

Association Communications Benchmarking Report

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ASSOCIATION COMMUNICATIONS BENCHMARKING STUDY 2016

Naylor Association Solutions has long been a leader in helping trade associations and professional societies across North America get the most out of their member communication programs. As part of its commitment to the take AIM—assessing, integrating and measuring—approach to member communications, Naylor has partnered since 2011 with more than a dozen of the state allied society 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 2,000 senior leaders of North American trade associations, professional societies and association management companies have completed our comprehensive online surveys over the last five years. Respondents, representing 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. In a fast-changing association landscape, the challenges shift often. For instance:

Year-over-year findings highlight associations' progress, but also 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.

2011

2012-2013*

2014

2015



Associations greatly underestimated communication overload and clutter.



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

2016



Associations' inability to generate non-dues revenue (NDR) from their communications appears to be a greater problem. Factors that could have a positive impact on NDR generation, such as utilizing technologies across the organization to improve customization for member subgroups, are not being fully leveraged.

*The 2012-'13 benchmarking study was based on a single survey that started in late 2012 and finished in early 2013.

REPORT HIGHLIGHTS

This report reflects survey results through May 16, 2016. 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. For the first time in this study's history, 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 onto communicationsbenchmark.naylor.com**.



Associations are communicating more frequently, and with different tools.

It may come as no surprise that associations are communicating with members more frequently and via more channels than at any time since we began this survey in 2011. On average, associations communicate with members an estimated 30 times per month (via print, online, social media and video), an increase from an estimated 26 times per month in 2015. However, the frequency with which they use various channels has changed. Print and video are being used less frequently; online/digital and social media are being used more frequently.

2015

SUN	MON	TUE	WED	THU	FRI	SAT
26 TIMES PER MONTH						






2016

SUN	MON	TUE	WED	THU	FRI	SAT
30 TIMES PER MONTH						








Source: Association Adviser Communications Benchmarking Survey

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

For the fifth consecutive year, combating **information overload/communication clutter** and the **inability to communicate member benefits effectively** remain the top two communication challenges for associations (each cited by nearly 70 percent of respondents), and **difficulty engaging young professionals** is now the third most frequently cited challenge, with customization and technical challenges falling close behind.

Top 5 Communication Challenges		2011 (first year)	2015 (last year)	2016 (this year)
	Combatting information overload/cutting through the clutter	54%	66%	69%
	Communicating member benefits effectively	32%	59%	67%
	Engaging young professionals	n/a	52%	55%
	Customizing for member segments	23%	54%	55%
	Overcoming technical barriers (e.g. spam filters, etc.)	n/a	45%	45%

Source: Association Adviser Communications Benchmarking Survey 2011–2016

Additional Communication Challenges		2011 (first year)	2015 (last year)	2016 (this year)
	Facilitating member-to-member communication	n/a	38%	43%
	Ability to consistently produce video	n/a	n/a	42%
	Maintaining position as industry's No. 1 info. source	28%	36%	42%
	Providing mobile-friendly communications	n/a	39%	34%
	Helping members find desired info. quickly	n/a	42%	33%
	Communicating legislative, regulatory, technical updates	13%	27%	23%
	Keeping members informed about new events and continuing education	14%	30%	21%

Source: Association Adviser Communications Benchmarking Survey

The number of associations that believe reader engagement is below 50% is on the rise.



Four in five associations (80%) said that **at least half of their communications are being ignored**, showing a substantial unfavorable increase from the 59 percent response in 2015.

Source: Association Adviser and Naylor Association Solutions

New and Noteworthy



ADVERTISING, SPONSORSHIP & MEASUREMENT

More than half (54%) felt their inability to generate non-dues revenue from their communications was a serious or significant problem. In 2015, this was cited by only 11% as their most severe challenge.

Nearly half (48%) thought their inability to measure their communications' effectiveness was a serious or significant problem (at least 4 on scale of 5).

Less than 1/3 said they had a process for measuring member engagement.

STRATEGY



74% said that at least half of their communications are for members only.

More than half (51%) indicated that they conduct member communication surveys every 12–24 months.

27% gave themselves a rating of at least four out of five when asked how well their communication channels were integrated.



CUSTOMIZATION

Nearly 6 out of 10 (59%) customize for new members, but less than one out of five customize for any other segment.

Only 28% believe they are effectively leveraging their member database/AMS to deliver a customized member experience.

Less than 15% feel they are effectively leveraging their career center, content management system, learning management system or marketing automation system to deliver a customized member experience.

EFFECTIVENESS



43% felt that their inability to measure their communication effectiveness was a serious or significant problem.

