



# Association Adviser

## 2015 Association Communications Benchmarking Report

The definitive annual report on best practices  
and peer benchmarking exclusively for the  
association community

**NAYLOR**   
ASSOCIATION SOLUTIONS

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

# EXECUTIVE SUMMARY 2015

**Naylor Association Solutions** is more committed than ever to helping associations identify, address and solve their member communication challenges. With the recent acquisitions of **Boxwood Technology**, the leading job and career service provider for associations, and **Timberlake Membership Software**, a leading provider of association management software solutions, Naylor is now in continuous contact with more than 1,800 trade and professional association clients. This gives us an even broader perspective on the community's ongoing needs.

Communication effectiveness – or lack thereof – continues to be one of those clearly identified needs. Since 2010, Naylor has partnered with Dr. M. Sean Limon of the University of Florida's Warrington College of Business Administration and numerous state societies of association executives to identify and deconstruct the top communications concerns cited by North American trade associations and professional societies. We not only study the effectiveness of association communications with members and volunteers, but also the effectiveness of their communication with prospective members, including students and young members of their industry or profession.

Our annual association communication benchmarking study highlights the results of the different methodologies that associations use to tackle these member communication challenges.

**In 2011**, we learned that many associations were operating in silos and believed they were doing a better job of integrating their communications programs than they actually were.

**In 2012-13\***, we discovered that associations greatly underestimated the degree to which overload and communication clutter were preventing them from reaching their members.

**In 2014**, we found that associations truly capable of integrating their communications are more effective than other associations when it comes to engaging their members with better content that considers reader/member/advertiser needs.

**In 2015**, social media eclipsed traditional online communication as the leading channel for high-frequency touchpoints with members. Further, associations are finally starting to chip away at the long-standing challenges of information overload and communication waste. They're also getting a little better at targeting and segmenting their communications efforts, and they're making a substantial push into video and mobile. However, associations still struggle greatly with content relevancy, communication integration and using data advantageously to learn more about their members. And while staffing has increased slightly, it does not seem to be increasing sufficiently to handle the ever-increasing communication workload at today's associations.

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



As mentioned above, the level of communication integration among associations continues to decline, just as it has every year since 2011. Today, just one out of every 16 associations (6%) claims to have a fully-integrated communications strategy. Compare that to 10 percent of associations in 2014 and more than 20 percent of associations in 2011. Further, researchers found that a disturbingly large number of associations admit that they do not have a bona fide mobile, social media or video strategy in place. In fact, nearly one-third of associations (31%) said they were “not sure if members find social media valuable”—up from 26 percent who said so in 2014. What’s more, less than 30 percent of respondents agreed that members were engaging with their video offerings, and less than one in four (22%) said they were pleased with the ROI they were receiving from their video initiatives.

Clearly, mobile, social and video channels are linchpins of many associations’ initiatives to connect with Next Gen. As such, respondents told us they were more concerned about losing new members than they have been at any time since we began this study in 2011. Researchers also learned that associations continue to struggle with content relevance, communication segmentation for different member subgroups and collecting and using data to know their members better.

On the bright side, our research and interviews with association executives show that most associations are well aware of their communication challenges and most are taking steps to address them. The size (and courage) of those steps can vary greatly, but most associations are attempting to adapt to ever-changing media consumption habits, preferences and expectations of their members. For example, when asked what they would do if their publishing/content creation teams received an unexpected 50 percent increase in the annual budgets, about one-third of respondents (34%) told us they would “develop a real mobile strategy” and another third (31%) said they would “put a lot more muscle behind their social media.” Nearly half of associations report they have integrated video in some way into their communication strategies, and one-fourth of respondents (24%) said they plan to integrate video in the near future. On another positive note, our research found that more than half of associations (55%) have optimized their websites for mobile (up from 48% in 2014). Further, two in five (39%) have a mobile conference app (up from 35 percent in 2014) and more than one-third (33%) have optimized their e-newsletters and blogs for mobile devices.

## The 2015 Communications Landscape

Our research confirms the suspicion that associations of all sizes, industries and operating budgets are communicating with members more frequently, via more channels and platforms than ever. For instance, while the frequency of monthly touchpoints with members held steady via print and online channels over the past year, the percentage of associations connecting with members via social media continues to increase. More than 50 percent of associations are connecting with members at least 11 times per month via social media (up from 43 percent in 2014) and 32 percent are connecting at least 20 times per month via social media (up from 27 percent in 2014).

