



2016 Membership Marketing BENCHMARKING REPORT



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Dear Colleague,

Allow me to present you with Marketing General Incorporated's *2016 Membership Marketing Benchmarking Report*.

For the 8th straight year, MGI has conducted its Membership Marketing Benchmarking Survey to analyze and track the strategies and tactics that membership organizations use to recruit new members, engage and renew those members, and reinstate lapsed members. This year we have a total of 828 unique associations—individual member associations, trade associations, and associations combining characteristics of both—to thank for their participation in this study.

We are very grateful to our survey participants. Year after year, they step up to the plate and allow us to study all the membership enhancement strategies they are using today and whether they are successful or not.

Take the time to read the answers to the open questions. This is where our respondents reach out and tell us their personal experiences with membership growth, member satisfaction, their most popular benefits, payment plans, how and when they raise their dues, and what keeps them up at night worrying about their organization.

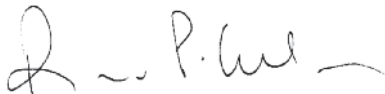
While last year was a stabilizing year in membership growth, this year the number of associations showing growth has increased, and the number of associations reporting a decrease has dropped.

Some communication methods and best practices have changed, and some have remained constant, and each type of organization has its own experiences.

This report represents the combined efforts of our research and creative teams, and we hope that it helps you gain knowledge and understanding so that ultimately you can put its findings to work for your organization.

Call me, email me, or contact us through our website with any questions, thoughts, comments, and suggestions on this and future reports.

Sincerely yours,

A handwritten signature in dark ink, appearing to read "R. P. Whelan", with a long horizontal flourish extending to the right.

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EXECUTIVE SUMMARY



For the eighth consecutive year, Marketing General Incorporated (MGI) is proud to present our annual *Membership Marketing Benchmarking Report*, which explores the membership marketing initiatives and outcomes of 828 participating associations.

Our research yields a broad base of strategic and tactical information, including: primary challenges to growth, changes in dues, uses of social media, successes in recruitment and engagement, tactics in renewals and reinstatement, marketing budgets, changes in membership categories, and more.

This year, we changed some of the questions to provide us with a greater understanding of not only what channels we are using, but which are the most effective at acquiring and retaining members. A focus for this year is on member engagement and the expanding use of social media.

OBJECTIVES

The purpose of this study continues to be the development of meaningful benchmarks by which the leadership of individual membership, trade and hybrid associations (those that have both individual and organizational memberships) can evaluate their own membership marketing strategies and tactics.

FINDINGS

Associations are once again on a path of growth.

While last year was described as a “stabilizing” year in membership growth, the percentage of associations showing growth (2016: 49% vs. 2015: 46%) has increased, while we see a drop in the number of associations reporting a decrease (2016: 22% vs. 2015: 24%).

Interestingly, unlike previous years, the number of associations who reported that the size of their membership had remained the same has remained constant.

MEMBERSHIP CHANGE IN PAST YEAR				
	Total (n = 828)	Individual (n = 394)	Trade (n = 208)	Combination (n = 212)
Increased	49%	51%	48%	48%
Decreased	22%	24%	19%	22%
Remained the same	27%	24%	33%	28%
Not sure	1%	1%	1%	2%

Overall, about half of all associations report that their membership numbers have increased over the past year. This represents a slight increase from last year's findings (49% in 2016 vs. 46% in 2015).

Fewer than one-quarter of associations are reporting losses in membership over the past year (22%), a slight drop compared to findings from 2015 (24%).

Furthermore, a higher percentage of both individual member and combination organizations saw increases in membership compared to the previous year (51% in 2016 vs. 47% in 2015 for IMO; 48% in 2016 vs. 43% in 2015 for Combination).

The largest individual member organizations (20,000 or more members) are most likely to have seen increases in the past year (58%), compared to 47% of individual member associations with fewer than 5,000 members.

A closer review of the results indicates that 57% of associations report increases of 1% to 5% over the past year. The median increase for all associations is 5%, and 84% of these associations have increased their membership up to 10%.

CHANGE IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 827)	Individual (n = 393)	Trade (n = 208)	Combination (n = 212)
Increased	51%	54%	48%	49%
Decreased	31%	33%	28%	29%
Remained the same	14%	10%	18%	16%
Not sure	5%	3%	6%	7%

The growth trend of the past five-year period continues as we find that:

- 51% show an increase in membership over the past five years, a slight increase from 49% reported in 2015.
- Similar to 2014 and 2015, a little less than one-third of associations (30%) show a decrease in their membership over the past five years.
- At least three in ten individual member and trade associations report increases of 11% to 25%, while only 22% of combination associations report increases at this level.
- 14% report no change in the number of members, a decrease from the 16% reported in 2015.

KEY INDICATORS: Member Acquisition and Member Renewal

The primary components of membership growth for any association are member acquisition and member renewal. Review of these key indicators can quickly indicate the financial health of any association as well as provide guidance as to what changes, if any, are necessary.

New Member Acquisition

CHANGE IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 826)	Individual (n = 393)	Trade (n = 208)	Combination (n = 211)
Increased	53%	55%	49%	53%
Decreased	12%	12%	15%	10%
Remained the same	30%	27%	33%	31%
Not sure	5%	6%	3%	5%

There is an uptick of almost 10 percentage points in the number of associations reporting an increase in new members since the previous study (53% in 2016 vs. 44% in 2015), while the number of associations reporting a decrease in new members is slightly lower than 2015 (12% in 2016 vs. 15% in 2015), as is the number of associations reporting no change in membership (30% in 2016 vs. 34% in 2015).

More than half of all associations report increases in new member acquisition over the past year (53%). Individual member and combination associations are more likely than trade associations to report increases in new members (IMO: 55% vs. Trade: 49%). One-third of trade associations indicate their new member acquisition numbers have remained unchanged (33%).

Similar to findings from previous years, the top methods for acquiring new domestic members include word-of-mouth recommendations and email. Overall, promotion to or at an association's conferences or trade shows is the third most common method for acquiring new domestic members.

However, for individual member organizations, direct mail is the third most common vehicle for acquiring new members (35%), while trade associations rely on personal sales calls (48%). These findings mirror those from the 2015 research.

The most effective methods for recruiting international members are through word-of-mouth recommendations, email, and by promotion of or at an association conference or trade show. These are the top methods regardless of the type of association. Also, individual member and combination associations also indicate that chapters are an effective tool for acquiring new international members.

When asked about the reasons members join, the most common reason cited by association executives is networking with others in their respective field (55%). This is similar to the 2015 findings.

An equal percentage of association professionals believe members join to learn best practices or for continuing education (25% each). A preponderance of executives from both individual member and combination associations echo the overall findings.

An interesting change compared to 2015, continuing education and conferences and trade shows are currently strong membership drivers for combination associations.

Membership Renewal

CHANGE IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 822)	Individual (n = 393)	Trade (n = 205)	Combination (n = 210)
Increased	24%	24%	25%	23%
Decreased	26%	31%	19%	25%
Remained the same	44%	39%	53%	46%
Not sure	6%	7%	3%	6%

Most associations report that their renewal rate has remained unchanged over the past year. This is consistent with findings from 2015 (44% in 2016 vs. 45% in 2015).

Digging further into the data, we found that more than half of trade associations indicate that renewals have remained the same (53%).

OVERALL MEMBERSHIP RENEWAL RATE				
	Total (n = 726)	Individual (n = 341)	Trade (n = 191)	Combination (n = 183)
Mean	82%	80%	87%	80%
Median	85%	82%	90%	83%

The majority of all associations report increases in renewals of up to 5% (71%).

Further analysis indicates that associations with renewal rates at or above 90% are significantly more likely to have new member renewals at 80% or higher.

Associations with renewal rates of 80% or higher are significantly more likely to offer installment renewal plans (49% vs. 30%), renewal bill-me plans (21% vs. 12%), and automatic annual EFT renewals (16% vs. 9%).

Associations with renewal rates less than 80% are significantly more likely to offer multi-year renewals (47% vs. 23%) and automatic annual credit card renewals (37% vs. 26%).

While some associations may consider elimination of a “grace period” when designing their renewal strategy, it is interesting to note that most associations offer a grace period and only 16% overall do not. Furthermore, 70% of associations offer a grace period of 1 to 3 months, with the most popular grace period being 2 to 3 months at 49%.

CHALLENGES TO MEMBERSHIP GROWTH

TOP THREE BIGGEST <u>INTERNAL</u> CHALLENGES TO GROWING MEMBERSHIP				
	Total (n = 728)	Individual (n = 342)	Trade (n = 190)	Combination (n = 183)
Difficulty in communicating value or benefits	31%	30%	30%	32%
Insufficient staff	29%	26%	34%	28%
Membership too diverse; difficulty meeting needs of different segments	24%	24%	24%	23%
Difficulty in proving ROI	23%	17%	35%	21%

The primary internal challenges to growing membership are difficulty in communicating value or benefits, insufficient staff, and difficulty meeting members' needs due to a broad membership base.

This includes associations with 80% or higher renewal rates where the primary challenges to growing membership are difficulty in communicating the value of benefits (30%) and insufficient staff (30%). About a quarter of these associations also struggle with diverse memberships (i.e., difficulty meeting the needs of different segments), proving ROI, and identifying/contacting prospects.

Almost a third of individual member associations with 20,000 or more members have difficulty attracting and/or maintaining young members (32%).

TOP TWO BIGGEST <u>EXTERNAL</u> CHALLENGES TO GROWING MEMBERSHIP				
	Total (n = 723)	Individual (n = 339)	Trade (n = 189)	Combination (n = 182)
Competitive association(s) or sources of information	34%	40%	30%	29%
Economy/cost of membership	31%	28%	37%	29%
Perception of the association and/or its culture (i.e., old boy's network, not specialized enough, etc.)	26%	27%	26%	26%
Lack of brand awareness	24%	24%	19%	32%
Declining member/employer budgets	22%	23%	13%	27%
Industry consolidation/industry shrinkage	18%	10%	34%	15%

Competitive association(s) or sources of information (34%) and economy/cost of membership (31%) are the biggest external challenges to growing membership.

Associations that report a decrease in new members (38%) are more likely to report the biggest hurdle to growing membership is the perception of the association and/or its culture (i.e., old boy's network, not specialized enough, etc.).

Associations with lower operating budgets (less than \$5 million) are more likely to struggle with lack of brand awareness.

TOP REASONS FOR NOT RENEWING MEMBERSHIP				
	Total (n = 748)	Individual (n = 352)	Trade (n = 194)	Combination (n = 189)
Lack of engagement with the organization	33%	28%	40%	35%
Left the field, industry, or profession	30%	37%	17%	31%
Could not justify membership costs with any significant ROI	29%	26%	43%	21%
Budget cuts/economic hardship of company	28%	17%	50%	26%
Employer won't pay or stopped paying dues	26%	34%	4%	33%
Lack of value	21%	19%	20%	25%

Member engagement in association sponsored/sourced services and events is considered key to an association's sustenance and ultimate growth. Increasing member engagement begins with the process of *onboarding* the new member. The top two methods of communication have remained constant since 2010.

COMMUNICATION METHODS TO ONBOARD NEW MEMBERS				
	Total (n = 800)	Individual (n = 375)	Trade (n = 204)	Combination (n = 207)
Email welcome	80%	79%	80%	80%
Mailed welcome kit	50%	48%	56%	48%
Membership card or certificate	46%	53%	32%	47%
Invite to use members-only website sections	37%	33%	48%	35%

When asked about continued engagement by members in association activities, 76% of associations saw an increase in participation in that organization's public social network, followed by 63% experiencing a rise in both participation in a young professional program and a private social network.

76% of associations with increasing renewal rates indicate increased participation in their private social networks.

The least popular area of engagement has been book or directory purchases, with 20% of all associations reporting a decline. This decrease ranges from only 11% of all trade associations to 28% of all combination organizations.

76% of individual member and combination associations and 78% of trade associations report an increase in participation in public social networks.

WORDS OF WISDOM

In keeping with our desire to make this document a “practical” resource for the association community, we asked respondents to answer 11 open-ended questions:

1. In your professional opinion, how do you think associations will change or evolve to maintain their relevance over the next decade?
2. In your own words, what are the most important or successful lessons you have learned in the area of membership marketing?
3. If there was one hurdle you could remove to make your association run smoother, what would it be?
4. With regard to your association, what keeps you up at night?
5. If you could freely say anything to your members, what would you say?
6. What are your organization’s marketing weaknesses?
7. What are your organization’s marketing strengths?
8. Describe how you have used social media for your association in a very successful manner.
9. Describe an engagement or retention strategy that your association has employed that has been very successful, and/or from which you learned something valuable.
10. How do you measure the effectiveness of your engagement strategy?
11. Describe an acquisition or recruitment strategy that your association has employed that has been very successful, and/or from which you learned something valuable.

Of the over 4,000 responses, we’ve noted some of the more interesting for your review throughout the report.

INTRODUCTION

SURVEY OBJECTIVE

For eight consecutive years, MGI has conducted its annual Membership Marketing Benchmarking Survey. The report highlights strategies and tactics that membership organizations use to recruit new members, retain current members, and reinstate lapsed members.

In an effort to maintain relevancy and interest, we review the contents of the previous survey each year and evaluate the usefulness and success of questions to determine which will be removed and which new questions will be added. As in previous years, we also include suggested questions from previous survey takers to ensure that the survey remains pertinent and on-trend.

METHODOLOGY

The 2016 Membership Marketing Benchmarking Survey was conducted online. It launched on January 11, 2016, and remained open until February 19, 2016. Email invitations were sent to association executives who subscribe to MGI's monthly newsletter, the *Tipster*; had downloaded the *2015 Membership Marketing Benchmarking Report*, or had completed the survey the previous year. A link to the survey was also available through the MGI website. Finally, individuals who requested to participate, but were not included on one of the above mentioned lists, were sent a link.

RESPONSE RATE

Email invitations were sent to 15,813 individuals. Of those, 957 emails bounced, bringing the total to 14,856. A total of 792 executives completed the survey and 140 partially completed the survey, bringing the total responses to 932. The resulting response rate is approximately 6%.

ANALYSES

As is our practice, we include only one response per association so as not to duplicate answers in our dataset. If more than one person from an association completed the survey, we used the data that was most complete, and/or the data from the respondents whose responsibilities most closely relate to membership marketing. We require that an association or company name be provided for this reason. If no association or company name is included, the data is not used. Net duplicate association submissions, a total of 828 unique associations participated in the current study.

REPORT LAYOUT

The data in this year's report will be presented similarly to the 2015 report. This year, all data will be segmented by type of association: Individual Membership Organization (IMO), Trade Association (Trade), or association with a combination of both types of membership (Combination). Additionally, a Total segment will be included for all charts and tables to show data relevant to the entire association arena. The total will, at times, not be equal to the sum of the types of associations, as some associations classified themselves as something other than the three main groups.

We are continuing our inclusion of the Best Practices Highlights which provide insights and recommendations shared by participants in the survey.

The sections included in this report are:

- Section 1 • ASSOCIATION STATISTICS
- Section 2 • MEMBER RECRUITMENT (ACQUISITION)
- Section 3 • MEMBER ENGAGEMENT
- Section 4 • MEMBER RENEWAL AND REINSTATEMENT (RETENTION)
- Section 5 • SOCIAL MEDIA
- Section 6 • CHALLENGES AND GOALS
- Section 7 • DUES AND MEMBERSHIP STRUCTURE
- Section 8 • MANAGING YOUR ASSOCIATION
- Section 9 • THE DEMOGRAPHICS OF YOUR ASSOCIATION
- Section 10 • WORDS OF WISDOM

How has your membership changed in the past ONE-YEAR period?

MEMBERSHIP CHANGE IN PAST YEAR				
	Total (n = 828)	Individual (n = 394)	Trade (n = 208)	Combination (n = 212)
Increased	49%	51%	48%	48%
Decreased	22%	24%	19%	22%
Remained the same	27%	24%	33%	28%
Not sure	1%	1%	1%	2%

- Overall, about half of all associations report that their membership numbers have increased over the past year. This represents a slight increase over the past year (49% in 2016 vs. 46% in 2015).
- Fewer than one-quarter of associations are reporting losses in membership over the past year (22%), a slight drop compared to findings from 2015 (24%).
- The largest individual member organizations (20,000 or more members) are most likely to have seen increases in the past year (58%), compared to 47% of individual member associations with fewer than 5,000 members.
- Furthermore, a higher percentage of both individual member and combination organizations saw increases in membership compared to the previous year (51% in 2016 vs. 47% in 2015 for IMO; 48% in 2016 vs. 43% in 2015 for Combination).
- 22% of all associations report declines in membership over the past year, with a higher percentage of individual membership organizations showing declines (24%).
- One-third of trade associations report their membership numbers have not changed over the past year.
- Associations reporting new member renewals at less than 80% are significantly more likely to report overall membership declines in the past year.
- Not surprisingly, associations reporting increases in membership over the past five years, increases in new members, and increases in renewals are significantly more likely to report increases in membership over the past year.

PERCENTAGE INCREASED IN MEMBERSHIP OVER PAST YEAR				
	Total (n = 390)	Individual (n = 192)	Trade (n = 93)	Combination (n = 101)
Mean % Increased*	11%	13%	10%	8%
Median % Increased	5%	5%	6%	5%
Increased 1% to 5%	57%	61%	52%	55%
Increased 6% to 10%	27%	23%	34%	28%
Increased 11% to 25%	13%	15%	9%	14%
Increased 26% to 50%	3%	2%	3%	3%
Increased more than 50%	1%	1%	2%	1%
*Means are influenced by high and low numbers in the data set.				

- 57% of associations report increases of 1% to 5% over the past year. The median increase for all associations is 5%.
- Among associations with an increase in membership over the past year, 84% have increased their membership by as much as 10%.
- Individual member associations are more likely to see increases of 1% to 5% compared to trade and combination associations.
- About one-third of trade associations (34%) report membership increases of 6% to 10%.
- 18% of both individual member and combination organizations saw increases in membership of more than 10%.

PERCENTAGE DECREASED IN MEMBERSHIP OVER PAST YEAR				
	Total (n = 176)	Individual (n = 93)	Trade (n = 38)	Combination (n = 43)
Mean % Decreased*	6%	6%	6%	7%
Median % Decreased	5%	5%	5%	4%
Decreased 1% to 5%	61%	59%	63%	63%
Decreased 6% to 10%	24%	28%	24%	19%
Decreased 11% to 25%	14%	13%	13%	16%
Decreased 26% to 50%	1%	-	-	2%
Decreased more than 50%	-	-	-	-
*Means are influenced by high and low numbers in the data set.				

- For those associations reporting declines in membership, 61% report declines of 1% to 5%. The median percent of membership lost over the past year is about 5%.
- Almost two-thirds of trade and combination associations report declines of up to 5% (63% each), while almost three in ten individual member associations report membership losses of 6% to 10% over the past year (28%).

Over the past FIVE YEARS, how has the total percentage of your membership changed?

CHANGE IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 827)	Individual (n = 393)	Trade (n = 208)	Combination (n = 212)
Increased	51%	54%	48%	49%
Decreased	31%	33%	28%	29%
Remained the same	14%	10%	18%	16%
Not sure	5%	3%	6%	7%

- Just over half of all associations report that their membership has increased over the past five years (51%). This is especially true of individual member organizations (54%).
- However, one-third of individual member organizations indicate that their five-year membership numbers have decreased overall (33%).
- Associations with new member renewals at 80% or higher are significantly more likely to report increases in overall membership over the past five years. Similarly, associations reporting increases over the past year and increases in new members are significantly more likely to have increases in membership over the past five years.
- Over six in ten individual member organizations with 20,000 members or more report increases over the past five years (62%).

PERCENTAGE INCREASED IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 387)	Individual (n = 193)	Trade (n = 92)	Combination (n = 95)
Mean % Increased*	29%	27%	32%	31%
Median % Increased	15%	14%	15%	15%
Increased 1% to 5%	21%	21%	24%	19%
Increased 6% to 10%	23%	22%	22%	27%
Increased 11% to 25%	31%	35%	30%	22%
Increased 26% to 50%	16%	16%	13%	18%
Increased more than 50%	10%	7%	11%	14%

*Means are influenced by high and low numbers in the data set.

