99%	85%
Animal welfare	93%	65%
Antimicrobial use	92%	65%
Public health	87%	56%
Pork safety	86%	60%
Education of colleagues	81%	60%
Regulation	79%	51%
Legislation	77%	48%
Trade	49%	22%
Practice/business management	49%	22%

* Top box = ratings of 8-10 on 0-10 scale

Advocacy Focus Area – Ranking Summary

	Importance (% Top Box)*	Performance (% Top Box)*
Animal health	1	1
Animal welfare	2	2
Antimicrobial use	3	2
Public health	4	4
Pork safety	5	3
Education of colleagues	6	3
Regulation	7	5
Legislation	8	6
Trade	9	7
Practice/business management	9	7

Difference of 3
in ranking –
higher
importance but
lower
performance

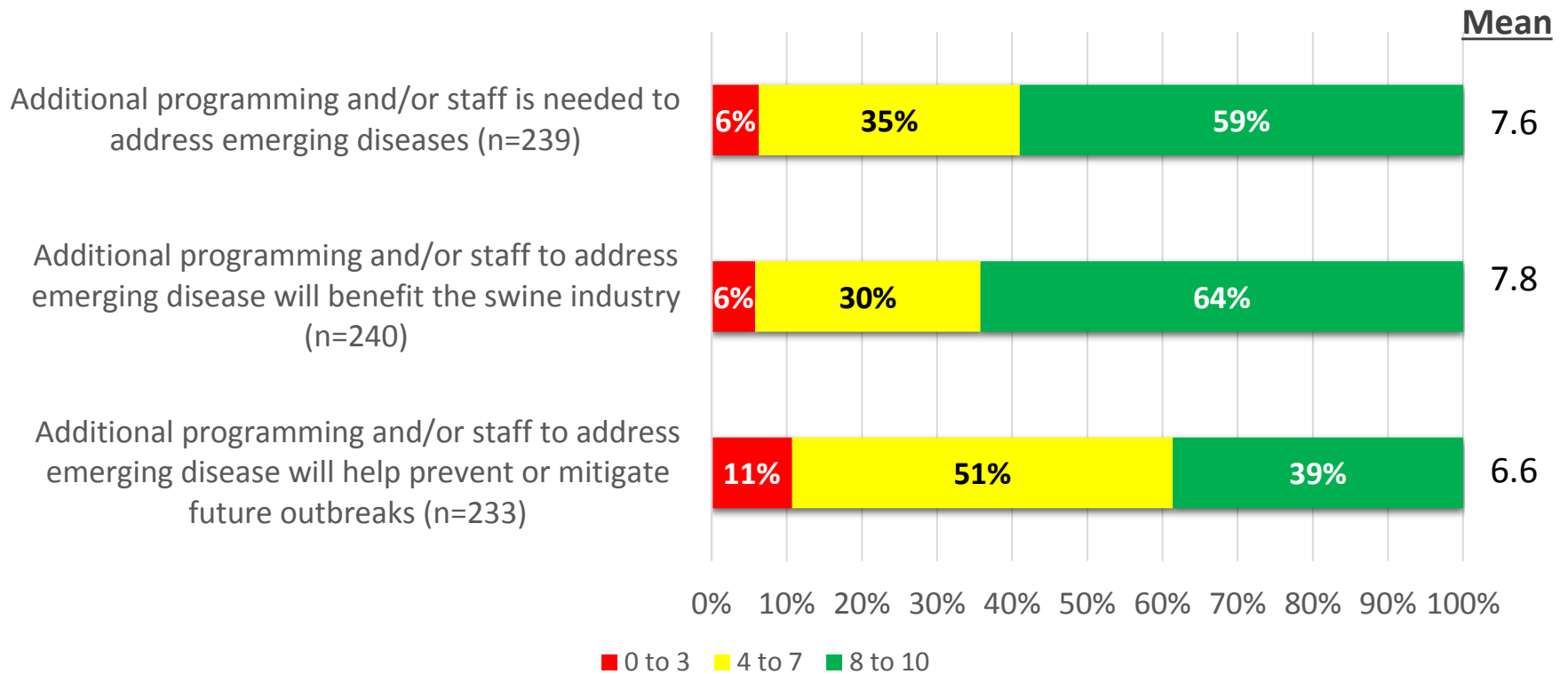
* Top box = ratings of 8-10 on 0-10 scale

