

# Executive Summary

## Looking Forward 2019

An Environmental Scanning Whitepaper  
for the Association Industry



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For the full report, visit the Association Laboratory Knowledge Center at [associationlaboratory.com](http://associationlaboratory.com)

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# Letter from the President

**Association Laboratory helps trade and professional association leaders make faster, more effective strategy decisions, with less risk.** Since 1999 we've provided full-service research and strategy services to associations informing decision-makers on how to improve Mission-based and business outcomes. The company supports a global client base from offices in Washington, DC and Chicago, IL.

In addition, Association Laboratory is a national leader in the provision of research-driven, peer-led association sector research and the delivery of CAE eligible strategic education for senior association executives.

Consider some of our key services.

**Futures Research** – Association Laboratory leads collaborative engagements designed to help you understand the future facing your members and how you need to adapt your association's strategy to be successful.

**Strategic and Membership Value Proposition** – Association Laboratory helps you identify the most relevant benefits and create customized membership models designed to improve membership retention and acquisition.

**Strategic Planning** – Association Laboratory leads strategic planning engagements informed by state-of-the-art research and facilitated by experienced executives to help you create actionable strategic plans.

**Education Strategy** – Association Laboratory helps you develop effective education strategy and distinct educational offers designed to improve member competencies while achieving the association's business goals.

**Content Strategy** – Association Laboratory helps you define relevant content, create a unifying content strategy and create monetization strategies helping you translate your unique content into expanded market reach, stakeholder leadership and financial performance.

**Meetings Strategy** – Association Laboratory helps you define the meeting value proposition and integrate your face-to-face events with other association initiatives to create a holistic experience designed to improve attendee engagement, exhibitor participation and financial performance.

**Global Strategy** – Association Laboratory helps you determine the viability of global efforts and develop customized models to help you successfully engage local audiences throughout the world.

I hope this Executive Summary of *Looking Forward*<sup>™</sup> 2019 helps inform your decisions and never hesitate to contact us if we can be of assistance.

*Dean West*

Dean West  
President and Founder  
Association Laboratory Inc.



As the world in which we live and work continues to change at an ever-increasing pace, it's more important than ever to inform association decisions and strategy with the most relevant, up-to-date, and objective information available.

Now in its 8<sup>th</sup> year, **Association Laboratory's *Looking Forward*<sup>™</sup> series is the longest-running and most comprehensive association industry environmental scan.**

Each year, the study asks hundreds of senior association executives – representing dozens of industries and thousands of individual members and member companies – about the factors affecting association members and the effect of these factors on association strategy.

This year the study builds on past years, identifying influential factors and their strategy implications in five key areas of the association environment:

- **Economic Factors** identified as having substantial impact on the industry and professional structure of association members.
- **Information & Technology Factors** identified as having substantial impact on the technology and communications underpinning industry and professional activity.
- **Workforce Factors** identified as having substantial impact on the movement, use, and competencies of individuals.
- **Government Factors** identified as having substantial impact on the relationship between association members and local, state, and federal governments.
- **Global Factors** identified as having substantial impact on relationships between individuals, companies, and governments across international boundaries.

**In addition, this year's study includes a new section focusing on solutions.**

Drawing on findings from previous qualitative research, the study tests 30 potential market-facing solutions that associations are using to address the challenges they're facing, and 9 potential internal solutions to improve organizations' ability to successfully implement change.

We hope that by increasing their understanding of significant near-term changes in the environment, associations can inform their members on how best to prioritize their technology, workforce, and operational investments to address or take advantage of these changes.

We believe that all associations can benefit from knowledge of their peers' ideas and expectations about the solutions that can help the industry successfully navigate the business environment, now and in the future.

## Methodology Notes

Association Laboratory developed and deployed an online survey directly and through the company's research partners. Data collection took place between November 13 – December 10, 2018.