More than half (57%) felt they could improve member engagement with their communications by improving their ability to customize for different subgroups.

Only 14% felt that "creating relevant content" was a challenge or significant challenge.

Source: Association Adviser and Naylor Association Solutions, 2016

- More than half (54%) recognize a serious or significant problem with the lack of revenue generated from their communication vehicles.
- A strong majority (86%) believe they are good at creating relevant content, and more than half are conducting communication-specific surveys at least once every 12–24 months to stay on top of members' needs, yet 74 percent (up from 59% in 2015) still believe that more than half of their communications are being ignored.
- Although 57 percent believe they could improve member engagement by improving their ability to customize for different subgroups, not many are actually doing it.

Staffing challenges still exist.

As can be expected in these “do more with less” times, half of respondents (49%) felt their organizations were understaffed overall and even more so within their communication departments—52 percent felt their publishing/content creation teams were understaffed, and 45 percent felt their social media teams were understaffed.

When asked what they'd do with an unexpected 50-percent budget increase in their communication departments, more than half of respondents (53%) said they would invest that windfall in hiring more staff.



A few positive developments that are worth mentioning.

- Two areas in which associations seem to be improving are in the areas of **helping members find desired information quickly** (33% cited this as a challenge in 2016 vs. 42% in 2015) and **keeping members informed about new events and continuing education** (just 21% cited this as a challenge in 2016 vs. 30% in 2015).
- Legacy communication channels (live events, print magazines and e-newsletters) 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**.
- The portfolio of useful communication channels is expanding, and several new forms are gaining traction: **Facebook, webinars, online directory/buyers' guides and online career centers to name a few**.



Top 10 Individual Communication Channels

Channel	Consider very/extremely valuable	Average rating (5.0 Max)	Rank 2016	Rank 2015
Traditional Conferences/Events	90%	4.61	1	1
Member eNewsletter	73%	3.99	▲ 2	3
Webinars	54%	3.47	▲ 3	7
Member Magazine (print)	59%	3.36	▼ 4	2
Facebook	53%	3.31	▲ 5	12
Online Member Directory	47%	3.27	▲ 6	11
Online Career Center	44%	3.21	▲ 7t	13
Twitter	42%	3.21	▲ 7t	14
Video	38%	3.02	▲ 9	18
Member eZine	39%	2.95	▼ 10	9

Source: Association Adviser and Naylor Association Solutions
Calculations vary based on total responses per channel.

METHODOLOGY

After consulting with Naylor Association Solutions' senior management team, the Association Adviser team, and the executive directors of nearly a dozen allied state societies of association executives, Naylor's research team constructed a 48-question, online survey. As has been the case in our previous annual studies, the 2016 survey intended to provide association leaders a comprehensive look at membership communication trends, best practices and resource investments that would be relevant for organizations of all sizes and industries throughout North America.

A new online, rapid-response platform administered this year's survey, and nearly one-third of the questions were new. 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 the survey would be thorough and comprehensive yet also simple enough to be completed quickly and easily and without the need for expensive incentives, telephone follow-up or substantial reminders to take part. In exchange for their participation, all respondents who completed the survey received a \$5 Starbucks gift card and priority access to the results.

In several waves between April 26, 2016 and May 13, 2016, 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, readers of Association Adviser e-newsletter and viewers of Association Adviser TV. To ensure a high-level response pool, 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 16, 2016, a total of 258 surveys had been satisfactorily completed, with nearly 200 (76%) coming from those who were at the level of vice president or above.

As indicated in the report highlights section, this report reflects survey results through May 2016, but the survey remains open all year for people who would like to participate. For the first time in this study's history, participants are also able to compare themselves against a set of communication best practices by taking the survey and then downloading their unique best practices report card. To get started, **log on to communicationsbenchmark.naylor.com**.



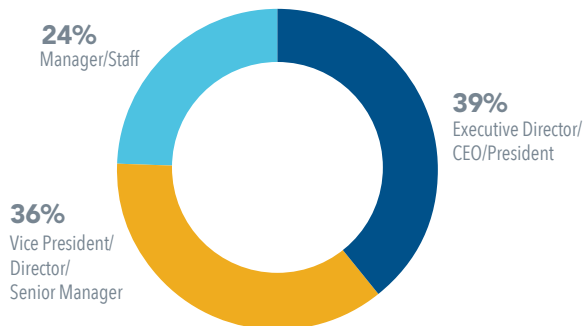
DEMOGRAPHICS

- The vast majority of respondents (76%*) held the title of vice president or higher, including nearly two in five (39%) who held the title of executive director, CEO or president.
- The majority of respondents (57%) were over age 40, including 29 percent who were over age 50, which is consistent with the C-suite demographic characteristics of senior association professionals.