- The median increase over the past five years is 15%, the same as findings from 2015. 35% of associations reporting overall increases in membership over the past five years most commonly show increases of 11% to 25%.
- At least three in ten individual member and trade associations report increases of 11% to 25%, while only 22% of combination associations report increases at this level.
- However, about one-third of combination associations report increases of more than 25% in the past five years (32%).

PERCENTAGE DECREASED IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 234)	Individual (n = 120)	Trade (n = 53)	Combination (n = 59)
Mean % Decreased*	11%	12%	10%	12%
Median % Decreased	10%	10%	10%	10%
Decreased 1% to 5%	33%	33%	38%	29%
Decreased 6% to 10%	33%	28%	36%	39%
Decreased 11% to 25%	27%	33%	23%	20%
Decreased 26% to 50%	7%	6%	4%	12%
Decreased more than 50%	1%	2%	-	-
*Means are influenced by high and low numbers in the data set.				

- Two-thirds of all associations indicate declines in membership of 10% or less (65%). The median percentage of membership decline over the past five years is about 10%, on par with results from 2015.
- However, 38% of trade associations are most likely to report declines of up to 5%, while almost four in ten combination associations (39%) report declines of 6% to 10%.
- One-third of individual membership associations report declines of up to 5% or declines of 11% to 25%.

In the past ONE YEAR, how has your NEW member acquisition changed?

CHANGE IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 826)	Individual (n = 393)	Trade (n = 208)	Combination (n = 211)
Increased	53%	55%	49%	53%
Decreased	12%	12%	15%	10%
Remained the same	30%	27%	33%	31%
Not sure	5%	6%	3%	5%

- More than half of all associations report increases in new member acquisition over the past year (53%). Individual member and combination associations are more likely than trade associations to report increases in new members (IMO: 55% and Combination: 53% vs. Trade: 49%).
- One-third of trade associations indicate their new member acquisition numbers have remained unchanged (33%).
- There is an uptick of almost 10 percentage points in the number of associations reporting an increase in new members since the previous study (53% in 2016 vs. 44% in 2015), while the number of associations reporting a decrease in new members is slightly lower than 2015 (12% in 2016 vs. 15% in 2015), as is the number of associations reporting no change in membership (30% in 2016 vs. 34% in 2015).

- Associations reporting increases in membership over the past year, increases in membership over the past five years, and increases in their renewal rates are significantly more likely to report increases in new members over the past year.
- Trade organizations with at least 500 members are most likely to indicate they have seen increases in new members (52%) compared to trade associations with fewer members.

PERCENTAGE INCREASED IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 390)	Individual (n = 189)	Trade (n = 96)	Combination (n = 101)
Mean % Increased*	20%	23%	21%	15%
Median % Increased	7%	6%	8%	6%
Increased 1% to 5%	45%	44%	46%	46%
Increased 6% to 10%	25%	27%	24%	24%
Increased 11% to 25%	18%	20%	15%	17%
Increased 26% to 50%	6%	6%	8%	5%
Increased more than 50%	6%	3%	7%	9%
*Means are influenced by high and low numbers in the data set.				

- For associations reporting increases in new members, the median percentage increase is 7%.
- 45% of associations report increases of about 1% to 5% in new members.
- Individual member organizations are slightly more likely to report increases of 11% to 25%, while trade and combination associations are more likely to report increases of 26% or more.
- 78% of associations with membership in excess of 20,000 indicate an increase in new member acquisition of up to 10%.

PERCENTAGE DECREASED IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 94)	Individual (n = 46)	Trade (n = 27)	Combination (n = 20)
Mean % Decreased*	11%	10%	12%	13%
Median % Decreased	7%	5%	10%	8%
Decreased 1% to 5%	43%	52%	26%	40%
Decreased 6% to 10%	18%	17%	19%	20%
Decreased 11% to 25%	23%	22%	26%	25%
Decreased 26% to 50%	15%	9%	26%	15%
Decreased more than 50%	1%	-	4%	-
*Means are influenced by high and low numbers in the data set.				

- Similar to increases in new members, the median decline in new members is 7%.
- Associations are most likely to report declines of 1% to 5%.
- However, trade associations are equally likely to report drops of 1% to 5% as they are to report declines of 11% to 25% or 26% to 50% (26% each).

In the past ONE YEAR, how has your member RENEWAL rate changed?

CHANGE IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 822)	Individual (n = 393)	Trade (n = 205)	Combination (n = 210)
Increased	24%	24%	25%	23%
Decreased	26%	31%	19%	25%
Remained the same	44%	39%	53%	46%
Not sure	6%	7%	3%	6%

- Most associations report that their renewal rate has remained unchanged over the past year. This is consistent with findings from 2015 (44% in 2016 vs. 45% in 2015).
- More than half of trade associations indicate that renewals have remained the same (53%).
- About one-quarter of all types of associations report increases in member renewals, while three in ten individual member associations indicate their member renewals have decreased (31%).
- Associations reporting increases in overall membership over the past year, and the past five years, as well as increases in new members are significantly more likely to indicate their renewals over the past year have increased.

PERCENTAGE INCREASED IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 183)	Individual (n = 84)	Trade (n = 51)	Combination (n = 47)
Mean % Increased*	10%	8%	14%	9%
Median % Increased	3%	3%	5%	3%
Increased 1% to 5%	71%	69%	65%	81%
Increased 6% to 10%	14%	18%	16%	6%
Increased 11% to 25%	7%	8%	6%	6%
Increased 26% to 50%	1%	-	4%	-
Increased more than 50%	7%	5%	10%	6%

*Means are influenced by high or low numbers in the data set.

- For associations reporting increases in renewal rates over the past year, the median percentage of increase is about 3%.
- The majority of all associations report increases in renewals of up to 5% (71%).

PERCENTAGE DECREASED IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 197)	Individual (n = 111)	Trade (n = 35)	Combination (n = 49)
Mean % Decreased*	7%	7%	7%	9%
Median % Decreased	4%	4%	4%	5%
Decreased 1% to 5%	66%	70%	66%	55%
Decreased 6% to 10%	19%	21%	11%	22%
Decreased 11% to 25%	11%	6%	17%	18%
Decreased 26% to 50%	2%	1%	3%	2%
Decreased more than 50%	2%	2%	3%	2%

*Means are influenced by high or low numbers in the data set.

- For the associations reporting declines in member renewals, the median percentage decrease is about 4%.
- Two-thirds of all associations report that their percentage decrease in member renewals is 5% or less.

What is your overall membership renewal rate?

OVERALL MEMBERSHIP RENEWAL RATE				
	Total (n = 726)	Individual (n = 341)	Trade (n = 191)	Combination (n = 183)
Mean	82%	80%	87%	80%
Median	85%	82%	90%	83%

- Two-thirds of associations report renewal rates of 80% or higher (68%). The median membership renewal rate for all associations is about 85%.
- The median renewal rate for trade associations is about 90%.
- For individual member organizations, the median renewal rate declines as the number of paid members increases.
- Associations with renewal rates at or above 80% are significantly more likely to show increases in their overall membership in the past year, and are significantly more likely to report new member renewals at or above 60%.
- Furthermore, associations with renewal rates at or above 90% are significantly more likely to have new member renewals at 80% or higher.

What is your renewal rate for first-year members?

RENEWAL RATE FOR FIRST-YEAR MEMBERS				
	Total (n = 505)	Individual (n = 224)	Trade (n = 150)	Combination (n = 122)
Mean	70%	63%	81%	70%
Median	74%	62%	85%	75%

- The median overall renewal rate for first-year members is 74%.
- The median renewal rate for new members is highest for trade organizations (85%) and lowest for individual member organizations (62%).
- Combination associations show an increase in first-year member renewals compared to the previous study (68% in 2015 vs. 75% in 2016).
- Associations with new member renewal rates at or above 80% are significantly more likely to report increases in membership over the past year and over the past five years, as well as increases in new member acquisitions.

What do you estimate is the percentage of your current market penetration?

PERCENTAGE OF CURRENT MARKET PENETRATION				
	Total (n = 582)	Individual (n = 268)	Trade (n = 161)	Combination (n = 143)
Mean	43%	42%	45%	44%
Median	40%	40%	40%	41%

- The median market penetration for all types of associations is 40%. Two-thirds of associations report market penetration below 60% (67%).
- Combination associations show increases in their median market penetration from the previous year (36% in 2015 vs. 41% in 2016), while individual member organizations show declines in market penetration (45% in 2015 vs. 40% in 2016).
- Associations with a market penetration from 50% to 60% are significantly more likely to have an overall renewal rate under 80%, while those with a market penetration of 80% or higher are significantly more likely to report renewal rates at or above 80% and new member renewals above 60%.

What do you estimate is the average age of your members?

AVERAGE AGE OF MEMBERS				
	Total (n = 807)	Individual (n = 387)	Trade (n = 197)	Combination (n = 211)
18-24	<1%	<1%	-	-
25-34	1%	1%	-	1%
35-44	17%	16%	13%	21%
45-54	57%	57%	59%	54%
55-64	23%	21%	28%	22%
65-74	2%	4%	1%	1%
75 and older	<1%	1%	-	-

- A majority of associations consider the average age of their members to be between 45 and 54 years old.
- Compared to individual member and combination organizations, a higher percentage of trade association executives believe the average age of their members to be between 55 and 64.

Which recruitment channels get your organization the most new domestic members? You may select up to FIVE answer choices.

CHANNELS THAT GET MOST NEW DOMESTIC MEMBERS				
	Total (n = 823)	Individual (n = 393)	Trade (n = 204)	Combination (n = 212)
Word-of-mouth recommendations	69%	65%	75%	72%
Email	56%	58%	50%	56%
Promotion to/at your own conferences/trade shows	32%	30%	36%	34%
Direct mail	30%	35%	27%	25%
Cross-sell to non-members who buy your products or attend your conferences	29%	28%	32%	32%
Association-sponsored events	28%	28%	30%	26%
Local events/meetings	27%	28%	22%	29%
Digital Marketing	22%	26%	16%	23%
Chapters	22%	28%	7%	25%
Personal sales calls	21%	7%	48%	22%
Exhibiting at other conferences	18%	16%	21%	20%
Advertising in your own publications	12%	15%	6%	12%
Free membership offered with a non-member meeting registration	11%	12%	4%	17%
Accreditation promotion	8%	8%	4%	9%
Public relations	7%	7%	6%	7%
Content marketing (white papers)	7%	5%	10%	6%
Advertising in outside publications	4%	5%	4%	2%
Telemarketing	4%	4%	5%	2%
Radio or TV	1%	1%	-	1%
Other	9%	12%	7%	6%

- Similar to findings from previous years, the top methods for acquiring new domestic members include word-of-mouth recommendations and email. Overall, promotion to or at an association's conferences or trade shows is the third most common method for acquiring new domestic members.
- However, for individual member organizations, direct mail is the third most common vehicle for acquiring new members (35%), while trade associations rely on personal sales calls (48%). These findings mirror those from the 2015 research.
- Associations reporting increases in their overall membership in the past year, and those with new member renewals of 80% or higher are significantly more likely to indicate that word-of-mouth marketing is one of the most effective methods for obtaining new domestic members.
- Individual member organizations with more than 5,000 members, trade associations with more than 500 members, and organizations with an operating budget over \$1 million are more likely to report that direct mail is one of the most effective vehicles for acquiring new members.
- Individual member organizations with up to 5,000 members are significantly more likely to report that promotion of their organization at their conferences is a more effective recruitment channel, compared to larger associations.

Domestic recruitment, cont'd.

- Larger individual member organizations (over 5,000 members) and trade associations with over 500 members are significantly more likely to believe that direct mail is one of the most effective recruitment channels. Smaller individual member organizations (up to 1,000 members) and trade associations (up to 100 members) consider personal sales calls to be significantly more effective compared to their larger organization counterparts.

You indicated that you use DIGITAL marketing recruitment tools. Which of the following provide the most new domestic members? Please select up to TWO responses.

DIGITAL MARKETING TOOLS THAT GET MOST NEW DOMESTIC MEMBERS				
	Total (n = 177)	Individual (n = 99)	Trade (n = 32)	Combination (n = 44)
Association-sponsored social networking websites	63%	60%	72%	66%
Search engines (organic)	35%	32%	38%	39%
Facebook paid advertising	20%	26%	9%	14%
Search engine ads (pay-per-click)	15%	14%	19%	14%
Paid banners on other websites	14%	12%	13%	16%
Lead generation content marketing (white papers)	14%	12%	13%	18%
LinkedIn paid advertising	9%	10%	13%	5%

- For all associations, the most effective digital recruitment tools include association-sponsored social networking websites and search engines using organic search methods.
- Association-sponsored social networking seems to be most effective for trade and combination associations compared to individual member organizations.
- Individual member organizations are more likely to indicate that paid advertising on Facebook is an effective digital tool compared to trade or combination associations.
- Organizations with renewal rates of 80% or higher are significantly more likely to consider association-sponsored social networking sites to be an effective recruitment tool (72% vs. 46%).
- Additionally, the data show that as new member renewals increase, the likelihood of using association-sponsored social networking sites also increases (72% for associations with 80% or more in new member renewals compared to 49% for associations with less than 60% in new member renewals and 58% for associations with 60% to 79% in new member renewals).
- Associations with renewals of less than 80% are more likely to use paid Facebook advertising (29% vs. 14%) and pay-per-click search engine ads (30% vs. 6%).

Which recruitment marketing channels get your organization the most new international members?

You may select up to FIVE answer choices.

CHANNELS THAT GET MOST NEW INTERNATIONAL MEMBERS				
	Total (n = 648)	Individual (n = 314)	Trade (n = 151)	Combination (n = 170)
Word-of-mouth recommendations	44%	42%	47%	45%
Email	31%	33%	31%	29%
Promotion to/at your own conferences/trade shows	21%	19%	23%	22%
Exhibiting at other conferences	17%	17%	19%	14%
Cross-sell to non-members who buy your products or attend your conferences	15%	14%	16%	18%
Association-sponsored events	15%	16%	15%	14%
Chapters	11%	12%	3%	17%
Digital Marketing	10%	12%	9%	10%
Local events/meetings	9%	10%	7%	11%
Free membership offered with a non-member meeting registration	7%	8%	3%	12%
Advertising in your own publications	7%	8%	5%	9%
Direct mail	6%	7%	3%	7%
Accreditation promotion	5%	6%	5%	5%
Promotional incentives	4%	5%	3%	4%
Personal sales calls	4%	1%	9%	5%
Public relations	3%	3%	3%	3%
Advertising in outside publications	3%	3%	3%	2%
Telemarketing	1%	1%	-	1%
Radio or TV	<1%	-	-	1%
Other	30%	30%	29%	28%

- Similar to acquiring new domestic members, the most effective methods for recruiting international members is through word-of-mouth recommendations, email, and by promotion of or at an association conference or trade show. These are the top methods regardless of the type of association.
- Individual member and combination associations also indicate that chapters are an effective tool for acquiring new international members.
- Combination associations are more likely than other types of organizations to feel that a free membership with a non-member meeting registration is also an effective channel for obtaining new international members.
- Individual member organizations with more than 5,000 members are more likely to consider their chapters to be effective channels for international recruitment compared to smaller organizations.

You indicated that you use DIGITAL marketing recruitment tools. Which of the following provide the most new international members? Please select up to TWO responses.

DIGITAL MARKETING TOOLS THAT GET MOST NEW INTERNATIONAL MEMBERS				
	Total (n = 65)	Individual (n = 35)	Trade (n = 13)	Combination (n = 17)
Association-sponsored social networking websites	51%	54%	46%	47%
Search engines (organic)	43%	40%	39%	53%
Lead generation content marketing (white papers)	20%	17%	31%	18%
Paid banners on other websites	15%	17%	23%	6%
Facebook paid advertising	15%	14%	15%	18%
LinkedIn paid advertising	14%	17%	8%	12%
Search engine ads (pay-per-click)	12%	11%	15%	12%

- Comparable to domestic recruitment, the most effective digital tools for international member acquisition include association-sponsored social networking websites (51%) and search engines using organic searches (43%).
- Associations with renewal rates of 80% or higher are more likely to rate association-sponsored social networking sites as highly effective for international recruitment (60% vs. 28%).

What do you believe are the TOP THREE reasons members JOIN your organization?

TOP REASONS MEMBERS JOIN ORGANIZATION				
	Total (n = 811)	Individual (n = 384)	Trade (n = 204)	Combination (n = 209)
Networking with others in the field	55%	53%	59%	56%
Learning best practices in their profession	25%	24%	28%	25%
Continuing education	25%	33%	15%	23%
Access to specialized and/or current information	24%	21%	32%	20%
Advocacy	21%	15%	34%	16%
To support the mission of the association	19%	20%	16%	19%
Conferences/trade shows	18%	14%	23%	23%
Discounts on product or meeting purchases	16%	18%	12%	17%
Prestige of belonging to the association	15%	17%	10%	14%
Association publications	13%	18%	5%	12%
Advancing their position	10%	12%	6%	11%
Access to industry thought leaders	10%	6%	14%	14%
Accreditation or certification	9%	10%	4%	12%
Members-only education	7%	8%	7%	7%
Affinity programs	5%	4%	7%	3%
Required to gain or maintain professional certification	4%	6%	1%	5%
Access to industry benchmark studies	3%	<1%	8%	3%
Downloadable content	3%	3%	2%	3%
Job board	2%	2%	-	2%
Not sure	<1%	<1%	-	1%
Other	9%	8%	11%	8%

- The most common reason association executives believe members join is to network with others in their respective field (55%). This is similar to the 2015 findings.
- An equal percentage of association professionals believe members join to learn best practices or for continuing education (25% each). A preponderance of executives from both individual member and combination associations echo the overall findings.
- Continuing education and conferences and trade shows are currently strong membership drivers for combination associations, an interesting change compared to 2015.
- For trade associations, the top reasons for joining the association include networking, but also include access to specialized and/or current information (32%), and to support the advocacy done on behalf of the industry (34%).
- Associations reporting renewal rates at or above 80% are significantly more likely to believe that members join for the available continuing education (27% vs. 20%).

Reasons members join, cont'd.

- Networking, however, seems to be less of a membership driver for the largest individual member organizations (over 20,000 members: 40%) and trade associations (over 500 members: 50%).
- Support of the association's mission is a leading membership driver for the smallest trade organizations (up to 100 members: 30%), compared to 20% or fewer of the larger trade organizations (over 100 members).

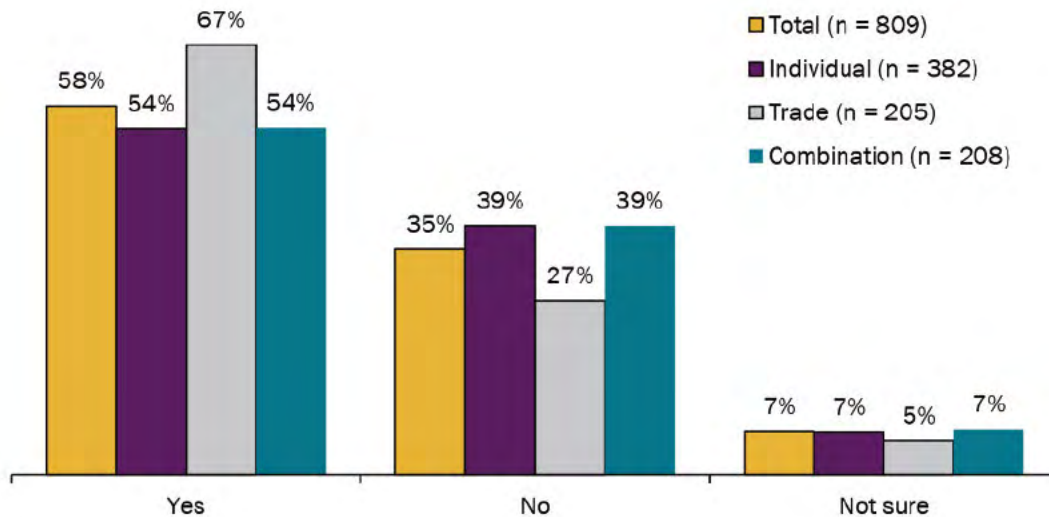
BEST PRACTICES | RECRUITMENT

Describe an acquisition or recruitment strategy that your association has employed that has been very successful, and/or from which you learned something valuable. Provide details so that others may learn from your experience.

