Association Communications Benchmarking Report

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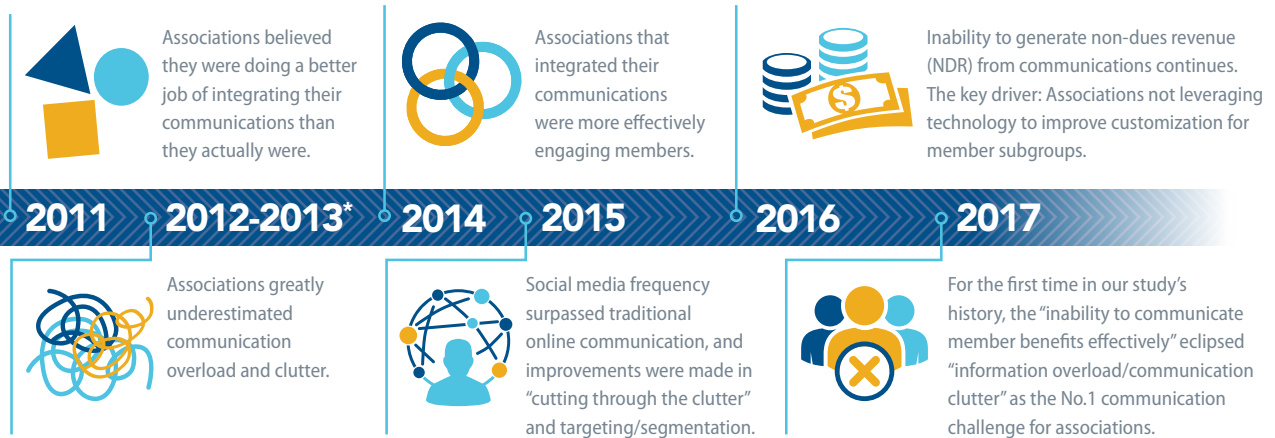A NAYLOR PUBLICATION

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ASSOCIATION COMMUNICATIONS BENCHMARKING STUDY 2018

Naylor Association Solutions has been a leader in helping trade associations and professional societies across North America get the most out of their member communication programs for nearly 50 years. As part of our commitment to the take AIM—assess, integrate and measure—approach to member communications, Naylor has partnered since 2011 with more than a dozen of the state allied societies of association executives to conduct one of the most comprehensive annual studies that focuses exclusively on the communication strategies and best practices of membership organizations.

More than 2,500 senior leaders of North American trade associations, professional societies and association management companies have completed our online surveys over the last seven years. Respondents representing a mix of small, midsize and large organizations across a variety of industries have a wide range of communication challenges but one thing in common: While they have more tools available to communicate, their members (and prospective members) have never been harder to reach, harder to impress or more likely to question the value of their membership.

Year-over-year findings highlight associations' progress, as well as their continued challenges.

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

Associations that integrated their communications were more effectively engaging members.

Inability to generate non-dues revenue (NDR) from communications continues. The key driver: Associations not leveraging technology to improve customization for member subgroups.

2011   **2012-2013***   **2014**   **2015**   **2016**   **2017**

Associations greatly underestimated communication overload and clutter.

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

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

2018

- Frequency of member communication stabilized for the first time in our study's seven-year history and staffing challenges somewhat abated, but "information overload/communication clutter" resurfaced as the No.1 communication challenge faced by associations.
- Legacy communication channels (live events, print magazine and member newsletter) remained atop the communication value chain.
- Integrating communication across platforms, customizing for different member subgroups, generating non-dues revenue and having a social media strategy remained red flags for our 2018 respondents.
- Podcasts, apps, webinars and private online communities showed double-digit increases in both perceived value and adoption.

Source: Association Adviser Communications Benchmarking Survey
* The 2012-2013 benchmarking study was based on a single survey that started in late 2012 and finished in early 2013.

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REPORT HIGHLIGHTS

This report reflects survey results through May 7, 2018. The survey remains open all year for individuals who would like to participate. Adding to the data set is not only good for enhancing the industry's body of knowledge, but it also allows you to compare the communication practices of your organization to the practices of peer groups. Participants also are able to compare themselves against a set of communication best practices by taking the survey and then downloading their unique best practices report card. For a comprehensive look at all of this year's results and to get your best practices report card, **log in at communicationsbenchmark.naylor.com**.

Associations are communicating with members as frequently as ever, using more tools than ever, but not more effectively.
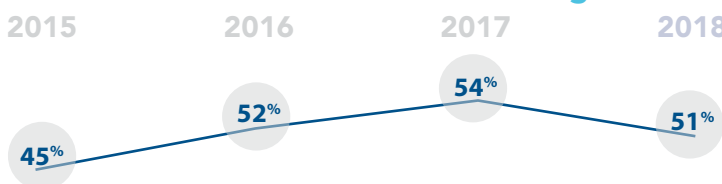
Associations' communication *frequency* appears to have stabilized for the first time since we began our survey in 2011. However, communication *efficiency* still has plenty of room for improvement. On average, associations communicate with members an estimated 31 times per month (via print, online, social media and video); that's about the same frequency they communicated with members in 2017 and just a slight increase over 2016 and 2015. However, the frequency with which they use various channels has changed. In a reversal of 2017 findings, print, video and digital now are being used less frequently than they were a year ago. Social media continues to be used even more frequently.

Despite the high *frequency* of member communication touches overall, many associations say they struggle to relay their membership value proposition. Not surprisingly, associations report that their communication teams feel understaffed.

Monthly Communication Frequency by Channel

	2015	2016	2017	2018	
	26.5X	29.9X	31.2X	30.7X	
			15.6	16.3	Social Media
		15.1	11.7	11.1	Digital Online
	12.9	11.6			
	9.6				
	2.1		2.2	1.7	Print
	1.9	1.8	1.7	1.6	Video
		1.4			
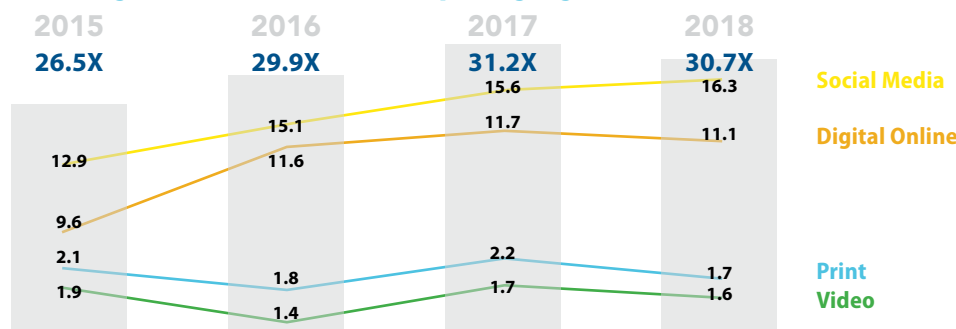
Percent of Communication Teams Feeling Understaffed

2015	2016	2017	2018
45%	52%	54%	51%

Source: Association Adviser Communications Benchmarking Survey

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The majority of associations still struggle to become more efficient and more effective communicators.

