

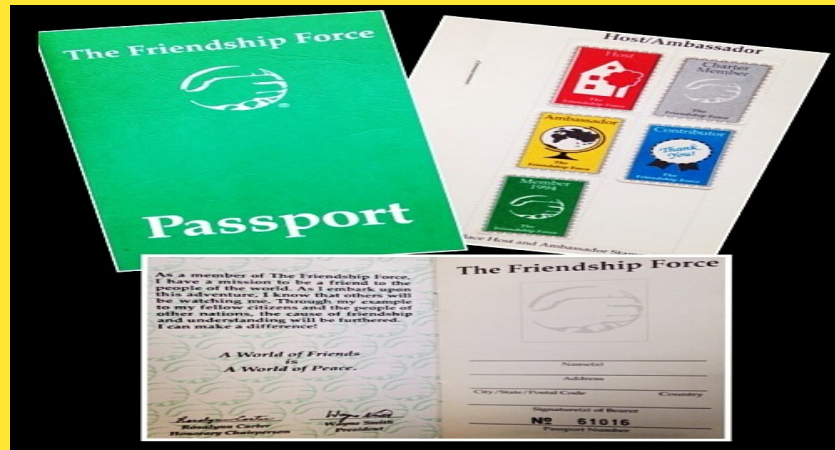


friendship force
INTERNATIONAL

GLOBAL MEMBERSHIP
SURVEY HIGHLIGHTS

Summer 2014

YOUR WORLD. YOUR CONTRIBUTIONS. YOUR FRIENDSHIP FORCE.



- 2015 will mark the 38th anniversary of the founding of the Friendship Force.
- This milestone is a testament to the enduring relevance of our mission to promote global understanding across the barriers that separate people.
- The work of the Friendship Force is even more important today than ever.



GLOBAL SURVEY RESULTS

SUMMER 2014



- Membership survey sent to **10846 members** worldwide, in **4 different languages**.
- Members from **249 clubs around the world** answered our survey.
- Our member respondents came from **42 countries**.
- The global club survey was sent to **421 Leaders**.
- 123 Clubs responded to the club survey.
- When asked if they would share their information with us so they could help our future efforts, **almost 800 people** gave us their email, phones and addresses. *Some even gave us their Skype ID's, and even their What's App codes.*





And while this wasn't all of our members and clubs who responded, **for the first time we have a very complete global picture of what the whole world membership and club network wants from their Friendship Force.**

It helped connect many dots for us.





Some of what we learned about our membership....

- More than 70% of our member respondents are women; 25%+ are male.
- The age range of our members is generally:
 - 18-34 = 1.12%
 - 35-55 = 4.66%
 - 56-75 = 76.9%
 - 76-96 = 17.33%
- 55% of our respondents have been members 1-10 years.
- Almost 12% of our respondents have been members 21-37 years.
- 8.27% of respondents have been members for 1 year or less.
- Of our respondents 70%+ were referred by a friend.
- 53.98% say they have a family membership to FF.
- 44.51% say they have an individual membership.



PHILOSOPHY

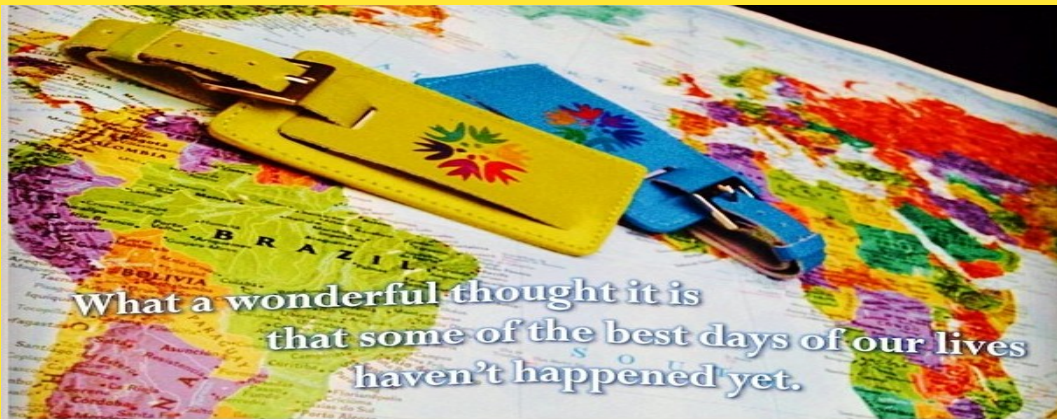


Almost 90% of respondents say they are part of Friendship Force because...

"Promoting global understanding across the barriers that separate peoples."

...is what they believe in.