-
- Created a new model wherein employers that join can offer certification testing to employed applicants with no out-of-pocket fee to register for the exam, and no exam fee if the applicant fails their exam. Employers are invoiced for passing exam fees only. (Combination)
-
- Targeting content to specific groups within the membership to ensure only relevant material is surfaced to a particular group. We experienced cut-through issues with juniors. We created dedicated content just for our first year juniors, very specific to their career stage. This had better traction than previous general marketing materials and supported by brand ambassadors had good traction. (IMO)
-
- Upgrade campaign—we send a direct mail invitation to our current annual members asking them to upgrade to a life membership. The format is different and we give them a loyalty discount. This performs very well and then we no longer need to retain them. (IMO)
-
- Honorarium Program—targets high level end users in the field and offers a “honorarium” which covers one year's membership dues and registration for the two annual conferences. It also covers travel and accommodations to the first conference. This brings people in the door to experience the association. (Combination)
-
- We recently created a chapter recruitment kit to better educate our chapters on their importance in the recruitment of new members. It was extremely fruitful on educating our current members. It is too soon to see how it affects membership acceptance rates but hope to have that data soon. We will be creating another kit for retention that we hope will continue to keep the communication and education channels open between international and local levels. (IMO)
-
- The Kudos Recognition Program was instituted two years ago to acknowledge members (especially Board Members) who referred new members to the Association. The program was recommended by our board members with the “payoff” for referrals simply being recognition—no monetary reward or free item. The results have been lackluster to say the least. (Trade)
-

-
- Develop/deploy customized messages to showcase association's core services to industry segments (state, national, regional, product focused). Messages focus on current advocacy issues in their state/region, point out how national research also includes state, etc. Follow-up by members in same target groups. The effect is a message that appears to be developed exclusively for the prospect. Messages delivered primarily through email but can also include phone calls, web ads, tweets. (Combination)
-
- We used testimonials from our members in a campaign to highlight why they choose to be members in order to support our mission. We put the testimonials on a landing page and rotated them on our homepage and included them in email campaigns. It was our most effective campaign ever to acquire new members. We made it clear to members that we had a goal to acquire new members and raise money so the community helped to share the message locally. (Combination)
-
- Student membership recruitment, which builds pipeline to the profession and to membership, getting young professionals (young CPAs engaged and inspiring them to help recruit new members), building relationships at the employer level and now offering organizational memberships (rolling out slowly to be sure we get it right) in addition to individual memberships. (Combination)
-
- In 2015, we introduced a 'free year of dues' policy for new members who applied for membership on site at our annual conference. The funds for the free year of dues come from the registration fees: we transferred the difference between what they paid as nonmembers for registration and what they would have paid as members to their membership accounts to cover their membership dues, rather than giving them a refund. It was an overwhelming success for our annual conference, and we surpassed our onsite recruitment goal as well as any previous record set. In 2016, we are expanding the 'free year of dues for joining on site' promotion to all of the smaller meetings that our society hosts throughout the year as well. To date, we have doubled the amount of applications that we received at the two meetings that have taken place in 2016 in comparison to our 2015 results. (IMO)
-
- We hold a 4 day training seminar each year for newer professionals in the field. We are careful not to "sell" membership, but it is a fantastic way to showcase the depth and breadth of the work of our Association. At the end we simply say, "Your connection with us doesn't need to end here. We will waive the application fee if you wish to join." Eighty percent of attendees will become members within a year. It's like content marketing at its best. (IMO)
-
- Our recruitment campaign this year has been "Are you in?" It has featured testimonials about members and how they've benefited from membership in our organization. At our annual tradeshow, we hand out "I'm In" stickers for our members to wear, and "Are you in?" sign for them to sign; this year we'll be adding photos to that wall. It's been a very powerful message that seems to have resonated with the marketplace. However, it has taken a full year and a half to get traction. It's a campaign that started in August of 2014, and we're now really starting to see the fruits of it in our new member numbers. There is also an email component to the campaign. (Combination)
-
- We include the use of member photography and quotes/stories and use variable images and messaging in our direct response campaigns. We tie the variable image to the recipients' gender, ethnicity, practice area or geography based on our member photo/testimonial bank. The use of variable messaging/images has lifted our response over non variable campaigns between .5 to 1.5%. Also testing pricing and terms can lift response, as can focusing on "what's in it for me" messaging to like groups—in various practice settings as well as time in profession. (IMO)
-

Do you have a separate strategic initiative or tactical plan to increase engagement?



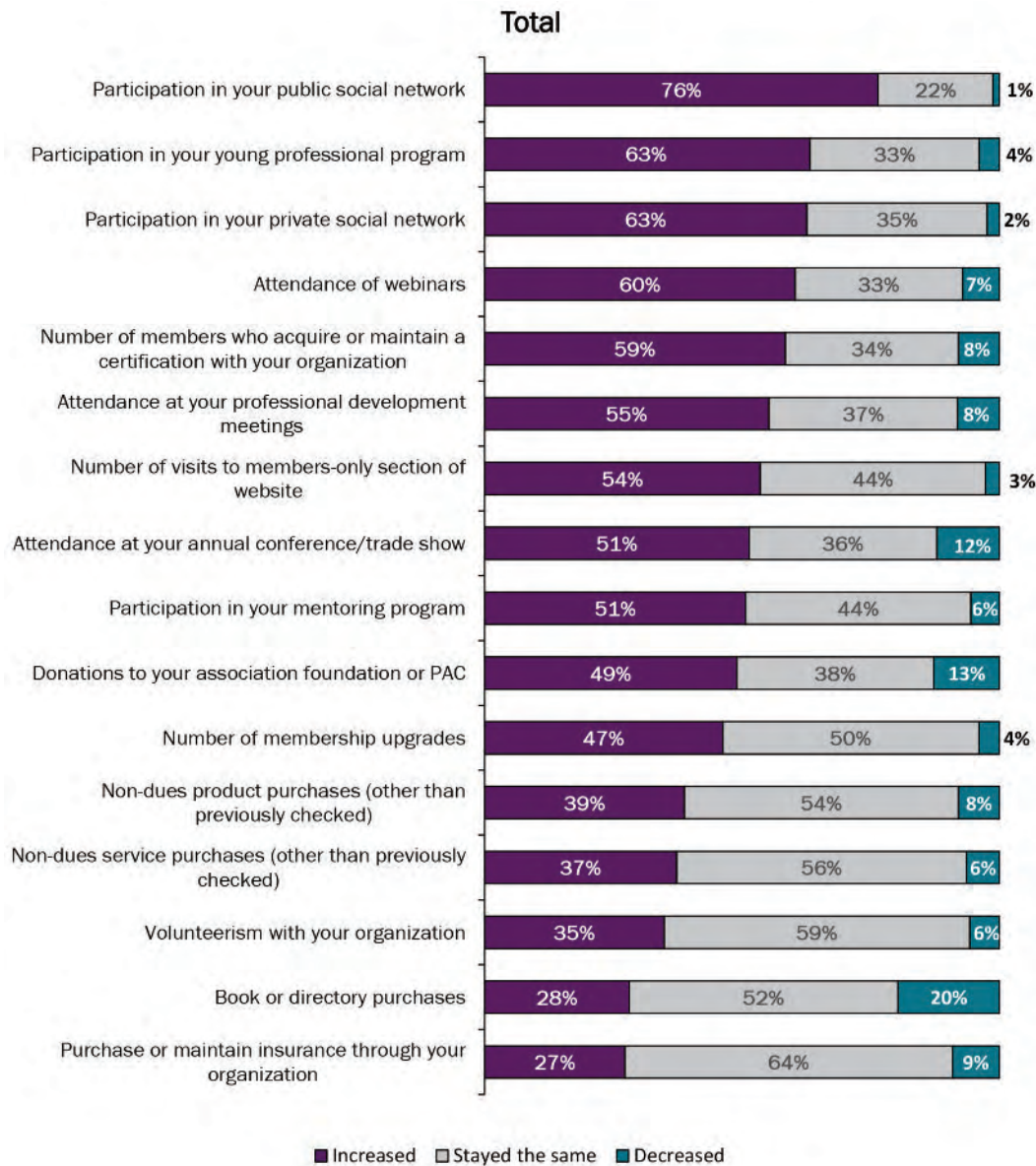
- The majority of associations currently have a separate strategic initiative or tactical plan for increasing engagement (58%).
- Trade associations are significantly more likely (67%) to have a strategic initiative or tactical plan, whereas only 54% of both individual member and combination associations do.
- Individual member associations with 20,000 or more members are significantly more likely (71%) than others to have a strategic initiative or tactical plan.
- 69% of trade associations with 500 or more members have a strategic initiative or tactical plan.
- 48% of individual member associations with 1,000 to 5,000 members have a strategic initiative or tactical plan.
- The percentage of associations that **do not** have a strategic initiative or tactical plan has increased from 2015 (24% in 2015 vs. 35% in 2016).
- 60% of those associations with a renewal rate of 80% or higher have a strategic initiative or tactical plan.

Which of the following communication methods do you use to help onboard or engage new members in the association? Check all that apply.

COMMUNICATION METHODS TO ONBOARD NEW MEMBERS				
	Total (n = 800)	Individual (n = 375)	Trade (n = 204)	Combination (n = 207)
Email welcome	80%	79%	80%	80%
Mailed welcome kit	50%	48%	56%	48%
Membership card or certificate	46%	53%	32%	47%
Invite to use members-only website sections	37%	33%	48%	35%
New-member introductory email series	32%	35%	25%	33%
Invite to follow/like association's social media (public or private) page(s)	29%	29%	27%	33%
Invitation to join the online community	26%	27%	24%	28%
Volunteer or staff welcome phone call	25%	16%	43%	25%
Invitation to volunteer	22%	27%	13%	22%
In-person new-member reception or orientation	21%	15%	33%	19%
Invite to chapter meeting	16%	17%	15%	16%
New-member survey	15%	21%	7%	12%
New-member newsletter (mail or electronic)	13%	13%	12%	14%
New-member gift (e.g., gift card, calendar, or notepad)	12%	12%	14%	10%
New-member webinars	12%	10%	19%	9%
Special new-member discounts on purchases	10%	9%	12%	9%
Telemarketing welcome phone call	8%	6%	11%	6%
Custom new-member renewal series	7%	9%	5%	4%
Invite to download mobile apps	4%	6%	3%	3%
Early or "at-birth" renewal	3%	4%	2%	3%
Text messaging specific to new members	1%	2%	1%	1%
No special communication	1%	2%	1%	2%
Other	7%	6%	12%	5%

- An email welcome is the most common method for welcoming new members to an association; its usage has also increased in recent years.
- Mailed welcome kits are a popular, but steadily declining method employed by many associations.
- 57% of associations with renewal rates of 80% or higher use this method, compared to 35% of all other associations with a lower renewal rate.
- Larger individual member associations do more to welcome new members. 83% of individual member associations with 5,000 or more members send out a welcome email, whereas only 72% of smaller individual member associations (1,000 members or fewer) do. Likewise, 53% of larger individual member associations mail out a welcome package compared to only 46% of smaller individual member associations.
- Among trade associations, 84% of larger trade associations (500 members or more) send a welcome email, whereas only 72% of smaller trade associations (100 or fewer members) do the same. 58% of larger trade associations mail out a welcome kit, but only 40% of smaller trade associations do the same. In both cases, these differences are significant.

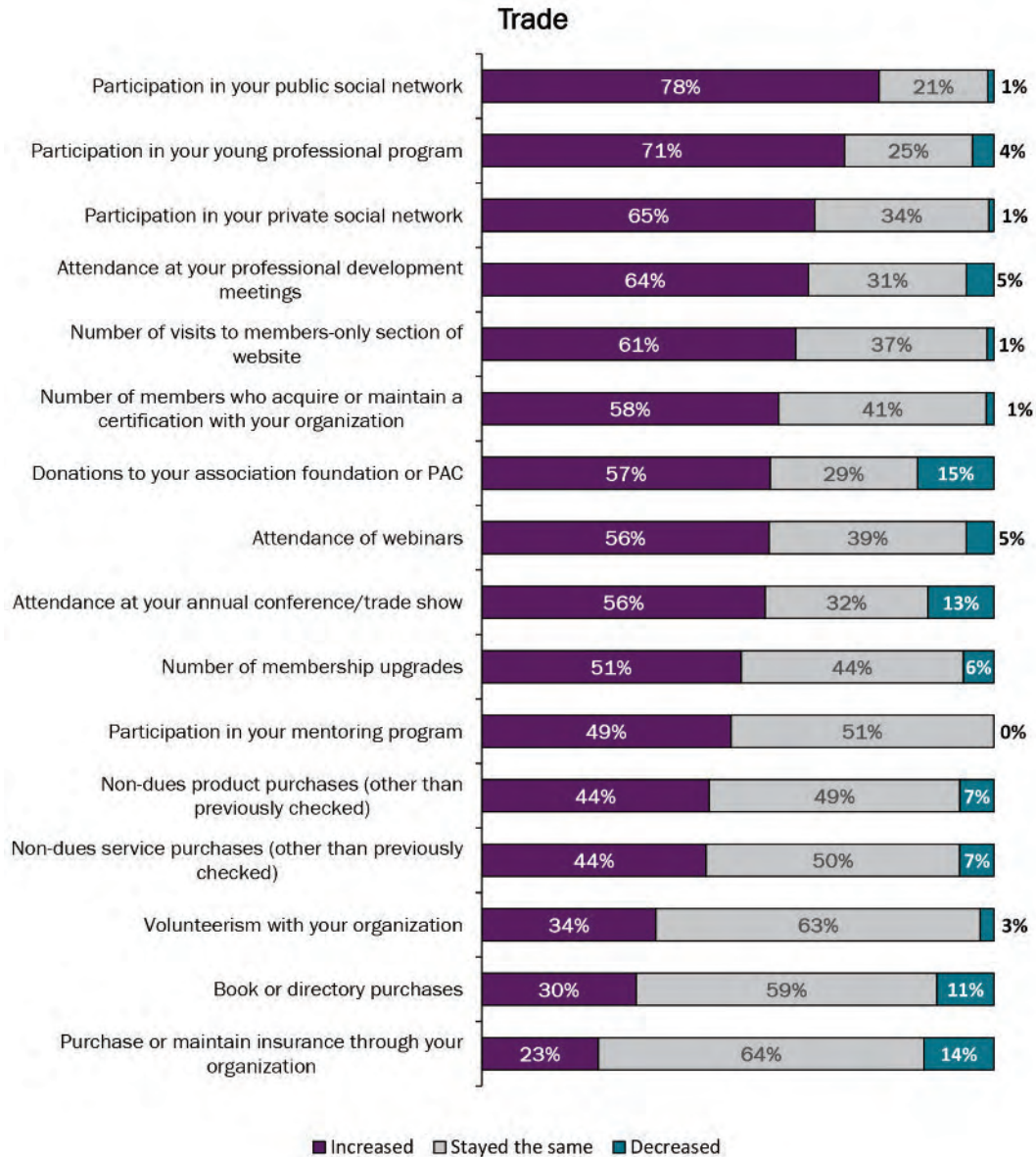
In the past fiscal year, how have member engagement and participation changed within each of the following areas?
Please indicate N/A if a particular item is not offered or not relevant to your association.



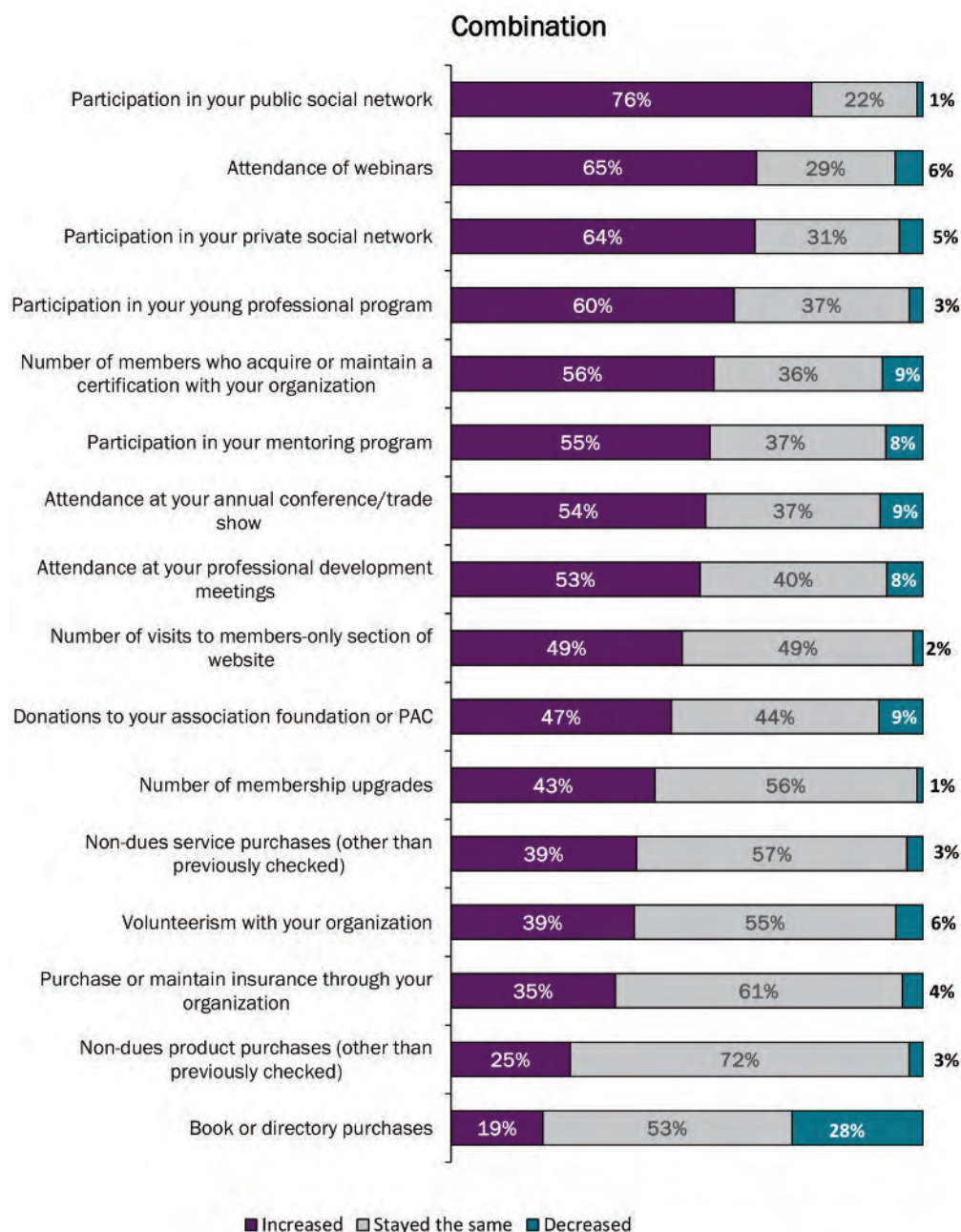


- As a whole, 76% of associations saw an increase in participation in their organization’s public social network, followed by 63% experiencing a rise in both participation in a young professional program and a private social network.
- 76% of associations with increasing renewal rates indicate increased participation in their private social networks.
- 76% of individual member associations and combination associations report an increase in participation in public social networks; 78% of trade associations report an increase.
- 85% of associations with an increase in their renewal rate indicate an increase in the use of their public social networks to drive engagement. 74% of those associations who have a renewal rate of 80% or higher note an increase in participation in their public social network.

Member engagement and participation, cont'd.



- 60% of associations overall saw an increase in webinar participation. 61% of individual member associations and 65% of combination associations saw an increase in webinar attendance.
- Smaller individual member associations (1,000 or fewer members) were significantly more likely to see increases in members' engagement with private social networks.
- The least popular area of engagement has been book or directory purchases, with 20% of all associations reporting a decrease. This decrease ranged from only 11% of all trade associations to 28% of all combination organizations.