"Information overload/communication clutter" resurfaced as the most frequently cited communication challenge in 2018, followed by **"inability to communicate member benefits effectively."** These two long-standing challenges were each cited by two-thirds of respondents in 2018. Once again, roughly half of respondents said they were challenged when it came to **"engaging young professionals"** and **"customizing for member segments."** Further, the **"inability to produce consistent video"** (44% agreed) remained among the Top 5 communication challenges in 2018.

Top 5 Communication Challenges % respondents agreeing	2011 (first year)	2016	2017 (last year)	2018 (this year)
Combating information overload/cutting through the clutter	54%	69%	66%	68%
Communicating member benefits effectively	32%	67%	68%	62%
Customizing for member segments	23%	55%	52%	57%
Engaging young professionals	n/a	55%	54%	48%
Producing video consistently	n/a	42%	45%	44%

Additional Communication Challenges % respondents agreeing	2011 (first year)	2016	2017 (last year)	2018 (this year)
Overcoming technical barriers (e.g. spam filters, etc.)	n/a	45%	41%	43%
Helping members find desired info quickly	n/a	33%	39%	41%
Facilitating member-to-member communication	n/a	43%	40%	36%
Maintaining position as industry's No. 1 info source	28%	42%	35%	35%
Communicating legislative, regulatory and technical updates	13%	23%	30%	26%
Providing mobile-friendly communications	n/a	34%	28%	26%
Keeping members informed about new events and continuing education	14%	21%	30%	25%

Source: Association Adviser Communications Benchmarking Survey

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Noteworthy Numbers

ADVERTISING, SPONSORSHIP & MEASUREMENT

Nearly half (46%) felt their inability to generate non-dues revenue (NDR) from their communications was a serious or significant challenge

Up 6% from 2017

Nearly half (49%) thought their inability to measure their communications' effectiveness was a serious or significant problem (at least 4 on a scale of 5)

Even more problematic from 40% that said so in 2017

7 out of 10 had at least some type of process for measuring member engagement

Only 1 in 5 felt they have a good understanding of their reader, member and advertiser needs

STRATEGY

40% indicated they conduct member communication surveys every 12-24 months

Only 1 in 4 have a department-specific or platform-specific content strategy. Nearly half (47%) rely on a one-size-fits-all content strategy

2 out of 3 outsource some aspect of their communication program

1 out of 2 feel their communication teams are understaffed

27% gave themselves a rating of at least 4 out of 5 when asked how well their communications channels were integrated

Nearly 2 out of 5 said they need to improve their ability to measure integration across all platforms

Nearly 3 out of 5 customize for new members

Only 1 in 3 believe they are effectively leveraging their member database/ AMS to deliver a customized member experience

More than half customize for young professionals

4 out of 5 do not customize for mid-career or long-standing members

Only 20% feel they are effectively leveraging their career center, content management system, learning management system or marketing automation system to deliver a customized member experience

Less than 1 in 3 felt they were communicating too often with members

Only 18% felt that "creating relevant content" was a challenge or significant challenge

3 out of 5 felt they could improve their member engagement with their communications by improving their ability to customize for different subgroups

3 out of 5 said they need to better understand member needs, demographics and goals.

## EFFECTIVENESS

CUSTOMIZATION

Source: Association Adviser Communications Benchmarking Survey

46% recognize a serious or significant problem with the **lack of revenue generated** from their communication vehicles, up 6% from 2017

Only **1 in 3** strongly agree that social media is a high priority, and only **1 in 5** strongly agree that their social media strategy is well-defined
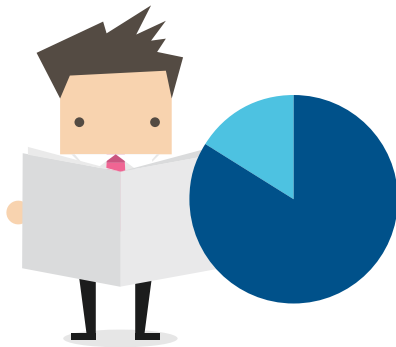
A strong majority (84%) believe they generally create relevant content, and 40% are conducting communication-specific surveys at least once every 12–24 months to stay on top of members' needs, **yet only 1 in 5 (20%) believe they have a good understanding of their reader, member and advertiser needs**

Nearly half recognize they need help identifying the ideal member communication frequency

Although 3 in 5 (58%) believe they could improve member engagement by improving their ability to customize for different subgroups, **not many are actually doing it** *(see bottom of Page 11 for customization results)*

As discussed later in this report, roughly **2 in 5 respondents (41%) felt they could be doing a better job of promoting their communications** as a member benefit, and 2 out of 3 said members tell them they are "too busy" to engage with their communications

Source: Association Adviser Communications Benchmarking Survey

Staffing challenges continue.

As can be expected in these "do more with less" times, half of respondents (51%) felt their organizations were understaffed overall and even more so within their communication departments—51% felt their publishing/content creation teams were understaffed, and 49% felt their social media teams were understaffed. Since 2017, staffing challenges improved slightly for publishing/content teams but got more severe for social media teams.

On a positive note...

- **Five areas** in which associations seem to be improving:
  1. Communicating member benefits effectively
  2. Engaging young professionals
  3. Facilitating member-to-member communication
  4. Communicating legislative, regulatory and technical updates
  5. Keeping members informed about events and continuing education

- Legacy communication channels (live events, print magazines, email newsletters and webinars) continue to be among the most highly rated member communication channels, with **live events remaining especially high for member engagement and for obtaining meaningful member feedback**.

- Both **printed and digital versions of the member magazine** showed a resurgence in perceived value among survey respondents, as did print newsletters and private online communities.

More than half said if they got an unexpected 50% budget increase in their communication departments, they would invest in hiring more staff and improving the quality of existing communication vehicles.

Noteworthy: While staffing challenges improved slightly for publishing/content creation teams in 2018, they got more severe for social media teams over the same time period.

Top 10 Individual Communication Channels

CHANNEL	Consider very/extremely valuable	Average rating (5.0 max)	Rank 2016	Rank 2017	Rank 2018	Year-over-year change
Traditional conferences/events	90%	4.61	1	1	1	-
Member magazine (print)	74%	4.13	3	2	2	-
Member enewsletter	69%	3.92	2	3	3	-
Webinars	66%	3.87	4	4	4	-
Leadership development events	62%	3.78	NA	5	5	-
Young professional events	60%	3.59	NA	8	6	▲2
Newsletter (print)	57%	3.54	15	17	7	▲10
Facebook	56%	3.62	5	6	8t	▼2
Show guide (print)	56%	3.53	10t	11	8t	▲3
Member eZine	55%	3.59	9	10	10t	-
Private online community	55%	3.61	NA	12	10t	▲2

Source: Association Adviser Communications Benchmarking Survey
Calculations vary based on total responses per channel.