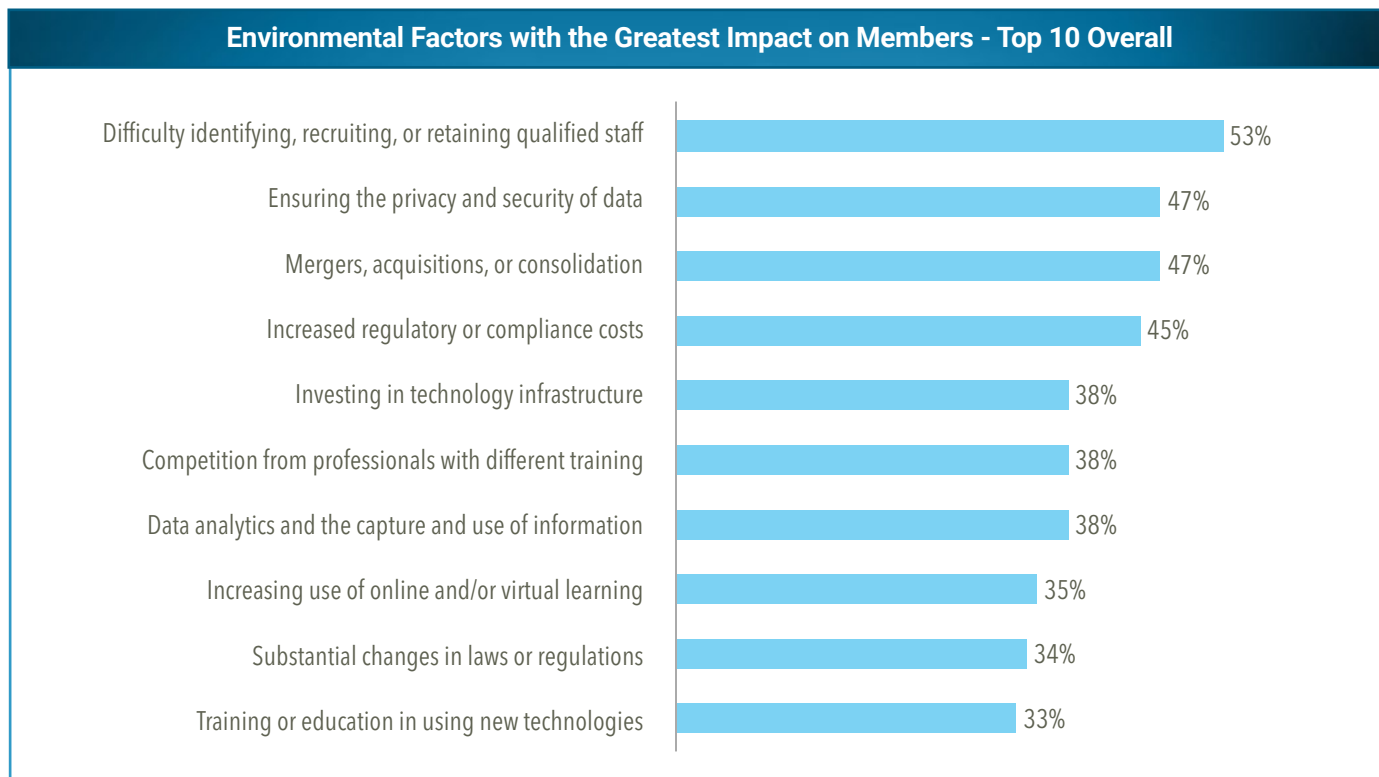
- 372 total participants
- Respondents include:
  - 285 association chief staff officers and senior/executive staff
  - 87 association domain staff
  - 29% of respondents from trade associations
  - 71% of respondents from professional associations
- Over 20 different professions and industries represented

# Overview of the Association Business Environment

## Top Environmental Factors Influencing Association Members

For *Looking Forward™* 2019, Association Laboratory tested **53 business environmental factors** affecting organizational and individual association members.