- 63% of the associations offering a young professional program report that they saw an increase in participation.
- Some associations have seen a rise in donations to association funds and PACs. 47% of individual member organizations saw an increase (up from 40% in 2015); 57% among trade associations (up from 47% in 2015). Combination associations actually saw a slight decline, with only 47% reporting an increase in foundation/PAC donations (down from 52% reporting an increase in 2015).

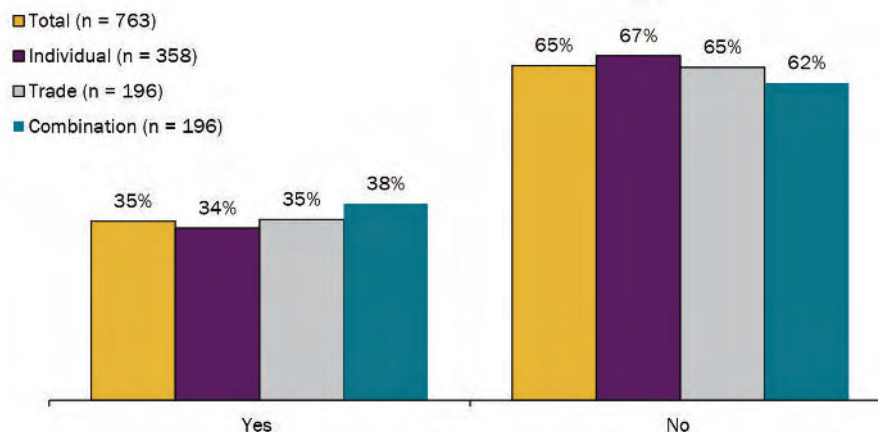
What percentage of your members are engaged in at least one activity?

PERCENTAGE OF MEMBERS ENGAGED IN AT LEAST ONE ACTIVITY				
	Total (n = 501)	Individual (n = 216)	Trade (n = 149)	Combination (n = 127)
Mean %*	55%	52%	64%	50%
Median %	60%	51%	69%	50%
Less than 10%	2%	2%	1%	2%
10 to less than 20%	7%	11%	2%	8%
20 to less than 30%	10%	10%	4%	14%
30 to less than 40%	10%	11%	7%	12%
40 to less than 50%	8%	8%	6%	9%
50 to less than 60%	13%	14%	13%	13%
60 to less than 70%	14%	11%	17%	17%
70 to less than 80%	15%	16%	20%	10%
80 to less than 90%	10%	9%	14%	6%
90 to less than 100%	8%	6%	13%	4%
100%	3%	2%	3%	5%

*Means are influenced by high and low numbers in the data set.

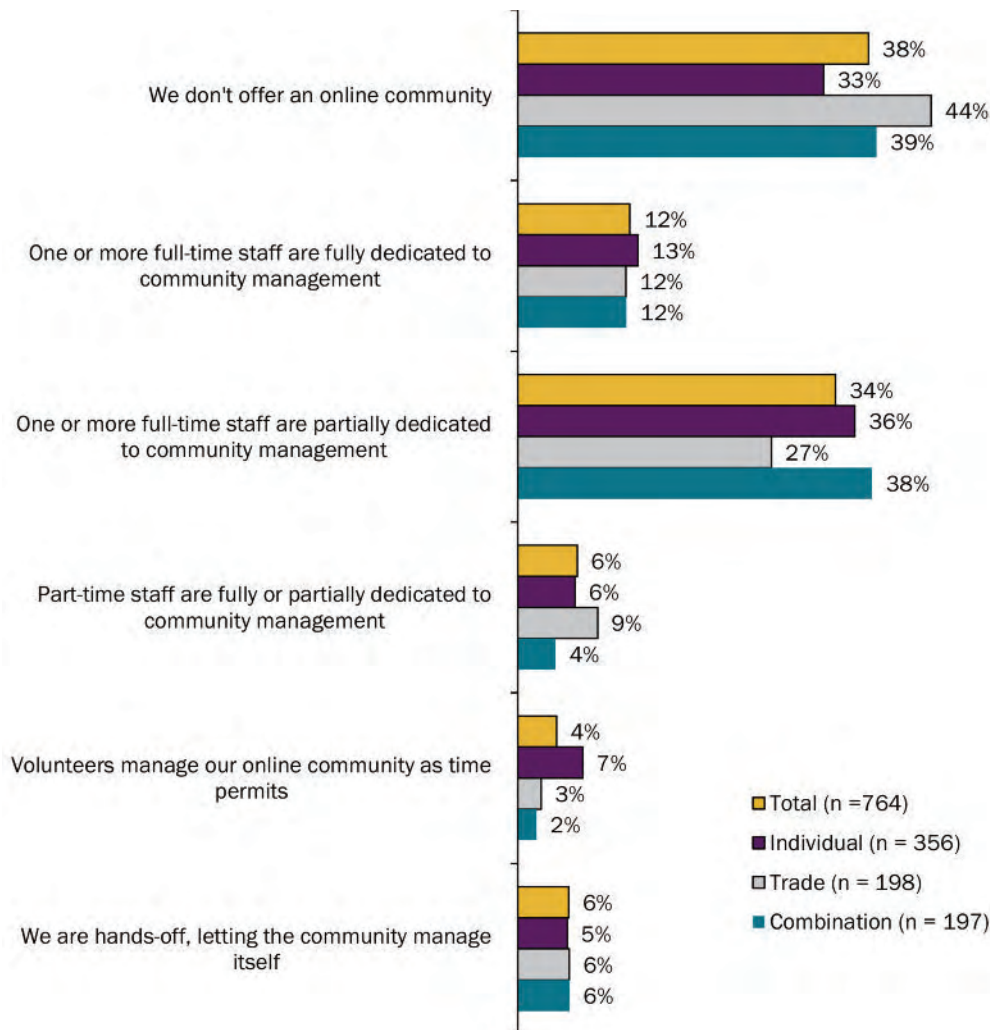
- On average, 55% of all association members have engaged in at least one activity with the association over the past year.
- Trade association members are the most active at 64%, a significant difference from other types of associations.
- Only 50% of combination association members have engaged in an activity.

Do you offer certification?



- 35% of all associations offer certification of some kind.
- 38% of combination associations offer certification, while 34% of individual member associations offer some kind of certification.
- Large trade organizations are significantly more likely to offer certification than smaller trade associations. 44% of trade organizations with 500 or more members offer certification, whereas only 25% of all others do, including only 15% of trade associations with 100 or fewer members.

How do you staff your online community?



- 38% of associations do not offer an online community.
- Individual membership associations are significantly more likely to offer an online community (67%), while only 56% of trade associations offer one.
- Associations tend **not to** devote full-time staff to dedicated management of the community. Only 12% of associations devote at least one full-time staff member to continuous management of their online communities.
- 34% of associations have full-time staff only partially dedicated to the online community management (from 38% of combination associations to 27% of trade associations).
- 16% of associations use a combination of part-time employees, volunteers, or even no one at all to manage their online communities.

What service do you use for your online community?

ONLINE COMMUNITY SERVICE				
	Total (n = 423)	Individual (n = 211)	Trade (n = 95)	Combination (n = 112)
Higher Logic	31%	38%	18%	27%
YourMembership.com	7%	5%	11%	9%
Sociious	4%	5%	2%	4%
MemberFuse	2%	1%	2%	1%
Carehubs	1%	-	2%	3%
Small World Labs	1%	1%	1%	2%
Causeway	<1%	1%	-	-
Kavi	1%	-	1%	1%
Evoq	-	-	-	-
Pathable	-	-	-	-
Other	54%	50%	63%	55%

- Higher Logic is the most popular online community service, utilized by 31% of all associations.
- 38% of individual member organizations use Higher Logic, significantly more than either trade associations (18%) or combination associations (27%).
- While 18% of trade associations use Higher Logic, 11% use YourMembership.com, the highest among any association type.

In what ways have you been able to increase participation in your online community? Check all that apply.

WAYS OF INCREASING PARTICIPATION IN COMMUNITY				
	Total (n = 435)	Individual (n = 218)	Trade (n = 101)	Combination (n = 100)
Content creation	64%	61%	71%	66%
Word-of-mouth	53%	52%	50%	55%
Online community leaders	37%	45%	26%	32%
Other (please specify)	20%	19%	16%	25%

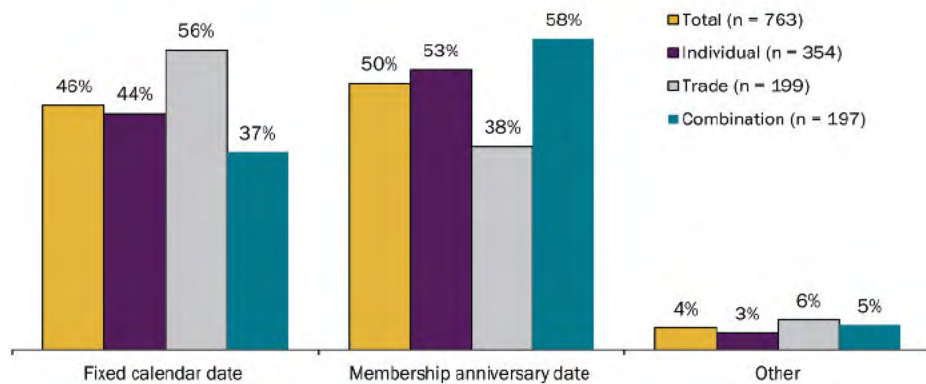
- Content creation is the leading method by which associations have been able to increase participation in their online communities.
- Trade associations are the most active in content creation; 71% have created content for their online communities (vs. 64% overall).

BEST PRACTICES | ENGAGEMENT

How do you measure the effectiveness of your engagement strategy?

-
- We have developed an engagement score that is computed monthly. It is simple, concentrating on the key areas where we want members to be engaged. We use the scores to thank our most engaged and to contact our least engaged to hopefully get them more engaged. (Trade)
-
- We measure each touch point the member makes with our association. We track retention against these engagement touch points. We do member surveys and non-member focus group research. We measure each engagement—i.e., emails, sends, bounces, opens, click-throughs. We then marry up the data with retention and recruitment stats. (IMO)
-
- We host confidential mastermind wisdom share groups that utilize high-end benchmarking technology. The on-boarding process to get our clients prepared for full participation has been significantly enhanced in 2015 to include a year-long education program. It has strengthened participation, pleased existing members whose previous experience was diluted by new members' difficulty with benchmarks and helped decrease attrition by 5%. This process includes a significant number of personalized coaching calls in HR, business development and sales. (IMO)
-
- We can track who uses our online tools which include two (of the three) membership categories. We know that if a first year member actively uses the stock analysis tool they are 2.5 times more likely to renew. We also track total attendees and webinar recording downloads v. total membership as a measure of engagement. (IMO)
-
- Measure renewal rates, number of members and activity in our professional learning networks (special interest groups), attendance of events, access of resources, utilizing store member discounts, signing up to volunteer, and updating their profile. (Combination)
-
- One way is our annual member satisfaction survey. We also implemented tracking some areas such as education/events and other points of engagement to inform on our overall engagement strategy. (Trade)
-
- Use an engagement scoring system with several “buckets” that include number of products purchased or used (we have a lot of free CME), content downloads, email opens/click-thrus, participation in advocacy grass roots campaigns, foundation giving, volunteering, website logins, online community posts, etc. (IMO)
-
- By how many programs/services/events our members utilize/attend. There is a direct correlation between engagement and renewing. (IMO)
-

Is membership renewal based on a fixed calendar date for all members or an anniversary date from the start of the membership?



- Individual member and combination associations are significantly more likely to use membership anniversary dates for renewals (53% and 58% respectively).
- Trade associations are significantly more likely to base renewals on a fixed calendar date (56% vs. 44% for individual member associations and 37% for combination associations).
- Associations with a renewal rate of 80% or higher are significantly more likely to use a fixed renewal date (56% vs. 22%).

After a membership expires, how long is your association's grace period for accessing member benefits?

LENGTH OF GRACE PERIOD				
	Total (n = 760)	Individual (n = 354)	Trade (n = 198)	Combination (n = 195)
One month	21%	25%	14%	22%
2 to 3 months	49%	46%	57%	49%
6 months	10%	9%	16%	7%
One year	2%	2%	3%	3%
More than a year	1%	1%	2%	2%
We don't offer a grace period	16%	18%	9%	18%

- Most associations offer a grace period; only 16% overall do not.
- 70% of associations offer a grace period of 1 to 3 months, with the most popular grace period being 2 to 3 months at 49%.
- Over 54% of the associations with an 80% or higher renewal rate offer a grace period of 2 to 3 months.
- 88% of associations with a renewal rate of 80% or higher have a grace period compared to 79% of associations with a renewal rate of less than 80%.

LENGTH OF GRACE PERIOD BY RENEWAL RATE (IMOs)			
	Total (n = 310)	LT 80% (n = 118)	80%+ (n = 192)
One month	25%	38%	17%
2 to 3 months	47%	39%	52%
6 months	7%	1%	11%
One year	2%	1%	3%
More than a year	1%	0%	2%
We don't offer a grace period	17%	21%	15%

- Individual member organizations with an 80% or higher renewal rate offer a wider range of grace periods: 17% offer a one-month grace period; 52% offer a two- to three-month grace period; and 11% offer a six-month grace period.
- Individual member organizations with renewal rates under 80% typically do not offer a grace period beyond three months; only 1% offer a six-month grace period.

For each member, how many of each of the following membership renewal **CONTACTS** do you have in your renewal series? Please enter a number and not a range.

MEDIAN NUMBER OF MEMBERSHIP RENEWAL CONTACTS IN RENEWAL SERIES				
	Total	Individual	Trade	Combination
Email	4	5	3	4
Mail	2	2	2	2
Phone	1	1	2	1

- Email is the most popular means of contacting members about renewing their membership.
- Individual membership associations rely the most on email, with a median number of five email renewal contacts.
- Phone is the least popular method, with a median of one contact overall, though trade associations make two contacts.
- The median number of renewal emails for individual member associations with more than 20,000 members is five.
- The median number of renewal contacts by mail for all associations is two.

When do you start the renewal effort?

START RENEWAL EFFORT				
	Total (n = 742)	Individual (n = 347)	Trade (n = 192)	Combination (n = 190)
Immediately after welcoming	5%	6%	6%	3%
Prior to 6 months before expiration	4%	6%	3%	2%
At 6 months prior to expiration	4%	5%	6%	2%
5 months prior to expiration	2%	3%	1%	2%
4 months prior to expiration	10%	12%	7%	9%
3 months prior to expiration	40%	41%	33%	44%
2 months prior to expiration	21%	18%	22%	24%
1 month prior to expiration	8%	7%	12%	6%
The month of expiration	4%	2%	6%	6%
Not sure	3%	2%	5%	3%

- Three months prior to expiration is the most popular time to begin renewal efforts. 40% of all associations begin renewal efforts during this time period, with another 21% waiting until two months prior to expiration.
- Associations with an 80% or higher renewal rate are significantly more likely to start at the three-month mark (46% vs. 37%), while those with a lower renewal rate are significantly more likely to wait until the two-month mark (23% vs. 15%).

When do you end renewal efforts (stop renewal contacts to the member)?

END RENEWAL EFFORTS				
	Total (n = 743)	Individual (n = 348)	Trade (n = 193)	Combination (n = 190)
At the month of expiration	4%	3%	3%	5%
1 month after expiration	8%	10%	6%	7%
2 months after expiration	12%	13%	8%	13%
3 months after expiration	21%	18%	23%	25%
4 months after expiration	6%	5%	9%	6%
5 months after expiration	3%	2%	4%	3%
6 months after expiration	11%	10%	14%	8%
More than 6 months after expiration	11%	13%	8%	11%
We don't stop contact	23%	24%	22%	21%
Not sure	2%	1%	3%	2%

- 44% of associations end renewal efforts within three months of expiration.
- 23% of all associations do not stop contacting lapsed members, an increase from the previous study (19% in 2015).
- Associations with renewal rates of less than 80% give up renewal efforts sooner, with 11% giving up after one month and another 17% giving up after two months, both significantly higher rates than those associations with a renewal rate of 80% or higher.

Which of the following marketing channels generates the most membership renewals? You may select up to THREE choices.

TOP MARKETING CHANNELS FOR RENEWALS				
	Total (n = 738)	Individual (n = 347)	Trade (n = 191)	Combination (n = 187)
Email marketing	77%	83%	64%	80%
Mail	58%	65%	47%	57%
Staff phone calls	37%	19%	65%	39%
Peer member contacts	14%	12%	16%	16%
Telemarketing	9%	14%	4%	8%
Board phone calls	6%	6%	6%	4%
Chapter phone calls	4%	5%	2%	5%
Employer contacts	4%	3%	6%	5%
Magazine cover wraps	4%	4%	2%	4%
Social media contacts	2%	3%	2%	2%
Fax	1%	1%	2%	1%
Texting	<1%	<1%	-	1%
Renewal app for mobile devices	-	-	-	-
Other	6%	4%	11%	3%

- Individual member and combination associations report email is the most effective marketing channel for renewals (83% and 80% respectively).
- Trade associations show a slight preference for staff phone calls (65%), a significantly higher percentage than either individual member or combination associations.
- Mail is the second most effective marketing channel for individual member and combination associations.
- Associations with renewal rates of 80% or higher have significantly better success with staff phone calls (45% vs. 20%).
- Associations experiencing a decrease in new membership were significantly more likely to use mail as a marketing channel (75% vs. 57% for those experiencing an increase and 52% for those whose new membership rates remained the same during the past year).
- Larger individual member associations (5,000 or more members) are significantly more likely to use mail as a renewal channel (76% vs. 52%).
- Individual member associations with 1,000 or more members are significantly more likely to use email marketing than smaller individual member associations (85% vs. 71%). Smaller individual member associations (fewer than 1,000 members) are significantly more likely to use staff phone calls as a marketing channel.

Do you offer any of the following renewal options?

Check all that apply.

TOP RENEWAL OPTIONS				
	Total (n = 481)	Individual (n = 240)	Trade (n = 113)	Combination (n = 120)
Installment renewal payments (monthly, quarterly)	41%	38%	64%	27%
Multi-year renewals	30%	39%	12%	30%
Automatic annual credit card renewal	29%	34%	20%	24%
Lifetime membership	24%	30%	8%	27%
Renewal bill-me	19%	12%	25%	27%
Early-renewal discounts	16%	16%	15%	15%
Automatic annual Electronic Funds Transfer (EFT) renewals	14%	12%	19%	13%
Gift or premiums for renewal	11%	14%	7%	10%

- Trade associations are significantly more likely to offer installment renewal payments (64% vs. 38% for individual member associations and 27% for combination associations).
- Multi-year renewals are a popular option for individual member and combination associations (39% and 30% respectively).
- Associations with renewal rates of 80% or higher are significantly more likely to offer installment renewal plans (49% vs. 30%), renewal bill-me plans (21% vs. 12%), and automatic annual EFT renewals (16% vs. 9%).
- Associations with renewal rates less than 80% are significantly more likely to offer multi-year renewals (47% vs. 23%) and automatic annual credit card renewals (37% vs. 26%).

TOP 3 RENEWAL OPTIONS BY SIZE			
INDIVIDUAL			
Up to 1,000 (n=56)	1,001 to 5,000 (n=98)	5,001 to LT 20,000 (n=104)	20,000+ (n=86)
1. Installment payments	1. Automatic annual credit card renewal	1. Multi-year renewal	1. Automatic annual credit card renewal
2. Bill-me	2. Multi-year renewal	2 (tie). Lifetime membership /	2. Multi-year renewal
3. Lifetime membership	3. Installment payments	2 (tie). Installment payments	3. Lifetime membership
TOP 3 RENEWAL OPTIONS BY SIZE			
TRADE			
Up to 100 (n=52)	101 to LT 500 (n=82)	500+ (=124)	
1. Installment payments	1. Installment payments	1. Installment payments	
2 (tie). Automatic annual credit card renewal	2. Bill-me	2. Automatic annual credit card renewal	
2 (tie). Automatic annual EFT renewal	3. Multi-year renewal	3. Multi-year renewal	

- Installment payments are popular among organizations of all sizes except the largest individual member organizations (20,000 or more).
- Multi-year and automatic annual credit card renewals are also favored across many different-sized organizations. 30% of associations offer multi-year renewals; 29% of associations have an automatic annual credit card renewal option.