Current members would participate MORE in FF programs if we offered:

- ***More destinations/cultures***
- ***Professional programs where I can learn something***
- ***A component of service to the local community***
- ***More flexibility in own travel schedule including activities / lodging on own***
- ***Lighter programs that make for less tiring visits***
- ***More adventure or physical activity***
- ***More focus on language learning***
- ***Home stays but shorter durations***
- ***Kids/family (grandparent exchanges, etc)***
- ***Hotel stays rather than home stays.***



How do people like to travel with Friendship Force?



- About 55% of our members travel with us each year; some up to 3 times; 37% travel only once with us a year.
- 2/3 of respondents travel both internationally and domestically.
- 1/3 of respondents would travel all year long, no matter what time of year.
- Approximately 83% of respondents said that they like the home stay component in various incarnations; about 15% said it is not their favorite part.
- 2-7 nights is ideal for most people as guests on a homestay exchange. 5-7 nights preferred.
- 1/4 of our member respondents have gone on an FF trip where they did not stay in a homestay situation.
- 2/3 of our members like exchanges to be beyond 2 weeks time in length.





What types of exchanges do people say they like?

- Top types of exchanges with current members in order of ranking: *Traditional club to club (25%), Global exchanges (19%), Themed exchanges (16%), Discover exchanges (10%), Cruises (7%), Adventure-active-outdoors (7%), Language learning exchanges (6%), Mystery exchanges (5%), Exchanges with family/kids (5%).*
- For 79.55% of respondents, an element of service is important to them; for up to 6 days but most 1-3 days; Topics being: *Education, Children's welfare, Woman's issues, Health and Wellness, Other, Housing, Poverty, Mentoring (young people/new clubs), Disaster Relief, Economic development, Hunger.*
- About 15% of our members want some kind of professional program exchanges, Topics being: *Teachers, Chefs, Social Workers, Farmers, Entrepreneurs, Technology, Journalists, Nurses, Engineers, Doctors, Real Estate Agents, Lawyers.*



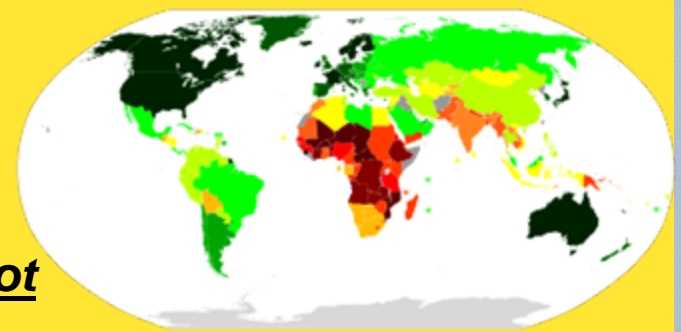
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- **93% of our members who responded have not taken a cruise with us, but 68% would be interested in doing so (or, travel such as....).**
- **About 1/2 of the respondents say they have not traveled with FF clubs other than their own, but 60% say they want to.**
- **When asked why they hadn't, 85% said they didn't know why they hadn't done so before.**
- **Of those members interested in learning a language, in order of importance: *Spanish, Other, French, German, English, Japanese, Portuguese, Chinese, Russian, Arabic, Turkish, Swahili.***
- **Of those members interested in doing something physical (35%), pref. *Hiking, Road Trips, Other, Cycling, Camping, Canoeing, Hot Air Ballooning, Snorkeling/Deep Sea Diving, Car driving, Golfing, Skiing, Mountain Climbing, Sky diving.***

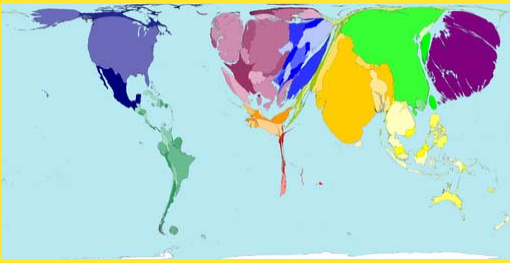


We Asked, “Is There A Place in the World You Haven’t Been to that you Want to Go with Friendship Force?”



People Answered - Yes (86.17%) No (13.83%) (Not in this order of % but expressed interest in travelling to these locations)