New to Top 10 in 2018
- **Member newsletter (print)**
- **Private online communities**
- **Show guide**

COMMUNICATION PLANNING

*The earmark of a successful association communication program is one that has a staff willing to take the time to develop a comprehensive plan. The following section reviews a few takeaways from the communication planning section of this year's study. For a comprehensive look at results of all data, log in at **communicationsbenchmark.naylor.com**.*

Communication Strategy Takeaways
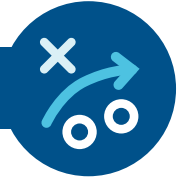
Nearly half of respondents (47%) say they have a single strategy for communicating with all members.

Communication Strategies for Member Engagement

47% have a single strategy for communicating with all members

28% have a platform-specific strategy

26% have a department-specific strategy

Total exceeds 100% due to rounding.

Print remains viable even in this digital age. 1 in 4 associations still communicate with members multiple times per month via print.

Monthly Print Communication Frequency

16% 2-3 times

68% 1 time or less

7% 4-10 times

2% Don't know

3% 11 times or more
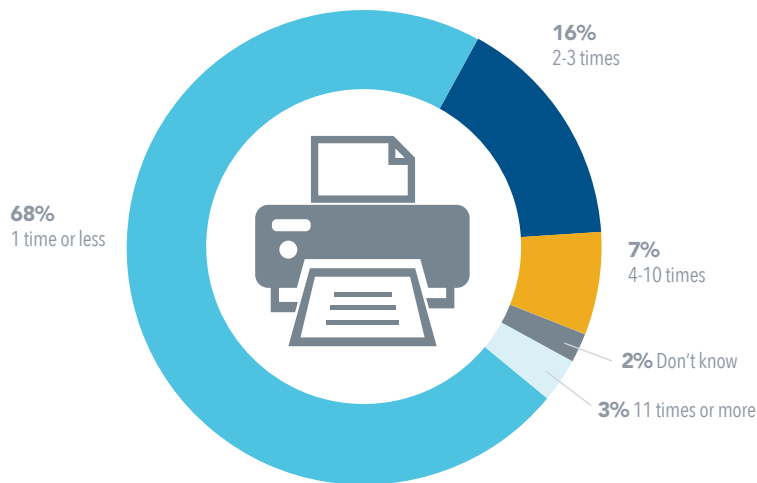
Source: Association Adviser Communications Benchmarking Survey

For the second straight year, the print version of the member magazine has been the second-most highly valued member communication channel, up from No. 4 in 2016.

In 2018, the print version of the member newsletter also broke into the top 10.

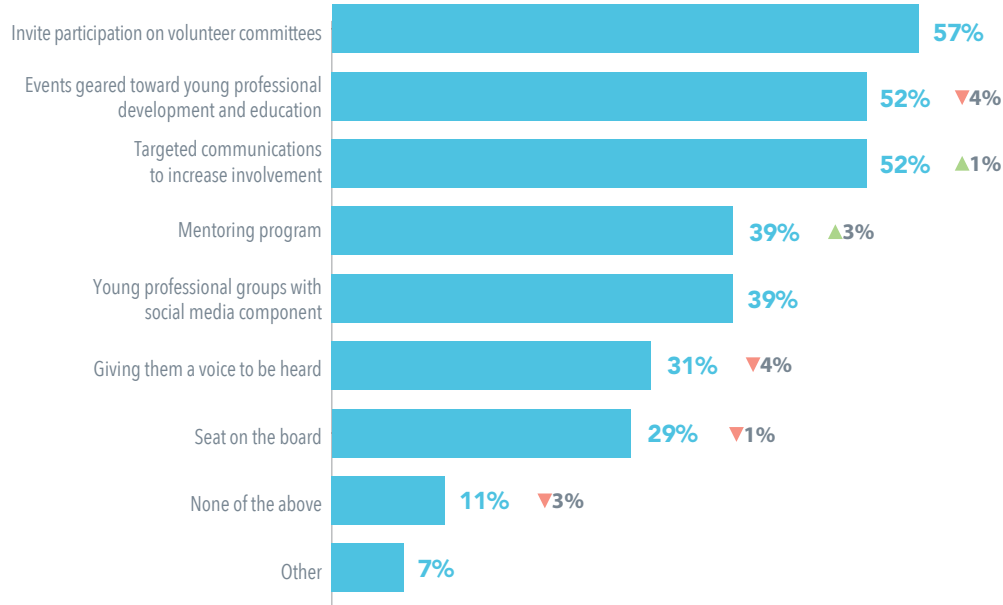## When engaging next-generation members, the most widely used tactics are not necessarily social/mobile:

- Inviting them to participate on volunteer committees (57%)
- Creating communications targeted to younger members (55%)   ▲4%
- Gearing events toward young professional development and education (52%)   ▼4%

Association Approach to Next-Generation Member Engagement

Category	Value	Change
Invite participation on volunteer committees	57%	
Events geared toward young professional development and education	52%	▼4%
Targeted communications to increase involvement	52%	▲1%
Mentoring program	39%	▲3%
Young professional groups with social media component	39%	
Giving them a voice to be heard	31%	▼4%
Seat on the board	29%	▼1%
None of the above	11%	▼3%
Other	7%	

What would association professionals do with an unexpected 50% increase in their communication budget?

Staff reports they would focus on improving the quality of existing vehicles including social media and video (and on staffing accordingly). Mobile has become less of a priority.

	2015	2016	2017	2018	Year-over-year change
Improve quality of existing communication vehicles	53%	54%	52%	54%	▲2%
Hire more staff	46%	53%	51%	53%	▲2%
Provide more robust video	n/a	n/a	42%	45%	▲3%
Upgrade publishing tools, technologies or processes	47%	54%	43%	42%	▼1%
Put more muscle behind social media	32%	31%	41%	42%	▲1%
Improve mobile strategy	39%	48%	39%	31%	▼8%
Launch new communication vehicles	27%	26%	29%	29%	N/A

Source: Association Adviser Communications Benchmarking Survey
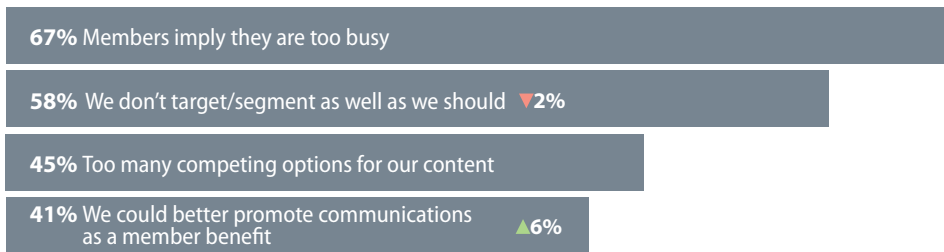
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Communication Effectiveness Takeaways

