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ASSOCIATION BENCHMARKING REPORT

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ASSOCIATION SOLUTIONS
Devoted to building stronger associations

2023

ASSOCIATION BENCHMARKING REPORT

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ASSOCIATION BENCHMARKING REPORT

Naylor Association Solutions leads the industry in partnering with trade associations and professional societies across North America to help these organizations get the most out of their programs and offerings. For more than 50 years, Naylor has provided trade and professional associations tools for member and market engagement. *Association Adviser*, a Naylor publication, is a valuable resource to association professionals with content that covers topics including best practices in member engagement, career advancement, industry trends and event planning. As part of Naylor and *Association Adviser*'s commitment to the association community, we conduct one of the most comprehensive annual studies that focuses on the member engagement, communication, career strategic planning and non-dues revenue practices of membership organizations.

More than 4,000 senior leaders of North American trade associations, professional societies and association management companies have completed our online surveys over the past 12 years. During that time, we have found that respondents representing a mix of small, midsize and large organizations across more than 100 industries have a wide range of organizational challenges.

2011
Associations believed they were doing a better job of integrating their communications than they actually were.

2012-2013*
Associations greatly underestimated communication overload and clutter.

** The 2012-2013 benchmarking study was based on a single survey that started in late 2012 and finished in early 2013.*

2014
Associations that integrated their communications were more effectively engaging members.

2015
Social media frequency surpassed traditional online communication, and improvements were made in "cutting through the clutter" and targeting/segmentation.

2016
The inability to generate non-dues revenue from communications continued. The key driver: Associations were not leveraging technology to improve customization for member subgroups.

2017
For the first time in our study's history, the "inability to communicate member benefits effectively" eclipsed "combating information overload/cutting through the clutter" as the No. 1 communication challenge for associations.

2018
Podcasts, apps, webinars and private online communities showed double-digit increases in both perceived value and adoption. Legacy communications (live events, print magazines, member e-newsletters) remain atop the communication value chain.

2019
Improvements were made in the areas of producing video and mobile-friendly communications. Feelings of being understaffed improved slightly. However, associations lost ground in many of the communication challenges measured each year.

2020
The impact of the COVID-19 pandemic brought live events to a standstill. In response, webinars and podcasts gained significant traction, but the majority of associations expressed difficulty transforming live events to virtual ones. Respondents continued to struggle with communication clutter and the inability to target/segment communications.

2021
Virtual events continued to be a vital option for member learning and engagement. Video gained substantial traction, and e-newsletters and association websites also saw growth as communication vehicles. Legacy print channels, including member magazines and directories, showed a decline in perceived value for the first time in many years, yet social media usage increased.

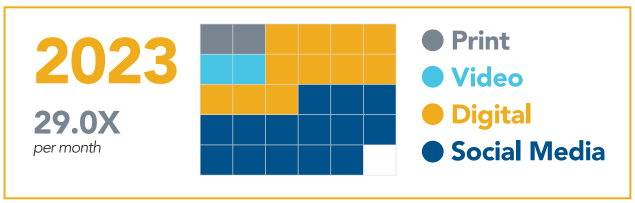
2022
The average number of monthly member touchpoints to members decreased for the first time since 2019, including a reduction in the frequency of social media and digital communications. For yet another year, live events remained the No. 1 channel for associations to engage with members, and webinars continued to be valued as associations navigate budget and travel-related challenges. Associations made gains in their ability to customize an engaging experience for different member types.

2023
For the first time in the survey's history, the challenge of generating non-dues revenue topped all other obstacles faced by associations. The value of traditional conferences, trade show and face-to-face events increased 10 percentage points from last year, ranking as the most valuable member engagement tool, while virtual events declined in popularity. Associations shifted away from social media when communicating with members, preferring to connect with members via direct email blasts and through the association's website. For the first time in years, more than half of associations feel they are staffed appropriately in most areas.

REPORT HIGHLIGHTS

This report reflects survey results from the Association Benchmarking Survey April 3 through May 7, 2023. The survey remains open year-round for association professionals who would like to participate – adding to the data set is good for enhancing the industry's body of knowledge. Participants are able to see a complete and accurate view of their association strategy and current performance by downloading their Best Practices Score Card.

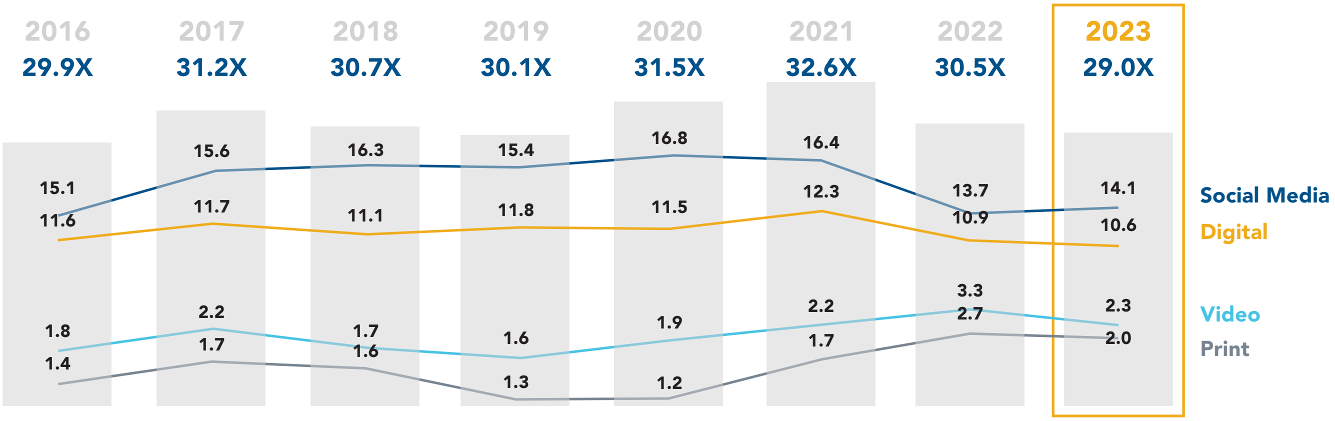
Riding on the trend of less is more, associations continued to reach out to members via print/digital/social media/video less frequently. Weighing in slightly less than last year, communication frequency dropped, but this can be explained by associations participating in more in-person events post-pandemic.



On average in 2023, associations engaged with members 29 times per month (via print, digital, social media and video), plus an additional six times per month via member surveys and online communities/forums. It should be noted that almost half indicated they connect with members through face-to-face events at least once a month, with one-third attending two to three events per month. Print communications frequency declined significantly this year, with more opting to correspond once per month (70%) instead of numerous occasions. An increase in the price of materials for printed magazines, directories, direct mail, etc., likely accounts for the drop in this type of communication. While social media is used more frequently per month to engage with members than other channels, many platforms have fallen in popularity with the exception of LinkedIn, which is up 8 percentage points this year. Popular platforms such as Facebook, Twitter and Instagram all declined in value to associations this year.

**Meta's Threads platform launched in July 2023, after this year's survey period, so was not included as an option.*

Average Monthly Communication Frequency by Channel



REPORT HIGHLIGHTS

As inflation continues to be a concern, associations indicated that generating non-dues revenue (58%) is the No. 1 challenge this year. Following closely behind, associations were also concerned about communicating member benefits effectively (56%) and engaging young professionals (54%). With an abundance of member engagement channels at their fingertips, it could become somewhat cumbersome in determining how best to communicate with a particular audience.

Generating non-dues revenue 58%

Communicating member benefits effectively 56%

Engaging young professionals 54%

This year marked a resurgence in face-to-face events, as association members are back full swing to traveling to in-person events. The event space is experiencing a renaissance of sorts with more than 9 in 10 ranking traditional conferences, trade shows and face-to-face events as the top valued member engagement tool, up 10 percentage points from last year and on par with the 2021 ranking, as people shared excitement at the initial post-pandemic return to normality. Virtual conferences and hybrid events fell in popularity, dropping more than 7 percentage points from last year.

In the digital arena, there is more emphasis on association websites, email blasts and digital newsletters than social media this year. In fact, the use of social media as an engagement tool fell 5 percentage points this year.

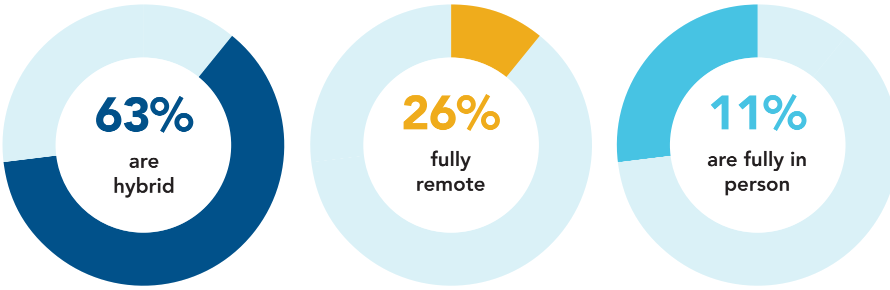
Annual/regional meetings replaced Facebook in the Top 10 member engagement tools, while the remaining nine carried over from last year as top channels, albeit not necessarily in the same ranking order.

Top 10 Engagement Channels

1. **Traditional conference/trade show/face-to-face events**
2. **Email blasts**
3. **Association website**
4. **E-newsletter(s)**
5. **Webinars**
6. **Training and development events**
7. **LinkedIn**
8. **Committee meetings**
9. **Networking events**
10. **Annual or regional meetings**

More than half reported they are appropriately staffed in most areas, up from last year. This is not a surprise with record employment levels in the past year. While COVID-19 is at a lower level of concern, full-time employees still prefer to work from home some of the time. This year, respondents report that 11% are fully in-person, 26% fully remote and 63% are hybrid. As noted last year, the hybrid model allows associations to hire the best team members for jobs regardless of their location. This flexibility means the right team members in roles that ideally correlates to the association's long-term success with their annual member engagement and non-dues revenue plans.

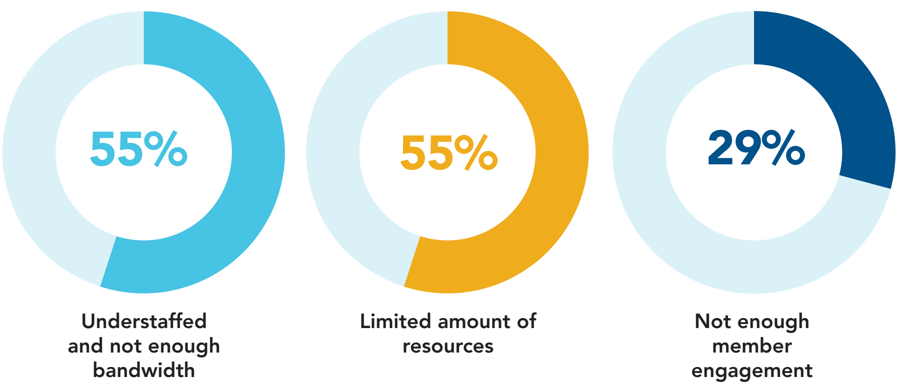
Work Environment



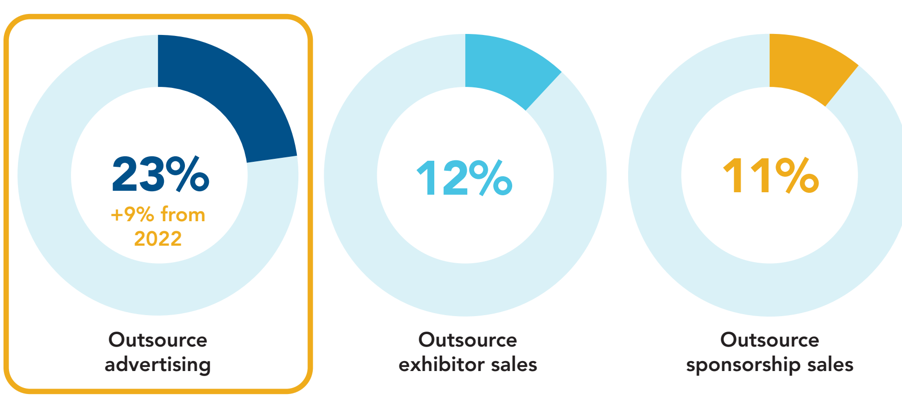
When it comes to the top challenge of generating non-dues revenue, several factors pose a barrier to associations. More than half feel they are understaffed when it comes to putting forth the effort in generating this type of revenue, while the same amount feel they have limited resources. Almost one-third indicate that limited member engagement affects the ability to successfully generate non-dues revenue. While it could be advantageous for associations to outsource this task for potential untapped revenue, associations do not outsource exhibitor sales (12%) and sponsorship sales (11%) to help close the gap. However, a departure from last year is that more associations (23%) are outsourcing advertising sales than they did in 2022 (14%).

Non-Dues Revenue Top Barriers

(Total exceeds 100% due to multiple response question)



Outsource Utilization



REPORT HIGHLIGHTS

Looking to the future, and as the job market has been extremely competitive, it is no surprise that associations are keenly interested in not only reaching – but engaging – young professionals. Successful communication with this group draws talent to the industry, and it also extends the legacy of the association. However, nearly half do not customize communications for early career members.

This year, many associations caught their breath after a tumultuous period of uncertainty. Many ramped up staff to better serve specific areas that needed attention. Also, associations proactively pursued non-dues revenue dollars by outsourcing advertising. As other challenges – most notably inflation – are here to stay for now, it is of utmost importance that organizations strategically prioritize goals, effectively communicate with members and partners, and actively engage next-gen members for a successful year.

Noteworthy Numbers

Non-Dues Revenue

- **More than half** of participants said they have limited resources when it comes to increasing non-dues revenue.
- **Nearly 2 in 3** cite top challenge to association was generating non-dues revenue.
- **Over half** survey advertisers/sponsors annually to determine specific preferences and gauge satisfaction.