Respondents identified the top three environmental factors they believe will have the most impact on their members within each key area. The graph below shows the top 10 most frequently selected environmental factors, from four of the five key areas (economy, information & technology, workforce, and government).<sup>1</sup>



The factor most commonly expected to impact association members in the coming year is *difficulty identifying, recruiting, or retaining qualified staff*, which was selected by 53% of respondents. This factor was also the top overall factor in 2018. Along with *greater competition from professionals with different training* (38%), this points to a highly competitive and increasingly complex human resources environment.

The second-most selected factors in 2019 are *ensuring the privacy and security of data* and *mergers, acquisition, or consolidation*, both of which were selected by 47% of respondents.

Overall, 5 of the top 10 factors expected to impact association members relate to the Information & Technology domain.

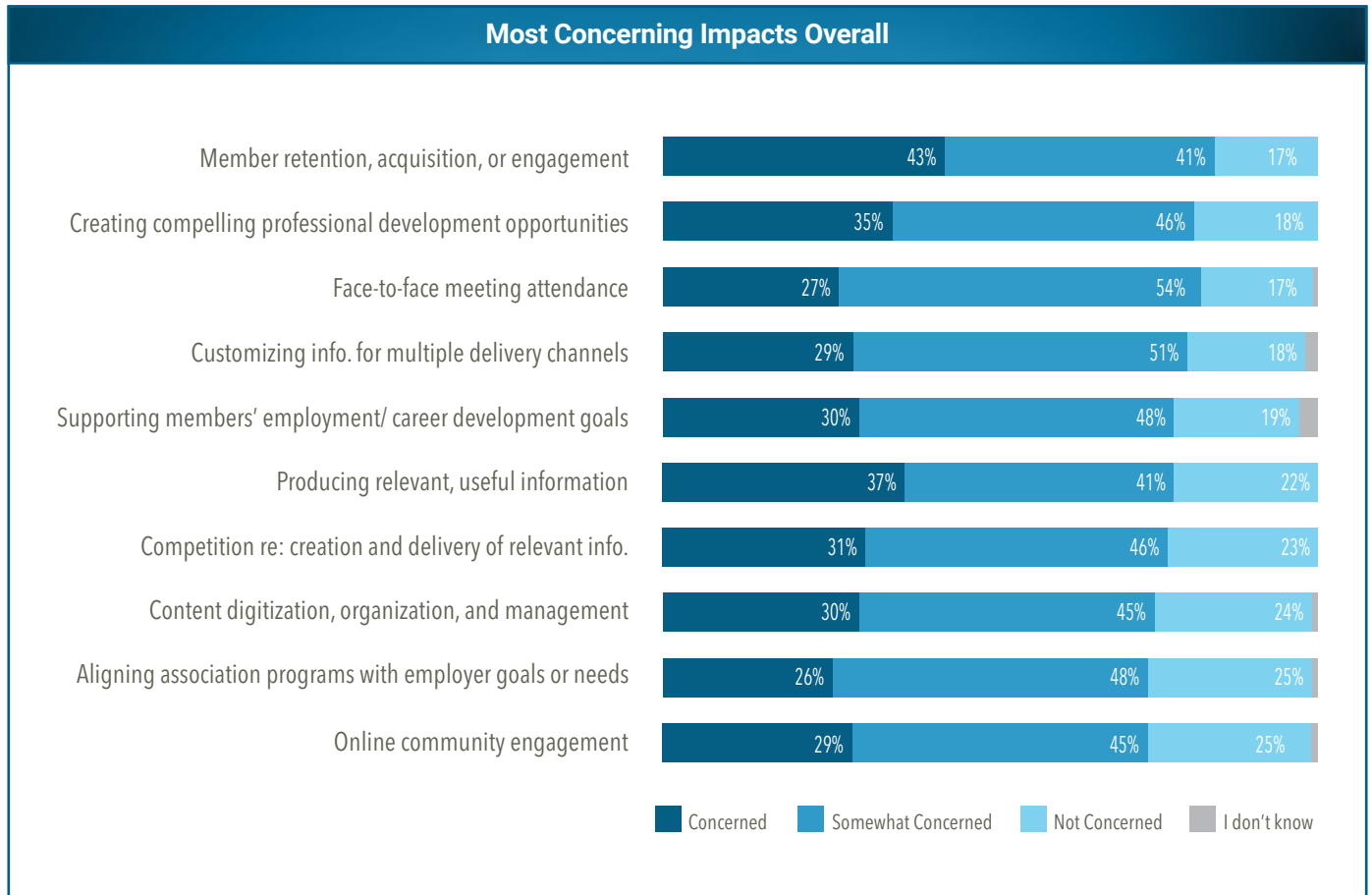
The 2019 data highlight the variety of concerns that accompany members' increasing reliance on technology and the need to adapt to it in a sustainable way.

