

Industry Study: Association Trends 2020

From Disruption to Opportunity

What members want and how virtual engagement is creating new paths for growth.



A deep dive into member sentiments, engagement, and loyalty – before, during, and after a disruption-filled year.

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Surveys conducted by: **Edge Research**



Overview: Why care about this study?

Keeping up with members' needs has been an ongoing challenge for many professional membership associations. Audience interests and demographics shift. New communications channels pop up. The evolution of technology brings new expectations for online member experiences.

Then came 2020 and the whole world changed

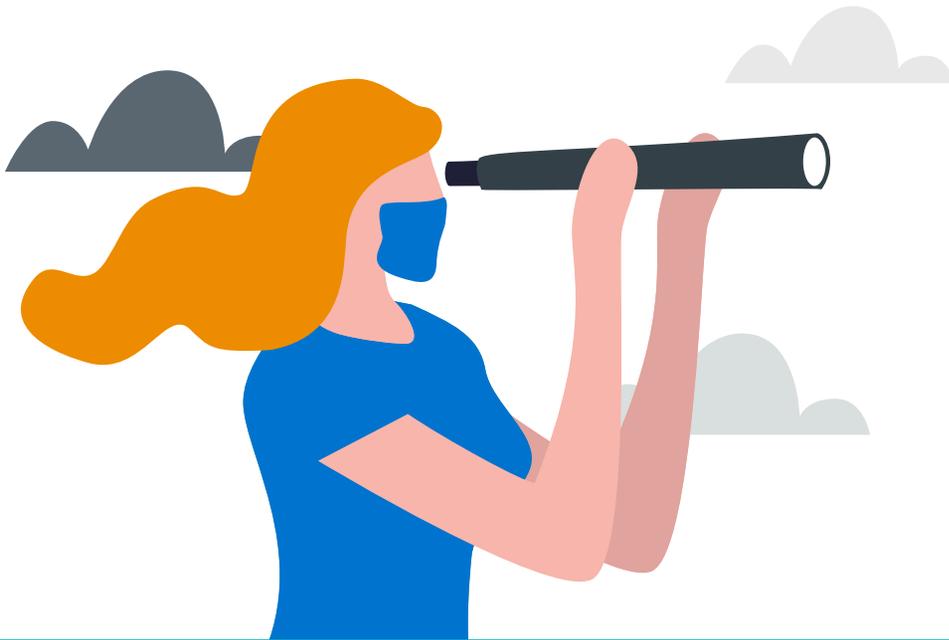
– seemingly overnight. From professional to personal, nearly every aspect of members' lives have been disrupted in some way this year.

Associations had to scramble to move to a work-from-home setting for staff while continuing to provide value to members, but in a virtual environment. In some ways, these steps accelerated a trend toward virtual engagement that was already happening. And now, the question is about how to move forward.



A note about this study: Parallel surveys were conducted with more than 1,000 Members (879 current members, and 148 who lapsed within the last two years) of professional membership organizations in the United States and nearly 400 professionals who work at those organizations (referred to in this report as **"Members"** and **"Pros,"** respectively). The online surveys took place between August 31, 2020 and September 14, 2020. Note that due to rounding, not all percentage totals in this report equal 100 percent.

To help associations gain a better understanding of how to plan for the future, Community Brands built on previous membership and loyalty surveys with this new study. It takes a close look at the impact of the pandemic on member priorities, focusing on key questions, including:



How are members feeling about their professional organization today?



Has member engagement and loyalty changed?



What's important to members now?



How can associations prepare for what comes next?

Findings from this study, paired with trend data from previous Community Brands studies, show that while member loyalty remains strong, some member priorities have shifted – giving associations multiple opportunities to deliver new and increased value at a time when members need it most.

Here is a detailed look at the findings.

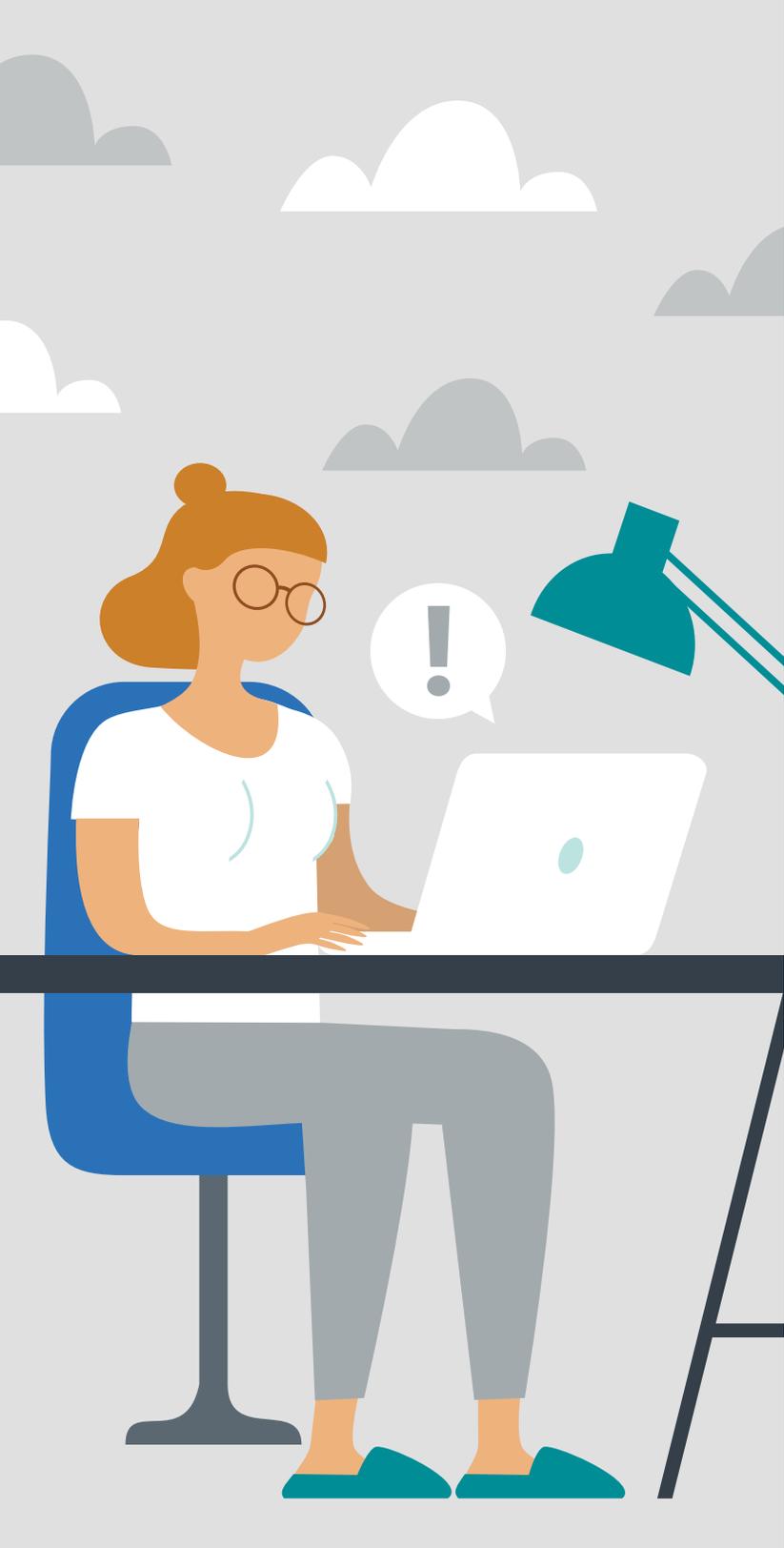
1

Member engagement is growing and loyalty remains strong despite the challenges of this year, offering multiple opportunities for professional membership organizations to continue delivering value.

Half of Members believe their organization is more important today than before the pandemic (51 percent say it's more important, 39 percent say the same, just 7 percent say less). They look to the organization as a resource on several fronts, including industry information, training, certifications/credentials, and networking.