Strategy

- **8 out of 10** use social media and email to drive traffic to their website.
- **4 in 5** use membership satisfaction surveys to determine member needs.
- **More than half** feel they are appropriately staffed in most areas.

Member Engagement Tools

- **More than 9 in 10** ranked traditional conferences, trade shows and face-to-face events as a top valued member engagement tool.
- LinkedIn was the only social media app listed in the **Top 10 most valued** engagement tools, as other apps fell in popularity.
- **4 in 5** cited email blasts, association website and e-newsletters as primary tools of member engagement.
- Online member directories climbed in ranking this year, with **nearly half** listing these as valuable engagement tools.
- **One-third of respondents** list print and digital magazines as a crucial medium for engagement.

Measurement

- **9 in 10** base event attendance as a primary indicator of membership engagement.
- **More than a quarter** conduct member surveys annually.

Effectiveness

- **More than half** cite communicating benefits effectively as a challenge.
- Engaging young professionals is a priority for **more than half** of respondents.
- **More than half** say they could do a better job of promoting communications as a member benefit.
- **Nearly half** believe leveraging data to make strategic decisions can be a daunting task.

Customization

- **Nearly half** do not customize communications for early career members or industry veteran members.
- **Only 1 in 10** provide a fully customized package for advertisers.
- **2 in 3** provide customized communications to new members.

Staffing

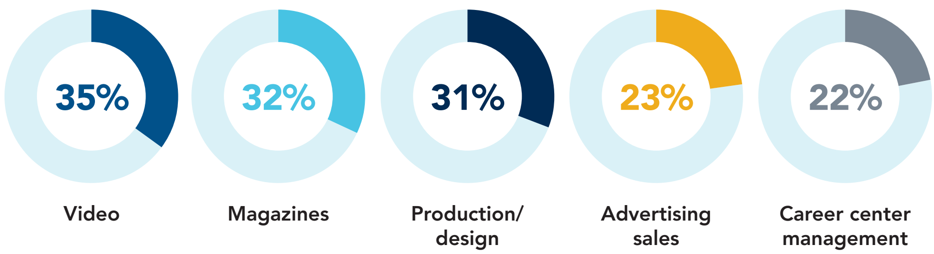
- **More than half** feel they are appropriately staffed in most areas.
- Marketing was the most understaffed area, with a **little less than half** citing a need for more help.
- **7 in 10** would hire more staff with a budget windfall.

STRATEGIC PLANNING

STRATEGY

Outsourcing Trends

(Total exceeds 100% due to multiple response question)



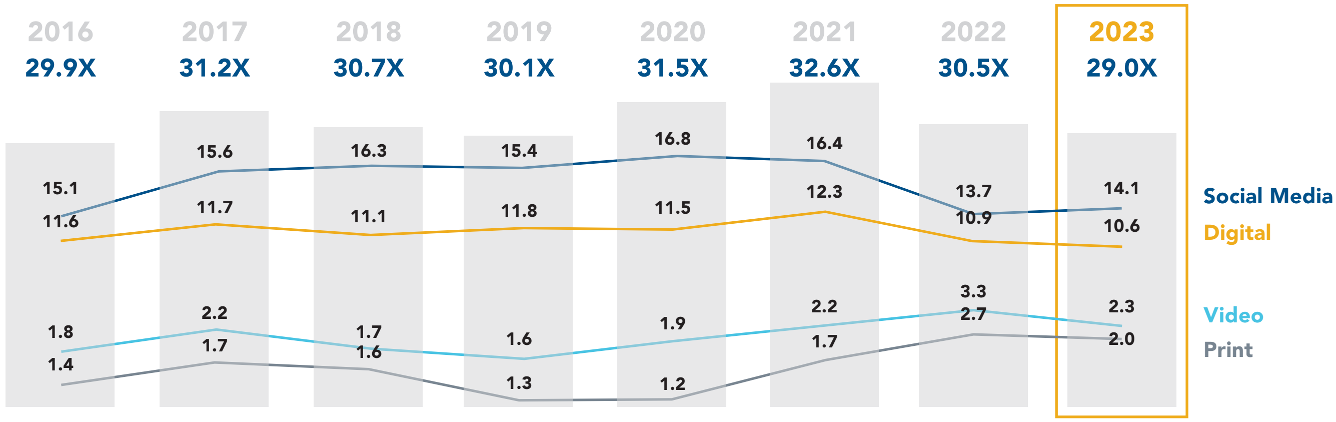
While associations appear to have reached a satisfactory stance about their internal staffing, it's still necessary to outsource some areas to better fulfill goals related to member publications and video production, sponsorship and advertising sales, and education and training. Most agree (81%) that video is part of their current content strategy, so it's no surprise that it locks in the No. 1 function most likely to be outsourced for the first time in the report's history. Almost 35% find a third party to perform this highly specialized task. Shortly behind it, magazines (32%) and production and design (31%) garnered top rankings in functions most likely to be outsourced. Interestingly, outsourcing magazines jumped 10 percentage points, which points to the notion that associations still prioritize that medium for engagement and as a source for non-dues revenue. In tandem with the top challenge of generating non-dues revenue, 23% outsource advertising sales. Also, a notable trend: Career center management rounded out the Top 5 ranking as recruitment, retention and workforce development has become a top priority for associations.

Outsourced Functions

(Total exceeds 100% due to multiple response question)

	2021	2022	2023	Year-over-year % point change
Video	27%	28%	35%	▲ 7%
Magazines	20%	22%	32%	▲ 10%
Production/design	32%	32%	31%	▼ 1%
Advertising sales	30%	14%	23%	▲ 9%
Career center management	NA	NA	22%	New
Full-service event management	NA	NA	21%	New
Finance & operations	NA	NA	20%	New
Public relations	NA	18%	19%	▲ 1%

Average Monthly Communication Frequency by Channel



Reaching the Masses

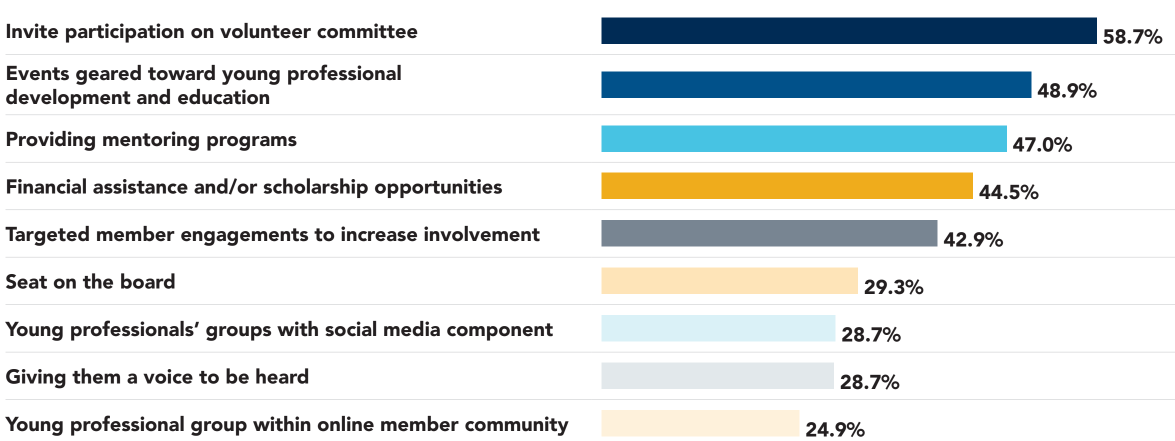
This year, average monthly frequency by channel varied somewhat from last year's numbers, with frequency dropping by 1.5 times per month overall. Respondents said they engage with members an average of 29 times per month over video, social media, digital and print. Last year, it was 30.5 times per month on average. There is a slight drop in video communications. It appears that while this is a priority in content strategy (81%), many associations just don't have the resources to create video on a regular basis. Print frequency decreased to twice a month. Perhaps, the rising costs of paper and shipping directly impacted this number, with associations seeking out other means, such as digital communications (10.6 times on average), to get their message across to members.

Rolling Out the Red Carpet to Next-Gen Members

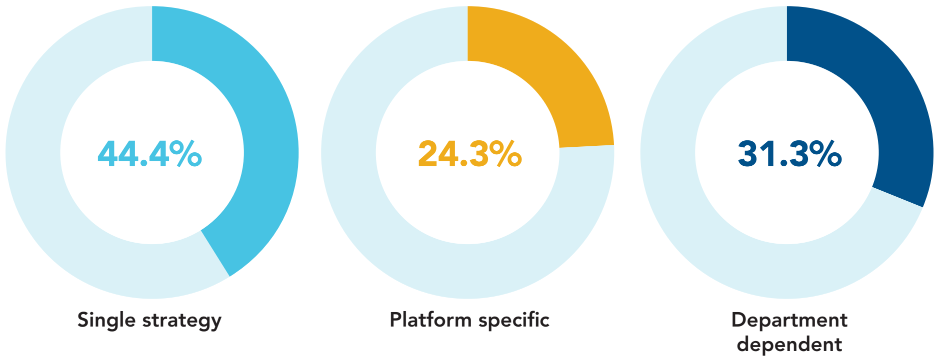
Associations are generally using the same methods as in previous years to attract new members. Volunteer committees increased by 3 percentage points this year, while events geared toward young professionals jumped 2 percentage points, jumped 2 percentage points, showcasing the value of events for member engagement. A standout increase was seen in mentoring programs, which increased to 47% this year, fulfilling the need to establish volunteer programs and career advancement opportunities.

Which of the Following Are You Using to Engage the Next Generation of Members at Your Organization?

(Total exceeds 100% due to multiple response question)



Which of the Following Most Closely Aligns with Your Strategy for Engaging Members?



SINGLE STRATEGY:	*A single strategy is used for all forms of association communication (e.g., print, online/digital, video, social). Each channel has a plan, purpose and integration opportunity.*
PLATFORM SPECIFIC:	*There is a plan in place for each platform (e.g., magazine, social media, etc.), and they are not integrated.*
DEPARTMENT SPECIFIC:	*Each department (e.g., communications, membership, events, etc.utilizes its own strategy and communicates with members as often as necessary.*

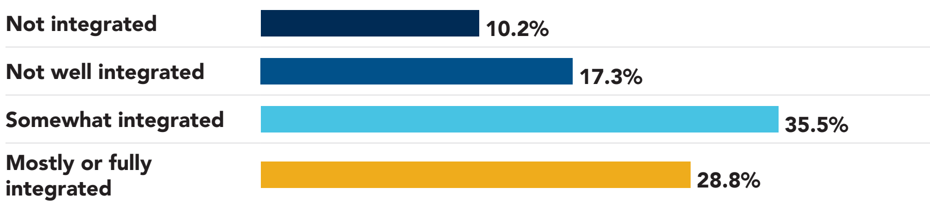
A Single Plan

Taking the opposite approach from "divide and conquer," 44% feel that the "unite and build" single strategy is the better tactic when it comes to engaging members. However, in comparison to last year, platform specific and department dependent methods switched places, with platform specific claiming 24.5% (32.6% last year) and department dependent taking second place with 31.3% this year (25.8% last year). This change in strategy may be indicative of better staffed associations this year, so they are able to take on specific tasks to free up other teams within the organization.

Pieces of the Puzzle

Overall, engagement tool integration can be beneficial as it enhances collaboration, improves customer experience, and streamlines communication processes. However, in some regard, complete integration may not meet the needs of some associations as they need to provide a more customized experience for member segments. A big takeaway from this year's report is that 27.5% believe their member engagement tools are not well integrated or not integrated at all, up slightly from last year. More than one-third have confidence that engagement tools are somewhat integrated followed closely by nearly 30% who feel they are mostly or fully integrated.

To What Extent Do You Believe Your Association's Member Engagement Tools are Integrated*?



**Our definition of "integrated" means each member engagement tool has a well-defined frequency, message, audience and purpose. Content is repurposed and cross-promoted as appropriate. Vendors have the ability to coordinate their purchases across all channels. Mostly/fully integrated = 4 or 5 on scale of 5, somewhat integrated = 3 on scale of 5, and not well integrated = 1 or 2 on scale of 5. The graph above does not equal 100% as 8.2% of respondents answered not applicable to their association.*

Talent & Technology Take Top Budget Priority

Every year, associations indicate more need for staff. This year's report showed a significant increase by 10 percentage points, with seven in 10 opting to allocate unexpected budget dollars toward hiring more staff. This slightly contradicts the response to questions about whether departments are "appropriately staffed," which trended upward this year – with more than half reporting most areas were staffed to their liking.

In the technology arena, associations showed even more interest this year in redesigning their websites, perhaps in an effort to remedy the No. 2 ranked challenge of communicating member benefits effectively. There was a downturn in the effort to improve mobile strategy, as either associations have accomplished this already – maybe as a need during COVID-19 when people were attending fewer events and communicating predominantly by their devices – or this has simply become less of a priority as higher-level goals require more funds.

If Your Association Received an Unplanned 50% Increase in Annual Budget, How Would You Spend It?

