INTRODUCTION
The Division for Bar Services undertook this project to gain and share insights on bar association growth and membership trends. We culled the data we have been formally tracking from bar associations on their administration and membership since 1976 (see Appendix). What have we learned?

GROWTH
Bar associations, mimicking the legal profession, experienced explosive growth (measured by membership size, staff size and expenditures) in the 1980’s. Growth continued, but at a slower rate over the next decade and has gradually leveled off since the economic downturn in 2008. Membership market share and retention rates among voluntary bars have remained relatively stable since 2007.

MEMBER CONCERNS/VALUES
Research on membership concerns and values indicate intangible benefits are valued more highly than tangible benefits such as discounts on products and services. Members want their bars to facilitate networking opportunities and promote the reputation of the profession. Keeping informed and current on changes in the law have emerged as top concerns in recent years, replacing maintaining a work-life balance which was a prominent concern in surveys conducted between 2005-2009.

“One size fits all” no longer applies. Bar members want customized communications and services. They want information filtered and services provided to meet their practice and personal needs.

DUES LEVELS/PACKAGES
We have seen a shift in the way bars are integrating and bundling services into their dues packages. More incentives such as free or reduced CLE, legal research services and social/networking events are bundled with membership dues and fees.
OVERALL BAR ASSOCIATION GROWTH

MEMBERSHIP, STAFF SIZE, AND EXPENDITURES

MEMBERSHIP
We began tracking the total membership sizes for state and local bars in the 1980 Directory of Bar Activities. The rate of growth for all types of bars was greatest between 1980-1991, with a 59% increase in the average number of members for voluntary state bars, 63% growth for unified state bars, and 19% growth for both locals bars with 2,000+ members and local bars under 2,000 members. Growth has continued, but at a much slower pace in subsequent years.

STAFF SIZE
The average staff size of both voluntary and unified state bars doubled between 1980-1991. Staff size grew at a much slower rate in subsequent years for state and local bars, consistent with the trends in membership and revenue growth.

EXPENDITURES
The average expenditures of both voluntary and unified state bars follow similar trends as those for membership size and staffing, with the greatest increases seen between 1980-1991.

Bar associations experienced tremendous growth from 1980-1991, following the overall trend in the legal profession. Expenditures and staffing more than doubled and membership grew by more than 50%.
The following information is derived from the 2013 Membership Marketing Benchmarking Report, (5th annual) published by Marketing General Incorporated (MGI), a consulting firm located in Washington, DC which specializes in membership growth consulting and planning. The 2013 report includes the responses from 695 trade and individual member associations. Unless otherwise noted, results are for the aggregate group of all respondents. Where applicable, bar association trends are noted in italics.

Highlights of 2013 results and trends:

Overall membership numbers
- 52% of respondents reported a growth in membership; 31% reported a decline; and 16% indicated membership remained the same, consistent with 2012 and 2011 data. Growth in 2010 was considerably less – 48% indicated their membership declined overall and only 36% noted an increase. The growth reported by voluntary state bars in 2013 was very similar (50% increased, 30% unchanged, and 20% decreased). However, a lower percentage of local bars reported that they experienced a growth in membership (43% for large locals, 29% for small locals).

- Respondents reported that the biggest impediments to growth were 1) insufficient staff, 2) difficulty attracting and/or maintaining younger members, and 3) perception of the association and/or its culture. This echoes what we see in bar associations. Insufficient resources are always a challenge. Attracting new/young members is a challenge, but not as big a challenge as retaining them. The perception of bar association culture – “being cliquey” or “an old boys network” is a common thread seen in bar association membership surveys.

- Associations reporting less than 60% retention rates for first-year members are significantly more likely to report declines in overall membership during the past year, suggesting problems retaining new members may be a substantial source of overall membership decline.
Membership renewals

- 35% of respondents indicated their percentage of renewals increased over the past year; 31% reported a decline; and 31% indicated the renewal rate was unchanged overall. This again is consistent with 2012 and 2011 data. The percent of respondents indicating renewals increased was considerably less in 2010 and 2009 (21% and 22%).
- Similar to findings in 2012, the top three reasons cited for not renewing were 1) budget cuts/economic hardship, 2) lack of engagement with the organization, and 3) unable to justify membership costs with ROI.
- The average renewal rate for NEW members was reported at 68%.

Membership recruitment

- Respondents indicated the top three most effective methods of member recruitment were word-of-mouth recommendations (58%, up from 51% in 2012), Association website (33%, 34% in 2012) and email (31%, down from 37% in 2012). It appears that association reputation and having peers belonging to or involved in the association increases the likelihood of a potential member joining the association. Also, email communications appear to be less effective, most likely due to email fatigue.
- Respondents indicated the top two reasons members joined their association were networking with others in the field (24%) and access to specialized and/or current information (13%).