Meanwhile, younger Members, who have traditionally been the most difficult to retain, are among the most engaged today. African American and Hispanic Members (who skew younger) are more engaged than their White counterparts and are more likely to view their organization as more important now than before the pandemic. Associations have an opportunity to excel by providing more of the benefits these members seek not only today, but also in the future.





2

The events of this year have led to a shift in importance of many benefits in Members' minds, but Member priorities do not always align with organizations' focus.

Members are most focused on "must-haves," including industry information and raising awareness – both considered more important now than before. Pros' focus is in line with these priorities.

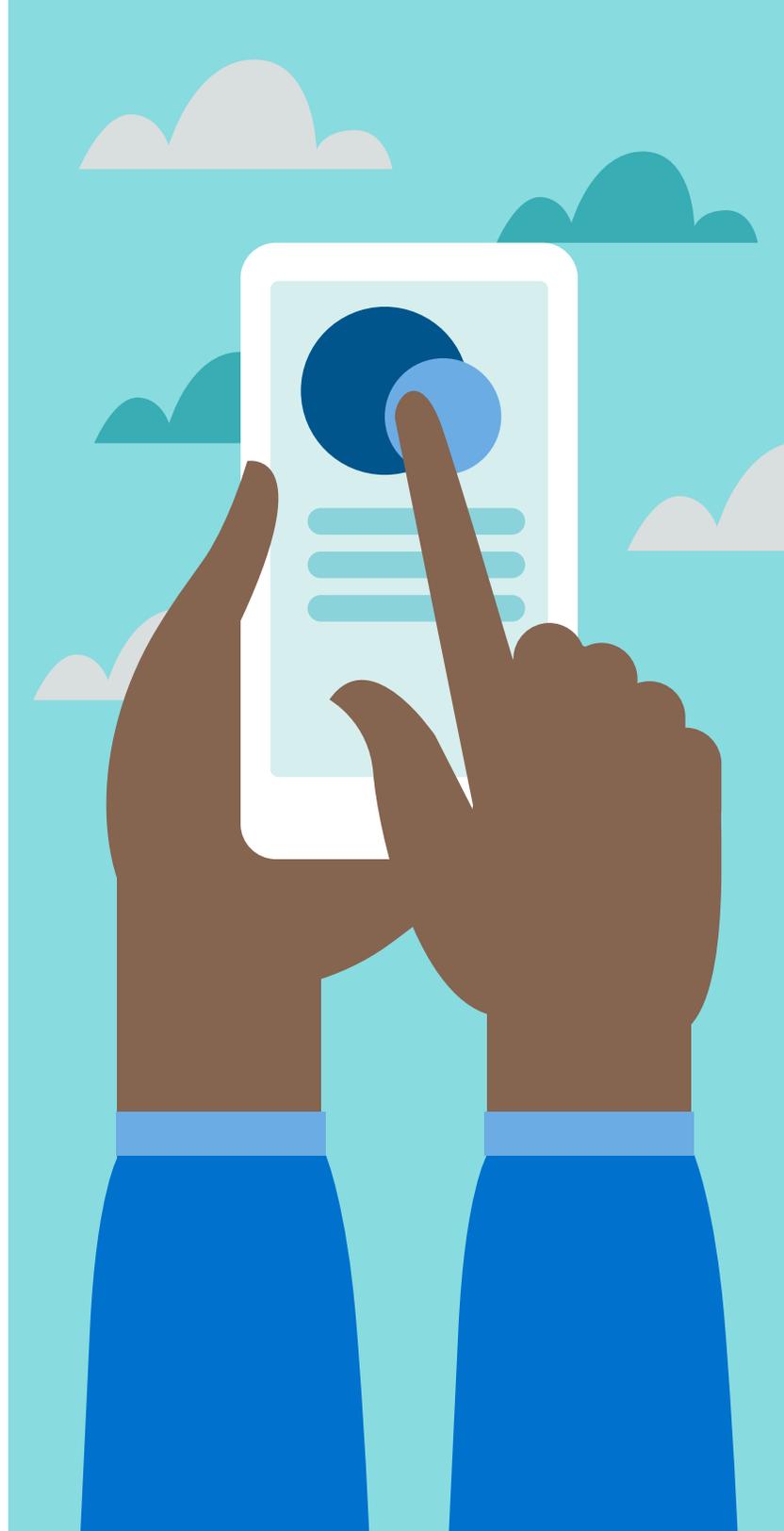
On the flip side, training, certifications, networking, and fueling innovation in the industry rose in importance to Members this year, but continue to be undervalued by Pros. In open-ended responses, Members explain that they are seeing return on investment in the career advancement that comes from certifications and trainings.

3

A primary reason Members are engaging more is because their professional membership organization is offering more virtual opportunities. They believe virtual engagement is here to stay, but the best ways to engage online are up for debate.

Meetings and conferences remain at the top of the list of the ways Members have been involved with their organization, and a majority of Members see virtual conferences as a substitute for in-person events during the pandemic. However, Pros overestimate the importance of both to Members. Members are engaging but there is an opportunity to continue evolving these types of events to best meet Member needs.

Members place increasing value on other virtual ways to connect and learn year-round. In fact, Members who are interacting with their organization more than ever before place greater emphasis on online networking, online continuing education, and social networks than on large virtual events or webcasts. Offering more of these types of smaller, more personalized options are key to keeping Members connected and loyal.



Section 1

Member sentiments, engagement, and loyalty

Members were asked to think about the one professional membership organization most important to them, and then evaluate its importance now compared to before the COVID-19 pandemic. They were also asked how the pandemic has affected how much they interact with their organization.

Half of Members believe their organization is more important since the pandemic, and few see it as less so. Thirty-nine percent say they are interacting with their organization more than they did before; only a quarter say less.

Importance of organization to Members compared to before COVID-19 (current Members)

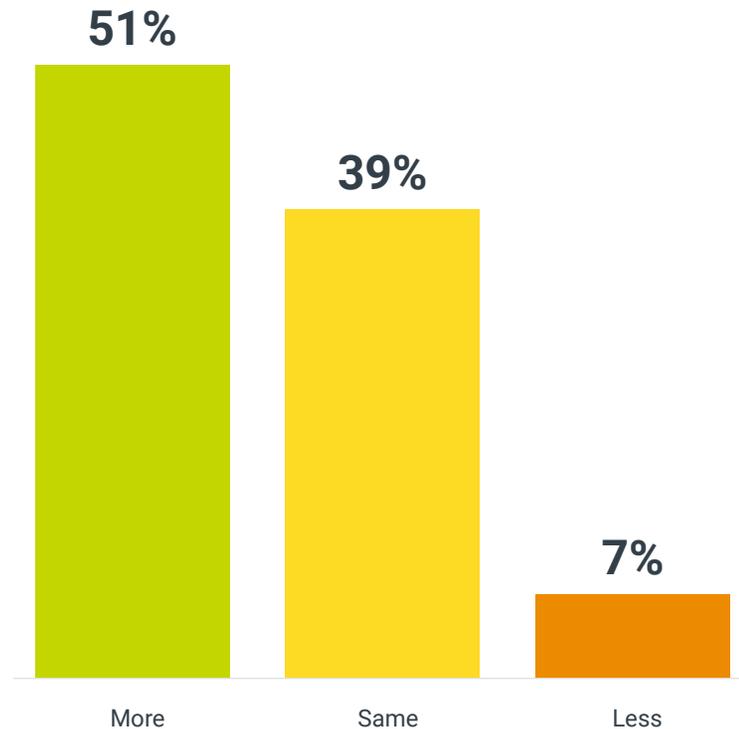


Figure 1. Question asked: How important do you feel your professional membership organization is now, compared to before the COVID-19 pandemic?