Unfortunately, our study shows that associations are communicating even less effectively with members than they were as recently as three years ago. First, there is the challenge of remaining relevant with members of all ages. Topics such as how-to, best practices, career advice and professional development continue to rise in importance, while association content staples such as lobbying, advocacy, industry news and event coverage continues to decline in importance.

### Topics most important to association members 2011-2015:

2011 rank	2014 rank	2015 rank
1. Industry News/Trends	1. Lobbying/Advocacy	1. How-To/Best Practices
2. Lobbying/Advocacy	2. How-To/Best Practices	2. Career/Professional Dev.
3. Career/Professional Dev.	3. Industry News/Trends	3. Industry News/Trends
4. Member News	4. Career/Professional Dev.	4. Lobbying/Advocacy
5. Coverage of Industry Events	5. Actionable Data	5. Actionable Data

*N = 524 in 2011; 842 in 2014; 704 in 2015 Source: Association Adviser and Naylor Association Solutions, 2015*

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

And while associations have slightly increased the number of staff devoted to publishing/content and social media, they're generally **not** staffing up commensurately to meet the increased workload on those departments. Although resources devoted to mobile and social media have increase substantially since last year's report, nearly 57 percent of the 704 association leaders who responded to our 2015 survey still believe their members ignore at **least half of** the communication pieces sent to them regularly. While that's a 14 percentage point improvement over 2014 levels (71%) and a 5 percentage point improvement over 2011 levels (62%), associations still are hitting members with too much messaging that members either don't find relevant to their own needs or to their staff's needs.

What's more, less than one-third of associations (31%) believed that their communication efforts had improved significantly from three years ago. That's down 5 percentage points from 2014 and down 15 percentage points from 2011. Finally, only about half of associations (55%) self-rated their member communications "above average" or "**best in class**" relative to their peers. That's a slight improvement over 2014 (53%), but not enough to match the 59 percent threshold reported in our inaugural study in 2011. The picture becomes bleaker when you break out the "**best in class**" portion of the aforementioned data. Our research shows that only one out of 18 associations (5.5%) believe their communications are truly best in class—that's down from a level of 7.0 percent in 2014 and 9.1 percent in 2011.

- 41.7% of associations feel understaffed overall
- 43.5% feel their publishing/content creation teams are understaffed
- 43.6% feel their social media teams are understaffed

## Selected trends in association communication effectiveness 2011 to 2015:

	4 years			1 year			<span style="color: red;">●</span> negative trend <span style="color: green;">●</span> positive trend
	2011	2015	% Change	2014	2015	% Change	
Rate own communications "above average" or "best in class" relative to peers	58.5%	55.0%	-3.5%	52.6%	55.0%	2.4%	
Best in class only	9.1%	5.5%	-3.6%	7.0%	5.5%	-1.5%	
Believe own communications have significantly improved from three years ago	45.8%	31.4%	-14.4%	36.4%	31.4%	-5.0%	
Believe members ignore at least half of what the association sends	62.0%	57.4%	4.6%	70.8%	57.4%	13.4%	

N = 524 in 2011; 842 in 2014; 704 in 2015 Source: Association Adviser and Naylor Association Solutions 2015

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## Gaps to fill

To their credit, associations are working hard to shed their stereotype as overly cautious, slow-moving, bureaucratic organizations. They have made significant strides in optimizing their websites and publications for mobile, and in offering members a wide variety of streaming video content, mobile apps and social media outlets. But, there is a big disconnect between associations' willingness to try new forms of communication and their willingness to put a viable strategy behind those channels, much less staff them adequately, support them financially and measure them aggressively.

When asked what they would do with an **unexpected 50 percent increase in their annual budget** (which allowed for multiple answers), associations were more likely to improve and fix things than to invest in "shiny new objects." For instance, 53 percent said they would improve the quality of their existing communication vehicles (same as in 2014), 47 percent of respondents said they would upgrade their publishing tools, technologies and processes (same as in 2014), 46 percent said they would hire more staff (up from 44 percent in 2014), 39 percent said they would develop "a real mobile strategy," (up from 34 percent in 2014) and nearly one-third (32%) said they would "put a lot more muscle" behind a social media strategy, up slightly from 31 percent in 2014.

Just one in four (26%) said they would launch or develop new communications vehicles in 2015, down from 29 percent in 2014.

