

2011

ASSOCIATION COMMUNICATIONS BENCHMARKING REPORT

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

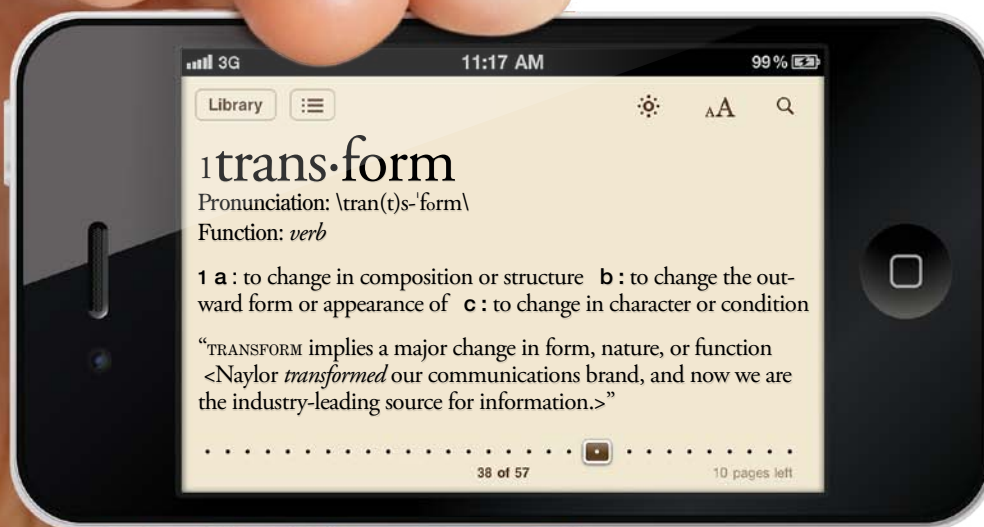
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1. INTRODUCTION

At a time when economic, demographic, technological and social factors are making it tougher than ever for North American trade associations to retain members and maintain their position as industry thought leaders, the pressure on association communication effectiveness is unprecedented.

Our latest research* shows that associations of all sizes and funding levels are communicating with their members at a much higher cadence and in more ways than ever before—but are they communicating effectively? For instance, 90 percent of the 674 respondents to our comprehensive online survey of association leaders stated they were communicating with members more frequently than they have in the past three years, yet fewer than half (45.8%) of respondents felt their members would say they're communicating more effectively with them and more than 62 percent believed their members ignored at least half of the communication pieces sent regularly.

If nothing else, association communication professionals are trying to adapt to the fast-changing media consumption patterns—and expectations—of their members. Case in point: A resounding two-thirds (66.5%) of respondents said their organization's "flagship" communication vehicle has changed over the past three years. While the member magazine remains the communication flagship for more associations (32.3%) than any other vehicle, the member magazine is no longer the association flagship by default. The member e-Newsletter (cited by 24.0% of respondents) and the member website (cited by 20.5%) have rapidly gained adoption as the communication flagship for increasing numbers of associations. This has profound implications for association communication professionals—and membership development teams.

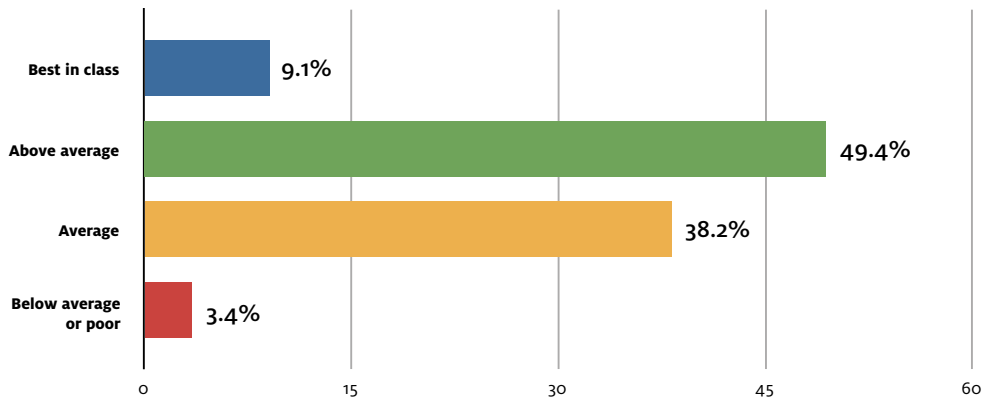
While associations have been willing to adapt to members' changing media consumption patterns and give themselves high marks for doing so, they generally haven't been willing to increase their staffing, resources or adherence to best practices commensurately to meet member demand. Our data further shows that associations generally aren't sure which of their messages are getting through to members and how frequently they should be communicating to members via each of the tools now at their disposal.

Responses indicate that association leaders tend to overstate the degree to which they've improved their member communication efforts. For instance, 89 percent of respondents stated that their communication vehicles had improved over the past three years, and 59 percent rated their member communication vehicles "Above Average" or "Best in Class." Further, while more than 80 percent of respondents said their communication vehicles were well integrated (or soon to be integrated) within their organizations, fewer than half (45.6%) said they could offer advertisers the ability to place synchronized messaging across their various communications channels.

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

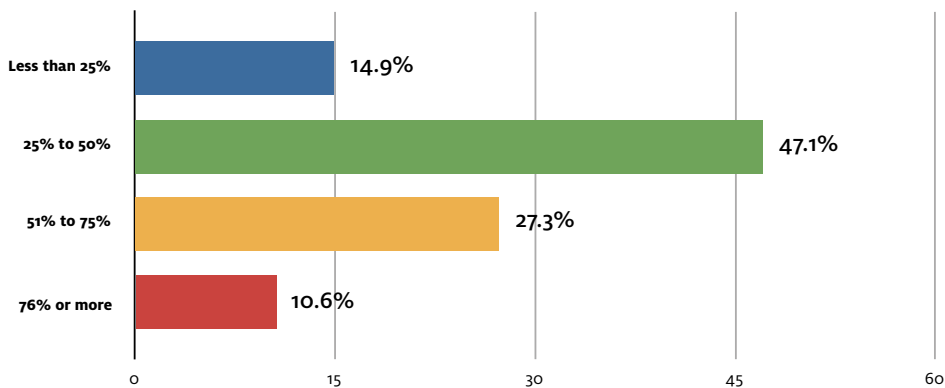
THANK YOU to the 674 association professionals who participated in the 2011 Communications Benchmarking survey. Because of their contribution, the entire association community gains a better understanding of how their peers are communicating with members in today's constantly changing environment.

How would you rate the overall effectiveness of your communications relative to your peers?



Source: Naylor, LLC, and Association Adviser, 2011

What percentage of your overall communication vehicles do you believe members are reading on a regular basis?



Source: Naylor, LLC, and Association Adviser, 2011

Because information overload has been such a pressing concern for many associations, we expected the majority of respondents to have rules in place for governing the frequency and volume of communication pieces they're sending to members. In reality, only half (51.5%) of respondents claimed to have such practices in place, and in all likelihood, compliance is probably lower. For instance, nearly 30 percent of respondents admitted that their organizations didn't strictly enforce the recency/frequency rules they've established, or they cut back "only when the board or members complain." Another 44 percent of respondents said they have had no policy at all for monitoring the frequency of communication to members.

Even though respondents were twice as likely to be putting additional resources into new media (online media and social networking) than into traditional media (print publications and live events), we were struck by the number of respondents who did not seem concerned about monitoring their reputations online. For instance, nearly half of respondents (46%) reported that they assign an administrative or IT

person to handle their online presence and more than one-third (35.4%) of respondents said they do not measure their online and social media offerings.

As one might expect, respondents were more likely to be allocating additional resources to new media (online media and social networking) than to traditional media (print publications and live events), even though the majority of respondents believed their members found traditional media more valuable than new media. **(See Section 4.5 for more on this gap analysis.)**

So how do associations learn to communicate more effectively with their time-pressed, media-saturated members on members' preferred terms? How do they customize their offerings to appeal to member sub-groups? How do they measure their progress (or lack thereof) and invest their resources more appropriately to mesh with member preferences? And how can an integrated communication program benefit them? That's the impetus for this report, prepared by Naylor, LLC, and the *Association Adviser*.

FACT: 90% of respondents say they are communicating with members more frequently than they did three years ago.

2. RESEARCH OBJECTIVES

Researchers wanted to investigate several important areas of association communication trends and best practices that have yet to be thoroughly explored. These areas include: communication strategy; communication channels; success measures and tools; member preferences for customizing and opting in (or out) of communications they receive from their association, as well as associations' recency/frequency policies; the overall integration of their communication offerings and the extent to which associations are adjusting their resource and staffing decisions.

The goal of this report is to provide association leaders with objective data about the state of their communications today and demonstrate how their communications strategies and resource investments stack up to organizations of similar size, type and industry. Another goal of the report is to help association leaders further their understanding of ways in which they can make their print, electronic, social media, live events and mobile communication programs more effective for members and industry suppliers. We also hope this report will aid association professionals in identifying gaps in their current offerings and recommend strategies, tactics and best practices for shoring up those gaps given the staffing and resource parameters of like-minded organizations.