Member interaction with organization compared to before COVID-19

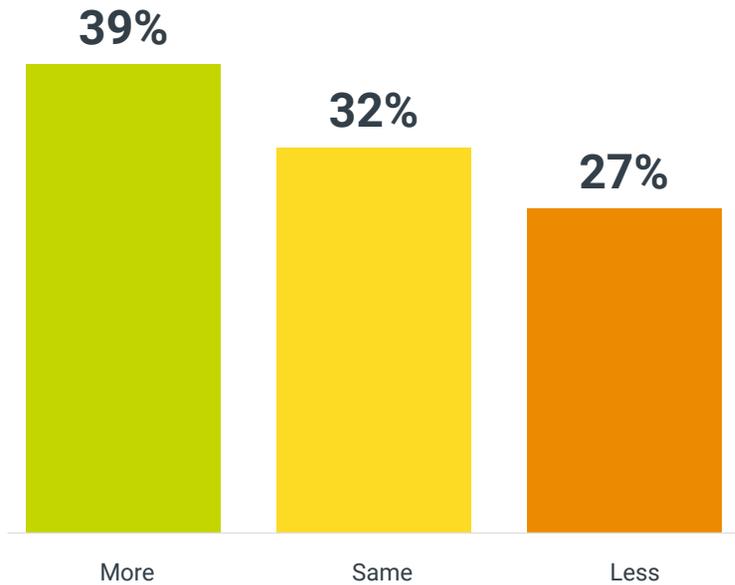
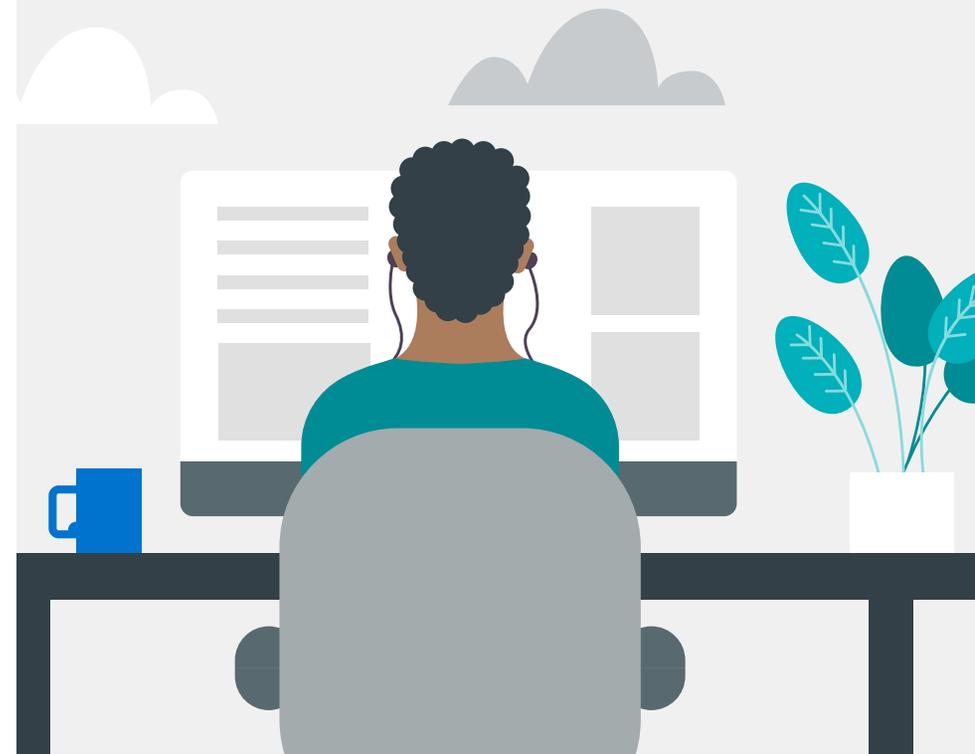


Figure 2. Question asked: How has the COVID-19 pandemic affected how much you interact with your professional membership organization?

Audience drill-down

Some groups of Members in particular find their organization more important and are more engaged with their organization, including: younger Members, those in the early-to-mid stages of their careers, African Americans, Hispanics, and those in the IT industry.



As in previous studies, current Members were asked to evaluate their organization. Scores held steady from 2019 across four key brand indicators: Net Promoter Score, connection, likelihood to renew, and satisfaction. Despite the events of this year, members seem to be as loyal as in recent years.

In this study, 74 percent of Members whose employers pay for all or part of their membership dues say they would still renew even if their employers stopped contributing.



Member loyalty metrics over time

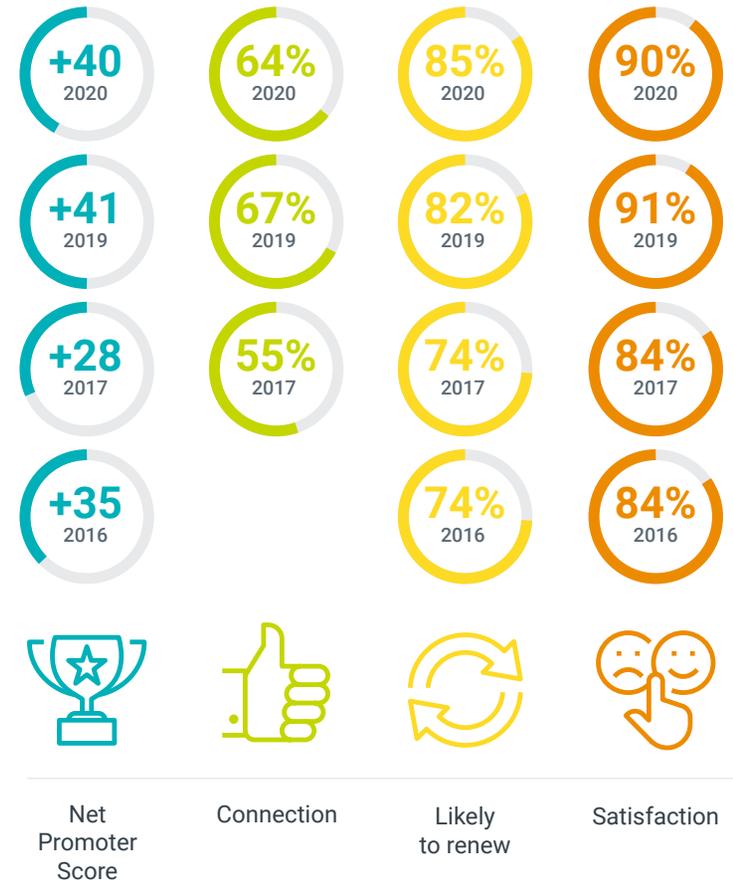


Figure 3. Questions asked: How likely are you to recommend this professional membership organization? | On a scale of 1 to 5, where 5 means extremely connected and 1 means not connected at all, how connected do you feel to this professional membership organization and the work that it does? | How likely are you to renew your membership in this professional membership organization after your current membership expires? | Overall, how satisfied are you with your membership in this professional membership organization?

When asked which sources they are most likely to use for various needs, Member responses suggest they see their professional organization as a trusted source for professional education/training, networking, and community. These findings point to an opportunity for organizations to make the most of this trust by solidifying relationships with members who traditionally have been more difficult to engage.



Where current Members go for various needs (top 5 sources)



Professional community

- 1 **74%** Professional organization
- 2 **69%** LinkedIn
- 3 **57%** Facebook
- 4 **34%** Chamber of Commerce
- 5 **30%** Social club



Networking

- 1 **60%** Professional organization
- 2 **55%** Google
- 3 **54%** LinkedIn
- 4 **46%** Facebook
- 5 **23%** Instagram



Professional education/training

- 1 **49%** Professional organization
- 2 **41%** Employer
- 3 **31%** College/University
- 4 **29%** Google
- 5 **29%** LinkedIn

Figure 4. Questions asked: Which of the following are you most likely to use to find a professional community? Please select and rank your top 3. | Which of the following are you most likely to use to find out about professional and networking events (in person or online)? Please select and rank your top 3. | Which of the following are you most likely to use for professional education and training? Please select and rank your top 3.

The types of ways Members engage with their organization is similar to 2019 in most areas: Completing a certification/accreditation program and continuing education classes remain at the top of the list. Continuing education classes are more prevalent among late careerists.