Member engagement/renewal

- The top three communication methods used to engage new members were an email welcome (79%), a mailed welcome kit (60%) and a membership card or certificate (51%).
- The top areas that associations reported seeing an increase in member participation and engagement were participation in association’s public social network (76%), participation in association’s private social network (66%) and participation in young professionals program (65%). Decreases were reported in book or directory purchases (20%), attendance at annual conference/trade show (18%) and donations to the association’s foundation or PAC.
- 38% of respondents have 4-6 renewal contacts. About 27% make 7-12 renewal contacts.
- As would be expected, associations with a greater number of renewal contacts tend to have increased renewal rates.

Member research

- About 30% of associations indicated they used some type of member research. Those associations were more likely to see increases in overall membership, renewal rates and new members.

Dues collection methods

- 54% of respondents base renewals on the anniversary date of the start of membership for each member. Bar associations traditionally have one renewal date for all members. However, many offer prorated dues for new members (70% of voluntary state bars and 64% of local bars).
- 40% of individual member associations offer installment renewal payments, 39% offer multi-year renewals, 29% offer automatic credit card renewal and 18% offer a gift or premium.
- There has been a steady decrease in the percentage of associations offering a lifetime membership renewal option.
Reasons for not renewing

• The most often cited reason for not renewing dues in individual membership associations was a lack of engagement with the organization.
• Associations with over 20,000 members were most likely to report that members do not renew because of a lack of value.

Social media

• Trends show a steady increase in the percentage of associations that use an association blog and a members-only LinkedIn site. Membership surveys conducted by state and local bars indicate that the social media outlet most used by members is LinkedIn.
• Twitter is used more often than Facebook when promoting discussion or specific sessions at events and YouTube is used more than Twitter when providing how-to information.
• Facebook is used more often than Twitter for soliciting new members and promoting membership.

Dues and membership structure

• Similar to 2011 data, most associations raise dues only when needed (63%). About 17% of individual member organizations raise their dues annually. Very few bar associations (3% of unified state bars, 20% of voluntary state bars and 4% of local bars) have any type of regularly-scheduled dues increase.
• About one-half of respondents indicated they either plan to raise dues this year or raised dues in the past year. Twelve percent of unified state bars raised dues or licensing fees last year, 50% of voluntary state bars and 28% of local bars raised their dues within the last year.
• About one-half of respondents indicated they raised their dues by 1%-5% and one-quarter raised them by 6%-10% when last increasing dues. The average percent of the dues/fees increase was about 11% for state bars and 8% for local bars.
• 42% of individual member associations indicated their membership dues were based on certain attributes (e.g., qualifications, experience, etc.). Fifteen percent have one dues price for all members. Five percent base dues on a tiered structure of increasing benefits.
BAR MEMBERSHIP GROWTH AND RETENTION

MARKET SHARE

- The average market share for voluntary state bars has ranged from 56%-67%, with the lowest share reported in 2002 and the highest reported in 2005. As noted in the chart below, it has trended downward from 2009 to the present and was last reported at 60% in the 2013 MAF.
- The average market share for local bars with over 2,000 members has ranged from 54%-62%, with the lowest share reported in 2010 and 2013 and the highest in 2002.
- The average market share for local bars with less than 2,000 members has ranged from 62%-76% with the lowest share reported in 2013 and the highest in 2006.
- Local bars with <2,000 members tend to have the highest market share percentages.
**RETENTION RATES**

We began collecting data on retention rates in 2007.

- The average retention rate for voluntary state bars has ranged from 92% in 2009 and 2013 to 97% in 2010. It has remained steady at 92%-93% each year, except for the higher level reported in 2010.
- The average retention rate for all local bars has consistently ranged from 89%-92%. Local bars under 2,000 are seeing a slightly upward trend from 89% in 2007 to 92% in 2013.
- Voluntary state bars have historically had the highest retention rates reported in our surveys, but in 2013, all three groups had a rate of 92%.

![Bar Association Retention Rates 2007-2013](chart)

**LAPSED MEMBERS**

What are bars doing to bring back lapsed members? The percentage of voluntary state and local bars using email notices has not varied significantly from 2011 to 2013. However, voluntary state bars were more likely to use email notices (95% in 2013) than were local bars (78% in 2013). The percentages of bars using telemarketing dropped significantly from 2011 to 2013. The percentage of voluntary state bars using telemarketing dropped from 56% in 2011 to 40% in 2013; local bars dropped from 22% in 2011 to 15% in 2013. About half (53%) of local bars and 40% of voluntary state bars use peer contact by board members.