Respondents were asked to read the following before answering questions on AASV's efforts to address "emerging diseases"

- The recent incursion of at least three distinct new viruses (Swine Enteric Corona viruses) into the US has changed the dynamics of how AASV is meeting the challenges of an emerging disease. In the past, greater reliance on the US government was the norm. Going forward, the swine industry needs to be prepared to effectively identify emerging diseases and to implement a rapid response along with the National Pork Board and the National Pork Producers Council. The interface between herd veterinarians and pork producers is a cornerstone to swine health at the farm level and at the national herd level. AASV can better capitalize on this fact by assisting veterinarians and producers in recognizing emerging swine health issues and mounting an appropriate response. The AASV is considering additional programming and staff in order for the AASV to meet emerging disease challenges.
- Funding for this programming/staff position would increase the budgeted expenses of AASV. Current services not valued by members could be discontinued and resources reallocated to fund this concept.

Emerging Disease – Programming and Staffing

Level of Agreement with Statements (% of respondents)



7, 8, 9. To what extent do you agree that...
0 = Completely disagree, 10 = Completely agree

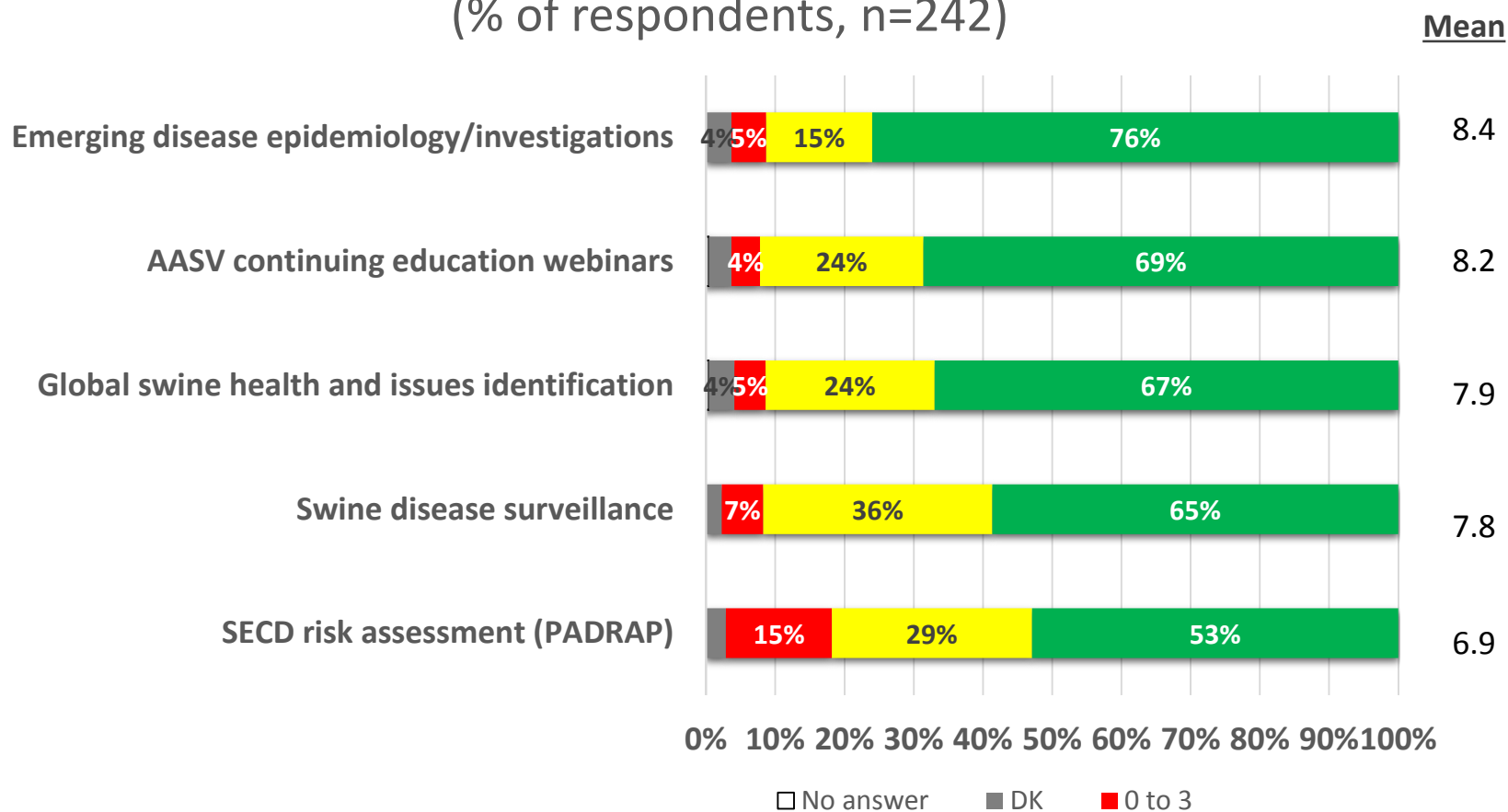
Additional Information Needed to Support Proposed Programming/Staff Positions to Address Emerging Swine Diseases