As has been the case for 6 out of the past 7 years, information overload/clutter was the No. 1 communication challenge.
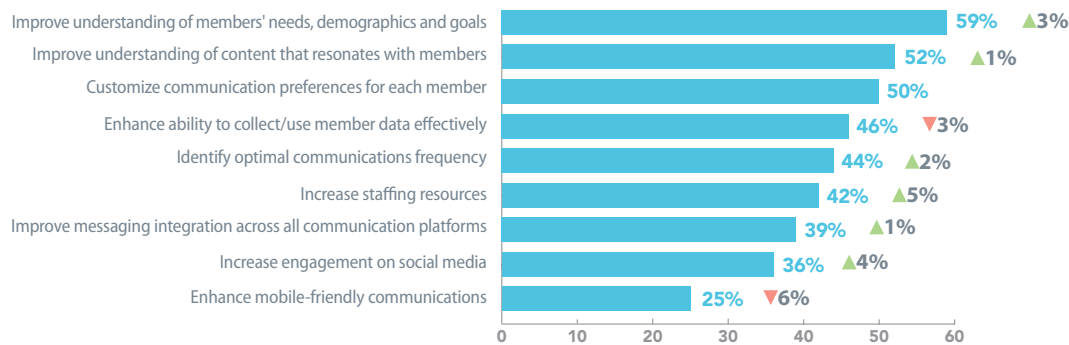
Top 5 Communication Challenges *% respondents agreeing*	2011 (first year)	2017 (last year)	2018 (this year)	Year-over-year change
Combating information overload/cutting through the clutter	54%	66%	68%	Worse
Communicating member benefits effectively	32%	68%	62%	Better
Customizing for member segments	23%	52%	57%	Worse
Engaging young professionals	n/a	54%	48%	Better
Producing video consistently	n/a	45%	44%	Better

Top Reasons for Declining Reader Engagement

67% Members imply they are too busy

58% We don't target/segment as well as we should ▼2%

45% Too many competing options for our content

41% We could better promote communications as a member benefit ▲6%

Historically, 4 in 5 associations have told us that at least half of their communications are ignored. In 2018, we attempted to understand why.

Majority of resources/strategies needed to increase member engagement center around understanding their needs, goals, demographics and preferences.

Improve understanding of members' needs, demographics and goals	59% ▲3%
Improve understanding of content that resonates with members	52% ▲1%
Customize communication preferences for each member	50%
Enhance ability to collect/use member data effectively	46% ▼3%
Identify optimal communications frequency	44% ▲2%
Increase staffing resources	42% ▲5%
Improve messaging integration across all communication platforms	39% ▲1%
Increase engagement on social media	36% ▲4%
Enhance mobile-friendly communications	25% ▼6%

0   10   20   30   40   50   60

About 1 in 2 respondents felt they could improve member engagement with their communications by:
• improving their understanding of members needs, demographics and goals
• better understanding what makes content relevant to members
• improving their ability to customize communication for each member
• enhancing their ability to collect and use member data more effectively

Source: Association Adviser Communications Benchmarking Survey

Communication Customization Takeaways

Most Important Topic to Members

As has been the case in recent years, career-related topics, industry news, and lobbying/advocacy continue to gain prominence among the most important topics to members.

Topic	Rank 2017	Rank 2018
Network with industry peers	1	1
Industry news/trends	4	2▲
Career/professional development	2	3▼
How to/best practice	3	4▼
Lobbying/advocacy	5	5
Technology	8	6▲
Information about products/resources	6	7▼
Coverage of key industry events	9	8
Member news	10	9▲
Programs for young professionals	7	10▼
Industry job openings	11	11
Data/stats for improving job performance	13	12
Succession planning	12	13

BIGGEST GAINERS

#1 Networking with Industry Peers

#2 Career/ Professional Development

How-to/Best Practices

FELL FROM #1 TO #3

Best Ways to Gauge Member Needs

7 out of 8
(▲1% from 2017)
face-to-face interaction at live events or their annual meeting

3 out of 4
(▲6% from 2017)
member satisfaction surveys or member service calls/emails

2 out of 5
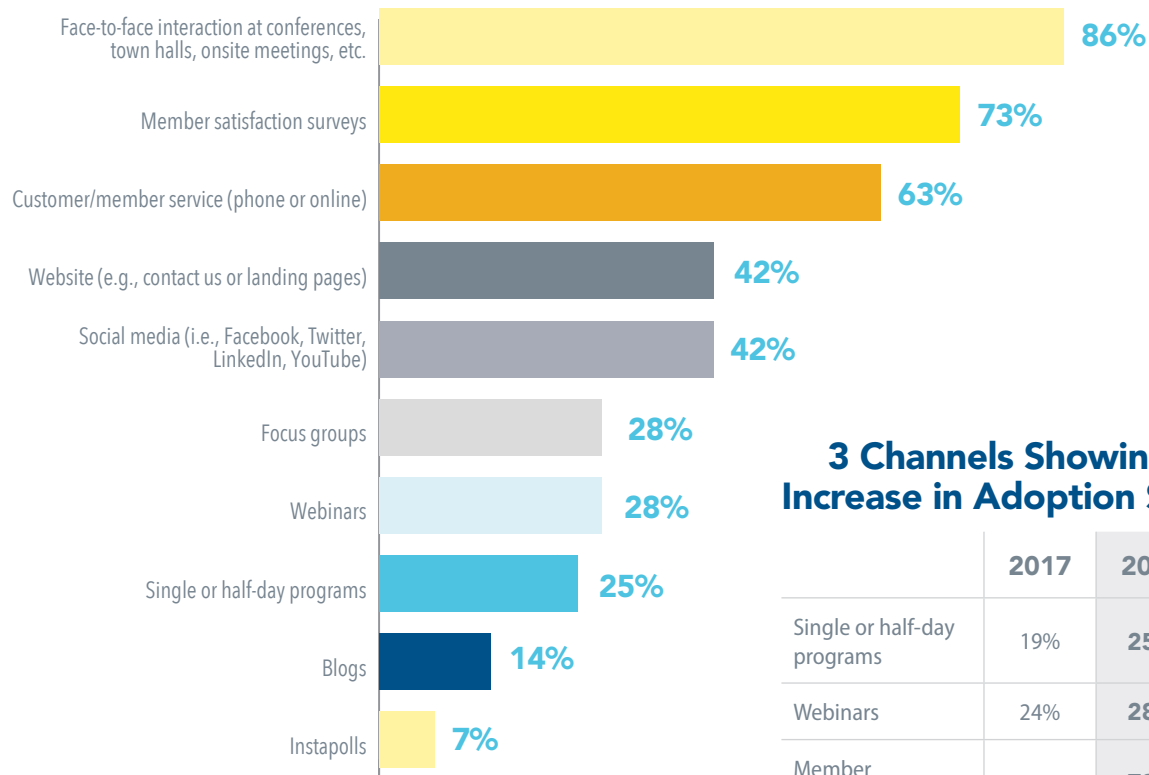(unchanged since 2016)
social media or association website