**If your publishing/content creation team received an unexpected 50 percent increase in its annual budget, how would you recommend they spend it?**

NOTE: Total exceeds 100% due to multiple response option.

	2014	2015	% Change
<b>Improve quality of existing communication vehicles</b>	53.9%	53.3%	-0.6%
<b>Upgrade our publishing tools, technologies or processes</b>	47.7%	47%	-0.7%
Hire more staff	44.0%	46.2%	+2.2%
Develop a real mobile strategy	33.8%	39.2%	+5.4%
Put a lot more muscle behind our social media	30.9%	31.9%	+1%
Launch new communication vehicles	29.3%	26.7%	-2.6%
Other	7.3%	5.8%	

N = 835 2014 | 704 2015, Source: Association Adviser and Naylor Association Solutions 2015

## Communication staffing not keeping pace

Also, data suggests associations are realizing they cannot rely exclusively on technology, outsourcing and volunteers to handle their ever-increasing communication workload. Nearly half (46%) said they would use their budget windfall to hire more staff (up from 44 percent in 2014). Nearly half of association overall (42%) reported that they felt understaffed in 2015, compared to just 2 percent that said they felt overstaffed. What's more, 44 percent of associations felt their publishing/content creation teams were understaffed compared to just 1 percent that felt their publishing/content teams were overstaffed. And 44 percent of associations felt their social media teams were understaffed, compared to less than 1 percent that felt their social media teams were overstaffed. As we'll discuss in more detail later in this report, midsize associations were more likely than small and large associations to feel they were understaffed across all departments, but smaller associations (less than 1,000 members) were the most likely to feel that their publishing, content and social media teams were understaffed.

More than half of associations (53%), still have only one full-time staff member or less assigned to their publishing/content creation team (down slightly from 57 percent in 2014), and more than 70 percent of associations still have only one full-time staff member or less managing their social media teams (down slightly from nearly 75 percent in 2014).

By comparison, the percentage of associations with between 2 and 5 full-time staff members on their publishing/content creation teams decreased to rose slightly to 38.5 percent from 35.3 percent in 2014, that is still below the 42.7-percent level reported in 2012 and 40-percent level in 2011. While the percentage of associations with six-plus full-time staff members on their publishing/content creation teams rose slightly to 8.1 percent from 7.8 percent in 2014 and 5.6

What's more, 44 percent of associations felt their publishing/content creation teams were understaffed compared to just 1 percent that felt their publishing/content teams were overstaffed.

percent in 2012, it is still lower than the 8.5 percent level reported in 2011—a time when the U.S. was just emerging from a severe economic downturn. While our data on social media staffing levels has not been tracked as long as publishing and content creation, it appears that social media hiring is rapidly catching up to other departments. For instance, the number of associations reporting that they had two or more full-time staff managing social media rose to nearly 30 percent from 25 percent in 2014.

### Full-time staff assigned to association publishing/content creation teams

	2011	2014	2015	1 yr. change	4 yr. change
1 or less	52%	57%	53%	-4%	-1%
2-5	40%	35%	39%	+4%	-1%
6 or more	8%	8%	8%	0%	0%

### Full-time staff managing association social media platforms

	2014	2015	1 yr. change
None	17%	17%	N/A
1	57%	53%	-4%
2-5	24%	29%	+5%
6 or more	2%	1%	-1%

### Lack of communication integration, 2011 to 2015:

Today, more than three in five associations (62%) claim to have at least some level of communication integration in place, but that proportion is down from a level of 66 percent in 2014 and nearly 71 percent in 2011.

Among the one-third of associations (38%) that told us they do not have an integrated communications strategy, 10.7 percent expect to do so within the next 12 months, up slightly from 9.7 percent in 2014. As will be shown later in the full report, the lack of an integrated communications platform can have profound, adverse consequences for a membership organization.