(Total exceeds 100% due to multiple response question)

	2020	2021	2022	2023	Year-over-year % point change
Hire more staff	44%	45%	59%	69%	▲ 10%
Improve quality of existing member engagement vehicles	50%	42%	46%	49%	▲ 3%
Improve content strategy and curation capabilities	60%	49%	33%	32%	▼ 1%
Redesign association website	NA	NA	23%	32%	▲ 9%
Implement or improve data strategy	NA	NA	24%	30%	▲ 6%
Provide more robust video	47%	41%	26%	26%	Neutral
Implement or improve learning management and certification program(s)	NA	NA	25%	25%	Neutral
Host more live member events (networking events, lunch and learns, etc.)	NA	NA	20%	25%	▲ 5%
Put more muscle behind social media	46%	34%	30%	24%	▼ 6%
Upgrade our publishing tools, technologies or processes	40%	32%	24%	23%	▼ 1%
Implement or change association management software	NA	NA	22%	22%	▼ 1%
Increase or improve government advocacy	NA	NA	19%	20%	▲ 1%
Launch new member engagement vehicle	NA	NA	NA	15%	New
Improve our mobile strategy (e.g., mobile website and/or custom apps)	28%	26%	24%	14%	▼ 10%
Implement a career center and job board	NA	NA	9%	4%	▼ 5%

Website Traffic Strategy

New this year, the report dives into how associations are strategically using various tools to drive members to their online member engagement channels. Social media, email and education offerings, respectively, are how most associations drive traffic to their websites. When urging members to seek out their career center or job board, respondents look to email, social media and online communities. Interestingly, education offerings ranked last in driving traffic to job boards, even though these two elements are closely linked.

Social media apps and email serve as the top communication tools respondents say drive people to their website.

What Strategies Do You Use to Drive Traffic to Your Website?

(Total exceeds 100% due to multiple response question)

88.6%
Social media

88.3%
Email

74.4%
Education offerings

63.1%
Event materials and signage

55.8%
Job board

What Strategies Do You Use to Drive Traffic to Your Career Center or Job Board?

(Total exceeds 100% due to multiple response question)

50.5%
Email

41.6%
Social media

21.8%
Free resources (ex. online communities)

19.9%
Digital advertising

15.8%
Search engine optimization (SEO)

14.2%
Education offerings

EFFECTIVENESS

Associations Overcame Many Obstacles

While the industry will always face challenges, it appears associations have conquered significant obstacles in past years. For instance, "combating information overload/cutting through the clutter" consistently ranked the biggest challenge for consecutive years, with as many as 70% reporting it as a challenge. This has dropped to less than half reporting it as a top hurdle, which could be the result of associations honing in on the best channels to engage members, as many social media apps dropped in ranking as a valuable engagement tool.

More than half reported "generating non-dues revenue," "communicating member benefits effectively," and "engaging young professionals" as top challenges while the least concerning ones included "keeping members informed about new events and continuing education," "providing mobile-friendly communications," and "implementing career center and job board."

Top 5 Communication Challenges Faced by Associations

(Total exceeds 100% due to multiple response question)

57.7%

Generating non-dues revenue

55.8%

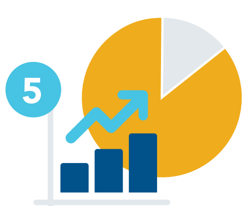
Communicating member benefits effectively

53.9%

Engaging young professionals

47.9%

Combating information overload/cutting through the clutter

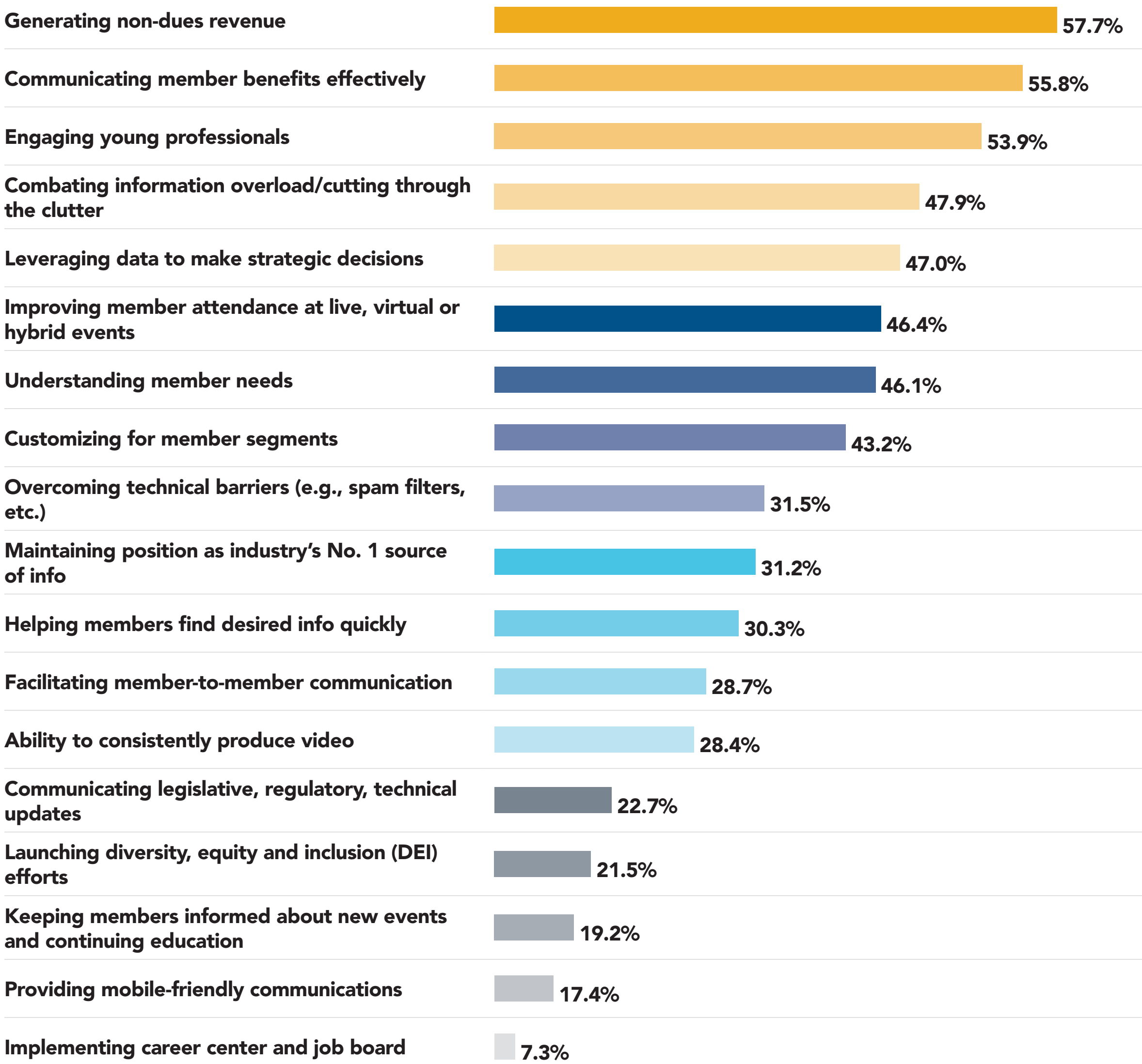


47.0%

Leveraging data to make strategic decisions

Overall Biggest Challenges

(Total exceeds 100% due to multiple response question)



Ranking of Less Concerning Challenges 2023

	2022	2023
Combating information overload/cutting through the clutter	1	4
Customizing for member segments	3	8
Ability to consistently produce video	7	13

Ranking of More Concerning Challenges 2023

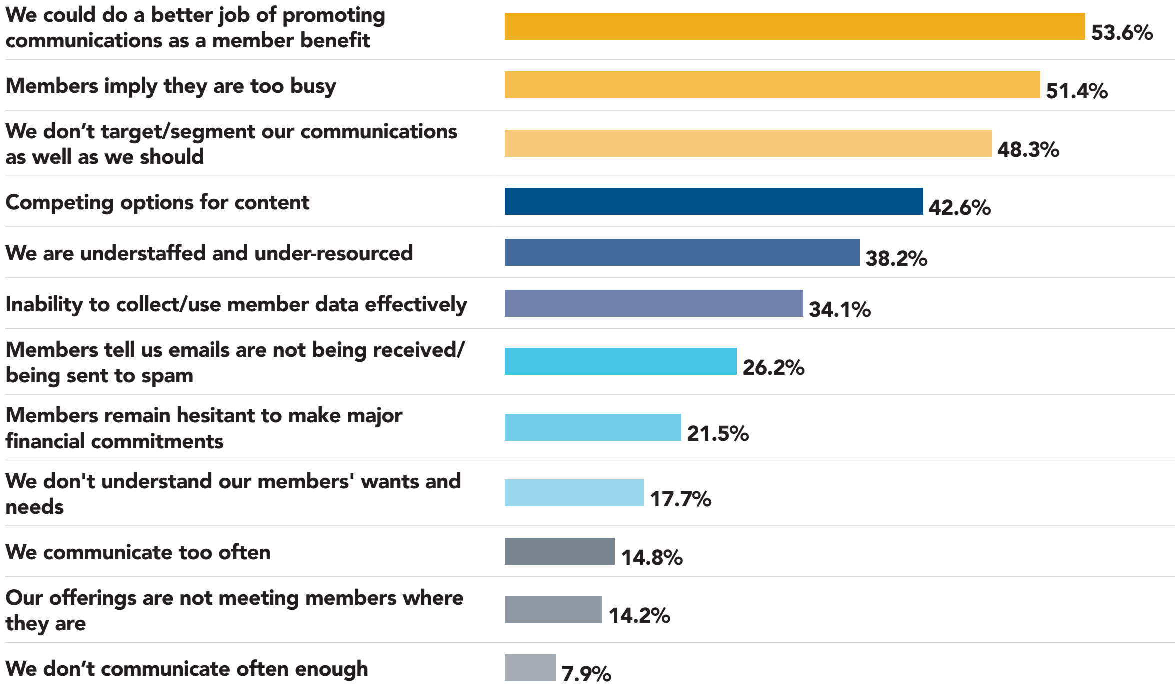
	2022	2023
Generating non-dues revenue	2	1
Maintaining position as industry's No. 1 source of info	12	10
Communicating legislative, regulatory, technical updates	16	14

Do I Have Your Attention?

This year, the same list of barriers is prevalent when it comes to increasing member engagement. The No. 1 barrier of "promoting communications as a member benefit" directly points to the second biggest challenge of "communicating member benefits effectively." As other organizations and media vie for members' attention, associations are competing against a large pool of various marketing messages in both personal and professional circles, which leads to the second biggest barrier, "members imply they are too busy." Both of these previous points lead to the third-ranked barrier, "we don't target/segment our communications as well as we should," which is a rational explanation of promoting the right benefits to the correct member segment and sending the proper message to targeted members, so it does catch their attention.

Barriers to Increasing Member Engagement

(Total exceeds 100% due to multiple response question)



Ranking of Barriers to Increasing Member Engagement 2022 vs. 2023

	2022	2023	Year-over-year
We could do a better job of promoting communications as a member benefit	1	1	Neutral
Members imply they are too busy	2	2	Neutral
We don't target/segment our communications as well as we should	3	3	Neutral
Competing options for content	4	4	Neutral
We are understaffed and under-resourced	5	5	Neutral

MEASUREMENT

In-Person Events are the Meter for Determining Member Engagement

While digital communication is important in reaching all members across state and international lines, this year, live events have experienced a substantial jump when it comes to assessing member engagement. This comes as no shock since face-to-face events continue to take the No. 1 spot in ranked member engagement tools. This year, attendance at events jumped 18 percentage points with 9 in 10 indicating this is the top criteria they assess in regard to member engagement.

Nine in 10 respondents report that attendance at events is the top criteria they assess in regard to member engagement.

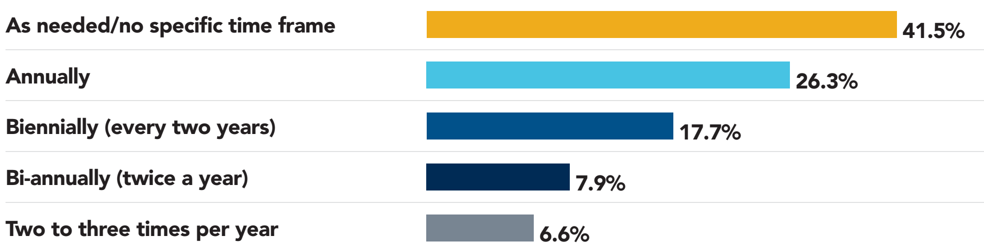
Most Important Criteria for Assessing Member Engagement

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year % point change
Attendance at events	74%	92%	▲ 18%
Participation on committees	57%	65%	▲ 8%
Length of membership	52%	63%	▲ 11%
Email metrics	56%	62%	▲ 6%
Surveys	46%	55%	▲ 9%
Volunteerism	35%	49%	▲ 14%
Interaction with our social media channels or online community	36%	46%	▲ 10%
Continuing education credits	29%	38%	▲ 9%
Amount of non-dues revenue generated by person or company	NA	32%	New
Member referrals	21%	27%	▲ 6%
Purchases made (bookstore, white papers, research)	24%	26%	▲ 2%
Attendance at local chapter meetings	27%	25%	▼ 2%
Financial donations to our foundation	25%	24%	▼ 1%
Verbatim comments	18%	22%	▲ 4%
Number of contacts made with member services	NA	20%	New
Voted in an annual election	18%	17%	▼ 1%
Interaction with our career center	16%	16%	Neutral

Checking in with members on a regular basis helps determine their needs as well as provides important information to associations so they can keep a pulse on industry concerns. This knowledge can also guide associations in the right direction in terms of targeted messages and offerings to specific member segments. While nearly all respondents conduct member surveys, only a quarter commit to conducting an annual survey. What is more alarming is that a majority (42%) have no planned strategy or regular schedule for survey administration. However, more respondents this year are sending surveys yearly, but there was a large decline in survey frequency of at least once every two years, which garnered 63% last year and only 20% this year.