*VP, executive director cohort rounded up to 76 percent

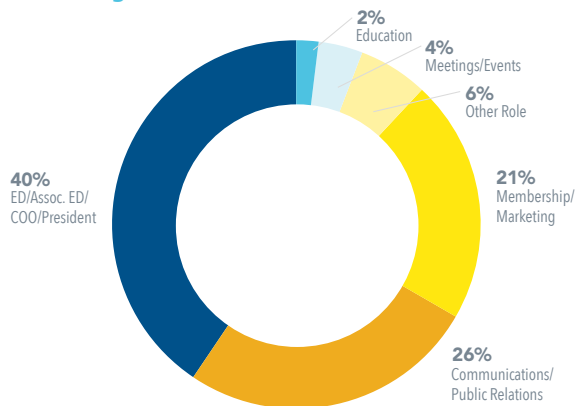
Job Title



Source: Association Adviser and Naylor Association Solutions, 2016

- More than half of respondents (53%) were in job functions that required frequent, direct member contact and communication skills: membership, marketing, communications, public relations and meeting/event planning.

Primary Job Function



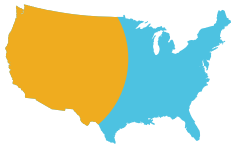
Source: Association Adviser and Naylor Association Solutions, 2016

- Respondents came from more than 100 different industries, although five classifications accounted for half (51%) of the response pool: healthcare, education, building & construction, AMCs and government.

Typical respondents mirror the association world at large.



More than 7 in 10 respondents (72%) were female.



Slightly more than half (52%) were from state and regional associations.

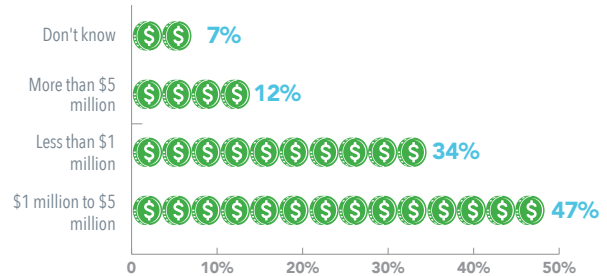


Nearly half of respondents (47%) came from organizations with annual operating budgets of between \$1 million and \$5 million.

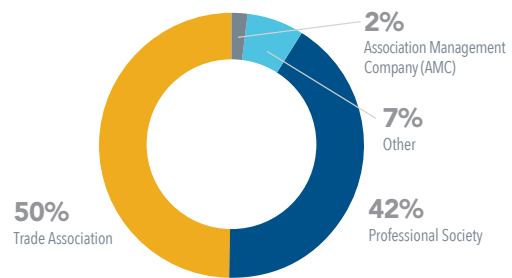


The median 50 percent of respondents came from organizations of between 400 and 4,200 members. They were about equally split between trade associations (50%) and professional societies (42%).

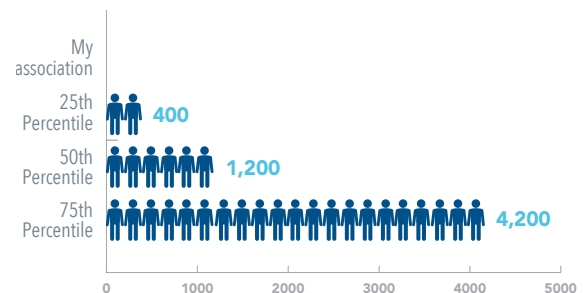
Annual Operating Budget



Organization Type



Number of Association Members



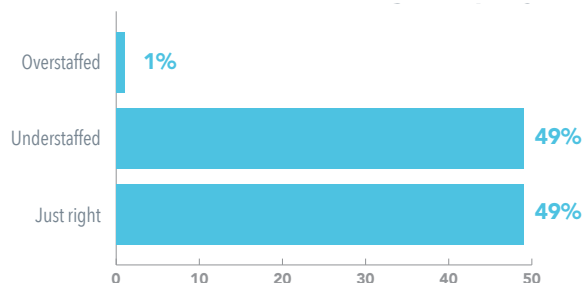
Source: Association Adviser and Naylor Association Solutions, 2016

STAFFING

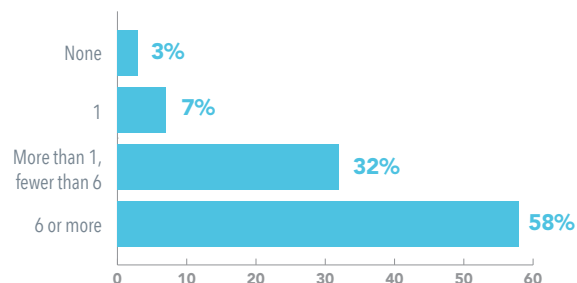
- Nearly three in five respondents (58%) came from organizations with six or more full-time staff.
- About one-third of respondents (32%) had between one and five full-time staff on payroll.
- 10 percent of respondents had one full-time staff member.
- While nearly half of respondents felt they have the right amount of staff, alarmingly 49 percent felt their organization was understaffed.