2 out of 3
(▲2% from 2017)
customer/member services

Source: Association Adviser Communications Benchmarking Survey

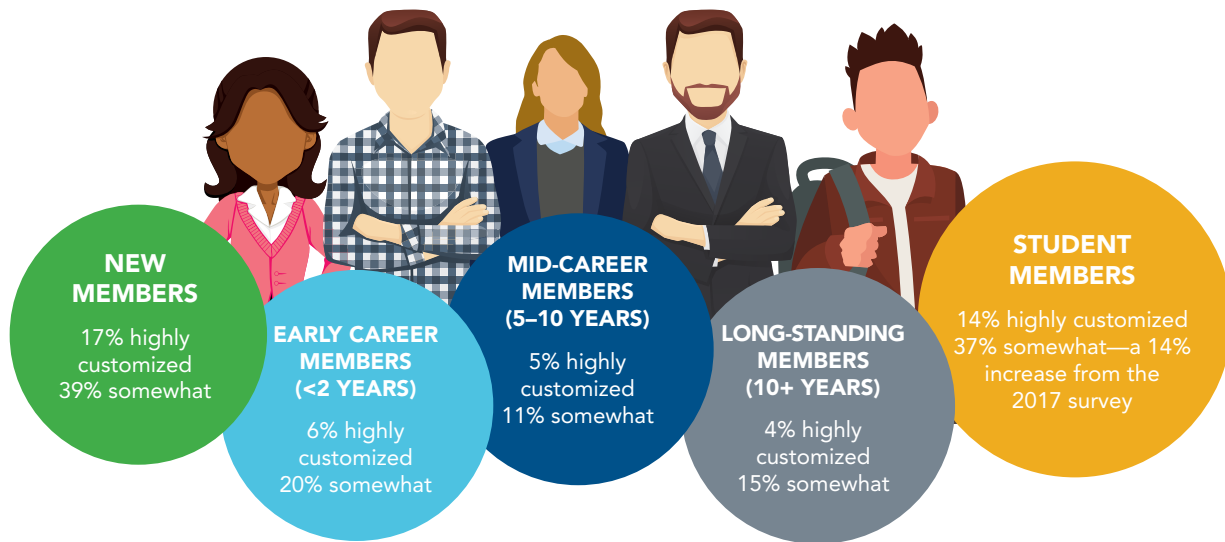## Associations use a variety of vehicles and tools to determine member needs.

Tool	Percentage
Face-to-face interaction at conferences, town halls, onsite meetings, etc.	86%
Member satisfaction surveys	73%
Customer/member service (phone or online)	63%
Website (e.g., contact us or landing pages)	42%
Social media (i.e., Facebook, Twitter, LinkedIn, YouTube)	42%
Focus groups	28%
Webinars	28%
Single or half-day programs	25%
Blogs	14%
Instapolls	7%

Note: Total exceeds 100% due to multiple response options.

3 Channels Showing Greatest Increase in Adoption Since 2017

	2017	2018	% Change
Single or half-day programs	19%	25%	▲6%
Webinars	24%	28%	▲4%
Member satisfaction surveys	69%	73%	▲4%

Associations still need to work on customizing communications for important member subgroups, although there has been significant improvement in reaching student members since 2017.

NEW MEMBERS
17% highly customized
39% somewhat

EARLY CAREER MEMBERS (<2 YEARS)
6% highly customized
20% somewhat

MID-CAREER MEMBERS (5–10 YEARS)
5% highly customized
11% somewhat

LONG-STANDING MEMBERS (10+ YEARS)
4% highly customized
15% somewhat

STUDENT MEMBERS
14% highly customized
37% somewhat—a 14% increase from the 2017 survey

Source: Association Adviser Communications Benchmarking Survey

While technology is not being fully leveraged to deliver a customized experience, there appears to have been improvement since 2017.

Percentage of respondents who say the following technologies are "very/highly" effective for delivering a customized member communication experience.

Email Marketing System	**42%**	▼1%
Member Database/AMS	**33%**	▲2%
Marketing Automation System	**18%**	▲5%
Career Center	**17%**	-
Content Management System (CMS)	**17%**	▼14%
Learning Management System (LMS)	**15%**	▼2%

Advertising, Sponsorship and Measurement Takeaways

47% Offer some customization (mostly for best partners)

43% Survey their advertisers/sponsors annually

16% Fully customize for each sponsor

Again, a promising number of associations hit the "sweet spot" for member communication surveys.

48%

Survey their members at least every 12–24 months in an effort to improve their communications.

Why aren't advertisers and sponsors being surveyed at least annually?

29% said they don't have the resources to provide metrics or address issues that may be raised

15% said "no news is good news" or they don't feel they have a close enough relationship to ask

Source: Association Adviser Communications Benchmarking Survey

Associations typically are not using enough data points for measuring engagement.

3 in 4

have at least some type of process for measuring member engagement.

For those who try to measure, a select number of factors are generally used in their calculation. The following engagement factors (out of more than a dozen) were cited by at least **2 in 5 respondents:**
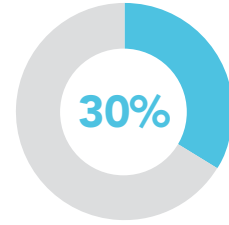
Attendance at events (65%)

Email metrics (45%)

Committee participation (43%)

30%

of respondents said their organizations had *NO PROCESS* for measuring engagement

Engagement factors cited by at least 1 in 4 of respondents:

Years of membership (37%)

Interacting with our social media channels (28%)

Number of visits to our website (26%)

Source: Association Adviser Communications Benchmarking Survey

COMMUNICATION VEHICLES

Top 5 Individual Communication Channels

CHANNEL	% Consider Very/ Extremely Valuable	Average Rating 5.0 Max
Traditional conferences/events	90%	4.61
Member magazine (print)	74%	4.13
Member enewsletter	69%	3.92
Webinars	66%	3.87
Leadership development events	62%	3.78

Calculations vary based on total responses per channel.

Live events remain at the top, while young professional events, appointment-setting events and virtual events make gains.

Perceived Value of Various Event Types

CHANNEL	% Consider Very/Extremely Valuable
Traditional conferences/events	90%
Young professional events	60%
Appointment-setting events	50%
Virtual events	39%

Portfolio of useful communications continues to expand.

Perceived Value as Very/Extremely Valuable

CHANNEL	% Consider Very/ Extremely Valuable	Year-over-year change
Private online communities	55%	▲11%
Apps	47%	▲10%
Podcasts	40%	▲27%
Blogs	36%	▲8%
Instagram	26%	▲8%
Text messaging	25%	▲7%
Snapchat	6%	-

Source: Association Adviser Communications Benchmarking Survey

Most effective vehicles used for driving traffic to association website

86% Email

84% Social Media

57% Education offerings

41% Free resources

40% Job Board
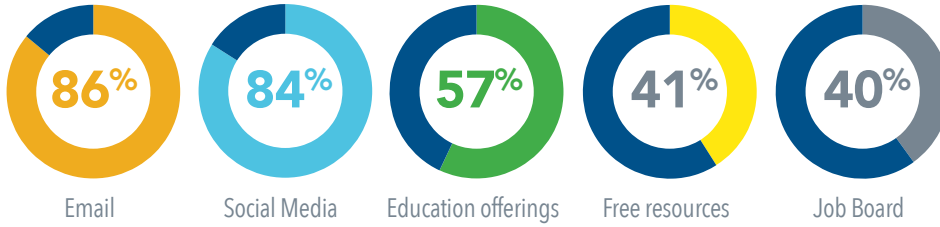
The Gap

Despite social media's effectiveness for driving traffic to association websites, only 20% of respondents feel their organization has its social media strategy well defined, and only 33% strongly agree that social media is a high priority for their organization—a slight improvement from 2017.
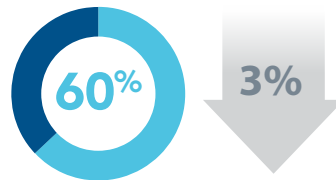
ADDITIONAL METRICS

