

10th
ANNIVERSARY
EDITION

MARKETING
GENERAL
INCORPORATED™

2018 **MEMBERSHIP MARKETING** **BENCHMARKING REPORT**

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Dear Colleague,

This is the 10th year for Marketing General Incorporated's **Membership Marketing Benchmarking Report**. You have in front of you an incomparable marketing research tool!

After 10 years and all of the ensuing changes in the world of membership associations and organizations, this is as longitudinal a report as can be found anywhere on the strategies and tactics that membership organizations from the US and from around the world use to recruit new members, engage and renew those members, and reinstate lapsed members.

This year, 821 unique associations participated in the survey including Individual Member Associations, Trade Associations, and Associations combining characteristics of both. My thanks to all of them.

As always, in addition to the pages of actual survey results, it is really worth reading the answers to the open-ended questions. This is where our respondents share their thoughts and professional 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.

How have the *Membership Marketing Benchmarking Report* findings changed over the last ten years? After the drastic declines in membership in 2009 and 2010, the trend is certainly more positive.

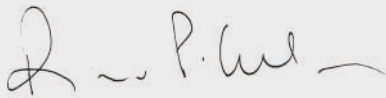
Membership organizations now pretty consistently report year-over-year growth.

While communication methods and best practices have certainly changed over the past ten years, each type of organization has adopted those changes to best meet their goals and objectives.

This report represents the combined efforts of our research and creative teams, individually listed on the back cover. All of us at MGI hope that this report helps you gain increased knowledge and understanding of this ever-evolving profession of ours that knits together people and communities around the world.

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

Sincerely yours,



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EXECUTIVE SUMMARY

“I can't change the direction of the wind, but I can adjust my sails to always reach my destination.” - Jimmy Dean



We are pleased to present the 2018 Membership Marketing Benchmarking Report.

This is the TENTH ANNIVERSARY EDITION of this research, so it is a great opportunity to look back over the ten years to see how membership marketing for associations has both remained constant and has changed.

The theme of this tenth anniversary edition highlights the evolution in how associations go to market as they seek to recruit and retain members and how remarkably associations have adapted to changes to remain strong and vibrant. In fact, the data over the years highlights that association membership continues to show growth and staying power.

2018 REPORT HIGHLIGHTS

HERE ARE SOME HIGHLIGHTS FROM THIS YEAR'S DATA

Results show an uptick in the percentage of associations reporting increases in membership over the past year (48% vs. 46% in 2017). Similar to 2017 findings, only 25% of associations report declines in membership in the past year, and about one-quarter report no change (26%).

MEMBERSHIP CHANGE IN PAST YEAR				
	Total (n = 819)	Individual (n = 379)	Trade (n = 241)	Combination (n = 199)
Increased	48%	47%	52%	44%
Decreased	25%	29%	19%	24%
Remained the same	26%	23%	28%	30%
Not sure	2%	1%	2%	3%



EXECUTIVE SUMMARY

For associations reporting increases in membership over the past year, **the median increase is a very respectable 5%.**

PERCENTAGE INCREASE IN MEMBERSHIP OVER PAST YEAR				
	Total (n = 379)	Individual (n = 174)	Trade (n = 122)	Combination (n = 83)
Mean % Increased*	8%	8%	6%	9%
Median % Increased	5%	5%	5%	5%
Increased 1% to 5%	59%	57%	62%	57%
Increased 6% to 10%	21%	19%	23%	24%
Increased 11% to 50%	20%	24%	15%	18%
Increased more than 50%	1%	1%	-	1%

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

Additionally, **more than half of all associations report increases in membership totals over the past five years (53%).** Trade associations are most likely to report increases (56%), compared to IMOs (52%) and combination associations (51%).

CHANGE IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 809)	Individual (n = 373)	Trade (n = 239)	Combination (n = 197)
Increased	53%	52%	56%	51%
Decreased	29%	31%	23%	31%
Remained the same	14%	13%	18%	12%
Not sure	4%	4%	3%	7%

QUICK STAT

NEW MEMBER RECRUITMENT continues to be the driver for growth in membership counts.



At 47%, almost half of associations also report increases in new member acquisition over the past year.

Only 12% of associations indicate their new member acquisitions have declined in the past year, and 35% indicate there is no change in their new member acquisition numbers. New member recruitment continues to be the driver for growth in membership counts.

CHANGE IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 785)	Individual (n = 367)	Trade (n = 228)	Combination (n = 190)
Increased	47%	45%	50%	45%
Decreased	12%	13%	12%	10%
Remained the same	35%	34%	34%	37%
Not sure	7%	8%	4%	8%

The median renewal rate reported this year is 84%, and 68% of associations report renewal rates of 80% or higher. At 89%, trade associations have the highest median renewal rate. IMOs and combination associations have similar renewal rates; both show renewal rates around 80%

OVERALL MEMBERSHIP RENEWAL RATE				
	Total (n = 649)	Individual (n = 283)	Trade (n = 202)	Combination (n = 164)
Mean	81%	78%	88%	78%
Median	84%	80%	89%	81%

Finally, we continue to see the benefits of associations that effectively reach out to younger members.

Associations with increases in their one-year membership and five-year membership numbers are significantly more likely to have a higher percentage of millennial members. IMOs reporting declines in their membership over the past five years are significantly more apt to report a higher percentage of Baby Boomer members.



A DECADE OF MEMBERSHIP GROWTH

In looking back over data from the last ten years, it is significant to note that the 2018 key membership statistics mirror the resiliency that associations have reported over this period, perhaps challenging those who have prophesized the imminent demise of the association membership model.

MEMBERSHIP CHANGE IN PAST YEAR (TREND)				
	Increased	Decreased	Remained the same	Not sure
2018	48%	25%	26%	2%
2017	46%	25%	28%	1%
2016	49%	22%	27%	1%
2015	46%	24%	28%	2%
2014	53%	27%	16%	4%
2013	52%	31%	16%	1%
2012	52%	29%	16%	3%
2011	49%	34%	16%	2%
2010	36%	48%	14%	3%
2009	45%	35%	16%	N/A

With the exception of the latent impact caused by the economic downturn of the Great Recession, the trend of associations reporting an increase in membership counts has been remarkably consistent over the past ten years. Around half of associations show solid membership growth during this period.

CHANGE IN MEMBER RENEWAL RATE OVER PAST YEAR (TREND)				
	Increased	Decreased	Remained the same	Not sure
2018	27%	24%	42%	7%
2017	25%	23%	44%	8%
2016	24%	26%	44%	6%
2015	22%	24%	44%	9%
2014	31%	27%	36%	7%
2013	35%	31%	30%	4%
2012	36%	22%	33%	10%
2011	32%	24%	37%	7%
2010	21%	44%	27%	8%
2009	22%	31%	39%	N/A

Similarly, a large proportion of associations have reported very stable renewal rates over the past ten years. Again with the exception of the years around the Great Recession, associations have reported that their renewal rates have either “remained the same” or “increased” over the past ten years.



CHANGES IN MEMBERSHIP MARKETING METHODS

Even with the stable growth in membership counts and the maintenance of membership renewals, the methodology and focus of how associations have accomplished their goals has evolved and changed over the past ten years. The channels that associations use in membership recruitment and engagement show the most significant change. **Payment options have become more sophisticated and automated. But sadly, despite more computing power than ever, the use of data and data analysis has shown almost no forward movement over the last number of years.**

Here are some of the MAJOR CHANGES associations have put in place in their membership marketing efforts.

- In 2009, 46% of participants said that direct mail was the most effective membership recruitment channel. **By 2018, word-of-mouth recommendations, email marketing, and promotions to/at your association's conferences or trade shows are affirmed as the most effective recruitment techniques.**

Direct mail is cited only by individual membership associations as one of the top three recruitment channels.

- One recruitment channel that has seen recent growth in reported effectiveness is paid digital marketing.** For 2018, 17% of individual membership associations and 12% of all participants consider digital marketing to be one of their most effective channels for acquiring new members. The associations that use digital marketing effectively note that paid Facebook advertising and remarketing (using Facebook, AdRoll, Google) are the most effective methods (68% and 49%, respectively). This digital channel was almost invisible in our research until 2015.
- When it comes to fulfilling new memberships, for 2018, only **44% of associations report sending a mailed welcome kit to onboard new members.** This is down from 51% in 2017

and significantly down from 83% ten years ago in 2009. Also in 2009, 53% of associations mailed a membership card or certificate to onboard new members, and in our latest research this has declined at a somewhat slower pace to 43% of associations.

- Overall, association executives are most likely to say that members join to network with others in their field (58%), and learn best practices in their profession (26%).** In 2009, the top reason to join was access to specialized information. To learn best practices in the profession was the fifth reason given for joining in our 2009 research with only 8% offering this reason.
- There now appears to be a deeper understanding of membership retention than in the past.** In 2009, the top reasons cited for non-renewal were membership dues were too expensive and the employer was no longer paying dues. **For 2018, lack of engagement with the organization is the most commonly cited reason for non-renewal.** In fact, 37% of associations list this as a top reason, and the majority of associations (62%) report that they have a tactical plan to increase member engagement.

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QUICK STAT

Over half of **INDIVIDUAL MEMBERSHIP ASSOCIATIONS** report increases in participation in the following areas: public social media (73%), private social network (59%), young professional program (54%), attendance of their webinars (52%).

- By 2018, Facebook and Twitter are almost ubiquitous as the most popular social media platforms used across each type of association. Facebook is officially used now by 93% of associations, and Twitter is used by 89% of associations. This compares to 75% of associations using the Facebook platform in 2010 and only 66% of associations using Twitter in 2010. At the same time, associations offering listservs have dropped from 24% in 2010 to only 9% in 2018.
- In our 2010 research, only 22% of associations reported offering automatic annual credit card renewals. This payment method has expanded over the years. **Automatic annual credit card renewals are especially popular among IMOs**, with 45% making this option available.
- Associations' use of **Automatic Annual Electronic Funds Transfer (EFT) with renewals has increased** over the years from 10% in 2010 to 17% in 2018.
- In 2009, 17% of associations used a Fax as part of their renewal efforts. By 2018, **only 1% of respondents report that a Fax was a top renewal marketing channel**.
- The length of time associations continue to reach out to lapsed members with reinstatement efforts has expanded. In 2009, 21% of associations said that they "continue indefinitely to contact lapsed members," and by 2018, this has increased to 33% of associations.
- Finally, although we do not have longitudinal data in this area, it appears that the ways that members engage with an association are shifting. When asked the engagement opportunities that associations report as increasing over the past year, over half of individual membership associations report **increases in participation** in the following areas: in their public social media (73%), in a private social network (59%), in their young professional program (54%), and in attendance of their webinars (52%).
- On the other hand, the **engagement activities that have shown the least increase** over the past year for individual membership associations include volunteering with the association (36%), the use of career services (32%), the purchase or maintaining of insurance through the organization (27%), and book or directory purchases (27%).



There are some membership practices that have NOT SEEN SUBSTANTIAL CHANGE over the last number of years.

I Even with increased computing power over the years, one area that has shown remarkably little improvement is the types of analysis done by associations to measure the effectiveness of membership marketing campaigns. When comparing data from 2012 to 2018, **the level of data analysis reported shows very little improvement.** Conducting membership marketing response rate analysis has only increased slightly from 49% to 51%. Lifetime value analysis of a member's economic contribution to the association has declined from 16% to 10%. And computer matchback analysis to evaluate responses by comparing new members to the prospect database has declined from 15% to only 10%.

I Associations also continue to report the desire to reach out to acquire younger members.

However, in 2011, 18% of associations offered a young professional new to the industry membership category. The same percentage of associations (18%) report offering this category in 2018.

The *Membership Marketing Benchmarking Report* is made possible by the faithful contributions of hundreds of associations that provide their data, comments, and guidance each year. We want to warmly thank each association that has participated this year and over the ten year life of this research.

As you review this year's report, please feel free to contact the authors with your questions and feedback. Additionally, if your organization is facing challenges with your membership marketing efforts and needs assistance, Marketing General Incorporated has a staff of experts that can provide you with guidance. Our contact information appears on the back cover of this report.

INTRODUCTION

SURVEY OBJECTIVE

For the tenth consecutive year, MGI has conducted its annual Membership Marketing Benchmarking Survey. As in past years, the report highlights the strategies and tactics that membership organizations find most useful in recruitment, engagement, renewal, and reinstatement of members.

Each year, we review the questions from the previous survey to ensure that the content we provide is relevant and on trend. We evaluate the usefulness and success of questions and determine which will be removed, what questions will be added, and which will be retained for further analysis. Additionally, we always include some suggested questions offered by previous survey participants.

METHODOLOGY

The 2018 Membership Marketing Benchmarking Survey was conducted online. It was launched on January 8, 2018, and remained open until February 19, 2018. Email invitations were sent to association executives who subscribe to MGI's monthly newsletter, the *Tipster*; had downloaded the 2017 Membership Marketing Benchmarking Report; MGI webinar registrants from 2015 to 2017; or had completed any survey from 2015 to 2017. A link to the survey was also available on the MGI social media sites. Finally, those who requested to participate but had not been included on any of the lists were sent a link to the survey.

RESPONSE RATE

Email invitations were sent to 18,577 individuals. Of those, 1,703 emails bounced, bringing the total to 16,874. A total of 689 executives completed the survey and 254 partially completed the survey, totaling 943 participants. The response rate is approximately 6%.

ANALYSES

Our practice is to include only one response per association, so as to not duplicate data. If more than one person from an association completes the survey, we use the data that was most complete, and/or the data from the individuals whose responsibilities most closely relate to membership marketing. We require that each association or company name be provided for this reason. If no association name or company is included, the data is not used. Net duplicate association submissions, a total of 821 unique associations participated in the current research.

REPORT LAYOUT

The data in this report will be segmented by type of association: Individual Membership Organization (IMO), Trade Association (Trade), or association with a combination of both individual and organizational types of membership (Combination). A total segment will be included in all charts and tables to show data relevant to all associations.

We are continuing our inclusion of the Participant Comment Highlights, which provide verbatim 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: Challenges and Goals



SECTION 6: Dues and Membership Structure



SECTION 7: Marketing Tools



SECTION 8: The Demographics of Your Association



SECTION 9: Words of Wisdom



ASSOCIATION STATISTICS

How has your membership changed in the past one year period?

MEMBERSHIP CHANGE IN PAST YEAR				
	Total (n = 819)	Individual (n = 379)	Trade (n = 241)	Combination (n = 199)
Increased	48%	47%	52%	44%
Decreased	25%	29%	19%	24%
Remained the same	26%	23%	28%	30%
Not sure	2%	1%	2%	3%

- Results show an uptick in the percentage of associations reporting increases in membership over the past year (48% vs. 46% in 2017). Similar to 2017 findings, 25% of associations report declines in membership in the past year, and about one-quarter report no change (26%).
- More than half of trade associations report increases in membership over the past year (52%), compared to 47% of IMOs and 44% of combination associations. Combination associations are the most likely to report no change in membership (30%), while IMOs are the most likely to indicate a loss of membership over the past year (29%).
- Associations showing increases in membership over the past five years, as well as increases in new members and increases in renewals are significantly more likely to also report increases in overall membership in the past year. Conversely, those associations reporting declines in membership over the past year are significantly more likely to also report declines in new members over the past year, declines in overall membership over the past five years, and declines in member renewals.
- New member renewal rates are also correlated with membership over the past year. Associations reporting new member renewal rates of 80% or higher are significantly more likely to report increases in overall membership numbers in the past year, while those with renewal rates less than 80% are significantly more apt to report declines in membership over the past year.
- Additionally, the larger IMOs (over 5,000 individual members) are significantly more likely to report declines in membership numbers over the past year while smaller IMOs (fewer than 5,000 individual members) are more apt to report no change in overall membership.

QUICK STAT

For associations reporting **INCREASES IN MEMBERSHIP** over the past year, the median increase is 5%.



PERCENTAGE INCREASE IN MEMBERSHIP OVER PAST YEAR				
	Total (n = 379)	Individual (n = 174)	Trade (n = 122)	Combination (n = 83)
Mean % Increased*	8%	8%	6%	9%
Median % Increased	5%	5%	5%	5%
Increased 1% to 5%	59%	57%	62%	57%
Increased 6% to 10%	21%	19%	23%	24%
Increased 11% to 50%	20%	24%	15%	18%
Increased more than 50%	1%	1%	-	1%

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

For associations reporting increases in membership over the past year, the median increase is 5%, mirroring findings from 2017. More than half of all associations report increases of 1% to 5% (59%).

Trade associations are more likely than IMOs or combination associations to report increases in this percentage range (62%). About one-quarter of trade and combination associations report increases of 6% to 10% (23% and 24%, respectively), and one-quarter of IMOs report increases of more than 10% (25%).

PERCENTAGE DECREASE IN MEMBERSHIP OVER PAST YEAR				
	Total (n = 192)	Individual (n = 101)	Trade (n = 45)	Combination (n = 46)
Mean % Decreased*	6%	5%	5%	7%
Median % Decreased	4%	4%	3%	4%
Decreased 1% to 5%	68%	68%	73%	63%
Decreased 6% to 10%	20%	22%	18%	17%
Decreased 11% to 50%	12%	10%	9%	20%
Decreased more than 50%	-	-	-	-

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

Of the associations reporting declines in membership over the past year, the median loss is 4%, a slight decrease from 2017 (5%). More than two-thirds of these associations indicate losses in membership over the past year of 1% to 5% (68%).