Additional information needed (open ended)	% of Respondents (n=72)
What will be the link between various organizations such as NPB, NPCC, USDA, FAD, FAZD, APHIS, FSIS and field vets? How will they collaborate?	19%
More information regarding the position and duties – how many people? What will they do? How will they investigate?	18%
What is the strategic plan? Objectives?	14%
How will the position be funded? What is the expense?	10%
Should be a governmental/USDA position/funded by USDA/government responsibility	10%
What will be cut?	6%
Funding from outside such as pork producers/NPB	6%
Will dues/membership fees increase?	4%
How will adding staff and programming make any difference to outcomes?	3%
How will they respond to an immediate outbreak?	3%
How will this affect non-US members/what is the international component?	3%
Other	8%

10. What additional information, if any, do you most need to know to support AASV undertaking the proposed new programming/staff position to address emerging swine diseases? (open ended)

Anticipated Benefit Derived from Potential New AASV Resources/Services

(% of respondents, n=242)

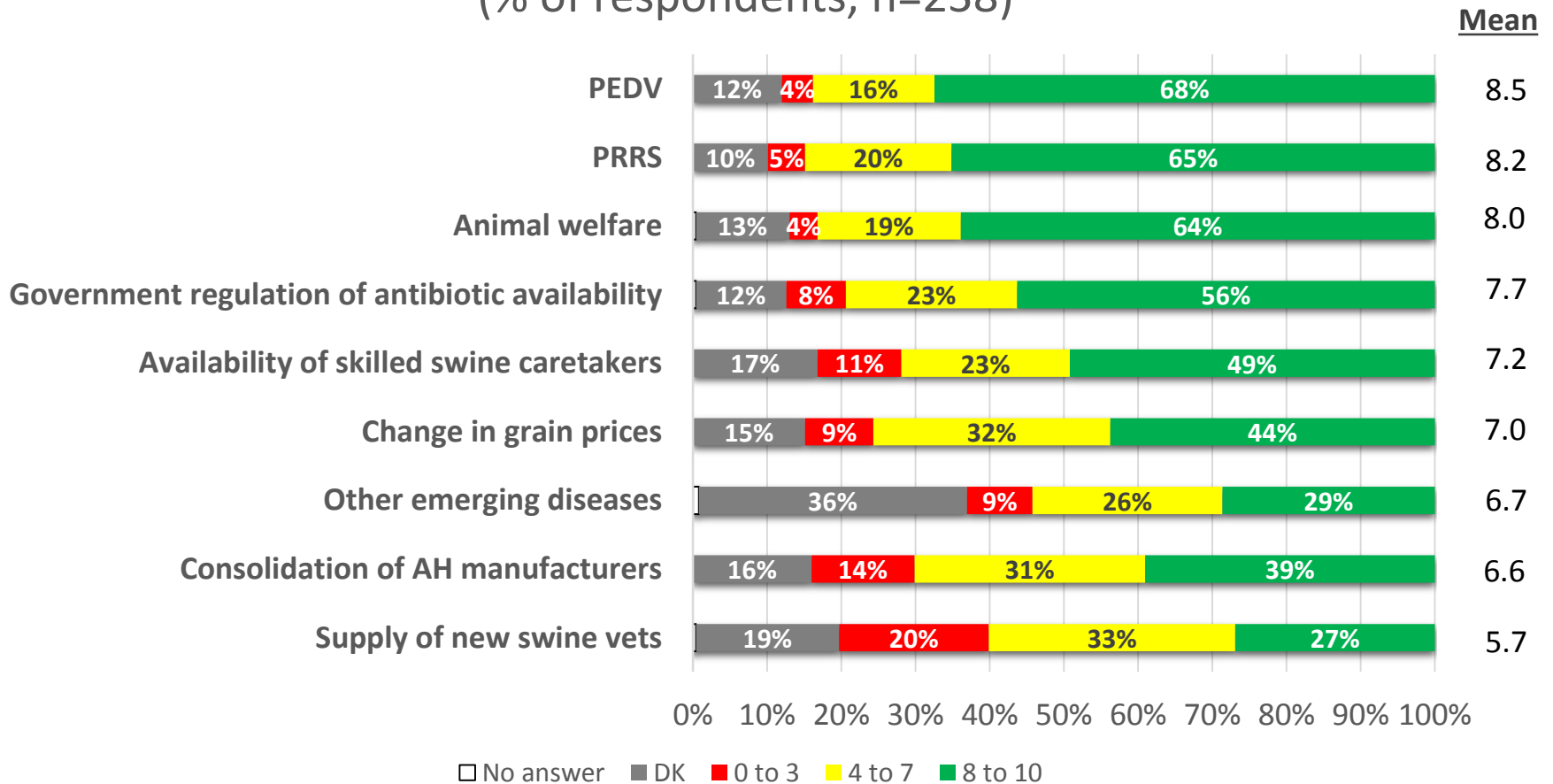


Note: Responses <4% are not labeled in the graph.

11. Below is a list of resources or services the AASV may offer in the future. Please rate the level of benefit you personally would derive from each of the resources/services listed below. 0 = No benefit, 10 = Great benefit

Anticipated Impact of Business Issues and Needs in 2014-2015

(% of respondents, n=238)



Note: Numbers less than 4% are not labeled in the graph.

13. Below is a list of issues you may be facing in your practice. Please rate the extent to which each of these issues will impact your business during the remainder of 2014 and in 2015. 0 = No impact, 10 = Great impact