What do you believe are the top reasons members DO NOT renew their membership in your organization?

You may select up to THREE choices.

TOP REASONS FOR NOT RENEWING MEMBERSHIP				
	Total (n = 748)	Individual (n = 352)	Trade (n = 194)	Combination (n = 189)
Lack of engagement with the organization	33%	28%	40%	35%
Left the field, industry, or profession	30%	37%	17%	31%
Could not justify membership costs with any significant ROI	29%	26%	43%	21%
Budget cuts/economic hardship of company	28%	17%	50%	26%
Employer won't pay or stopped paying dues	26%	34%	4%	33%
Lack of value	21%	19%	20%	25%
Forgot to renew	19%	24%	11%	17%
Too expensive	18%	22%	16%	14%
Retirement	17%	21%	6%	21%
Company closed or merged	14%	1%	39%	12%
Student memberships do not convert to full memberships	8%	11%	-	9%
Disappointment with the benefits/services	7%	6%	6%	9%
Lack of relevance	7%	8%	5%	6%
Can get materials from other members/other sources	6%	8%	6%	4%
Moved	5%	6%	3%	7%
Lost job	4%	5%	-	6%
Disagree with advocacy position of the association	2%	2%	4%	1%
Switch to competitor	2%	3%	1%	2%
Poor customer service	<1%	<1%	-	1%
Not sure	1%	1%	1%	1%
Other	6%	8%	5%	4%

- Individual member associations cite leaving the field, industry, or profession as the most common reason that members do not renew (37%).
- Trade associations point to budget cuts and economic hardships within member companies as the main reason their members do not renew (50%).
- Combination organizations cite lack of engagement with the organization as the main reason for non-renewal (35%).
- Employer refusal or discontinuation of dues payment is the second leading cause of non-renewal among individual member and combination associations (34% and 33% respectively).
- 24% of individual member associations say members forgot to renew, a significantly higher rate than other associations (11% for trade associations; 17% for combination associations).

After a membership lapses or expires, how long do you continue to contact the members to invite them to reinstate their membership?

CONTACT AFTER MEMBERSHIP LAPSE OR EXPIRATION				
	Total (n = 744)	Individual (n = 350)	Trade (n = 194)	Combination (n = 187)
We don't contact lapsed members	12%	14%	9%	13%
1 year after expiration	18%	19%	13%	20%
2 years after expiration	11%	14%	10%	8%
3 years after expiration	7%	8%	5%	9%
4 to 5 years after expiration	5%	6%	4%	4%
6 or more years after expiration	2%	2%	1%	2%
We continue indefinitely to contact lapsed members	34%	28%	47%	32%
Not sure	5%	4%	5%	6%
Other	6%	6%	5%	8%

- A third of all associations continue to contact lapsed members indefinitely, continuing the upward trend since 2011.
- 47% of trade associations contact lapsed members indefinitely, a significantly higher rate than individual member associations (28%) and combination associations (32%).
- Aside from those that contact lapsed members indefinitely, associations tend not to go much beyond two years. 29% of all associations make contact up through only the second year of a lapsed membership.

What channel generates the most reinstated lapsed members?

Please select up to TWO answer choices.

TOP CHANNEL FOR REINSTATING LAPSED MEMBERS				
	Total (n = 681)	Individual (n = 319)	Trade (n = 180)	Combination (n = 170)
Email	66%	70%	56%	68%
Phone	41%	31%	55%	46%
Direct mail	35%	45%	23%	28%
Social media	2%	2%	-	4%
Fax	<1%	-	1%	-
Text	<1%	-	-	1%
Other	12%	9%	16%	13%

- Email is the top channel for reinstating lapsed members at 66%.
- The next most popular channel is phone for trade associations (55%) and combination associations (46%).
- 45% of Individual member associations cite direct mail as a top channel for reinstating lapsed members. This is largely driven by associations with over 20,000 members (59%).
- Email and direct mail are the primary channels for individual member associations with 20,000 or more members.

BEST PRACTICES | RENEWAL AND REINSTATEMENT

Describe an engagement or retention strategy that your association has employed that has been very successful, and/or from which you learned something valuable. Provide details so that others may learn from your experience.

-
- Telemarketing to lapsed members is expensive but good ROI overall. We've created a position whose full function is member engagement. He/she will make calls/outreach to new, lapsed, and graduating members. (IMO)
-
- We engage with them early and often through personal contacts from the staff, board and connecting with other members. Those members with new primary contacts that slip through the cracks do not renew because they weren't engaged in the process early enough. We probably have the highest turnover in primary contacts of most associations. (Trade)
-
- Our monthly member orientations have been successful in getting folks starting to participate in the online community and other resources. We've found that encouraging members to participate with other staff members is also helpful so more staff is familiar with benefits and value membership can provide. (Combination)
-
- Self-designed "30/60/90/120 Plan"—multi-tiered communication efforts directed towards benefit awareness, inviting engagement, extracting personal growth value, education opportunities and industry issue awareness and participation. Combinations of emails, white papers, social media contacts and personal telephone outreach from board members and senior staff. (Trade)
-
- We believe if a new member engages with another member and feel like they are part of a group, they are more likely to remain a member for a long time. The most successful strategy is to convert general members to credentialed members. We have found that credential members stay as members for an average of 37 years compared to approximately 7 years for general members. (IMO)
-
- The onboarding program is designed to welcome, engage, nurture and ultimately renew our year-1 members in order to boost that all-important 1st-year renewal rate. The program consists of a welcome email from the CEO, a mailed new member welcome kit with welcome letter, web navigation and most-popular content-specific information, a personal welcome phone call, dedicated member benefits email series, a new member benefits webcast and non-engagement prompts. We find that repetition reinforces the messages of engagement, particularly when using multiple channels. And we also learned that this program was more easily managed once the email series was automated. (IMO)
-
- Two years ago we started a monthly non-member e-digest. Simple, scanable, mobile-enabled format, no paid advertising, and unabashedly self-promoting. Every issue has one general item—profession update—and one item that is open to non-members—free CME/resource—and 2-3 blurbs on products/services that only members can receive for free or at a discount. Good open rates and click-thrus. Has helped increase our non-dues product revenue, and we can see that non-members who open the digest are easier to reinstate. (2) Deeply lapsed members (more than 5 years) have responded well to multi-media campaigns that use multiple direct mail touch-points—initial DM, follow-up email, final DM. The messaging hasn't been as important as the repeat use of direct mail. Good conversions (>4%), but DM costs = lower ROI. In order to sustain growth, we are beginning to budget to reach these more difficult win-backs. Not enough data yet to determine if we are retaining at our standard levels. (IMO)
-

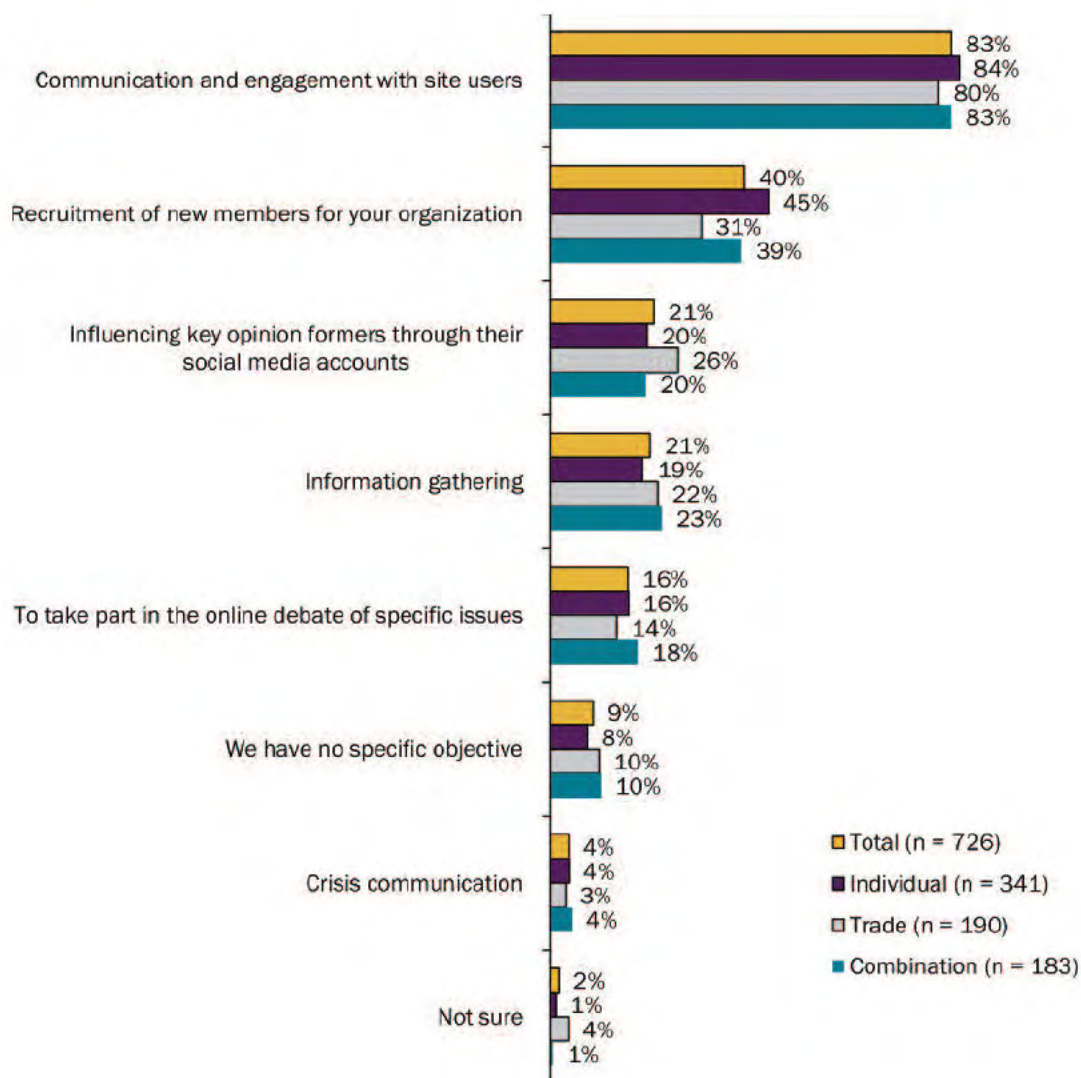
Which social media does your organization officially use?

Check all that apply.

SOCIAL MEDIA USED BY ASSOCIATIONS				
	Total (n = 752)	Individual (n = 354)	Trade (n = 196)	Combination (n = 189)
Facebook	91%	93%	85%	93%
Twitter	85%	87%	83%	84%
LinkedIn (Public)	63%	60%	70%	65%
YouTube	56%	57%	54%	58%
LinkedIn (Association Members Only)	36%	33%	40%	37%
Association Blog	23%	24%	18%	27%
Instagram	22%	26%	18%	20%
Private Association Social Network	14%	18%	7%	14%
Pinterest	14%	17%	8%	14%
Association Listserv	13%	15%	10%	10%
Flickr	11%	11%	13%	10%
Google +	11%	14%	6%	11%
Wikis	2%	2%	1%	3%
Ning/Groupsite	1%	<1%	1%	1%
None—we don't use social media	2%	1%	2%	1%
Other	2%	3%	1%	3%

- Facebook and Twitter remain the two most popular social media platforms for every type of association.
- Trade associations are significantly less likely to use Facebook than individual member and combination associations.
- Associations with renewal rates of 80% or more are significantly **less likely** to use Facebook and Association Blogs than those with lower renewal rates.
- Associations with 5,000 members or more are significantly more likely to use YouTube than smaller associations.

What are your association's main reasons for using social media? You may select up to THREE choices.



- Associations primarily use social media for communication and engagement with site users (83% overall).
- 40% of associations use social media to recruit new members for their organization. This is up from 26% last year.
- 21% of associations use social media for information gathering, up from 10% last year.

How frequently do you provide content updates on each of the following social media channels?

FREQUENCY OF CONTENT UPDATES (TOTAL)							
	More than once a day	Once a day	Once a week	2-3 times a month	Once a month	Less than once a month	Never
Facebook (n = 649)	15%	33%	33%	11%	4%	3%	1%
Twitter (n = 611)	30%	28%	26%	9%	4%	3%	1%
LinkedIn (n = 568)	5%	16%	36%	18%	10%	11%	3%
Instagram (n = 156)	5%	14%	35%	21%	8%	16%	2%
YouTube (n = 389)	1%	1%	13%	21%	20%	42%	2%
Association Blog (n = 160)	4%	19%	38%	18%	12%	6%	2%

FREQUENCY OF CONTENT UPDATES (INDIVIDUAL)							
	More than once a day	Once a day	Once a week	2-3 times a month	Once a month	Less than once a month	Never
Facebook (n = 312)	19%	35%	31%	9%	4%	2%	<1%
Twitter (n = 294)	32%	30%	25%	8%	3%	2%	<1%
LinkedIn (n = 251)	6%	19%	35%	16%	9%	11%	4%
Instagram (n = 86)	3%	14%	31%	28%	8%	14%	1%
YouTube (n = 185)	-	2%	14%	23%	24%	36%	1%
Association Blog (n = 77)	4%	19%	42%	18%	12%	3%	3%

FREQUENCY OF CONTENT UPDATES (TRADE)							
	More than once a day	Once a day	Once a week	2-3 times a month	Once a month	Less than once a month	Never
Facebook (n = 161)	11%	29%	34%	12%	6%	6%	2%
Twitter (n = 156)	28%	26%	24%	11%	6%	3%	2%
LinkedIn (n = 165)	6%	12%	36%	23%	13%	9%	2%
Instagram (n = 35)	9%	14%	40%	20%	6%	9%	3%
YouTube (n = 100)	1%	-	13%	23%	14%	45%	4%
Association Blog (n = 33)	9%	12%	33%	24%	9%	9%	3%

FREQUENCY OF CONTENT UPDATES (COMBINATION)							
	More than once a day	Once a day	Once a week	2-3 times a month	Once a month	Less than once a month	Never
Facebook (n = 167)	13%	32%	35%	13%	3%	4%	1%
Twitter (n = 151)	30%	25%	29%	8%	3%	6%	-
LinkedIn (n = 145)	3%	16%	37%	17%	10%	15%	3%
Instagram (n = 34)	6%	12%	38%	3%	9%	29%	3%
YouTube (n = 101)	1%	1%	14%	17%	17%	51%	-
Association Blog (n = 49)	2%	25%	37%	14%	14%	8%	-

- Twitter and Facebook are the two most frequently-updated platforms. 58% of associations update Twitter at least once a day, while 48% update Facebook that often.
- Individual member associations are most likely to update their Facebook feed more than once a day (19%), while trade associations are the least likely (11%).
- Instagram is becoming increasingly popular. 53% of associations use Instagram at least once a week, up from 16% last year.

FREQUENCY PROVIDING CONTENT UPDATES ON SOCIAL MEDIA (FACEBOOK)				
	Total (n = 649)	Individual (n = 312)	Trade (n = 161)	Combination (n = 167)
More than once a day	15%	19%	11%	13%
Once a day	33%	35%	29%	32%
Once a week	33%	31%	34%	35%
2-3 times a month	11%	9%	12%	13%
Once a month	4%	4%	6%	3%
Less than once a month	3%	2%	6%	4%
Never	1%	<1%	2%	1%

FREQUENCY PROVIDING CONTENT UPDATES ON SOCIAL MEDIA (TWITTER)				
	Total (n = 611)	Individual (n = 294)	Trade (n = 156)	Combination (n = 151)
More than once a day	30%	32%	28%	30%
Once a day	28%	30%	26%	25%
Once a week	26%	25%	24%	29%
2-3 times a month	9%	8%	11%	8%
Once a month	4%	3%	6%	3%
Less than once a month	3%	2%	3%	6%
Never	1%	<1%	2%	-

Social media updates, cont'd.

FREQUENCY PROVIDING CONTENT UPDATES ON SOCIAL MEDIA (LINKEDIN)				
	Total (n = 568)	Individual (n = 251)	Trade (n = 165)	Combination (n = 145)
More than once a day	5%	6%	6%	3%
Once a day	16%	19%	12%	16%
Once a week	36%	35%	36%	37%
2-3 times a month	18%	16%	23%	17%
Once a month	10%	9%	13%	10%
Less than once a month	11%	11%	9%	15%
Never	3%	4%	2%	3%

- Associations engage members on Facebook one to five times per week.
- Over one-third of associations update their LinkedIn account just once a week.

BEST PRACTICES | SOCIAL MEDIA

Describe how you have used social media for your association in a very successful manner. Provide details so that others may learn from your experience.

- We have successfully used Twitter to increase our members' engagement with policy makers and the media at our annual Public Policy Symposium. We actively encourage our members to tweet updates and photos from meetings with their elected representatives and local media whose names we provide for them. (Trade)
- Geo-targeting special interest audiences through FB has been instrumental in driving traffic to our website. Content marketing with our president's blog drives the highest audience participation to our website, which we market through FB. Next up is a more organized approach to our YouTube channel, utilizing HubSpot to calendar content in 2016. It is labor intensive and we've just secured a consultant to deliver services. (IMO)
- We use a hashtag for our annual conference and have found this to be a successful channel for generating buzz pre- and post-conference, as well as a great means of connection, information sharing, and customer service support before, during, and after the conference. (Combination)
- Social Media is most effective on location at our bi-annual conventions and annual educational events. Especially when we allow the members to participate in the posting with pictures, hashtags, and trending. During the rest of the year, our YouTube traffic continues to grow as the most effective social media means of member engagement and new member recruitment. We are releasing new content regularly with some videos going viral. (IMO)
- Sharing members' stories on our association blog—they love to see their name in print and to be able to share it with colleagues. On Twitter we are able to get the word out about proposed regulations affecting our industry early, so constituents know they can look to us for up-to-date information. (IMO)

What are your organization's biggest internal challenges to growing membership? Please select up to THREE responses.

TOP THREE BIGGEST <u>INTERNAL</u> CHALLENGES TO GROWING MEMBERSHIP				
	Total (n = 728)	Individual (n = 342)	Trade (n = 190)	Combination (n = 183)
Difficulty in communicating value or benefits	31%	30%	30%	32%
Insufficient staff	29%	26%	34%	28%
Membership too diverse; difficulty meeting needs of different segments	24%	24%	24%	23%
Difficulty in proving ROI	23%	17%	35%	21%
Difficulty identifying/contacting prospects	21%	21%	24%	20%
Difficulty attracting and/or maintaining younger members	19%	23%	8%	22%
Insufficient budget	18%	19%	18%	15%
Lack of a strategy or plan	17%	18%	13%	20%
Inadequate association management database	17%	15%	17%	20%
Weak product or service offerings	12%	14%	10%	13%
Difficulty in converting student memberships to regular memberships	11%	17%	-	14%
Lack of integration between national and chapters	9%	14%	3%	7%
Lack of marketing expertise	9%	7%	11%	9%
Inadequate research to understand market	8%	8%	5%	10%
Misalignment of goals between board and executive staff	4%	4%	2%	5%
Other	8%	9%	11%	6%

- The primary internal challenges to growing membership are difficulty in communicating value or benefits, insufficient staff, and difficulty meeting members' needs due to a broad membership base.
- Across all association types, associations struggle with communicating value or benefits and insufficient staff.
- Over a third of trade associations report difficulty in proving ROI.
- Individual member and combination associations are more likely to have difficulty attracting and/or maintaining younger members (23% and 22%, respectively) and converting student memberships to regular members (17% and 14%, respectively).
- For those associations indicating a decrease in their renewal rates, the biggest internal challenge to growing membership is that their membership is too diverse.
- For associations with 80% or higher renewal rates, the primary challenges to growing membership are difficulty in communicating the value of benefits (30%) and insufficient staff (30%). About a quarter of these associations also struggle with diverse memberships (i.e., difficulty meeting the needs of different segments), proving ROI, and identifying/contacting prospects.
- Individual member associations with 5,000 or more members cite communicating value or benefits to members as the biggest internal challenge to growing membership (31%).
- Almost a third of individual member associations with 20,000 or more members have difficulty attracting and/or maintaining young members (32%).
- Individual member associations with 5,000 to 20,000 members are more likely to have difficulty converting student members to regular memberships.