**MEMBERSHIP GROWTH**

In the 2013 MAF, 70% of all voluntary state bars report that their membership had either stayed the same or increased, down from 80% in 2011. 77% of all local bars reported that the membership had either stayed the same or increased, a slight decrease from the 80% reported in 2011.

No state bars and only 2% of local bars reported that their membership declined more than 5% in either 2011 or 2013.

Below are comparisons from 2011-2013 showing the percentages of increases and decreases reported:
<table>
<thead>
<tr>
<th></th>
<th>Stayed about the same</th>
<th>Grew 1%-5%</th>
<th>Grew 6%-10%</th>
<th>Grew 11%-20%</th>
<th>Declined 1%-5%</th>
<th>Declined 6%-10%</th>
<th>Declined 11%-20%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unified state bars</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>12%</td>
<td>85%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>2013</td>
<td>9%</td>
<td>88%</td>
<td>0%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Voluntary state bars</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>30%</td>
<td>45%</td>
<td>5%</td>
<td>0%</td>
<td>20%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>2013</td>
<td>35%</td>
<td>35%</td>
<td>0%</td>
<td>0%</td>
<td>30%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Local bars over 2,000</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>33%</td>
<td>33%</td>
<td>6%</td>
<td>4%</td>
<td>21%</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>2013</td>
<td>42%</td>
<td>27%</td>
<td>2%</td>
<td>2%</td>
<td>27%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Local bars under 2,000</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>55%</td>
<td>26%</td>
<td>3%</td>
<td>0%</td>
<td>11%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>2013</td>
<td>57%</td>
<td>16%</td>
<td>4%</td>
<td>3%</td>
<td>16%</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>

**OVERALL MEMBERSHIP GROWTH 2011-2013**

![Bar chart showing membership growth](chart.png)
Increased
Stayed the same
Decreased

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Increased
Stayed the same
Decreased

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Increased
Stayed the same
Decreased

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
DUES LEVELS/COLLECTION METHODS

DUES DISCOUNTS/WAIVERS

Data on reduced or dues waivers based on financial resources or hardships has been collected since 2007. The following lists the percentages of responding bars providing reduced dues or dues waivers from 2007-2013.

| Percent offering reduced dues or dues waivers based on financial resources of member |
|-----------------------------------------------|---------------|
| Unified state bars                           |               |
| 2007                                          | 23%           |
| 2009                                          | 16%           |
| 2010                                          | 21%           |
| 2011                                          | 21%           |
| 2013                                          | 21%           |
| Voluntary state bars                         |               |
| 2007                                          | 68%           |
| 2009                                          | 75%           |
| 2010                                          | 67%           |
| 2011                                          | 68%           |
| 2013                                          | 65%           |
| Local bars over 2,000                        |               |
| 2007                                          | 33%           |
| 2009                                          | 43%           |
| 2010                                          | 37%           |
| 2011                                          | 47%           |
| 2013                                          | 48%           |
| Local bars under 2,000                       |               |
| 2007                                          | 17%           |
| 2009                                          | 18%           |
| 2010                                          | 12%           |
| 2011                                          | 26%           |
| 2013                                          | 32%           |

Voluntary state bars are the most likely to offer reduced dues or dues waivers based on financial resources, although local bars (both over 2,000 and under 2,000 members) saw the biggest jump in the percentage of bars offering discounts or waivers from 2007 to 2011.

COMBINED DUES PROGRAMS

We first asked in the 2011 MAF whether voluntary state and local bar associations had a membership partnership or combined dues program with any other bar association (i.e., if a member belongs to another bar association, his/her dues are reduced). Voluntary state bars having such a program rose slightly from 6% in 2011 to 10% in 2013. Nineteen percent of local bars reported having a combined dues program in both 2011 and 2013.
According to the data reported in the 2011 and 2013 MAF’s, half of voluntary state bars increased their dues in 2011 and in 2013. More local bars increased their dues in 2013 than in 2011. The average percent of dues increase across all categories generally is between 7%-11%.

About 3% of unified state bars, 20% of voluntary state bars and 4% of local bars indicated they have a regularly scheduled dues increase (i.e., 2% every other year). These figures have not changed significantly since 2011.

