

Benchmark Report

Preparing for 2021 and Beyond

How associations can adapt and succeed after a year of disruption



A look at associations' sentiments and outlooks after a disruption-filled year.

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Surveys conducted by: **Edge Research**

Overview:

Why care about this study?

This year has been anything but typical. Like many companies and organizations, associations have had to re-think and re-tool. From moving staff to a work-from-home setting to delivering member value in a virtual environment, 2020 has been filled with disruption.

This environment raises questions for association professionals about how they should be preparing for what comes next, including:

- How are professional membership organizations faring in this time of uncertainty?
- What are association professionals' top priorities?
- Are they expecting growth?
- What should be done now to prepare for the future?

Community Brands set out to answer these questions (and more) as part of a recent association industry study. The study included parallel surveys of more than 1,000 members 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.

This report pairs findings from the surveys with trend data from previous Community Brands studies to provide insights into what association professionals are thinking about their organization's future.

It turns out that Pros are optimistic about what's to come, but they still face some challenges.

Here is a detailed look at the findings.

This benchmark report is a companion to the industry study, [Association Trends 2020: From Disruption to Opportunity](#), which spotlights the impact of this year's pandemic on member sentiments, engagement, and loyalty.



Note that due to rounding, not all percentage totals in this report equal 100 percent.

Key findings

Despite the challenges of 2020, Pros are generally optimistic. They're working harder, but view their organization as more important to members than at the beginning of the year.

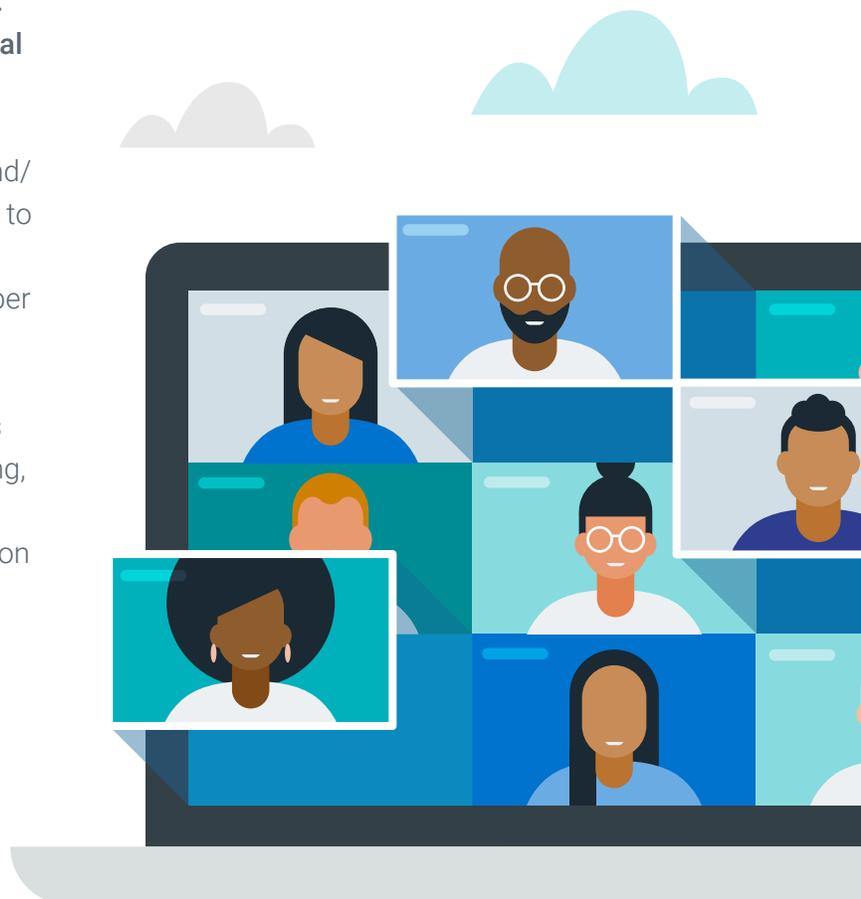
Seventy-six percent of Pros say their organization's staff is working harder than they were last year to meet the growing demands of members. Sixty-two percent see their organization as more important to members today than before the pandemic. More than half (57 percent) say that interaction with members has increased.