Communication Survey Frequency

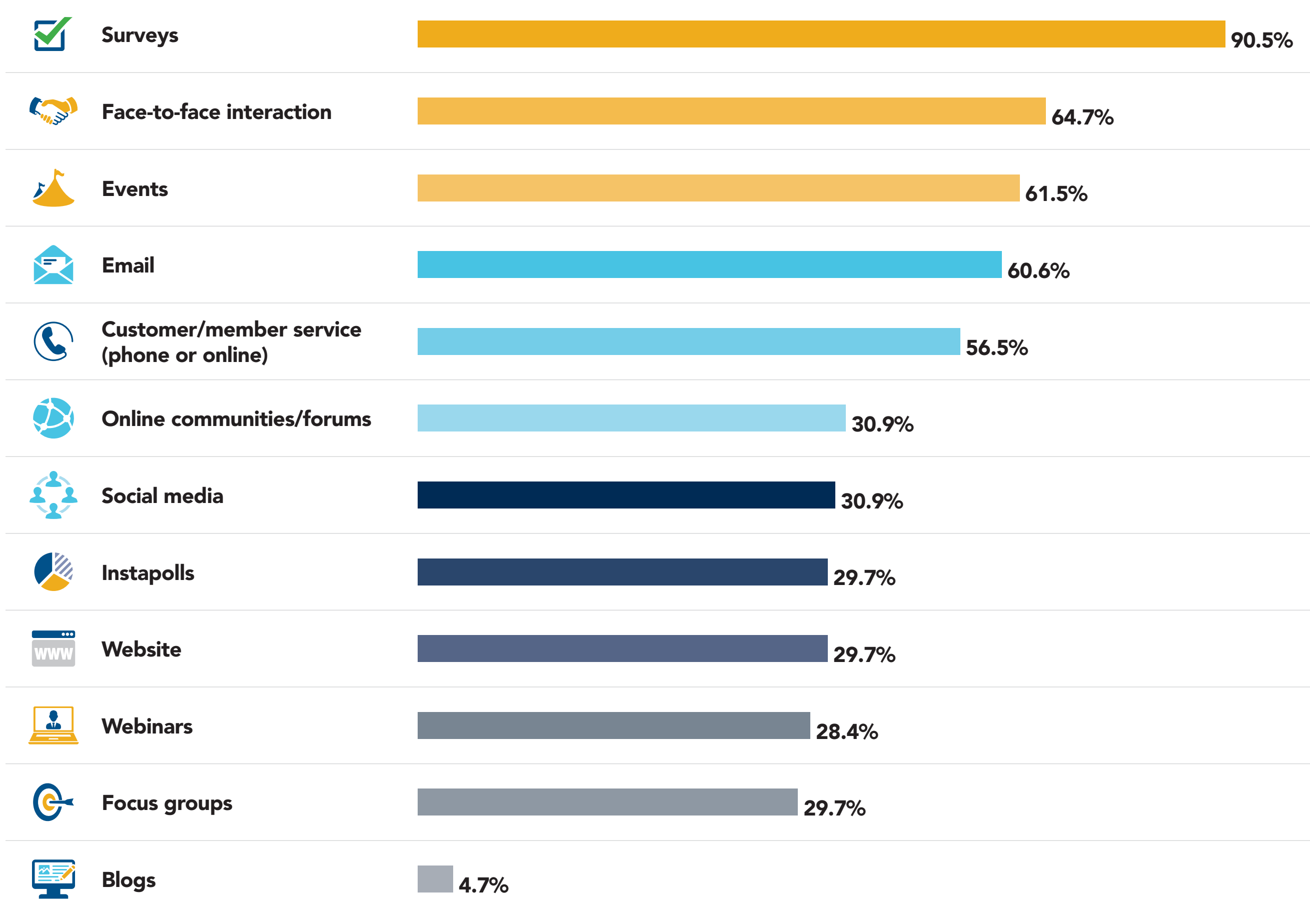


Member Evaluation is Top of Mind with Surveys Leading the Way

Member surveys, face-to-face interaction, email, event and customer service were the five most frequently used tools to evaluate member needs again this year – same as in 2022. Surveys surged 20 percentage points compared to last year, with 37% more respondents sending them to members annually, compared to the 2022 report.

Most Used Channels to Evaluate Member Needs

(Total exceeds 100% due to multiple response question)



Ranking of Most Used Channels to Evaluate Member Needs

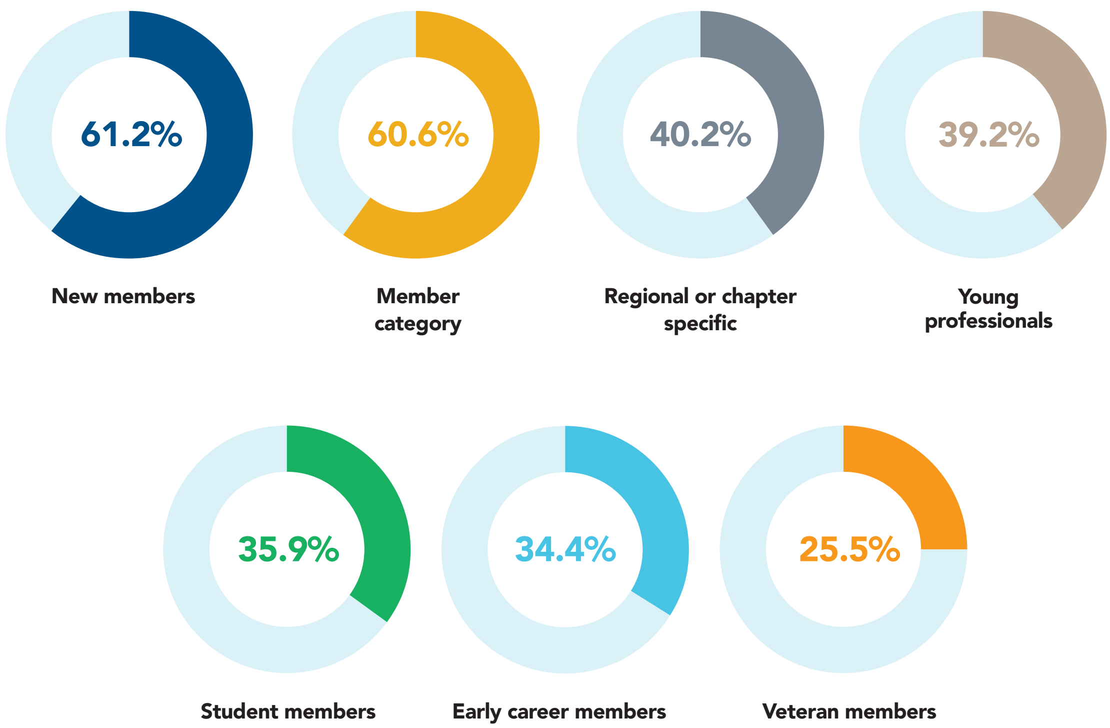
	2022	2023	Year-over-year rank change
Surveys	1	1	Neutral
Face-to-face interaction	2	2	Neutral
Events	4	3	▲ 1
Email	3	4	▼ 1
Customer/member service (phone or online)	5	5	Neutral
Online communities/forums	6	6	Neutral
Social media	10	7	▲ 3
Instapolls	NA	8	New
Website	8	9	▼ 1
Webinars	9	10	▼ 1
Focus groups	7	11	▼ 4
Blogs	NA	12	New

CUSTOMIZATION

Associations know the importance of delivering members a customized experience based on the type of member, location and career level. While many respondents are focused on new members (61%), which is part of the onboarding process, young professionals (39.2%) receive the most customized experience before early career members (34%) and student members (36%). It's important not to forget veteran members (26% – the lowest customized experience), who can bring experience and industry knowledge to the organization and also qualify for serving on the board or other high-level positions. On the flip side, only 40% customize the experience for young professionals, which may indicate why the No. 3 biggest challenge for associations is engaging young professionals.

Members Most Likely to Receive Customized Experience

(Total exceeds 100% due to multiple response question)

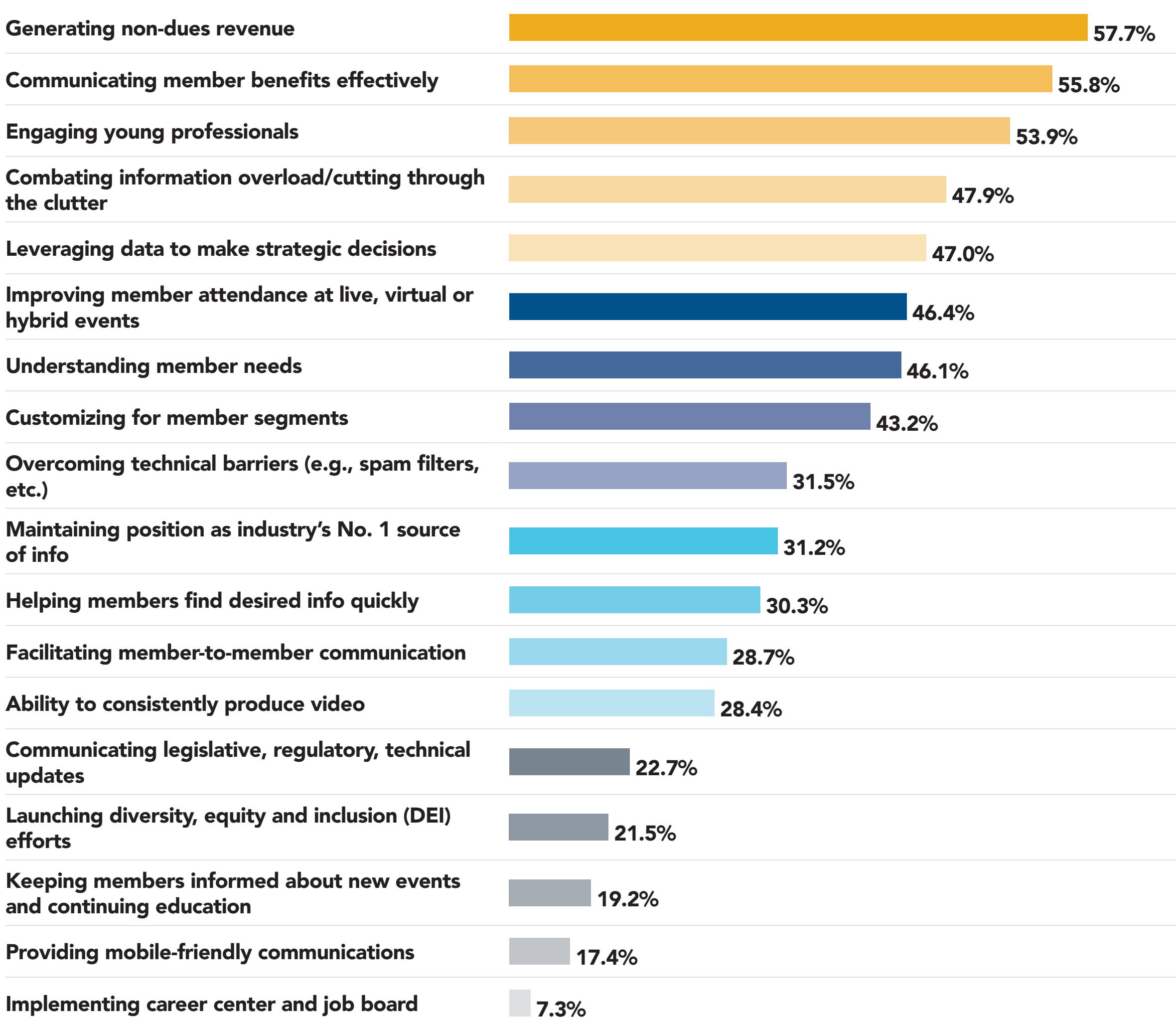


MEMBER ENGAGEMENT TOOLS

When overall strategy comes into play, member engagement takes top billing. As more media options – particularly on digital platforms – become available, it can become challenging for associations to leverage their value to members. Remember, customization is also important in building and sustaining membership. The more cohesive and consistent the message and delivery, the better the member engagement. A little more than a quarter (28.8%) believed their member engagement tools are mostly or fully integrated, down from 43% in 2021 and 32% in 2022. Could this be attributed to not "cutting through the clutter" or perhaps not "leveraging data to make better decisions"?

Top Challenges Associations Face to Member Engagement

(Total exceeds 100% due to multiple response question)



ENGAGEMENT TOOLS OVERVIEW

Member Engagement Tools Surge in Usage Overall

This year's report reflects an increase across all engagement tools when compared to last year. Live events continue to reign supreme with 9 in 10 ranking traditional conferences, trade shows and face-to-face events as the top valued member engagement tool, up 10 percentage points from last year. Virtual conferences and hybrid events fell in popularity, dropping more than 7 percentage points from last year. As digital engagement tools continue to dominate the Top 10 list, there is more emphasis on association websites, email blasts and digital newsletters than social media this year. In fact, the use of social media as an engagement tool fell 5 percentage points this year. LinkedIn climbed one spot, as it slowly makes its way up (it also rose one rank last year). Annual/regional meetings replaced Facebook in the Top 10 member engagement tools, while the remaining nine carried over from last year as top channels.

Top 10 Overall Member Engagement Tools, 2022 vs. 2023

(% respondents who find each very/extremely valuable)
(Total exceeds 100% due to multiple response question)

	2023	2023 Rank	Year-over-year rank change	Year-over-year % point change
Traditional conference/events	91.5%	1	Neutral	▲ 10.0%
Email blasts	86.2%	2	Neutral	▲ 6.0%
Association website	85.3%	3	Neutral	▲ 7.2%
E-newsletter(s)	79.6%	4	Neutral	▲ 5.8%
Webinars	71.4%	5	Neutral	▲ 2.7%
Training and development events	70.3%	6	Neutral	▲ 2.7%
LinkedIn	68.6%	7	▲ 1	▲ 7.9%
Committee meetings	66.6%	8	▼ 1	▲ 2.2%
Networking events	65.5%	9	Neutral	▲ 5.8%
Annual or regional meetings	55.7%	10	▲ 1	▲ 2.5%

Top 3 Biggest Gains, 2022 vs. 2023

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year rank change
Online community forum	27	20	▲ 7
Member magazine (digital)	24	19	▲ 5
Appointment setting events	32	27	▲ 5
Apps	35	30	▲ 5

Top 3 Biggest Declines, 2022 vs. 2023

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year rank change
E-commerce store	26	33	▼ 7
Hybrid events (virtual + live)	19	26	▼ 6
Twitter	13	17	▼ 4
Instagram	25	29	▼ 4
Pinterest	44	48	▼ 4

EVENTS

Live events, particularly annual conferences/trade shows and training and educational classes, are preferential tools of engagement and ranked in the Top 10 most valuable ways to connect with members.