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1 One unified state bar increased dues 100%.
# DUES LEVELS AND TRENDS

## AVERAGE TOP DUES LEVELS – VOLUNTARY STATE BAR ASSOCIATIONS

### VOLUNTARY STATE BARS (1983-2009)

<table>
<thead>
<tr>
<th>Year</th>
<th>Voluntary state bars 15,000+</th>
<th>Voluntary state bars 5,000-14,999</th>
<th>Voluntary state bars under 5,000</th>
<th>ALL VOLUNTARY STATE BARS</th>
<th>CHANGE FROM PREVIOUS REPORTING PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>$116</td>
<td>$90</td>
<td>$84</td>
<td>$92</td>
<td>n/a</td>
</tr>
<tr>
<td>1987</td>
<td>$155</td>
<td>$108</td>
<td>$90</td>
<td>$119</td>
<td>+29%</td>
</tr>
<tr>
<td>1991</td>
<td>$182</td>
<td>$137</td>
<td>$111</td>
<td>$142</td>
<td>+19%</td>
</tr>
<tr>
<td>1994</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$153</td>
<td>+8%</td>
</tr>
<tr>
<td>1996</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$157</td>
<td>+3%</td>
</tr>
<tr>
<td>1999</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$167</td>
<td>+6%</td>
</tr>
<tr>
<td>2000</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$175</td>
<td>+5%</td>
</tr>
<tr>
<td>2001</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$175</td>
<td>Same</td>
</tr>
<tr>
<td>2002</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$187</td>
<td>+7%</td>
</tr>
<tr>
<td>2003</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$199</td>
<td>+6%</td>
</tr>
<tr>
<td>2004</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$205</td>
<td>+3%</td>
</tr>
<tr>
<td>2005</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$211</td>
<td>+3%</td>
</tr>
<tr>
<td>2007</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$233</td>
<td>+10%</td>
</tr>
<tr>
<td>2009</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>$227</td>
<td>-3%</td>
</tr>
</tbody>
</table>

### VOLUNTARY STATE BARS (2010-2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Voluntary state bars 20,000+</th>
<th>Voluntary state bars 10,000-19,999</th>
<th>Voluntary state bars under 10,000</th>
<th>ALL VOLUNTARY STATE BARS</th>
<th>CHANGE FROM PREVIOUS REPORTING PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$243</td>
<td>$265</td>
<td>$214</td>
<td>$238</td>
<td>+5%</td>
</tr>
<tr>
<td>2011</td>
<td>$262</td>
<td>$268</td>
<td>$215</td>
<td>$243</td>
<td>+2%</td>
</tr>
<tr>
<td>2013</td>
<td>$269</td>
<td>$278</td>
<td>$245</td>
<td>$264</td>
<td>+8%</td>
</tr>
</tbody>
</table>

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2 Average dues levels for bar associations were not calculated in membership size categories in all publications. In these cases the dues level for each size category is indicated by “n/a” and only the average top dues level for all voluntary state or local bars is provided.

3 Only 18 voluntary state bars responded to the 2007 State and Local Bar Dues Survey.

4 The membership size breakdowns were adjusted beginning with the 2010 State and Local Bar Administration Finance Survey.
AVERAGE TOP DUES LEVELS – LOCAL BAR ASSOCIATIONS

LOCAL BARS (1983-2009)

<table>
<thead>
<tr>
<th>Year</th>
<th>Local bars 2,000+</th>
<th>Local bars under 2,000</th>
<th>ALL LOCAL BARS</th>
<th>CHANGE FROM PREVIOUS REPORTING PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>$105</td>
<td>$69</td>
<td>$84</td>
<td>n/a</td>
</tr>
<tr>
<td>1987</td>
<td>$123</td>
<td>$82</td>
<td>$94</td>
<td>+12%</td>
</tr>
<tr>
<td>1991</td>
<td>$143</td>
<td>$99</td>
<td>$128</td>
<td>+36%</td>
</tr>
<tr>
<td>1994</td>
<td>n/a</td>
<td>n/a</td>
<td>$155</td>
<td>+21%</td>
</tr>
<tr>
<td>1996</td>
<td>n/a</td>
<td>n/a</td>
<td>$162</td>
<td>+5%</td>
</tr>
<tr>
<td>1999</td>
<td>n/a</td>
<td>n/a</td>
<td>$159</td>
<td>-2%</td>
</tr>
<tr>
<td>2000</td>
<td>$174</td>
<td>$124</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2001</td>
<td>$164</td>
<td>$110</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2002</td>
<td>$174</td>
<td>$125</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2003</td>
<td>$180</td>
<td>$134</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2004</td>
<td>$183</td>
<td>$133</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2005</td>
<td>$186</td>
<td>$147</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2007</td>
<td>$211</td>
<td>$152</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2009</td>
<td>$212</td>
<td>$164</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>2010</td>
<td>$210</td>
<td>$155</td>
<td>$180</td>
<td>+13%</td>
</tr>
<tr>
<td>2011</td>
<td>$216</td>
<td>$158</td>
<td>$180</td>
<td>Same</td>
</tr>
<tr>
<td>2013</td>
<td>$217</td>
<td>$165</td>
<td>$186</td>
<td>+3%</td>
</tr>
</tbody>
</table>

Note that the number of responding local bars varies significantly each year, which may account for the variances in dues levels. See Appendix A for the number of respondents.
DUES COLLECTION METHODS

Prorated dues – 70% of voluntary state bars (up from 63% in 2011) and 64% of local bars (same as 2011) prorate dues for new members.