Finally, we investigated the hypothesis that associations with well thought out, and well executed integrated communications strategies that are adequately supported, have better engagement with their members and tend to have better recruitment and retention rates than associations that don't have integrated and sufficiently staffed communication plans. **To that end, we've made a multi-year commitment to this research initiative that will keep us, our clients and our research partners on the forefront of association communication trends and best practices as they emerge and evolve.**

3. RESEARCH METHODOLOGY

After consulting with Naylor, LLC's senior management team, the *Association Adviser Enews* team, the executive directors of six state societies of association executives (SAEs), and M. Sean Limon, Ph.D., oral communication coordinator in the Center for Management Communication at The University of Florida's Warrington College of Business Administration, we constructed a 54-question multiple choice survey with open-ended questions. The goals of the survey were to give the association profession its most comprehensive look ever at membership communication trends, best practices and resource investments of all-size organizations in 90 different industries across North America. Multiple choice questions asked respondents to check the one answer that best described their opinion about an association communication issue, or to select all answers that applied to their experience with an association communication issue. In many cases, respondents were asked to state the degree to which they agreed (or disagreed) with a question, generally on a scale of 1 through 5. Approximately 10 percent of the questions allowed respondents to provide open-ended comments to a question they were answering.

Great care was taken to ensure that the survey would be very thorough and comprehensive in nature, yet one that could be completed quickly, easily and without expensive incentives, telephone follow-up or substantial prodding to take part. Respondents were offered a \$5 Starbucks gift card (via e-mail coupon) as an incentive to complete the survey.

The 2011 Association Communication Benchmarking Survey opened on December 9, 2010, with a live test pilot at an exhibit booth at the annual meeting of the Association Executives of North Carolina (AENC). Approximately 40 attendees completed the survey on a laptop computer provided by the show organizers. The purpose of the pilot test was to ensure that respondents could easily understand the survey questions, navigate through the survey and complete the survey in less than 15 minutes without feeling fatigued or rushed. Participants indicated all criteria were met.

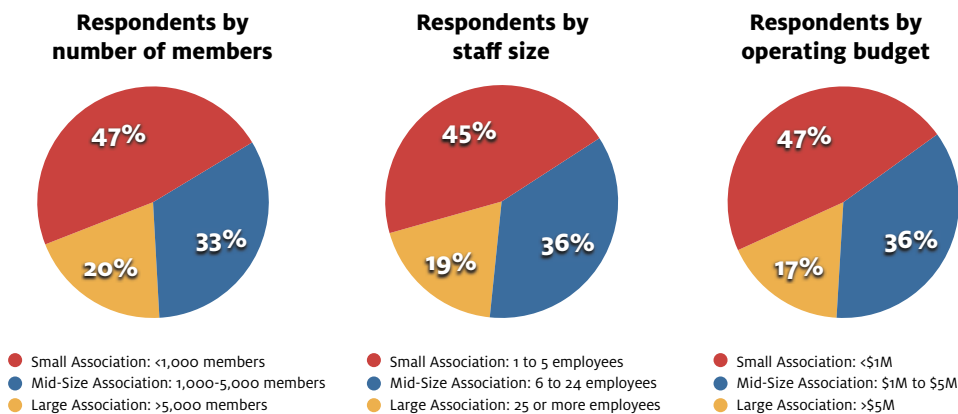
In several waves between December 14, 2010, and January 10, 2011, researchers sent the 54-question survey via e-mail to senior staff at nearly 7,000 North American trade associations and professional societies. Respondents included a mix of small, medium and large organizations composed of Naylor clients, *Association Adviser Enews* readers and SAE chapter members. Researchers sent a brief "pre-announce" e-mail to all survey recipients one week prior to sending the link to the survey. When the actual survey e-mail was sent, recipients were asked to forward the survey link to the most senior member of their organization if they did not feel they met the criteria for "senior management." A follow-up reminder e-mail was sent to all survey recipients one week after they received the link to the survey. At the time the survey was closed on January 28, 2011, a total of 674 surveys had been satisfactorily completed, including 533 (79.1%) that were completed in full.

3.1 About the Survey Respondents

More than 70 percent of the 674 survey respondents classified themselves as senior management, including 55 percent who held the title of executive director, president or CEO. The majority of respondents worked for associations of fewer than 25 employees, fewer than 5,000 members and with annual operating budgets of less than \$5 million. As mentioned earlier in this report, respondents identified themselves with more than 90 industries, but four industries alone accounted for more than 40 percent of the respondent pool: healthcare (16.3%), building & construction (10.9%), education (9.0%) and real estate (5.7%). Slightly fewer than half of respondents could be classified as small organizations, approximately one-third fell under our conventional definition of mid-size organizations and just under one-fifth were classified as large associations:

"Engaging members in 'new media' is a challenge. We still have lots of members in the fax generation."

— **Communications director of a small regional association in the Southeast**



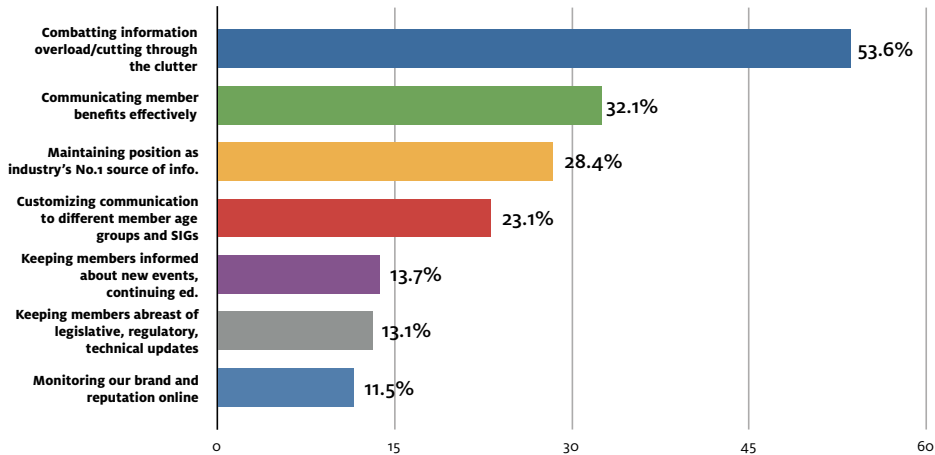
4. KEY FINDINGS

As stated at the outset of this report, combatting information overload was by far the most frequently cited communication concern among association leaders, as 53.6 percent of respondents agreed it was their No.1 communication challenge. Other communication challenges frequently cited by survey respondents included: inability to communicate member benefits more effectively (32.1%); struggling to maintain their position as their industry's No.1 source of information (28.4%); and inability to customize the communication to appeal to their SIGs and sub-communities (23.1%). Customization not only pertained to members with disparate professional interests, but to members of different ages and media consumption habits (see table next page).

4.1. Overall Communication Concerns and Challenges

Researchers were surprised by the apparent lack of concern that the majority of respondents reported about keeping members informed about new events, educational opportunities, regulatory and legislative news and monitoring their online reputations. Fewer than one in seven respondents (14%) expressed concern about any of these issues, suggesting the vast majority of respondents felt they were delivering this information satisfactorily to members.

Top member communication challenges

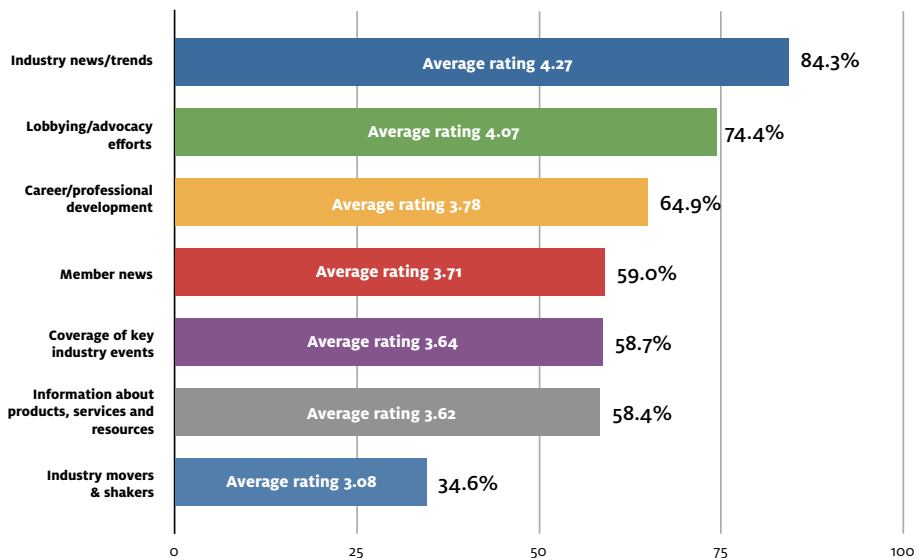


Source: Naylor, LLC, and Association Adviser, 2011

* Total exceeds 100% due to ability to choose multiple responses

Regardless of the communication vehicle used, our data found association leaders and their communications staff continue to put their highest priority on news, trends and legislative matters that affect their industry. This was not surprising. However, we were surprised to learn that associations deemed “careers/professional development” as their third most important type of member information, perhaps reflective of the changing needs of members in this difficult economic climate and tough labor market. Career news trumped a number of traditional association publication staples including member news, event coverage, affinity programs and industry movers and shakers.