Perceived Value of Event Engagement Tools

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year % point change
Conference/face-to-face events	81.5%	91.5%	▲ 10.0%
Training & development events	67.6%	70.3%	▲ 2.7%
Committee meetings	64.4%	66.6%	▲ 2.2%
Networking events	59.7%	65.5%	▲ 5.8%
Annual or regional meetings	53.2%	55.7%	▲ 2.5%
Virtual conferences/events	52.2%	44.1%	▼ 8.1%
Hybrid events (virtual + live)	37.5%	30.4%	▼ 7.1%
Young professional events	35.7%	30.9%	▼ 4.8%
Appointment setting events	25.8%	29.0%	▲ 3.2%

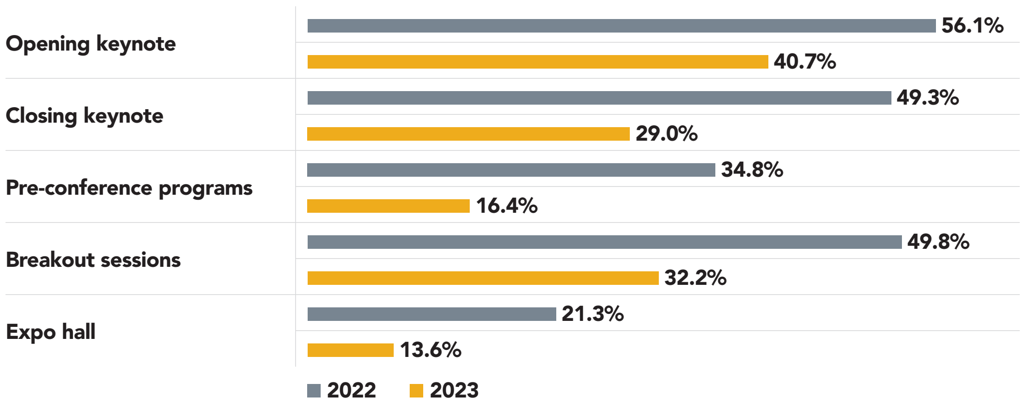
Virtual Options May Be a Fleeting Reality for Future Events

It appears for the first time in the last few years that virtual-only events may soon be a rarity. In most event offerings, the number of virtual options decreased by almost half. Associations want to incentivize members to attend live events, so removing virtual participation in preconference programs and keynote sessions brings value to attending the conference in person. Another reason could be that people would prefer to attend events rather than passively participate from a screen, so associations are not seeing the return on investment for virtual-only events.

Compared to last year, 66% less respondents are offering virtual-only events.

Virtual Event Offerings to Members

(Total exceeds 100% due to multiple response question)



How Does Your Association Intend to Host Events this Year and Beyond?

	2022	2023	Year-over-year % point change
Hybrid (mix of live and virtual/ streaming)	57.4%	54.7%	▼ 2.7%
Live only	34.1%	42.7%	▲ 8.6%
Virtual only	8.5%	2.5%	▼ 6.0%

DIGITAL MEDIA

Digital's Changing Mediascape

Digital media has been a game-changer over the past decade in the trade publications industry and is a significant way in which organizations communicate with their audience. Email blasts, websites and e-newsletters are the Top 3 most valued digital engagement tools – and all these gained points from last year.

Email blasts continue to gain ground in value, which makes sense, as this tool allows associations to send targeted messages to member segments. Tools on the list that fell significantly in perceived value this year are e-commerce stores, video and text messaging. Something to keep an eye on is the value of digital magazines, which gained almost 5 percentage points this year. Two in five respondents produce a digital magazine to complement a print counterpart, and 16% said that have replaced the print magazine with a digital edition.

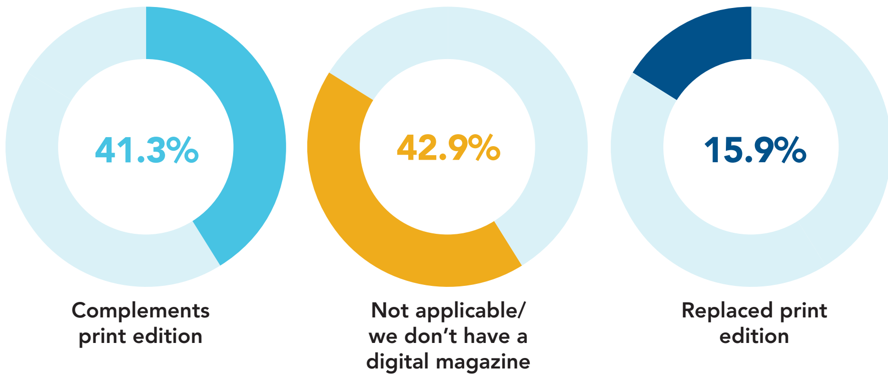
Perceived Value of Digital Engagement Tools 2022 vs. 2023

(% respondents who find each very/extremely valuable)

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year % point change
Email blasts	80.2%	86.2%	▲ 6.0%
Association website	78.1%	85.3%	▲ 7.2%
E-newsletter(s)	73.8%	79.6%	▲ 5.8%
Webinars	68.7%	71.4%	▲ 2.7%
Social media	63.8%	58.9%	▼ 4.9%
Surveys (online)	46.8%	51.1%	▲ 4.3%
Online member directory	43.8%	46.6%	▲ 2.8%
Video	44.3%	38.3%	▼ 6.0%
Member magazine (digital)	32.7%	37.2%	▲ 4.5%
Online community forum	31.8%	35.4%	▲ 3.6%
Online career center	37.1%	34.9%	▼ 2.2%
Annual report (digital)	29.9%	29.2%	▼ 0.7%
Apps*	24.3%	27.4%	▲ 3.1%
White paper (digital)	27.5%	26.5%	▼ 1.0%
Show guide (online)	26.4%	25.4%	▼ 1.0%
E-commerce store	32.3%	24.5%	▼ 7.8%
Blogs	25.3%	20.8%	▼ 4.5%
Podcasts	19.7%	16.9%	▼ 2.8%
Online buyers guide	15.9%	16.9%	▲ 1.0%
Text messaging	16.1%	10.1%	▼ 6.0%

The Role of Digital Magazines



Social Media is a Mixed Bag

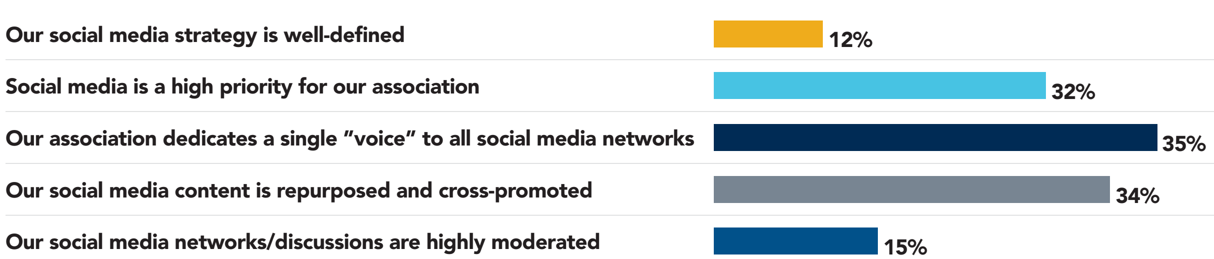
More than an estimated 4 billion people are using social media worldwide, a number projected to increase to almost 6 billion in 2027. Social media is an enigma when it comes to measuring its value to associations. In the overall scheme of things, social media ranked No. 5 as a most-valued member engagement tool for the past two years. However, this year, it fell 5 percentage points in value, which could result in user fatigue regarding specific social media platforms. As more apps become available, there could be confusion as to how they would apply to a professional environment. Call it the "app of the month" syndrome, but as members already struggle with time (51% of respondent said that members imply they are too busy), associations need to be selective in choosing the appropriate social media platforms to reach the target audience. LinkedIn was the only social media app listed in the Top 10 most valued engagement tools, as other apps fell in popularity.

Three in 10 (34%) strongly agree that their social media content is repurposed and cross-promoted. One-third strongly agree that their social media networks have a "single voice," up from 26% last year. Perhaps this points to almost half (47.6%) dedicating one full-time employee to social media. A concerning drop in content strategy confidence, only 12% strongly agree that their social media strategy is well defined (vs. 19% in 2022 and 25% in 2021).

LinkedIn was the only social media app listed in the Top 10 most valued engagement tools, as other apps fell in popularity.

To What Extent Do You Strongly Agree with the Following Statements about Social Media's Role at Your Organization?

(Total exceeds 100% due to multiple response question)



LinkedIn continued to dominate the social media platform as the top choice for most respondents (69%) – and was the only app that gained percentage points this year. Facebook and Twitter fell most significantly this year, as members move toward more professionally tuned platforms.

Ranking of Social Media Engagement Tools/Apps

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year % point change
LinkedIn	60.7%	68.6%	▲ 7.9%
Facebook	55.2%	46.5%	▼ 8.7%
Twitter	47.0%	37.7%	▼ 9.3%
YouTube	35.4%	34.9%	▼ 0.5%
Private online community*	33.8%	31.3%	▼ 2.5%
Instagram	32.4%	28.3%	▼ 4.1%
Vimeo	18.9%	15.2%	▼ 3.7%
TikTok*	10.2%	3.2%	▼ 7.0%
Reddit	N/A	2.3%	New
Flickr*	8.7%	1.9%	▼ 6.8%
WhatsApp	N/A	1.9%	New
Snapchat	7.6%	1.6%	▼ 6.0%
Pinterest	9.1%	1.3%	▼ 7.8%

**Meta's Threads platform launched in July 2023, after this year's survey period, so was not included as an option.*

PRINT

Print is Alive and Kicking

Print publications have held their own over time, even as their digital counterparts are more prevalent in all types listed in the ranking. Member magazines/journals have held the top spot in the ranking since the report's inception. While magazines fell dramatically in perceived value last year (10 percentage points from 2021), there was a recovery this year, with it regaining 5 percentage points. The increase in cost of supplies and shipping have most likely affected associations' frequency of engagement with print publications, but the sector that showed the biggest decrease in value are white papers.

Perceived Value of Print Engagement Tools

(Total exceeds 100% due to multiple response question)

	2022	2023	Year-over-year % point change
Member magazine/journal*	39.8%	44.8%	▲ 5.0%
Member newsletter (print)	39.8%	37.4%	▼ 2.4%
Member directory (print)*	27.9%	28.6%	▲ 0.7%
Show guide*	24.6%	24.0%	▼ 0.6%
Direct mail	24.1%	22.8%	▼ 1.3%
Annual report	22.1%	19.2%	▼ 2.9%
White paper*	19.7%	12.5%	▼ 7.2%

VIDEO

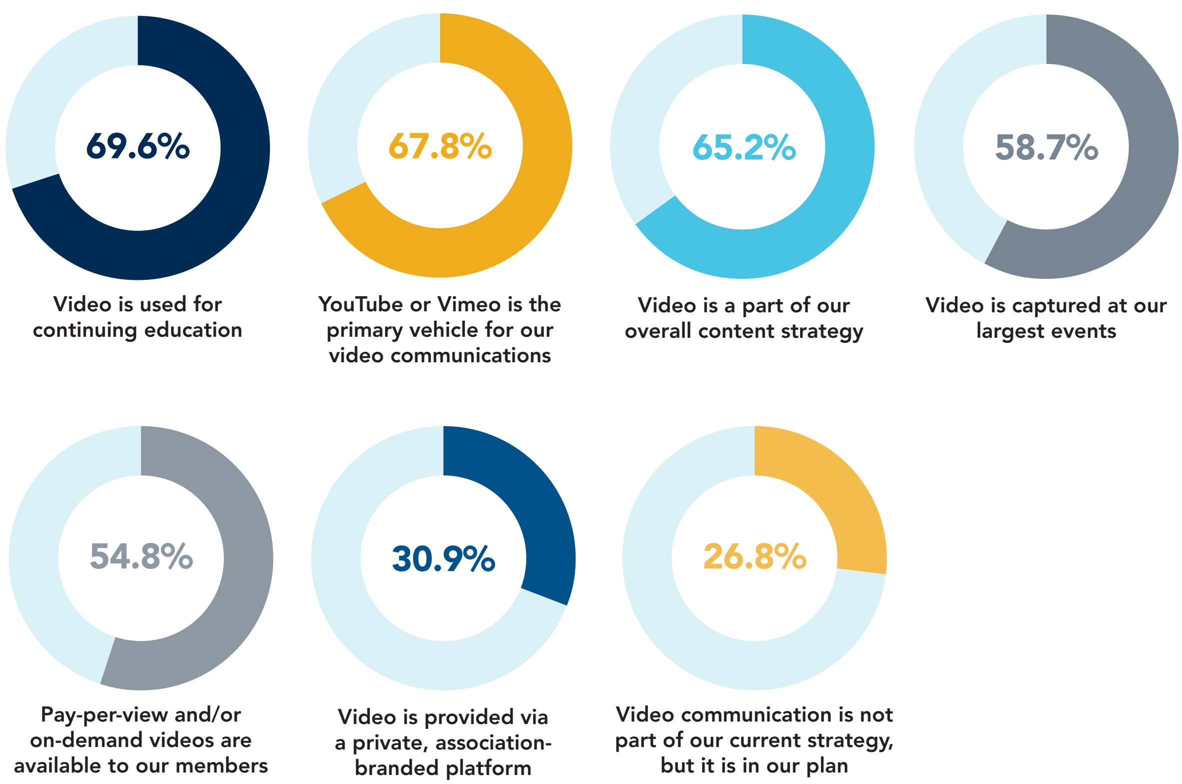
Associations Aspire to Put More Effort and Money into Video

While 65.2% of respondents said video is part of their overall content strategy, video production is also a challenge for 28% of those surveyed. Almost 7 in 10 said they use YouTube or Vimeo platforms to host their videos, and over half indicated members could purchase or access on-demand videos – making this an opportunity for non-dues revenue in some cases. Most (70%) use videos for continuing education while 60% film in-person events. Another 26% would devote more money toward a more robust video member engagement program, so it's clear that interest in this communication tool is here to stay.