Overall Association Staffing Adequacy



Total Staff (in FTEs)



- When it came to individual communication functions, respondents were more likely to feel their publishing/content creation teams were more understaffed than their social media teams—even though social media teams had, on average, fewer full-time staff.

	1 or fewer FTEs	Feel understaffed
 Publishing/ Content Creation	58% (2016) 	52% (2016) 
	52% (2015) 	45% (2015) 
 Social Media	76% (2016) 	45% (2016) 
	69% (2015) 	44% (2015) 

Source: Association Adviser and Naylor Association Solutions

COMMUNICATION PLANNING

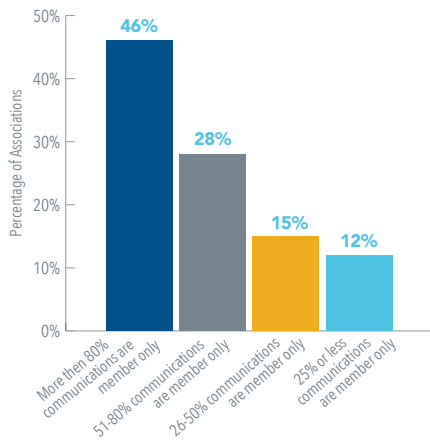
The earmark of a successful association communication program is one that has a staff willing to take the time to develop a comprehensive plan. The following section reviews a few takeaways from the communication planning section of this year's study. For a comprehensive look at results of all data,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

Communication Strategy Takeaways



Seventy-four percent of associations said at least half of their communications are for members only, up from 67 percent of associations reporting the same in 2015. The percent of associations stating their content is "80 percent restricted" increased to 46 in 2016, up from 35 percent last year.

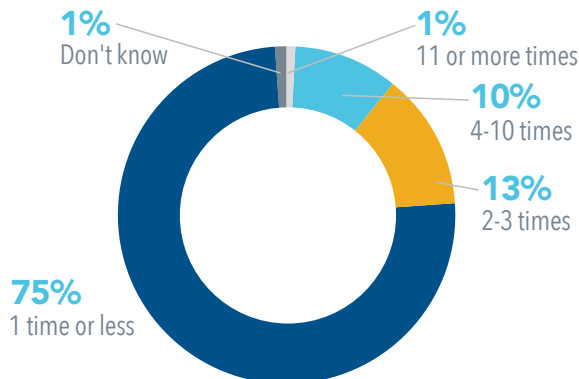
Three out of four associations report that the majority of communications they produce are intended for members only.



Source: Association Adviser and Naylor Association Solutions, 2016

Print remains viable event in this digital age. One in four associations (24%) still communicates with members multiple times per month via print.