About three-quarters of trade associations describe declines of 1% to 5% (73%), a higher percentage than both IMOs and combination associations. IMOs are more likely than other types of associations to report declines of 6% to 10% (22%), while 20% of combination associations have declines of more than 10%, an increase from the previous year's findings (15% in 2017).



Over the past five years, how has the total percentage of your membership changed?

CHANGE IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 809)	Individual (n = 373)	Trade (n = 239)	Combination (n = 197)
Increased	53%	52%	56%	51%
Decreased	29%	31%	23%	31%
Remained the same	14%	13%	18%	12%
Not sure	4%	4%	3%	7%

- More than half of all associations report increases in membership totals over the past five years (53%). Trade associations are most likely to report increases (56%), compared to IMOs (52%) and combination associations (51%). These percentages, however, represent increases across the board compared to 2017.
- Almost three in ten associations report declines in their five-year membership numbers (29%). IMOs and combination associations are more likely to report declines (31% each) compared to trade associations (23%).
- Associations reporting increases in their membership over the past five years are significantly more likely to report increases in their one-year membership numbers, new members over the past year, and overall renewals over the past year. Similarly, those associations reporting declines in their five-year membership are significantly more likely to show reductions in their overall membership, their new members, and their overall renewals over the past year.
- Furthermore, associations reporting increases in their membership over the past five years are also significantly more likely have increases in new member renewal rates at or above 80%, while conversely, those associations reporting declines in their five-year membership are more likely to report new member renewal rates under 80%.
- Operating budgets also correlate with membership. Associations reporting increases in their membership over the past five years are significantly more likely to have the largest operating budgets (\$20 million or more), while those reporting declines in membership over the past five years tend to have budgets under \$20 million.

QUICK STAT

ASSOCIATIONS REPORTING INCREASES in their membership over the past 5 years are significantly more likely to have the largest operating budgets (\$20 million or more).



PERCENTAGE INCREASE IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 408)	Individual (n = 186)	Trade (n = 127)	Combination (n = 95)
Mean % Increased*	24%	25%	20%	27%
Median % Increased	12%	12%	10%	14%
Increased 1% to 5%	25%	26%	24%	22%
Increased 6% to 10%	22%	19%	28%	20%
Increased 11% to 50%	44%	44%	39%	48%
Increased more than 50%	10%	10%	10%	10%

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

- Over the past five years, associations report a median membership growth of 12%, down from 13% in 2017. One-quarter of associations report increases of up to 5% (25%), while 22% report growth of 6% to 10% over the past five years. The largest proportion of associations, however, report growth of 11% to 50% over the past five years (44%).
- Combination associations have the highest median growth over the past five years (14%), compared to 12% for IMOs and 10% for trade organizations. Combination associations are also the most likely to report increases of over 10% (58%). Trade organizations are the most likely to report increases of 6% to 10% (28%).

PARTICIPANT COMMENTS ASSOCIATION STATISTICS

Why do you believe your membership has INCREASED in the past five years?

- Due to expanding membership in other markets. (IMO)
- Dues rate reduction, aggressive membership marketing (direct mail, email & online). (IMO)
- I think we have done a great job of reaching out to new, younger people in the profession including offering a new Young Professionals discount. (IMO)
- Industry growth/recovery. Active promotion of membership from association and membership. (Trade)
- More money spent on acquisition. (IMO)
- New membership model, healthy industry. (Trade)
- New membership structure and way of counting members. (Combination)
- Stronger digital presence and online offerings. Growth in certification customers (offering more certifications and word-of-mouth) which leads to a growth in membership. (IMO)
- Targeted marketing, enhanced value proposition based on quantitative survey feedback. (IMO)
- Targeted membership campaigns. More aggressive marketing and enhanced member benefits. (Trade)
- The economy has improved for our industry. (Trade)
- The overall size of the market has increased. While we are not keeping pace with the size of market, it still naturally translates into more members. (IMO)
- We have increased our marketing efforts to better explain the value of membership. (Trade)
- We moved from a one-year calendar-based membership to anniversary date and offering either one or two year membership options. (IMO)



ASSOCIATION STATISTICS

PERCENTAGE DECREASE IN MEMBERSHIP OVER PAST FIVE YEARS				
	Total (n = 215)	Individual (n = 106)	Trade (n = 51)	Combination (n = 58)
Mean % Decreased*	12%	12%	13%	12%
Median % Decreased	9%	9%	10%	9%
Decreased 1% to 5%	33%	36%	24%	34%
Decreased 6% to 10%	29%	25%	33%	33%
Decreased 11% to 50%	39%	40%	43%	33%
Decreased more than 50%	-	-	-	-

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

- For associations reporting declines in membership over the past five years, the median decrease is 9%, down from 10% in 2017. One-third of associations reporting losses indicate their membership over the past five years has dropped by up to 5% (33%), while 29% report declines of 6% to 10%. However, the largest proportion of associations reporting declines in membership report losses in membership of over 10% (39%). This represents an increase from the 2017 results (37%).
- Compared to 2017, a higher percentage of all types of associations report losses of more than 10%. Trade associations are most likely to report the highest level of declines (43% reporting losses over 10% vs. 36% in 2017), while combination associations are least likely to report declines at that level (33% vs. 37% in 2017). 40% of IMOs report losses of more than 10% compared to 38% in 2017. IMOs are more likely than other types of associations to indicate losses over the past five years of up to 5% (36%).

PARTICIPANT COMMENTS ASSOCIATION STATISTICS

Why do you believe your membership has DECREASED in the past five years?

- Corporate consolidations, people leaving the industry or retiring, lack of interest in membership due to financial/economic constraints, our relevancy needing to be improved, which we have been doing over the last 5 years. (Combination)
- Fewer young people joining societies. A trend in universities to stop paying for professional memberships. Also, we have switched database CRM/AMS systems for the second time since 2010. (IMO)
- Increased availability of information and resources online (no longer needing to belong to an association to access education and support for our industry) and perhaps a changing view of the need for a professional membership affiliation. (IMO)
- Industry consolidation; free-rider problems; lack of perceived value; increase in dues during a downward economic cycle in agriculture. (Trade)
- Lack of awareness of the association. Too many other associations competing for the same members. Lack of understanding of the value of membership (which is incumbent upon us to convey). (Combination)
- Members are retiring in droves, and new students are not entering the field at rates to keep pace with retirements. (IMO)
- Merger and acquisition activity/business closures would account for most of it. (Trade)
- More competition from social networking and free professional development and niche organizations. (IMO)



- | Poor data management. Poor engagement with members. (Combination)
- | Poor IT infrastructure. (IMO)
- | The Leadership was infighting, and members were not being engaged, no events/no benefits to joining. (Combination)
- | There was nobody dedicated to recruitment consistently. Aging demographic with not enough members brought in to replace deceased members. (IMO)
- | Until last year there was no one in membership

only - several people had parts of membership but it wasn't being given enough attention. Renewal notices were not consistently sent, no recruitment, etc. (Combination)

- | We're experiencing decline as a result of communication and campaign fatigue. I also believe a lot of the resources we charge for are available elsewhere for free. (Combination)
- | Wish we knew. Doing more than ever to renew and reinstate members, but numbers continue to decline. (IMO)

What tools are you using to reverse the decline in membership?

- | 6 acquisition mailings annually. Online lead generation to drastically increase prospect pool. Beefing up tangible benefits that are attractive to current and recently retired federal employees. Email and online advertising to promote webinars (register ad join). (IMO)
- | Developed a new onboarding and first-year membership plan, ramping up engagement strategies, evaluating current benefits and introducing new benefits, reviewing sales strategies, reaching out to members more frequently to ensure we have the proper contact engaged, and developing strategies to work with younger demographics. (Trade)
- | Direct mail; email marketing; partnerships. (IMO)
- | Expanding into new markets. (Trade)
- | Focus on member onboarding. Trying to create better incentives for members to maintain continuous memberships rather than only paying dues when they are attending a meeting and utilize the member discount. (Combination)
- | Focusing on younger newer members and students. Rewarding the long term members. Offering monthly payment of membership fees. (Combination)
- | Lapsed member outreach, early renewal programs. (IMO)
- | Marketing Automation, New CRM and website, inside sales. (IMO)
- | Marketing, Marketing, Marketing. (IMO)
- | More aggressive new membership recruitment. (Trade)

- | More digital marketing to coincide with Direct Mail, revamping renewal emails, restructuring benefits. (Combination)
- | Redefining value. More emphasis on younger generations. (IMO)
- | Reorganized the department and hired the correct people. (Trade)
- | Researching allied health professionals who could also be interested in membership. Expanding internationally. Expanding our base. (IMO)
- | Strategic planning with Association expert. Adding relevant members-only benefits. Investing in Marketing Professional. Invested in survey. (Trade)
- | Telemarketing, email, direct mail, welcome calls, surveying, value added benefits, community platform. (IMO)
- | We are looking at new membership category to add new prospects to our membership recruitment pool. (IMO)
- | We are, for the first time, deep-diving into the data on our members that we have in our CRM database and online -- what events they come to, how many years they are a patron before they join, how many years a member before they lapse, how they engage with us on Facebook, what emails they respond best to...everything. We hope that by looking more at how our members behave, we'll be able to better tailor our join and renew messages to stop the (very) leaky bucket and attract new members. (IMO)



In the past one year, how has your new member acquisition changed?

CHANGE IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 785)	Individual (n = 367)	Trade (n = 228)	Combination (n = 190)
Increased	47%	45%	50%	45%
Decreased	12%	13%	12%	10%
Remained the same	35%	34%	34%	37%
Not sure	7%	8%	4%	8%

- Almost half of associations report increases in new members over the past year, an increase from 2017 (47% vs. 45% in 2017). Only 12% of associations indicate their new member acquisitions have declined in the past year, and 35% indicate there is no change in their new member acquisition numbers.
- Trade associations are most likely to report increases in new members (50%), compared to 45% of both IMOs and combination associations. While these results represent increases for both trade and combination associations since 2017, the findings indicate a decline in new members for IMOs since 2017 (45% vs. 47% in 2017). IMOs are the most likely to report declines in new members (13%), with combination associations the least likely (10%).
- Associations reporting increases in new member acquisitions over the past year are significantly more likely to also report increases in the overall membership over the past year and the past five years. They are also significantly more likely to report increases in the overall renewal rates. Conversely, those associations reporting decreases in new members are significantly more apt to report declines in their one-year and five-year membership numbers, as well as their overall renewal rates.

QUICK STAT

Those associations reporting **DECREASES IN NEW MEMBERS** are significantly more apt to report declines in their one-year and five-year membership numbers, as well as their overall renewal rates.



PERCENTAGE INCREASE IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 331)	Individual (n = 153)	Trade (n = 101)	Combination (n = 77)
Mean % Increased*	13%	14%	12%	12%
Median % Increased	6%	5%	6%	6%
Increased 1% to 5%	48%	49%	47%	47%
Increased 6% to 10%	23%	19%	24%	30%
Increased 11% to 50%	25%	28%	26%	20%
Increased more than 50%	4%	4%	4%	4%

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

Overall, the percentage of increases in new members has declined since 2017, with a median percentage increase of 6%, down from 8% in 2017. Associations reporting increases are most likely to report increases of up to 5% (48%), up from 44% in 2017. IMOs are more likely to report increases of only 1% to 5% (49%) compared to trade and combination associations (47% each). The percentage of trade and combination associations reporting increases at this low level, however, has increased since 2017 (47% vs. 44% in 2017 for trade associations and 47% vs. 35% in 2017 for combination associations).

Close to three in ten associations report increases of more than 10% in new members over the past year (29%), a decline from 2017 (38%). Fewer associations of all types report increases in new members at the highest levels: 32% of IMOs report increases over 10% compared to 38% in 2017; 30% of trade associations report increases of new members over 10% compared to 35% in 2017; 24% of combination associations report increases of new members over 10% compared to 43% in 2017.

PERCENTAGE DECREASE IN NEW MEMBER ACQUISITION OVER PAST YEAR				
	Total (n = 89)	Individual (n = 43)	Trade (n = 27)	Combination (n = 19)
Mean % Decreased*	13%	12%	14%	15%
Median % Decreased	8%	8%	7%	11%
Decreased 1% to 5%	38%	40%	37%	37%
Decreased 6% to 10%	21%	28%	19%	11%
Decreased 11% to 50%	39%	33%	41%	53%
Decreased more than 50%	1%	-	4%	-

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

The median decline in new members over the past year is 8%, mirroring findings from 2017. Overall, 40% of associations report declines in new members of more than 10%. Unlike 2017, IMOs are more likely to report declines of only 1% to 5% (40% vs. 32% in 2017), while combination associations are less likely to have kept declines at this lower level (37% vs. 46% in 2017).

Trade and combination associations are significantly more likely than IMOs to have declines in new members over 10% (45% and 53%, respectively vs. 33% for IMOs). Additionally, a higher percentage of trade and combination associations show declines at this level compared to 2017 (45% of trade associations vs. 40% in 2017; 53% of combination associations vs. 39% in 2017).



QUICK STAT

ACROSS ALL ASSOCIATIONS, more than one-quarter of associations report that their member renewal rate has increased over the past year (27%).

In the past one year, how has your member renewal rate changed?

CHANGE IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 774)	Individual (n = 361)	Trade (n = 224)	Combination (n = 189)
Increased	27%	28%	26%	28%
Decreased	24%	26%	21%	22%
Remained the same	42%	38%	48%	43%
Not sure	7%	8%	5%	7%

- Across all associations, more than one-quarter of associations report that their member renewal rate has increased over the past year (27%), while slightly fewer associations report a depressed renewal rate (24%). Compared to 2017, a higher percentage of associations are reporting increases in renewal rates (27% vs. 25% in 2017). IMO's and combination associations are most likely to report increases in renewal rates (28% each, vs. 26% for trade associations).
- Most associations, however, indicate no change in their overall renewal rate (42%). Trade associations are most likely to report no change

in renewals (48%), compared to combination associations (43%) and IMO's (38%). About two in ten trade and combination associations report drops in renewal rates (21% and 22%, respectively), while 26% of IMO's report declines.

- Associations reporting increases in their membership over the past year, and the past five years, are significantly more likely to report increases in their renewal rates, while those reporting declines in their one-year and five-year membership numbers, as well as their new member acquisitions are significantly more likely to report drops in their renewal rates.



PERCENTAGE INCREASE IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 199)	Individual (n = 96)	Trade (n = 55)	Combination (n = 48)
Mean % Increased*	8%	10%	5%	8%
Median % Increased	4%	3%	3%	4%
Increased 1% to 5%	67%	66%	71%	65%
Increased 6% to 10%	19%	16%	20%	23%
Increased 11% to 50%	12%	14%	9%	10%
Increased more than 50%	3%	5%	-	2%

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

- For associations reporting increases in member renewal rates, the median increase is 4%. Two-thirds of associations report increases in their renewals of up to 5%, (67%), with trade associations most likely to report increases in this percentage range (71%). Approximately 19% of associations reporting increases in renewals indicate an increase of 6% to 10%, and 15% report increases of over 10%. This represents an

increase in the highest levels compared to the previous research (15% vs. 13% in 2017).

- IMOs are most likely to report increases of more than 10% (19%) compared to trade and combination associations (9% and 12%, respectively). The percentage of IMOs reporting increases over 10% has shown an impressive uptick since 2017 (19% vs. 12% in 2017).

PERCENTAGE DECREASE IN MEMBER RENEWAL RATE OVER PAST YEAR				
	Total (n = 170)	Individual (n = 87)	Trade (n = 45)	Combination (n = 38)
Mean % Decreased*	6%	6%	6%	6%
Median % Decreased	4%	3%	4%	4%
Decreased 1% to 5%	70%	69%	73%	69%
Decreased 6% to 10%	19%	19%	20%	18%
Decreased 11% to 50%	10%	10%	7%	13%
Decreased more than 50%	1%	1%	-	-

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

- Of the associations reporting decreases in their overall renewal rates, 70% indicate drops of up to 5%, and 19% report declines of 6% to 10%. Only 11% of associations report declines in their overall renewal rates of more than 10%. Compared to findings from 2017, fewer associations across the board report declines of up to 5%.
- Trade associations are most likely to report renewal rate declines of up to 5% (73%), compared to IMOs and combination

associations (69% each). But trade associations are also least likely to report declines of more than 10% (7%) compared to IMOs (11%) and combination associations (13%). Compared to results from 2017, trade associations are less likely to report drops in renewal rates over 10% (7% vs. 14% in 2017) and combination associations are more likely to report drops over 10% (13% vs. 9% in 2017).



What is your overall membership renewal rate?

OVERALL MEMBERSHIP RENEWAL RATE				
	Total (n = 649)	Individual (n = 283)	Trade (n = 202)	Combination (n = 164)
Mean	81%	78%	88%	78%
Median	84%	80%	89%	81%

- Echoing findings from 2017, the median renewal rate is 84%, and 68% of associations report renewal rates of 80% or higher. At 89%, trade associations have the highest median renewal rate. IMOs and combination associations have similar renewal rates; both show renewal rates around 80%.
- Trade associations are most likely to report renewals of 80% or more compared to IMOs and combination associations (91% vs. 57% for IMOs and 59% for combination associations).
- Associations with increases or no change in membership over the past year are significantly more likely to report renewal rates of 80% or higher. Similarly, associations with new member renewals at or above 60% are significantly more likely to report overall renewal at 80% or higher.
- Trade and combination associations with at least 100 company/group members are significantly more likely to have renewal rates of 80% or more. Small IMOs or combination associations (up to 1,000 individual members) are most likely to have overall renewal rates at or above 80%.