It's worth mentioning that popular video-based social platforms (YouTube, Vimeo and TikTok) on the report's member engagement ranking) enable anyone to deliver live footage to a mass audience anywhere in the world. As video is more accessible to everyone at no cost, it is expected this engagement channel will continue to climb the list. In fact, YouTube is the highest ranked video-based platform this year and held its place at 22 from last year.

Do You Agree with the Following Statements About Your Association's Use of Video for Member Engagement?

(Total exceeds 100% due to multiple response question)



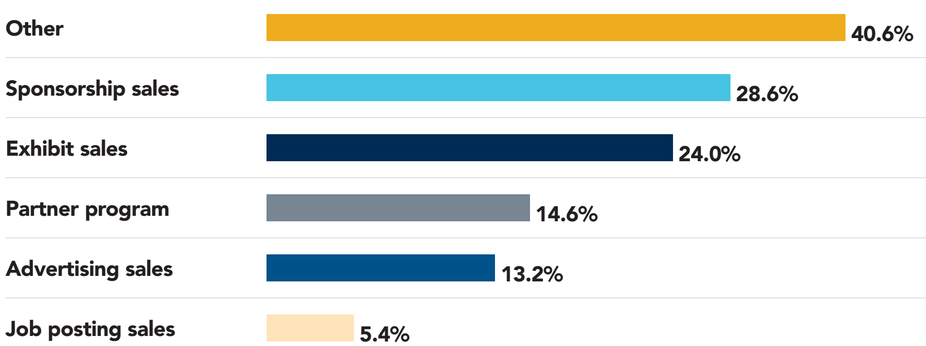
NON-DUES REVENUE

Non-Dues Revenue is a Priority

Non-dues revenue enables associations to bring extra value to their members, and it is rare for associations to be able to properly sustain the organization on member dues alone. This year, "generating non-dues revenue" became the top challenge for the first time in survey history, climbing from the No. 2 challenge last year. And to boot, more than half of associations said they are understaffed and have limited resources when it comes to increasing non-dues revenue. The good news is that survey respondents seem to be addressing the issue by allocating more of the budget to make up for lost opportunities. Since many do feel they have limited resources in-house, nearly double the respondents this year (23%) said they are outsourcing advertising sales.

Non-Dues Revenue Sources

(Total exceeds 100% due to multiple response question)

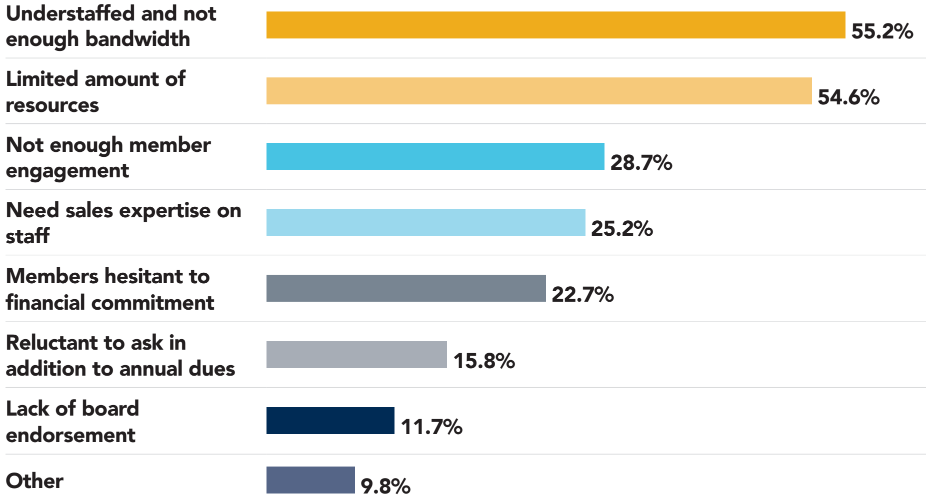


You Have to Spend Money to Make Money

The top barriers to increasing non-dues revenue mostly result from lack of staff and resources, and a quarter said more sales expertise among staff was a barrier. One in three said there was not enough member engagement (perhaps due to the lack of highly customized messaging by the association in some instances. On a positive note, less respondents (22.7%) pointed to members being hesitant to financially commit than last year (26.2%).

Barriers to Increasing Non-Dues Revenue

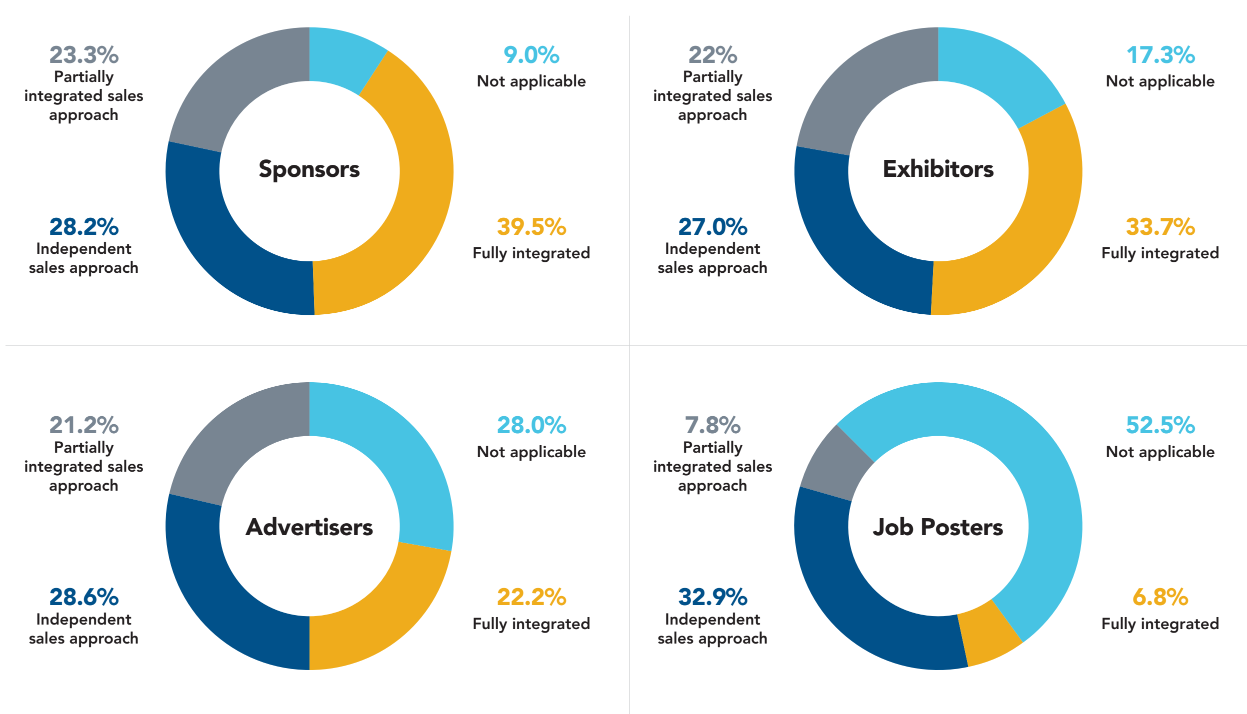
(Total exceeds 100% due to multiple response question)



Divide and Not Conquer

Depending on the type of sales opportunity, the approach can range from fully integrated (sales opportunities across all channels) to partially integrated (may extend sales opportunities/packages to a few channels but not all) to independent (one opportunity at a time). Most (40%) prefer a fully integrated approach when it comes to sponsorships while only 22% approach advertisers with myriad opportunities. This could be due to a lack of sales expertise among staff, which a quarter of respondents said was a barrier to increasing revenue. One-third also prefer the fully integrated approach when it comes to exhibitors. When possible, it's more lucrative for associations to take an integrated approach so they can capitalize on more advertising dollars.

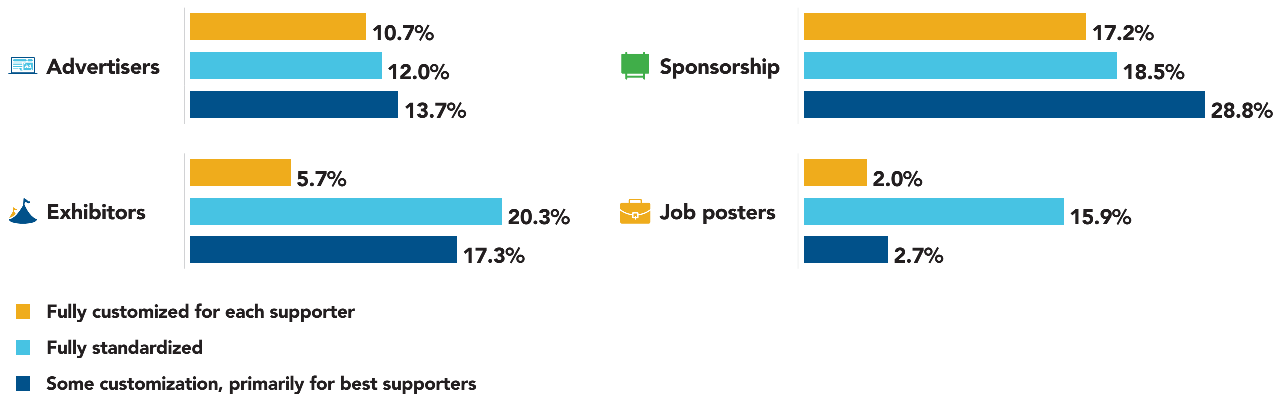
What Best Describes Your Sales Approach According to Audience?



The Gift of Customization

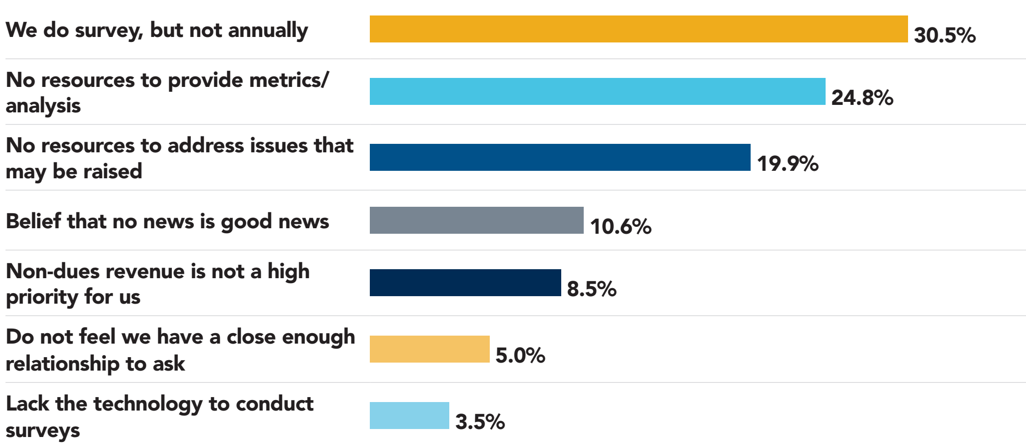
Associations face a double-edged sword with an integrated sales approach to various opportunities because the more channels included in the offering, sometimes the less customized package. However, when appropriate, it can be more advantageous to approach potential financial supporters with highly customized packages – to instill confidence in the purchase through valued customer service and attention to detail when it comes to sponsors' needs. In the realm of fully customized packages, 17% of respondents offered this for various sponsorships – the most out of all the various types of sales opportunities. One in five offered exhibitors fully standardized packages.

Package Customization for Financial Supporters



Reasons for Not Surveying Financial Sponsors

(Total exceeds 100% due to multiple response question)



Again, it goes back to a lack of resources, either in protocol or people. While one-third admitted to surveying financial supporters (but not annually), others assumed everything is going well or lack the methods and technology to address any issues. One of the few departments that are understaffed this year, according to the report, is marketing, which would most likely be the team to administer these types of surveys.

ASSOCIATION STAFFING

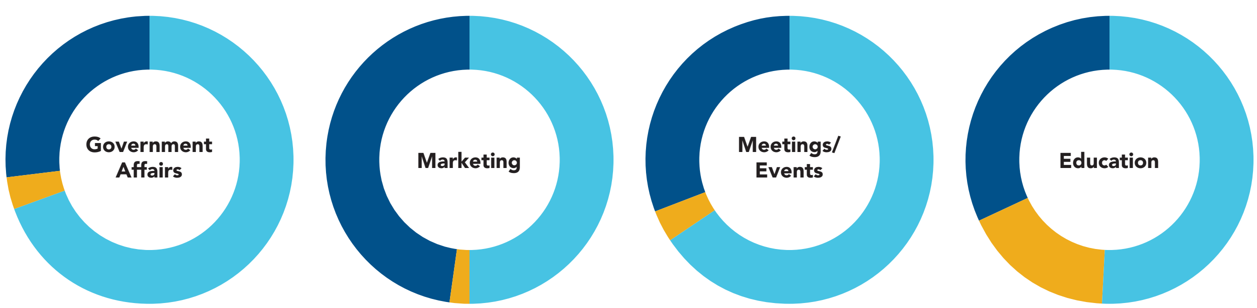
For the first time in years, associations feel they are staffed appropriately in most areas (over 60% in education, meetings/events and government affairs). Perhaps this is why respondents this year seemed to remedy some of the challenges they had in the past, including "combating information overload/cutting through the clutter," which was consistently ranked the biggest challenge for consecutive years, but this year less than half reported it as a top hurdle.