Automatic debit – The percent of bars reporting that they use automatic debits to members’ credit cards for dues collection has declined since 2011. 15% of voluntary state bars (down from 21% in 2011) and 2% of local bars (down from 6% in 2011) indicated they used automatic debits for dues collection.

Opt-out debit – The percent of bars using opt-out debit (automatically charging members’ credit card for dues renewal, but giving the option to opt-out) has remained about the same since 2011 (11% of voluntary state bars and 2% of local bars).

Periodic payments – The percent of bars giving members the option to pay dues using periodic payments (i.e., monthly, quarterly, etc.) has increased slightly since 2011. In 2013 6% of unified state bars (none in 2011), 35% of voluntary state bars (26% in 2011), and 25% of local bars (20%) in 2011 allow members to use periodic payments.

DUES STRUCTURE/PRICING TRENDS

Bar associations are including incentives such as free or reduced CLE, regular member luncheons and journal or newsletter subscriptions in their basic dues packages at an increasing rate. We first asked about these incentives in the 2011 MAF. Below are comparisons of the percentages of bars offering free or reduced CLE, regular membership luncheons, and bar journal or newsletter subscription from 2011-2013.

The number of bars offering free CLE as part of the basic dues package has increased significantly since 2011, particularly in state bar associations. The average number of free hours offered is 7.5 for unified state bars, 8.9 for voluntary state bars and 11.9 for all local bars.
Similarly, the number of bars offering reduced-fee CLE to members has increased, although not as a high a rate as free CLE.

In 2013, all state bars (unified and voluntary) indicated they included the bar journal or newsletter as a part of membership, up from 94% of unified state bars and 89% of voluntary state bars in 2011.

In both 2011 and 2013, very few state bar associations indicated they offered regular membership luncheons as a part of their regular dues, most likely due to the disbursement of members throughout the state. About one-third of all local bars offer membership luncheons.

In 2013 we asked if online legal research, social/networking events and the bar directory were included in the basic dues package. Below are the percentages for each.

State bars are more like to offer online legal research and local bars are most likely to offer social/networking events.
The Division for Bar Services began collecting information on the percentage of income derived from sources other than dues in 1991. The charts below depict the average percentages for each category.

### UNIFIED STATE BARS (1991-2009)

<table>
<thead>
<tr>
<th>Year</th>
<th>Unified state bars 15,000+</th>
<th>Unified state bars 5,000-14,999</th>
<th>Unified state bars under 5,000</th>
<th>ALL UNIFIED STATE BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>35%</td>
<td>34%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>1995</td>
<td>35%</td>
<td>39%</td>
<td>37%</td>
<td>37%</td>
</tr>
<tr>
<td>1998</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>39%</td>
</tr>
<tr>
<td>2001</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>39%</td>
</tr>
<tr>
<td>2005</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>36%</td>
</tr>
<tr>
<td>2006</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>40%</td>
</tr>
<tr>
<td>2007</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>38%</td>
</tr>
<tr>
<td>2009</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>36%</td>
</tr>
</tbody>
</table>

### UNIFIED STATE BARS (2011-2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Unified state bars 50,000+</th>
<th>Unified state bars 20,000-49,999</th>
<th>Unified state bars 10,000-19,999</th>
<th>Unified state bars 5,000-9,999</th>
<th>Unified state bars under 5,000</th>
<th>ALL UNIFIED STATE BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>32%</td>
<td>33%</td>
<td>33%</td>
<td>40%</td>
<td>38%</td>
<td>36%</td>
</tr>
<tr>
<td>2013</td>
<td>35%</td>
<td>34%</td>
<td>32%</td>
<td>42%</td>
<td>35%</td>
<td>36%</td>
</tr>
</tbody>
</table>

The average percent of income derived from sources other than dues for unified state bars has remained stable since 1991 at 36%. The highest percent (40%) was reported in 2006.

### VOLUNTARY STATE BARS (1991-2009)

<table>
<thead>
<tr>
<th>Year</th>
<th>Voluntary state bars 15,000+</th>
<th>Voluntary state bars 5,000-14,999</th>
<th>Voluntary state bars under 5,000</th>
<th>ALL VOLUNTARY STATE BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>31%</td>
<td>46%</td>
<td>50%</td>
<td>43%</td>
</tr>
<tr>
<td>1995</td>
<td>36%</td>
<td>45%</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>1998</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>47%</td>
</tr>
<tr>
<td>2001</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>50%</td>
</tr>
<tr>
<td>2005</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>43%</td>
</tr>
<tr>
<td>2006</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>43%</td>
</tr>
<tr>
<td>2007</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>43%</td>
</tr>
<tr>
<td>2009</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>44%</td>
</tr>
</tbody>
</table>

---

6 Please note that membership in unified state bars is mandatory in order to practice law in that state. Therefore, nondues revenue tends to be less in unified state bars than in voluntary state and local bars since a large portion of revenue is derived from mandatory dues and licensing fees.