Perhaps more interesting are some of the open-ended responses provided, which shed light on why Members value the engagement:



Member quotes on the importance of continuing education, certifications, and trainings



Figure 5. Question asked: In which of the following ways have you been involved with your professional membership organization/s? Please select all that apply. Why have you [insert chosen activity]? What motivated you to do this?

Audience drill-down

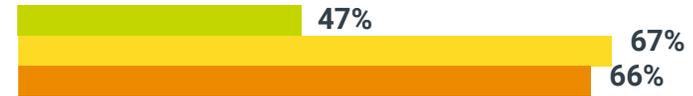
When compared to White Members, African American and Hispanic Members are younger and more engaged. They also believe their organization is more important now than before the pandemic.



Very important for organization to provide industry-specific information related to COVID-19



Organization is somewhat or much more important now compared to before the pandemic



Interact more than pre-COVID



White African American Hispanic

Figure 6. Questions asked: Below is a list of benefits that being a member of a professional membership organization might provide. For each, please indicate how important that benefit is to you. | How important do you feel your professional membership organization is now, compared to before the COVID-19 pandemic? | How has the COVID-19 pandemic affected how much you interact with your professional membership organization?

African American, Hispanic, and White Members all view industry information as the top benefit, yet African American and Hispanic Members value industry information at much higher rates. African American Members value raising awareness 14 percentage points, and advocacy 11 percentage points, higher than White members. Hispanic Members value training 16 percentage points higher, and advocacy 9 percentage points higher, than White Members.

Section 2

What members value today

Members say that several benefits have increased in importance this year. Benefits that majorities of Members say have increased in importance include those that keep the public and Members themselves informed about their industry, as well as advocacy, training, and their organization gathering feedback from them.

Importance of benefits before the COVID-19 pandemic



Figure 7. Questions asked: Below is a list of benefits that being a member of a professional membership organization might provide. For each, please indicate how important that benefit is to you. | Here's that same list of benefits you saw earlier. How has the COVID-19 pandemic affected how important each of these benefits is to you?

A look at results from this study and trend data from past Community Brands studies shows that some benefits jumped in relative importance, including certifications/credentials, networking, and fueling innovation in the industry. Certifications/credentials moved up five spots, and fueling innovation jumped up three spots. Networking saw the largest gain with an increase of seven spots.

In comparison, Pros underestimate the value of some individual benefits to Members, including training and certifications. At the same time, Pros over-value areas such as representing interests and gathering feedback from members (though Members do say that gathering feedback has grown in importance). These disconnects suggest that Pros might be mistaking the daily operational tasks they must accomplish with what members truly value.

Top 10 most important benefits (Current Member and Pro viewpoints)

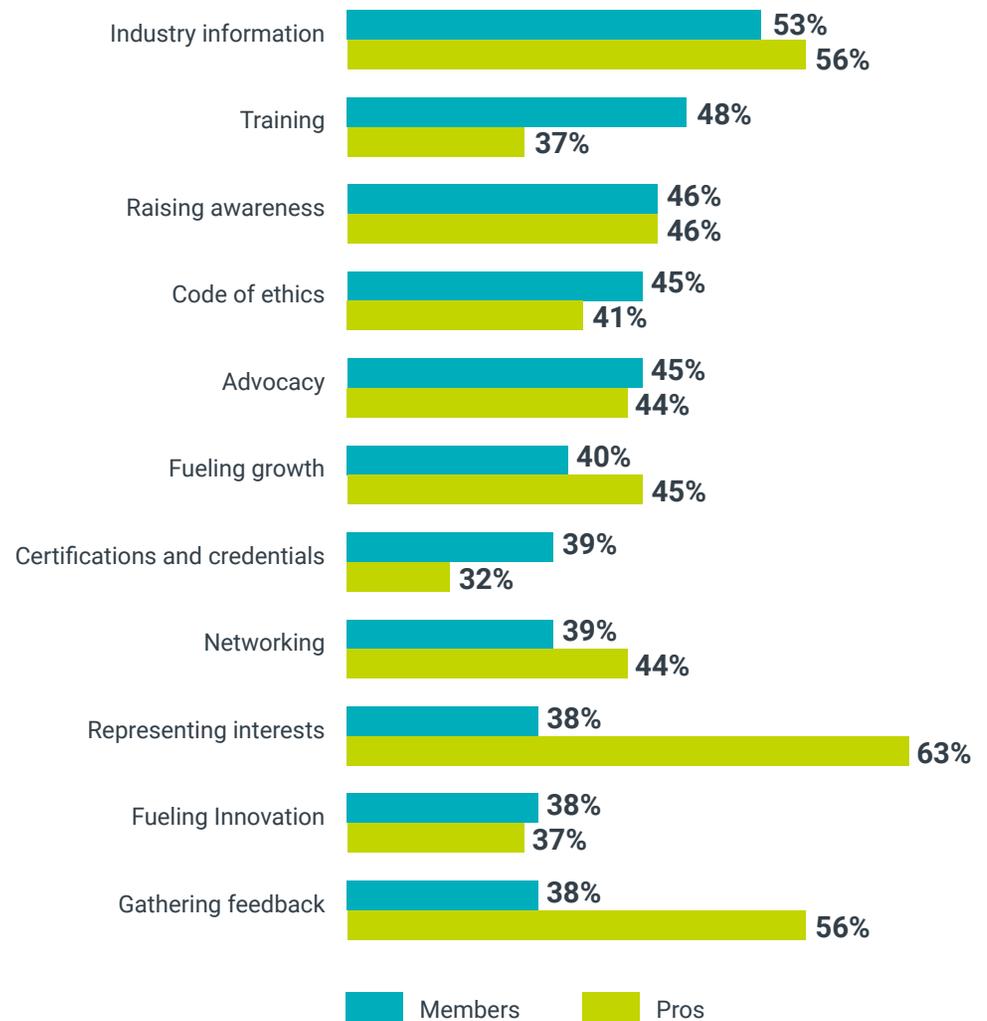


Figure 8. Questions asked: Below is a list of benefits that being a member of a professional membership organization might provide. For each, please indicate how important that benefit is to you. | Below is a list of benefits that a professional membership/trade organization might provide to its members. For each, please indicate how important you feel that benefit is to your organization's members.

Secondary benefits remain relatively consistent compared to 2019. As in past years' studies, Pros continue to overestimate the value Members place on professional family and meetings/conferences, and underestimate areas including job opportunities and help with career advancement.

Benefits including training, education, and networking are important and/or increasing in importance to Members. Interestingly, much of the programming at meetings/conferences includes these activities, yet meetings/conferences rank lower in the list of relative importance. This paradox suggests it might be time for associations to rethink their approach to meetings/conferences by elevating and delivering more of the benefits members seek throughout the year and through other channels.

Tier two benefits (Current Member and Pro viewpoints)