What is your renewal rate for first year members?

RENEWAL RATE FOR FIRST-YEAR MEMBERS				
	Total (n = 466)	Individual (n = 197)	Trade (n = 156)	Combination (n = 113)
Mean	70%	63%	81%	67%
Median	70%	62%	85%	66%

- The median renewal rate for new members is 70%, down from 74% in 2017. Trade associations have the highest new member renewal rates (85%), compared to combination associations (66%) and IMOs (62%).
- Associations with overall renewal rates at or above 80% are significantly more likely to have new member renewals over 80% as well. Similarly, associations with increases in membership over the past year, increases in membership over the past five years, and increases in new members are significantly more likely to report new member renewals at 80% or higher.
- Large IMOs and combination associations (over 5,000 individual members) are significantly more likely to report new member renewals of less than 60%, while the smallest associations (up to 1,000 individual members) are significantly more likely to report new member renewals of 80% or more.



Please indicate what percentage of your membership belongs to each of following generation groups.

GENERATION GROUPS	
	Individual (n =222)
Generation Z (born 1996 or later)	6%
Millennial (born 1980 to 1995)	19%
Generation X (born 1965 to 1979)	29%
Baby Boomers (born 1946 to 1964)	36%
Born 1945 or earlier	11%

- Similar to findings from 2017, Baby Boomers make up the largest percentage of membership in IMOs (36% vs. 39% in 2017). Findings show a slight increase in Millennial members (19% vs. 17% in 2017) and in Generation Z members (6% vs. 4% in 2017).
- Associations with increases in their one-year membership and five-year membership numbers are significantly more likely to have a higher

percentage of millennial members. IMOs reporting declines in their membership over the past five years are significantly more apt to report a higher percentage of Baby Boomer members.

- IMOs with operating budgets less than \$20 million are significantly more likely to have a higher percentage of Baby Boomers compared to associations with more than \$20 million in their operating budget.

QUICK STAT

ASSOCIATIONS WITH INCREASES in their one-year membership and five-year membership numbers are significantly more likely to have a higher percentage of millennial members.



MEMBER RECRUITMENT

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

CHANNELS THAT GET MOST NEW MEMBERS				
	Total (n = 708)	Individual (n = 318)	Trade (n = 215)	Combination (n = 175)
Word-of-mouth recommendations	67%	66%	63%	74%
Email	61%	65%	56%	63%
Promotion to/at your own conferences/trade shows	34%	30%	41%	33%
Cross-sell to non-members who buy your products or attend your conferences	29%	23%	37%	30%
Direct mail	26%	31%	20%	23%
Local events/meetings	26%	25%	27%	26%
Association-sponsored events	25%	25%	25%	24%
Personal sales calls	20%	8%	39%	19%
Chapters	19%	26%	10%	17%
Exhibiting at other conferences	18%	16%	23%	17%
Advertising in your own publications	12%	12%	14%	10%
Free membership offered with a non-member meeting registration	12%	18%	3%	12%
Paid online digital marketing	12%	17%	4%	11%
Public relations	11%	8%	18%	10%
Accreditation promotion	9%	10%	7%	7%
Content marketing (white papers)	7%	6%	8%	9%
Telemarketing	5%	7%	3%	3%
Advertising in outside publications	4%	5%	3%	3%
Radio or TV	1%	2%	1%	1%
Other	13%	13%	11%	15%



QUICK STAT

12% of participants consider **DIGITAL MARKETING** to be one of the most effective channels for acquiring new members.

- Overall, word-of-mouth recommendations, email, and promotions to/at your association's conferences or trade shows garner the most new members.
- For trade and combination associations, the three most effective means for acquiring new members is the same. However, for IMOs, direct mail is a slightly more effective channel than promotion to/at conferences.
- For associations with renewal rates of 80% or higher, personal sales calls tend to be significantly more effective (26% vs. 10% of associations with renewal rates below 80%). Additionally, associations showing increases in their five-year change in membership indicate that promotion to/at conferences is significantly more effective in recruiting new members compared to those reporting declines (37% vs. 28%).
- Associations with increases in their renewal rates are significantly more likely to find email a highly effective recruitment tool compared to associations reporting declines in renewals (68% vs. 62%).
- Word-of-mouth recommendations become less effective as the number of individual members increases, or the operating budget decreases. Direct mail, however, becomes more effective as the number of individual members and group/company members increases. It is also positively correlated to operating budget, such that the effectiveness of direct mail increases as the operating budget increases.
- Email and promotions at conferences also improve in recruiting new members as the operating budget increases. Using chapters as a recruitment vehicle becomes more effective as the number of individual members increases as well.



Which of the following digital advertising channels provide the most new members? (Check all that apply.)

DIGITAL MARKETING TOOLS THAT GET MOST NEW MEMBERS				
	Total (n = 83)	Individual (n = 54)	Trade (n = 9)	Combination (n = 20)
Facebook Paid Advertising	68%	72%	56%	60%
Remarketing (Facebook, AdRoll, or Google)	49%	44%	56%	60%
Search engine optimization (SEO)	40%	41%	67%	25%
Search engine ads (pay-per-click)	40%	39%	44%	40%
Paid banners on other websites	24%	35%	-	5%
Lead generation content marketing (White Papers)	22%	22%	33%	15%
LinkedIn Paid Advertising	21%	15%	33%	30%

12% of participants consider digital marketing to be one of the most effective channels for acquiring new members. The associations that use digital marketing effectively indicate that paid Facebook advertising and remarketing (Facebook, AdRoll, Google) are the most effective methods (68% and 49%, respectively).

For 72% of IMO's using digital marketing, paid Facebook ads are the most effective. However, 67% of trade organizations using digital marketing consider search engine optimization (SEO) to be the most effective channel. An equal percentage of combination association executives rate paid Facebook ads and remarketing as highly effective (60% each).

How effective are the following offers for recruiting new members?

EFFECTIVENESS OF OFFERS FOR RECRUITING NEW MEMBERS (VERY EFFECTIVE/EFFECTIVE)				
	Total	Individual	Trade	Combination
Conference or convention discount	59%	61%	55%	59%
Dues discount for first year	56%	59%	54%	50%
Additional months free (e.g., 15 months for the price of 12)	44%	47%	41%	43%
Monthly or quarterly installment dues	41%	46%	37%	35%
Product discount, coupons, or voucher	39%	38%	36%	44%
Multiple-year dues discount	37%	40%	29%	35%
Free trial	30%	36%	20%	30%
Free gifts or premiums	28%	36%	18%	22%
Member-referral incentives (given to members)	28%	35%	24%	20%
No risk/dues back guarantee (refundable dues)	23%	20%	32%	15%
Drawing or contests	19%	25%	12%	9%

- The most effective recruitment offers (very effective + effective) include conference/convention discounts (59%), dues discount for the first year (56%), and additional months free—15 months for the cost of 12 (44%). For IMO and trade organizations, the top three remain the same, however, for combination associations, product discounts, coupons, or vouchers are slightly more effective than additional months (44% vs. 43%).
- Associations reporting increases in their five-year membership are significantly more likely to use conference/convention discounts, compared to those reporting declines (64% vs. 51%). Moreover,

associations reporting renewal rates of 80% or higher are more likely to indicate additional months as an effective recruitment tool (47% vs. 37%).

- Large IMOs (20,000 or more individual members) are significantly less inclined to consider conference or convention discounts an effective channel for member recruitment compared to smaller associations. Associations with the largest operating budgets (\$20 million or more) are significantly more inclined to choose free gifts or premiums as an effective means of recruitment (39%) compared to associations with smaller operating budgets.



What do you believe are the top three reasons members join your organization?

TOP REASONS MEMBERS JOIN ORGANIZATION				
	Total (n = 683)	Individual (n = 310)	Trade (n = 205)	Combination (n = 168)
Networking with others in the field	58%	48%	64%	67%
Learning best practices in their profession	26%	20%	29%	32%
Attending conferences/trade shows	25%	22%	30%	23%
Accessing specialized and/or current information	25%	21%	30%	24%
Supporting the mission of the association	23%	27%	19%	21%
Supporting advocacy	21%	16%	32%	16%
Obtaining discounts on product or meeting purchases	20%	22%	14%	25%
Advancing their career	17%	23%	5%	18%
Accessing association publications	15%	23%	6%	12%
Purchasing continuing education	14%	17%	10%	14%
Gaining or maintaining professional certification	12%	17%	7%	11%
Receiving recognition or prestige by belonging to the association	11%	13%	9%	10%
Accessing industry thought leaders	10%	6%	16%	11%
Accessing industry benchmark studies	5%	1%	11%	3%
Using affinity programs (insurance, rental cars, retail discounts, etc.)	4%	4%	7%	2%
Accessing the job board	1%	1%	-	2%
Other	8%	10%	8%	5%
Not sure	<1%	<1%	-	-



- Overall, association executives are most likely to say that members join to network with others in their field (58%), and learn best practices in their profession (26%). This is also true for combination associations. However, executives from IMOs feel that members are more likely to join to support the mission of the association (27%), and executives of trade organization indicate members join to support the advocacy efforts conducted on behalf of the profession represented (32%).
- The differences between IMOs, trade organizations, and combination associations continue. Almost one-quarter of executives from IMOs report that members join to advance their career and/or access the association publications

(23% each). One in three trade organization executives indicate that members are highly likely to join to attend conferences/trade shows and/or to access specialized and current information (30% each). One-quarter of executives from combination associations report that members join to obtain discounts on product or meeting purchases (25%).

- Associations with new member renewal rates below 80% are significantly more likely to indicate that members join to obtain discounts on product and meeting purchases, to access association publications, and to gain or maintain professional certification.

PARTICIPANT COMMENTS MEMBER 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.

- 15 months of membership for the first 12 months with the option to cancel after the first three months and owe nothing. (Trade)
- Abandoned online application follow up - we target cart abandoners with a series of three follow up e-mails, let rest for 6-9 months, and then roll into our direct outreach content series. (IMO)
- Annual conference discount includes 1 year of membership. (Combination)
- Increase student membership through graduate level schools and offering to waive application fee for their students. (IMO)
- Lead generation. A coordinated effort when procuring lists. (IMO)
- Member referral program: we asked members to refer other professionals who would benefit from the membership. The first year of the program we offered a \$50 discount on the renewal for

the member and a \$50 off membership to the new member. We also added a draw at the end of the year so all members who referred someone would get a chance to win prizes. The members referred others, but we noticed that they were not interested in the prizes at all and were moderately interested in the discount. We learned that our members might refer others simply because they get value from the membership and are more than happy to talk to others about it. We are now pushing to improve the value proposition and the communication of the membership benefits to members. (Combination)

- Multi-year discounts have been huge for us. It has to be a significant discount to generate significant interest, but when you consider the number of people you don't have to run through the renewal cycle over and over (while losing many of them), it's worth it. (IMO)

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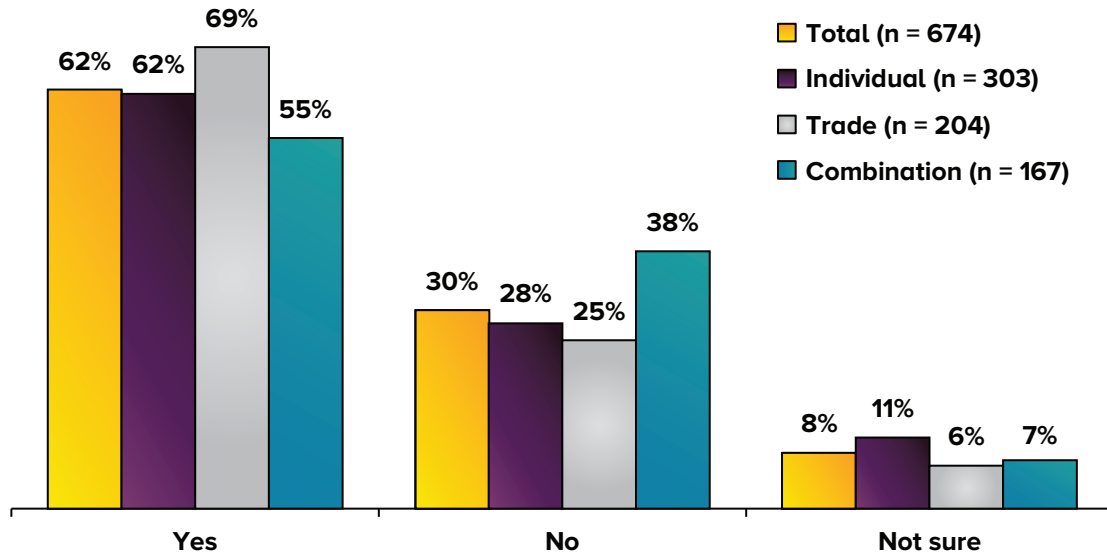
MEMBER RECRUITMENT

- One of most successful new-member acquisitions is waiving the \$65 initiation fee for the first year. That helps reduce some of the "sticker shock" when a new member joins online and sees what the final cost of membership will be. (IMO)
- Our Board came together to determine our new vision statement and tagline. Building their 'elevator speech' and knowing what's important to prospective members. Communicating "What's in it for them" through several promotional platforms including a new website, new association logo/brand, new membership information brochure, member-only benefits, social media, etc. (Combination)
- Personal calls are the best. For us, each institution has a different stakeholder so one-on-one communications makes the biggest difference. (Trade)
- Refer a friend with incentive to win Apple Smart Watch or Amazon Echo. (Combination)
- We are a part of a list exchange service with other similar organizations. We offer memberships to new members, at whatever cost they choose to pay. (IMO)
- We did a three-part campaign with informational videos on an upcoming tough subject. We released the videos on YouTube each week and sent an email to our non-member lead group with the chance to watch the video. Each video had between 3,000-8,000 views each. This was great exposure and information sharing for us. The content we sent was really of interest, and with a bit of time and effort, we provided a glimpse into the valuable resources we offer members. (Combination)
- We have been testing special offers of 1/2 off membership the first year. It doubles our return on mailings. Now we are watching how those folks renew. (IMO)
- We have found that re-targeting ads have been most successful for us from an ROI point of view. We re-target them to download a white paper. (IMO)
- We have tested a 15-months-for-the-price-of-12 against a straight \$15 discount. Even though the former promotion is worth more to the member, the \$15 dollars-off promo is much more successful. It appears to be the "immediacy" effect that makes this the offer to beat. (IMO)
- We highlight important, high-profile advocacy work and leverage it to demonstrate our powerful and unique role within the industry. Data points work well in these instances. For example, "8,000 members signed on to our community letter that was sent to Congress. Join us in the fight to protect the interests of..." (Trade)
- We offer a free 3-month membership (individual) to people attending our conferences for the first time. The conversion rate has been high. (Combination)
- We send 3 direct mail pieces a year and have started to pair each campaign with Facebook ads targeting our internal segments. This has helped expand the reach of each campaign. (Combination)
- We went back to some direct mail outreach. We found success in sending an application that was already filled out with the information we had on the prospective member. All they had to do was pay (update info). (Trade)
- We've created a new Institutional Membership option which replaces the previous per-member fee structure with a flat fee based on the size of the organization. This is driving increased revenues and engagement (i.e., more individual members per organization, while actually decreasing the per-member cost to the organization). (Combination)



MEMBER ENGAGEMENT

Do you have a tactical plan to increase engagement?



- The majority of associations have a strategic initiative to increase engagement (62%).
- Trade associations are significantly more likely to have a strategic initiative (69%).
- IMOs with more than 1,000 members are significantly more likely to have a strategic

initiative to increase engagement than smaller organizations (63% vs. 46%).

- Organizations with an operating budget of \$1 million or more are significantly more likely to have a tactical plan than those with a smaller budget (64% vs. 51%).

QUICK STAT

Only 44% of associations **SEND A MAILED WELCOME KIT**; down from 51% last year and 83% in 2009.

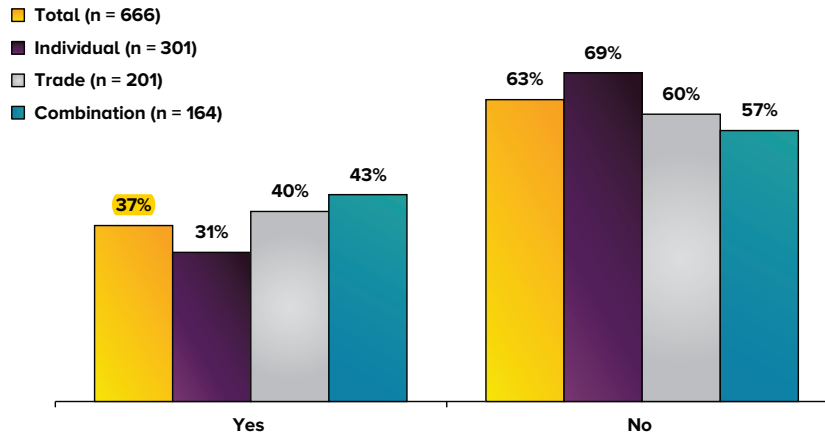


Which of the following communication methods do you use to help onboard or engage new members in the association? (Check all that apply.)

