The Printing Industries Association of Australia: A Survey of Members' Challenges and Needs

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Since the 1980's, industrial relations structures and processes in Australia have been subject to significant changes, particularly in the direction of a greater focus upon productivity, flexibility and other issues at the workplace level. Australian employer associations have played an important role in these changes, often influencing if not leading the change process. Employer associations have themselves undergone significant changes in both their structure and functions in order to achieve needed change. Whilst many employer associations traditionally provided a broad range of services, their core activities were in the area of industrial relations. Indeed, their industrial relations activities defined them as employer associations within the meaning of relevant Acts and this article. However, a common feature of change which has occurred within employer associations in recent decades has been a shift to a greater emphasis upon the provision of broad business activities including advice on business analysis, marketing, technology and taxation advice.

In this article, the research findings of a survey conducted among members of the Printing Industries Association of Association (PIAA) concerning the challenges they face and what they seek from their Association are reported and analysed. The data shows that respondents to the survey, when asked to rate the importance to them of the various services provided by their Association, strongly *indicated the paramount importance to them of traditional industrial relations services. The implications of this data are that the expansion of employer association activities into a broader range of management services may not be in their best interests, particularly if it requires a shift of resources away from the traditional industrial relations services.*

INTRODUCTION

Employer associations are organisations 'consisting predominantly of employers and whose activities include participating in the determination of employment conditions on behalf of their members' (Plowman, 1982). Formal employer associations arose in response to threats that labour unions and state intervention appeared to pose for employers (Sheldon and Thornthwaite, 2002:1). Australian employer associations have traditionally provided a variety of services to their members in addition to industrial relations representation including political lobbying, public relations and business services including proformas and trade information, research assistance and advice, as well as training and education services (Plowman, 1982, Gladstone, 1984, Sheldon and Thornthwaite, 2002:1). However, the nature of Australian employer associations and the services provided by them has undergone significant change in recent decades.

The peak employer associations in Australia, the Business Council of Australia (BCA) and the Confederation of Australian Industry (CAI), were enthusiastic advocates of the decentralisation of industrial relations activity and the move towards more enterprise bargaining (ACCI, 1993: 8-9; BCA, 1989: 8; MacIntosh, 1993: 59-62; McLaughlin, 1991: 41-68). Such enthusiasm remains somewhat curious in light of their traditional central role under arbitration and their limited experience in the devolved processes advocated. Indeed, were 'employer associations consigning themselves to historical oblivion by advocating their present policies regarding the industrial relations system?' (Mortimer et al, 2002: 55). Australian employer associations have been viewed as traditionally reactive (Plowman, 1988). Perhaps they saw the move to enterprise bargaining as an inevitable trend and their support flowed from a reactive stance, without a clear strategy (Mortimer et al, 2002: 55). Certainly, by the mid-1990s it was clear that employer associations in Australia had a variety of different experiences associated with the systematic decentralisation of industrial relations and that while some had led the process, others had 'suffered them with varying degrees of difficulty' (Sheldon and Thornthwaite, 1999: ix). It has been argued that the trend away from multi-employer bargaining and the declining role of arbitration in Australia caused employer associations to think creatively about their futures (Sheldon and Thornthwaite, 1999:3).

During the 1980s and 1990s, many employer associations operating in Australia restructured, merged, adopted a broader range of services and sought to become more focused on a wider range of business concerns. Some became less membership based and more commercial by providing elective services on a 'customer' fee-paying basis. A survey conducted by Plowman and Rimmer for the Business Council of Australia (BCA) found that Australian employer associations had expanded their range of activities with deregulation (Plowman and Rimmer, 1992). The survey found that associations had expanded their activities and services in areas such as specialist and company specific services, training and lobbying for public policy changes and that many had introduced 'fee for service' activities (Plowman and Rimmer, 1992: 52-4). Whether such a change in focus supports a view of employer associations as reactive organisations or rather as more proactive and adaptive organisations that have been stimulated by the decentralisation of the system into developing a new strategic direction has been subject to some debate (Mortimer et al, 2002).