Monthly Print Communication Frequency

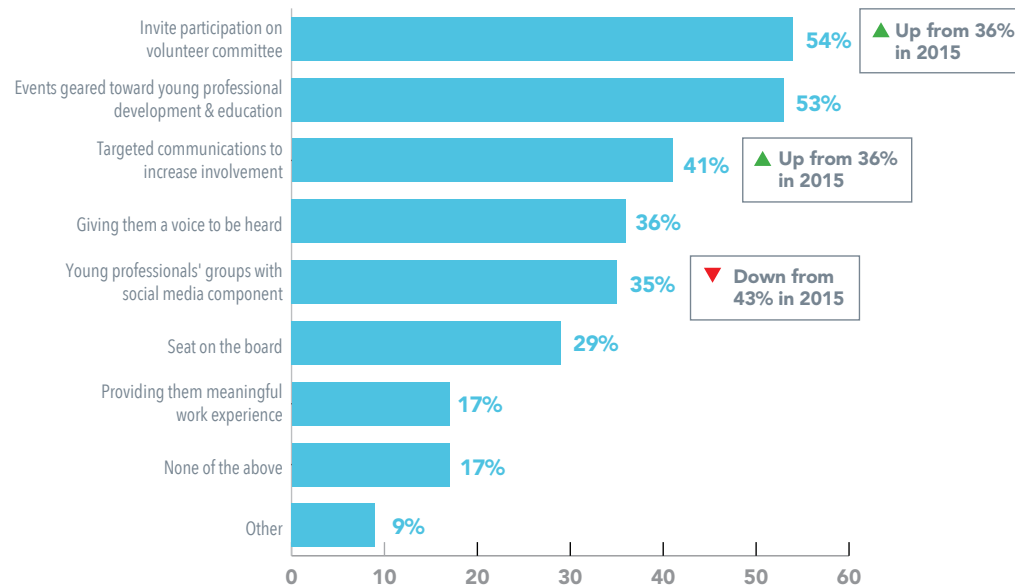


Source: Association Adviser and Naylor Association Solutions, 2016

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

- Inviting them to participate on volunteer committees (54%).
- Gearing events toward young professional education and development (53%).
- Creating communications targeted to younger members (41%).

Association Approach to Next-Generation Member Engagement



Source: Association Adviser and Naylor Association Solutions, 2016

Association professionals remain prudent about their communication budgets:






The focus is on improving what they have (and staffing accordingly) rather than on new launches.

	2015	2016	% Chg
Improve mobile strategy	39%	48%	+9%
Hire more staff	46%	53%	+7%
Upgrade publishing tools, technologies or processes	47%	54%	+7%
Improve quality of existing communication vehicles	53%	54%	+1%
Launch new communication vehicles	27%	26%	-1%
Put more muscle behind social media	32%	31%	-1%

Communication Effectiveness Takeaways



Associations continue to struggle with forces in and out of their control.

Top 5 Communication Challenges	2011 (first year)	2015 (last year)	2016 (this year)
 Combating information overload/cutting through the clutter	54%	66%	69%
 Communicating member benefits effectively	32%	59%	67%
 Engaging young professionals	n/a	52%	55%
 Customizing for member segments	23%	54%	55%
 Overcoming technical barriers (e.g., spam filters, etc.)	n/a	45%	45%

The number of associations that believe reader engagement is below 50% is on the rise.



Four in five associations (80%) said that **at least half of their communications are being ignored**, showing a substantial unfavorable increase from the 59 percent response in 2015.

Majority of resources/strategies needed to increase member engagement center around data usage, content relevance and customization.



- More than half of respondents felt they could improve member engagement with their communications by improving their ability to customize for different subgroups, by improving their understanding of what makes content relevant, by getting a better handle on member needs and goals, and by enhancing their ability to collect and use member data more effectively.

Source: Association Adviser and Naylor Association Solutions, 2016

More than one-third of respondents include content and/or data in their membership directory to strengthen the product as a valuable industry resource.



Communication Customization Takeaways



Most Important Topics to Members

How-to/Best Practices		Information About Products/Resources	
Networking with Industry Peers		Member News	
Career/Professional Development		Coverage of Key Industry Events	
Industry News/Trends		Programs for Young Professionals	
Lobbying/Advocacy		Industry Job Openings	
Technology		Data/Stats for Improving Job Performance	
		Succession Planning	

Best Ways to Gauge Member Needs



At least three in four respondents cited face-to-face interaction at live events or their annual meeting.