COMMUNICATION METHODS TO ONBOARD NEW MEMBERS				
	Total (n = 664)	Individual (n = 301)	Trade (n = 200)	Combination (n = 163)
Email welcome	79%	77%	82%	78%
Opportunity to create a membership profile	45%	42%	42%	53%
Mailed welcome kit	44%	43%	44%	45%
Membership card or certificate	43%	55%	25%	42%
Invite to use members-only website sections	41%	37%	50%	38%
Emailed welcome kit	34%	31%	40%	34%
New-member engagement email series	33%	38%	28%	31%
Invite to follow/like association's social media (public or private) page(s)	31%	32%	29%	31%
Invitation to join the online community	31%	31%	29%	33%
Volunteer or staff welcome phone call	27%	16%	45%	27%
In-person new-member reception or orientation	26%	21%	35%	23%
Invitation to volunteer	26%	26%	25%	26%
New-member survey	18%	20%	11%	24%
Invite to chapter meeting	16%	19%	14%	14%
New-member newsletter (mail or electronic)	13%	14%	11%	13%
New-member webinars	12%	8%	18%	14%
New-member gift (e.g., gift card, calendar, or notepad)	11%	11%	12%	10%
Special new-member discounts on purchases	10%	11%	14%	5%
Custom new-member renewal series	10%	11%	6%	12%
Telemarketing welcome phone call	9%	9%	12%	8%
Chapter welcome phone call	9%	9%	9%	9%
Invite to download mobile apps	6%	7%	4%	6%
Early or 'at-birth' renewal	3%	2%	4%	3%
Text messaging specific to new members	2%	2%	1%	1%
Other	5%	3%	8%	6%
No special communication	2%	3%	3%	-

- An email welcome is the most common method used to help onboard or engage new members.
- An opportunity to create a membership profile is a distant second choice method, while mailed welcome kits are the third most popular method.
- Only 44% of associations send a mailed welcome kit; down from 51% last year and 83% in 2009.
- Associations with renewal rates at or above 80% are significantly more likely to extend an invitation to use members-only website sections (45% vs. 33%).
- Associations with an operating budget of \$20 million or more are significantly more likely to mail out a welcome kit to new members compared to associations with operating budgets less than \$20 million.

Do you offer certification(s)?

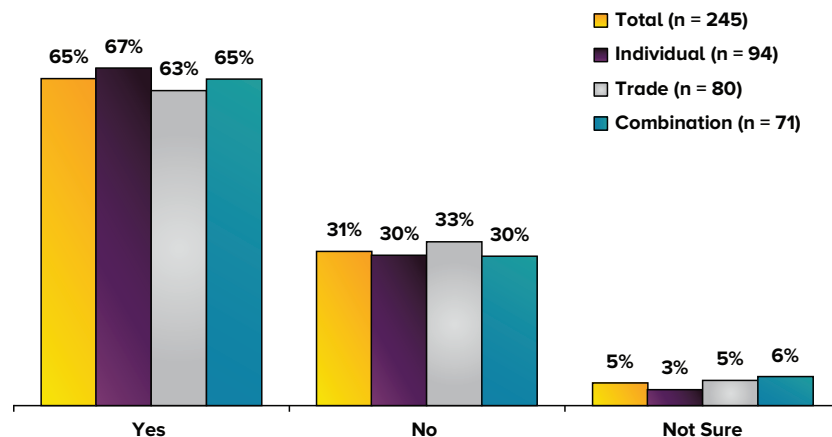


- 37% of associations offer certification, consistent with 2017 and up from 35% in 2016.
- 43% of combination associations offer certification, compared to 31% of IMOs and 40% of trade associations.
- Large trade associations are significantly more likely to offer certification. 48% of those with

500+ members offer certification, compared to 34% of all smaller trade associations.

- Offering certification has a positive effect on renewal rates. 43% of associations that saw a renewal increase also offer certification. Only 34% of those that saw a decrease in renewals offer certification.

Does your certification(s) require renewal?



- Nearly two-thirds of organizations offering certification require a renewal.
- Organizations seeing a one-year membership increase are significantly more likely to require

certification renewal than those that see no change (69% vs. 53%).

- IMOs – those with more than 1,000 members – are more likely than smaller IMOs to require certification renewal (69% vs. 53%).

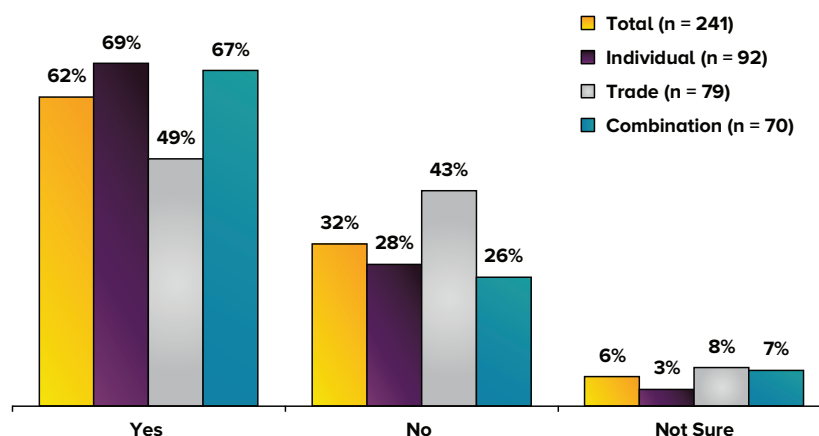


What is your overall renewal rate for certificants?

RENEWAL RATE FOR CERTIFICANTS				
	Total (n = 73)	Individual (n = 30)	Trade (n = 18)	Combination (n = 19)
Mean	77%	82%	81%	61%
Median	84%	88%	83%	59%

- The median renewal rate for certificants is 84%.
- Those associations seeing one-year and five-year increases in membership also see higher certificant renewal rates than those associations that experienced decreases.
 - Associations experiencing a one-year increase saw 84% of certificant renewals compared to 78% among those with a decreasing membership.
 - Associations with a five-year increase in membership had an 86% certificant renewal rate compared to 72% among associations with a five-year declining membership rate.

Is continuing education required to maintain certification?



- Significantly fewer trade organizations require continuing education to maintain certification (49% vs. 69% for IMOs and 67% for combination associations).
- Associations experiencing a renewal rate of less than 80% are significantly more likely than those with higher renewal rates to require continuing education for certification (71% vs. 56%).
- Organizations seeing declining membership rates are more likely to require continuing education to maintain certification.
 - Among organizations with a one-year decrease, 70% required continuing education compared to only 60% among those that saw an increase in membership and 59% of those whose membership remained steady.
 - Five-year membership rates also saw the same trends. Among those with a decrease, 70% required continuing education, while only 60% of those with increasing or steady rates required continuing education.



In the past fiscal year, how has 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.



70% of all associations saw an increase in participation in their public social network. The use of private social networks continues to decrease slightly. Only 57% of associations saw an increase, down from 60% in 2017 and 63% in 2016.

Fewer associations (53%) saw an increase in webinar attendance, down from 56% in 2017 and 60% in 2016.



Individual

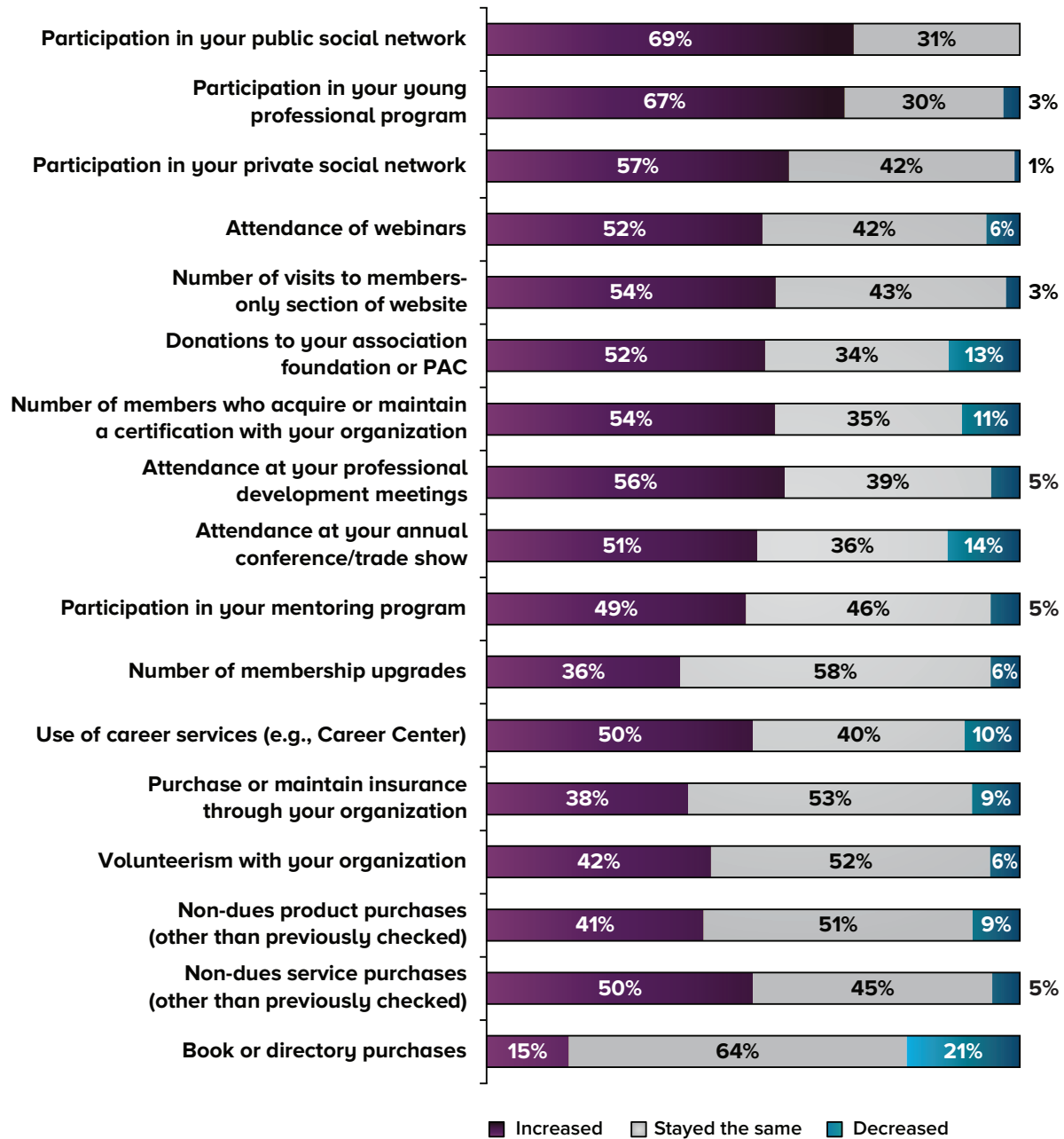


Only 14% of all associations saw a decrease in attendance at their annual conference/trade show. This is an improvement from 2017, when 15% of associations indicated a decrease.

61% of all associations with a five-year membership increase also saw growth in attendance at their annual conference/trade show last year. This compares to 33% among those who have a five-year decrease in membership.



Trade



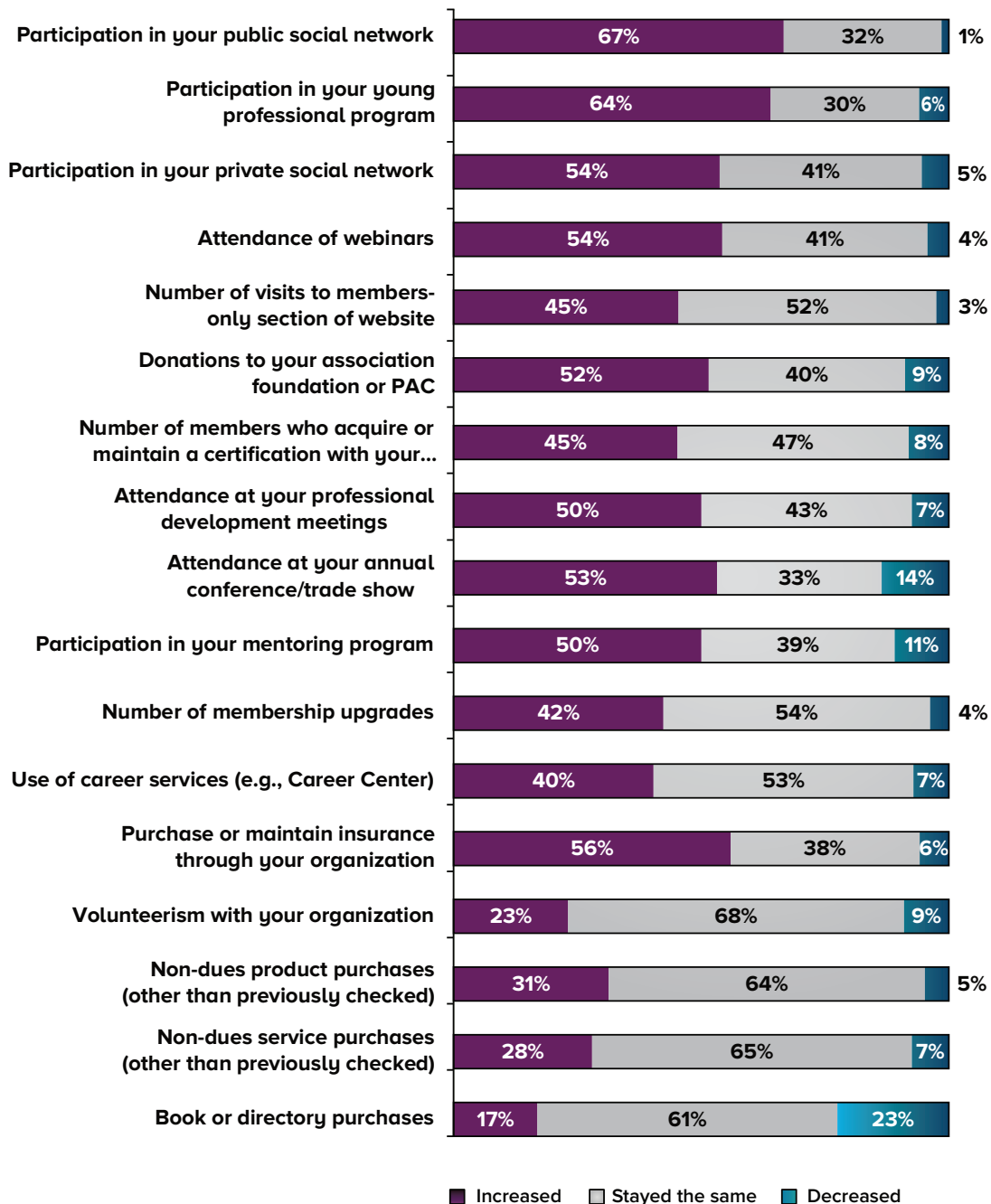
56% of trade associations and 50% of combination associations saw attendance growth in professional development meetings.

IMOs saw slower growth, with only 47% seeing an increase in attendance at professional development meetings in the past year; this was a marked improvement over 2017 (40%).



MEMBER ENGAGEMENT

Combination



58% of all associations that experienced increased new member growth in the past year also saw an increase in attendance at their

annual conference/trade show. Only 37% of those with negative growth and 44% with no new member growth saw increased attendance.

What service do you use for your online community?

ONLINE COMMUNITY SERVICE				
	Total (n = 627)	Individual (n = 279)	Trade (n = 191)	Combination (n = 157)
Higher Logic	25%	29%	19%	26%
YourMembership (YM)	6%	5%	6%	10%
Sociious	1%	1%	2%	1%
Small World Community	1%	1%	-	1%
Kavi Workspace	<1%	-	1%	-
Causeway	<1%	-	1%	-
MemberFuse	<1%	<1%	-	-
Pathable	<1%	<1%	-	-
Other	20%	22%	17%	21%
We don't offer an online community	46%	42%	55%	41%

- 46% of associations do not offer an online community.
- At 55%, trade associations are significantly more likely not to provide an online community. Only 42% of IMOs and 41% of combination associations forego an online community.

Which social media does your organization officially use? (Check all that apply.)

SOCIAL MEDIA USED BY ASSOCIATIONS				
	Total (n = 650)	Individual (n = 293)	Trade (n = 195)	Combination (n = 162)
Facebook	93%	95%	88%	95%
Twitter	89%	89%	88%	90%
LinkedIn (Public)	69%	63%	74%	74%
YouTube	60%	60%	61%	60%
Instagram	40%	49%	28%	38%
LinkedIn (Association Members Only)	34%	33%	32%	38%
Association Blog	21%	18%	19%	30%
Pinterest	13%	15%	8%	15%
Association Listserv	9%	10%	5%	13%
Flickr	9%	9%	9%	7%
Google +	9%	9%	5%	12%
Private Association Social Network	7%	8%	5%	8%
Other (please specify)	4%	4%	5%	4%
None-we don't use social media	1%	1%	1%	-

- Facebook and Twitter are the most popular social media platforms across each type of association.
- Facebook has rebounded to 93% overall, after having dropped from 91% to 89% in 2016.
- LinkedIn (public) has increased two points to 69%, and Instagram has continued to climb steadily, increasing eight points to 40%.
- Facebook is significantly more popular among IMOs and combination associations (95%) than among trade associations (88%).