Pros are looking to replace lost revenue with new non-dues revenue activities – mostly virtual events. Yet, there is a great deal of uncertainty around virtual events that Pros must navigate.

Seventy-two percent of Pros that are experiencing and/or expect to experience revenue losses say they plan to address those losses by creating new forms of non-dues revenue, primarily through virtual events. Member responses show that there is an increased desire for virtual engagement, but virtual events present some questions to address. Pros' biggest challenges include: creating value for members in a virtual setting, overcoming overuse of virtual platforms (i.e., "Zoom fatigue"), and figuring out how to translate an in-person event to a virtual event.

While Pros are focused on virtual events, they might be missing the boat on other key member priorities, some of which could generate new forms of non-dues revenue.

Because Pros are turning to virtual events to help replace lost revenue, it is perhaps not surprising that when they look to the future, 93 percent say they are focused on providing virtual opportunities to members. However, when paired with survey responses from Members, findings suggest that Pros are under-investing in other key benefits that Members say are their top priorities, which include raising awareness, training, advocacy, and certifications.



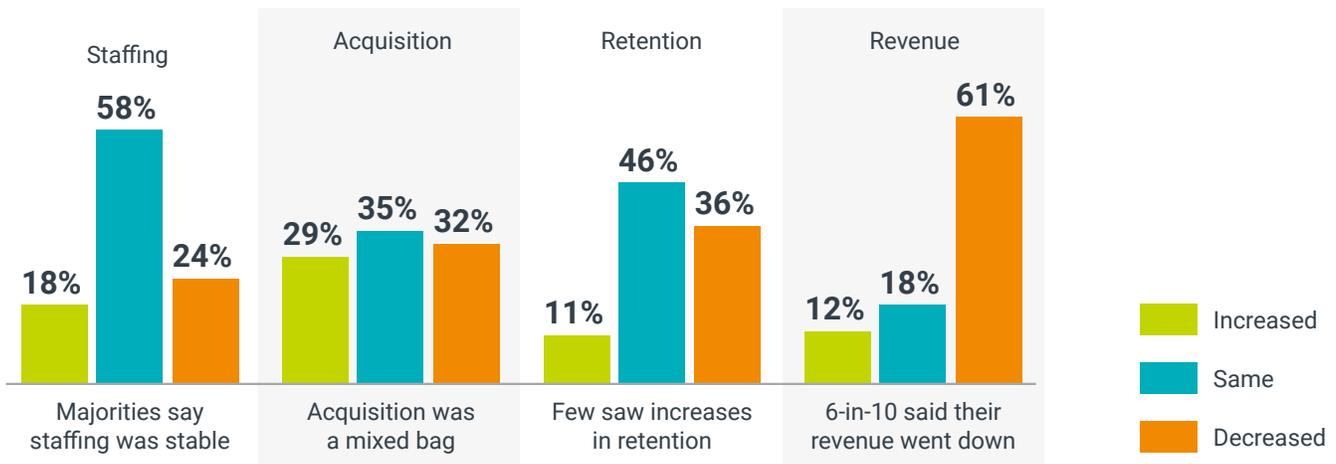
Section 1

Sentiments and outlooks of association professionals

Majorities of Pros say that in the past 12 months, staffing remained stable, but revenue decreased. Few Pros saw increases in retention. Member acquisition was a mixed bag across respondents.

Pros are optimistic about the future, though. Majorities expect staffing levels, member acquisition and retention, and revenue to stay the same or increase.