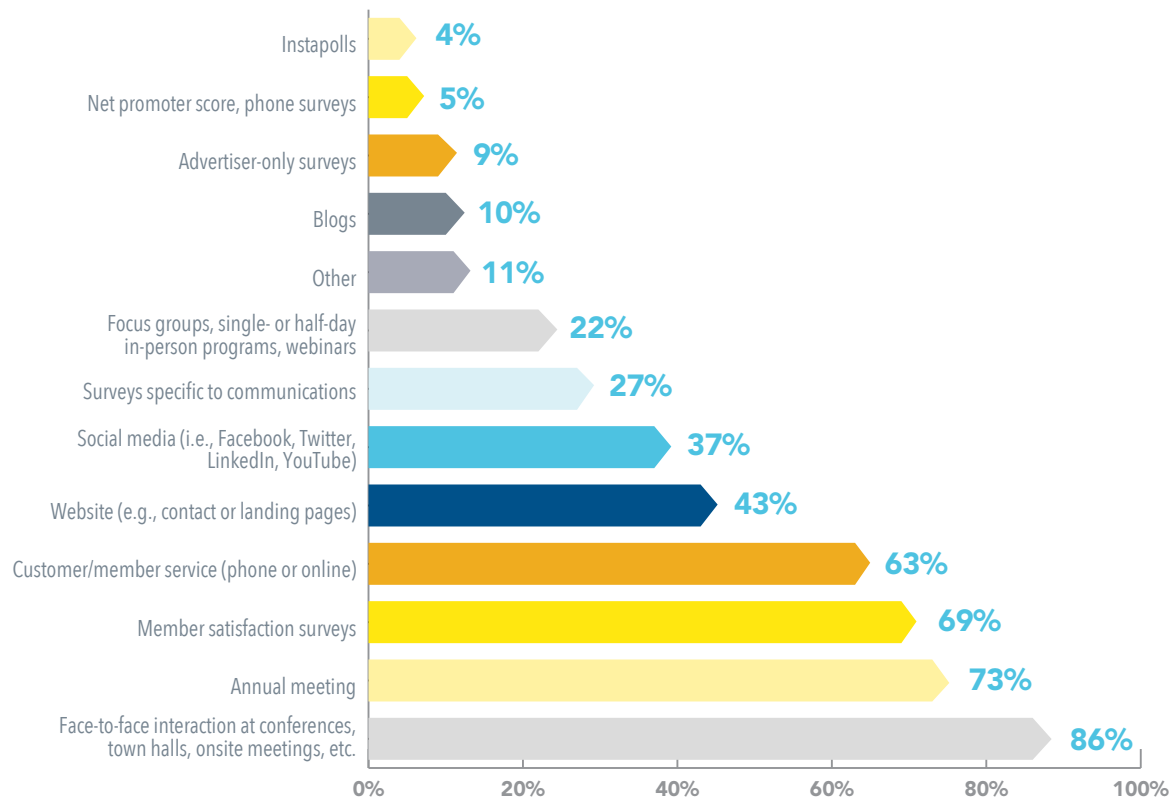
Two-thirds of respondents cited member satisfaction surveys or member service calls/emails.



Roughly two out of five cited social media or the association website.

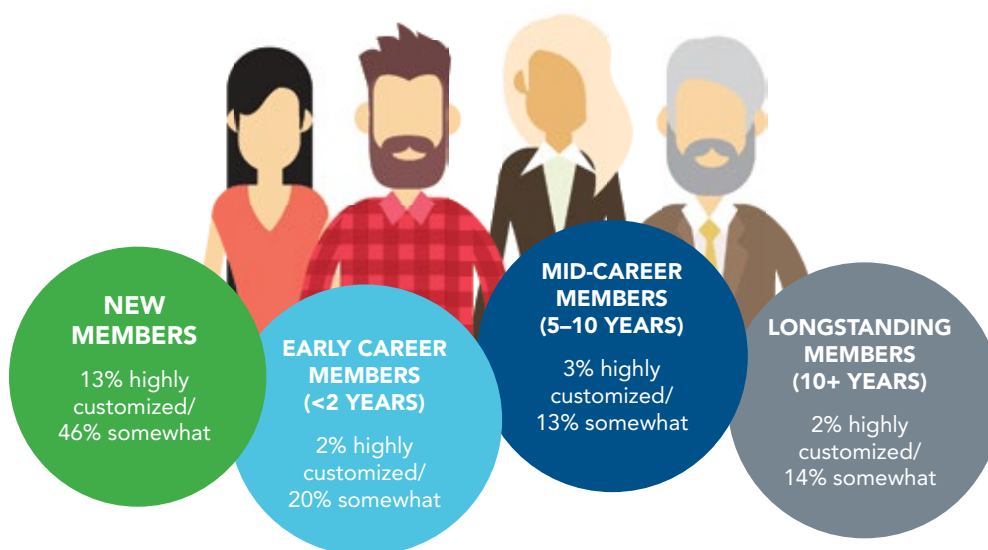
Source: Association Adviser and Naylor Association Solutions, 2016

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



Note: Total exceeds 100% due to multiple response options.
Source: Association Adviser and Naylor Association Solutions, 2016

Associations still need to work on customizing communications for important member subgroups.



Source: Association Adviser and Naylor Association Solutions, 2016

Unfortunately, technology is not being fully leveraged to deliver a customized experience.

Respondents utilize the below technologies to deliver a customized member communication experience.

Email Marketing System	34% agree
Member Database/AMS	28% agree
Career Center	15% agree
Content Management System (CMS)	13% agree
Learning Management System (LMS)	12% agree
Marketing Automation System	7% agree

Advertising, Sponsorship and Measurement Takeaways



Too many associations still rely on an outdated, one-size-fits all sponsorship mentality.

48% offer some customization (mostly for best partners)

42% Survey their advertisers/sponsors annually

8% fully customize for each sponsor

A promising number of associations hit the “sweet spot” for member communication surveys.



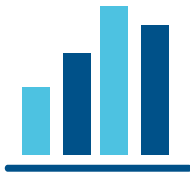
More than half (51%) survey their members every 12–24 months in an effort to improve their communications.