Although most of the literature dealing with the changing role of Australian employer associations has tended to associate their expansion of services with adaptation or reaction, Mortimer et al (2002) in their longitudinal study of several associations identified that a contraction of services could be an adaptive strategy. In particular, they note the case of the Australian Retailers Association (ARA) and conclude 'that a return to a traditional industrial relations focus by some associations represents a proactive response to membership needs' (Mortimer et al, 2002: 66).

In this article, the results of a survey conducted among members of the Printing Industries Association of Australia (PIAA) during 2003 are reported. The survey sought to identify the issues of concern to members and the relative importance to members of services provided or potentially provided by their Association. The survey followed the release in March 2001 of a comprehensive and significant report on the state of the Australian printing industry which was funded by the PIAA, an industry consortium and the Commonwealth Department of Industry, Science and Resources. The survey reported in this article was conducted by the author on behalf of the PIAA to assist the Association better understand and meet the needs of its members. The survey results provide useful insights to the key issues of concern to members of the PIAA and what they seek from their Association. The implications of these results for understanding the changing role of employer associations more generally is analysed.

Before considering the survey, it is useful to outline the nature of the printing industry in Australia and also provide some background about the PIAA. Not only is this background information important for understanding the context and meaning of the survey results, but it is also relevant for any assessment of the implications of these results for understanding employer associations more generally.

Nature of the Printing Industry and the Printing Industries' Association

Although printing is thought to have commenced in the first ten years of the Colony, associations of printing industry employers were not formed until almost one hundred years latter when the expansion of commerce and technical improvements caused the industry to grow to a significant size (Hunt, 1976: 1 and 5). The colonies of New South Wales (NSW) and Victoria experienced major changes as a result of the gold rushes of the 1850's including their populations tripling over a ten year period and 'printing presses followed the gold prospectors and trade organisation followed the presses' (Hagan, 1966: 23). Although both employer and employee associations were formed in the printing industry during the 1850's, the fate of these organisations was subject to the economy and they were generally short lived (Hagan, 1966: 28-9). During the decade between 1890 and 1990, the Australian economy enjoyed continuing expansion and in this environment unions thrived (Hagan, 1966: 53). From 1881, the NSW Typographical Association began to negotiate with individual owners and in 1884-5, during informal conferences with owners, the Union expressed a desire to deal with a representative body. An indication of the significance of the industry is provided by the size of the NSW Typographical Association which had over 1,000 members by 1892 (Hunt 1976: 61). In Victoria, the Melbourne Master Printers' Association was established in 1885 and in Sydney, the first meeting took place in December 1887 of a group that would become The Master Printers' Association of NSW (Hunt, 1976: 5). Although unionisation and a move towards collective bargaining influenced printing industry owners to come together, a desire to work together co-operatively to reduce cutthroat competition and under-cutting of prices was also very important (Hunt, 1976: 5).

A strong craft consciousness and pride mixed with a desire for mutual support and an esprit de corps has also been evident in the formation and continuance of the Association. Hunt argued that the 'crucial ingredient is people' in the formation of an association and that '... when the printing industry first formed its Association it was on a social plane and its first meeting was not held on a street corner nor a hall, but over a meal with refreshments (1976: 135) The importance of craft and tradition in the affairs of the printing industry employers' association has much in common with the experiences of the printing industry unions. As Hagan noted 'The British printers who formed the first typographical unions in Australia brought with them the standards, conventions, and myths that their trade had gathered over almost four centuries' (1966:1). Their interests in forming unions had more to do with 'preserving a privileged position for printing craftsmen in a rapidly changing age' and 'the restoration of the compositors' privileged position in a capitalist society' than in the overthrow of the capitalist society! (Hagan, 1966: 1-22). However, during the 1880's the printing industry unions shifted in their attitude towards the employers from being 'allies of fair employers against unfair competitors' to 'placing frank reliance on threat of strike against all employers' (Hagan, 1966: 53). This fundamental shift was reflected in the growing interest among printing businesses to join together.