Top 7 types of information associations believe are most important to members



Source: Naylor, LLC, and Association Adviser, 2011

*On a scale of 5 (very important) to 1 (not important)

**Total exceeds 100% due to ability to choose multiple responses

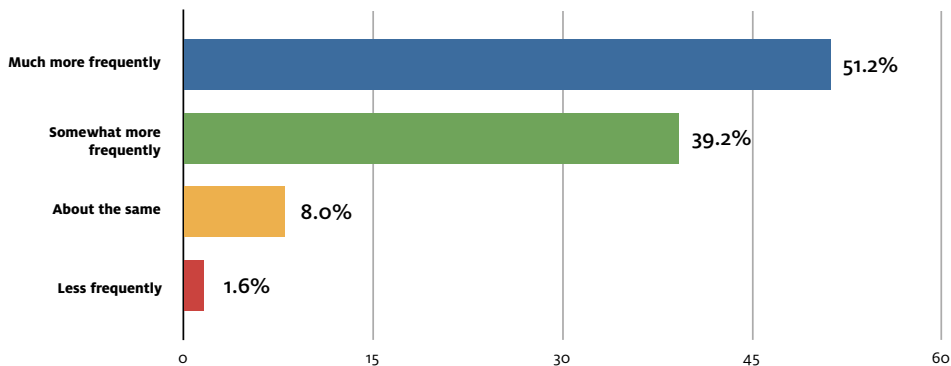
4.2. Member Communication Frequency

Our data clearly shows associations are communicating with their members more frequently than in recent years. On average, they're now touching members 8.3 times per month on a weighted average basis via their print and online publications combined, and nearly one in four (22%) responding associations indicated they're touching members at least 11 times per month or more (i.e., three times per week). That's on top of their social media engagement (e.g. tweets, Facebook posts, LinkedIn updates), which occurs at least weekly, according to 49 percent of respondents, and on a daily basis, according to 12 percent of respondents.

"Our members are very busy, so our biggest challenge is to present our information as concisely as possible for those who have very little time to read it."

— **Communications director for a mid-size teaching association**

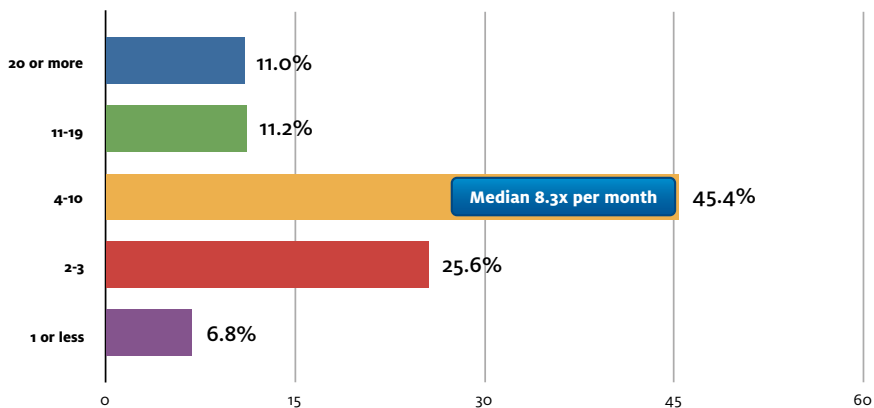
How frequently are you communicating with members compared to three years ago?



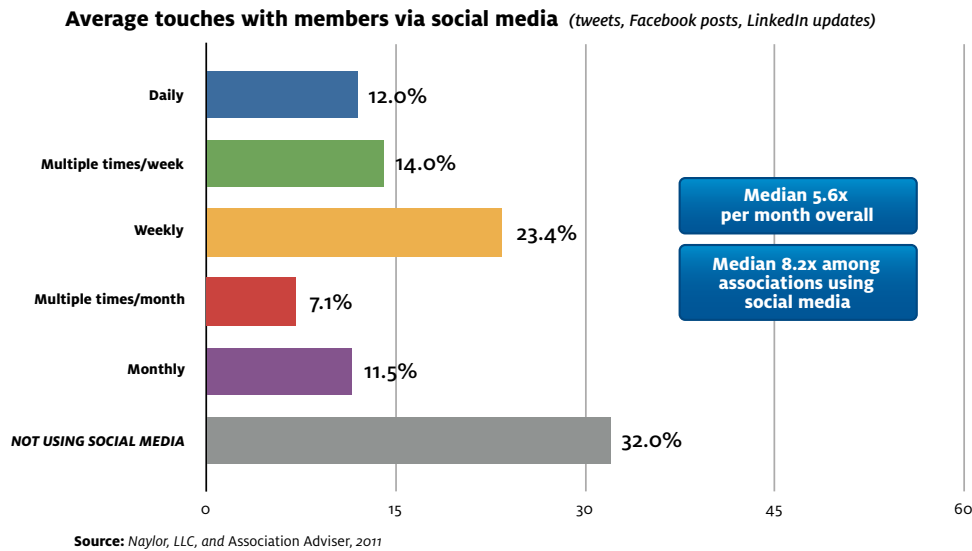
Source: Naylor, LLC, and Association Adviser, 2011

On average, how many times per month are you connecting with members?

Monthly Touches with Members Via Print & Online Vehicles



Source: Naylor, LLC, and Association Adviser, 2011



In terms of the communication vehicles used (see table on page 11), e-newsletters, membership benefits updates and blogs are the three most heavily used on a daily or weekly basis. E-newsletters, membership benefit updates and the digital member magazine are the three most commonly cited communication vehicles used on a monthly or bi-weekly basis. However, when communicating with members on a less frequent basis, printed vehicles were more frequently cited than digital, suggesting that print is still a more preferred delivery medium when more lead time is needed for analysis, in-depth reporting and high-touch design, not to mention reader “shelf life” and retention. For instance, the print edition of the member magazine and member e-newsletter are two of the three most commonly cited vehicles in the bi-monthly or quarterly frequency category, and the print edition of the member directory and member magazine are the two most commonly cited vehicles produced on an annual basis.

Top 3 association communication vehicles used by frequency type

Frequency: Daily or Weekly	Frequency: Bi-weekly/Monthly	Frequency: Bi-monthly/Quarterly	Frequency: Annual
1. E-newsletter 27.7% of associations' e-newsletters are published daily or weekly	1. E-newsletter 49.6% of associations' e-newsletters are published bi-weekly or monthly	1. Member Magazine (Print) 48.3% of print member magazines are published bi-monthly or quarterly	1. Member Magazine (Print) 59.5% of print member directories are published annually
2. Member benefit blasts 25.7% of member benefit email blasts are sent daily or weekly	2. Member benefit blasts 42.2% of member benefit email blasts are sent bi-weekly or monthly	2. Member Magazine (Digital) 38.0% of digital member magazines are published bi-monthly or quarterly	1. Member Magazine (Print) 8.7% of print member magazines are published annually
3. Blogs 20.8% of associations' blogs are published daily or weekly	3. Member Magazine (Digital) 25.1% of member e-zines are published monthly	3. Member Newsletter (Print) 29.1% of print member newsletters are published bi-monthly or quarterly	3. Member benefit blasts 6.7% of member benefit e-mail blasts are sent annually

Source: Naylor, LLC, and Association Adviser, 2011

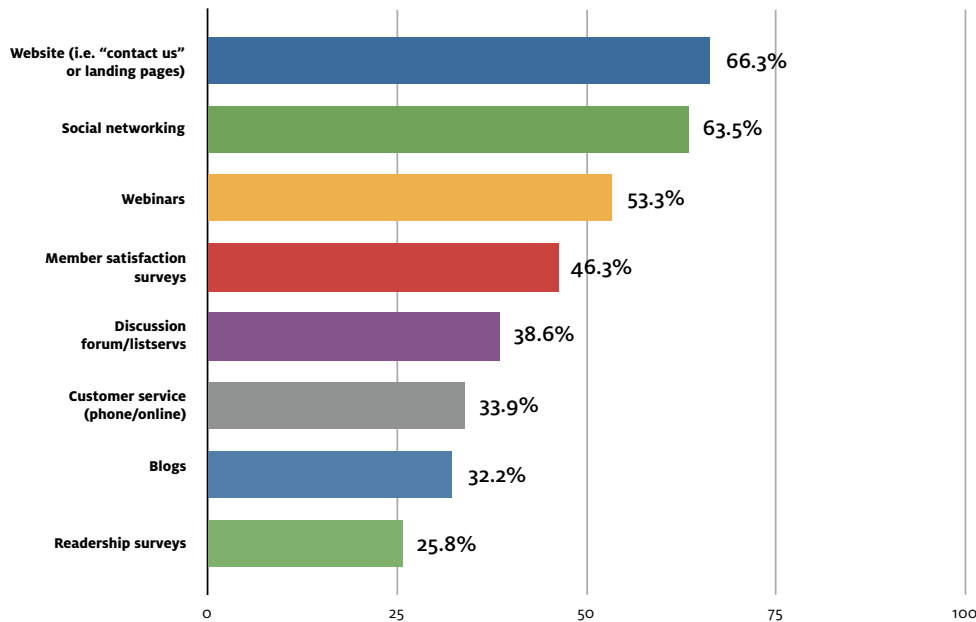
FACT: Nearly two-thirds of association professionals surveyed (62%) believe their members ignore at least half of all communications that come from the association.