Afghanistan, Albania, Antarctica, Argentina, American Samoa, Australia, Austria, Aruba, Azerbaijan, Bahamas, Bangladesh, Belgium, Belize, Bermuda, Bhutan, Brazil, Bulgaria, Canada, Cape Verde, Central African Republic, Chile, China, Colombia, Congo, Cook Islands, Costa Rica, Croatia, Cuba, Cyprus, Czech Republic, Denmark, Ecuador, Egypt, Estonia, Ethiopia, Falkland Islands, Finland, France, French Polynesia, Germany, Ghana, Gibraltar, Greece, Guatemala, Haiti, Iceland, India, Indonesia, Iran, Ireland, Israel, Italy, Jamaica, Japan, Kazakhstan, Kenya, Luxembourg, Madagascar, Mali, Malta, Marshall Islands, Martinique, Mongolia, Morocco, Myanmar, Nepal, Netherlands, New Caledonia, New Zealand, Nicaragua, Norfolk Island, Norway, Panama, Papua New Guinea, Peru, Philippines, Poland, Portugal, Qatar, Romania, Russia, Saint Helena Island, Saint Vincent & The Grenadines, Samoa, Serbia, Seychelles, Singapore, South Africa, South Georgia and the South Sandwich Islands, South Korea, Spain, Sri Lanka, Sweden, Switzerland, Taiwan, Tanzania, Thailand, Turks and Caicos, Trinidad and Tobago, Turkey, Uganda, Ukraine, United Arab Emirates, United Kingdom, United States, Uruguay, US Virgin Islands, Uzbekistan, Vanuatu, Venezuela, Vietnam, Wallis and Futuna Islands, Western Sahara, Zambia, Zimbabwe.



Of these places, this is where FFI does not have clubs/destinations currently:

Asia: Afghanistan, Bangladesh, Bhutan, Philippines, Singapore

Southern Americas region: Antarctica, Falkland Islands, Saint Helena Island, South Georgia and the South Sandwich Islands, Wallis and Futuna Islands

South Pacific: American Samoa, Cook Islands, French Polynesia, Marshall Islands, Norfolk Island, Papua New Guinea, Samoa, Vanuatu

Caribbean: Aruba, Bahamas, Bermuda, Cuba, Haiti, Martinique, Saint Vincent & The Grenadines, Turks and Caicos, Trinidad and Tobago, US Virgin Islands, Saint Croix, Vieques, Saint Thomas, Tortola, Saint John, Virgin Gorda

Latin America: Belize, Ecuador, Guatemala, Nicaragua, Panama, Uruguay, Venezuela

Europe/Eurasia: Bulgaria, Croatia, Denmark, Finland, Gibraltar, Iceland, Ireland, Luxembourg, Malta, Poland, Portugal, Serbia, Spain, Iran, Kazakhstan

Africa/Middle East: Cape Verde, Central African Republic, Congo, Ethiopia, Madagascar, Mali, Seychelles, Western Sahara, Zambia, Zimbabwe. Qatar, United Arab Emirates

When We Asked About Hosting & Being A Club Member.....

- FF has an active membership of which 88.42% say they participate in both hosting and travelling.

- Most people currently host 5-7 nights, to 1 week; and 92% say 2-7 nights is ideal for them.

- Only about 1/3 of member respondents have hosted a mixed global inbound group; of those who did most enjoyed it; of those who didn't the travel arrangements and the effort involved was a factor in their not liking it.

- On Inbound hosting, the hosting itself and the welcome and farewell parties are what they enjoy doing most; 58% say they would do more of it with more assistance, more help, better compensation.

- 90%+ of respondents participate in local club activities; 8% say they do not know of or are not aware of any activities of their club.

- 80%+ of respondents are part of a club because of the social activities and like to participate in inbound and outbound exchange planning.





Technology, Social Media & Communications



- 99.25% of respondents own a computer; 92.63% have a cell phone; 54% have an Ipad or tablet and 80+% take them when they travel.
- People who take them on their trips use them all the time for many things: Call or email people at home, take pictures, contact other ambassadors and hosts on the exchange, help with travel (electronic check-in at airports, checking weather conditions, quick access to FFI website, etc), find local tourism information, use with social media.
- 77% say they use social media with Email being the most used (48.10%), 30% use Facebook, YouTube, Twitter, Instagram;
- 70% saying they use it several times a day or a few times a week; with 50+% saying they use it to communicate with family and friends or to follow organizations and issues they care about.
- 40% say they like to be kept directly informed about FFI by direct FFI emails,
- 30% of respondents want more information about exchanges and travel opportunities; more personal stories about FF experiences; member information about friends around the world, information about events & conferences, helpful resources & tools, information about weather & destinations, products & merchandise from FF, Leadership opportunities within FF.