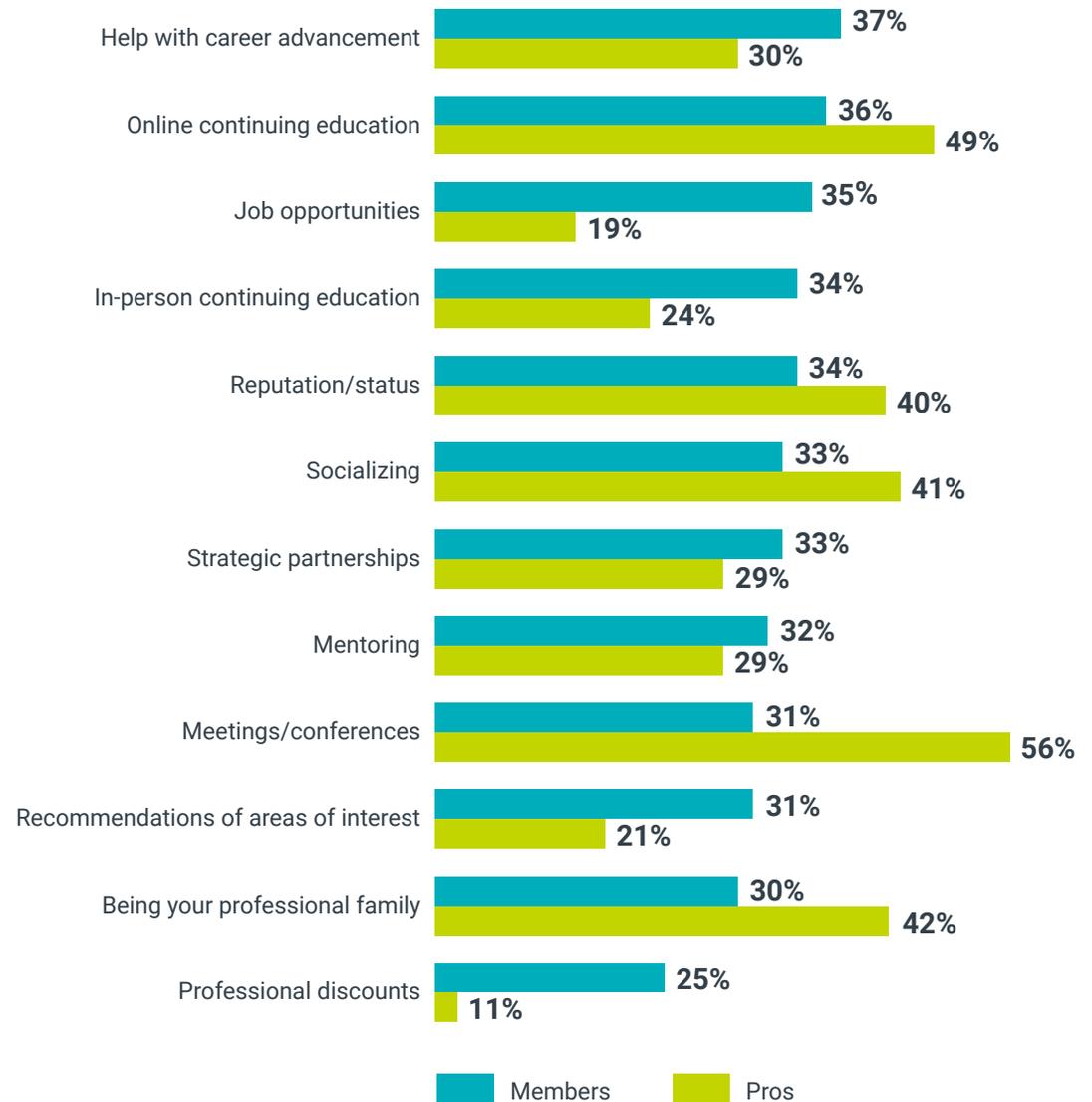


Figure 9. Questions asked: Below is a list of benefits that being a member of a professional membership organization might provide. For each, please indicate how important that benefit is to you. | Below is a list of benefits that a professional membership/trade organization might provide to its members. For each, please indicate how important you feel that benefit is to your organization's members.

The study responses also suggest that Pros might be under-investing in key benefits that Members say are their top priorities, including raising awareness, training, advocacy, and certifications.



% of Pros who will invest more since COVID-19



Figure 10. Question asked: Since the COVID-19 pandemic, will you make any changes in the next 12 months to how you invest in each of the following...

Audience drill-down

This study shows that some Member priorities differ based on career stage. While industry information and raising awareness are important across career stages, advancement benefits, such as training and networking, are more important for those early in their careers. Those later in their careers are more likely to value industry benefits, such as advocacy and codes of ethics.

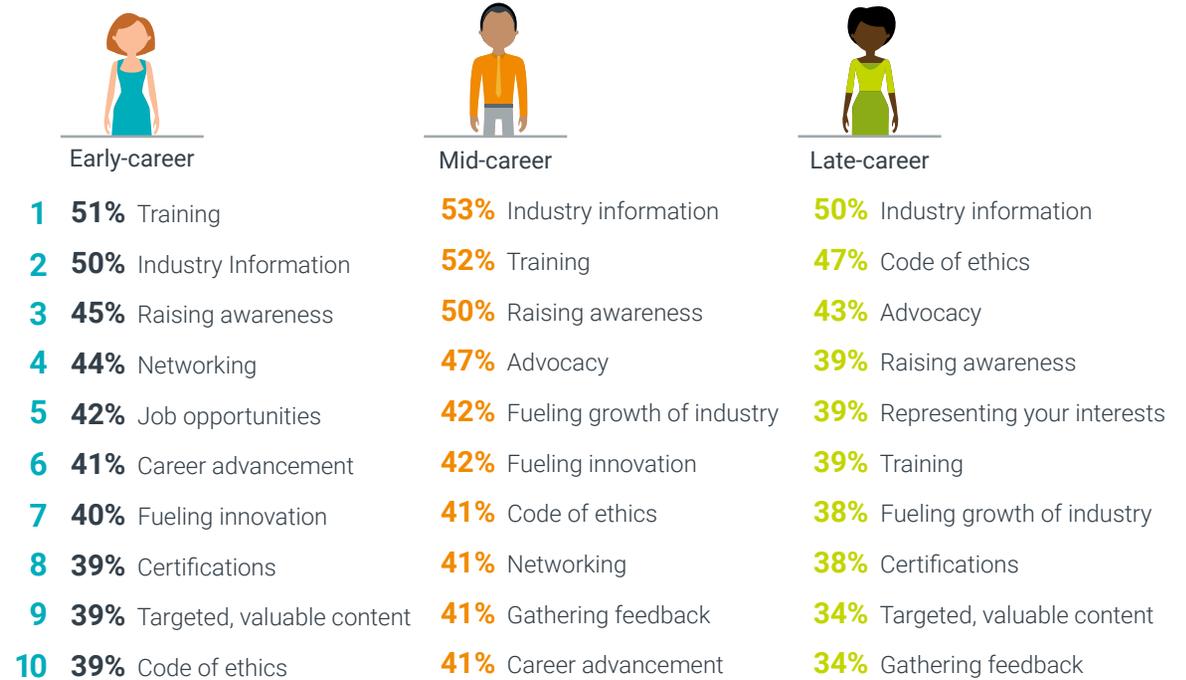


Figure 11. Question asked: Below is a list of benefits that being a member of a professional membership organization might provide. For each, please indicate how important that benefit is to you. Would you say it is...

Findings from Community Brands research show that most Members join a professional membership organization early in their careers – as a student, a new graduate, or within the first five years of employment. This points to an opportunity for associations to focus on early careerists' top priorities to boost member recruitment.

Section 3

Virtual engagement – today and tomorrow

When asked why they are interacting with their professional membership organization more than they used to, 48 percent of Members who indicate an increase in interaction say it is because the organization is offering more online resources. Twenty-six percent say it is because the organization is more relevant/necessary given the current circumstances, while 24 percent say it's due to both reasons. This suggests that as associations offer more virtual ways to connect, members will look to take advantage of these benefits.

There is a strong correlation between those who are most loyal and those who cite an increase in online resources as the reason for their increased engagement.