Conclusions & Recommendations

Conclusions & Recommendations

Objective: Assess AASV members' perceptions of the organization and the services/programs that it provides.

- AASV **Resources/Services** that were used by over half of current members and were also rated the MOST beneficial (average rating 8.0 or higher on a 0-10 point scale) were:



- Services and programs that were the least familiar, used the least and rated the least beneficial overall were:



- However, although **“Image Library,” “PADRAP,” “Videos”** and **“Get It For Me”** had benefit ratings of >7/10 among their users. This may indicate these 4 services are under-marketed.

Recommendations: Continue to focus on the most beneficial programs/services. Gain more users for **“Image library,” “PADRAP,” “Videos,”** and **“Get It For Me”** by finding advocates of those services and understanding why they use them and how the services are beneficial; use these insights to develop messaging that encourages new use.

Conclusions & Recommendations

Objective: Assess AASV members' perceptions of the organization and the services/programs that it provides.

- AASV's members feel the organization's **performance** on key programs is quite **high**.
- All of the **advocacy areas** except **"Trade"** and **"Practice/Business Management"** were rated highly for both importance and AASV's performance.
- AASV performs highest on **"Animal Health," "Antimicrobial Use," "Pork Safety," "Education of Colleagues"** and **"Animal Welfare."**

Recommendations: Consider ways to improve performance on **"Trade"** and **"Practice/Business Management"** - ½ of respondents consider these highly important, but less than ¼ of respondents felt AASV's has performance on them has been "excellent".