Low email engagement implies that associations still struggle to provide content that resonates.



Only 24 percent of respondents reported a click-to-open rate of 20 percent or higher for their most popular digital publication, and 37 percent did not know where they stood on this important email

Associations typically not using enough data points for measuring engagement.



Only 32 percent have a 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 one-third of respondents:



Attendance at events (53%)



Committee participation (41%)








Membership tenure (34%)

COMMUNICATION VEHICLES






Top 5 Individual Communication Channels

CHANNEL	% Consider Very/ Extremely Valuable	Average Rating 5.0 Max
 Traditional Conferences/Events	90%	4.61
 Member eNewsletter	73%	3.99
 Webinars	54%	3.47
 Member Magazine (print)	59%	3.36
 Facebook	53%	3.31

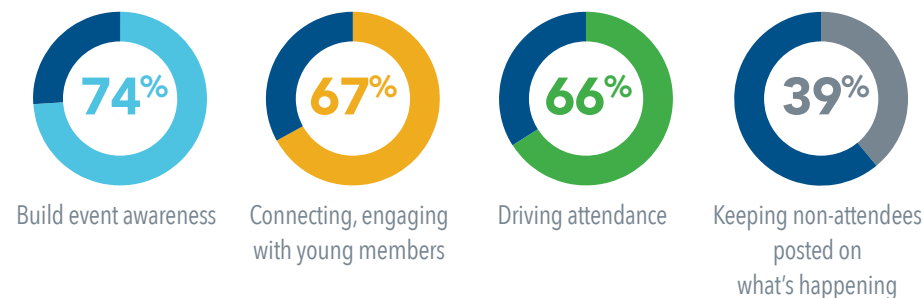
Calculations vary based on total responses per channel.

Live events remain the most highly valued of association communication channels.

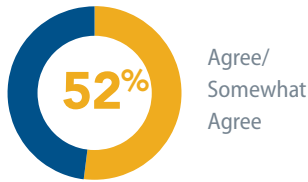
Perceived Value of Various Event Types

 Traditional Events	90% reported Very/Extremely Valuable
 Appointment-Setting Events	34% reported Very/Extremely Valuable
 Virtual Events	19% reported Very/Extremely Valuable

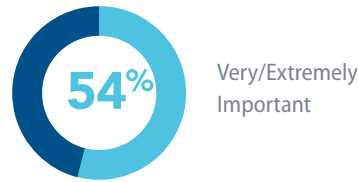
Most Important Reasons for Using Social Media at Events



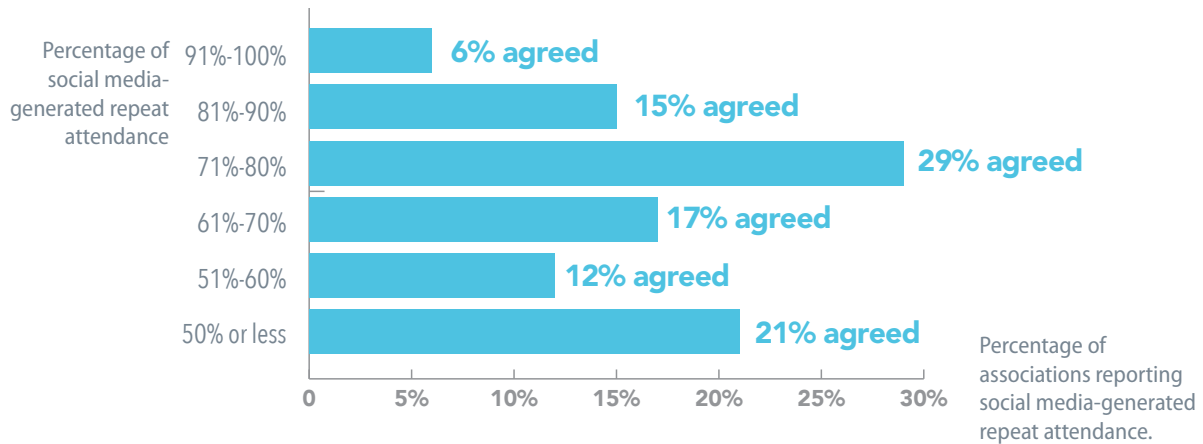
Video Is Captured at Your Live Events



Offer Leadership Development and Events for Young Professionals



Only one out of five associations generates 80% or greater repeat attendance at their largest annual event.



Source: Association Adviser and Naylor Association Solutions, 2016

CONCLUSIONS

It's clear that communication priorities have been changing since our first report in 2011.