What are your organization's biggest external challenges to growing membership? Please select no more than TWO responses.

TOP TWO BIGGEST <u>EXTERNAL</u> CHALLENGES TO GROWING MEMBERSHIP				
	Total (n = 723)	Individual (n = 339)	Trade (n = 189)	Combination (n = 182)
Competitive association(s) or sources of information	34%	40%	30%	29%
Economy/cost of membership	31%	28%	37%	29%
Perception of the association and/or its culture (i.e., old boy's network, not specialized enough, etc.)	26%	27%	26%	26%
Lack of brand awareness	24%	24%	19%	32%
Declining member/employer budgets	22%	23%	13%	27%
Industry consolidation/industry shrinkage	18%	10%	34%	15%
Changing demographics of industry/fewer young people in industry	14%	16%	6%	17%
Market saturation	8%	9%	9%	4%
Other	7%	7%	7%	6%

- Competitive association(s) or sources of information (34%) and economy/cost of membership (31%) are the biggest external challenges to growing membership.
- Trade associations are more likely to struggle with factors related to the economy/cost of membership (37%) and industry consolidation/industry shrinkage (34%).
- Lack of awareness is one of the primary external challenges to growing membership.
- Compared to trade associations, individual member and combination associations are more likely to report that declining member/ employer budgets hinder membership growth.
- Associations that report a decrease in new members (38%) are more likely to report the biggest hurdle to growing membership is the perception of the association and/or its culture (i.e., old boy's network, not specialized enough, etc.).
- Associations with lower operating budgets (less than \$5 million) are more likely to struggle with lack of brand awareness (29%).

What are your association's top membership goals?

You may select up to TWO choices.

ASSOCIATIONS' TOP GOALS				
	Total (n = 734)	Individual (n = 344)	Trade (n = 192)	Combination (n = 185)
Increasing member engagement	47%	44%	53%	48%
Increasing membership retention	47%	52%	39%	47%
Increasing membership acquisition	47%	45%	45%	51%
Increase understanding of member needs	16%	16%	15%	17%
Increasing non-dues revenue from members (attendance at conferences, purchase of services/ education, etc.)	16%	14%	20%	14%
Increasing dues revenue	15%	15%	16%	15%
Increasing member diversity	7%	9%	5%	6%
Other	1%	2%	1%	1%

- The utmost associations' goals are increasing member engagement, membership retention, and membership acquisition.
- Two in ten trade associations cite increasing non-dues revenues from members as a primary membership goal.
- The majority of individual member associations aim to grow membership retention, while combination associations largely seek to increase membership acquisition.
- Compared to associations with 80% or higher renewal rates, associations with renewal rates under 80% are more likely to report that increasing membership retention is a primary membership goal (37% vs. 70%).
- The primary membership goals for associations with 80% or higher renewal rates are increasing member engagement (50%), increasing membership acquisition (48%), and increasing membership retention (37%).
- Associations with less than 60% new member renewal rates aim to boost membership retention rates (66%), while associations with 80% or higher new member renewal rates seek to increase member engagement (57%).

On average, how many emails does a member receive from your association in any given week? If you are unsure, check not sure.

EMAILS PER WEEK				
	Total (n = 646)	Individual (n = 302)	Trade (n = 172)	Combination (n = 164)
Less than 1	1%	1%	1%	1%
1	14%	14%	9%	17%
2	24%	25%	22%	23%
3	23%	20%	24%	26%
4	10%	11%	9%	11%
5	14%	12%	16%	15%
6	2%	2%	4%	1%
7	4%	4%	6%	2%
8	2%	2%	2%	1%
9	1%	1%	1%	1%
10 or more	6%	8%	6%	4%
Mean	4	4	4	4
Median	3	3	3	3

- On average, associations send their members four emails weekly.
- 47% of associations report their members receive two to three emails per week from their association.
- A quarter of individual member associations report their members receive two emails from their association in any given week.
- Trade and combination associations are more likely to report that they send their members about three emails on a weekly basis.
- As operating budgets increase, so does the average number of emails sent in any given week by associations.

What is your average open rate (percentage) on the following types of emails? If you are unsure, check not sure.

AVERAGE OPEN RATE FOR EMAILS				
	Total	Individual	Trade	Combination
Membership renewal campaigns	40%	39%	48%	34%
Meetings/conferences marketing	33%	34%	33%	31%
Association news/newsletters	32%	35%	30%	31%
Membership acquisition campaigns	21%	23%	20%	19%

- The average open rate for membership renewal campaigns is 40% — the highest open rate among the listed types of emails. This is especially true for trade associations.
- With only a 21% open rate, membership acquisition campaign emails have the lowest open rate.
- About two-thirds of associations with 80% or higher renewal rates have open rates between 20% and 40% (63%) compared to only 53% of associations with renewal rates under 80% who report similar open rates.
- Regarding association news/newsletters, 54% of associations with \$20 million operating budgets have open rates of 20% to 30%, while associations with operating budgets between \$1 million and \$5 million are more likely to report 30% to 40% open rates (30%).
- Over one-third of associations with \$5 million to \$20 million operating budgets report membership acquisition campaign email open rates between 10% and 20%.
- Associations with operating budgets up to \$1 million are more likely than associations with larger budgets to report that their association news/newsletters open rates are between 60% and 79% (14%).
- Over 90% of associations with \$1 million or more operating budgets report that their open rates for association news/newsletters are below 60%.

BEST PRACTICES | CHALLENGES AND GOALS

What are your organization's marketing strengths?

-
- Nimble/fast to respond or create a new campaign; we know our certificants; great customer service we can leverage; surveys; strong programs—we give back to the profession; high engagement; we seek out certificants doing great things so we can recognize them. (Combination)
-
- All conversations, programs, new initiatives are aligned with how to market, identifying strategies and include conversations with the full staff. We have great resources and backing from our Board. (IMO)
-
- Social Media. We just brought on a new communications manager with a strong background in social media and online communities and we are looking forward to some great progress in the coming year. (Combination)
-
- Digital marketing (new website, new newsletter, new apps). Brand new renewal/join system & communications (new applications, new invoices, clearer communication on benefits & value, new auto-renewal system, easier upgrade system, better messaging). Direct Mail (New, more powerful & cohesive messaging, improved collateral, more professional publications, better tracking). (Trade)
-
- Convoluted messages, too many non-coordinated messages, different messages from silos, inconsistent branding/campaigning. (Combination)
-
- Lack of follow-through via drip campaign/automation; poor database description of non-members; difficulty of finding new sectors and their contacts; difficulty in finding big data/behavior data in our database; lack of long-term pricing strategy. (Combination)
-
- No dedicated staff, inconsistent branding, no testing, no follow-up. This is the most analytics we've done on things like open rates... ever! (Combination)
-
- We have data on our members stored in a variety of areas without a way to easily connect all of the data points to gain a comprehensive, holistic view of our members for enhanced targeting. Another weakness is competing priorities which at times can lead to competing communications. (IMO)
-
- Everything is done in silos. There is no overall strategy to market to our members and we don't engage them; we just try to sell them something. (IMO)
-
- Lack of a comprehensive plan on how to reach out to non-members by targeting them on a more personalized level. Focus on their age group, practice specialty, geographic location (urban vs rural), practice type (owner vs employed), size of organization, etc. (IMO)
-
- Many products and benefits have a "so what?" response so they are hard to get the user to see the "value." Stakeholders have blinders, thinking their product has more value than what our end users are telling us it does. (IMO)
-
- We need to devote more time and resources to grow membership and increase the benefits so the program is more valuable to those who join us. (Combination)
-

What membership categories does your association offer?

Check all that apply.

MEMBERSHIP CATEGORIES OFFERED				
	Total (n = 732)	Individual (n = 343)	Trade (n = 191)	Combination (n = 185)
Individual Basic	58%	77%	7%	77%
Student	52%	72%	11%	58%
Company/Institutional/Organization	47%	13%	83%	74%
Retired	43%	60%	13%	45%
Associate	37%	38%	38%	34%
Affiliate	26%	26%	25%	29%
Lifetime	26%	34%	8%	30%
Honorary	25%	28%	15%	28%
International	24%	30%	17%	20%
Young Professional (those new to the profession/industry)	16%	21%	3%	20%
Academic	15%	16%	11%	18%
Vendor/Supplier	14%	6%	28%	15%
Multi-year	13%	20%	3%	12%
Transitioning student/Recent graduate	12%	18%	2%	11%
Group (multiple Individuals)	11%	11%	3%	16%
Government/Public sector	10%	7%	14%	13%
Individual Plus (added benefits to basic membership)	10%	13%	2%	13%
Unemployed	10%	13%	2%	12%
Non-profit	6%	3%	11%	8%
Online only (paperless)	6%	11%	1%	5%
Consultant	6%	3%	9%	8%
Military	6%	7%	-	9%
Family	5%	9%	-	4%
Freemium (no-cost membership)	4%	4%	1%	6%
Publications only	1%	2%	-	1%
Other	9%	9%	7%	8%

- The top membership categories are individual basic (58%), student (52%), and company/institutional/organization (47%).
- Six in ten individual member organizations offer retired memberships—more than any other association type.
- The majority of individual member organizations (72%) and combination associations (58%) offer student memberships.
- Compared to other association types, trade associations are more likely to offer vendor/supplier memberships.
- As new member renewals increase, the likelihood of offering individual basic and student memberships decreases. Conversely, as new member renewal rates increase, so does the likelihood of offering company/institutional/organization memberships.
- Half of associations with \$5 million or more in operating budgets offer memberships for retirees.
- Associations are more likely to offer lifetime memberships as operating budgets increase.

What percentage of your student memberships ultimately convert to full memberships? If you are unsure, check not sure.

PERCENTAGE OF STUDENT TO FULL MEMBERSHIP CONVERSION			
	Total (n = 184)	Individual (n = 130)	Combination (n = 44)
Mean	29%	33%	18%
Median	22%	26%	15%
Less than 10%	23%	15%	32%
10 to less than 20%	18%	17%	25%
20 to less than 30%	21%	22%	21%
30 to less than 40%	11%	12%	14%
40 to less than 50%	5%	6%	2%
50 to less than 60%	7%	9%	2%
60 to less than 70%	7%	8%	5%
70 to less than 80%	3%	4%	-
80 to less than 90%	2%	2%	-
90 to less than 100%	3%	5%	-
100%	1%	-	-


- On average, 29% of student memberships convert to full memberships.
- Individual member organizations are much more likely to have 50% or more of their student members convert to full members (28% vs. 7% of combination organizations).
- A third of combination associations report less than 10% of their student members become full members.
- Compared to associations with 80% or higher renewal rates, associations with renewal rates of less than 80% are more likely to have 20% to 30% of their student memberships convert to full memberships (26%).
- Almost half of associations with operating budgets over \$20 million are more likely to report 20% to 30% student-to-full-membership conversion rates (47%).

What percentage of your members are international (outside your country)? If you are unsure, check not sure.

PERCENTAGE OF INTERNATIONAL MEMBERS				
	Total (n = 160)	Individual (n = 96)	Trade (n = 30)	Combination (n = 31)
Mean	10%	10%	12%	12%
Median	5%	5%	5%	5%
Less than 10%	68%	68%	67%	68%
10 to less than 20%	12%	13%	10%	13%
20 to less than 30%	10%	11%	13%	3%
30 to less than 40%	5%	5%	3%	7%
40 to less than 50%	3%	3%	-	3%
50 to less than 60%	1%	-	-	7%
60 to less than 70%	-	-	-	-
70 to less than 80%	1%	-	7%	-
80 to less than 90%	-	-	-	-
90 to less than 100%	-	-	-	-
100%	-	-	-	-

- Regardless of membership type, nearly 70% of associations report that less than 10% of their members are international.

On average, how much are your basic annual membership dues?
Do not put a range. Please answer in USD.

ANNUAL MEMBERSHIP DUES STRUCTURE				
	Total (n = 717)	Individual (n = 337)	Trade (n = 188)	Combination (n = 179)
We have a sliding scale	35%	17%	69%	32%
Basic dues	65%	83%	31%	68%
				
BASIC ANNUAL MEMBERSHIP DUES				
	Total (n = 460)	Individual (n = 278)	Trade (n = 57)	Combination (n = 121)
Under \$50	8%	9%	-	10%
\$50 to \$99	13%	13%	4%	17%
\$100 to \$149	13%	14%	5%	13%
\$150 to \$199	12%	13%	5%	12%
\$200 to \$299	17%	16%	11%	22%
\$300 to \$399	12%	13%	7%	11%
\$400 to \$499	9%	10%	12%	5%
\$500 to \$749	8%	7%	18%	4%
\$750 to \$999	2%	2%	2%	3%
\$1000 and over	8%	4%	37%	4%
Mean	\$729	\$306	\$2352	\$622
Median	\$234	\$218	\$500	\$195

- Two-thirds of associations use basic dues for their membership dues structure.
- Trade associations (69%) are more likely than individual (17%) and combination (32%) associations to use a sliding scale for membership dues.
- The bulk of individual (16%) and combination (22%) associations have annual membership dues between \$200 and \$299, while over a third of trade organizations have membership dues of \$1,000 or more.
- For individual member associations, the average basic annual dues decreases as the number of paid members increases.
- Associations that report higher member renewals over the past year are more likely to indicate their basic annual membership dues are \$150 to \$199 (19%). Conversely, associations that indicate decreases in member renewals state their basic annual membership dues are \$50 to \$99 (21%).

How often does your association raise membership dues?

MEMBERSHIP DUES INCREASE				
	Total (n = 730)	Individual (n = 341)	Trade (n = 193)	Combination (n = 183)
Annually	23%	25%	28%	17%
Every other year	5%	5%	5%	6%
As needed	54%	55%	51%	57%
Never	7%	7%	9%	6%
Other	11%	9%	8%	14%

- The majority of associations increase membership dues on an as needed basis.
- Combination associations are more likely than individual member and trade associations to increase dues at other intervals.
- Associations with more than \$20 million operating budgets are more likely to raise membership dues annually (35%), while associations with up to \$1 million operating budgets are more likely to increase membership dues as needed (64%).
- 7% of associations say that they never raise membership dues.

When was the last time your association raised membership dues?

LAST MEMBERSHIP DUES INCREASE				
	Total (n = 709)	Individual (n = 330)	Trade (n = 189)	Combination (n = 177)
2016 or plan to this year	29%	27%	36%	24%
2015	22%	21%	20%	24%
2014	10%	12%	8%	11%
2013	7%	8%	4%	8%
2012	7%	6%	6%	7%
2011	3%	3%	2%	5%
2010	6%	7%	3%	7%
Other year	17%	16%	22%	14%

- Nearly 30% of associations have increased or plan to increase their membership dues in 2016.
- Compared to other associations, trade associations are more likely to increase or have already increased their membership dues in 2016.
- Combination associations are equally as likely to report that they will or have already increased their membership dues in 2016 (24%).
- More than 20% of trade associations have not increased their membership dues in the past 6 years.
- Six in ten associations have increased dues since 2014, or plan to increase dues this year.
- A third of individual member associations with 5,000 to 20,000 members are more likely to increase or plan to increase membership dues in 2016 (34%).
- More than one-third of associations with operating budgets of \$5 million or more plan to increase their membership dues in 2016 (36%), compared to only 24% of associations with lower budgets that plan to increase their dues.

What was the average percentage of your last membership dues increase across all membership categories?

If you are unsure, please check not sure.

AVERAGE PERCENTAGE OF INCREASE IN MEMBERSHIP DUES				
	Total (n = 552)	Individual (n = 264)	Trade (n = 139)	Combination (n = 141)
Mean	10%	10%	10%	11%
Median	5%	5%	5%	8%
Less than 10%	65%	66%	71%	56%
10 to less than 20%	21%	20%	16%	27%
20 to less than 30%	9%	10%	7%	11%
30 to less than 40%	2%	2%	2%	1%
40 to less than 50%	1%	1%	1%	1%
50 to less than 60%	1%	-	1%	3%
60 to less than 70%	-	-	-	-
70 to less than 80%	<1%	-	1%	-
80 to less than 90%	1%	1%	1%	-
90 to less than 100%	-	-	-	-
100%	1%	<1%	1%	1%

- The mean percentage increase for all associations is 10%. The median percentage increase for all associations is 5%.
- Of those associations who increased their membership dues, the majority increased less than 10%.
- Trade associations (27%) are more likely than individual member or combination associations to report that they increased membership dues 10% to 20%.
- Combination associations are more likely to report that they increased their membership dues less than 10%.
- Associations with 80% or higher renewal rates are more likely to report the average percentage of their last membership dues increase was less than 10% (70%).
- Associations with renewal rates less than 80% (27%) are more likely than associations with higher renewal rates to report that their last membership dues increased 10% to 20%.
- Seven in ten associations with 5,000 to 20,000 members report the average percentage of their last membership dues increase was less than 10%.

Please indicate, on average, what percentage of the membership dues are paid by each of the following. Total has to add up to 100%.

HOW MEMBERSHIP DUES ARE PAID (TOTAL)				
	Paid in full by individual member	Paid in full by employer/company	Payment split between individual and employer/company	Other
Mean	41%	54%	2%	4%
Median	34%	50%	0%	0%

- Overall, employers pay for the majority of membership dues.
- About 40% of membership dues are paid in full by individual members.
- Associations with 80% or higher overall renewal rates are more likely than associations with lower renewal rates to report that less than 10% of dues are paid fully by individual members (46% vs. 18%).
- Individual member associations with up to 1,000 members are more likely than associations with more members to report less than 10% of membership dues are paid in full by individual members (42% vs. 10%).
- Two-thirds of trade associations with more than 100 members indicate less than 10% of membership dues are paid fully by individual members, while only a quarter of trade associations with fewer members report likewise.
- Associations with less than 60% new member renewal rates are more likely to indicate less than 10% of membership dues are paid in full by an employer or company.

Please indicate, on average, what percentage of the membership dues are paid by each of the following. Total has to add up to 100%.

HOW MEMBERSHIP DUES ARE PAID (INDIVIDUAL)				
	Paid in full by individual member	Paid in full by employer/company	Payment split between individual and employer/company	Other
Mean	63%	31%	2%	4%
Median	70%	25%	0%	0%

- Almost two-thirds of membership dues are paid for entirely by individual members.
- Three in ten membership dues are paid in full by employers/companies.

Please indicate, on average, what percentage of the membership dues are paid by each of the following. Total has to add up to 100%.

HOW MEMBERSHIP DUES ARE PAID (TRADE)				
	Paid in full by individual member	Paid in full by employer/company	Payment split between individual and employer/company	Other
Mean	2%	95%	<1%	2%
Median	0%	100%	0%	0%

- Nearly all trade association memberships are sponsored by employers or companies.
- On average, only 2% of individual members who belong to trade associations pay for their own membership dues in full.

Please indicate, on average, what percentage of the membership dues are paid by each of the following. Total has to add up to 100%.

HOW MEMBERSHIP DUES ARE PAID (COMBINATION)				
	Paid in full by individual member	Paid in full by employer/company	Payment split between individual and employer/company	Other
Mean	41%	55%	2%	4%
Median	35%	50%	0%	0%

- Employers/companies pay for more than half of the membership dues.
- For combination associations, 41% of membership dues are paid in full by individual members.

How would you describe your membership dues structure?