Overall Associations Full-Time Employees

FTE		
1	41	13.1%
2 to 3	60	20.4%
4 to 5	64	10.5%
6 to 10	33	14.7%
11 to 25	46	19.2%
More than 26	59	18.8%
None	10	3.2%

- 1 in 5 respondents have 2-3 full-time employees.
- Over 60% feel they are staffed appropriately in most areas, which is a departure from last year's consensus that most areas were understaffed (51%).
- Almost half felt marketing-related departments are understaffed, which may explain why advertising is being outsourced at a higher rate (23%) this year.
- 7 in 10 feel government affairs roles are staffed "just right."

Departments Most Likely to be Understaffed, Just Right or Overstaffed

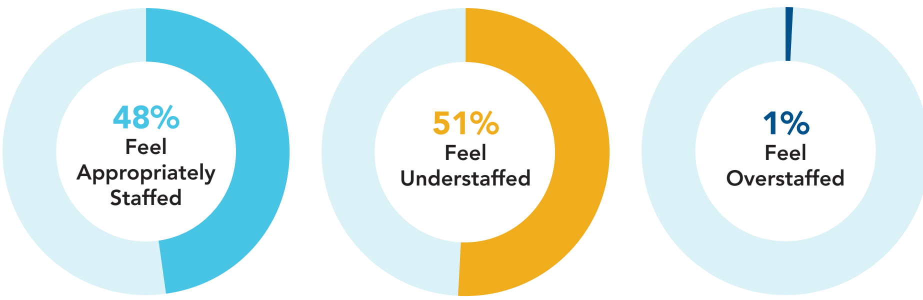


Government Affairs		Marketing		Meetings/Events		Education	
Just Right	69.6%	Just Right	50.2%	Just Right	65.7%	Just Right	60.0%
Overstaffed	3.6%	Overstaffed	2.3%	Overstaffed	3.5%	Overstaffed	2.6%
Understaffed	26.8%	Understaffed	47.6%	Understaffed	30.8%	Understaffed	37.4%

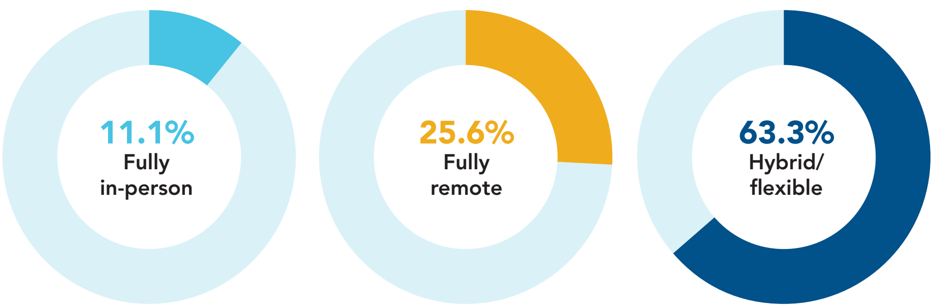
ASSOCIATION STAFFING

Despite the optimistic numbers regarding association staffing by department, 55% said they understaffed when it came to generating non-dues revenue. Another 38% reported they were understaffed when it came to contributing factors for low member engagement.

Overall Association in 2023



What is the Work Environment for Your Association Staff?



A Hybrid Work Environment is the Optimal Option

For the second year in a row, two-thirds of respondents said their staff works in a hybrid environment, while 11% work fully in the office. Interestingly, in 2022, 18.1% worked fully in person, so perhaps the competitive job market made some associations backstep a fully in-person mandate, as it appears many workers prefer the hybrid option. The same goes for the fully remote option – there was an uptick by 10 percentage points from last year for those working from home all the time. This could account for associations casting out their talent search farther – and allowing remote positions within the organization so physical boundaries are not a roadblock to the best job candidate.

CONCLUSIONS

Each year presents opportunities and challenges – and 2023 is no different. While inflation, global conflict and political fallout continue to present challenges to the economy, overall morale and perceived quality of life, there are myriad opportunities we can glean from the better aspects of society and progress. The 12th Association Benchmarking Report of North American associations in mid-2023 found that associations seemed to have successfully rebounded from the effects of COVID-19, honed in on the most effective engagement tools, improved staffing, prioritized non-dues revenue generation, and preferred in-person events over the virtual alternative.

But still, there are association and member needs that require more attention. A discrepancy in staff and outsourcing needs, communications customization, non-dues revenue sources, and better resource integration are some challenges that were apparent in this year's survey results.

Repeating last year's trend, **associations reached out to members via print/digital/social media/video less frequently on average**. Weighing in slightly less than last year, communication frequency dropped, but perhaps this can be explained by associations participating in more in-person events post-pandemic.

While more than half of respondents indicated specific departments were adequately staffed, other staff-related questions uncovered a need for more employees in some situations. The hesitation in outsourcing some of these specific tasks could be due to the No. 1 challenge of generating substantial non-dues revenue – simply not increasing revenue enough to justify hiring more staff or outsourcing various functions.

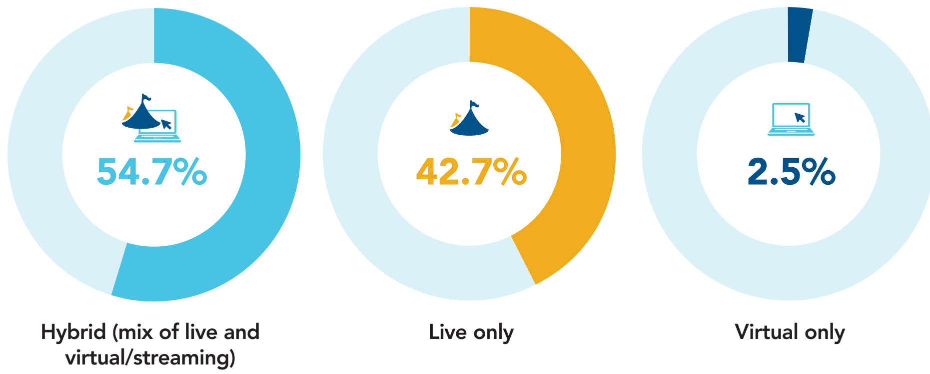
Whatever the challenge or opportunity, it is all about learning how to adapt and seek out the best ways to provide value to your members.

In-Person Connection is Top Priority

Since the pandemic is behind us, associations are eager to be face-to-face, now more than ever, with colleagues to network and learn about their industry. The survey reflected this sentiment with 92% of respondents **ranking traditional conferences, trade shows and face-to-face events as the top valued member engagement tool**, up 10 percentage points from last year. Inversely, virtual and hybrid conferences are not as popular this year, with virtual-only events falling 8 percentage points.

Events are not only the preferential means for connection, but associations also use them to determine member engagement. This year, attendance at events jumped 18 percentage points with 9 in 10 indicating this is the top criteria they assess regarding member engagement. Attendance at conferences and other traditional events helps associations gauge membership participation best as it requires financial commitment and physical presence. While some education and training can be accomplished by video/digital technology, conferencing software has proven an inadequate substitute for the networking that goes on at industry events.

How Does Your Association Intend on Hosting Events in 2023 and Beyond?



Top 3 Most Valued Event Types

92% — Traditional conference/ trade show/face-to-face events

70% — Training & development events

67% — Committee meetings

The Social Mediascape

It's a wild world when it comes to social media engagement. Associations do value the medium, as it ranked No. 5 as a most-valued digital engagement tool for the past two years. However, this year it fell 5 percentage points in engagement value ranking. And not only did its value fall, but specific apps slid down the ranked list of engagement tools. In fact, **LinkedIn was the only social media platform listed in the overall Top 10** most valued engagement tools, as other apps fell out of popularity. One of the highest valued social media platforms in past surveys, Facebook, fell out of the overall Top 10 ranking and lost 9 percentage points.

The proliferation of apps on the market today can be a dizzying reality for associations trying to best align their relevance to member needs. After all, some trade organizations may find Instagram or TikTok more applicable to their member demographics than others. Organizations can struggle with trying to please all member segments but quickly becoming overwhelmed with posting, updating and monitoring a large number of social media accounts in a timely manner. Regarding dedicating staff to social media strategy, half of respondents (48%) appointed one full-time employee to social media content management, while a quarter assigned two to three full-time employees to this task.

One-third of respondents (32%) strongly agree that social media is a high priority for their organization, yet only 12% strongly agree that their social media strategy is well defined (vs. 19% in 2022 and 25% in 2021). In addition, 35% strongly agree that their social media networks have a "single voice," compared to 26% last year.

Engage, Engage, Engage

Overall communication frequency dropped this year, which begs the question, why? Given today's technology allows communication with members 24/7, one has to ponder why engagement would wane from one year to the next. It could be due to several elements: lack of resources and staff, communication strategy, resource integration, and the perception that members are already too busy (51%).

More than four in 10 (44%) participants feel a single strategy is the better tactic when it comes to engaging members. In comparison to last year, platform specific and department dependent methods switched places, with platform specific claiming 24.5% (32.6% last year) and department dependent taking second place with 31.3% this year (25.8% last year).

Engagement tool integration can be beneficial as it enhances collaboration, improves customer experience, and streamlines communication processes. **More than one-third have confidence that engagement tools are "somewhat integrated"** followed closely by 30% who feel they are mostly or fully integrated. A slight increase in respondents (27.5%) believe their member engagement tools are not well integrated or not integrated at all as did a quarter of respondents last year.

While associations are in favor of face-to-face events, which is documented throughout this report, one-third of respondents list print and digital magazines as a crucial medium of engagement. Digital engagement tools take the helm with four in five citing email blasts, association website and e-newsletters as primary tools of member engagement. Online member directories climbed in ranking this year, with nearly half listing these as valuable engagement tools. **Take caution not to dismiss print**, as member magazines and journals climbed 5 percentage points this year in the ranking with 45% of respondents reporting it as a value engagement tool. Furthermore, 41% supplement their print magazine with digital while only 15% replaced print with digital edition. Additionally, the print medium gives associations a different channel in which to reach members, some of whom are tired of sifting through an endless inbox and passively scrolling through their social media feed.

Video engagement is a priority for most respondents (65.2%) who said video is part of their overall content strategy, but video production is also a challenge for 28% of those surveyed. Perhaps that explains why this channel is one of the most outsourced functions, with 35% of respondents who produce video outsourcing. Most (70%) use videos for continuing education – this declined from 74% last year and 77% in 2021, probably because of the return to more in-person meetings and events – while 60% film in-person events.

Providing a customized experience for member subgroups continues to be a challenge, with almost half pointing to the No. 3 ranked factor to low member engagement being "we don't target/segment our communications as well as we should." New members (61.2%), members by category (60.6%) and chapter specific members (40.2%) are most likely to receive tailored communications, while early career members (34.4%) and young professionals (39.2%) are lower on the totem pole. Long-standing members are the least likely (25.5%) to receive specialized communications despite their loyalty. Contradictory to this rundown of customization is that 54% of respondents list "engaging young professionals" as the Top 3 biggest challenge this year.

Noting the desire to engaging young professionals, associations are paying extra attention to career centers/job boards, particularly as various professions and trades are having some challenges in recruitment and retainment. As a benefit to members as well as a potential source for non-dues revenue, this channel should be closely watched in the upcoming years.

Top 10 Engagement Channels

1. Traditional conference/events
2. Email blasts
3. Association website
4. E-newsletter(s)
5. Webinars
6. Training and development events
7. LinkedIn
8. Committee meetings
9. Networking events
10. Annual or regional meetings

Staffing Ups and Downs

Thanks to a buoyant job market this year, associations feel they are staffed appropriately in most areas (over 60% in education, meetings/events and government affairs). The marketing department appeared to be suffering more than other areas, with only 50% indicating it is appropriately staffed. Perhaps this is why respondents this year seemed to remedy some of the challenges they had in the past such as "combating information overload/cutting through the clutter," which was consistently ranked the biggest challenge for consecutive years, but this year less than half reported it as a top hurdle.

Still, there were some hiccups in the results, as **55% said they understaffed when it came to generating non-dues revenue**. Another 38% reported they were understaffed when it came to contributing factors for low member engagement. When asked "If your association received an unplanned 50% increase in annual budget, how would you spend it?" 69% percent opted for hiring more staff, up 10 percentage points from last year. Emerging from COVID-19, many organizations had to reevaluate department structure as some employees left positions to look for other opportunities. This created an abundant yet competitive job market where talent was ripe for picking. However, the surplus of jobs and lack of qualified applicants posed a challenge for some associations.

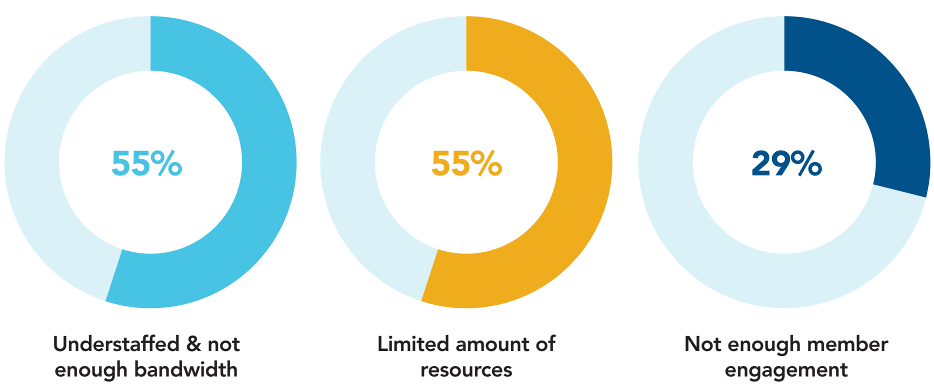
One of the biggest challenges (and opportunities) that resulted from COVID-19 stay-at-home orders was that many organizations developed an efficient plan for remote work. For companies that didn't have an existing plan in place, they were forced to quickly implement one – making them more resilient once the pandemic ended. Perhaps there will never to be a full return back to the office. For the second year in a row, **two-thirds of respondents said their staff works in a hybrid environment**, while 11% work fully in the office. Interestingly, in 2022, 18.1% worked fully in person, so perhaps the competitive job market made some associations backstep a fully in-person mandate back to the office, as it appears many workers prefer the hybrid option.