The forces shaping the structure and strategies of both employer and employee associations in the printing industry have been quite well documented and frequently highlight the significance of technological change, economic factors and the expansion of the printing industry in response to growth in other industries (Hagan, 1966; Hunt, 1976). In the decades after the establishment of the Master Printers' Associations during the 1890s, many events and forces would help shape the purpose of collectivity among printing industry owners and employers including a strike of 1894, the establishment of a NSW Arbitration Court in 1902 and, with the formation of the Commonwealth of Australia, the issues of a Federal tariff and a Commonwealth system of arbitration (Hunt, 1976: 15-19). After the First World War, a number of pressures caused the printing industry to seek organisation throughout Australia at a federal level. The unions' achievement of a forty-four-hour week in 1921, fierce competition in the context of low tariff protection and the establishment of a federal award in 1925 motivated the various State based Master Printers' Associations to convene an Interstate Conference in 1921 which led to the formation of the Printing and Allied Trades Employers' Federated Association (PATEFA) in 1925 (Hunt, 1976: 33-5).

After World War II, on-going issues such as wages, awards, tariffs and undercutting of prices continued to shape the form and function of PATEFA as well as the division of responsibilities and influence between the federal body and the State based Associations. Other emerging issues such as technological innovations and the expansion of the industry further shaped both the federal and State based Associations causing them to expand their range of services into such areas as training. Although part of a federated association, the State bodies maintained their autonomy and, indeed, performed work the Federation was inadequately resourced to perform (Hunt, 1976: 99). The 1966 amalgamation of the two groups of unions in the printing industry to form the Printing and Kindred Industries' Union (PKIU) together with growing demands upon the services of the Federation provided a catalyst to the formation of a truly national employers' organisation (Hunt, 1976: 57,99-101). In 1971, the Printing and Allied Trades Employers' Federation of Australia (PATEFA) was formed with all moneys, properties and responsibilities held by the State Associations being passed to the national organisation and subject to its over-riding control (Hunt, 1976: 103-5)

In recent decades, PATEFA achieved membership eligibility rule changes which enabled the Association to represent employers within a broader sense of 'printing industry' and this expanded coverage was reflected in the name change to Printing Industries Association of Australia (PIAA) which became effective on the 1st January 1996. The PIAA Mission Statement is 'To be the catalyst for the prosperity of the print, packaging and visual communication industry in Australia' (PIAA, 2004). The PIAA membership eligibility rules, demonstrate the breadth of its coverage and provide that 'persons, firms, partnerships, companies, corporations, and unincorporated bodies engaged or employing any worker' in the printing industry including 'any trade industry business or undertaking in or allied with the business of letterpress printers lithographic printers and/or plate makers photo-engravers photogravure printers tinplate printers mesh stencil printers bookbinders manufacturing stationers paper rulers type setters stereotypers electrotypers cardboard box makers carton makers corrugated board and/or container makers fibre board container makers paper bag manufacturers toilet paper manufacturers paper pattern manufacturers paper and paper board processors printing ink makers and/or any other allied trade business or undertaking' (PIAA, 2002: Rules 5 and 6)

The PIAA provides a wide range of services to its members. In its Report to Members for 2003, the Association identified four key project areas through which it sought to achieve its overall objectives to meet the needs of its members and the industry: the implementation of Print21 imperatives, the development and implementation of needed services, the provision of timely information and the establishment of an influential relationship with key politicians and public sector bureaucrats (PIAA, 2004:9-14). Within these broad areas, the

Association identifies the specific importance of industrial relations services, including the Association's role in relations to the Safety Net Review and Working Hours Case before the Australian Industrial Relations Commission (AIRC), Award changes and enterprise bargaining activities. In its report for 2003, the Association also stressed its nation-wide investigation into the training needs of the industry, its industry benchmarking initiative and its emphasis on finding ways to help members increase the profitability of their business and to manage the changing business environment (PIAA, 2004:9-14).