Video is captured at your live events

62% ▼ **4%**
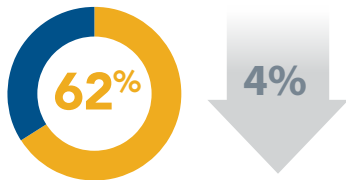
Agree/Somewhat Agree

Offer leadership development and events for young professionals

60% ▼ **3%**

Very/Extremely Valuable

Podcasting effectiveness has tripled since 2017

40% ▲ **27%**
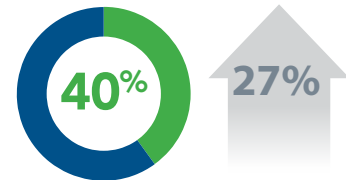
Very/Extremely effective

Source: Association Adviser Communications Benchmarking Survey

CONCLUSIONS

It is clear that association communication priorities have been changing since we published our inaugural report in 2011. However, adapting to those changes and measuring progress against those changes has been an uphill battle for many associations.

Integrating member communications continues to be a challenge, although associations *have* reported improvement in this area in recent years. However, our 2018 survey found that only one in four respondents (27%) gave their organizations a rating of 4 or 5 (on a 5-point scale) when asked how well their communications were integrated. Clearly this shortcoming remains an issue.

For the sixth time in seven years, **"information overload/cutting through the clutter"** weighed in as the No.1 communication challenge for associations—two-thirds of respondents (68%) cited it as a "significant" challenge in 2018. Meanwhile, at least half of respondents cited difficulty these three communication challenges:

1. **Communicating member benefits effectively**
2. **Customizing communications for different member segments**
3. **Engaging young professionals**

Although some positive strides were made in the areas of communicating member benefits and engaging young professionals since 2017 *(see "Bright spots" below)*, there remains a great deal of room for improvement.

In the 12 months since our 2017 study was published, we found that **associations have NOT been doing a better job of organizing their information for members or making it more accessible.** Nearly half of associations (44%) told us they **still struggle to produce video content consistently**.

Bright spots

On the bright side, our research shows that associations *do* seem to be showing modest improvement in these five important areas:

1. **Communicating member benefits effectively**
2. **Engaging young professionals**
3. **Facilitating member to member communication**
4. **Communicating legislative, regulatory and technical updates**
5. **Keeping members abreast of new events and continuing education opportunities**

On average, associations are communicating with members **31 times per month** via print, online, social media and video. While that may seem like a high frequency to many readers, 2018 marked the first time since we began this study in 2011 that the **frequency of member communication DID NOT increase from the previous year**. While the number of monthly member touchpoints appears to have stabilized, the *effectiveness* of those communication touches leaves plenty of room for improvement.

CONCLUSIONS

Case in point: Almost half of respondents (48%) felt their members had **"too many competing sources of information"** to choose from, and two-thirds of respondents felt their members were **"too busy"** to read or interact with their association's communication efforts. That's why it's so important to make every member touchpoint count and to align staffing headcount with communication resource needs.

Anecdotally, association leaders tell us they understand the importance of leveraging member data so they can better tailor their communication efforts. However, three in five respondents (58%) reported that they **did not target or segment their communications "as well as we should."** While more than half of respondents told us they customize communications sent to *certain* member subgroups, such as new members, student members and young professionals, less than one in five are customizing their communications for other important subgroups, such as mid-career members and late-career members. On the opposite end of the spectrum, only one in four associations indicated that they are customizing communications for early stage members (i.e. those who've belong for seven to 24 months).

20th century approach to 21st century challenges

Although we are two decades into the 21st century, only a fraction of respondents felt that their organizations were leveraging technology effectively for member segmentation purposes. For instance, less than half of respondents (42%) said they are using email marketing systems; less than one-third are using member database/AMS systems; and just one in six are using career centers (17%), content management systems (17%), learning management systems (15%) or marketing automation systems (18%) to aid in segmentation. Two in five respondents (41%) agreed with the statement: **"We could do a better job of promoting our communications as a member benefit."**

It should be no surprise that the number of communication channels associations use to reach members keeps expanding. Webinars and Facebook now rank among the Top 7 communication channels (out of 28 we measured), with **podcasts, apps, text messaging and private online communication showing double-digit increases** in adoption since 2017. That said, **legacy communication channels, including live events (ranked No. 1), print magazines (No. 2)** and **enewsletters (No. 3), continue to be the most highly rated member communications channels with printed member newsletters (No. 7)** and **printed show guides (No. 9)** also ranking among the Top 10. It's a simple fact—different members want to consume information differently and at different times. Embracing multiple channels is imperative to remaining relevant and engaging. But, newer isn't always better.

CONCLUSIONS

The balanced portfolio approach

Additionally, it's no longer an either/or decision; it's more a matter of maintaining a **balanced portfolio of communication options**. For instance, when it comes to digital versions of the member magazine, five times as many associations use them to **complement** their print editions than to **replace** their print editions. So, associations must do a better job of improving messaging across platforms (a significant challenge for 40% of respondents) and of customizing communication preferences for each member (a significant challenge for 50% of respondents).

As mentioned earlier, associations continue to have difficulty engaging young professionals. Segmentation and customization plays a significant role here. **The millennial generation is accustomed to looking online for whatever it needs—and expects to find it instantly**. Associations need to develop specific events, communications and mentoring opportunities unique to younger members and to prospective members. There were some noteworthy signs of improvement in this area in 2017. Leadership development conferences and events for young professionals both ranked among the six most-valued communication channels in 2018 (out of 28 measured). Further, nearly two in five respondents (39%) said they now offer mentoring programs for NextGen members.

Do you really understand your members' needs and goals?

Tracking the degree to which members are engaging—and using member data to deliver future communications—is really where **effective** communication is evolving. Nearly half of associations now are using email metrics to measure member engagement, and two in five are mining data from their website (contact us and landing pages) or social media platforms. However, only one in five respondents (20%) said they have a clearly defined social media strategy in place. Further, only one in four respondents have either a platform-specific or department-specific communication strategy in place. Despite all the technological and data management tools that have emerged since we began publishing this report in 2011, nearly three in five respondents agreed they have to **do a better job of "understanding member needs, demographics and goals."** Nearly three in five respondents agreed they have to do a better job of understanding why certain content "resonates with members" or do a better job of "customizing communication preferences" for each member.

Nearly half of respondents (46%) told us they **need to enhance their ability to "collect and use data."** We encourage readers of this report to take a step back and track the types of communications members are viewing. For instance, are they engaging with you on career development topics, technology topics or peer networking opportunities? If not, survey members or ask them directly at your events which topics are most important to them? Associations must better understand each member's interests, then send targeted communications about those topics of interest. They must stop resorting to one-size-fits-all communication blasts that are increasingly being ignored by the vast majority of members who view everything you send them through the WIIFM (What's In It for Me?) lens.