PARTICIPANT COMMENTS MEMBER ENGAGEMENT

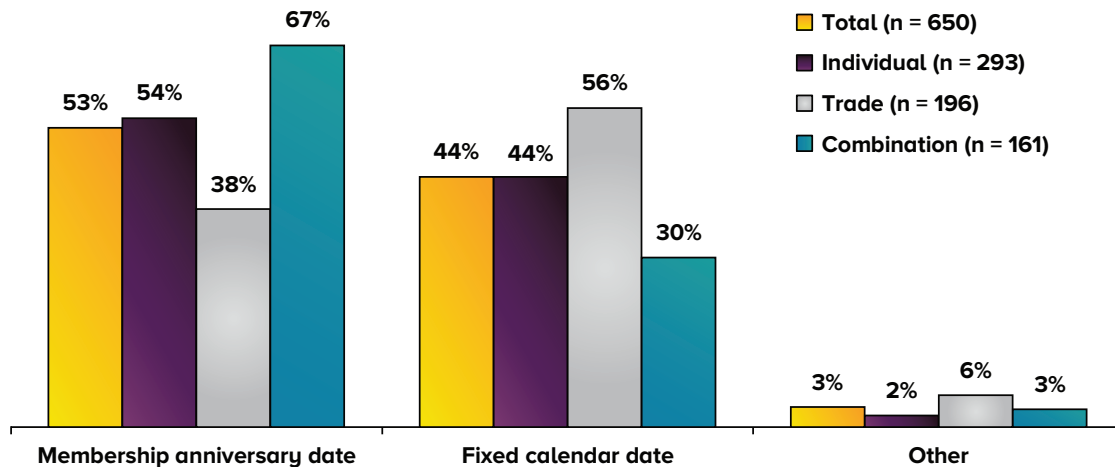
How do you measure the effectiveness of your engagement strategy?

- A/B testing. Activity scoring. Relevance rating. Response rates. Click throughs. (Combination)
- By how many members participate in our members-only online community, join committees, and step up into chapter leadership roles. (IMO)
- By the number of memberships retained at the end of the billing cycle. (Combination)
- Comparing churn and total membership numbers with previous years. (IMO)
- First year retention, online community involvement, first year member satisfaction survey. (IMO)
- Google analytics. (Combination)
- KPIs include downloads of content, webinar registrations, website interactions, email interactions, and social media interactions. (IMO)
- Member login, content usage. (IMO)
- Not very well. We try to plot responses from each engagement effort. (Trade)
- Open rates and click through rates. (Combination)
- Participation rates in our services and offerings, as well as revenue in those areas. (Combination)
- Retention rate. (Combination)
- Track engagement using a membership dashboard, then surfacing each company's involvement over the past three years in key categories, providing an average of their industry peers in that category. They can then see, at a glance, whether they are above or below average. (Trade)
- Ultimately based on retention rate. We use open and click rates to measure effectiveness of individual engagement tactics. (IMO)
- We are just beginning to undertake this and have no results as of yet. (Combination)
- We assign an engagement score and also review email open rates, downloads of resources made available, etc. We routinely conduct surveys to measure member satisfaction and use of benefits. (IMO)
- We have a series of "early engagement" automated messages, for which we track open rates, click rates, and conversion rates. We are also tracking the following standard metrics (overall and by segment):
 - Donation rate (% of members who make donations)
 - Volunteer rate (% of members who volunteer)
 - Registration rate (% of members who register for our events and webinars)
 - Conversion rate for 1st-year free members
 - Renewal rate (Combination)
- We measure engagement in a few ways - website traffic, community participation, webinar registrations, volunteer signups, and event participation. (Combination)



MEMBER RENEWAL AND REINSTATEMENT

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



- 53% of associations base the membership renewal on the anniversary date, while 44% choose a fixed calendar date. This represents a one-point increase in using the anniversary date, while the fixed calendar date remains constant.
- Trade associations are significantly more likely to use a fixed calendar date (56% vs. 44% for IMOs and 30% for combination associations).

- IMOs and combination associations are significantly more likely to use a membership anniversary date (54% and 67%, respectively, vs. 38% for trade associations).
- 48% of associations with a new member renewal rate of 60% or higher renew members on a fixed calendar date. Associations with a new member renewal rate of less than 60% overwhelmingly use the member anniversary date (76%).

QUICK STAT

Associations with an 80% or **HIGHER RENEWAL RATE** are significantly more likely to offer a grace period (88% vs. 79%).



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

LENGTH OF GRACE PERIOD				
	Total (n = 417)	Individual (n = 191)	Trade (n = 129)	Combination (n = 97)
One month	21%	26%	9%	26%
2 to 3 months	48%	44%	54%	49%
6 months	12%	9%	19%	6%
One year	2%	2%	5%	1%
More than a year	1%	1%	-	1%
We don't offer a grace period	17%	18%	13%	18%

- Most associations offer a grace period; only 17% do not (down from 20% in 2017).
- 69% of associations offer a grace period of up to three months; 48% offer a grace period of 2 to 3 months.
- Trade associations are significantly more likely to offer a grace period (87% vs. 82% for IMOs and 83% of combination associations).
- Associations with an 80% or higher renewal rate are significantly more likely to offer a grace period (88% vs. 79%).

LENGTH OF GRACE PERIOD BY RENEWAL RATE (IMOs)			
	Total (n = 173)	LT 80% (n = 75)	80%+ (n = 98)
One month	27%	35%	20%
2 to 3 months	45%	40%	48%
4 to 6 months	9%	1%	14%
7 to 12	2%	-	3%
More than a year	-	-	-
We don't offer a grace period	18%	24%	14%

- IMOs with an 80% or higher renewal rate are much more likely to offer a grace period. 85% offer a grace period, while only 76% of those with lower renewal rates offer one.
- IMOs with less than an 80% renewal rate are more likely to halt the grace period after one month than those with an 80% or higher renewal rate (35% vs. 20%).

When do you start the renewal effort?

START RENEWAL EFFORT				
	Total (n = 646)	Individual (n = 290)	Trade (n = 196)	Combination (n = 160)
Immediately after welcoming	6%	5%	9%	4%
Prior to 6 months before expiration	4%	3%	7%	2%
At 6 months prior to expiration	3%	2%	7%	1%
5 months prior to expiration	3%	3%	2%	2%
4 months prior to expiration	11%	13%	8%	11%
3 months prior to expiration	40%	42%	28%	51%
2 months prior to expiration	17%	18%	17%	15%
1 month prior to expiration	10%	9%	11%	10%
The month of expiration	5%	4%	7%	3%
Not sure	2%	1%	5%	1%

- 67% of associations begin their renewal efforts at least three months prior to expiration, with the three-month mark being the most popular start time (40%).
- Associations with a renewal rate less than 80% are significantly more likely to wait until the 3 month mark to begin (50% vs. 36%).
- Trade associations are more likely to get an early start on renewal efforts. 33% start before the three-month mark, while 27% of IMOs and 20% of combination associations begin efforts that early.
- 31% of associations with renewal rates at 80% or higher start their renewal efforts inside of three months, while only 25% of associations with lower renewal rates wait that long to begin.

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

END RENEWAL EFFORTS				
	Total (n = 644)	Individual (n = 289)	Trade (n = 195)	Combination (n = 160)
At the month of expiration	3%	4%	3%	1%
1 month after expiration	11%	15%	6%	12%
2 months after expiration	11%	11%	7%	15%
3 months after expiration	21%	17%	24%	25%
4 months after expiration	8%	7%	9%	7%
5 months after expiration	3%	4%	2%	3%
6 months after expiration	13%	11%	16%	12%
More than 6 months after expiration	9%	10%	8%	8%
We don't stop contact	20%	22%	22%	16%
Not sure	2%	1%	3%	2%

- 46% of associations end renewal efforts within three months after expiration.
- 20% do not stop contact with lapsed members, down from 23% in 2016.
- 58% of associations with renewal rates of less than 80% give up renewal efforts by the third month after expiration. By comparison, only 42% of associations with higher renewal rates give up that soon.



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

TOP MARKETING CHANNELS FOR RENEWALS				
	Total (n = 633)	Individual (n = 286)	Trade (n = 191)	Combination (n = 156)
Email marketing	78%	84%	66%	80%
Mail	51%	61%	38%	51%
Staff phone calls	37%	18%	59%	44%
Peer member contacts	18%	15%	23%	16%
Telemarketing	9%	14%	5%	6%
Board phone calls	7%	4%	13%	6%
Chapter phone calls	5%	6%	3%	6%
Employer contacts	4%	1%	6%	6%
Magazine cover wraps	3%	4%	-	5%
Social media contacts	2%	2%	1%	3%
Online digital ads	2%	2%	-	4%
Texting	1%	1%	1%	1%
Fax	1%	-	1%	1%
Renewal app for mobile devices	<1%	-	-	1%
Other	7%	6%	9%	5%

- In total, 78% of associations indicate that email marketing is the most effective marketing channel for renewals.
- All three membership types indicate that email marketing is the most effective marketing channel for renewals (84% for IMOs; 66% for trade associations; 80% for combination associations).
- Overall, mail is the second most effective channel (51%) and staff phone calls are the third most effective (37%).
- Trade associations, however, prefer staff phone calls to mail (59% vs. 38%).
- Mail is a more popular marketing method among larger associations. 78% of IMOs with 20,000 or more members use mail for renewal efforts, while only 40% with 1,000 or fewer members use mail.
- Among associations with an 80% renewal rate or higher, 43% say staff phone calls yield the most membership renewals. Among those with lower renewal rates, only 23% cite staff phone calls.



Do you offer any of the following renewal options? (Check all that apply.)

TOP RENEWAL OPTIONS				
	Total (n = 406)	Individual (n = 208)	Trade (n = 99)	Combination (n = 99)
Installment renewal payments (monthly, quarterly)	37%	32%	63%	21%
Multi-year renewals	36%	43%	14%	42%
Automatic annual credit card renewal	35%	45%	18%	30%
Lifetime membership	24%	34%	4%	23%
Renewal bill-me	21%	13%	31%	26%
Automatic annual Electronic Funds Transfer (EFT) renewals	17%	16%	20%	15%
Early-renewal discounts	17%	15%	18%	18%
Gift or premiums for renewal	7%	11%	1%	5%

- Automatic annual credit card renewals are significantly more popular among IMOs (45%) and combination associations (30%) than trade associations (18%).
- Trade associations are significantly more likely to offer installment renewal payments (63% vs. 32% for IMOs and 21% for combination associations). This marks a return to 2016 levels when 64% of trade associations offered installment renewal payments.
- Multi-year renewals are popular offerings among IMOs and combination associations (43% and 42%, respectively).
- Associations with 80% or higher renewal rates are significantly more likely to offer installment renewal payment plans (47% vs. 23%).
- Associations with renewal rates below 80% are significantly more likely to offer automatic annual credit card renewal (43% vs. 32%).

TOP 3 RENEWAL OPTIONS BY SIZE: INDIVIDUAL			
Up to 1,000 (n = 56)	1,001 to 5,000 (n = 97)	5,001 to LT 20,000 (n = 73)	20,000+ (n = 81)
1. Installment payments	1. Multi-year renewal	1. Multi-year renewal	1. Automatic credit card renewal
2. Automatic credit card renewal	2. Automatic credit card renewal	2. Automatic credit card renewal	2. Multi-year renewal
3. Bill-me	3 (tie). Lifetime membership 3 (tie). Installment payments	3. Lifetime membership	3. Lifetime membership

TOP 3 RENEWAL OPTIONS BY SIZE: TRADE		
Up to 100 (n = 32)	101 to LT 500 (n = 63)	500+ (n = 103)
1. Installment payments	1. Bill-me	1. Installment payments
2. Multi-year renewal	2. Installment payments	2. Automatic annual credit card renewal
3 (tie). Automatic EFT renewal	3. Multi-year renewal	3 (tie). Bill-me
3 (tie). Bill-me		3 (tie). Multi-year renewal

- Automatic credit card renewals are popular across organizations of many different sizes. 35% of all associations use this renewal feature, up from 29% in 2016.

- Automatic credit card renewals are becoming more common, appearing in the top three of all organization sizes, while installment payments, bill-me plans, and multi-year renewals are among the top three for all sizes of trade associations.



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 = 639)	Individual (n = 284)	Trade (n = 195)	Combination (n = 160)
Lack of engagement with the organization	37%	28%	50%	36%
Could not justify membership costs with any significant ROI	28%	20%	43%	25%
Budget cuts/economic hardship of company	24%	9%	46%	25%
Left the field, industry, or profession	24%	27%	16%	29%
Lack of value	23%	28%	22%	16%
Employer won't pay or stopped paying dues	23%	26%	5%	38%
Forgot to renew	21%	28%	9%	23%
Too expensive	20%	25%	17%	14%
Company closed or merged	16%	<1%	43%	11%
Retirement	14%	21%	3%	16%
Student memberships do not convert to full memberships	10%	15%	1%	13%
Can get materials from other members/other sources	9%	10%	8%	8%
Lack of relevance	7%	6%	8%	8%
Disappointment with the benefits/services	6%	7%	6%	4%
Moved	5%	8%	1%	6%
Lost job	3%	5%	1%	4%
Switch to competitor	3%	5%	2%	3%
Young professional memberships do not convert to full memberships	3%	6%	-	1%
Disagree with advocacy position of the association	2%	2%	3%	3%
Poor customer service	1%	<1%	2%	1%
Not sure	1%	1%	1%	1%
Other	6%	7%	6%	6%

- Lack of engagement with the organization is the most commonly-cited reason for non-renewal. 37% of associations list this as a top reason, consistent with 2017 and up from 33% in 2016.
- Among trade associations, 50% cite lack of engagement as the most common reason for non-renewal. This is up from 40% in 2016.
- Among IMOs, 26% cite employers not paying dues for their employees as a major factor for non-renewal; this is down from 37% in 2017.
- 43% of trade associations say that members could not justify membership costs with any significant ROI; this is significantly higher than IMOs (20%) and combination associations (25%).
- 28% of IMOs and 23% of combination associations say members simply forget to renew.

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 = 636)	Individual (n = 285)	Trade (n = 192)	Combination (n = 159)
We don't contact lapsed members	12%	12%	13%	11%
1 year after expiration	18%	17%	17%	20%
2 years after expiration	10%	10%	8%	14%
3 years after expiration	8%	11%	6%	5%
4 to 5 years after expiration	5%	9%	2%	1%
6 or more years after expiration	2%	4%	1%	1%
We continue indefinitely to contact lapsed members	33%	28%	38%	37%
Not sure	6%	5%	7%	7%
Other	7%	6%	9%	6%

- A third of all associations continue to contact lapsed members indefinitely.
- Trade and combination associations are more likely to continue indefinite contact with lapsed members (38% and 37%, respectively vs. 28% for IMOs).
- Other than associations that contact lapsed members indefinitely, most associations do not go beyond three years. 18% of associations make contact for only one year, another 10% for a second year, and another 8% for a third year.
- 12% of associations make no contact at all with lapsed members, up from 10% in 2017.

What channel generates the most reinstated lapsed members?

Please select up to two answer choices

TOP CHANNEL FOR REINSTATING LAPSED MEMBERS				
	Total (n = 581)	Individual (n = 264)	Trade (n = 175)	Combination (n = 142)
Email	68%	73%	58%	73%
Direct mail	34%	44%	19%	35%
Phone	33%	21%	52%	31%
Social media	3%	3%	3%	1%
Online digital ads	1%	2%	-	-
Text	<1%	<1%	-	-
Other	11%	8%	21%	6%

- At 68%, email is the channel that generates the most reinstated lapsed members.
- Among trade associations, phone is the second most popular channel for reinstating lapsed members (52%).
- Direct mail is the second most successful channel for reinstatements among IMOs (44%) and combination associations (35%).



How has the budget changed from last year for each of the following marketing programs?

BUDGET CHANGE FOR MARKETING PROGRAMS IN PAST YEAR*			
TOTAL			
	Increased	Stayed the Same	Decreased
Email	42%	53%	3%
Paid online digital advertising	32%	19%	3%
Promotion to/at your own conferences/trade shows	27%	54%	4%
Association-sponsored events	26%	42%	3%
Local events/meetings	25%	43%	4%
Personal sales calls (not telemarketing)	23%	33%	4%
Direct mail	22%	47%	10%
Public relations	21%	39%	3%
Exhibiting at other conferences	20%	38%	8%
Content marketing/white papers	17%	30%	3%
Advertising in your own publications	16%	57%	4%
Chapter support	12%	34%	3%
Member referral program	12%	28%	4%
Advertising in outside publications	12%	30%	6%
Telemarketing (not personal sales calls)	9%	15%	4%
Texting	4%	10%	1%
Radio or TV	2%	11%	1%

* Did Not Use not shown

42% of associations increased spending on email marketing programs in the past year, while 10% of associations decreased spending on direct mail campaigns.

12% of IMOs decreased their direct mail campaign spending, while only 8% of trade and combination associations did the same.



PARTICIPANT COMMENTS

MEMBER 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.