Pros' sentiments last year



Pros' sentiments next year

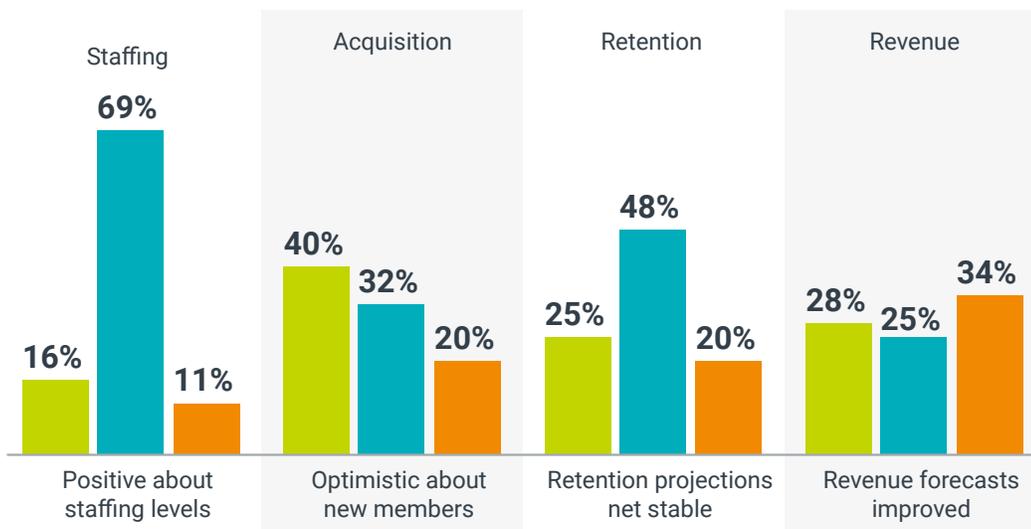


Figure 1. Questions asked: Over the last 12 months, has your organization increased, remained the same, or decreased in terms of... | And in the next 12 months, do you think each of the following will increase, remain the same, or decrease?

Three-fourths of Pros say their organization's staff is working harder than before COVID-19. In addition, most Pros view their organization as more important to members. More than half of Pros also say that interaction with members has increased compared to before COVID-19.

Say their staff is working harder than before COVID-19



Figure 2. Question asked: Generally, do you feel as if your organization's staff is working ...

Perceived importance of organization to members compared to before COVID-19

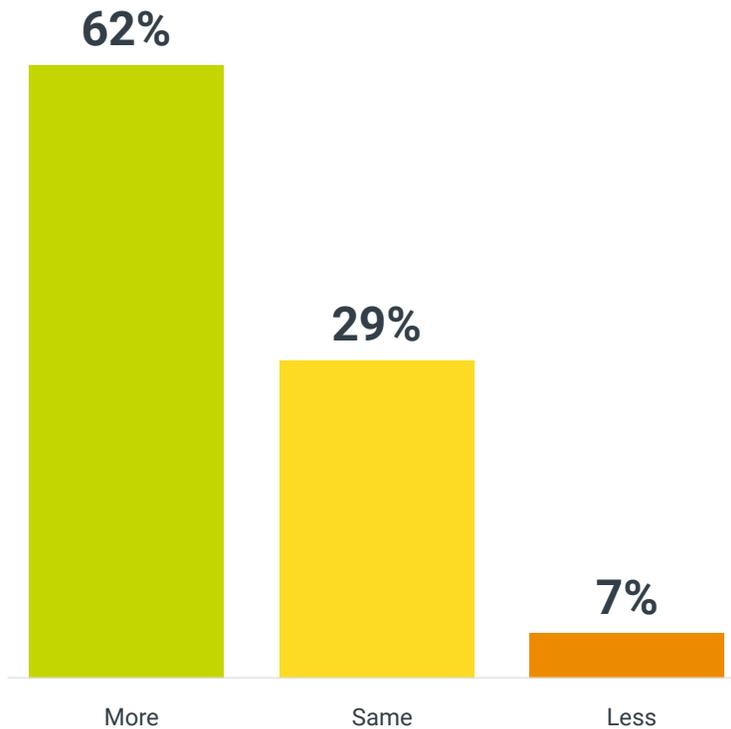


Figure 3. Question asked: How important do you feel your professional membership/trade organization is to members now, compared to before the COVID-19 pandemic?