4.3 Member Feedback Tools and Techniques

Our data suggests that associations are increasingly harnessing the power of the web to listen to members and gain objective feedback from them (see table next page). For example, two-thirds (66.3%) of survey respondents indicated that they'd be using their landing pages and/or "contact us" links more frequently in the next 12 months to solicit feedback from members. More than 63 percent said they'd be utilizing social networking more frequently, and more than half said they'd be using webinars more frequently. Nearly 40 percent of respondents said their organizations would be using discussion forums or listservs more frequently to gather objective member feedback, and nearly one-third (32.2%) indicated they'd be using their own blogs and/or member blogs for the same purpose.

This data, combined with comments gleaned from Naylor association executive roundtables and *Association Adviser* eNews interviews and reader polls, supports our contention that the trend toward web-based member feedback is being driven by the need for immediate two-way member interaction that is relatively inexpensive, simple to execute, and done as an ongoing process as opposed to a quarterly or annual basis. We've also learned from our discussions with association leaders during the past 12 months that when you're trying to get the attention of time-pressed members, you have to reach them where they're most likely to be spending their time in information-gathering or peer-to-peer communication mode.

Top 8 tools likely to be used more frequently for member feedback during the next 12 months



Source: Naylor, LLC, and Association Adviser, 2011

*Total exceeds 100% due to ability to choose multiple responses

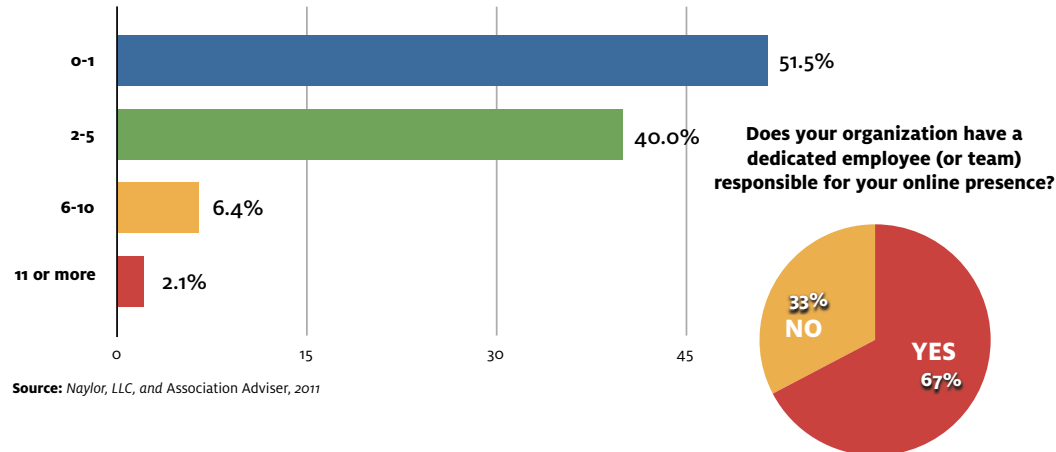
"Our focus is on providing inspiration, thoughtful conversations on ideas and case studies."

— **Executive Director,**
association for professional designers

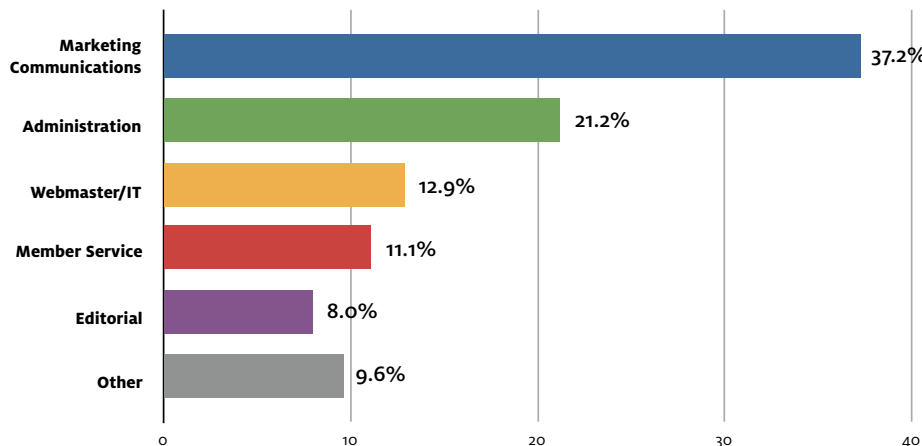
4.4 Communication Staffing

As discussed earlier in this report, associations of all sizes are clearly touching members more frequently with more types of vehicles than ever. But, based on anecdotal feedback from clients and from respondents to *Association Adviser eNews* polls, data suggests that associations generally haven't increased their communications staffing commensurately. More than 90 percent of responding organizations reported they have no more than five employees dedicated to their publishing/communication teams and more than half (51.5%) have only one. While more than two-thirds (67.3%) of respondents now have a dedicated employee or team responsible for their online presence, nearly half (42.7%) told us that function was assigned to the administration, IT or other non-member-facing department—i.e., to employees unaccustomed to crafting content or engaging with members in a thought-leadership dialogue. This leads us to question the quality of content when one utilizes staff whose skill sets typically reside in other areas.

How many full-time staff are assigned to your publishing/content creation teams?



Which department or personnel is primarily responsible for your online presence?



*8% of "Other" indicated shared responsibility amongst staff or management

Source: Naylor, LLC, and Association Adviser, 2011

4.5 Alignment of Communication Resources

The survey data also uncovered some inconsistencies in the association world's allocation of communication resources. For instance, more than half (58.1%) of respondents told us they plan to allocate more resources to social media, particularly to Facebook, Twitter, LinkedIn and video, even though just 34 percent felt their members would rate the social media options from their association "very" or "extremely" valuable. And nearly one-third of respondents (32.1%) said they are increasing their investment in mobile media, despite believing that fewer than 14 percent of their members would consider mobile "very" or "extremely" valuable today.

"You've got to get inside members' heads and find out what really makes them tick."

—Membership director, large national association for educators

Ranking of association communication vehicles by anticipated resource investment (next 12 months)

MEDIA	% Associations Allocating More Resources	% Believing Members Find “Very/Extremely” Valuable	% Associations Requiring Top Management Review	Avg. Rating on Scale of 1 (Poor) to 5 (Excellent)
Social Media	58.1%	34.2%	15.9%	3.35
Online Media	48.1%	60.2%	49.1%	3.95
Live Events	35.3%	69.7%	41.0%	4.30
Print Media	15.9%	55.4%	49.6%	3.97
Mobile	32.1%	13.8%	N/A	3.07

Source: Naylor, LLC, and Association Adviser, 2011

**Totals exceed 100% due to multiple responses*

On the flip side, less than 16 percent of respondents said they are investing more resources in print media, even though 55 percent thought members still find print media “very” or “extremely” valuable, and half of associations (49.6%) still require the member magazine to be approved prior to publication by members of the organization’s top executive committee. Similarly, only 35.3 percent of associations plan to increase their budgets for live events this year, even though nearly 70 percent of respondents thought their members still rated live events “very” or “extremely” valuable, and 41 percent of associations require their conference sessions to be approved in advance by their organization’s top executives. By contrast, only 15.9 percent of associations responding to our survey said their social media sites are carefully reviewed by senior management; only 11.1 percent said their podcasts are similarly vetted; and only 9.4 percent said their blogs are similarly vetted.

4.6 Measuring Communication Effectiveness: Tools and Techniques

Researchers also were struck by the dearth of measurement tools and feedback processes reported by many survey respondents. For example, more than one-third (35.4%) of respondents said they do not measure their online and/or social media offerings; nearly 30 percent admitted their organizations do not strictly enforce the rules they’ve established or they cut back “only when the board or members complain.” Finally, nearly half (44%) say they have no policy at all for monitoring the frequency of communication to members.

When asked how frequently they were using common tools and techniques to measure the effectiveness of their member communication vehicles, our data suggest associations in general are lagging behind their for-profit peers. This lack of measurement discipline may be contributing to respondents’ widely cited concern about the difficulty of maintaining position as their industry’s thought leader. For example, nearly 43 percent of respondents rarely or never use online readership surveys to measure the effectiveness of

their communication vehicles; more than half (56%) don't use online polls, and more than three in four said they rarely use (or simply don't have) such common feedback tools as telephone surveys, advertiser or sponsor surveys, focus groups, road shows, town halls or media coverage.

In addition to gaps in the member feedback loop, we also were struck by widespread gaps in associations' vendor satisfaction loop. Although 40 percent of respondents told us their communication vehicles were required to generate non-dues revenue and a positive contribution margin, only half (55.6 %) of respondents said they check in regularly with their advertisers, sponsors and exhibitors to make sure they're "getting their money's worth." What's more, nearly 40 percent of respondents said they did not factor advertiser or sponsor feedback into their pricing equations or media offerings, which puts them at a competitive disadvantage when competing against for-profit information providers serving their respective industries.