MEMBERSHIP DUES STRUCTURE				
	Total (n = 728)	Individual (n = 340)	Trade (n = 192)	Combination (n = 183)
Everyone pays the same membership dues	26%	37%	10%	24%
The membership dues are based on certain attributes (i.e., qualifications, experience, company size, revenue, geography, etc.)	50%	38%	73%	47%
The membership dues are based on a tiered structure of increasing benefits	9%	11%	6%	11%
The membership dues are based on member-selected benefits they want to receive (à la carte)	2%	2%	1%	3%
Other	13%	13%	9%	15%

- Half of associations report membership dues structures are based on certain attributes, such as qualifications, company size, and revenue. This is especially true for trade associations.
- The membership dues structure for individual member associations is about evenly split between the same membership costs for everyone (37%) and membership dues based on certain qualities (38%).
- Associations with 80% or higher renewal rates are more likely than associations with renewal rates under 80% to have a dues structure based on specific criteria (60% vs. 31%).
- Four in ten individual member associations with 1,000 to 5,000 members indicate that everyone pays the same membership dues. Additionally, a quarter of trade associations with up to 100 members report everyone pays the same membership dues.

Does your association have chapters?

CHAPTER MEMBERSHIP				
	Total (n = 728)	Individual (n = 341)	Trade (n = 191)	Combination (n = 183)
Yes, chapter membership is optional	24%	31%	9%	28%
Yes, chapter membership is mandatory	18%	26%	7%	15%
No	56%	41%	82%	56%
Our organization is a chapter	2%	2%	2%	1%

- For the most part, associations do not have chapters. This is especially true for trade associations.
- Individual member associations that have a chapter structure are more likely to have mandatory chapter memberships compared to other types of associations (26% vs. 7% for trade associations and 15% for combination associations).
- About three in ten individual member associations and combination associations have optional chapter memberships.
- Individual member associations with up to 1,000 members are least likely to have chapters (77%).

When a member belongs to both the national association and the chapter organization, where do they send their dues payments?

WHERE DUES ARE SENT				
	Total (n = 291)	Individual (n = 187)	Trade (n = 24)	Combination (n = 76)
Total amount is sent to the chapter	10%	10%	21%	7%
Total amount is sent to the national association	68%	72%	67%	59%
Dues payments are split so that the chapter and the national offices each receive a payment	21%	18%	13%	34%

- Two-thirds of associations report that both national and chapter dues payments are sent to the national association. This is especially true for individual member associations.
- Two in ten trade associations report the total amount of dues payments are sent to the chapter.
- A third of combination associations indicate that dues payments are divided between the chapter and the national offices.

What is the responsibility of the chapter?

Check all that apply.

CHAPTER RESPONSIBILITIES				
	Total (n = 302)	Individual (n = 191)	Trade (n = 30)	Combination (n = 77)
Local networking	92%	93%	87%	91%
Local speakers/events/meetings	85%	87%	70%	86%
Local training/continuing education	72%	75%	63%	70%
Recruitment of new members	67%	70%	57%	61%
Provide association information	53%	57%	47%	47%
Forum for local suppliers/vendors to meet with members	34%	34%	43%	33%
Fundraising	21%	23%	20%	14%
Other	11%	11%	20%	8%

- Regardless of membership type, local networking and local events are the primary chapter responsibilities. This is especially true for individual member and combination associations.
- Three-quarters of individual member associations cite local training/continuing education as a responsibility of the chapter.
- Over 40% of trade associations indicate chapters provide forums for local suppliers and vendors to meet with members.

What is your organization's annual operating budget?

ANNUAL OPERATING BUDGET				
	Total (n = 700)	Individual (n = 325)	Trade (n = 186)	Combination (n = 176)
Up to \$1 million	21%	19%	23%	22%
\$1 million to \$4.9 million	35%	32%	38%	39%
\$5 million to \$9.9 million	18%	19%	22%	12%
\$10 million to \$19.9 million	14%	15%	10%	15%
\$20 million to \$50 million	9%	10%	8%	10%
More than \$50 million	3%	5%	1%	3%

- About one-third of associations indicate that their organization's annual operating budget is \$1 million to \$4.9 million.
- 15% of individual member and combination associations report that their operating budget is between \$10 million to \$19.9 million.
- Associations with a new member renewal rate of 80% or higher are more likely to have operating budgets up to \$1 million, while associations with less than 60% new member renewal rates are more likely to have operating budgets between \$10 million and \$19.9 million.
- About half of individual member associations with up to 1,000 members report operating budgets of \$1 million or less (47%), while six in ten individual member associations with 1,000 to 5,000 members have operating budgets between \$1 million and \$4.9 million.

Over the course of the past fiscal year, excluding staff costs, how much did you spend on the following membership marketing programs?

AMOUNT SPENT ON BUDGET (TOTAL)					
	\$4,000 or less	\$4,000-\$10,000	\$10,000 to \$50,000	\$50,000 to \$100,000	\$100,000 or more
Awareness and branding	36%	24%	21%	9%	10%
Recruitment	33%	21%	24%	8%	13%
Engagement/onboarding	53%	23%	14%	7%	4%
Renewals	44%	21%	20%	7%	8%
Reinstatement or win-back	68%	17%	12%	2%	1%

Membership marketing spending, cont'd.

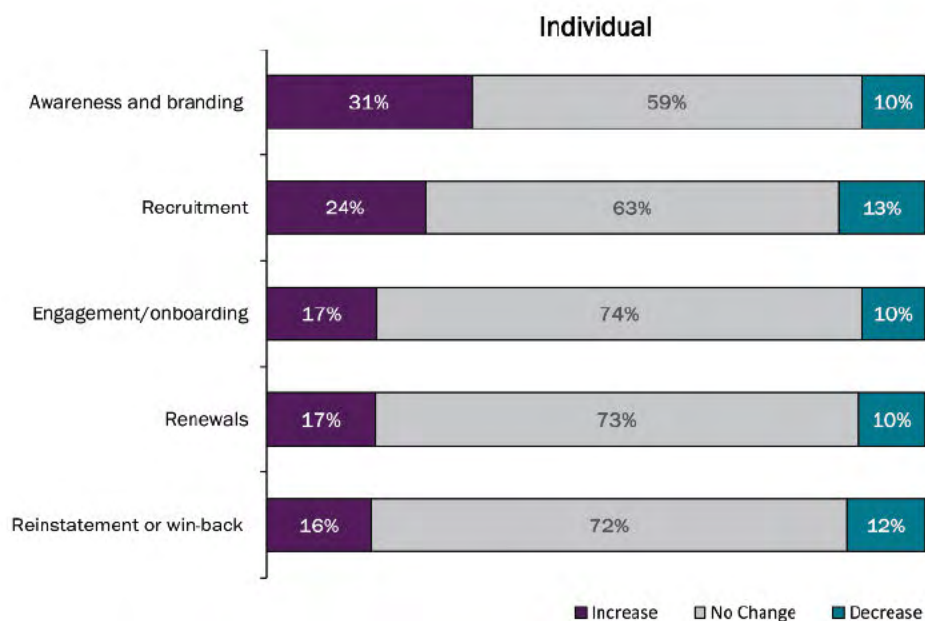
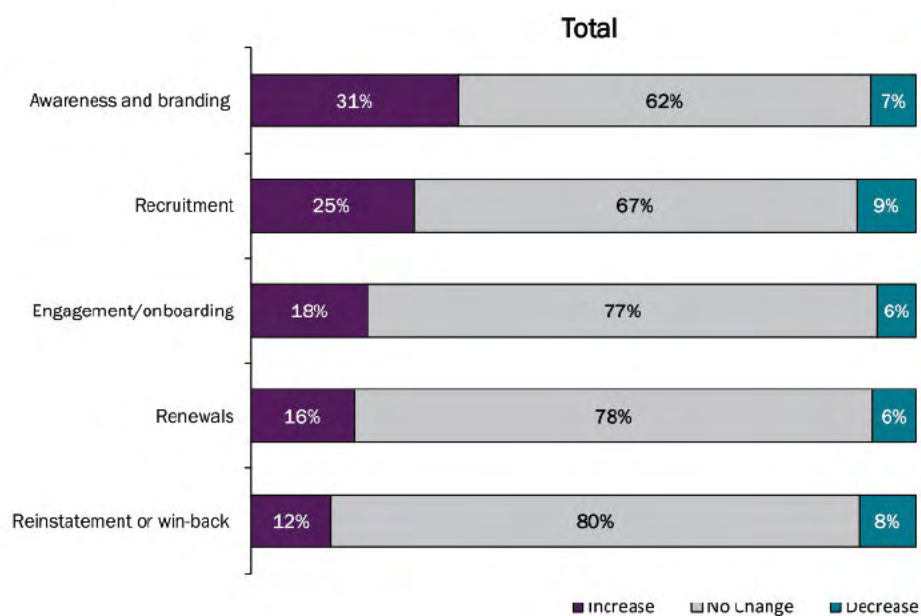
AMOUNT SPENT ON BUDGET (INDIVIDUAL)					
	\$4,000 or less	\$4,000-\$10,000	\$10,000 to \$50,000	\$50,000 to \$100,000	\$100,000 or more
Awareness and branding	37%	26%	22%	9%	6%
Recruitment	31%	20%	20%	11%	17%
Engagement/onboarding	46%	23%	17%	9%	4%
Renewals	35%	21%	24%	10%	11%
Reinstatement or win-back	63%	18%	16%	1%	2%

AMOUNT SPENT ON BUDGET (TRADE)					
	\$4,000 or less	\$4,000-\$10,000	\$10,000 to \$50,000	\$50,000 to \$100,000	\$100,000 or more
Awareness and branding	31%	23%	21%	13%	12%
Recruitment	25%	29%	34%	4%	9%
Engagement/onboarding	58%	23%	9%	5%	6%
Renewals	55%	23%	15%	3%	3%
Reinstatement or win-back	79%	13%	6%	1%	1%

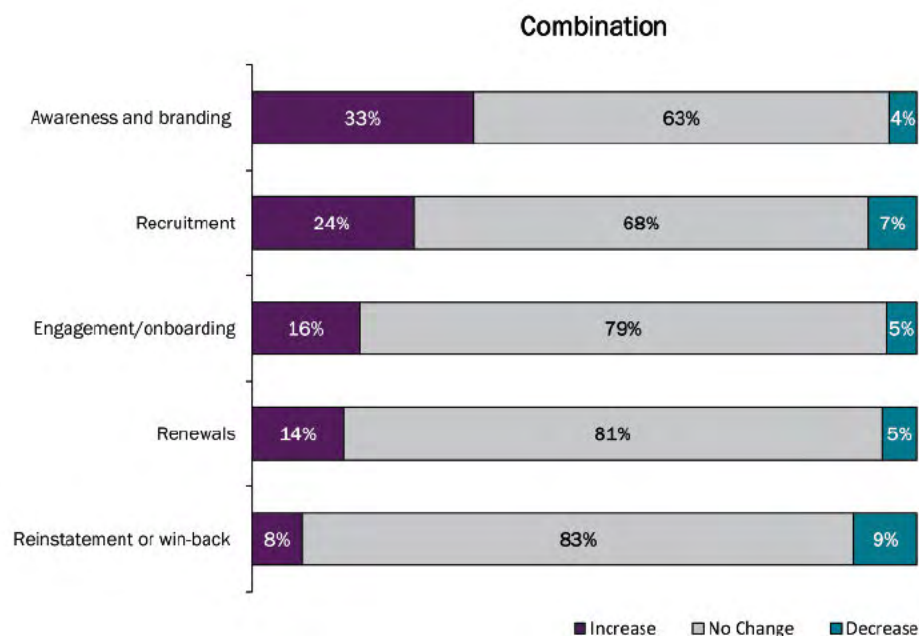
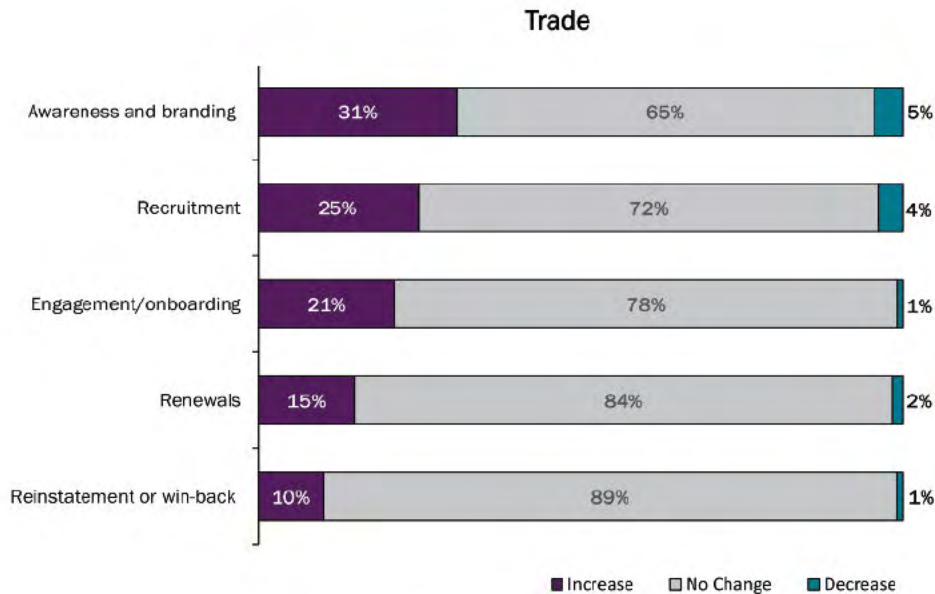
AMOUNT SPENT ON BUDGET (COMBINATION)					
	\$4,000 or less	\$4,000-\$10,000	\$10,000 to \$50,000	\$50,000 to \$100,000	\$100,000 or more
Awareness and branding	38%	24%	20%	5%	13%
Recruitment	45%	17%	21%	7%	10%
Engagement/onboarding	59%	20%	13%	6%	2%
Renewals	50%	21%	17%	4%	8%
Reinstatement or win-back	68%	18%	11%	4%	-

- Overall, more than half of associations report that their engagement/onboarding, renewals, and reinstatement or win-back programs are \$4,000 or less.
- Two-thirds of combination associations spend \$4,000 or less on reinstatement or win-back.
- A quarter of combination associations spend \$4,000 to \$10,000 on awareness and branding.
- Almost 30% of individual member associations spend \$50,000 or more on their recruitment efforts.
- One-third of trade associations spend \$10,000 to \$50,000 on recruitment efforts.
- One-quarter of trade associations spent \$50,000 or more on awareness and branding initiatives.
- More than half of associations with 80% or higher new member renewal rates spend \$4,000 or less on renewals (58%).

How did the amount of that budget change from the previous year?



Budget changes, cont'd.



- For the most part, associations have not changed their budgets for membership marketing programs in the past year.
- Three in ten associations report they increased their awareness and branding budget (31%) since the previous year.
- Trade associations are more likely to have increased costs on engagement/onboarding, while individual member associations are more likely to have spent more on reinstatement or win-back since last year.

What types of analysis do you use to measure the effectiveness of your membership marketing campaigns?

Check all that apply.

TYPES OF ANALYSIS USED TO MEASURE EFFECTIVENESS OF MEMBERSHIP MARKETING CAMPAIGNS				
	Total (n = 684)	Individual (n = 321)	Trade (n = 179)	Combination (n = 172)
Response rate analysis	54%	60%	48%	48%
Return on Investment (ROI)	29%	34%	17%	31%
Source code or Keycode capture and analysis	25%	32%	12%	26%
A/B split marketing tests	24%	31%	13%	23%
Cost of acquisition	22%	30%	13%	17%
Data mining/modeling	13%	17%	9%	10%
Lifetime value analysis	13%	17%	7%	12%
Computer matchback to prospect database	11%	14%	4%	12%
Net return after servicing costs	8%	10%	2%	9%
Other	3%	3%	6%	1%
None	28%	21%	38%	32%

- Response rate analysis and return on investment (ROI) are the two top methods for measuring membership marketing campaigns.
- Across all association types, the bulk of associations use response rate analysis to measure the effectiveness of membership marketing campaigns.
- Over 30% of trade and combination associations do not use analysis to measure the effectiveness of their membership marketing campaigns.
- Individual member and combination associations are more likely to use a source code or keycode capture and analysis.
- Associations with more than 1,000 members are more likely to use response rate analysis or return on investment (ROI) to measure the effectiveness of their membership marketing campaigns.
- Associations with smaller operating budgets (up to \$1 million) are more likely to forgo analysis to determine the effectiveness of their marketing campaigns.
- Individual member associations with 5,000 or more members are more likely than smaller associations to use data mining/modeling (21% vs. 7%) or computer matchback (22% vs. 5%) to prospect databases.

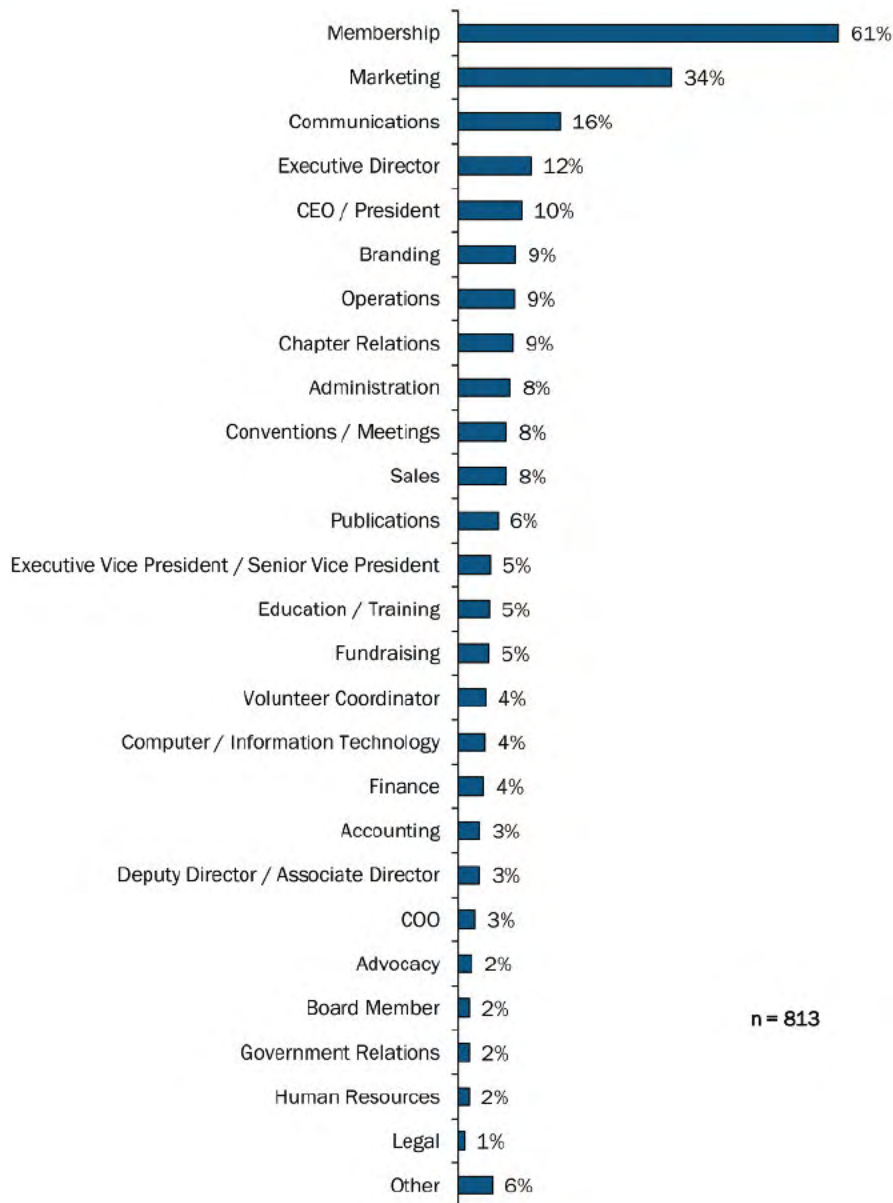
What association management software (AMS) do you use?