Conclusions & Recommendations

Objective: Assess member attitudes toward proposed changes/enhancements in AASV programming.

- Over half of respondents highly agree that additional programming/staffing is needed to address emerging diseases.
- Over 60% of respondents highly agree that the additional programming/staffing will benefit the swine industry.
- However, only 39% of respondents agree that the additional programming/staffing will help prevent or mitigate future outbreaks.
- Members requested more information regarding the overall strategy and objectives, funding, the responsibilities of the positions as well as identifying how AASV will be collaborating with other organizations.

Recommendations: **Continue** with proposed additional programming/staffing enhancements. If needed, consider re-allocating funds from lesser used/beneficial programming areas. **Communicate** details to members about the programming that address their primary questions.

Conclusions & Recommendations

Objective: Identify opportunities for new programming/services that members feel AASV should offer in the future.

- On average, **“Emerging disease epidemiology/investigations”** and **“AASV continuing education webinars”** were considered to provide the most potential benefit to members.
- **“Global swine health and issues identification,” “Swine disease surveillance,”** and **“SECD risk assessment (PADRAP)”** were also considered beneficial by most respondents but to a slightly lesser extent.

Recommendations: Continue with programs on **“Emerging disease epidemiology/investigations”** and **“AASV continuing education webinars”** as they would provide the most potential benefit to members.

Conclusions & Recommendations

Objective: Establish AASV members' key issues and needs in their businesses.

- Business issues and needs that will highly impact over half of respondents were:

PEDV

PRRS

Animal welfare

Government regulation of antibiotic availability

- Business issues and needs that had less of an impact were:

Availability of skilled swine caretakers

Change in grain prices

Other emerging diseases

Consolidation of AH manufacturers

Supply of swine vets

Recommendations: Focus information and efforts on business issues that will most impact members - emerging diseases (“**PEDV**”, “**PRRS**”), “**Animal welfare**” and “**Government regulation of antibiotic availability.**”

Thank You!

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Appendix

Q1,2,3 – Full Description of Services/Resources

Services/Resources

Journal of Swine Health and Production – peer-reviewed swine research published 6 times/year in print and online

AASV e-letter – distributed weekly; contains research abstracts, industry news, AASV news, upcoming meetings, position announcements and people on the move

AASV Annual Meeting – veterinary continuing education; print and CD proceedings

AASV-L Member Email List – email messages are distributed to subscribers on the AASV electronic mailing list

PADRAP (Production Animal Disease Risk Assessment Program) – PRRS risk assessment for the breeding herd

AASV Membership Directory – print copy published every 2 years; online edition updated weekly

Swine Information Library (online and flash drive) – compilation of JSHP and proceedings articles from AASV, Leman, ISU, George Young and IPVS; updated annually

Swine Disease Manual, 4th ed – concise overview of major swine diseases; online for member access; print copies available for purchase

AASV Publications – available electronically on AASV website (Euthanasia Guidelines, PCVAD Brochure, CSF Brochure & Poster, Got Tonsil Brochure, Boar Stud Guidelines, Guidelines for Judicious Use of Antimicrobials, Student Recruitment, others)

Get It For Me – online access to journal articles at no cost to membership

Image Library – images donated by AASV members on a number of topics related to swine health and production

Videos – from AASV annual meeting and member recollections

Podcasts – interviews with annual meeting speakers

Q11 – Full Description of Membership Benefits

Membership Benefit Description

Swine disease surveillance (e.g. SIV, PED, SECD) – surveillance (both active & passive) for disease prevalence, spread & trends

Global swine health and issues identification – work with government and allied industry to identify developing health challenges and issues in other countries and to sensitize the US pork industry to such issues

Emerging disease epidemiology/ investigations – rapid response to high morbidity/mortality production diseases as they appear in US

SECD risk assessment (PADRAP) – build, implement and refine a risk assessment tool for Swine Enteric Coronavirus Diseases (risk factors for transmission of the virus and incursion into a farm)

AASV Continuing Education Webinars – periodic webinars that provide continuing education opportunities