Beyond just being able to capture and analyze data, association members need to be able to ensure data privacy and security, create and maintain a sustainable technology infrastructure, learn how to best use new tech tools, and apply these tools effectively to create real value.

<sup>1</sup>Because the Globalization questions were only presented to a subset of respondents (associations with an international or global scope), the results of this key area are not included in the top 10 overall.

## Top Impacts on Association Strategy

Looking Forward™ 2019 tested **51 potential impacts on association strategy**. The graph below shows the overall top 10 impacts.<sup>2</sup>



In exploring the themes present in the data, Association Laboratory has identified the following key trends within the association environment:

- Content strategy is the leading strategy for creating non-transactional relationships with stakeholders
- Membership and community continue to be vital to success
- Face-to-face meetings face unprecedented challenges

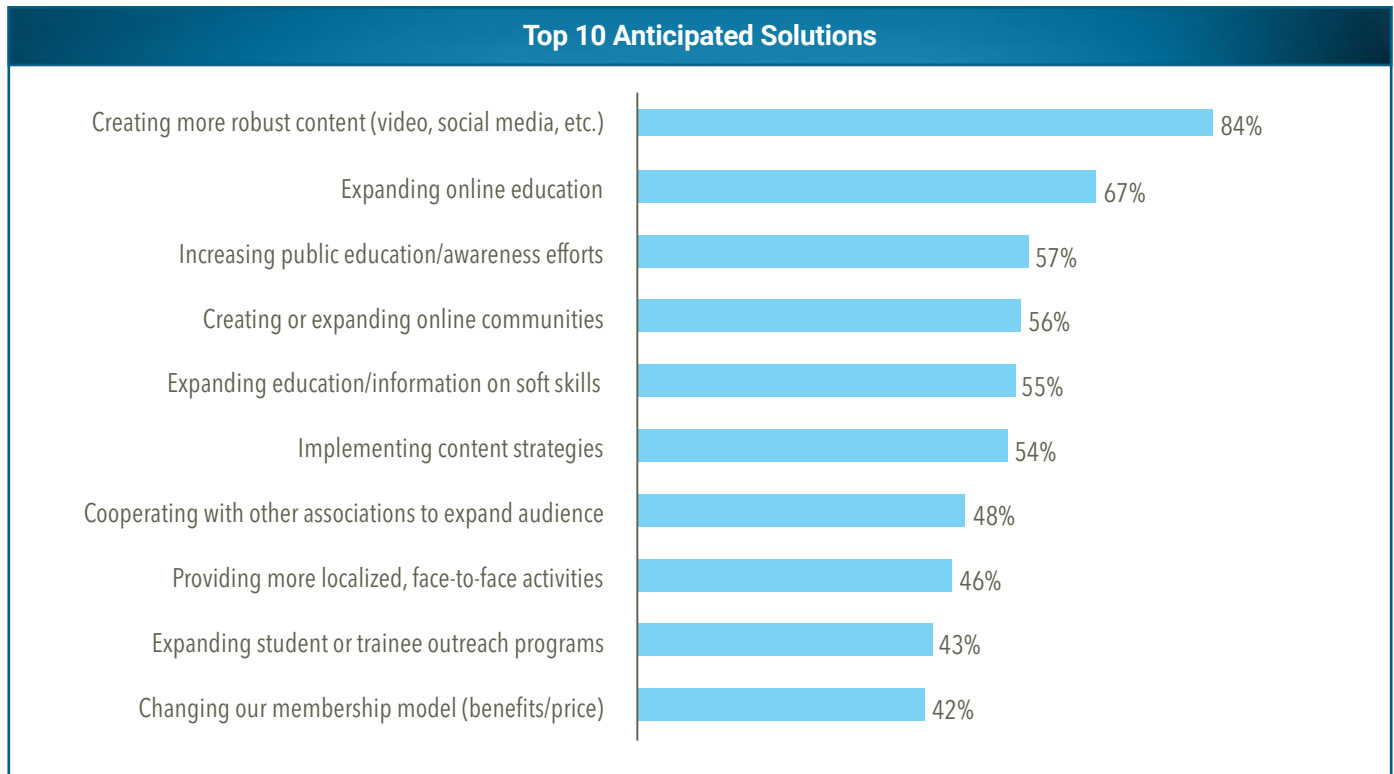
For a more detailed analysis of these trends, see the full report.