7 The membership size breakdowns were adjusted beginning with the 2010 State and Local Bar Administration Finance Survey.
### VOLUNTARY STATE BARS (2011-2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Voluntary state bars 20,000+</th>
<th>Voluntary state bars 10,000-19,999</th>
<th>Voluntary state bars under 10,000</th>
<th>ALL VOLUNTARY STATE BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>41%</td>
<td>61%</td>
<td>52%</td>
<td>43%</td>
</tr>
<tr>
<td>2013</td>
<td>41%</td>
<td>42%</td>
<td>53%</td>
<td>46%</td>
</tr>
</tbody>
</table>

The average percent of income derived from sources other than dues for voluntary state bars is somewhat higher than unified state bars, as to be expected. It is slightly higher in 2013 (46%) than reported in 1991 (43%).

### LOCAL BARS (1991-1995)

<table>
<thead>
<tr>
<th>Year</th>
<th>Local bars 3,500+</th>
<th>Local bars 2,000-3,499</th>
<th>Local bars 1,000-1,999</th>
<th>Local bars 500-999</th>
<th>Local bars under 300-499</th>
<th>ALL LOCAL BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1991</td>
<td>48%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>1995</td>
<td>51%</td>
<td>48%</td>
<td>43%</td>
<td>46%</td>
<td>35%</td>
<td>45%</td>
</tr>
</tbody>
</table>

### LOCAL BARS (1998-2009)

<table>
<thead>
<tr>
<th>Year</th>
<th>Local bars 2,000+</th>
<th>Local bars under 2,000</th>
<th>ALL LOCAL BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998</td>
<td>51%</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>2001</td>
<td>53%</td>
<td>52%</td>
<td>53%</td>
</tr>
<tr>
<td>2005</td>
<td>51%</td>
<td>49%</td>
<td>50%</td>
</tr>
<tr>
<td>2006</td>
<td>57%</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>2007</td>
<td>57%</td>
<td>45%</td>
<td>49%</td>
</tr>
<tr>
<td>2009</td>
<td>54%</td>
<td>53%</td>
<td>44%</td>
</tr>
</tbody>
</table>

### LOCAL BARS (2011-2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Local bars 8,500+</th>
<th>Local bars 4,000-8,499</th>
<th>Local bars 1,700-3,999</th>
<th>Local bars 700-1,699</th>
<th>Local bars under 700</th>
<th>ALL LOCAL BARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>39%</td>
<td>60%</td>
<td>48%</td>
<td>50%</td>
<td>43%</td>
<td>49%</td>
</tr>
<tr>
<td>2013</td>
<td>48%</td>
<td>57%</td>
<td>49%</td>
<td>51%</td>
<td>45%</td>
<td>51%</td>
</tr>
</tbody>
</table>

The average percent of income derived from sources other than dues for local bars is significantly higher (51%) in 2013 than it was in 1991 (42%).

---

8 The membership size breakdowns for local bars were changed beginning with the 1998 Bar Activities Inventory and again in the 2011 State and Local Bar Membership, Administration and Finance Survey.
MEMBER BENEFITS

The charts and summaries that follow depict a comparison of state and local bars offering various insurance programs and other member benefits. The most frequently offered programs and those with the most variance in bar associations offering from 2010-2013 are highlighted in the charts.

UNIFIED STATE BARS

Other unified state bar insurance programs: | 2010 | 2013 |
--- | --- | --- |
Accidental death | 33% | 27% |
Auto | 36% | 36% |
Dental | 33% | 30% |
Homeowners | 27% | 27% |
Vision care | 18% | 15% |
Workers’ compensation | 15% | 12% |
Business | 24% | 24% |

Life, professional liability, and disability insurance programs were offered by significantly more unified state bars in 2013 than in 2010. Accidental death, dental, vision care, workers’ compensation and health insurance were offered by fewer unified state bars in 2013 than in 2010.
Almost all (94%) of unified state bars now offer online legal research, up from 82% in 2010. The number of unified state bars offering Job placement services for nonlawyer personnel (paralegals, legal administrators) decreased, however the number offering job placement services for lawyers remained the same at 36%.
The percentages of voluntary state bars offering most insurance programs did not vary significantly from 2010-2013, except for business and auto insurance, both increasing by 12%. The percentages of voluntary state bars offering accidental death, long-term care and disability insurance showed the biggest decreases.
Table: Other voluntary state bar member benefits