Member interaction with organization compared to before COVID-19

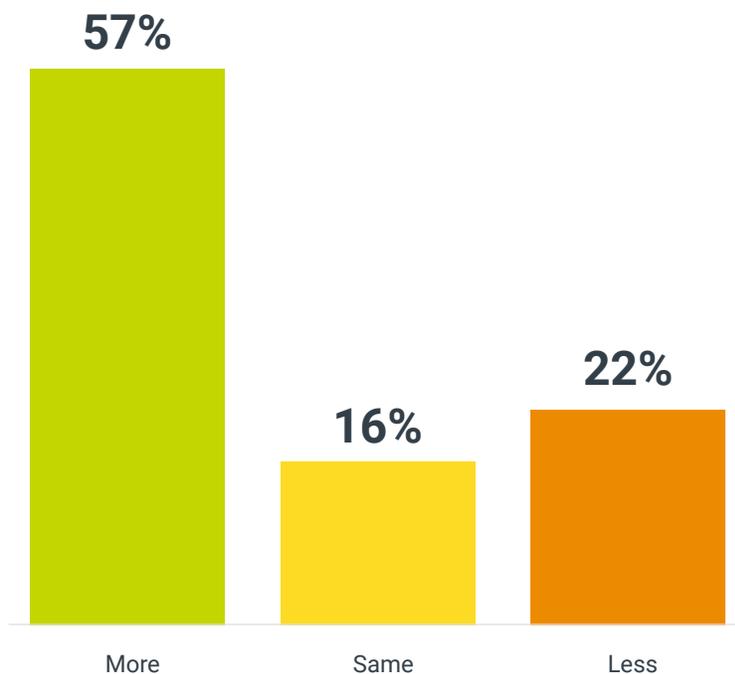


Figure 4. Question asked: How has the COVID-19 pandemic affected member engagement overall (in terms of the number of members engaging and how much they interact)?

Members agree! Half of Members believe their professional membership organization is more important since the pandemic. Forty percent say they are interacting with their organization more than they did before.

— Association Trends 2020: From Disruption to Opportunity by Community Brands



Section 2

Insights into association revenue

Pros from organizations of all sizes say that member dues and meetings/trade shows typically provide the majority of revenue for their organization. With an average of 27 percent of revenue coming from meetings/trade shows, many of which had to be cancelled or transformed to virtual events for 2020 and early 2021, it naturally follows that majorities say that revenue has or will decrease.

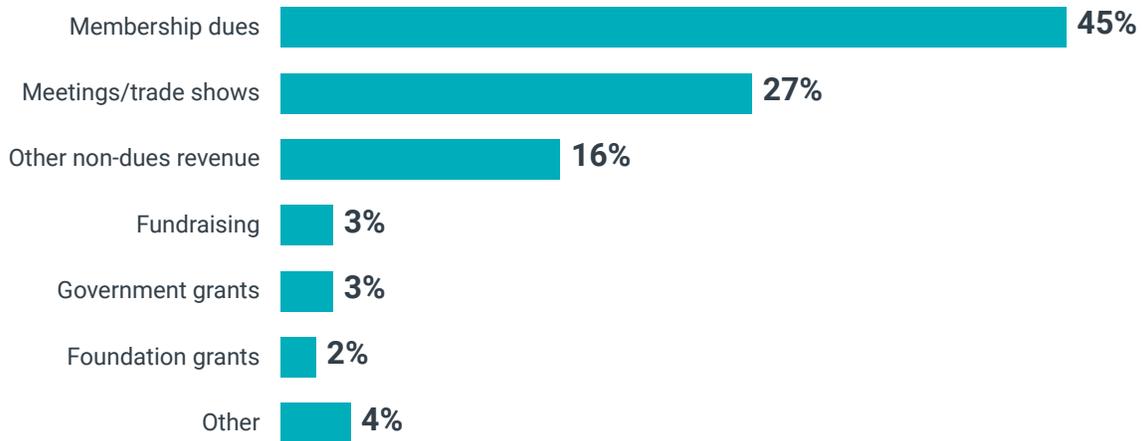


Figure 5. Question asked: In a typical year, what percentage of your organization's revenue is from each of the following? (Your best estimate is fine)

Status of organization revenue

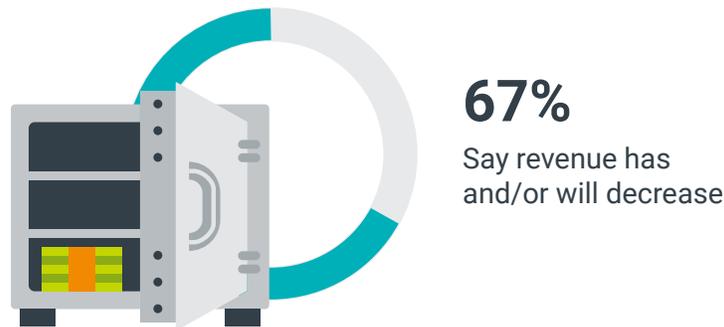


Figure 6. Questions asked: Over the last 12 months, has your organization increased, remained the same, or decreased in terms of... | And in the next 12 months, do you think each of the following will increase, remain the same, or decrease?

