



Association Adviser

2014 ASSOCIATION COMMUNICATIONS BENCHMARKING REPORT

THE DEFINITIVE ANNUAL REPORT ON BEST PRACTICES AND PEER BENCHMARKING EXCLUSIVELY FOR THE ASSOCIATION COMMUNITY

NAYLOR 
ASSOCIATION SOLUTIONS

Conducted by Naylor, and the Association Adviser in partnership with the Association Societies Alliance

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EXECUTIVE SUMMARY

Naylor is more committed than ever to helping associations identify and address the member communication issues they face every day. With the 2014 acquisition of Boxwood Technology, Naylor is now in continuous contact with more than 1,500 trade and professional association clients. This gives us an even broader perspective on the community's ongoing needs. Communication effectiveness – or lack thereof – continues to be one of those clearly identified needs.

Since 2010, Naylor has partnered with Dr. M. Sean Limon of the University of Florida's Warrington College of Business Administration and numerous state societies of association executives to identify and deconstruct the top communications concerns cited by North American trade associations and professional societies. Our benchmarking study highlights the results of the different methodologies associations use to tackle these member communication challenges. In 2011, we learned that many associations were operating in silos and believed they were doing a better job of integrating their communications programs than they actually were. In 2012-'13*, we discovered that associations greatly underestimated the degree to which overload and communication clutter were preventing them from reaching their members. In 2014, we have found that associations who are integrating their communications are also more effectively engaging their members with better content and through a better understanding of reader/member/advertiser needs. Yet less than 11 percent of associations have fully integrated communications strategies.

On the bright side, our research and interviews with association executives show that most associations are well aware of their communication challenges and most are taking steps to address them. The size (and courage) of those steps can vary greatly, but most associations are attempting to adapt to the fast-changing media consumption habits, preferences and expectations of their members. For example, when asked what they would do if their publishing/content creation teams received an unexpected 50 percent increase in the annual budget, about one-third (33.8%) told us they would "develop a real mobile strategy" and another third (30.8%) said they would "put a lot more muscle behind their social media."

What's more, nearly half of associations (44.0%) report they have integrated video into their communication strategies and one fourth of respondents (24.1%) said they plan to integrate video in the near future. On another positive note, our research finds that nearly half of associations (48.2%) have optimized their websites for mobile and more than one third (33.7%) have optimized their e-newsletters for mobile.

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

The 2014 Communications Landscape

Whether you're new to the association world or a lifelong association professional, there's never been more pressure on organizations to find ways to cut through the cluttered communication landscape and to remain top of mind with members – and prospective members. Economic, demographic, technological and social factors are making it increasingly challenging for North American trade associations and professional societies to recruit and retain members and to maintain their position as the trusted thought leaders in their industries. This report assesses the current communications landscape by examining the results of Naylor's 2014 Communications Benchmarking Survey. It identifies patterns and trends in how associations manage their communications and compares communications department budgets and staff sizes for small, medium and large associations.

Our research shows that associations of all sizes, industries and operating budgets are communicating with members more frequently and in more ways than ever. Unfortunately, our study shows that they're communicating even less effectively with members than they were as recently as three years ago. For instance, nearly 71 percent of the 1,031 association leaders who responded to this year's survey believed their members ignored at least half of the communication pieces sent to them regularly. That's 8.8 percentage points higher (i.e., worse) than what respondents told us in 2011. What's more, only 36.4 percent of associations believed their communication efforts improved significantly from three years ago. Finally, only about half of associations (52.6%) self-rated their member communications "above average" or "best in class" relative to their peers.

	2011	2014	% Change
Rate own communications "above average" or "best in class" relative to peers	58.5%	52.6%	-5.9%
Believe communications have significantly improved from three years ago	45.8%	36.4%	-9.4%
Believe members ignore at least half of what the association sends them	62.0%	70.8%	+8.8%

N = 674 in 2011; 1,031 in 2014 Source: Association Adviser and Naylor 2014

*Please note: rounding errors <> .1% may occur

Gaps to fill

There is a big disconnect between associations' willingness to try new forms of communication and their willingness to adequately staff and financially support them. When answering the "increased budget" question (which allowed for multiple answers), 47 percent of respondents said they would upgrade their publishing tools, technologies and processes and 54 percent said they would improve the quality of existing communication vehicles, but only 44 percent told us they would increase staffing. This was a surprise to researchers in light of the fact that nearly three in five associations (57.0%) have just one full-time staff member (or less) devoted to publishing/content creation. By comparison, the percentage of associations with between two and five full-time staff members on their publishing/content creation teams

decreased to 35.3 percent in 2014, from 42.7 percent last year. While the percentage of associations with six-plus full-time staff members on their publishing/content creation teams rose slightly to 7.8 percent in 2014 from 5.6 percent the previous year, it is still lower than the 8.5 percent level reported in 2011 – a time when the U.S. was just emerging from a punishing recession.

While approximately two-thirds of associations (65.5%) claim to have an integrated communications strategy in place, it appears association communications have become less integrated – not more – since we last asked this question in 2011. Among the one-third of associations (34.5%) that told us they do not have integrated communications, 9.7 percent expect to within the next 12 months. As shown in Appendix 1, the lack of an integrated communications platform can have profound, adverse consequences for a membership organization.

	2011	2014	% Change
Associations with fully integrated communications	20.4%	10.5%	-9.9%
Associations with “ somewhat integrated ” communications	50.4%	55.0%	+4.6%
Integrated communications to some extent	70.8%	65.5%	-5.3%
Not integrated but plan to	9.9%	9.7%	-0.2%

N = 524 in 2011; 842 in 2014 Source: Association Adviser and Naylor 2014

Another concern for researchers was the fact that only half of associations (52.6%) regularly ask their advertisers and sponsors if they feel they’re getting their money’s worth from their association involvement. Of the associations that do ask, three in five of them (59.9%) incorporate the feedback they get from advertisers and sponsors into their pricing considerations – down from 62.3 percent in 2011. Researchers wondered if some associations were neglecting to ask members and suppliers about the continuing value of their legacy communication channels in this mobile, social, digital age. As Section 4 of this report reveals, live events, print magazines, print directories and traditional e-newsletters continue to be among the highest-rated association communication channels.

Communications Strategy Recommendations

So, how do resource-challenged associations learn to communicate more effectively with time-pressed, media-saturated members of all ages? How do they do so on each member’s preferred terms? How do they customize their offerings to appeal to each member subgroup without becoming overextended? How do they measure progress (or lack thereof) and invest their resources more appropriately to mesh with member preferences?

This report offers actionable recommendations for associations of all sizes to help them access, integrate and measure their communications practices in order to better engage their members and grow their membership base. It also provides compelling statistics that demonstrate that associations with carefully segmented and well-integrated communication programs are able to recruit, retain and engage members more effectively than organizations that don’t. (See Appendix 1).

We also offer numerous recommendations at the end of the report. (You can review them now by turning to Section 5.) Use them as food for thought to help guide your evaluation of your association's communications. Once you recognize the strengths and weaknesses of your current communications program you can begin to optimize your efforts, doing more of what works and less of what doesn't. The recommendations also provided guidance on when to seek assistance and who some of your best untapped resources might be.

About Association Adviser

The ***Association Adviser*** communications brand delivers best practices, news and leadership strategies to association executives and their staffs. Through the weekly blog articles, monthly eNewsletter, annual magazine, online video channel (Association TV) and our annual benchmarking study, we reach thousands of association professionals across hundreds of industries. Join us online at www.AssociationAdviser.com.

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