FACT: 70 percent of respondents make their member magazine content available online or in e-zine form, and 58 percent also are developing "online-only" premium content for members.

Feedback tools for member communication vehicles:

Frequency of use	Monthly or more	Quarterly	Annually or other	Don't use
Feedback from board or executive committee	34.8%	36.9%	17.6%	10.7%
Readership surveys (online)	4.7%	12.5%	40.0%	42.8%
Online polls	7.1%	14.9%	21.9%	56.0%
Media coverage	12.2%	7.0%	9.0%	71.7%
Advertiser/sponsor surveys	1.9%	6.1%	20.1%	71.9%
Focus groups	2.9%	5.7%	18.6%	72.9%
Road shows/town halls	4.0%	5.7%	12.5%	77.9%
Phone surveys	2.5%	3.0%	8.9%	85.7%

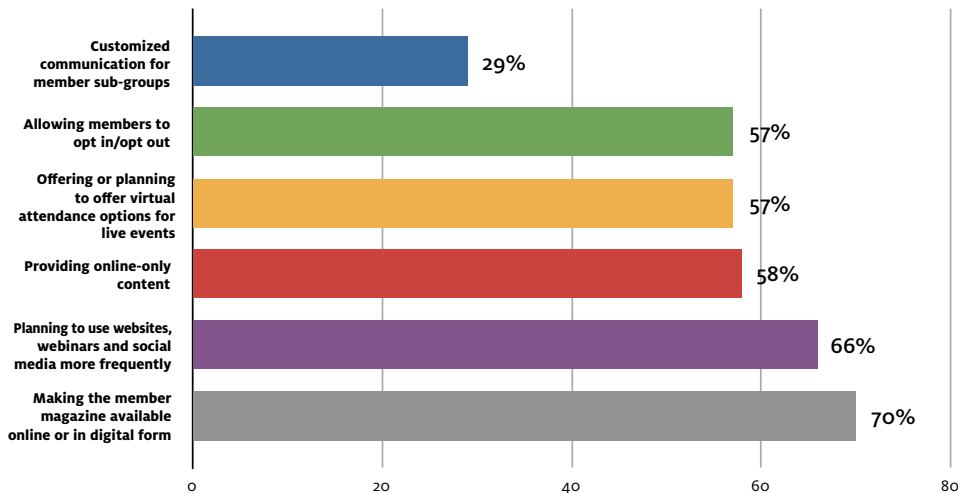
Source: Naylor, LLC, and Association Adviser, 2011

4.7 Signs of Encouragement

At this point, we want to remind readers that the focus of this report is not solely to dwell on resource gaps, inefficiencies or shortcomings of association communication professionals and their staffs. Despite these trying economic times, association communication professionals continue to show great zeal for what they do, tremendous responsiveness to member needs and the resourcefulness to create, explore, build and maintain a staggering number of communication vehicles, considering their modest budgets and staff sizes.

Our data discovered that seven out of 10 (70%) respondents make their member magazine content available online or in e-zine form; 58 percent are developing online-only premium content for members; 57 percent are offering, or planning to offer, virtual attendance options for their live events, and the majority of associations (66.3%) will be using their websites, webinars and social media more frequently to listen to members and gain meaningful feedback from them.

Encouraging developments from the association communication front



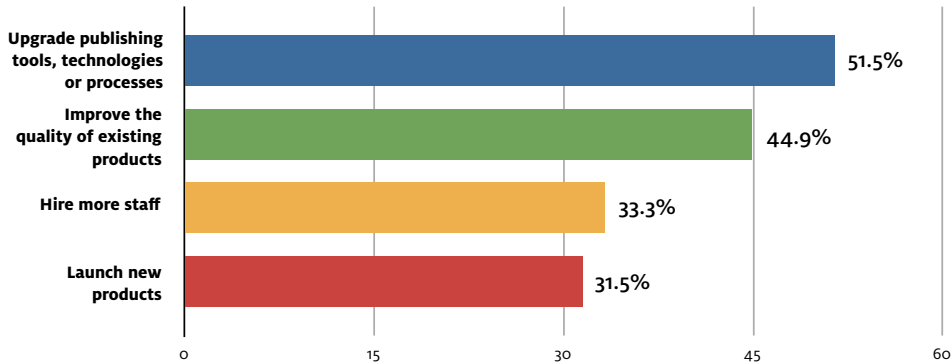
Source: Naylor, LLC, and Association Adviser, 2011

*Total exceeds 100% due to ability to choose multiple responses

4.8 The \$50,000 Budget Question

We also were surprised by the extent to which respondents expressed interest in improving their processes and product quality. When respondents were asked how they would spend an extra \$50,000 if it unexpectedly appeared in their budgets, more than half (51.5%) said they would upgrade their publishing tools and technologies, and 44.9 percent said they would improve the quality of their existing products. These quality-driven responses encouraged researchers as they exceeded choices such as “hire more staff” (33.3%) and “launch new products” (31.5%).

How would you invest an extra \$50,000 in your organization's 2011 communications budget?



Source: Naylor, LLC, and Association Adviser, 2011

*Total exceeds 100% due to ability to choose multiple responses

"Our members don't want to be bothered unless it affects their bottom line."

— Executive director of a mid-size building services association

5. TOP 10 RECOMMENDATIONS FOR ASSOCIATIONS

5.1 Ask before you deliver. As stated earlier in this report, the majority of our survey respondents expressed concern about information overload and "cutting through the clutter," yet those same respondents said they're communicating with members more frequently than ever, and about two-thirds believed their members read less than half of what they send them. Institutional inertia can be a real membership drain, especially for newer members. Have the courage to reassign communication staff and budgets to give members what they really want—not what fits into your view of the ideal staffing headcount or organizational chart.

5.2 Examine your communication strategy and product portfolio at least once every six months.

Don't wait for complaints from members or your board to drive your decisions. Chances are you have multiple products sending similar messages to similar members at the same time. You also may have some legacy products where frequency needs to be adjusted or editorial coverage needs to be more focused and less all encompassing. Sixty-five percent of respondents told us they either do not use, or will not change, the frequency of their readership surveys. But the lines of communication between readers, advertisers and publisher/association must be open and clear of obstruction. In this era of information, more asking and listening must be taking place—not the status quo.

5.3 Communicate on a predictable frequency to build a reading habit with your members. On top of information overload concerns, our research shows roughly 70 percent of associations do not customize their communications for individual SIGs or age groups, nor do they have recency/frequency standards to control how often they're communicating with members. Predictability and consistency are essential to

getting your association information to stand out in a crowd. Members of best-in-class associations know when to expect their most valued and most anticipated communication vehicles, i.e. every morning at 6 a.m.; every Thursday at noon; the 15th of every month.

5.4 Assign the right staff member to the right communication task. Respondents overwhelmingly stated the importance of online and social media to their organizations, but nearly half (46 %) tasked administrative staff or IT personnel with maintaining their online and social media presence. This leads us to question the quality of content when one utilizes staff whose skill sets typically reside in other areas.

5.5 Develop or enhance communication products that your members really want—not to show you're cutting edge. Far too many organizations have told us that they're jumping on the mobile, social networking and digital media bandwagon because they feel pressure to match their peer organizations or their for-profit competitors. Unless you have adequate staffing resources and a real business plan in place to launch new media products, you'll end up with a basketful of half-baked communications offerings that simply confuse members, weaken your brand and overload your member service staff with complaints.

5.6 Get the foundation of your communications house in order before embarking on new additions. As shown in Section 4.8, your peers place a higher priority on improving the quality of existing products than on launching new ones. They even place a higher priority on upgrading their publishing tools, techniques and processes than they do on hiring more staff. Again, if the existing foundation isn't solid, it won't bear the weight of any additional load—and you'll be facing costly and potentially embarrassing repair bills to clean up the damage.

5.7 Consider your institutional stamina before launching new communication products. It's relatively simple to launch new products in the association world, as strict bottom-line criteria are sometimes relaxed; and legacy products often don't have to be shelved in order to make room for them. However, once a new product is out the door, you must be dedicated to supporting it and delivering it on a consistent basis. Otherwise it will never be habit forming for your time-pressed and information-hungry members. Nothing hurts your credibility more than a string of unfinished "new initiatives" that lie dormant—but still live for the world to see—with stale information, broken links and a laundry list of "under construction" signs or "coming soon" promises that never get fulfilled. Be realistic about what you can and cannot deliver to members on an ongoing, consistent and meaningful basis.

5.8 Benchmark your organization against the right competitors and peer organizations. As we've stated throughout this report, association leaders admit they have plenty of room for improvement when it comes to maintaining their No.1 position as their industry's trusted source of information and connecting with members on the right frequency with the right product and the right message. So, why do nearly 60 percent of respondents consider their overall communications efforts "above average" or "best in class"? Perhaps they are at the top of their peer group, but is that really good enough when they're competing with so many other information sources for your members' attention? You must not only monitor what

the for-profit trade publishers are providing to your industry, but what the websites, trusted bloggers, open discussion forums, widely followed social networkers, academic institutions and large companies in your industry are providing their employees—i.e., your members—in terms of career development and resources, legislative awareness and technical skills.