In recent years, the printing industry in Australia has shrunk due to international competition and electronic technology including Computer to Plate (CTP). Financial and other pressures have caused many businesses to merge or amalgamate while many smaller businesses with four to five employees have closed down as profit margins reduced. There has also been a reduction in employee numbers due to both rationalisation and technical advancements. The PIAA has been impacted directly by declining employee numbers as this is the basis for their subscription calculation and the Association has sought to generate revenue from other sources such as training, seminars and major trade events. The PIAA membership numbers have fallen from a peak of 2 328 in 1996 to 1 947 in 2002 but strengthened to 2 089 members in 2003. During the same period, total income fell from $3.8m in 1996 to 3.4m in 2002 and to $3.5m in 2003. Although a profit was announced in 2003 of $47 446 compared with a deficit in 2002 of $358 036, the Association remains under considerable pressure as the industry continues to rationalise.

BACKGROUND TO THE SURVEY

The Printing Industries' Action Agenda, known as Print21 Action Agenda, was initiated by the Printing Industries Association of Australia (PIAA) and funded by the Commonwealth Department of Industry, Science and Resources with support from an industry consortium. Print21 was released in March 2001 and provided a strategic overview of Australia's printing industry including analysis of the state of the industry, the challenges it faces, future growth opportunities and major recommendations for achieving long term sustainable growth. The report and background papers identified the challenges facing businesses in the Australian printing industry including globalisation, falling profits, under-utilisation of technology and a decline in return on assets and provided business diagnostic tools aimed at assisting these businesses more effectively deal with the pressures facing them, including advice for strategic planning. The industry suffers from excess capacity and experienced a ten per cent downturn during 2002 (PIAA **78th Annual Report,** 2003: 5). The PIAA 'like many of its members, has had to weather this storm with a reduced income but a greater need to maintain its services for members needing specialist advice, support and representation' (PIAA **78th Annual Report,** 2003: 5)

The PIAA recognised that many of the challenges identified in Print21 could not be easily addressed in isolation by individual members and that the Association itself had a role to play in assisting member organisations. Senior staff of the PIAA believed that a survey of members was needed to identify their priorities and needs in order for the Association to respond appropriately. There was also concern that the process of identifying members' needs be conducted in such a way as to guarantee a degree of impartiality, as the credibility of results would be important not only in communications with members but also with external bodies including government. With this concern in mind, the Association sought an independent researcher and invited the author of this article to conduct a survey of members and to provide a report analysing the results. An advisory committee comprised of PIAA officers was formed to provide assistance and feedback on draft questionnaires and proposed methodology.

RESEARCH METHODOLOGY

The primary purpose of the research was to identify the relevance for Association members of the key challenges and issues identified in

Print21 and how members wanted their Association to assist them in relation to these matters. The report and background papers of Print21 were used to identify key areas that needed to be addressed in the proposed questionnaire. In drafting the survey questions, the Association's knowledge of its members' businesses was used to help shape categories and groupings used in the survey questions, such as those relating to size and business focus. The proposed survey questionnaire was reviewed by the advisory committee on several occasions and underwent a number of revisions until finally a two-part survey questionnaire was finalised.

Part A of the survey questionnaire consisted of sixteen questions aimed at identifying important information regarding members businesses and the challenges facing them. Part B consisted of eleven questions aimed at identifying members' information needs including the nature of the assistance sought by them from the Association and how they wished to receive this assistance. Most questions required respondents to indicate their response on a Likert scale of 1-7; '1' (representing 'to no extent' or not at all') through to '7' (representing 'extremely important' or 'significantly'). To assess whether an issue was either important or significant, a response of '4' was taken as neutral and responses of '5', '6' and '7' were summed. If more than 50 per cent of respondents indicated that a factor or issue was of a 5-7 value, it has been analysed to be significant.