- Abandoned Cart emails to anyone who did not complete their membership dues purchase. (Combination)
- As part of the onboarding process, we detail to new members the various ways they can become engaged. Each year before renewal time, we look at engagement by each member, and if the member is not engaged in at least two ways, we contact the member by email and phone to make the member aware of other methods of engagement they might find beneficial. Then, with the renewal notices, we thank each member for their engagement, and detail what that engagement has been over the past year. (Trade)
- Courtesy calls about membership being lapsed. (Trade)
- Direct mail post card campaign - playful, colorful, engaging post card campaign with familiar tone - low pressure - multiple ways to contact us. (Trade)
- In years that we have a dues increase, we offer early renewal to take advantage of the current rate before it's raised. (Combination)
- None...we're looking for this kind of help! (IMO)
- Offering a corporate membership package has been hugely beneficial for us. Previously we only offered individual membership and there was a lot of confusion about the benefits and value for money, plus a lot of resources were used to facilitate renewals (many phone calls, emails, etc., for one renewal). (Combination)
- Our CEO or board chair makes a phone call to those we know would like to remain engaged but have yet to renew. In many cases, they need to work out a discount or hardship program. (Trade)
- Our members are located around the world.
- Having a personalized or regional approach works great where the member is interacting with someone they know or who is familiar with their background, culture and perspective. (IMO)
- Reading surveys of membership experience while member is still active has provided insight into problems that can be rectified prior to membership lapse. If we're proactive in searching for concerns and addressing them ASAP, in many cases we can salvage membership. (IMO)
- Text message to mobile followed by an email and then phone call. (IMO)
- The more contact points the better. Renewals often come from persistence and regular reminders. (Combination)
- Waive reinstatement fee and offer additional discounts on continuing education courses. (IMO)
- We developed a three year membership engagement strategy for new members. The objective is to develop a relationship with the new member and fulfill any of their needs so they see the benefit of the membership and learn to use it. We start by contacting the member at the moment their membership is activated, then continue regularly to contact them to see how they are doing, if they need anything and if they are satisfied with their membership. (Combination)
- We recently reviewed our renewal letters, making them more compelling. We added in the "cost per day" to make the dues for individuals seem more reasonable. (Combination)
- We segment the direct mail by expire year so we can measure how each year performs. (IMO)
- When we stopped our mail campaigns, we had a significant drop in the number of renewals. (Trade)



CHALLENGES AND GOALS

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

BIGGEST INTERNAL CHALLENGES TO GROWING MEMBERSHIP				
	Total (n = 625)	Individual (n = 283)	Trade (n = 187)	Combination (n = 155)
Difficulty in communicating value or benefits	35%	31%	40%	36%
Insufficient staff	35%	31%	40%	35%
Difficulty in proving ROI	22%	15%	34%	21%
Membership too diverse, difficulty meeting needs of different segments	22%	22%	23%	20%
Difficulty attracting and/or maintaining younger members	19%	27%	9%	18%
Difficulty identifying/contacting prospects	19%	18%	22%	15%
Insufficient budget	18%	17%	14%	25%
Lack of a strategy or plan	17%	17%	14%	20%
Inadequate association management database	15%	16%	12%	17%
Difficulty in converting student memberships to regular memberships	13%	21%	--	14%
Weak product or service offerings	12%	16%	8%	10%
Lack of marketing expertise	11%	9%	16%	10%
Lack of integration between national and chapters	9%	11%	7%	8%
Inadequate research to understand market	8%	8%	8%	9%
Misalignment of goals between board and executive staff	5%	6%	4%	6%
Other	8%	6%	9%	8%

- The top internal challenges overall, and for all types of associations, include difficulty in communicating value or benefits (35%), and insufficient staff (35%). These top internal challenges echo those from 2017, with a larger percentage of associations mentioning insufficient staff as a top challenge (35% vs. 30% in 2017).
- Trade organizations and combination associations find it challenging to prove ROI (34% and 21%, respectively), while IMOs struggle with attracting and/or maintaining younger members (27%).
- Associations reporting declines in their one-year and five-year membership numbers are significantly more likely to indicate they are challenged by attracting and maintaining

younger members. Associations showing increases in one-year and five-year membership numbers are significantly more likely to struggle with converting student members to regular memberships.

- Compared to associations with budgets of \$20 million or more, smaller associations are significantly more likely to struggle with insufficient staff, insufficient budget, lack of a strategy or plan, and lack of marketing expertise. The larger associations are significantly more challenged by their very diverse memberships, and struggle to meet the needs of their varied member segments.

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Association size is correlated to specific challenges as well. Associations with fewer than 5,000 individual members are more likely to struggle with insufficient staff and insufficient budget, while larger associations (more than 5,000 individual members) are significantly more challenged in

attracting and maintaining their young members. Large trade associations (over 500 members) are significantly more challenged in communicating the value or benefits of their association compared to smaller trade associations.

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

BIGGEST EXTERNAL CHALLENGES TO GROWING MEMBERSHIP				
	Total (n = 624)	Individual (n = 282)	Trade (n = 188)	Combination (n = 154)
Competitive association(s) or sources of information	33%	40%	25%	29%
Perception of the association and/or its culture (i.e., old boy's network, not specialized enough, etc.)	27%	30%	20%	29%
Economy/cost of membership	26%	27%	29%	21%
Lack of brand awareness	26%	28%	22%	27%
Declining member/employer budgets	24%	20%	22%	32%
Industry consolidation/industry shrinkage	20%	11%	37%	14%
Changing demographics of industry/fewer young people in industry	12%	15%	6%	16%
Market saturation	8%	7%	10%	8%
Other	6%	6%	7%	7%

The biggest external challenges include competitive associations or sources of information (33%), and the perception of the association itself and/or its culture (27%). Compared to the findings from 2017, competition from other associations takes over the top spot, replacing the economy/cost of membership as the biggest external challenge to membership. Similarly, the perception of the association (e.g., old boy's network, not specialized enough) is now considered the second biggest challenge to membership, rising from the fifth spot in 2017, and increasing from 24% to 27%. The economy/cost of membership drops to the third biggest external challenge, with 26% of associations citing it as a top challenge, compared to 31% in 2017.

IMOs consider competitive associations and association image to be top challenges, while

trade associations rate industry consolidation/shrinkage (37%) and the economy/cost of membership (29%) to be their biggest external challenges to membership. Combination associations first rank declining member/employer budgets as their top external challenge (32%), and then consider competition and association perception as additional challenges to membership (29% each).

- For associations with increases in their membership over the past year and the past five years, competitive associations or other sources of information are a top external challenge.
- Associations with renewal rates below 80% are significantly more likely to rate competitive associations (40%) and lack of brand awareness (33%) as top challenges compared to

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CHALLENGES AND GOALS

associations with higher renewal rates.

- Associations reporting declines in their five-year membership numbers are significantly more likely to struggle with the perception of the association (34%) and/or declining

member/employer budgets (30%).

- Findings also reveal that as an association's operating budget increases, it tends to struggle more with economic/cost of membership issues, but less with brand awareness issues.

What are your association's top membership goals?

You may select up to two choices.

ASSOCIATIONS' TOP GOALS				
	Total (n = 630)	Individual (n = 284)	Trade (n = 189)	Combination (n = 157)
Increasing member engagement	50%	49%	54%	47%
Increasing membership retention	46%	52%	40%	45%
Increasing membership acquisition	44%	43%	45%	44%
Increasing non-dues revenue from members (attendance at conferences, purchase of services/education, etc.)	17%	14%	18%	20%
Increase understanding of member needs	15%	16%	17%	12%
Increasing dues revenue	15%	11%	17%	19%
Increasing member diversity	8%	11%	5%	5%
Maintaining the status quo	1%	<1%	1%	3%
Other	1%	1%	2%	1%

- Similar to findings from 2017, participating association executives report that increasing member engagement (50%) and increasing member retention (46%) are top association goals this year. Also mirroring last year's results, IMOs and combination associations consider increasing member engagement and member retention to be the top association goals, while trade associations consider membership acquisition to be a higher priority than member retention.
- Associations with member renewal rates at or above 80% are significantly more likely to consider increasing non-dues revenue from members and increasing member diversity to be higher priorities compared to associations with lower renewal rates. Additionally, those with renewal rates under 80% are significantly more likely to report that increasing membership retention is a top association goal.
- Similarly, associations reporting declines in membership over the past year, as well as

declines in renewals overall, are more likely to indicate that member retention is a top priority compared to associations showing increases or no change in their overall renewal rates or one-year membership numbers.

- Moreover, associations reporting declines in their five-year membership numbers and their new members are significantly more apt to consider increasing membership acquisition to be a top goal. Conversely, associations reporting increases in their membership over the past year and the past five years are significantly more likely to focus on increasing their understanding of member needs as a top priority.
- Associations with new member renewals below 80% are significantly more likely to report increasing member retention as a top association goal. Trade or combination associations with more than 100 group/company members are significantly more inclined to indicate that membership acquisition is a top priority.

What are the most significant data challenges your association faces? (Check all that apply.)

DATA CHALLENGES				
	Total (n = 558)	Individual (n = 259)	Trade (n = 160)	Combination (n = 139)
Lack of marketing results tracking and analysis reporting	51%	53%	46%	52%
Inadequate membership dashboards and reporting tools	48%	52%	47%	43%
Poor data hygiene and accuracy	39%	38%	42%	40%
Lack of skilled data professionals to manage and work with our organization's data	39%	42%	32%	42%
Lack of ability to model and segment members and customers	38%	41%	33%	40%
Lack of demographic or firmographic data on members/customers	36%	38%	28%	45%
Decentralized data/lack of a centralized database for member, customer, and prospect data	25%	26%	26%	21%
Lack of ability to import/export new data points and/or data sources.	24%	26%	25%	19%
Other	7%	7%	6%	9%

■ Lack of marketing results tracking and analysis reporting (51%) and inadequate membership dashboards and reporting tools (48%) are the two most significant data challenges facing associations.

■ IMOs and combination associations are significantly more likely to lack demographic or firmographic data on members/customers (38% for IMOs and 45% for combination associations vs. 28% for trade associations).

■ Associations seeing a five-year decrease in membership are significantly more likely to report poor data hygiene and accuracy (47% vs. 35% seeing an increase and 32% experiencing no change).



PARTICIPANT COMMENTS

CHALLENGES AND GOALS

What are your organization's marketing strengths?

- A good, sound membership strategy with the financial resources (and leadership support) to implement. (IMO)
- Cleaned up list to improve our open and click rates and decrease unsubscribe rate. Emails are not too often to be annoying, and we include video to make them more interesting. (IMO)
- Consistent outreach to members and non-members. (Combination)
- Digital marketing. (Trade)
- Digital marketing, creative design, integrated campaigns. (IMO)
- Highly organized, output is at incredibly high level, understanding of members' challenges. (IMO)
- Innovative campaigns, engaged volunteers, relevant content. (Trade)
- Large database of those in the profession. (IMO)
- Member data is very detailed, which allows for more accurate target campaigns. (Trade)
- Mobile responsive website and email design. Large database of contacts to do general blast emails. (IMO)
- New focus on digital and content marketing. (Combination)
- Our board is very engaged and in touch with the real world. (IMO)
- Our social media voice is targeted, authentic, and on-brand. We have a strong sense of what our brand is and who our audience is. (IMO)
- Our targeted audience is small enough that we are able to reach out directly by email and phone and get to know people personally. (Trade)
- Social Media Utilization, Marketing Automation, good creative, compelling content. (IMO)
- Talented staff and good diversity of marketing tools to use. (IMO)
- We are very good at measuring results and ROI. (Trade)
- We have a very strong marketing calendar which allows us to plan effectively with little to no overlap. (Combination)
- We just started working with a company to bring us to the next level! (Trade)
- We've been focusing on testing and data so that we can be sure we're making data driven decisions. This has helped gain support from the board. (IMO)



What are your organization's marketing weaknesses?

- CRM Database Management, Performance Measurement and campaign evaluation. (IMO)
- Data spread across multiple databases. Poor website. (IMO)
- Lack a clear marketing plan. (Trade)
- Lack of cohesive messaging and value proposition. Understaffed. (IMO)
- Lack of new benefits to promote; lack of agility, sometimes, to roll out new programs. (IMO)
- Lack of new contacts/leads for our database. (IMO)
- Marketing reach, identifying potential members not in our database, funding, time, website. (IMO)
- Need monthly installments and a way to save CC info. Better CRM. Better integration with email vendor. (IMO)
- No plan, no different market channels - only email. (Trade)
- Perception that organization serves certain membership constituencies over others. Therefore, lack of relevance to some. (Trade)
- Poor database, overcoming reputational issues from a prior administration. (Trade)
- Relying on institutional knowledge, which is based on anecdote and not on data. (IMO)
- Too many silos in our organization. Everyone markets their own products and services without coordination. (Combination)
- Very diverse body of members in terms of professional responsibilities, budgets, and needs. Hard to reach everybody. (Combination)
- We do not do a good job of telling our story, why it's important to be a part of this organization. (Combination)
- We have a tendency to inundate our members with too many emails, which decreases the open rate. (Trade)
- We have good plans, but we rarely have the bandwidth to do all of the activities we want to. (Trade)
- We have nothing to market, no marketing budget, and have not prioritized staff time to market. (Combination)
- We need a strategy and a vision. (IMO)
- We still send too many emails. (IMO)

QUICK STAT

Lack of marketing results tracking and analysis reporting (51%) and inadequate membership dashboards and reporting tools (48%) are the two most **SIGNIFICANT DATA CHALLENGES** facing associations.



DUES AND MEMBERSHIP STRUCTURE

What membership categories does your association offer?

(Check all that apply.)

MEMBERSHIP CATEGORIES OFFERED				
	Total (n = 609)	Individual (n = 277)	Trade (n = 181)	Combination (n = 151)
Individual Basic	56%	73%	9%	80%
Student	54%	73%	11%	70%
Company/Institutional/Organization	50%	11%	86%	79%
Retired	44%	61%	12%	52%
Associate	38%	34%	45%	37%
Affiliate	27%	26%	29%	25%
Lifetime	26%	35%	8%	32%
Honorary	25%	30%	13%	29%
International	24%	30%	16%	23%
Young Professional (those new to the profession/industry)	18%	26%	6%	20%
Multi-year	17%	24%	3%	22%
Academic	17%	16%	10%	26%
Vendor/Supplier	12%	6%	19%	15%
Transitioning student/Recent graduate	11%	17%	1%	13%
Government/Public sector	11%	7%	16%	13%
Non-profit	11%	4%	17%	14%
Unemployed	10%	12%	2%	17%
Group (multiple individuals)	10%	9%	4%	19%
Individual Plus (added benefits to basic membership)	9%	11%	3%	12%
Military	8%	12%	1%	8%
Online only (paperless)	7%	11%	1%	7%
Family	6%	11%	1%	3%
Consultant	5%	2%	8%	7%
Freemium (no-cost membership)	3%	4%	3%	2%
Publications only	3%	3%	2%	3%
Other	11%	16%	9%	4%

■ The top membership categories are individual basic (56%), student (54%), and company/institutional/organization (50%).

■ 61% of IMOs offer retired memberships.

■ Student memberships are offered by a majority of IMOs (73%) and combination organizations (70%).

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- Those organizations experiencing an 80% or higher renewal rate are significantly more likely to offer a company/institutional/organization membership than those that do not (59% vs. 35%).
- Associations with operating budgets of \$5 million or higher are more likely to offer student memberships than those with lower operating budgets (58% vs. 50%).
- Associations with an 80% or higher renewal rate are significantly more likely to offer associate memberships (43% vs. 30%).

What percentage of your members are students?

If you are unsure, check not sure.

STUDENT MEMBERSHIP			
	Total (n = 290)	Individual (n = 182)	Combination (n = 94)
Mean	13%	15%	11%
Median	8%	10%	7%
0%	2%	3%	1%
1% to 10%	56%	48%	68%
11% to 20%	19%	23%	15%
21% to 30%	13%	15%	10%
31% to 40%	5%	5%	5%
41% to 50%	2%	3%	1%
51% to 60%	1%	2%	-
61% to 70%	-	-	-
71% to 80%	-	-	-
81% to 90%	-	-	-
91% to 100%	<1%	1%	-

- On average, 13% of all memberships are student memberships.
- Associations with renewal rates at or above 80% are significantly more likely to have 10% or less of their membership as student members (65% vs. 51%).
- IMOs with 5,000 or fewer members are significantly more likely to have a smaller percentage (10% or less) as student members than larger IMOs (67% vs. 49%).



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 = 143)	Individual (n = 99)	Combination (n = 41)
Mean	24%	26%	18%
Median	14%	19%	9%
0%	6%	4%	10%
1% to 10%	42%	40%	46%
11% to 20%	9%	10%	7%
21% to 30%	13%	13%	15%
31% to 40%	9%	8%	12%
41% to 50%	8%	8%	5%
51% to 60%	4%	4%	2%
61% to 70%	4%	5%	-
71% to 80%	4%	4%	2%
81% to 90%	1%	2%	-
91% to 100%	1%	1%	-

- On average, 24% of student memberships convert to full memberships. This is down from 29% in 2017.
- Trade organizations are much more likely to convert student memberships to full memberships (42% vs. 26% of IMOs and 18% of combination associations).

- IMOs are more likely to convert more than 10% of student memberships to full memberships (56% vs. 45%).

QUICK STAT

STUDENT MEMBERSHIPS are offered by a majority of IMOs (73%) and combination organizations (70%).



On average, how much are your basic annual membership dues?