MOST COMMON ASSOCIATION MANAGEMENT SOFTWARE				
	Total (n = 702)	Individual (n = 328)	Trade (n = 185)	Combination (n = 177)
iMIS (ASI-iMIS)	18%	20%	18%	14%
Avecetra Inc.	12%	12%	12%	11%
Personify	7%	10%	2%	6%
YourMembership.com	6%	6%	6%	6%
Microsoft CRM	5%	4%	8%	6%
Home Grown or tailor-made system	4%	4%	5%	3%
SalesForce	4%	1%	8%	5%
ACGI Software	3%	4%	1%	3%
Aptify	3%	4%	2%	4%
MemberClicks	3%	4%	2%	2%
Microsoft Excel	3%	2%	3%	4%
Euclid Clear Vantage	2%	1%	3%	2%
CiviCRM	1%	-	2%	2%
ISSI (Impak)	1%	1%	1%	2%
Microsoft Access	1%	1%	2%	1%
Protech	1%	2%	2%	1%
Timberlake Software	1%	<1%	-	1%
Wild Apricot	1%	1%	1%	1%
CDC gomembers	<1%	-	-	1%
Affiniscap	-	-	-	-
Other	25%	24%	23%	27%

- Across all association types, the bulk of associations use iMIS (ASI-iMIS; 18%) or Avecetra Inc (12%).
- Individual member associations (10%) are more likely than trade (2%) and combination (6%) associations to use Personify.
- Trade associations (8%) are more likely than individual member (1%) and combination (5%) associations to use Salesforce.

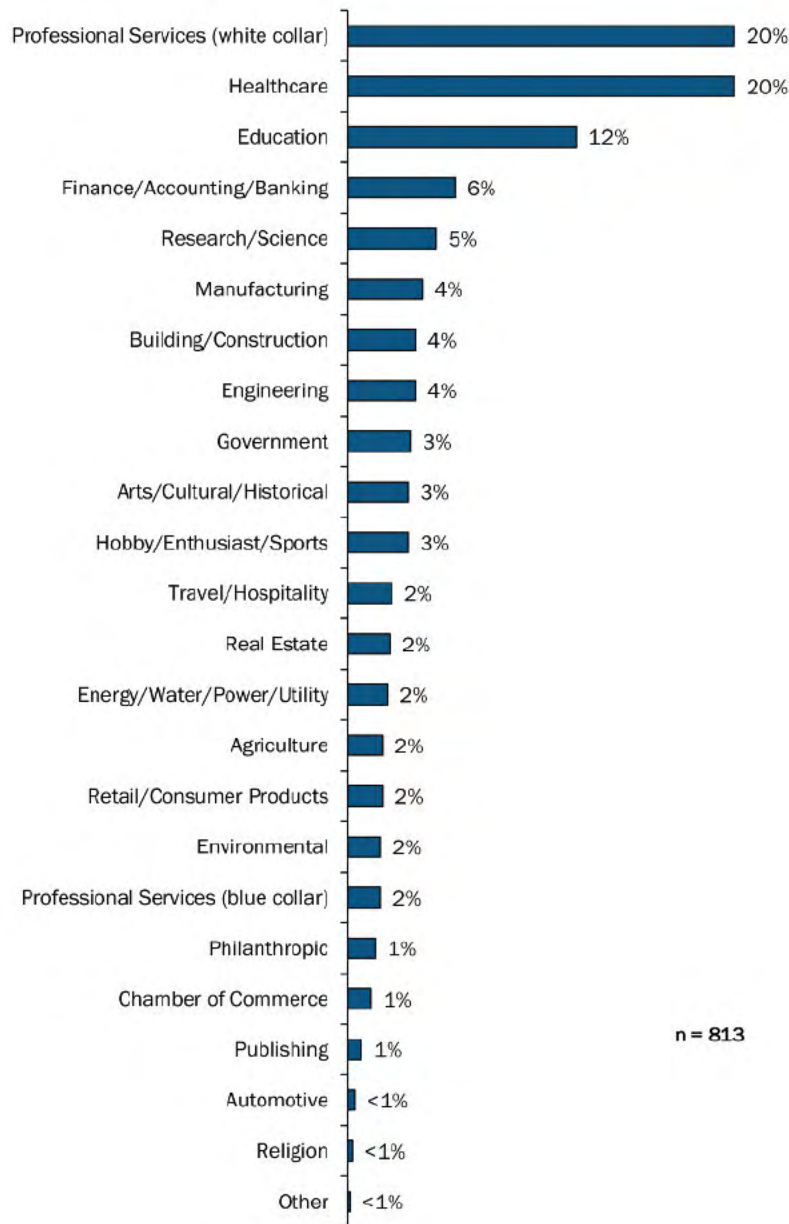
What best describes your personal job function?

Check all that apply.



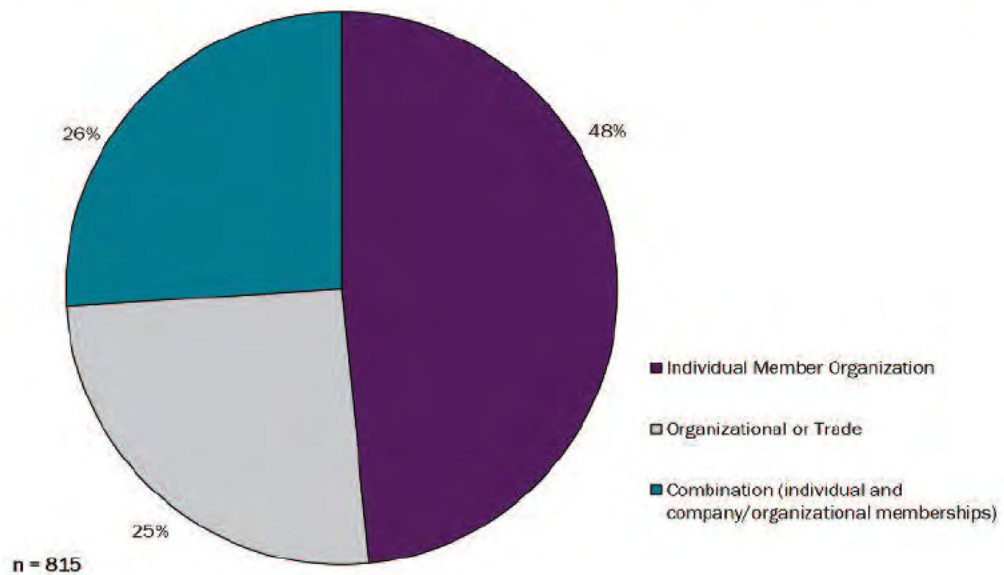
- Similar to the previous studies, the majority of respondents have roles in either membership (61%) or marketing (34%) for their association. However, it is evident from the chart, that it is common for respondents to wear “multiple hats” within their organization.

What best describes your association's industry?



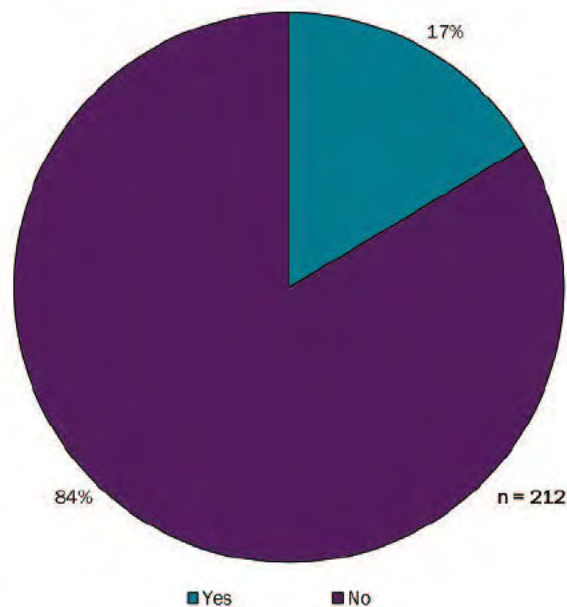
- The industries most often represented in this year's study include white collar professional services and healthcare (both 20% of the sample). These industries were most represented in the 2015 study as well, however, healthcare associations made up a larger percentage of the sample last year.
- Education comes in as the third most commonly represented industry (12%), similar to previous research.

What type of membership offering best describes your organization?



- Almost half of the participating associations are individual member organizations (IMOs).
- The percentage of trade organizations and combination organizations is about evenly split, each representing about one-quarter of the sample.

Has your association made a change to a combination membership within the past year?



- Of the associations that identify as combination associations, 17% have made this distinction within the past year.

How many paid members are in your association?

NUMBER OF PAID INDIVIDUAL MEMBERS			
	Total (n = 793)	Individual (n = 382)	Combination (n = 208)
None	28%	6%	8%
Less than 1,000	14%	8%	31%
1,000 to less than 5,000	21%	28%	26%
5,000 to less than 20,000	22%	33%	22%
20,000 or more	16%	25%	13%

NUMBER OF PAID COMPANY/GROUP MEMBERS			
	Total (n = 799)	Trade (n = 204)	Combination (n = 206)
None	44%	3%	10%
Less than 1,000	40%	64%	65%
1,000 to less than 5,000	13%	28%	18%
5,000 to less than 20,000	3%	4%	6%
20,000 or more	1%	1%	2%

- One-third of individual member organizations report between 5,000 and 20,000 members, whereas combination associations are most likely to report they have less than 1,000 individual members.
- One-quarter of individual member associations have over 20,000 members.
- Of the trade and combination associations, close to two-thirds of each report having less than 1,000 company/organizational members. However, almost three in ten trade associations report having between 1,000 and 5,000 organizational members, compared to only 18% of combination associations with memberships that large.

If you could freely say anything to your members, what would you say?

- The only way your organization will survive is if you work together to help recruit and retain members. Come together to create a more inclusive community of your peers, and don't participate just for yourself. (Combination)
- We love the opportunity to solve your problems. (Other)
- Engage with your association to ensure that you maximize the value that we can deliver. (Trade)
- If you would just DO SOMETHING with all the great content we give you (especially our done-for-you content), you'd make back 100 times your membership dues. As the famous line in Jerry McGuire goes: "HELP ME HELP YOU!" (IMO)
- Simple: Membership is not passive. You only get what you put into it. Not about a list of bulleted benefits. (IMO)
- Please read what we send you and get to know your benefits. You're paying dues for access to these benefits which are designed to help you both professionally and personally—shame on you if you ignore them. (Trade)
- No other organization represents you at the state level than our professional organization. Even your employer doesn't always have your best interests in mind. We represent your profession, and will always do what is best for you as a professional. Your world would look and operate much differently if your professional organization didn't exist. (IMO)
- Please understand the symbiotic relationship between our admission rates and membership rates. Our rates are based on the fee being recouped [at current admission fees] in two visits for most people. If you don't plan to come two or more times then a membership isn't right for you, but if you do then the cost analysis speaks for itself. Please don't send ranting emails about the rising cost of membership; we increase rates every two years and always give members a heads up to renew at the "old" rate. A member with 8 children screaming at us about the "unreasonable" cost isn't going to get you a 50% discount. (IMO)
- We are the best deal in the industry for the benefits received based on the cost of membership. If you only take advantage of half of what we offer that's the equivalent of 250% ROI. Who doesn't want that kind of return? (IMO)

With regard to your association, what keeps you up at night?

- We are a 117-year-old organization and we need to revitalize our organization. We must do this and it will be difficult both in changing revenue streams, budget impact in the short term and making decisions regarding long time staff that have outlived their skill set within the organization. (Trade)
- Understanding what value a member wants from the organization—traditional networking, professional development and sense of simply belonging is being replaced by a pay as you go attitude and fee for service which is difficult to fund. (IMO)
- How to engage younger potential members. (Combination)
- Not having a clear strategic plan. (IMO)

Words of Wisdom, cont'd.

-
- Trying to think of ways to grow our membership numbers (number of members and revenues). We seem to hit plateaus every once in a while and just can't break through. For example, we've been stuck between 185–195 members for about six months now. For every member we gain, we lose one. Can't seem to break 200 and stay there. (We've broken it twice in six months, but quickly dropped back.) (IMO)
-
- The board members' inability to focus on this organization. They tend to inflict their own organizations' needs and concerns on our organization. The result is they have a difficult time acting as a group and miss good opportunities due to lack of consensus. (Combination)
-
- We just implemented a new strategic plan and have hired an entirely new staff. Am I as the executive director providing the right direction, resources, autonomy for these new people to flourish in their jobs while meeting association objectives? (Trade)
-
- Our members work in a highly stressful position (teaching). I worry that with budget cuts, decreasing support for professional development by administrations, and other factors, teachers will choose to forgo the cost of membership for other more pressing needs. (Combination)
-
- Losing members due to industry consolidation, getting beyond the gatekeeper into the bowels of the company to find our most engaged and active advocates. Staying relevant with something members can only get from us. (Trade)
-
- Lack of overall strategy for the direction of the Association. Amount of time spent on day-to-day stuff rather than higher end strategic thinking and planning. Lack of solid member engagement, retention and recruitment strategies. Lack of resources to accomplish goals and grow the membership. (Trade)
-
- We need a better membership management system which will allow us to better understand our membership trends and allow better reporting so we can develop a strategic plan. (IMO)
-
- Declining membership. How to build (and show) value to our members. How can we reach the millennials and show them the importance of belonging to their professional organization as well as the importance their education and expertise affect each and every one of their patients. Additionally, we have an aging membership demographic—how do we engage with those who are close to retirement and show them the importance of continuing as a member (networking, mentorship, affinity program options, etc). (Combination)
-
- Aging membership. Many retiring each year. Ceramic engineering as a degree program only exists at two universities as the materials science curriculum changes. How to better engage our international members, who often cannot travel to attend our mostly US-based conferences. How to increase retention rate. (Combination)
-
- Inadequate staffing (not having the right people in the jobs), unsustainable business plan, too many events compared to the ability of staff to support them, lack of analytical thought, lack of specialized knowledge on staff, too much of doing things the same way we've always done them, budget challenges, a governance process that's out of pace with the real world (IMO)
-

If there was one hurdle you could remove to make your association run smoother, what would it be?

-
- The lack of accountability. So many of our employees don't necessarily see the work they are doing as having a direct impact on the membership, yet it does. If more of the employees could be more accountable for their work and be more responsive to staff that work with the members, we could get a lot more done. (Combination)
-
- Conservative thinking—living in the past. (Trade)
-

-
- Less silos—more communication between teams and more collaboration. (Combination)
-
- Fewer problems with payment integration! We use Wild Apricot and PayPal for our recurring payments and there are at least 2 members a month who have a problem with their renewal in PayPal. Ugh. (IMO)
-
- Membership structure combining organizational and individual membership creates an extra level of administrative work. Simplifying to just an individual basis would help with efficiency. (Combination)
-
- Conflicting priorities. Our marketing efforts are heavily reliant upon our digital technologies. Competing priorities often delay campaign implementation because we are in a holding pattern for the technical side of the campaign. (IMO)
-
- Lack of trust. So many of our members have trust issues with us or one another or the very ground they stand on. I would love it if people could get past the small talk and really tell me what troubles them and what they need, because I truly think we can fix a lot of those problems for them. But people won't open up and admit they're struggling, or won't listen to our advice, or think we have some ulterior motive. (IMO)
-
- Unrealistic expectations, and the barriers between the two key sides of our membership. (Trade)
-

In your own words, what are the most important or successful lessons you have learned in the area of membership marketing?

-
- Members are people too. They appreciate being paid attention to and knowing that we care about them and their business. A lot of times, a little can go a long way so I don't hesitate to say yes when I can if a Member asks for help. I try to go above and beyond. Exceptional service and consistent care are noticed and appreciated. (Trade)
-
- Understand behaviors and watch for trends or changes. Know your certificants, what they do and what they need...how they feel about their profession. As a staffer, value input from frontline customer service—they are the life/face/voice of the organization. No matter your leadership role, get on the phones every so often yourself to understand certificant and staff needs. We are lucky that our C-suite stays in touch with certificants in some way, often conferences. It's refreshing. (Combination)
-
- It's important to understand what the needs of members are before developing a product for them. Market research please. 2. One size doesn't fit all—we need to change. Millennials do not want to pay for what they don't NEED. 3. Organizations need to be agile—bureaucracy kills! (IMO)
-
- Done right—direct mail for membership marketing is awesome! (IMO)
-
- Always start with understanding, at a deep level, the unspoken needs. Always focus on the member experience. Never stop experimenting and learning. Never undervalue or discount unnecessarily. Always aim high and stretch. Word of mouth will always be the most powerful message. Find ways to engage your members in spreading the word—without offering a monetary incentive. (IMO)
-
- Be comfortable regularly assessing and adapting the value proposition of membership. The needs of members are not static. Utilize the many tools and channels to assess what members want and need — what are they buying, reading, opening, attending? Are they sharing association communications with others? Are they engaged as volunteers? Conducting formal feedback and research is essential. Share these findings with staff colleagues. Last, Association staff are not the best sources of what members need and want. Members are. (IMO)
-
- You have to tell them your message multiple times before they start to get it and use a variety of media. People are so distracted by the glut of information available and they don't have time to read it and process it all so you can't assume that they'll read your one communication. (Trade)
-

Words of Wisdom, cont'd.

- Emotion drives sales. Messages have to be honest, sincere, not sales pitchy, and show value. Show them how they can't afford NOT to join your organization. (Combination)
- To stop listing off all of the specific programs that our organization does to current and potential members. Instead focus on relaying how what we do will help them. They need to know that membership will help them in their career and not that they will have access to X number of tools. (IMO)

In your professional opinion, how do you think associations will change or evolve to maintain their relevance over the next decade?

- Associations will need to cater more to the a la carte option. They will need to both provide various membership levels as well as a wider variety of offerings. Exclusivity is no longer what members want. They want their association to be their one-stop shop for everything, and if it isn't they don't want to pay for all of it. (Combination)
- I think we're going to need to remind prospects/members of the reason associations exist. I worry that the younger folks coming into our industry are not "joiners". Somehow we're going to have to convince them of the relevance of joining or adapt our mission to better serve them in another capacity. (Trade)
- Associations will need to find services that cannot be provided by any other organization—such as professional credentials. Networking can be online and social, professional development can be searched online, knowledge is not valued as information can be easily gathered but status can only be gained by peer review and credentials are important. (IMO)
- Through a continuing push toward invisible leadership accompanied by disintermediation—guiding the staff and volunteer leaders to “motivate and coach and mentor and guide” members to do things for themselves! (IMO)
- They will have to focus more on the value added stuff; what they can provide to members that is not already on the web. They will have to be more emotionally driven so that members stay in membership despite the lack of tangibles (because they feel part of the network and agree with the overall mission). (Trade)
- I believe we may have to become more savvy in digital communications and make sure we're communicating and providing benefits/value in ways that are easily accessible and digestible to members on the go. Our members have more distractions and busier schedules than ever before and the organization's job is to evolve so that the benefits it offers are accessible on the go and meet the members' changing needs (think: mobile/digital accessibility; tiered membership structures). (IMO)
- If your membership organization is predicated upon deep involvement then the association team needs to be deeply involved. Customer service, however it is defined for a specific association, is paramount! Content and tools are widely available on-line. To be competitive, human interaction and person-to-person support is critical...and expensive. (IMO)
- They must compete for a very limited amount of available volunteer hours—that will mean increasing staff or decreasing services—it will be interesting. Value must be visible to members or they will not join or renew. (Trade)
- I think associations are going to have to get more local. People want to be connected to something bigger than themselves. If you can't hold certification over someone then you have to give real, direct value. That will bring more and more associations to focus on local markets, in-person gatherings, community. (Trade)



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ABOUT MARKETING GENERAL INCORPORATED

Marketing General Incorporated is the nation's largest marketing agency working exclusively with membership associations. During the past 38 years, MGI has helped hundreds of associations and relationship-based organizations increase their membership, improve retention, enhance member engagement, grow revenue, and gain new insights through market research and analysis. Additional information can be found at www.MarketingGeneral.com or by contacting us at 703.739.1000.

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Erik Schonher is Vice President of Marketing General Incorporated. He is well known throughout the association industry as an experienced strategic planner and a seasoned tactician who is renowned for thinking "outside the box" to develop membership acquisition, engagement, and retention programs. He has developed hundreds of comprehensive programs for many individual member and trade associations. A sought after speaker for ASAE events including the Annual Conference, MMCC, and Great Ideas, he is the author of many professional articles and white papers on membership marketing and regularly hosts webinars and meetings that examine membership marketing best practices, research and analysis, and communication theories.

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