5.9 Use metrics that matter, not what's easiest to measure. Far too many organizations use reader/member surveys to give them the answers they want to hear—not what they need to hear. Asking how many of the “last four” issues they’ve read is not the same as asking how engaged they are with your publication. You need to find out how likely members are to go to your publication’s related websites and social networking resources. How likely are they to e-mail the author of an article they’ve read or visit the author’s blog or social media site? How likely are they to download a white paper or podcast from you—or an advertiser? How likely are they to forward, share, bookmark or “Digg” something they’ve read from your publications?

On the digital side, the vast majority of respondents are relying primarily on “hits” and “traffic” to gauge the value of their website and “opens” to gauge the value of their newsletters. You need to be investigating engagement metrics such as e-commerce transactions, surveys/polls taken, white papers or podcasts downloaded, comments posted or forms requested. How about your entrance and exit pages, referral sources and reciprocal links? On the social media side—where more than 35% of respondents told us they don’t measure anything at all—there’s a lot more to the story than friends, followers and posts. What about re-tweets, time spent per visit, press mentions, membership leads, comments and advertising clicks?

5.10 Break down communication silos. Each of your communication vehicles must have a clearly defined audience, frequency and purpose so you’re covering all the bases that matter to members without duplicating efforts or sending them redundant, or just plain irrelevant, information. One of the most striking findings of our survey was the extent to which associations with fully integrated communication platforms were outperforming associations with platforms that were not integrated. For example, our data suggests *associations with integrated communication programs* were:

- Nearly four times as likely as non-integrated associations to rate their communication initiatives best in class (23.4% to 6.9%)
- Almost twice as likely to say they were above average (52.3% to 28.7%)
- Four times as likely (24% to 6%) to say members were reading at least 75 percent of the publications sent to them regularly
- Almost twice as likely (57% to 29%) to say their communications efforts have improved significantly over the past three years
- Four times as likely (28% to 7%) to say they have frequency/recency rules in place to monitor the volume of member touch points
- One-third less likely (36% to 12%) to have an administrative person handling their online presence.

FACT: Nearly two thirds (66.3%) of associations will be increasing their reliance on webinars and social media as primary tools for listening to members.

Do associations with well-integrated communication programs get higher marks from their members? Our data suggests they do. Associations with integrated communications programs were three times as likely as their non-integrated peers to believe their members would rate their online communications channels as extremely valuable (45% to 15%) and their social media channels extremely valuable (24% to 8%). They also were 10 percent more likely to think members would rate their print publications extremely valuable (34% to 24%). In terms of keeping advertisers and sponsors happy, associations with integrated communications offerings were almost twice as likely as those with non-integrated communication programs (67% to 38%) to ask advertisers if they're getting their money's worth and incorporate that feedback into their media offerings (72% to 38%).

Finally, associations with well-integrated communication programs were nearly twice as likely as those without integrated programs (55% to 29%) to offer advertisers synchronized messaging across channels and to say they have media vehicles with a distinct purpose that each staff member could clearly articulate (90% to 50%).

Our data clearly bears out the hypothesis that organizations with well-integrated communication programs are serving their members, sponsors, volunteers and constituents better than those without integrated communication programs.

6. APPENDIX

6.1 Association Communication Comparisons Based on Membership Size

DEFINITIONS:

- **Small Membership Organization (less than 1,000 members)** (N=317)
- **Midsized Membership Organization (1,000 to 5,000 members)** (N=218)
- **Large Membership Organization (5,001 members or more)** (N=133)

Our data indicates that larger membership associations on average have better-staffed publishing/content creation teams than smaller associations and they are more likely than smaller associations to have a dedicated person or department (with content expertise) handling their on online presence. However, as shown in the table on page 22, smaller associations devote a higher **percentage** of their overall staff headcount to publishing and content creation functions.

Have questions or comments about any of the information found in this report?
Join the discussion in ***The Association Executive Roundtable*** LinkedIn Group.

SUMMARY

	Small Membership <i><1,000 members</i>	Midsize Membership <i>1,000 to 5,000 members</i>	Large Membership <i>5,000+ members</i>
Have more than 10 total F/T staff	20.5%	31.1%	82.6%
Have more than one F/T staff on Publishing/Content Creation teams	35.3%	51.5%	77.3%
Have a dedicated online person/department to handle their online presence	62.0%	67.9%	79.1%
Use admin or IT staff (<i>NOT content/communications</i>) to handle their online presence	37.5%	36.9%	19.8%
Content/communications specialist handles online presence	30.4%	31.6%	54.8%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to multiple response options

"Two years ago we discontinued print publication of our quarterly newsletter to reduce costs. This has been a failure, and feedback from members and vendor members has been overwhelmingly in favor of bringing back a print publication. The problem is still finding a way to pay for it as advertising is down significantly throughout our industry."

— West Coast association membership director

Staffing Summary: How many total full-time staff members work for your association?

	Small Membership <i><1,000 members</i>	Midsize Membership <i>1,000 to 5,000 members</i>	Large Membership <i>5,000+ members</i>
1-5	65.9%	38.6%	8.3%
6-10	13.7%	30.2%	9.1%
11-24	9.9%	21.4%	28.8%
25-50	6.1%	6.0%	23.5%
51 or more	4.5%	3.7%	30.3%
<i>Weighted average staff*</i>	11.6	13.3	45.1

Source: Naylor, LLC, and Association Adviser Enews, 2011
*calculated using range midpoints and value of 100 for "51 or more"

Staffing Summary: How many full-time staff are assigned to your publishing/content creation teams?

	Small Membership <i><1,000 members</i>	Midsized Membership <i>1,000 to 5,000 members</i>	Large Membership <i>5,000+ members</i>
0-1	64.5%	49.5%	22.7%
2-5	32.5%	47.3%	46.4%
6-10	2.3%	3.2%	21.8%
11 or more*	0.7%	0.0%	9.1%
Weighted average staff*	1.8	2.2	4.8

Source: Naylor, LLC, and Association Adviser Enews, 2011

* calculated using range midpoints and value of 15 for "11 or more"

- Roughly two-thirds of small membership associations and one half of midsize associations have only one full-time staff member devoted to their publishing/content creation teams. Nearly 80 percent of large associations have more than one.
- On average, small membership associations have 1.8 full-time staff devoted to their publishing/content creation teams and midsize associations have 2.2.
- On average, large membership associations have 4.8 full-time staff devoted to their publishing/content creation teams—but as shown below, they allocate a smaller proportion of full-time staff resources to this function.

	Small Membership <i><1,000 members</i>	Midsized Membership <i>1,000 to 5,000 members</i>	Large Membership <i>5,000+ members</i>
Weighted Avg. F/T Staff (All)	11.6	13.3	45.1
Weighted Avg. F/T Staff (Publishing/Content Creation)	1.8	2.2	4.8
% FT Staff devoted to Publishing/Content Creation	15.5%	16.5%	10.6%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Small and midsize associations devote a higher proportion of full-time staff resources to publishing and content creation functions than do large associations—roughly 1 out of 6 employees versus 1 out of 10 employees.

Does your organization have a department or dedicated employee responsible for your online presence?

	Small Membership <i><1,000 members</i>	Midsize Membership <i>1,000 to 5,000 members</i>	Large Membership <i>5,000+ members</i>
Yes	62.0%	67.9%	79.1%
No	38.0%	32.1%	20.9%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- As one might expect, the larger an association based on membership size, the more likely it is to have a department or dedicated employee responsible for its online presence.

"We are small enough to make changes at speedboat pace, but we have ocean liner horsepower to implement those changes."

— Executive director of a 1,500-member association for professional educators.

Which department or personnel is primarily responsible for your online presence?

	Small Membership <i><1,000 members</i>	Midsize Membership <i>1,000 to 5,000 members</i>	Large Membership <i>5,000+ members</i>
Marketing	24.2%	24.1%	40.6%
Administration	28.5%	22.5%	0.9%
Editorial	5.9%	7.5%	14.2%
Webmaster / IT	9.0%	14.4%	18.9%
Member services	15.2%	8.6%	5.7%
Other	17.2%	23.0%	19.8%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The larger an association, the more likely it is to have not only a department or dedicated staff member responsible for its online presence—but staff with expertise in editorial, marketing or communications handling its online presence.
- Larger associations generally have more staffing resources available for communications functions, but our data suggests they face a wider variety of communications challenges—and member expectations—and may not be sufficiently staffed to handle them all.
- Larger associations are the group most likely to be under pressure to customize communications for different member sub-groups.
- Larger associations are the group most likely to feel the need to have "fully integrated" communications platforms.
- Larger associations are the group most likely to need cross-platform advertising and sponsorship packages for their supplier members.

- Larger associations are the group most likely to be battling multiple for-profit competitors for their members' attention.
- Larger organizations are more likely than smaller organizations to have "recency/frequency" rules in place and to have more sophisticated metrics for measuring their online and social networking efforts.
- Yet, larger associations also seem to have more communications waste and are more likely to be running their communication programs as cost centers as opposed to profit centers.
- Ironically, larger membership associations were the size group most likely to rate their own communications efforts as "above average" or "best in class."