ANNUAL MEMBERSHIP DUES STRUCTURE				
	Total (n = 600)	Individual (n = 272)	Trade (n = 177)	Combination (n = 151)
We have a sliding scale	34%	16%	66%	31%
Basic dues	66%	84%	35%	69%



BASIC ANNUAL MEMBERSHIP DUES				
	Total (n = 390)	Individual (n = 229)	Trade (n = 59)	Combination (n = 102)
Under \$50	8%	12%	2%	4%
\$50 to \$99	13%	15%	3%	15%
\$100 to \$149	15%	15%	7%	21%
\$150 to \$199	10%	11%	5%	10%
\$200 to \$299	18%	19%	9%	23%
\$300 to \$399	9%	10%	5%	11%
\$400 to \$499	6%	7%	5%	5%
\$500 to \$749	9%	7%	17%	8%
\$750 to \$999	3%	1%	9%	2%
\$1000 and over	9%	4%	39%	3%
Mean	\$932	\$315	\$4,455	\$281
Median	\$212	\$175	\$645	\$199

- Nearly two-thirds (66%) of associations use basic dues for their membership structure.
- Trade associations (66%) are significantly more likely than IMOs (16%) and combination associations (31%) to use a sliding scale for membership dues.
- The median basic annual membership dues are \$212, though for trade associations that figure triples to \$645.
- Those associations that have renewal rates of 80% or higher are significantly more likely to have a sliding scale (45%) than those that have a lower renewal rate (16%).
- Only 22% of associations with less than a 60% new member renewal rate have a sliding scale; among associations with an 80% new member renewal rate, 51% have a sliding scale.



How often does your association raise membership dues?

MEMBERSHIP DUES INCREASE				
	Total (n = 613)	Individual (n = 279)	Trade (n = 184)	Combination (n = 150)
Annually	25%	19%	34%	23%
Every other year	5%	6%	4%	6%
As needed	52%	57%	44%	53%
Other	10%	11%	9%	11%
Never	8%	7%	9%	8%

- Half of all associations (52%) raise membership dues as necessary, with another 25% raising it on an annual basis.
- Associations with renewal rates of 80% or higher are significantly more likely to raise membership dues annually (30%) compared to those with lower renewal rates (14%).
- At 34%, trade associations are significantly more likely to raise membership dues annually than IMOs or combination associations (19% and 23%, respectively).
- 8% of associations never raise membership dues.

What was the average percentage of your last membership dues increase across all membership categories? If you are unsure, check not sure.

AVERAGE PERCENTAGE OF INCREASE IN MEMBERSHIP DUES				
	Total (n = 450)	Individual (n = 209)	Trade (n = 133)	Combination (n = 108)
Mean	8%	9%	6%	8%
Median	5%	5%	3%	5%
1% to 10%	75%	71%	81%	76%
11% to 20%	12%	14%	8%	11%
21% to 30%	5%	7%	3%	4%
31% to 40%	2%	1%	2%	2%
41% to 50%	1%	2%	-	-
51% to 60%	<1%	1%	-	1%
61% to 70%	<1%	1%	-	-
71% to 80%	<1%	-	1%	-
81% to 90%	<1%	-	-	1%
91% to 100%	<1%	1%	-	-

- The mean percentage increase for all associations is 8%, while the median increase is 5%.
- The overwhelming majority of dues increases were 10% or less.
- Associations with an 80% or higher renewal rate are significantly more likely (83%) to have increases of 10% or less; only 71% of those with lower renewal rates have increases of 10% or less.



QUICK STAT

Associations with an 80% or higher **RENEWAL RATE** are more likely (57%) not to have chapters than those with lower renewal rates (49%).

How would you describe your membership dues structure?

MEMBERSHIP DUES STRUCTURE				
	Total (n = 616)	Individual (n = 279)	Trade (n = 184)	Combination (n = 153)
Everyone pays the same membership dues	21%	30%	8%	20%
The membership dues are based on certain attributes (i.e., qualifications, experience, company size, revenue, geography, etc.)	51%	38%	76%	46%
The membership dues are based on a tiered structure of increasing benefits	12%	13%	7%	16%
The membership dues are based on member-selected benefits they want to receive (à la carte)	1%	1%	1%	1%
Other	15%	18%	8%	16%

- More than half of associations have dues based on certain attributes, such as qualifications, experience, company size, revenue, and geography (51%).
- Basing dues on certain attributes is significantly more likely for trade associations (76%) than for IMOs (38%) or combination associations (46%).
- IMOs and combination associations are significantly more likely to have the same dues for everyone (30% for IMOs and 20% for combination associations vs. 8% for trade associations).
- Associations with renewal rates of 80% or higher are significantly more likely to base membership dues on certain attributes (60%); among those with renewal rates less than 80%, only 38% base membership dues on specified attributes.
- Associations experiencing new member renewal rates of 80% or more are significantly more likely to base membership dues on certain attributes (68% vs. 45% for lower new member renewal rates).



What is your membership dues based on?

BASIS OF MEMBERSHIP DUES	
	Trade (n = 177)
Number of employees in member organization	9%
Annual revenue of member organization	46%
Dues are the same for all members	11%
Other	35%

■ Nearly half of trade associations (46%) base membership dues on the annual revenue of member organizations.

■ Trade associations with renewal rates at or above 80% are more likely to base dues on the annual revenue of the organization (48% vs. 36% for associations with lower rates).

Does your association have chapters?

CHAPTER MEMBERSHIP				
	Total (n = 613)	Individual (n = 278)	Trade (n = 183)	Combination (n = 152)
Yes, chapter membership is optional	25%	29%	16%	30%
Yes, chapter membership is mandatory	17%	26%	7%	15%
No	54%	41%	73%	54%
Our organization is a chapter	4%	4%	4%	2%

■ A majority of associations (54%) do not have chapters. Among trade associations, 73% do not have chapters.

■ IMOs are more likely (26%) to have mandatory chapter membership than trade associations (7%) or combination associations (15%).

■ 29% of IMOs and 30% of combination associations are significantly more likely to have optional chapter memberships; only 16% of trade associations have optional chapter memberships.

■ Associations with renewal rates at or above 80% are more likely (57%) not to have chapters than those with lower renewal rates (49%).



Are there separate dues for chapters?

SEPARATE DUES FOR CHAPTERS				
	Total (n = 281)	Individual (n = 162)	Trade (n = 49)	Combination (n = 70)
Yes, chapter dues are a separate rate	52%	57%	47%	46%
No, overall and chapter dues are combined	48%	43%	53%	54%

■ A majority of associations that have chapters have separate dues (52%).

■ IMO's are more likely to have separate chapter dues than trade or combination associations (57% vs. 47% and 46%, respectively).

Who sets the chapter dues?

SETTING SEPARATE DUES FOR CHAPTERS				
	Total (n = 145)	Individual (n = 90)	Trade (n = 23)	Combination (n = 32)
The national organization	10%	6%	22%	16%
The chapter	90%	94%	78%	84%

■ Most chapters set their own dues (90%).

■ 94% of IMO chapters set their own dues, compared to 78% of trade associations and 84% of combination associations.

Are chapter dues the same for all chapters or do they vary?

DUES BY CHAPTER				
	Total (n = 147)	Individual (n = 92)	Trade (n = 23)	Combination (n = 32)
Same for all chapters	8%	5%	17%	9%
Vary by chapter	92%	95%	83%	91%

■ Because chapters tend to set their own dues, the chapter dues tend to vary. Only 8% of associations with chapters have a consistent dues rate.

■ Associations with consistent dues for chapters are significantly more likely to experience a renewal rate increase.



MARKETING TOOLS

What is your organization's annual operating budget?

ANNUAL OPERATING BUDGET				
	Total (n = 620)	Individual (n = 281)	Trade (n = 186)	Combination (n = 153)
Up to \$1 million	20%	17%	19%	26%
\$1 million to \$4.9 million	36%	35%	38%	36%
\$5 million to \$9.9 million	18%	17%	19%	17%
\$10 million to \$19.9 million	13%	14%	12%	12%
\$20 million to \$50 million	9%	11%	9%	6%
More than \$50 million	5%	6%	4%	3%

- 36% of associations have an annual operating budget of \$1 million to \$4.9 million.
- The median operating budget for IMOs is \$2.8 million, \$2.5 million for trade organizations, and \$2.1 million for combination associations.
- IMOs are more likely to have an operating budget of \$20 million or more (16% vs. 11% for all other associations).
- Operating budgets have no effect on new member renewal rates. Organizations with a less than 60% new member renewal rate have a median operating budget of \$3.2 million; those with a new member renewal rate of 80% or more have a smaller median operating budget of \$2.4 million.

How compelling is your association's value proposition to members?

VALUE PROPOSITION STATEMENT				
	Total (n = 587)	Individual (n = 267)	Trade (n = 179)	Combination (n = 141)
Very compelling	11%	10%	15%	8%
Compelling	39%	40%	43%	35%
Somewhat compelling	41%	39%	39%	48%
Not very compelling	8%	11%	3%	9%
Not at all compelling	1%	1%	1%	1%

- Only half of associations believe they have a compelling or very compelling value proposition.
- Trade associations are more likely to feel their value proposition is compelling/very compelling (57% vs. 49% for IMOs and 43% for combination associations)
- Associations with renewal rates at or above 80% are significantly more likely than those with lower renewal rates to have a compelling/very compelling value proposition (54% vs. 39%).



How many employees does your association have?

EMPLOYEES (MEDIAN)				
	Total	Individual	Trade	Combination
Total full-time permanent staff	19	23	17	15
Total temporary or contract staff	3	3	3	3
Total staff in membership department	3	3	3	2

- The average association has 19 full-time employees, with 3 employees in the membership department.
- IMOs are more likely to have more employees (23) than trade or combination associations.
- Associations with renewal rates at or above 80% have more full-time employees than those with a lower renewal rate (21 vs. 16) and have more staff in the membership department (3 vs. 2).

EMPLOYEES BY ASSOCIATION SIZE: INDIVIDUAL (MEDIAN)				
	Up to 1,000	1,001 to 5,000	5,001 to LT 20,000	20,000+
Total full-time permanent staff	6	8	29	88
Total temporary or contract staff	3	3	2	5
Total staff in membership department	2	2	3	6

EMPLOYEES BY ASSOCIATION SIZE: TRADE (MEDIAN)			
	Up to 100	101 to LT 500	500+
Total full-time permanent staff	7	10	24
Total temporary or contract staff	3	2	3
Total staff in membership department	2	2	3

- Larger IMOs and trade associations have more full-time and membership department staff at all levels of employees.
- The largest associations also have more staff in their membership departments.
- Smaller associations are significantly more likely to have only one employee—or none at all—in the membership department.



QUICK STAT

Associations with an **80% OR HIGHER RENEWAL RATE** are significantly more likely than those with lower renewal rates to have a compelling/very compelling value proposition (54% vs. 39%).

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 = 603)	Individual (n = 272)	Trade (n = 180)	Combination (n = 151)
Response rate analysis	51%	56%	42%	54%
Source code or Keycode capture and analysis	33%	42%	17%	35%
A/B split marketing tests	32%	39%	19%	33%
Return on Investment (ROI)	30%	39%	17%	29%
Cost of acquisition	17%	21%	8%	22%
Data mining/modeling	12%	17%	6%	11%
Lifetime value analysis	10%	14%	6%	10%
Computer matchback to prospect database	10%	15%	2%	10%
Net return after servicing costs	6%	7%	2%	7%
Other	2%	2%	3%	1%
None	29%	22%	40%	27%

- Half of associations use response rate analysis to measure the effectiveness of their marketing campaigns (51%). One-third of associations use source code or keycode capture and analysis and/or A/B split marketing tests to measure campaign effectiveness (33% and 32%, respectively).
- 40% of trade associations do not measure marketing effectiveness, a rate significantly higher than for either IMOs or combination associations.
- Source code or keycode capture analysis is the second-most commonly used metric for IMOs and combination associations. Trade associations are more likely to use A/B split testing over keycode capture analysis.
- Return on Investment (ROI) is another popular means of analysis used primarily by IMOs and combination associations.



Do you divide your membership into different segments for marketing purposes? If so, which of the following best describes your approach to segmentation? (Check all that apply.)

TYPES OF SEGMENTS USED FOR MARKETING				
	Total (n = 608)	Individual (n = 276)	Trade (n = 180)	Combination (n = 152)
Membership level/type	55%	59%	47%	60%
Demographic-based	32%	38%	20%	34%
Job/occupation-based	29%	34%	22%	29%
Model-driven personas	9%	11%	4%	10%
Other	8%	7%	12%	7%
Our organization does not use segmentation	22%	22%	24%	20%

55% of associations use membership level/type segmentation for marketing purposes. It is the most widely used method for all membership models.

9% of associations, predominantly IMOs and combination associations, use model-driven personas.

22% of associations do not use any type of segmentation.

QUICK STAT

ONLINE DIGITAL PLATFORMS are most commonly used for marketing annual conferences/trade shows (79%) and for membership marketing (68%).



Please indicate if you use online digital advertising platforms (e.g., paid Facebook, LinkedIn, AdRoll ads) to market membership or any of the following events/products. (Check all that apply.)

ONLINE DIGITAL ADVERTISING				
	Total (n = 455)	Individual (n = 213)	Trade (n = 130)	Combination (n = 112)
Annual conference/trade show	79%	76%	88%	77%
Membership	68%	78%	46%	74%
Professional development meetings/programs	46%	44%	44%	54%
Publications	41%	42%	35%	47%
Webinars	40%	37%	40%	48%
Volunteer opportunities within your organization	22%	30%	10%	22%
Donations to your association foundation or PAC	20%	26%	14%	18%
Participation in your mentoring program	8%	10%	4%	10%
Other non-dues product or service purchases (other than previously checked)	14%	16%	10%	13%

- Online digital platforms are most commonly used for marketing annual conferences/trade shows (79%) and for membership marketing (68%).
- Trade associations are significantly more likely to use online digital platforms to market annual conferences/trade shows than either IMOs or combination associations (88% vs. 76% and 77%, respectively).

- Associations with renewal rates at or above 80% are significantly more likely to use online digital platforms to market their annual conference/trade show (82% vs. 74% for associations with lower renewal rates).

How has the personalization in your member communications changed over the past year?

PERSONALIZATION OF MEMBER COMMUNICATIONS				
	Total (n = 611)	Individual (n = 276)	Trade (n = 183)	Combination (n = 152)
Increased	55%	55%	57%	53%
Decreased	3%	3%	2%	3%
Remained the same	41%	41%	39%	43%
Not sure	1%	1%	1%	2%

■ A majority of associations have increased the personalization of their member communications over the past year (55%).

■ Associations with renewal rates of 80% or higher are significantly more likely to have increased the personalization of member communications (60% vs. 49%).

Are you using marketing automation to send personalized emails/content to members, customers, and/or prospects?

MARKETING AUTOMATION				
	Total (n = 611)	Individual (n = 277)	Trade (n = 183)	Combination (n = 151)
Yes	49%	51%	43%	54%
No	45%	45%	46%	42%
Not sure	6%	4%	11%	3%

■ Almost half of associations are using marketing automation to send personalized emails and content.

■ 55% of associations experiencing a new member increase have used marketing automation to send personalized content. This is significantly higher than associations that show no change (46%) or a decrease in new members (39%).



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 = 566)	Individual (n = 259)	Trade (n = 165)	Combination (n = 142)
0	1%	<1%	2%	1%
1	17%	20%	14%	16%
2	20%	22%	16%	20%
3	23%	21%	23%	26%
4	6%	4%	9%	6%
5	18%	16%	21%	19%
6	2%	3%	2%	-
7	4%	3%	4%	6%
8	1%	1%	2%	1%
9	<1%	-	1%	1%
10 or more	8%	10%	7%	5%
<i>Mean</i>	4	4	4	4
<i>Median</i>	3	2	3	2

Members receive, on average, four emails per week from an association (median = 3). Close to one-quarter of associations indicate their members receive three emails per week (23%). Most trade and combination associations also report that their members receive about three emails per week (23% and 26%, respectively). IMO's, however, report that members typically receive two emails per week (22%). Of note is that 10% of IMO's indicate that their members receive ten or more emails per week.

Small IMO's, with up to 1,000 individual members, are significantly more likely to send only one email per week, compared to IMO's with more than 1,000 members. Similarly, associations with operating budgets of less than \$5 million are significantly more apt to send only one email per week compared to those with larger operating budgets. In fact, associations with operating budgets of \$5 million or more tend to send five emails per week.



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%	44%	38%
Meetings/conferences marketing	31%	32%	32%	29%
Association news/newsletters	31%	33%	28%	29%
Professional development program marketing	28%	31%	28%	26%
Membership acquisition campaigns	21%	23%	19%	18%

Open rates, for all association types, is highest for membership renewal campaign emails. Trade associations boast the highest percentage open rate for these emails (44%). Association executives indicate that 31% of emails pertaining to meetings/conference marketing and association news/newsletters are opened.

Associations with the smallest operating budgets (up to \$1 million) claim significantly higher open rates for almost all of the different types of emails. Similarly, associations with fewer than 5,000 individual members have significantly higher open rates on all types of emails except membership acquisition campaigns.

QUICK STAT

Associations reporting declines in their one-year membership numbers and declines in their five-year membership numbers are significantly more likely to indicate they are **CHALLENGED BY ATTRACTING AND MAINTAINING YOUNGER MEMBERS.**



QUICK STAT

Compared to the findings from 2017, competition from other associations takes over the top spot, replacing the economy/cost of membership as the **BIGGEST EXTERNAL CHALLENGE TO MEMBERSHIP**.