<table>
<thead>
<tr>
<th>Service</th>
<th>2010</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio/video and/or web conferencing</td>
<td>52%</td>
<td>40%</td>
</tr>
<tr>
<td>Dispute resolution services</td>
<td>24%</td>
<td>35%</td>
</tr>
<tr>
<td>Legal career center</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td>Technology center or computer room for members use</td>
<td>15%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Similar to unified state bar associations, the percentage of voluntary state bars with nonlawyer placement services declined from 2010-2013, however voluntary state bars offering job placement services for lawyers increased from 29% to 36%. Those offering solo/small firm services increased significantly from 38% in 2010 to 65% in 2013.
The percent of local bars with 2,000+ offering each type of insurance program as a member benefit increased from 2010-2013. The biggest increases were in long-term care (15%), health (12%), accidental death (11%), and dental (11%).
Contrary to both unified and voluntary state bars, the percentage of local bars with 2,000+ members offering job placement services to nonlawyer legal professionals and legal administrators increased from 2010-2013. Over half now offer job placement services for lawyers.
LOCAL BARS UNDER 2,000 MEMBERS
Except for health insurance (9% in 2010; 13% in 2013) and disability insurance (10% in 2010; 9% in 2013), less than 10% of local bars under 2,000 members indicated they offer any insurance programs as a member benefit.

Other member benefits, including audio/video and/or web conferencing, a legal career center, technology training, and an ethics hotline were offered by less than 10% of local bars under 2,000 members. Services for solo/small firm members increased from 5% in 2010 to 10% in 2013. The most frequently offered member benefit is client meeting space.
THE MEMBERS SPEAK...

The Division for Bar Services has conducted over 45 state and local bar membership surveys since 2005, both in conjunction with strategic planning sessions and as a standalone service. The surveys have been tailored to obtain member feedback specific to each bar association. However, there are some commonalities in the areas of questions we ask, including concerns, issues of importance members feel the bar should address and communications.

As a whole, bar members appear to value the intangible benefits the bar provides, such as fostering a positive image of the profession and providing networking opportunities more than the tangible benefits such as product and service discounts and social events. These findings have remained fairly consistent in the surveys DBS has conducted since 2005.

Fostering a positive image for the profession or promoting the reputation of the legal profession is rated within the top three most important bar functions in virtually all surveys. In later surveys (2009 and beyond) keeping members informed and up to date on legal issues and changes in the law frequently appear in the top three most important functions as well.

The functions bar members tend to rate as least important are providing opportunities for community service (local bar members value this more highly than state bar and large local bar members), assistance with development of leadership skills and advocating on issues of concern.

According to our surveys, member concerns have shifted slightly since 2005 when maintaining a work/life balance was frequently cited as one of the top three concerns of members. Providing good client service with limited resources became a prominent concern beginning with the 2009 surveys. Keeping current and keeping up with changes in the law has emerged as a top concern in later years.

In a number of surveys we asked members to rate the value they receive for their dues dollar on a scale of 1-5 with 5 being very satisfied with the value to 1 being not at all satisfied. Those scores have ranged from 2.88 – 4.24 with an average rating of 3.81.

Despite the assumption that consumers are inundated with information, bar members generally feel that the frequency of communications from their bar associations are “just right.” Most of our earlier survey findings indicated that at least 85% of members feel the bar sends an adequate number of communications of all types (email, publications, etc.). That percentage has been trending upwards with most surveys conducted since 2010 showing at least 90% of members feel communications are adequate. Consistently since 2005, members have said they prefer email as the primary form of information sharing from the bar association. Many prefer weekly email updates such as enewsletters. It appears that members prefer information be sent to them rather than having to actively pursue it by visiting a website or social media outlet. Information sharing via social media and the bars’ websites are rated the least preferred method in almost every survey we have conducted indicating that members have not embraced social media as a tool to gather and share professional information.

Some other common themes that have emerged from member surveys include the following:

- Members want information tailored to their needs/interests. One size fits all is not as effective. They will be more likely to pay attention if the message is valuable to them.
- Similarly, members want more segmented benefits and services. They want the bar to focus on the particular needs of government attorneys, solo/small firm practitioners, etc.
APPENDIX A – REFERENCED PUBLICATIONS

A variety of publications were referenced in this report. The ABA Division for Bar Services published its first “Directory of Bar Associations (DBA)” in 1976. This edition included responses from over 500 bar associations, including over 200 with less than 100 members. Data on membership figures, staff size and budget were collected initially in the 1980 edition.