To address revenue losses, majorities of Pros say they plan to create new forms of non-dues revenue or reach into reserves. Few say they will put the burden on members through increased membership dues or costs of member benefits and services, or by cutting back on member benefits and services.

How pros plan to address revenue losses

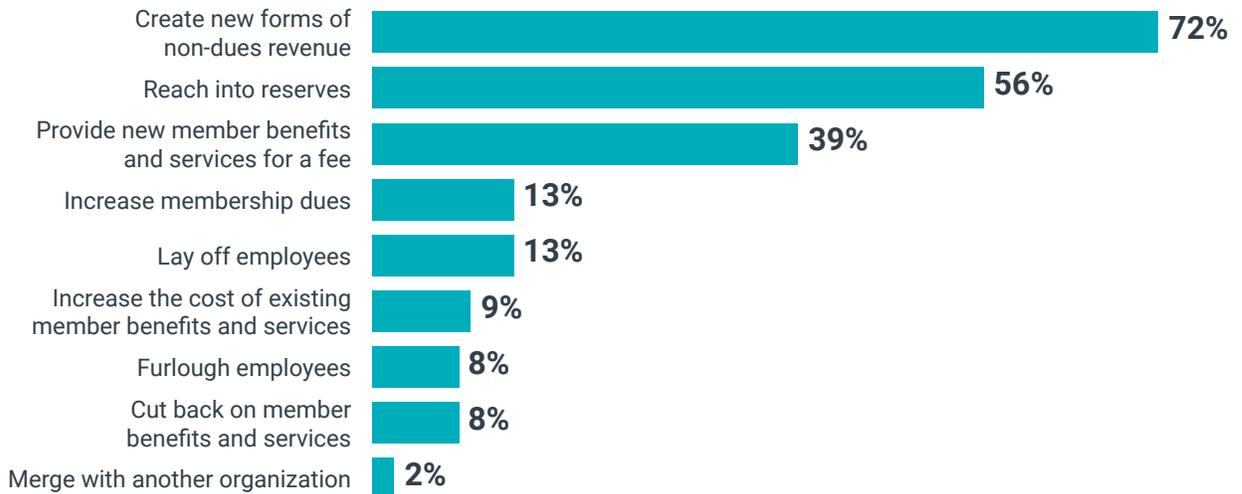


Figure 7. Question asked: In which of the following ways do you plan to address revenue losses? Select all that apply.

A spotlight on virtual events

Most Pros (72 percent) say they are relying more on virtual events to generate non-dues revenue compared to pre-pandemic times – more than any other source tested. Eighty-five percent say they will invest more in virtual meetings and conferences over the next 12 months.

Interestingly, 87 percent of those who held virtual events said they were successful, though the definition of success is unclear, as 39 percent did not set an official goal. These findings suggest that associations are seeing engagement but have an opportunity to increase revenue-driving activities related to their virtual events as this newer form of engagement evolves.



Pros' investment in virtual events



Pros' success with virtual events



Figure 8. Questions 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... | How important are each of the following for your organization over the next year? | Please indicate how much you agree with the following statements about virtual events, courses, and conferences offered by your professional membership/trade organizations. | Here are some specific ways that professional membership/trade organizations might use technology to build community and share information during the COVID-19 pandemic. You indicated that your organization held a virtual event during the COVID-19 pandemic. How successful was the event? | How, if at all, did the virtual event meet its revenue goals? | Please explain your answer above.

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 mid to late career 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.

— Association Trends 2020: From Disruption to Opportunity by Community Brands



Survey responses suggest that Pros face multiple challenges associated with virtual events, perhaps due to the fast, unexpected shift from in-person to virtual events. This situation might also explain why more Pros do not report meeting or exceeding their virtual event revenue goals – which could turn around as Pros become more familiar with running online events. At the top of the list of challenges are creating value for members in a virtual setting, overcoming overuse of virtual platforms, and figuring out how to translate in-person events to virtual settings.