Non-Dues Revenue is Getting More Attention

The generation of non-dues revenue is the top challenge this year, according to 58% of survey participants. However, this year it seems associations became more proactive in going after untapped dollars. With more than half of participants saying they have limited resources when it comes to increasing non-dues revenue, we also found that nearly double the respondents (23%) are outsourcing advertising sales than they did in 2022 (14%). While that is great news, it appears associations could be neglecting other sources of revenue – with only 18% outsourcing job posting sales, 12% outsourcing exhibitor sales, and 11% seeking help with sponsorship sales (which accounts for 29% of non-dues revenue, according to respondents).

Non-Dues Revenue Top Barriers

(Total exceeds 100% due to multiple response question)



CONCLUSION

An explanation for those not outsourcing sponsorship sales could be that four in 10 respondents, up 5 percentage points from last year, now take a fully integrated approach to selling sponsorships in 2023. Three in 10 associations (33.7%) take a fully integrated approach to exhibit sales (up from 28.3% last year), and one in four (22.2%) now take a fully integrated approach to advertising sales (down 2 percentage points from last year). The dip in an integrated approach to advertising sales this year could be attributed to the outsourcing of advertising – and selling those products a la carte.

To make sense of it all, it helps to take a retrospective glance into the past few years. Associations are setting big goals and strategic objectives after a few years of uncertainty and the constant need to pivot when faced with unexpected challenges. We found back in 2020 that more than half (55%) of respondents recognized a serious or significant problem with the lack of revenue generated from their communication vehicles – 10% higher than the previous year. The same survey also uncovered that nearly 3 in 4 (71%) expected difficulty maintaining pre-COVID levels of advertising, sponsorship and exhibit sales. However, in 2021, significantly less (46%) expected difficulty rebuilding pre-COVID levels of advertising, sponsorship and exhibit sales. It is clear that the sooner associations realize their non-dues revenue opportunities – and take action – the sooner associations and their members will reap the benefits.

Final Thoughts

Naylor emphasizes employing a process of Assessment, Integration and Measurement (AIM) throughout an engagement tool's lifespan. Just as your doctor or accountant sometimes has to tell you news you don't want to hear, it's important to make the effort to measure what you really need to measure, not only what's easiest or most comfortable to measure. When you look at these results and compare them against today's communication best practices, associations seem reasonably aware of their shortcomings and are making progress to close those gaps, but there is still room for improvement. We know hardworking association professionals are aware of many of the communication shortcomings identified in this report, but we'd like to see a greater sense of urgency to fix them.

We're happy to discuss suggestions with you any time.

METHODOLOGY

After consulting with Naylor Association Solutions' senior leadership team, the Association Adviser team, and the executive directors of nearly a dozen state allied societies of association executives, Naylor's research team constructed a 35-question online survey. As has been the case in previous annual studies, the 2023 survey intended to provide association leaders with a comprehensive look at membership engagement trends, best practices and resource investments that would be relevant for membership organizations of all sizes and industries throughout North America.

A proprietary rapid-response platform was used to administer the survey. For multiple-choice questions, respondents were asked to check a single answer that best described their opinion about an association membership engagement tool or issue or to select all answers that applied to their experience with an association challenge or issue. In many cases, respondents were asked to state the degree to which they agreed or disagreed with a question or statement, generally, on a scale of 1 through 5.

Great care was taken to ensure that the survey would be thorough and comprehensive, yet still simple enough to be completed quickly without the need for telephone follow-up or numerous reminders to take part. For those who completed the survey, they had the option to enter for a chance to win one of 50 Amazon gift cards of $100 each. Respondents received their survey results immediately, as well as a 2023 Best Practices Report Card.

In several waves, beginning on April 3, 2023, researchers sent the survey via email to senior staff at North American trade associations, professional societies and association management companies. The respondent pool was composed of Naylor clients and prospects (a mix of small, midsize and large associations), Association Societies Alliance members in 11 states and readers of the Association Adviser e-newsletter.

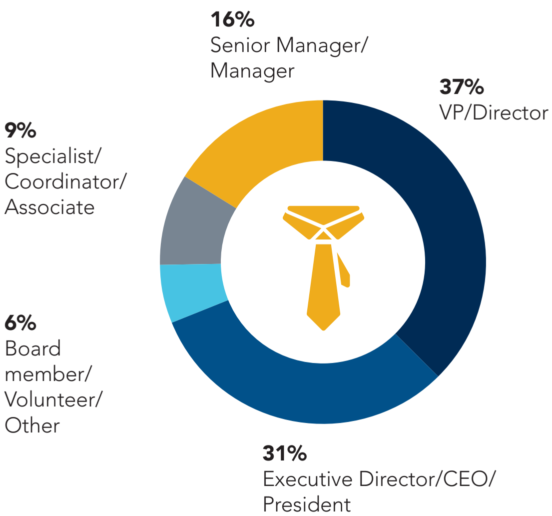
The survey was open only to association or professional society staff members and their respective board members.

To ensure a response pool of experienced association executives and managers, recipients were asked to forward the survey link to the most senior member of their department or organization if they did not feel they met the criteria for "senior management." Follow-up reminder emails were sent to all prospective survey participants one week and two weeks after they received the initial survey invitation. When the survey closed, a total of 308 surveys had been satisfactorily completed, with nearly 37% of respondents identifying themselves at the level of vice president or above.

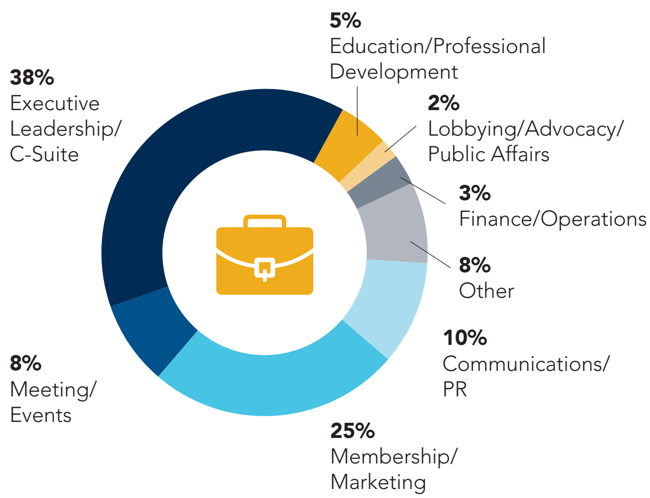
As indicated in the highlights section, this report reflects survey results through the survey closing date of May 7, 2023.

DEMOGRAPHICS

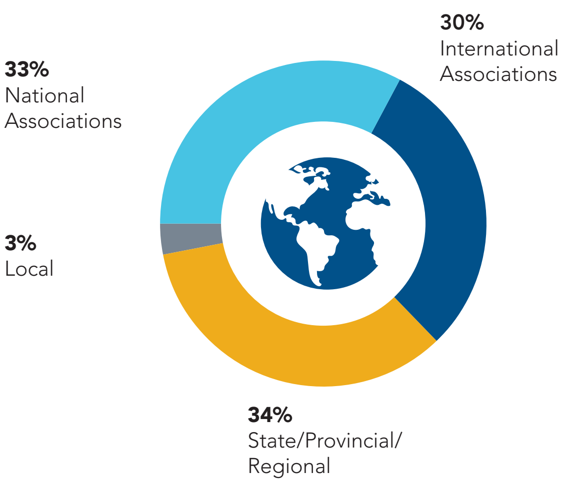
Job Title



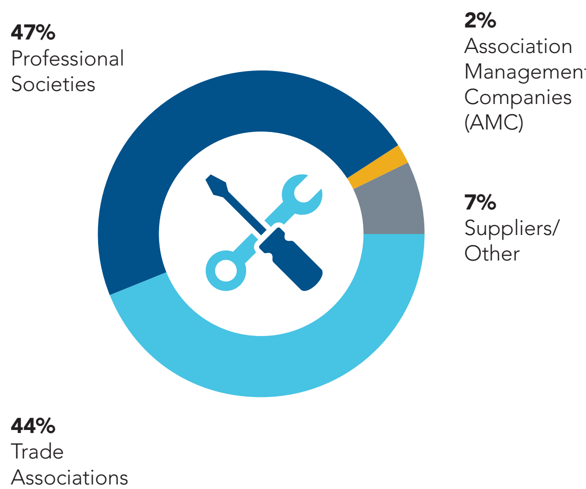
Primary Job Function



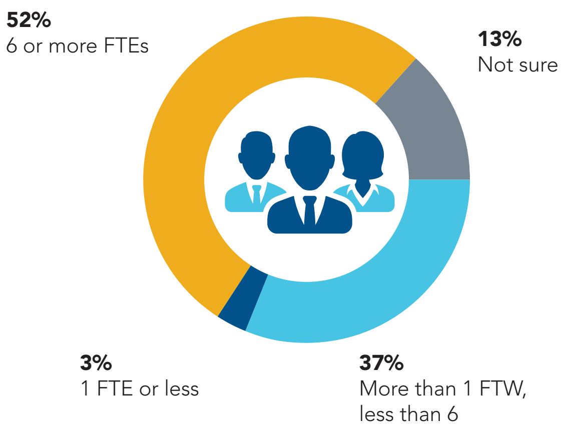
Association Geographic Scope



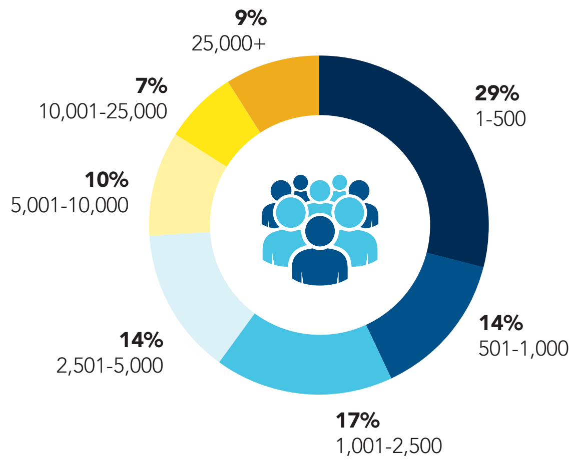
Association Type



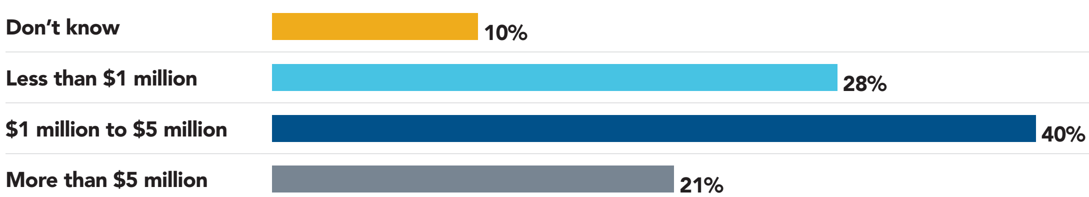
Total Staff



Number of Association Members



Annual Operating Budget



More Than Three Dozen Industries Represented

Respondents came from more than three dozen industries, although five classifications accounted for roughly 50% of the response pool:

RESEARCHERS

Sarah Sain, CAE, Vice President of Content Services, is responsible for the overall strategy, leadership and development of Naylor's content and design teams. In her 12 years with Naylor, Sarah has provided editorial consultation and content strategy for U.S. and Canadian associations across an array of industries. Today, she develops and drives Naylor's content services, which give associations the tools to elevate their communications, increase their member engagement and grow much-needed non-dues revenue. Sarah also serves as a writer and managing editor of Association Adviser, Naylor's flagship media brand that provides valuable research and thought leadership to the association marketplace.

Dani Mihalic, MSM, Vice President of Marketing, oversees Naylor's corporate marketing department and works to fulfill Naylor's strategic marketing plan in areas of lead generation, email marketing, content and collateral creation, branding, online marketing, account-based marketing efforts, data analytics, and martech platform adoption. Throughout her eight years at Naylor, she has worked across departments, which has given her a unique perspective of the association marketplace. Dani has an advertising and public relations undergraduate degree from the University of Central Florida and an international marketing graduate degree from Boston University.

Rachel Brown, Director of Content Strategy, is a lead resource for content strategy and implementation at Naylor. Through the implementation of content strategies tailored to suit association needs, she has fostered knowledge-sharing and collaboration among members in her seven years at Naylor. Her approach has always been anchored in a data-driven understanding of audience behavior, ensuring that specific content resonates with its intended recipients. Rachel has almost 20 years' experience as a senior editor and writer in business media, with seven years in the retail design industry. Rachel has a journalism degree from the University of Tennessee.

Najla Brown, MA, Senior Corporate Marketing Specialist, supports corporate marketing's lead generation and engagement goals to help source new business for the business development and account management teams. She leverages her creative mindset and passion for storytelling while on this team, helping to support Association Adviser and content creation. In her three years at Naylor, Najla has provided support to Naylor's member communications clients. Najla has a journalism and communications bachelors degree and a public relations masters degree from the University of Florida.

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Thank you to our partners

Naylor and Association Adviser would like to give special thanks to the Association Societies Alliance, including the following state societies of association executives:

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