The PIAA advisory committee recommended that only a sample of members be surveyed rather than the entire membership. Whilst cost was a consideration, it was also thought that a survey of all members was not necessary as an appropriate sample of members should generate a representative set of outcomes. There was also concern that members might be over-surveyed as the Association conducts regular statistical surveys of members' businesses. Given the preference for a sample survey, an important consideration was how to best ensure that a representative range of members' views were elicited. Of particular concern to the advisory committee was that the sample should include members across all States, all major industry segments and that it should be broadly representative of the varying sizes of members' businesses as these factors were thought likely to influence members needs and expectations of their Association. To help identify a representative range of respondents, Regional Managers of the PIAA were asked to identify 'at least five companies in each of the twelve sections of the printing industry, broken down into the following categories: large, medium and small'. The definition of size was that used by the Association in its other reports: small being less than twenty employees, Medium being twenty to ninety-nine employees and large being 100 plus employees. The selection of those to be surveyed by PIAA managers is likely to have caused some bias in the survey data and results, although the nature of such bias is not apparent.

A covering letter was prepared and signed by the PIAA's Chief Executive Officer Mr Gary Donnison in which members were informed about the purpose and methodology of the survey and urged to complete and return the questionnaire in the return paid envelope provided. Most importantly, the confidentially of responses was stressed and the methodology used to ensure this was explained. The return paid envelopes directed completed questionnaires to the independent researcher who would be responsible for the collation of the data and storage of the completed questionnaires.

In mid-May 2003, 270 survey questionnaires were posted to PIAA members from all States, across all identified sectors of the printing industry and of differing sizes in terms of the number of staff employed. The mail posting was followed up by the independent researcher through phone calls and emails to surveyed organisations. By mid-June, seventy-nine completed questionnaires had been returned representing a response rate of 29.25 per cent. The survey forms were coded and filed so as to protect the anonymity of respondents.

Overview of Survey Results

When the survey results were analysed according to the State from which respondents' businesses were based, no significant difference was found between the responses by State at a significance level of 0.05 and, therefore, the results are presented for all respondents nationally rather than by State. Presented here are the results of the survey concerning the profile of survey respondents including the nature of work performed by respondents and the size of their business in terms of turnover and number of employees, how respondents viewed the state or health of their business and the relative importance of services provided to them by the PIAA.

Profile of Survey Respondents

Respondents were spread throughout the identified industry sectors providing the range of identified products, processes and services. The largest identified sector was that of 'General Commercial Printing' (30.4%) and a total of 40.5 per cent of respondents identified that they did provide 'General Commercial Printing'; that is, although 30.4 per cent of respondents identified their businesses as 'best fitting' the 'general commercial printing' sector, a further 10.1 per cent of respondents identified that they did provide general commercial printing services.

Results also show that over 80 per cent of respondents employ less than fifty staff and that more than 50 per cent of respondents had an annual turnover of less than $3m in the last financial year (Q2 and 3 Part A). Respondents also operate across all of the States except Tasmania although the largest grouping of respondents came from South Australia (Q6 and 7 Part A). Although 86 per cent of respondents have their business located in an Australian capital city, over 77 per cent of respondents provide services for customers in regional areas and in other States (Q8 and 9 Part A).

Nature and Health of Business

The survey results concerning key aspects of business performance are generally consistent with the findings of Print21. In light of issues raised in Print21 concerning the challenges arising from e-business and globalisation, the high percentage of respondents identifying with 'general commercial printing' services could be seen as potentially problematic for the industry. Seventy-seven per cent of respondents stated that their business was totally focused on the domestic market (Q10 Part A) which also contrasts with the recommendations of Print21 concerning the need for Australian printing businesses to become export oriented (Q11 Part A). The majority of respondents did not identify with experiencing the nature of threats identified in Print21 and specified in the questionnaire nor were they engaged in activity aimed at securing niche or global markets through e-business, as recommended in Print21. However, consistent with the industry problems identified in Print21, a significant 60.8 per cent of respondents identified that they had made major investments over the past five years aimed at substantially changing and upgrading the nature of their infrastructure as well as considerable investments aimed at significantly updating existing technology (Q14 Part A). Ninety-five per cent of respondents indicated that that were utilising their technology at less than full capacity while 25 per cent of respondents indicated less than 75 per cent utilisation of capacity (Q15 Part A)