Why Members who are interacting more are doing so

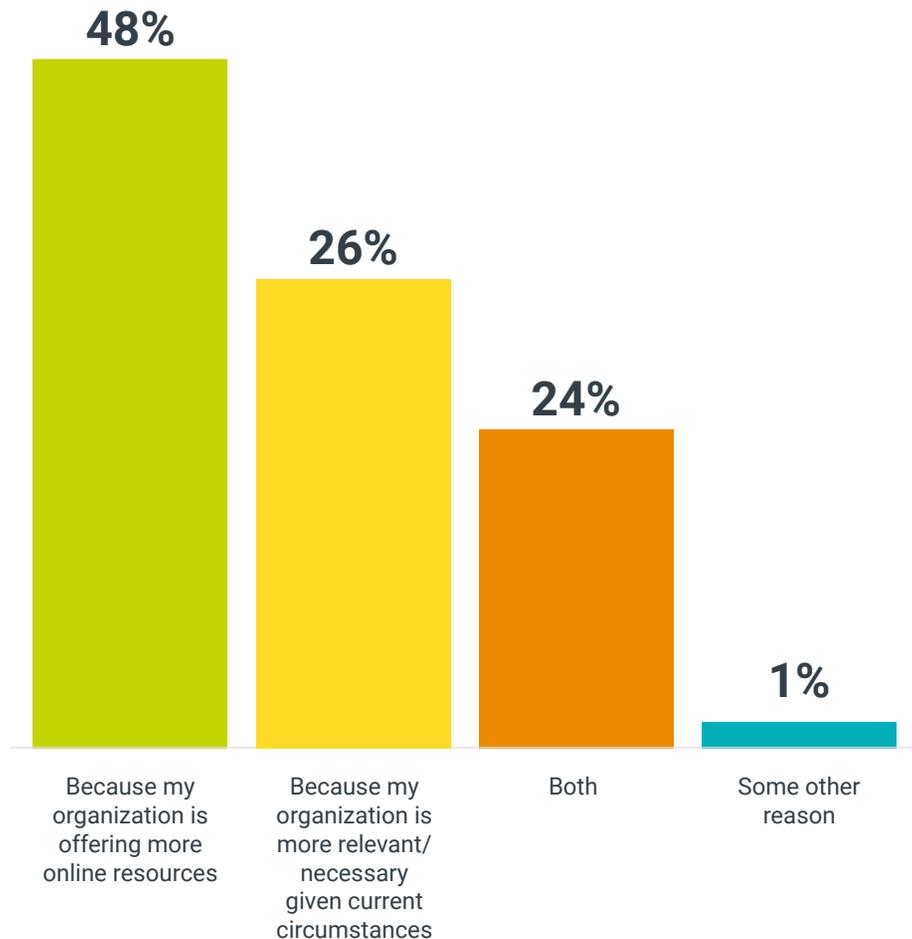


Figure 12. Question asked: You indicated that you are interacting with your professional membership organization more than you used to. Why is that?

Members' outlook on virtual engagement indicates that they expect it to stick around. A slight majority of Members (especially those early in their careers) say they were already engaging online some or all of the time before the pandemic. Roughly the same percentage say they will continue to engage all or mostly virtually after the pandemic.

The shift toward greater virtual engagement appears to be coming from Members who previously engaged more or entirely in person and now say they will be moving toward a balance of in-person and virtual engagement after the pandemic. This change is negligible among Generations Y and Z and those early in their careers, yet is significant among Generation X and Boomers and those in mid-to-late career stages.

Anticipated shift in virtual and in-person engagement before and after COVID-19

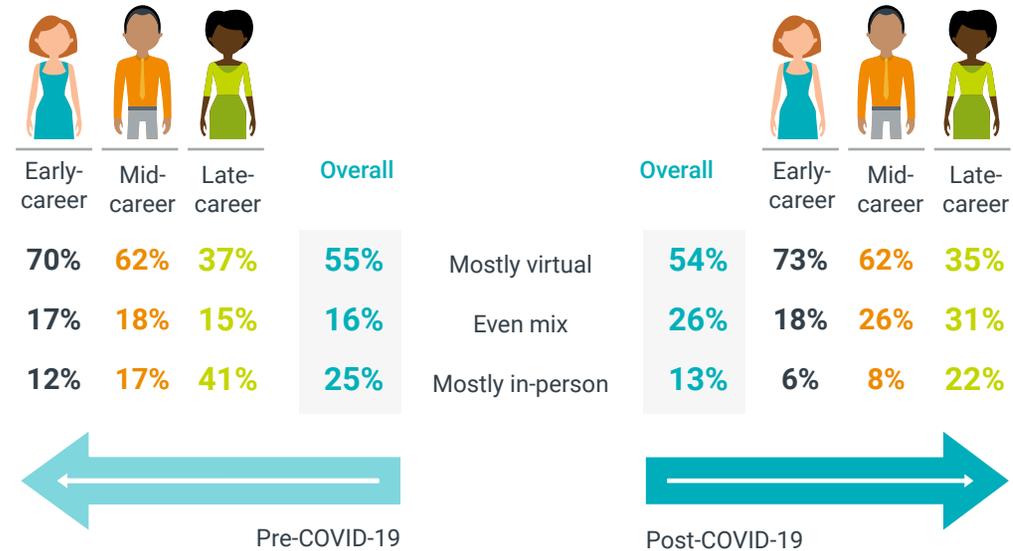


Figure 13. . . . Questions asked: How did you typically engage with your professional membership organization before the COVID-19 pandemic? | How do you think the COVID-19 pandemic will affect how you engage with your professional membership organization in the future, once it's over?

Members who are interacting with their organization much more now than before the pandemic have found multiple online opportunities very or somewhat helpful during the pandemic. Online networking, online continuing education, and social networks top the list.



Most helpful channels for building community and sharing information during COVID-19 among members who are interacting much more

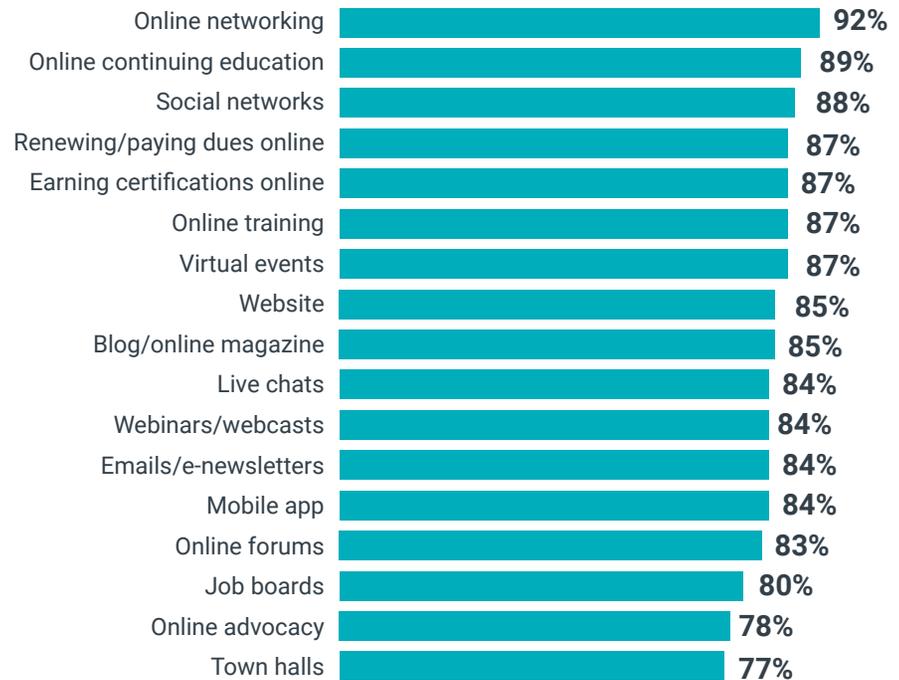


Figure 14. Questions asked: Here are some specific ways that professional membership organizations might use technology to continue to build community and share information during COVID-19. Please indicate how helpful each has been for you during the pandemic. | How has the COVID-19 pandemic affected how much you interact with your professional membership organization?

In looking at opportunities that have been most helpful across all Members, findings suggest that Pros underestimate the importance of personal opportunities, such as online networking and certifications. Meanwhile, Pros overestimate the importance of broader online events, which might be a result of the relative newness of virtual events as many associations had to choose between cancelling an in-person event and moving it to a virtual event.