OUR CHALLENGES

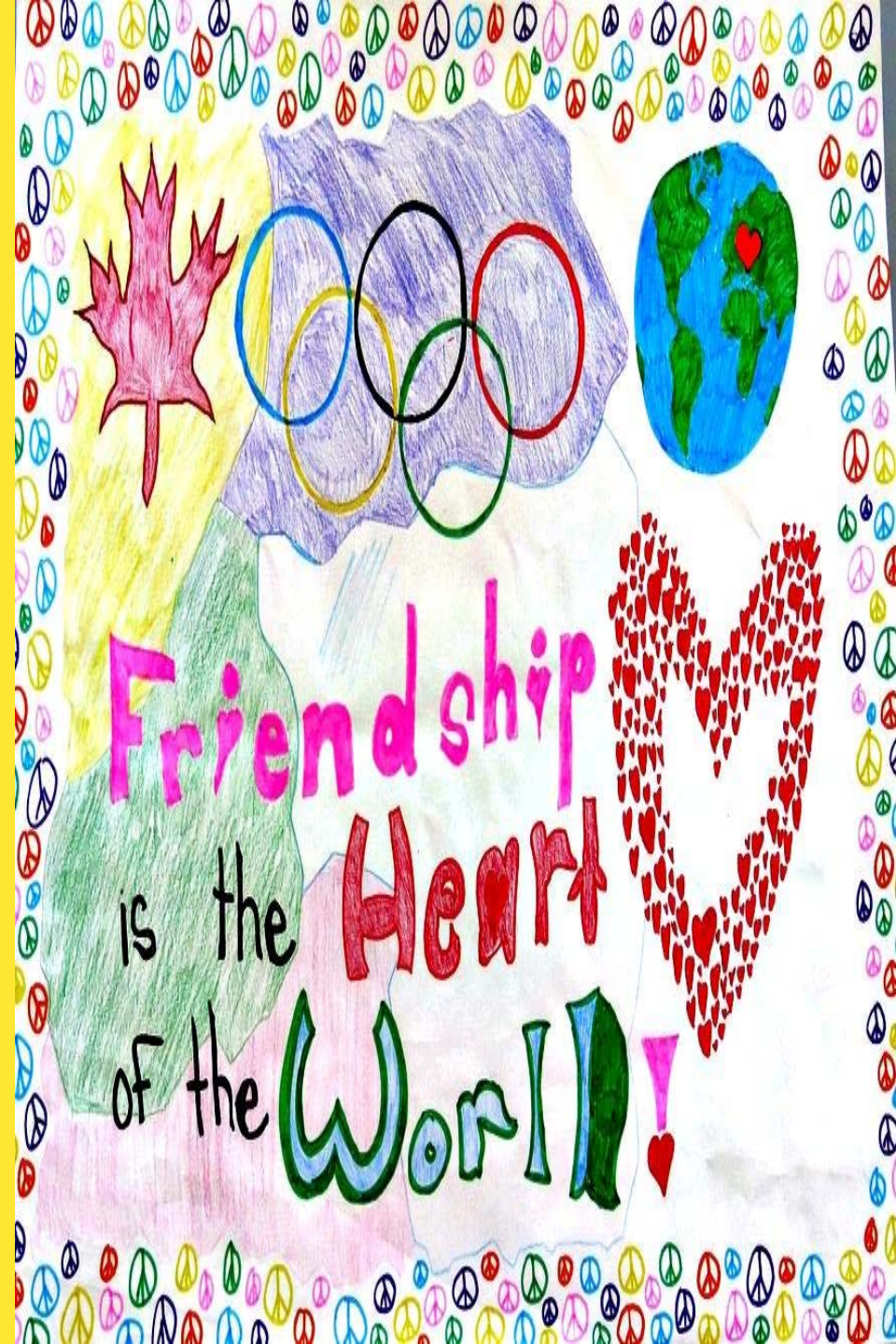


- 94% of members (survey respondents) are between ages 56-96. 6% are between ages 18-55.
- People are *mostly open to change*; not sure they want to lead it themselves.
- We are losing members to some trips with other organizations throughout the year.
- 2/3 + of our members are “slowing down” & want slower type exchanges.
- *A disconnected global network of clubs & members: Only 29% say they check in on Friendship Force websites/Facebook to see what other clubs & members are doing worldwide; 70% don't do this. 80% are interested or somewhat interested in connecting more.*
- 33% attend most meetings of their club & follow FF developments through their club; 24% are willing to help their club become more attractive to younger members.
- 84% of our clubs say their hosting capacity is steady or declining.
- 72% of our clubs can't stay within \$100 for a hosting program.
- 30% of our clubs have a hard time finding exchange directors.



GOOD NEWS!

- **75.5% of clubs say activities are well attended with consistent participation.**
- **81% say club activities are open to the public (social events, meals, activities to bring members together).**
- **66.5% of clubs say they would be willing to host a global inbound exchange.**
- **63% say their club will consider non-member travel participants as a means of filling under-subscribed exchanges.**
- **65% say their club actively seeks members who are in the workforce.**
- **55% say they are prepared to host families with children, if they know they are coming AHEAD of time.**
- **83% say their club is willing to host a more active, fun exchange program & a younger group of participants with a view to initiate a mixed group of adults.**





QUESTIONS?



For questions or comments, please do not hesitate to send us an email at:
support@friendshipforce.org

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