<sup>2</sup>Impacts are shown in order of (% Concerned) + (% Somewhat Concerned).

## Top Anticipated Solutions

Association Laboratory tested **30 potential solutions to the challenges facing associations**, asking respondents to indicate which ones they anticipate doing in the next 12 months.

The graph below shows the top 10 solutions overall that respondents anticipate trying.



Association Laboratory identified several themes among the top solutions, including::

- The primacy of content strategy
- The need to expand market outreach
- The need for innovative membership model design

Overall, Association Laboratory found that the changing circumstances of members are influencing traditional association strategies so heavily that associations are now working to implement more holistic digital and local models to improve engagement, and increasing outreach to new audiences and complementary organizations to increase the reach of these models.

For more detail on these findings, see the full report.

# Organizations Advancing the Profession

Data-driven decisions and future-focused information have never been more important to helping associations create sustainable, successful strategy.

Association Laboratory is happy and proud to thank the following research partners for working with us to promote *Looking Forward*<sup>™</sup> and for encouraging their members to participate. We appreciate their commitment to advancing the association profession.



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American Association of Medical Society Executives



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Georgia Society of Association Executives



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California Society of Association Executives



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Iowa Society of Association Executives



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Colorado Society of Association Executives



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Ohio Society of Association Executives



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Florida Society of Association Executives



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Tennessee Society of Association Executives

Without our partners' commitment to data-driven, high-value strategic research, our ability to provide you with this environmental scan of the association business environment would be more difficult. Please seek out these industry-leading associations and thank them for their support of association leaders.



# About Association Laboratory

## Principal Authors | *Looking Forward™* 2019

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Dean West is a futurist who has been conducting environmental scanning within the association community for nearly 20 years.

He is a Fellow of the American Society of Association Executives and a former association CEO. He has served as Chairman of the ASAE Professional Development Council and as a member of the ASAE Membership Council. He is also a former member of the Board of Directors of the Association Forum.

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Meg Whedbee is an analyst with Association Laboratory, responsible for leading client engagements and conducting qualitative and quantitative research specific to client goals, including strategic planning and membership strategy.

Prior to Association Laboratory, Ms. Whedbee worked with a variety of industries including global public health and labor market research. She holds a Master of Public Policy degree from American University and a BA in Economics from New College of Florida.

Association Laboratory helps association leaders **make better strategic business decisions** through **collaborative engagements** led by **experienced executives** and informed by **state-of-the-art research** designed to **achieve measurable outcomes**.

Association Laboratory specializes in **research, strategy and strategic education** for trade and professional association leaders. From membership and meetings through global expansion and education, the company has served leading associations through offices in Chicago, IL and Washington, DC since 1999.

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