Most helpful channels for building community and sharing information/driving virtual engagement among members during COVID-19

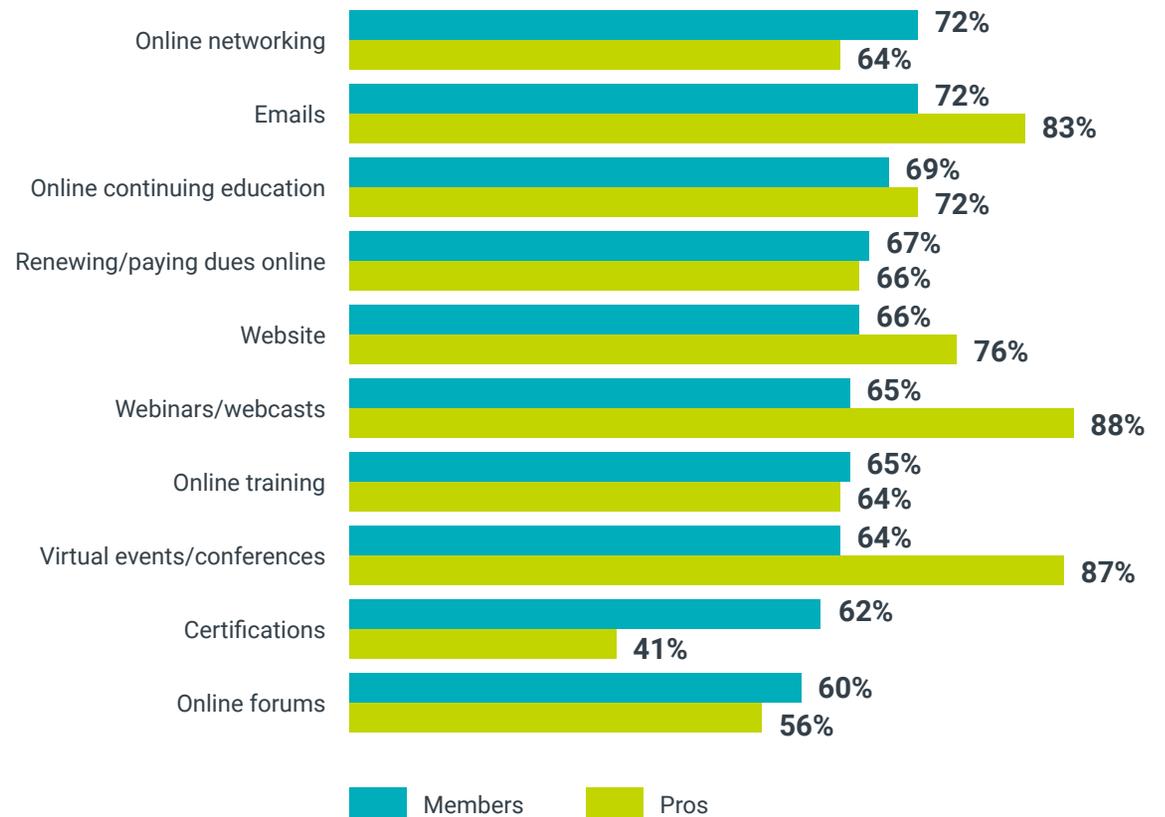


Figure 15. Questions asked: Here are some specific ways that professional membership organizations might use technology to continue to build community and share information during COVID-19. Please indicate how helpful each has been for you during the pandemic. | Here are some specific ways that professional membership/trade organizations might use technology to build community and share information during COVID-19. Please indicate how helpful each has been in driving virtual engagement during the pandemic.

Findings also suggest that while Members do not see the *same* value from virtual conferences and classes as in-person offerings, they do recognize the benefits of these virtual events. Fewer than half of members agree that virtual conferences and classes offer the same value as in-person events, yet majorities do agree that convenience makes up for any loss of value. Nearly three-fourths of Members say that virtual conferences are a good substitute when in-person events are not possible.

At the same time, Pros underestimate the value of virtual conferences and classes compared with in-person, while overestimating the potential of virtual events as the only substitute for in-person events. Again, Pros' views might be a result of being forced by circumstances to move a planned in-person event to a virtual event, versus taking a longer-term view of the overall place of virtual activities in member engagement.

Perceptions of virtual events (Member and Pro viewpoints)

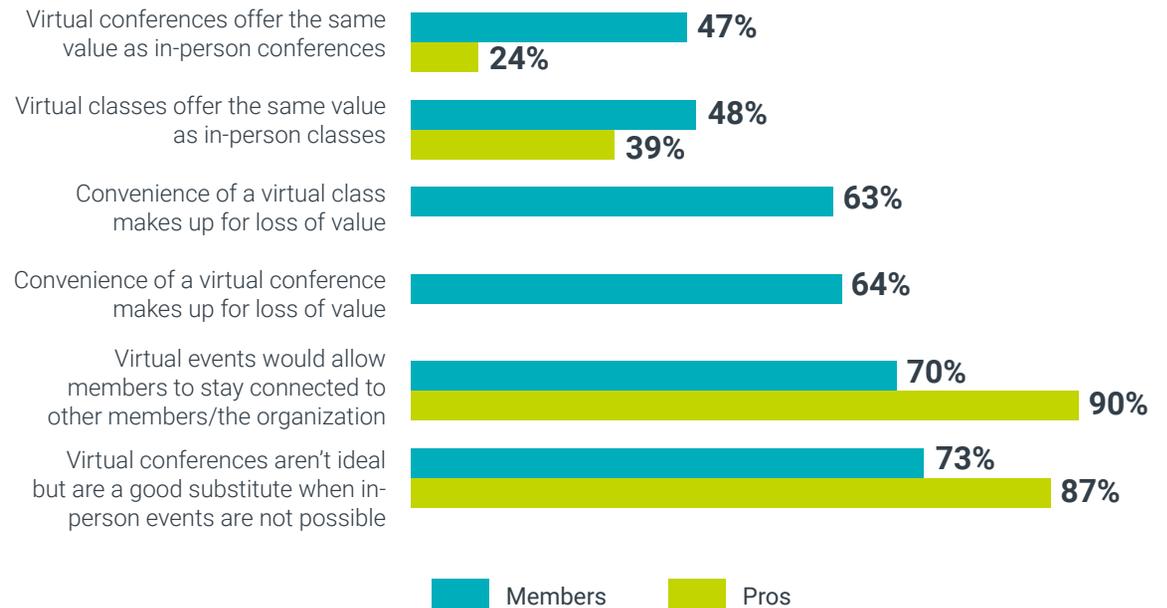


Figure 16. Questions asked: Please indicate how much you agree with the following statements about virtual events, courses, and conferences offered by your professional membership/trade organizations. | Please indicate how much you agree with the following statements about virtual events, courses, and conferences offered by professional membership organizations. Please answer to the best of your knowledge, whether you have attended these kinds of events before or not.

Section 4

Where do you go from here?

In a year full of disruptions, Member sentiments toward their professional membership organization remain positive. Members have become more engaged, and many benefits have become more important in today's environment.

Here are six ways to turn the data from this study into practical steps to take advantage of this unique time for your organization:



1

Get ready for virtual engagement to stick around. A majority of Members have been engaging virtually and expect to continue. Members who have become more involved have done so because their organization is offering more online resources. Even Members who used to engage more or entirely in person now say they will be moving toward a balance of in-person and virtual engagement. To keep pace with this momentum, be sure to evaluate your programs and benefits and determine what new virtual offerings you might provide.