Very or somewhat challenging when planning or executing a virtual event



Figure 9. Question asked: How challenging do you think each of the following is when planning and executing a virtual event?



Section 3

Association priorities

Because Pros are looking to virtual events to help replace lost revenue, it is perhaps not surprising that when they look to the future, they are focused on developing or improving virtual opportunities, as well as increasing membership acquisition and retention.

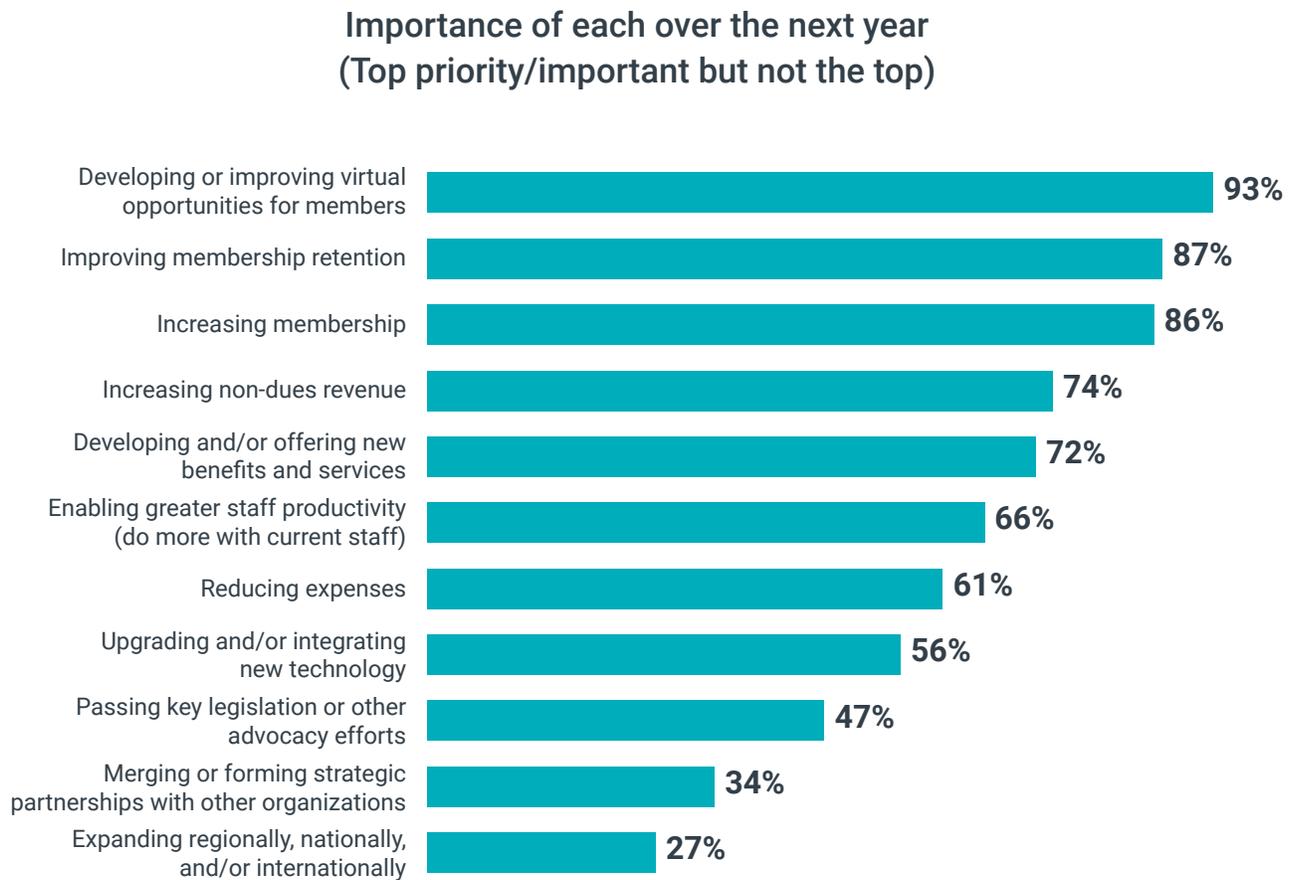


Figure 10. Question asked: How important are each of the following for your organization over the next year?