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

AVERAGE CLICK-THROUGH RATE FOR EMAILS				
	Total	Individual	Trade	Combination
Membership renewal campaigns	23%	23%	27%	19%
Meetings/conferences marketing	19%	19%	20%	17%
Association news/newsletters	18%	19%	18%	16%
Professional development program marketing	18%	20%	17%	15%
Membership acquisition campaigns	12%	14%	11%	9%

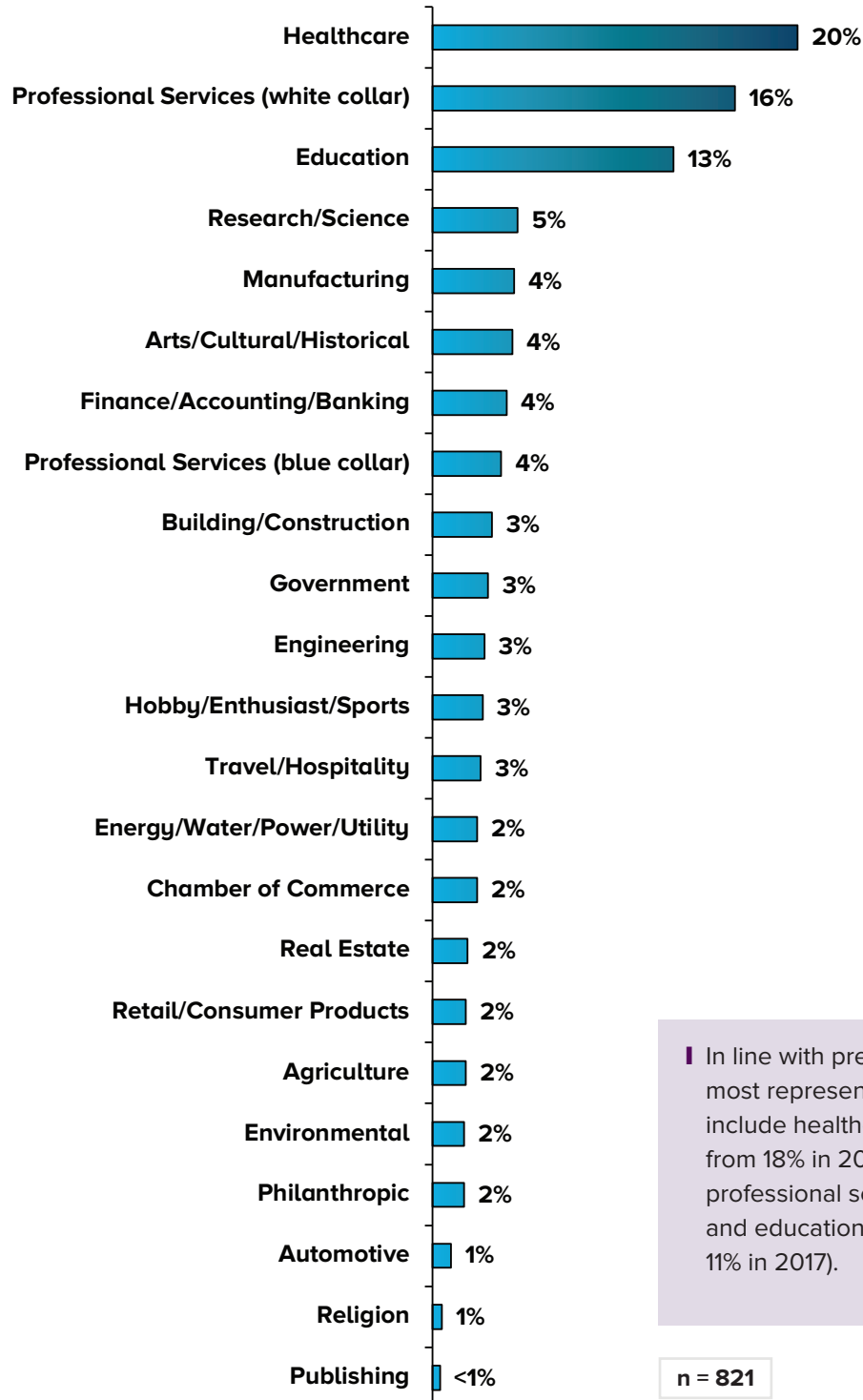
- Associations report the highest click-through rates for membership renewal campaigns (23%). This is the highest for all types of associations, but especially for trade associations (27%). Membership acquisition campaigns have the lowest click-through rates (12%).
- Associations with renewal rates of 80% or higher have significantly higher click-through rates for membership renewal campaign emails and association news/newsletter emails, compared to associations with lower renewal rates. Furthermore, associations with increases or no change in new members over the past year also have significantly higher click-through rates for association news/newsletters emails than do associations with declines in new members over the past year.

- Associations reporting increases in membership over the past year, and the past five years, have significantly higher click-through rates on meeting/conference marketing emails and professional development marketing emails compared to associations reporting declines in membership. Results also indicate that associations with new member renewal rates at or above 80% have significantly higher click-through rates for all of the different types of emails.



ASSOCIATION DEMOGRAPHICS

What best describes your association's industry?



In line with previous years, the most represented industries include healthcare (20%; up from 18% in 2017), white-collar professional services (16%), and education (13%; up from 11% in 2017).

n = 821

How many paid members are in your association?

NUMBER OF PAID INDIVIDUAL MEMBERS			
	Total (n = 580)	Individual (n = 381)	Combination (n = 199)
Up to 1,000	21%	13%	37%
1,001 - 5,000	30%	28%	33%
5,001 - 19,999	24%	28%	18%
20,000 or more	25%	31%	13%

In total, 30% of IMOs and combination associations have between 1,000 and 5,000 individual members, an increase from 2017 (26%). About one-quarter of IMOs and combination associations have between 5,000 and 20,000 individual members, or more than 20,000 individual members (24% and 25%, respectively).

IMOs by themselves are most likely to report 20,000 individual members or more (31%), while combination associations are most likely to report having up to 1,000 individual members (37%).

NUMBER OF PAID COMPANY/GROUP MEMBERS			
	Total (n = 440)	Trade (n = 241)	Combination (n = 199)
Up to 100	15%	12%	19%
101-499	32%	30%	35%
500+	53%	59%	46%

Overall, more than half of trade and combination associations report over 500 company or group members (53%). Close to six in ten trade associations report more than 500 company or group members (59%, up from 52% in 2017), while 46% of combination associations report over 500 company or group members.

Compared to findings from 2017, fewer combination associations report 100 or less company/group members (19% vs. 24% in 2017). There is a corresponding increase in the percentage of combination associations reporting 101-499 company/group members (35%, up from 30% in 2017).



WORDS OF WISDOM: PARTICIPANT COMMENTS

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

- 1 Engage more! Use us more! (Trade)
- 1 I know you're busy but just pay a little attention. (Combination)
- 1 Let us know what we can provide to you that you are not getting elsewhere and let me know how I can help you. (IMO)
- 1 Please log in and update your profile. We use that data to make sure we're making the most of our marketing and outreach efforts and to prevent unnecessary/irrelevant communications from overloading your inbox. Tell us what you need! We think we're doing a pretty good job, but feedback keeps us on the right course. (Combination)
- 1 Read the information we provide, it answers all your questions. (IMO)
- 1 Renew the first time we send you a notice and check your record. We've added more fields, SIG's and specialty areas to serve you better. (IMO)
- 1 Respect your association staff and recognize they work hard on your behalf. (Trade)
- 1 Thank you. I'm so proud of you. (IMO)
- 1 The Board has a role, the membership has a role, and the staff has a role. Let's partner together to find solutions that work for all parties. (Trade)
- 1 The dues you pay are minimal compared to most associations. (Combination)
- 1 What can we do better? (Combination)
- 1 Your passion inspires me daily. (Combination)

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

- 1 Aging out of our membership, not enough younger members to offset them. Declining industry. (IMO)
- 1 Continuing to run on a deficit budget. (IMO)
- 1 Data hygiene and implementation of the member management software. (IMO)
- 1 Data quality, retention, and acquisition goals which make for a great sound bite "10,000 by 2020" but are not realistic. (IMO)
- 1 Declining membership numbers and the retirement of Baby Boomers. (IMO)
- 1 Defining our value proposition. Do we have one? (Trade)
- 1 Excessively poor communications, absent board members, key board member leadership extremely difficult to reach, lack of focus and cohesive direction for association and staff, overall poor leadership. (IMO)
- 1 Financial viability going forward. Adapting to new needs of a changing landscape in our members' industry. (media) (Trade)
- 1 How to simplify and restructure our membership offerings and how to mine all the data we collect with a limited staff. (Combination)
- 1 Low open rates to emails which force us to use more direct mail and phone calls to make member contact. (Trade)
- 1 Membership recruitment and retention numbers. (Trade)
- 1 Mergers and acquisitions within our industry. (Trade)

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WORDS OF WISDOM

- My superiors lack of empathy and ability to see the customers' view. (Trade)
- Our financials. Hard to start new initiatives when you don't have funding to support it. We are looking at other ways to better position ourselves and to leverage free or inexpensive tools to our advantage. (Combination)
- Our industry is quickly changing, and we are doing nothing to help our members plan, prepare, or adapt. (Combination)
- Our membership model is out of date, and the path to changing it will not be easy. (IMO)
- Restructuring the member model - what benefits need to be added? Will this turn around membership? 5 year declines in membership. (Combination)
- Technology changes and competitive landscape that will alter the future of our industry. (Trade)
- The amount of manual processing that our team has to do in order to renew memberships, and the lack of a clearly defined value proposition. Additionally, the fact that our web site and technologies are years behind the current market. (Combination)
- The amount we have invested in our IT systems, and the amount of time we still spend doing things manually. (IMO)
- The disconnect between chapters and national. (IMO)
- The staff culture is poor, and the Board is sheltered from it. (IMO)
- The workload. High revenue goals to achieve, and not enough staff to perform successfully. (Combination)
- Too many projects, not enough time. And I want to do them all. (IMO)
- Velocity of retirements and inexperienced new entrants. (IMO)
- We are attempting to implement a new AMS, e-marketing platform, marketing automation, automatic unsubscribes, member engagement planning, bidding a new website developer and host, and launching all within the next 7 months. (Combination)
- What could I be doing better for the profession? (Combination)

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

- Ability to pay higher salaries and offer more robust benefits. (IMO)
- Add experienced professionals in membership and marketing to staff. (IMO)
- Attitudes and egos. I've always said, when personalities become more important than the mission, it is the beginning of the end of the mission. (Trade)
- Change the attitude if we build it they will come to let's build something people want. (IMO)
- Cost of dues. I'd reduce them and I feel I'd have less people on the fence about dropping, joining or have issues recruiting. (Trade)
- Creating a membership marketing plan and sticking to it. (IMO)
- Disenfranchised staff keeps the organization focus away from important strategies and more into culture. (IMO)
- Find more and better trained staff. (Trade)
- Having a state-of-the-art membership database full of clean data and a well-trained staff to work with it. (Trade)
- Inability to create new products and services that meet the needs of our changing markets or attract new markets. (IMO)

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- Lack of adequate staffing in Marketing and Membership areas. (IMO)
- Micromanaging of our Board. (IMO)
- More emphasis on utilizing member data to make decisions, coming from the top down. We have the information, and the capability, but this needs to be more widely spread throughout the culture. More emphasis on using targeted digital marketing to acquire new members, and the budget commitment to hire a solid digital agency. (IMO)
- More staff and better long term planning to create cohesive marketing strategies for acquisition and member retention. (Combination)
- More staff to perform administrative processes; more money spent on marketing. (Combination)
- Move from paper based membership forms to paperless forms. (IMO)
- Much more integrated and automated membership renewals, payments and processing. (Trade)
- Require that local chapter members be members of the national organization so we have a unified database and voice. (IMO)
- Stop running the organization in silos. (Trade)
- The glacial pace it takes to make decisions. (IMO)
- The inherent conflict of interest by an organization with silos by chapter. (IMO)
- Turn back the clock on our CRM/AMS conversion and take a whole lot more time testing before deploying into production. (IMO)

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

- A catchy subject line goes a long way. (Trade)
- Always test, never assume. (IMO)
- Be creative - try something new. Remember it's not about what you like or respond to - it's about your members. (IMO)
- Begin renewal efforts immediately. Make members' experience personal. (Trade)
- Data is king. The more we know about prospects and members (needs, wants, behaviors, actions), the more effectively we can acquire, engage, and retain them. As long as we have the help of very skilled data analysts. (IMO)
- Direct Mail is still king. Track as much as you can. Test. (IMO)
- Don't be afraid to test. (IMO)
- Engage emotion in the value proposition. (Combination)
- Free trials and comped registration fees go a long way in engaging new or apprehensive potential members. (Trade)
- If you never ask them to join, they won't join. (Combination)
- It cannot be an afterthought. If your value proposition is not compelling, no amount of fancy marketing will matter. (Combination)
- Keep trying things until you find what works. (Combination)
- Lowering the price (i.e., offering a promotion code) isn't always enough to generate joins and/or renewals. The value proposition must always be strong. (IMO)
- Measure ROI. (IMO)
- Measure your results with lifetime value of the member. It's the primary metric. (Trade)

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- Membership is not a sprint. It's a long process that needs constant attention. (IMO)
- Messages/communications have to be frequent and through a variety of channels (email, social media, newsletter). (Combination)
- Never stop marketing. Keep contacting them until they ask you to stop. (IMO)
- Personalization is the key to successful marketing campaigns. (Combination)
- Segmenting is key. Long gone are the days of sending the same message to everyone. (IMO)
- Social media is not a direct acquisition tool. (IMO)
- Targeting and timeliness are key. Tell the right people what they need to know when they need to know it. (Combination)
- The database is everything. (Combination)
- There is no silver bullet. You just have to keep at it with every tool you have. (Combination)
- There is no single answer to membership marketing but a multi-level approach. Not every outreach will click with every member or potential member. Membership marketing is a journey and not a destination. (Trade)
- Track everything. Statistics are our friends. (Combination)
- Understand the wants/needs of members and provide programming to enhance member experiences. (Combination)
- Unless they're dead, never give up any former member as lost. (Combination)
- Use a diverse range of communication methods to increase your chances of reaching people. (Trade)
- When times are tough, marketing should not be cut, it should be expanded. (Trade)
- You can't improve something if you don't measure it. (Combination)
- You need to invest resources to get results. (IMO)

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

- As a membership organization, do we follow what our members want, or act more as an industry association and lead our members to where we think the industry is going? With increasing competition from all sides, we have to be two steps ahead of the game to stay relevant. (Trade)
- Associations will most likely increase ways to be more accessible and portable, either by using popular social media, mobile apps, texting, etc. (IMO)
- Content curation will be huge for professional associations like mine. With a vast amount of information and news available, our members will look to us as a reliable source and filter for the most important information. I also wonder if American associations in general will place greater emphasis on advocacy, given our changing political climate. (IMO)
- Curating the conversation and the information to bring out only the best and most useful and separating out inaccuracies. Continuing to create community (in the broader sense than online communities). Being bolder in offering leadership development opportunities and calling out the opportunities that are already there. (IMO)
- Diversify membership options - meet the people where they want to be. (IMO)
- Find ways to involve younger members in the ways that they want, not the way associations think they want. (IMO)
- I believe there will always be associations - it's imperative to convey your importance. (Combination)

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- I feel that associations may need to evolve into offering more à la carte options, because the one-size-fits-all model is going by the wayside. (Trade)
- I think Artificial Intelligence and the sophistication of social networks will have a profound effect on associations' relevance. (Trade)
- I think associations will continue to use technology to improve how we market to and communicate with members and customers in more relevant ways. (Trade)
- I think there will be more consolidation and only the strong will survive if they continue to increase value. (Combination)
- I think there will be more mergers of "like" organizations. (Trade)
- Increase the speed to new technology adoption. (Combination)
- Increasing use of digital tools. (Combination)
- Like associations always have, they adapt to their members' needs and industry changes. (Combination)
- Micro-membership payments - more pay as you use options. (Combination)
- More electronic delivery of meetings, education, etc. (IMO)
- More focus on training and certification. (Trade)
- Professional associations must resolve an issue or a problem for their members. Need to find a niche that is relevant to the members, and which is also aligned with the association's mission. (Combination)
- Provide members with education that they need to maintain their credentials. (IMO)
- Smarter and more nimble. They will do a better job of determining what they do best - things that they can do that their members can't. (Trade)
- Still need to have the personal touch but with a lot more technology. (IMO)
- Telecommuting will increase, meetings will become more virtual, and the offices will become more quiet. (Combination)
- They must become more digitally adept and quicker to market with new programs and services. They will still have a role as a convener for the profession, but that may not always mean it will be via a face-to-face meeting. (IMO)
- To stay relevant, I think associations are going to have to move away from budgets based solely on dues revenue and find new revenue streams that also bring benefit to members and the industry overall. (Combination)
- We are living in a world of technology and instant information. We need to evolve to keep up with this or we won't remain relevant. We can't keep doing business as usual - sending out lengthy emails/newsletters, expecting people to come to us and search through a wealth of information to find what they want. We need information that they can digest in a minute or so and easily access. We also need to give them what they are looking for - content and information tailored to them, especially in the Amazon era that we live in, the tools to better perform their jobs, and resources to advance in their careers (e.g., mentors, continuing education). (Combination)



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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 40 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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