2

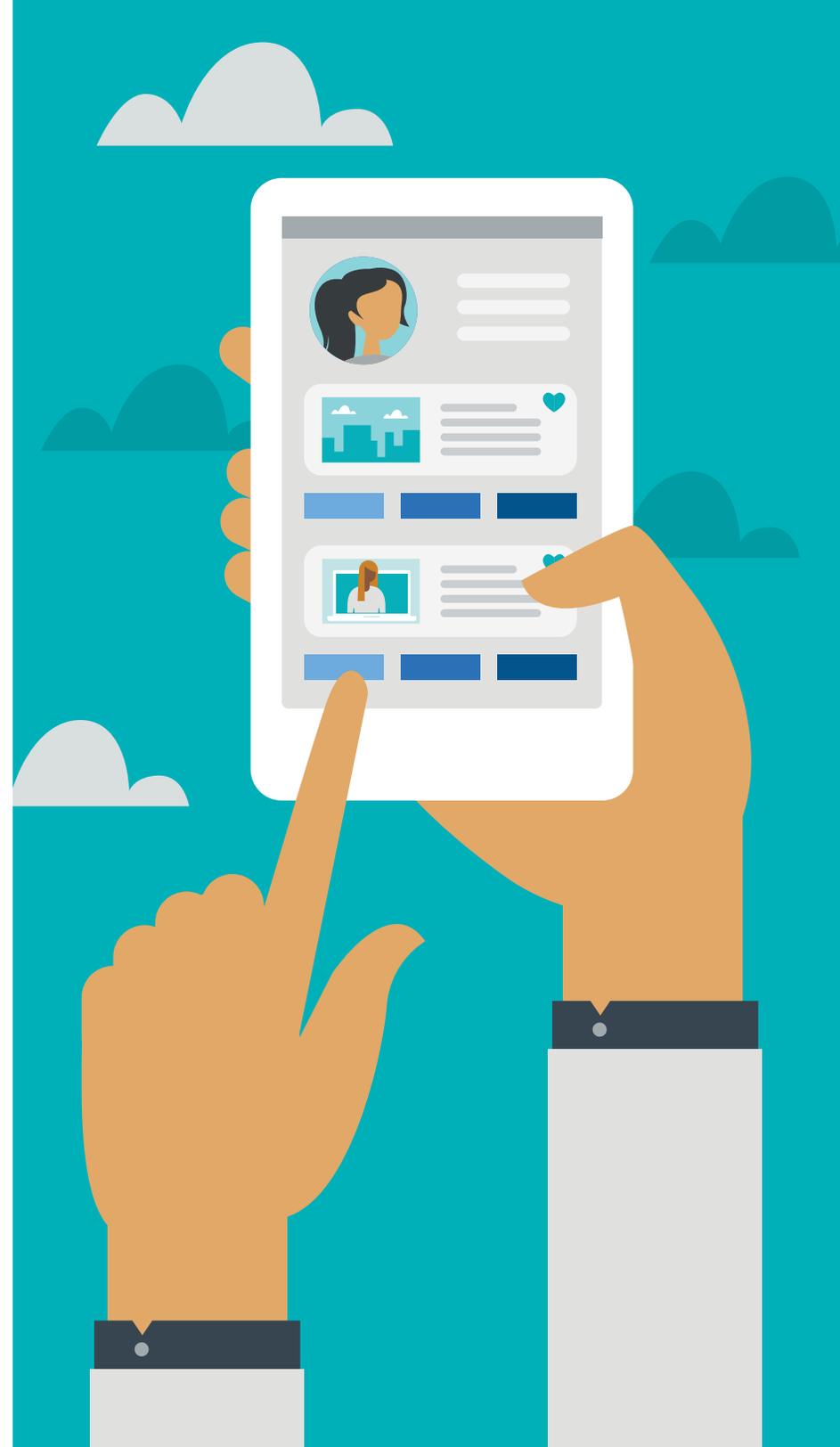
Invest in your training and certification program. Training and certification are two of the most important benefits to Members, yet organizations tend to undervalue them. Take time to review your training and certification programs. Remember that while you might have moved your annual conference to a virtual conference in 2020, it's still important to engage members in a variety of year-round learning opportunities to address members' budgets, schedules, educational and certification needs, and learning preferences. The findings suggest that also offering some of these more personalized opportunities align with member mindsets today.

3

Don't hand your membership engagement over to social media platforms. Among Members who are interacting more with their organizations today, social networks are one of the top three channels for building community and sharing information. Don't let that engagement opportunity slip over to Facebook or LinkedIn. Become part of your members' daily social networking habits by providing an online member community where members can find industry information, network with your organization and other members, and share ideas.

4

Give your online career center more attention. This study's findings suggest that organizations continue to undervalue career advancement and job opportunities as member benefits. If you think about your online career center as simply a place for job postings, you're missing out on an opportunity to engage more with members and give them more of the value they seek. Your online career center should offer a wealth of career advancement opportunities and resources for your members, which is especially helpful when the economy is in flux.





5

Strengthen your work around diversity, equity, and inclusion (DEI). In today's environment, diverse Member audiences are becoming more engaged with their organization. If you already have a DEI initiative in place, consider how your organization can provide programming and leadership opportunities that connects with diverse groups and encourages loyalty. If you don't, consider starting a DEI initiative and be sure to include diverse audiences as part of your work.

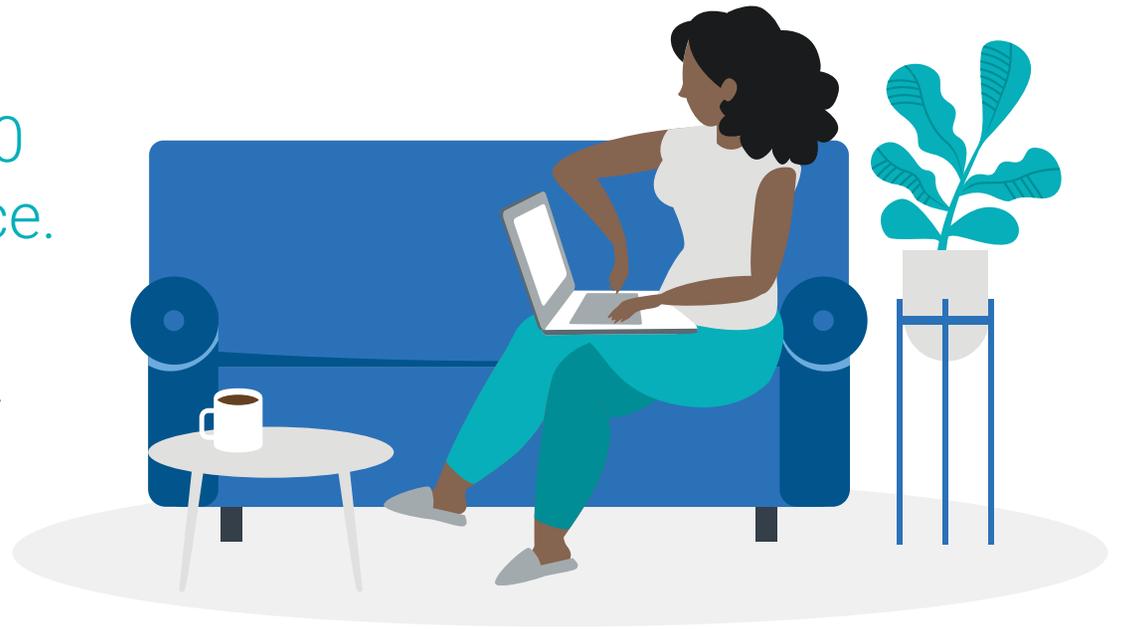
6

Keep listening. When it comes down to it, there's no better way to know what your members want than to ask them. Send a periodic survey to gather their thoughts and ideas about your organization's programs and benefits. Read what they're saying in your online community, and participate in the conversations to spark more feedback. Consider hosting focus groups with diverse audiences of members (race, career stage, job role, length of time as a member) to find out more about their needs and how you can continue to deliver value for years to come.

Put the insights from the 2020 Association Study into practice.

Explore how Community Brands can help your association stay ahead of the trends.

Let's chat



Survey methodology

Commissioned by Community Brands, Edge Research conducted an online survey of 1,027 U.S. Members (879 current Members and 148 who lapsed within the last two years) who self-reported they are 18 years old or older and a Member of a professional membership organization. Survey respondents were recruited through an online non-probability sample, meaning findings are not projectable to the larger population of members. The term "Members" refers specifically to those who were surveyed. Quotas were set so the survey is representative of key demographics. A parallel online survey was conducted among 370 professionals who work in these organizations. Survey respondents were recruited using Community Brands lists, which is, too, a non-probability sample. The terms "Professionals" or "Pros" refers specifically to those who were surveyed. The surveys were in the field during August and September of 2020.

About Community Brands

Community Brands is the leading provider of cloud-based software and payment solutions for associations. The Community Brands Association Suite is the industry's most complete set of software solutions consisting of association management software (AMS), learning management software (LMS), career centers, event management, and payment solutions. Associations of all sizes use this integrated software suite to increase revenue, improve efficiency, and create lasting member experiences. To learn more, visit communitybrands.com/associationsuite and follow us on Twitter or LinkedIn.



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