As identified in Print21 and its accompanying background papers, such expenditure on technology may be problematic for the industry. This notion is supported by the survey data concerning profitability, profit margin, return on assets and turnover is considered. The majority of respondents indicated overall that there had been no significant movement in any of these measures over the past five years except for turnover which had increased for a majority of respondents (Q13 Part A). This is consistent with the problems of excess capacity identified in the PIAA Annual Report (2003: 5).

What Respondents Want from their Association

Respondents were asked to rate on a scale of 1 (not at all important) to 7 (extremely important) the importance to them of a list of services provided by the PIAA (Q16 Part A). The cumulative importance (the percentage of 5-7 scores) of the services rated by respondents is shown in Table 1. The results indicate clearly that there are a number of services provided by the PIAA which the respondents rate as being very important to them. The results also show that while the more traditional association role of assisting members in employee and industrial relations matters remains of greatest importance to the respondents, the role of information provider is also extremely important.

Table 1 (AQ16): The Importance to You of the Following Services Provided by the Printing Industries Association

	Cumulative Importance (Total of 5-7 scores)
Assist in Employee and Industrial Relations	85%
Keep you informed	82%
Provide industry trend information	62%
Advise / assist / lobby govt grants	59%
Industry training representation to govt, others	52%
Advice and govt representation on environment services	48%
Training and professional development	38%
Provide taxation advice	23%

In Part B of the survey questionnaire, respondents were asked to indicate the importance for the future of their business of receiving quality information concerning a range of listed issues. The issues were organised into ten groupings and within each group were a number of specified issues. In Table 2 the highest ten mean scores for all issues are presented. This information is of considerable interest. Although the highest mean scores are associated with employment relations issues, it can be seen that taxation matters and issues concerned with market opportunities also scored very highly. In the context of other responses, this suggests that although respondents may perceive that they have not yet experienced the pressures forecast in Print21 they are nevertheless concerned to be informed about these issues.

Table 2: Top Ten Mean Scores Re Information Needs (Part B Q1-10)

Legal requirements regarding employment conditions	5.95
Occupational Health and Safety Legislation	5.82
Termination of Employment and Unfair Dismissal issues	5.81
Workers Compensation Laws	5.62
GST and Personal income tax rates	5.33
Survey data on industry conditions and wage movements	5.22
Size and growth in markets and sectors	5.16
Further corporate tax reform	5.15
Evolving print and media markets (changing dynamics)	5.06
Identification of emerging opportunities (onshore and offshore)	5.00

It is apparent from the survey responses that the information processing role of the PIAA is of considerable importance to respondents. The results shown in Table 3 present the cumulative importance ratings (the percentage of 5-7 scores) for workplace relations issues surveyed. They illustrate survey participants' perception of the importance to the future of their business of receiving quality information concerning various workplace relations issues.

Table 3: Workplace Relations Issues (Q1 Part B). The following percentage of respondents identified that information on these issues was important to the future of their organisation (for example, rated 5-7):

Legal requirements/employee conditions	87%
OHS Legislation	85%
Termination/dismissal	85%
Workers compensation laws	82%
Workforce education/training	67%
EEO and Anti-Discrimination matters	63%
Sexual Harassment issues	63%
Employer funded protection of worker entitlements	62%
Availability of Training	58%
Succession Planning	55%
Customer focus and service training	53%
Education and training for self	52%
Computer based training	48%
Older employees in workforce issues	44%