Also not too surprising: Pros are using more tools than they were before. More interesting is what tools they're using. Compared to last year, more Pros are using tools including association management software (AMS), customer relationship management (CRM) systems, and email marketing platforms.

Consistent with their focus on developing virtual opportunities, significantly more Pros are using webcast/webinar tools and online communities. Almost two-thirds are using virtual event platforms.

Technology/Solutions Used

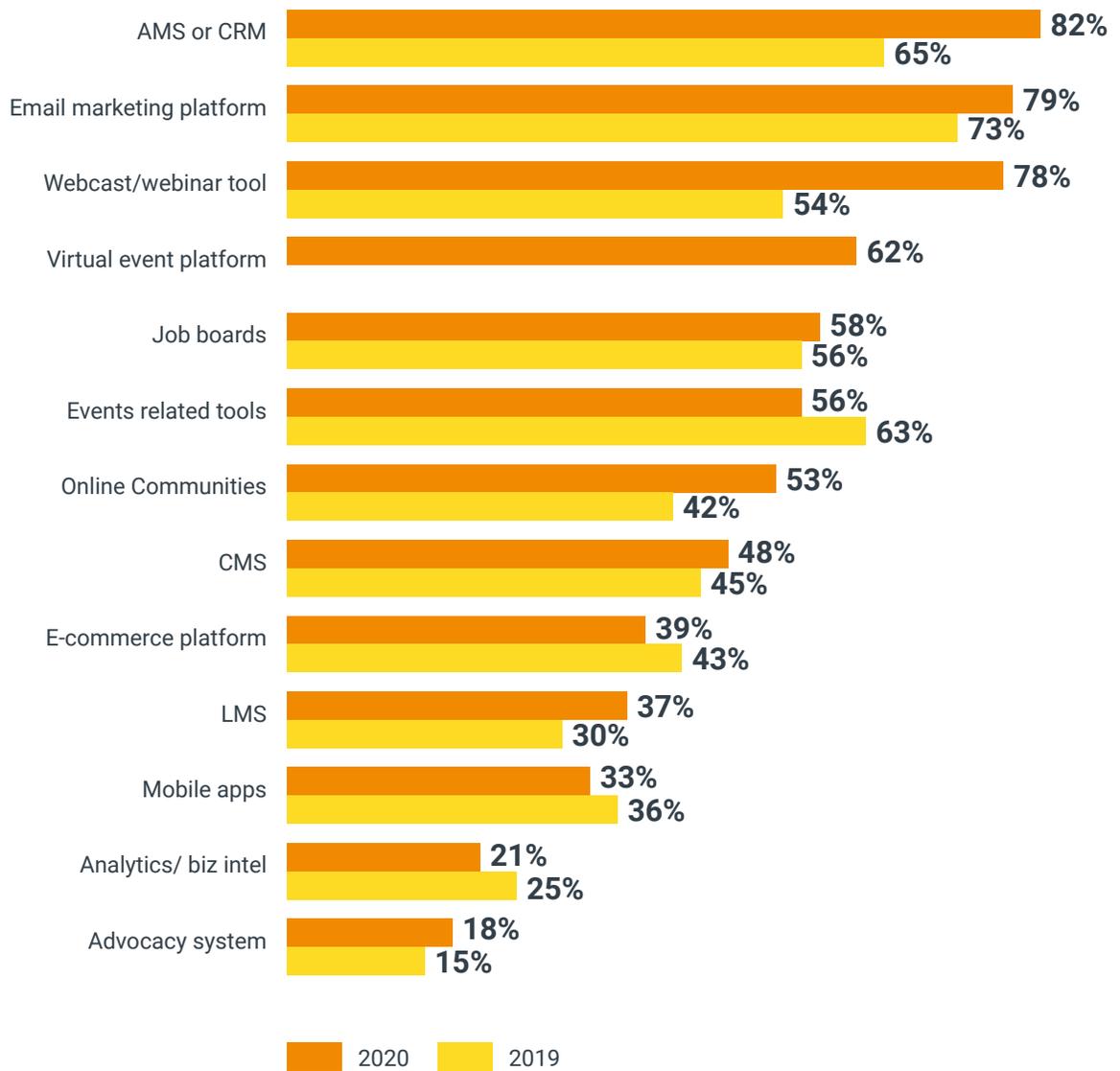


Figure 11. Question asked: Which of the following technology/solutions does your organization use? Select all that apply. | NOTE: Virtual event platform not tested in 2019.