## Selected trends in association communication integration, 2011 to 2015:

	4 years			1 year			<span style="color: red;">●</span> negative trend <span style="color: green;">●</span> positive trend
	2011	2015	% Change	2014	2015	% Change	
Associations that consider their communications fully integrated	20.4%	6.1%	-14.3%	10.5%	6.1%	-4.4%	
Associations considering their communications "somewhat integrated"	50.4%	56.0%	+5.6%	55.0%	56.0%	+1%	
<b>Subtotal</b> (all or partially integrated)	70.8%	62.1%	-8.7%	65.5%	62.1%	-3.4%	
Communications not yet integrated, but planning to	9.9%	10.9%	+1%	9.7%	10.9%	+1.2%	
Not integrated	19.3%	27.0%	-7.7%	24.8%	27.0%	-2.2%	

N = 674 in 2011; 1,031 in 2014; 704 in 2015 Source: Association Adviser and Naylor Association Solutions 2015

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## Not asking financial supporters if they're getting ROI

Researchers also were surprised to discover that less than half of associations (47%) regularly ask their advertisers and sponsors if they feel they're getting their money's worth (down from 53 percent in 2014). However, of the associations that **do** ask, three out of four (75%) are incorporating the feedback they get from advertisers and sponsors into their pricing considerations to some extent—up from 60 percent who said so in 2014 and 62 percent who said so in 2011. Researchers wondered if some associations were neglecting to ask members and suppliers about the continuing value of their legacy communication channels in this mobile/social/digital age. As our full report reveals, live events, print magazines, print directories and traditional e-newsletters continue to be among the highest-rated association communication channels.

## Communications strategy recommendations

So, how do resource-challenged associations learn to communicate more effectively with time-pressed, media-saturated members of all ages? How do they do so on each member's preferred terms? How do they customize their offerings to appeal to each member subgroup without becoming overextended? How do they measure progress (or lack thereof) and invest their resources more appropriately to mesh with member preferences? The full report offers actionable recommendations for associations of all sizes to help them access, integrate and measure their communications practices in order to better engage their members and grow their membership base. It also provides compelling statistics that demonstrate that associations with carefully segmented and well-integrated communication programs are able to recruit, retain and engage members more effectively than organizations that don't.





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

## KEY TAKEAWAYS

### Associations made improvements in important areas such as these:

- Relative to peer associations, **55.5 percent considered themselves "Above Average" or "Best in Class"** in 2015 compared to 52.6 percent in 2014.
- The **percentage who felt members ignored at least half of what they sent them declined** to 57.4 percent in 2015 from 70.8 percent in 2014. *Big improvement.*
- The inability to **understand reader/member advertiser needs** was the No. 3 communication challenge in 2014 (17.8% agreed), but only the No. 5 communication challenge in 2015 (cited by 11.8%).
- **Information overload/communication clutter** is still the most frequently cited communication challenge, but it was cited by only 66 percent of respondents in 2015 vs. 70 percent in 2014.
- The inability to **help members find info quickly** was cited by only 41.4 percent of respondents in 2015, down from 47.8 percent in 2014.
- The inability to provide **mobile-friendly communication** was cited by 37.9 percent of respondents in 2015, down from 41.7 percent in 2014.
- More than half (55%) of associations have **optimized their websites for mobile**, up from 48 percent in 2014.
- Associations are **less likely to launch new communication products just because they have extra money** in the budget—26 percent said they would do so today, down from 29 percent in 2014.

## Associations still have a great deal of work to do in areas such as these:

- **"Creating better content to enhance relevance"** is now the No. 1 association communication challenge in 2015, up from No. 2 in 2014.
- **"Utilizing content across communication channels"** is now the No. 2 association communication challenge.
- The **inability to communicate member benefits effectively** was cited by 60 percent of respondents in 2015, up from 55.3 percent in 2014.
- The **inability to customize communications for different member subgroups** was cited by 55.1 percent of respondents in 2015, up **substantially** from 45.6 percent in 2014.
- Print media remains one of the most highly valued channels in the association communication mix, but the average value of print has dropped to 4.13 for **print magazines** (out of a possible 5.0) from 4.2 in 2014. The average value of **printed member directories** had dropped to 3.69 from 3.83 in 2014), **printed show guides** have dropped (3.75 vs. 3.83) and print newsletters dropped (3.64 vs. 3.85) year over year.
- On the digital side, the **average value of online buyer's guides dropped** year over year to 3.46 in 2015 from 3.69 in 2014, and RSS feeds dropped to 2.43 from 2.69.
- On the social media side, Facebook and Twitter showed only small increases in perceived value, LinkedIn and list serves dropped slightly, while **private social networks dropped significantly** (2.47 vs. 2.94).
- The percentage of respondents who **said their organization's communications were "fully integrated"** dropped to 6.1 percent in 2015, from 10.4% in 2014 and 20.4% in 2011!

## About Association Adviser

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