Only information on workplace relations issues were rated 5-7 on the 7-point likert scale by more than 75 per cent (approx.) of respondents. However, the survey results also showed the importance to respondents of receiving information in a range of areas other than employment relations. The following data represents the highest percentage ratings by respondents (that is, the percentage of respondents that rated issues 5-7 on the 7-point likert scale) across all information areas identified in the survey: GST and personal income tax rates 75.9 per cent; corporate tax reform 73.4 per cent; size and growth in markets and sectors 72.2 per cent; Environment Protection Agency (EPA) for example, information on obligations under new environment legislation 69.6 per cent; developing new markets 68.4 per cent; E-Commerce security 65.8 per cent; and federal government industry policy 62 per cent; pressures to utilise environmental friendly alternatives for example, reduction in green house gases; inks / chemicals / solvent usage; waste minimisation / recycling 58.3 per cent.

CONCLUSIONS

The early printing industry employer associations were formed from a range of pressures, which today appear quite limited and easily identifiable. The growth of unions and their demands, the establishment by government of arbitration machinery and the threat of cost-cutting, particularly from 'servants' and others who established businesses together with a desire to socially bond compelled printing industry employers to band together. The true complexities of these formations, the personalities which caused some groupings to succeed while others failed, has become blurred in time. What is certain is that the movement to a separate and opposing body in opposition to employees was not easy. Master and servant in the printing industry were traditionally bound together, the one becoming the other. Economic, political and technological factors did, however, culminate in pressures from unions, arbitration and 'unfair' competitors that provided the rationale for printing industry employers to associate. Many employer associations in Australia were born out of similar pressures.

The survey results discussed in this article illustrate the growing complexity surrounding the purpose of employer associations. The survey results discussed in this article are based upon only seventy-nine responses and must therefore be viewed with some caution. Furthermore, the study suffers from the bias resulting from regional managers selecting which businesses would be surveyed, although their selection was based on clear criteria relating to size. Despite the limitations of the survey methodology, the findings concerning aspects of respondents' businesses demonstrate a consistency with the issues identified in Print21. The survey results indicate that major concerns identified in Print21 are indeed apparent in the survey results including survey respondents not focusing upon global and niche markets and the evidence that the majority of respondents are working harder to maintain profitability.

The survey results demonstrate that there is a range of services provided by the PIAA which are valued highly by their members but industrial relations or workplace relations concerns remain of paramount importance to members. These results may challenge the notion that changes in the Australian industrial relations system necessarily require employer associations adapting by expanding the range of services they provide. Although most of the literature dealing with the changing role of Australian employer associations has tended to associate their expansion of services with adaptation or reaction, Mortimer et al (2002) concluded that a focus on 'traditional' industrial issues may well represent a rational response to a current membership need, rather than a reactive stance. Certainly, the results of the PIAA membership survey indicate the importance for members of their Association's provision of industrial relations services. A tentative finding from this research is that the future survival of employer associations may well lie in their expanding their services not generally but rather particularly in the area of industrial relations. Future studies should aim at identifying more precisely what members understand as 'industrial relations' issues as it is likely that these now include what were more traditionally viewed as human resource management issues. The results of the survey suggest, but do not conclude, that areas of activity such as training and assistance in enterprise bargaining may be more in line with the expectations of members than activities in areas not so related to industrial relations such as marketing or finance.

The results of the PIAA survey illustrate the importance for employer associations of surveying their members to ascertain what is important for them. While employer associations may choose to adopt a leadership role in directing perceived needed change among their members, their own survival may depend more upon meeting the expectations of their members or at least engaging in a mixed strategy of modifying their own services whilst educating members to alter members' perceptions of their needs and the role of their Association.

As a final note, it is worthwhile considering that the impetus for the establishment and growth of printing industry employer associations came mainly from the forces of unions and compulsory arbitration and price competition. In recent decades, the membership of both unions and employer associations has declined across all sectors in the Australian economy and the compulsory conciliation and arbitration system has waned in significance. Yet, the survey results discussed in this article suggest that members view and value their Association in traditional terms associated with industrial relations services.

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