Integrating communications continues to be a challenge for associations, though more associations report improvement in this area in recent years. However, only 27 percent of 2016 respondents gave themselves a rating of 4 or higher on a 5-point scale when asked how well their communications were integrated, so this is clearly still a challenge.

"Cutting through the clutter" is another challenge identified a few years ago—tied to the widespread increase in digital communications. The first reporting of this challenge occurred before social media starting gaining momentum. With social media use on the rise, this challenge becomes even more pronounced. In fact, cutting through the clutter remains the No. 1 challenge identified as part of this year's survey.

In general, associations are doing a better job at organizing information and making it accessible to their members, as well as keeping their members informed about new events and education. On average, associations are communicating with members an estimated 30 times per month via print, online, social media and video alone, up from an estimated 26 times per month in 2015. But more is not necessarily better. It's more critical than ever to make every message count. And, while associations appreciate the importance of segmenting member data to provide tailored communications to combat the "overload" challenge, a relatively small percentage feel they are leveraging technology available to do this effectively.

The number of communication channels that associations use is also expanding with webinars and Facebook ranking higher in value than in past years. Legacy communication channels, including live events, print magazines and e-newsletters, continue to be among the most highly rated member communications channels. It's a simple fact—different people want to consume information differently, so embracing multiple channels is imperative to remaining relevant and engaging.

Another important challenge for the last few years has been associations' ability to engage young professionals. Segmentation and customization of communications plays a significant role here. The millennial generation is accustomed to looking online and looking for whatever they need. Associations need to develop specific events, communications and mentoring opportunities unique to this group. There were some signs of improvement in this area for 2016.

Tracking how members are engaging—and using that information to deliver future communication—is really where *effective* communications is evolving. The simplest example is removing people who have registered for an event or webinar from future marketing communications about that event. Take another step and track the types of communications someone is viewing. Are they engaging with you on career development topics, advocacy topics or peer networking opportunities? Associations must understand member interests, then send more communications on those topics.

Last, but certainly not least, there was notable concern over associations' inability to generate non-dues revenue from their communication vehicles, with more than 54 percent indicating this was a serious or significant problem. All of the things outlined in this report can have both a positive and negative effect on an association's ability to generate advertising and sponsorship dollars. By employing a process of assessment, integration and measurement 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 are making progress, but there is still much room for improvement.



ABOUT THE RESEARCHERS

(listed alphabetically)

Jill Andreu, vice president of content strategy and development, is responsible for the overall strategy, leadership and management of Naylor's content department. Jill is also responsible for execution of Content 360, a fee-based program that provides content strategy and leadership to the association marketplace and gap analysis, a survey process to help associations improve their communications. Jill started her Naylor career in 2003 as an editor after working as a news desk copy editor at *The Gainesville Sun*. From 2006–2014, Jill moved through the Naylor ranks from managing editor to association account manager to publisher and group publisher, managing client relationships, inside sales and business growth. She has worked with nearly 100 associations on content strategies.

Hank Berkowitz, MBA, M.A. is moderator in chief of the *Association Adviser eNews*. He has more than 20 years of experience as an online editor, publisher and content strategist. Prior to joining Naylor, Hank co-founded and ran day-to-day operations of the CPA Insider™ e-newsletter group at the 365,000-member American Institute of Certified Public Accountants (AICPA). Earlier he founded the SECrets e-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 vice president of marketing at Naylor Association Solution where his areas of responsibility include branding, marketing strategy, segmentation, online marketing, product marketing and social media. Dave manages communications 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, e-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.

Dana Plotke is marketing manager for Naylor Association Solutions. Dana has been a core part of the development team for the association communications benchmarking study since 2011. She has more than 20 years of experience in B2B marketing, communications and research.

Dana has spoken at numerous national and regional association events on the topic of association publishing and integrated marketing and communications—including conferences held by Association Media & Publishing (AM&P), the Texas Society of Association Executives (TSAE), California Society of Association Executives, National Bankers Association and the National Association of Trial Lawyer Executives.

THANKS

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The Association Executives of North Carolina (AENC); the California Society of Association Executives (CalSAE); the Florida Society of Association Executives (FSAE); the Georgia Society of Association Executives (GSAE); the Kentucky Society of Association Executives (KSAE); the Indiana Society of Association Executives (ISAE); the South Carolina Society of Association Executives (SCSAE); the Tennessee Society of Association Executives (TNSAE); the Texas Society of Association Executives (TSAE); and the Virginia Society of Association Executives (VSAE).



If you would like assistance conducting a communication gap analysis in your market, contact us today for more information.

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