When paired with survey responses from Members, findings suggest that Pros might be missing out on developing other benefits that Members say are their top priorities, which include raising awareness, training, advocacy, and certifications.

% of pros who will invest more since covid-19



*Among Members' top priorities

Figure 12. 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...

Benefits including training and certifications are important and/or increasing in importance to Members. Interestingly, much of the programming at meetings/conferences include these activities, yet meetings/conferences rank lower in the list of relative importance to members. This paradox suggests that, especially as in-person meetings/conferences become feasible again, it might be time for associations to rethink their approach at in-person events as well as deliver more of the benefits members seek throughout the year through other channels.



Section 4

Where do you go from here?

Here are four ways to make the data from this study practical for your organization right away:

1

Drive more value and revenue from virtual events

In the face of a fast, unplanned move from in-person to virtual events, Pros are tackling multiple challenges associated with virtual events, including creating value for members in a virtual setting, overcoming overuse of virtual platforms, and figuring out how to translate in-person events to virtual events. Reverse this trend by becoming more familiar with tools, services, and best practices for creating great online events and selling sponsorships to drive more revenue from those events. For more information, explore [Community Brands event management solutions](#).

2

Think beyond big events for virtual engagement opportunities.

Pros and Members both see virtual events as a substitute when in-person events are not feasible, and see them sticking around. But, virtual engagement can reach so much further. In fact, a majority of Members have been engaging virtually and expect to continue. Members who have become more involved in the past year 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, evaluate your programs and benefits and determine what new virtual offerings you might provide – such as an online member community for networking, an **online career center** for career advancement opportunities and more, smaller trainings and certifications outside larger event venues.

3

Hold on to your dues revenue while investing in other sources of non-dues revenue.

While you might have missed out on revenue due to cancelled in-person events in 2020, hosting virtual events isn't the only other way to drive revenue. Delivering more of the benefits members seek – including training and certification, can open doors to new non-dues revenue opportunities while providing greater member value. Also, consider creating sponsorship opportunities for everything from job postings on your career center to sponsor ads and exhibit booths for virtual events to boost revenue. Meanwhile, with 45 percent of revenue coming from membership dues, look for ways to retain the dues you have coming in – such as providing an auto-renewal option and offering installment payment options. For more tips and insights, read the paper, [The Association's Guide to Retaining and Diversifying Revenue in Challenging Times](#).

4

Let technology do some of the heavy lifting. Pros say they're working harder than last year and Members are engaging more. Take advantage of modern technology to work more efficiently and drive greater revenue so you have added time and resources to deliver the value members seek. Learn about the association industry's most powerful, integrated suite of software and services for associations and other member-based organizations, which includes solutions for association management, learning management, career centers, and events: [Community Brands solutions for associations](#).

Learn more insights from the 2020 Association Trends: From Disruption to Opportunity



This report will help guide your association's strategies and give you actionable takeaways to increase engagement and loyalty.

[Download the guide](#)

Survey methodology

Commissioned by Community Brands, Edge Research conducted an online survey of 370 professionals who work in professional membership organizations. Survey respondents were recruited using Community Brands lists, which is a non-probability sample. The terms "Professionals" or "Pros" refers specifically to those who were surveyed. A parallel survey was conducted among 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. 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, nonprofits, K-12 schools, and faith-based groups. Specifically, for associations, Community Brands offers solutions for membership management, learning management, career centers, and event and camp management. Industry-leading products include YourMembership, Nimble AMS, NetForum, Aptify, Crowd Wisdom, Freestone, YM Careers, GiveSmart, MIP Fund Accounting, and Expo Logic. Through innovation and technology, the company empowers more than 100,000 clients and partners of all sizes to create greater member engagement, grow revenue, and improve staff efficiency. To learn more, visit www.communitybrands.com or follow us on Twitter or LinkedIn.



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