The DBA was expanded in 1987 and renamed the Bar Activities Inventory (BAI). In 1994 the Division published the inaugural State and Local Bar Association Membership Dues and Mandatory Fees Survey. This edition contained breakdowns of each bar’s dues levels by category of membership (length of membership, judiciary, government lawyers, etc.)

Generally, each voluntary and each unified state bar provided data for each survey. However, the number of local bar associations responding to each survey has varied widely from 1980-2013, accounting for some of the variances in the numbers. Please keep this caveat in mind when reviewing the local bar data throughout this report. A full listing of each publication referenced and the number of respondents in each category follows. Where possible, based on collection methods, local bar data was categorized by over 2,000 members or under 2,000 members throughout this report for more consistent comparisons.

1980 Directory of Bar Activities
Unified state bars – 33
Voluntary state bars – 23
Local bars 3,500 and more – 16
Local bars 2,000-3,499 – 17
Local bars 1,000-1,999 – 26
Local bars 500-999 – 43
Local bars 300-499 – 32

1983 Directory of Bar Activities
Unified state bars – 33
Voluntary state bars – 23
Local bars 3,500 and more – 19
Local bars 2,000-3,499 – 21
Local bars 1,000-1,999 – 26
Local bars 500-999 – 35
Local bars 300-499 – 22

1987 Bar Activities Inventory
Unified state bars – 33
Voluntary state bars – 23
Local bars 3,500 and more – 20
Local bars 2,000-3,499 – 24
Local bars 1,000-1,999 – 23
Local bars 500-999 – 35
Local bars 300-499 – 19

1991 Bar Activities Inventory
Unified state bars – 33
Voluntary state bars – 23
Local bars 3,500 and more – 24
Local bars 2,000-3,499 – 23
Local bars 1,000-1,999 – 39
Local bars 500-999 – 45
Local bars 300-499 – 25

1994 State and Local Bar Association Membership Dues and Mandatory Fees Survey
Unified state bars – 34
Voluntary state bars – 23
Local bars - 43

1995 Bar Activities Inventory
Unified state bars – 35
Voluntary state bars – 22
Local bars 3,500 and more – 24
Local bars 2,000-3,499 – 31
Local bars 1,000-1,999 – 28
Local bars 500-999 – 49
Local bars 300-499 – 18
1996 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 36
Voluntary state bars – 22
Local bars - 44

1998 Bar Activities Inventory
Unified state bars – 33
Voluntary state bars – 19
Local bars 2,000 and more – 51
Local bars under 2,000 – 60

1999 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 34
Voluntary state bars – 22
Local bars - 45

2000 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 34
Voluntary state bars – 22
Local bars - 127

2001 Bar Activities Inventory
Unified state bars – 26
Voluntary state bars – 18
Local bars 2,000 and more – 36
Local bars under 2,000 – 49

2001 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 33
Voluntary state bars - 22
Local bars 2,000 and more – 67
Local bars under 2,000 - 94

2002 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 33
Voluntary state bars - 22
Local bars 2,000 and more – 50
Local bars under 2,000 - 79

2003 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 33
Voluntary state bars - 22
Local bars 2,000 and more – 56
Local bars under 2,000 - 60

2004 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 33
Voluntary state bars - 22
Local bars 2,000 and more – 58
Local bars under 2,000 - 86

2005 Bar Activities Inventory
Unified state bars – 34
Voluntary state bars – 21
Local bars 2,000 and more – 53
Local bars under 2,000 – 59

2006 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 33
Voluntary state bars - 22
Local bars 2,000 and more – 62
Local bars under 2,000 - 44

2007 State and Local Bar Association
Membership Dues and Mandatory Fees Survey
Unified state bars – 35
Voluntary state bars - 22
Local bars 2,000 and more – 61
Local bars under 2,000 - 89

2009 Bar Activities Inventory
Unified state bars – 30
Voluntary state bars – 18
Local bars 2,000 and more – 45
Local bars under 2,000 – 65

2009 State and Local Bar Association
Dues, Fees and Member Benefits Survey
Unified state bars – 33
Voluntary state bars – 22
Local bars 2,000 and more – 58
Local bars under 2,000 - 66
2010 State and Local Bar Association
Dues, Fees and Member Benefits Survey
Unified state bars – 33
Voluntary state bars – 21
Local bars 2,000 and more – 66
Local bars under 2,000 - 77

2011 State and Local Bar Association
Membership, Administration and Finance
Survey
Unified state bars – 33
Voluntary state bars – 21
Local bars 2,000 and more – 66
Local bars under 2,000 – 77

2013 State and Local Bar Association
Membership, Administration and Finance
Survey
Unified state bars – 33
Voluntary state bars – 21
Local bars 2,000 and more – 46
Local bars under 2,000 - 69