CONCLUSIONS

Additionally, respondents indicated that their members are now increasingly concerned about career enhancement, professional networking and technology topics, but they are less concerned about such long-standing staples as member news, event coverage, lobbying/advocacy, and the organization's products and resources. Take the time to adjust your offerings to meet the needs of your most active current members and newest members. What worked well five to 10 years ago may no longer be working well today.

Non-dues revenue efforts still lagging

Last, but certainly not least, there was notable concern over respondents' inability to generate non-dues revenue (NDR) from their communication vehicles. Nearly half of respondents (46%) agreed that this was a serious or significant problem, up from 41 percent in 2017. In fact, **advertising sales was the second most likely function to be outsourced by associations**, trailing only production and design.

On a related note, less than half of respondents said they are able to customize their advertising and sponsorship offerings for even their best partners. What's more, only two in five associations (43%) check with their sponsors even once per year to see if they feel they are getting their money's worth. Primary reasons for this reluctance to do so included:

- **Insufficient resources to provide metrics and analysis or address issues** (29% agreed)

- **No news is good news or don't feel we have a good enough relationship to ask** (15% agreed)

The lack of progress on the NDR side is not only disappointing, but it puts tremendous pressure on the membership department to keep dues in check in an era of rising costs and competition.

Final thoughts

All of the communication elements outlined in this report can have both a positive and negative effect on an association's ability to engage their members and generate advertising and sponsorship dollars. By employing a process of **Assessment, Integration and Measurement (AIM)** throughout a communication vehicle's lifespan, associations will begin to see improvement in this area as well.

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 plenty of 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 management 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 42-question online survey. As has been the case in previous annual studies, the 2018 survey intended to provide association leaders a comprehensive look at membership communication trends, best practices and resource investments that would be relevant for membership organizations of all sizes and industries throughout North America.

Nearly 30 percent of the 42 questions were new, and a proprietary rapid-response platform, first introduced to respondents in 2016, was again used to administer this year's survey. For multiple-choice questions, respondents were asked to check a single answer that best described their opinion about an association communication channel or issue or to select all answers that applied to their experience with an association communication 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 expensive incentives, telephone follow-up or substantial reminders to take part. In exchange for their participation, all respondents who completed at least 50% of the survey received a $10 Amazon gift card and priority access to the results.
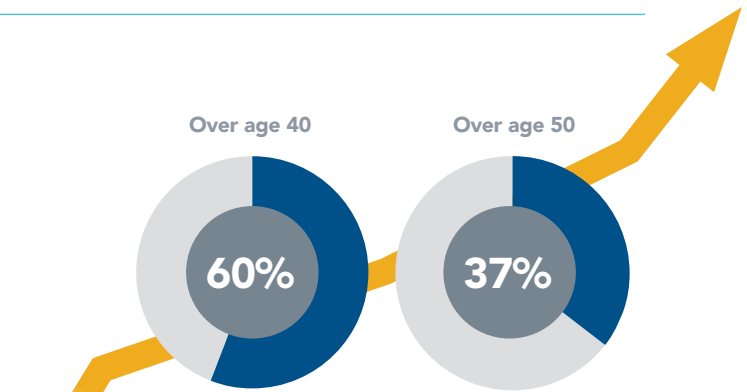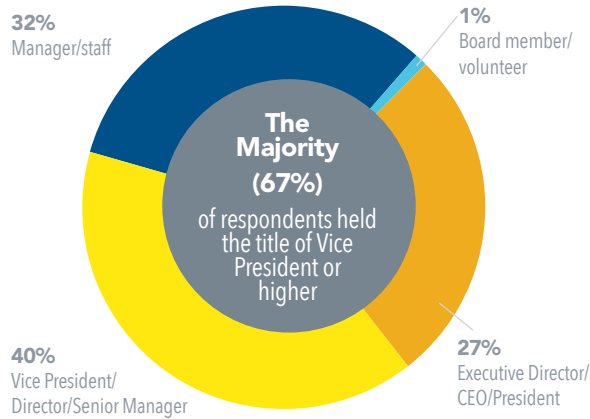
In several waves between April 2, 2018 and May 7, 2018, researchers sent the survey via email to senior staff at North American trade associations, professional societies and association management companies. The respondent pool was composed of Naylor clients and prospects (a mix of small, medium and large associations), Association Societies Alliance members in 11 states and readers of *Association Adviser* newsletter.

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 on May 7, 2018, a total of 420 surveys had been satisfactorily completed, with two-thirds (67%) coming from those who were at the level of vice president or above.

As indicated in the highlights section, this report reflects survey results through May 8, 2018, but the survey will remain open throughout the year so additional association decision-makers have the opportunity to participate. As was the case in 2017, participants also were able to compare themselves against a set of communication best practices by downloading their unique best practices report card after taking the survey.
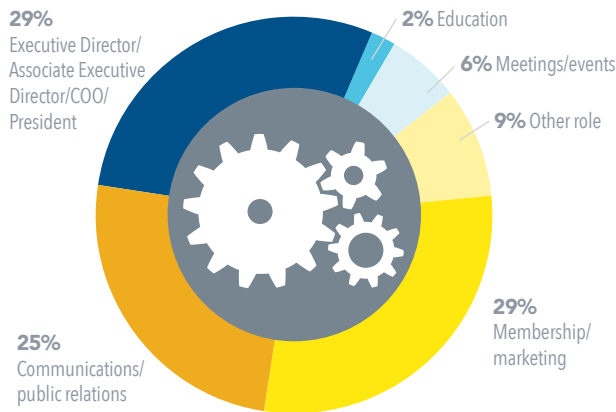
DEMOGRAPHICS

Job Title

32% Manager/staff

1% Board member/volunteer

The Majority (67%) of respondents held the title of Vice President or higher

40% Vice President/Director/Senior Manager

27% Executive Director/CEO/President

Over age 40 60%

Over age 50 37%

The majority of respondents (60%) were over age 40 and more than one-third (37%) were over age 50, which is consistent with the C-suite demographic characteristics of senior association professionals

Primary Job Function

29% Executive Director/Associate Executive Director/COO/President

2% Education

6% Meetings/events

9% Other role

29% Membership/marketing

25% Communications/public relations

Nearly 2 out of 3

Respondents had job functions that required frequent, direct member contact and communication skills: membership/marketing, communications/public relations and meeting/event planning

100 Different Industries

Respondents came from more than 100 different industries, although five classifications accounted for half (50%) of the response pool:

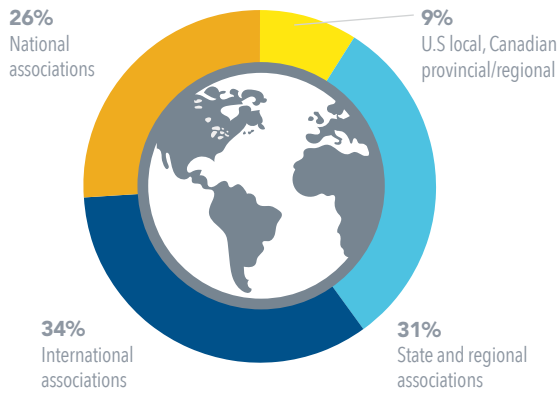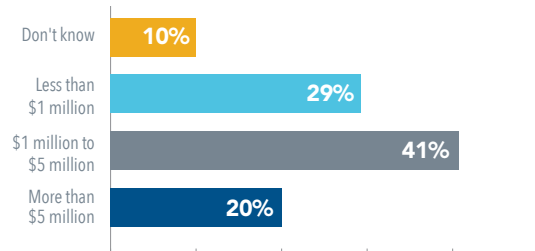Health care   Education   Building & construction   Real estate   Industrial/manufacturing

Source: Association Adviser Communications Benchmarking Survey

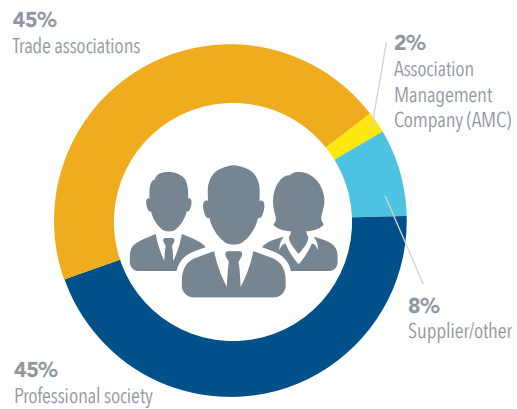# Typical respondents mirror the association world at large.

26%
National associations

9%
U.S local, Canadian provincial/regional

34%
International associations

31%
State and regional associations

Annual Operating Budget

Don't know	**10%**
Less than $1 million	**29%**
$1 million to $5 million	**41%**
More than $5 million	**20%**

41% came from organizations with annual operating budgets of between **$1 million and $5 million.**

Organization Type

45%
Trade associations

2%
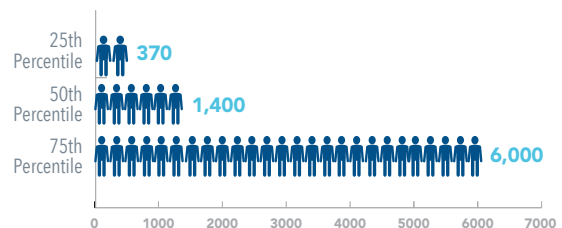Association Management Company (AMC)

8%
Supplier/other

45%
Professional society

50% of respondents came from organizations of between 370 and 6,000 members.

They were about equally split between **trade associations** (45%) and **professional societies** (45%).

Number of Association Members

25th Percentile	**370**
50th Percentile	**1,400**
75th Percentile	**6,000**

0   1000   2000   3000   4000   5000   6000   7000

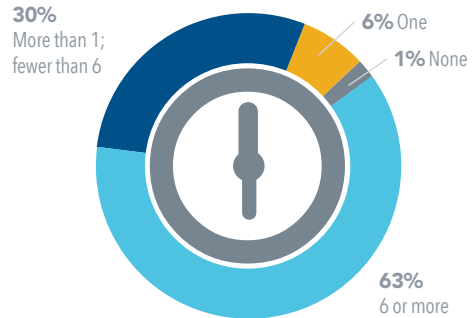*Source: Association Adviser Communications Benchmarking Survey*

Staffing

Nearly 2 in 3 came from organizations with 6 or more full-time staff

About one-third had between 1 and 5 full-time staff on payroll

and 7% had only 1 full-time staff member or less

Overall Association Staffing Adequacy

1% Overstaffed

46% Understaffed

53% Just right
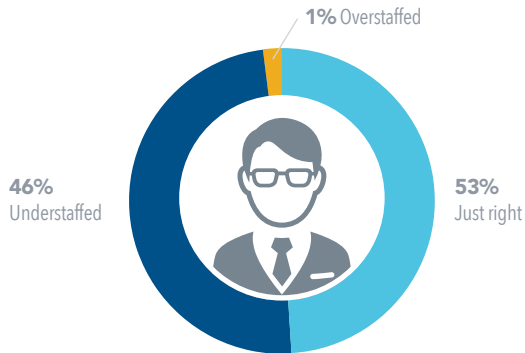
Total Staff (in Full-Time Employees [FTEs])

30% More than 1; fewer than 6

6% One

1% None

63% 6 or more

When it came to individual communication functions, respondents were somewhat more likely to feel their publishing/content creation teams are understaffed

	1 or fewer FTEs	Feel understaffed
Publishing/ content creation teams	46% (2018)	51% (2018)
	46% (2017)	54% (2017)
	58% (2016)	52% (2016)
Social media team	75% (2018)	49% (2018)
	73% (2017)	45% (2017)
	76% (2016)	45% (2016)

Communication functions most likely to be outsourced

Production design **30%**
Advertising sales **25%**
Video production **21%**
Magazines **16%**
Directory **13%**
Social media **6%**

With the exception of social media, all of the above functions were less likely to be outsourced in 2018 than they were in 2017.

Note: Total exceeds 100% due to multiple response options.

NOTE: As we witnessed earlier, midsize organizations are most likely to feel understaffed (53%), and 7 out of 8 respondents (86%) said their primary social media person spends less than half of their time on social media.

Source: Association Adviser Communications Benchmarking Survey

ABOUT THE RESEARCHERS

(listed alphabetically)

Hank Berkowitz, MBA, M.A. has more than 20 years of experience as an online editor, publisher and content strategist. Prior to joining Naylor's research team, Hank co-founded and ran day-to-day operations of the CPA Insider™ newsletter group at the 365,000-member American Institute of Certified Public Accountants (AICPA). Earlier, he founded the SECrets newsletter group at EDGAR Online, Inc. (1.2 million weekly readers), and he has held editorial and management positions with *Pensions & Investments Magazine*, CFO.com/Economist Group and CCH, a Wolters Kluwer Company.

Dave Bornmann is the Chief Marketing Officer at Naylor Association Solutions where his areas of responsibility include branding, marketing strategy, segmentation, online marketing, product marketing and social media. Dave manages communication programs for Naylor at the corporate level in addition to communications for all of Naylor's six lines of business. Additionally, he has oversight of the *Association Adviser* media properties that include a website, newsletter, TV channel and print publication focused on strategies and best practices for association executives. He has a marketing MBA from the Kellogg School of Management at Northwestern University and a BA in economics from Swarthmore College.

Sarah Sain, Director of Content, Member Communications, is responsible for the overall strategy, leadership and management of Naylor's content department. In her seven years with Naylor, Sarah has provided editorial consultation and content strategy for more than 30 associations across an array of industries. Today, she works closely with a select group of Naylor's association partners to plan, coordinate and produce their print publications and digital communications. Sarah also serves as writer and managing editor of *Association Adviser*, a website and magazine that provides thought leadership to the association marketplace. Sarah has a journalism degree from the University of Florida.

THANKS

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