How would you rate the overall effectiveness of your communications relative to your peers?

	Small	Midsize	Large
Best in class	9.8%	5.3%	13.9%
Above average	46.4%	50.5%	54.1%
Average	41.4%	39.9%	28.7%
Below average or poor	2.4%	4.3%	3.3%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of size, information overload was the most frequently cited communications challenge across our survey sample—although it was most pronounced at larger membership organizations (see table on page 25).
- Larger membership organizations also were most likely to be wrestling with ways to customize their communications for various member age groups and special interest groups.
- While larger associations, to their credit, were more likely than midsize and smaller associations to have communication "recency/frequency" rules in place (65% versus 43% and 31%, respectively), they were *less likely* than smaller organizations to be enforcing those rules.

% Associations communicating "much more" frequently with members than 3 years ago:

Small	48.5%
Midsize	48.8%
Large	63.2%

% Associations that believe members read only 25% to 50% of what's sent to them:

Small	43.7%
Midsize	48.9%
Large	51.9%

% Associations where communication vehicles operate as cost center vs. profit center:

Small	16.9%
Midsize	20.1%
Large	23.3%

Large association stress points

Communications Challenge	Small	Midsize	Large
Combatting information overload/inbox clutter	51.5%	53.4%	59.3%
Customizing communication to different member age groups and SIGs	15.7%	29.8%	30.1%
Recency/frequency rules not strictly enforced	20.8%	26.0%	32.5%

Source: Naylor, LLC, and Association Adviser Enews, 2011

Midsize association stress points

Communications Challenge	Small	Midsize	Large
Communicating member benefits effectively	31.7%	34.1%	28.5%
Maintaining position as industry's No.1 source of information	28.7%	31.3%	23.6%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- **Midsize membership organizations** tend to be most likely to struggle with ways to keep members aware of the benefits to which they are entitled.
- **Midsize organizations** tend to struggle the most to maintain their status as the most trusted source of information in their respective industries.

Small association stress points

Communications Challenge	Small	Midsize	Large
Keeping members informed about new events, continuing education	15.0%	13.5%	11.4%
Keeping members abreast of legislative, regulatory, technical updates	16.7%	11.5%	6.5%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Like their larger counterparts, smaller membership organizations cite information overload as their top communication challenge.
- While all associations lament their staffing challenges, smaller membership organizations are the group most likely to feel inadequately staffed to handle their communication challenges.
- Smaller membership organizations are the group most likely to be struggling with ways to keep members informed about association events, continuing education opportunities and their industry's legislative, regulatory and technical updates.

"We once published a weekly newsletter and that seemed challenging. Now, with no extra staff (albeit with more streamlined production methods) we are producing a weekly newsletter and a daily newsletter, plus publishing content just for the web and posting to Facebook, Twitter and producing podcasts and short video clips to accompany our web presence."

— VP of publishing for a large Washington, D.C.-based association

How frequently are different-sized organizations touching their members?

As might be expected, larger organizations communicate more frequently with members than other sized associations, (9.7 times per month via print and online), but smaller organizations are communicating with their members at least as frequently as midsize organizations, if not more.

Monthly communication frequency via print and online vehicles

	Small Membership	Midsize Membership	Large Membership
Median	7.9	8.1	9.7
10+ times per month	21.1%	19.9%	29.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Smaller membership organizations do seem to be holding their own on the print and online communication side, but our data shows they're less actively using social media.
- This trend surprised us due to social media's relatively low cost and ease of implementation.

Frequency of member connection via social media channels (e.g. Facebook, Twitter, LinkedIn)

	Small Membership	Midsize Membership	Large Membership
Daily	6.8%	10.8%	27.4%
Multiple times per week	10.6%	14.2%	22.2%
Weekly	20.5%	26.0%	25.6%
Do not use social media	40.3%	31.9%	11.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011

Encouraging developments

While much of our analysis has been focused on the areas of association membership communication most needing improvement, we found great strides being made by associations in all size categories:

- On the **large membership association** front, roughly four in five survey respondents said they have some type of recency and frequency rules in place—and more than 70 percent allow members to opt in (and out) of the communications they wish to receive.
- More than half of **midsize membership associations** told us they are making their member magazine content available on the web and more than one-third are actively investing in mobile media applications and platforms.
- On the **small association** front, more than half of respondents said they are using webinars and social media to listen to their members.

6.2 Association Communication Comparisons by Respondent Job Title

DEFINITIONS:

- **Exec Director/CEO** refers to executive directors, CEOs or presidents of associations (N=324)
- **Publish/Comm Staff** refers to vice presidents or directors of communications/publications, managers or coordinators of communications/publications (N=115)
- **Membership** refers to vice presidents, directors, managers or coordinators of membership development or marketing (N=135)

"Our biggest challenge is really understanding the opportunities in publishing without being overwhelmed by its complexity."

— Senior executive at a large healthcare association

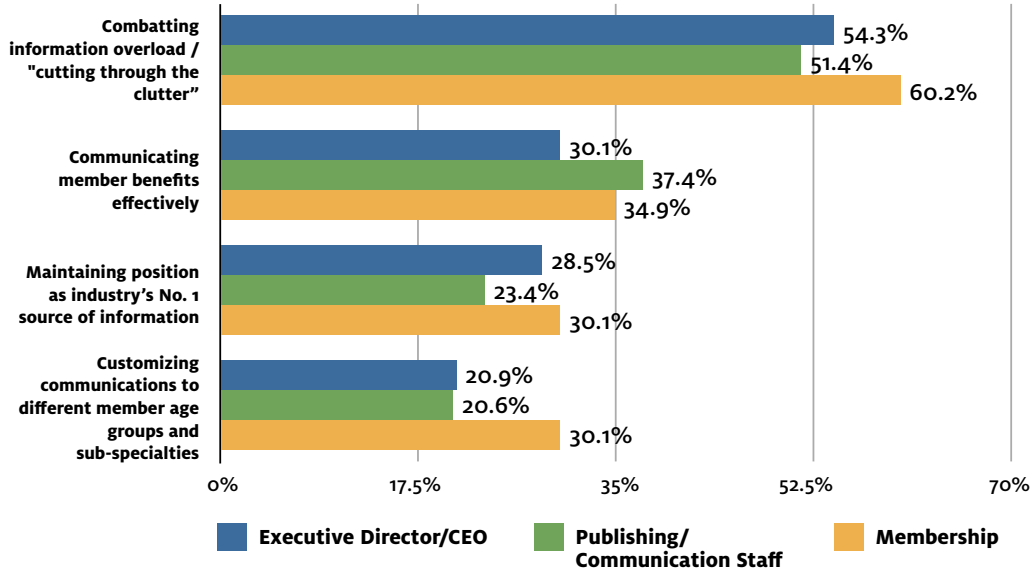
Quick Summary

	Executive Director/CEO	Publishing/Communication Staff	Membership
% Over Age 50	66.0%	36.7%	29.9%
Rate communication vehicles "Above Avg" or "Best in Class"	59.3%	64.8%	55.9%
Rate communication vehicles "Below Avg" or "Poor"	2.6%	1.9%	6.0%
Communications have "Improved Significantly" over past 3 years	43.9%	49.1%	46.4%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- The association C-Suite is far more likely than other segments of our survey population to be over the age of 50.
- We believe this age skew partially (but not completely) explains the degree to which executive directors are less likely than other members of our survey population to say their organizations are planning to invest more resources in online, social and mobile media.
- Respondents who classified themselves as publishing or communications leaders are more likely than other respondents to rate their organization's communications vehicles "above average" or "best in class."
- Membership directors, who must reinforce their association's value proposition, are more likely than other respondents to give their organization's publication average or inferior ratings.
- Less than half of survey respondents, regardless of job title, believe their organization's communications vehicles have improved "significantly over the past three years."
- As might be expected, publishing/communications leaders are somewhat less pessimistic than other survey respondents about the improvement of their organization's member communication vehicles.

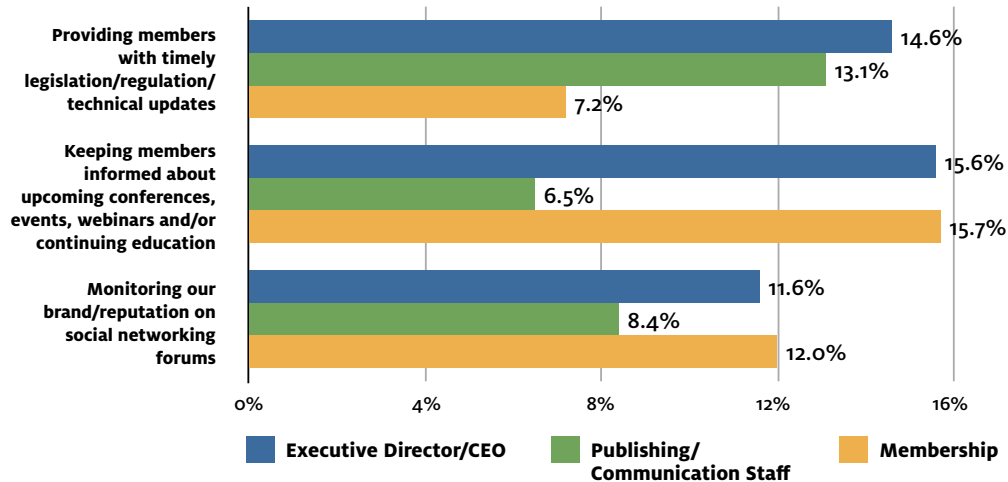
What are the biggest communication challenges you're having with members?



Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- Membership directors are more likely than other survey respondents to cite information overload, industry thought leadership and information customization as key communications challenges for their organizations.
- Ironically, publishing/communications leaders, not membership directors, are more likely to say their organization has trouble effectively communicating membership benefits.

What are other key communication challenges you're having with members?



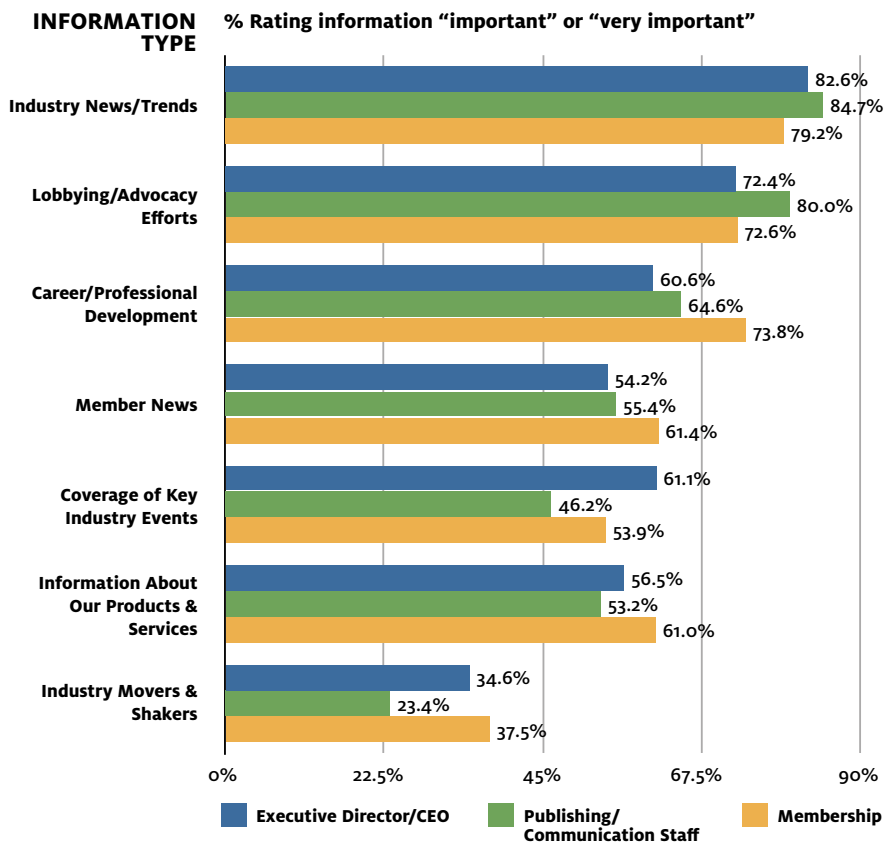
Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- Executive directors tend to be the survey respondents most concerned about providing members with timely legislative, regulatory and technical updates.
- Executive directors and membership directors are the respondents most concerned about keeping members informed about upcoming events, continuing education opportunities and their organizations' online reputations.

"Communicating with members as opposed to communicating to members is our biggest challenge."

— Executive director of a midsize building and construction association

Which types of association information are most important to your members?



Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- The overall relative importance of each type of information follows the order displayed above.
- Executive directors feel more strongly than their peers about the importance of covering key industry events.
- Membership staff feel more strongly than their peers about the importance of career development, member news, affiliated products and services and industry movers and shakers.
- Publishing/communication staff feel more strongly than their peers about the importance of industry news/trends and the association's lobbying and advocacy efforts.

Ranking of information priority based on job function

<i>(Top three responses highlighted in each column)</i>	Executive Director/CEO	Publishing/Communication Staff	Membership
Industry News/Trends	#1	#1	#1
Lobbying/Advocacy Efforts	#2	#2	#3
Career/Professional Development	#4	#3	#2
Member News	#6	#4	#4
Coverage of Key Industry Events	#3	#6	#6
Info. About Our Products & Services	#5	#5	#5
Industry Movers & Shakers	#7	#7	#7

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of job function, “Industry News & Trends” is the highest priority information category for our survey respondents.
- “Lobby/Advocacy” is the second highest priority for association executive directors and publishers and third highest priority for membership directors (they place a higher priority on career development information).
- Executive directors also place a high priority on covering key industry events—not a high priority for other survey respondents.

Overview of member communication changes based on job function

(category leader highlighted in each row)

	Executive Director/CEO	Publishing/Communication Staff	Membership
We're communicating with members “much more” frequently than three years ago?	47.5% agree	52.4% agree	59.5% agree
We enforce rules about how often we touch members	11.4%	20.2%	20.2%
We have NO rules about how often we touch members	52.2%	35.6%	26.2%
We have an employee dedicated to handling our online presence	61.2%	77.0%	71.4%
Our primary member magazine should be published at least 10x/year	22.0%	32.0%	26.3%
The ideal frequency of our member magazine has changed since 2008	36.4%	33.3%	39.0%
Our publishing/content creation team consists of 0-1 staff	36.9%	33.4%	41.0%
Our publishing/content creation team consists of 2-5 staff	34.3%	47.5%	50.1%
Our publishing/content creation team consists of 6 or more staff	28.8%	19.2%	9.0%

Source: Naylor, LLC, and Association Adviser Enews, 2011. Totals exceed 100% due to response option

- Executive directors tend to express most concern about their organizations' lack of rules about how frequently they touch members with communications pieces. They also tend to be the respondents most likely to overstate the number of staff members on their publishing/content creation teams.
- Publishing/communications and membership leaders are equally concerned about their organizations' lack of enforcement of the rules about how frequently they touch members with their communications pieces.
- Publishing/communications leaders tend to be the respondents most likely in favor of high frequency publication of their member magazine. They are also the respondents most likely to say their association has an employee responsible for managing their organizations' online presence.
- Membership leaders are the respondents most likely to say the ideal frequency of their member magazine has changed since 2008 and are most likely to undercount the number of full-time staff assigned to their publishing/content creation teams.

"Developing better two-way communication channels is a top priority."

— Publishing director for a midsize insurance association

Which department or personnel is primarily responsible for your online presence?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Marketing	19.7%	35.1%	36.8%
Administration	31.6%	9.3%	7.9%
Editorial	5.6%	13.4%	9.2%
Member Service	12.3%	6.2%	7.9%
Web/IT	13.8%	13.3%	13.2%
Other	17.1%	22.7%	25.0%

Source: Naylor, LLC, and Association Adviser eNews, 2011

- Executive directors are the respondents most likely to say their organization assigns a non-content specialist to manage their online presence.
- Membership directors are most likely to say a marketing or "other" staffer is responsible for their organizations' online presence.
- Publishing/communications directors are most likely to say an editorial staffer is responsible for their organizations' online presence.

What percentage of your overall communication vehicles do you feel members are reading on a regular basis?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Less than 25%	15.6%	10.3%	17.9%
25% to 50%	45.7%	50.5%	53.8%
51% to 75%	27.9%	27.8%	24.4%
76% or more	10.8%	11.3%	3.8%
Read at least 50%	38.7%	39.1%	28.2%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Membership directors are the respondents most likely to cite communications waste and/or lack of member engagement with their organization's communication vehicles.

Assessment of overall member communication channels by job title

	Executive Director/CEO		Publishing/Communication Staff		Membership	
	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*
Online Media	42.4%	3.96	60.8%	3.88	54.0%	3.97
Social Media	53.7%	3.30	82.2%	3.64	60.9%	3.43
Print Media	15.0%	3.92	16.7%	4.13	14.0%	3.83
Events	38.5%	4.30	30.1%	4.31	29.8%	4.32
Mobile Media	28.6%	3.02	43.6%	3.10	40.1%	2.93

Source: Naylor, LLC, and Association Adviser Enews, 2011

*5 (Excellent) to 1 (Poor). Totals exceed 100% due to response option

- Executive directors are the respondents most likely to say their organization is planning to invest more resources in events over the next 12 months.
- Regardless of job title, respondents unanimously said members would rate their organizations' events more highly than any other communication vehicle they offer.
- Publishing/communications leaders are more likely than other survey respondents to say their organization is planning to invest more resources over the next 12 months in online, social, print and mobile media.
- Membership leaders and executive directors are most likely to give their organizations' online media highest marks.
- Publishing/communications leaders are more likely than other survey respondents to give their organizations' social media, mobile media and print media highest marks.

Ranking of resource allocation and perceived member value of overall member communication channels by job title

	Executive Director/ CEO		Publishing/ Communication Staff		Membership	
	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank
Online Media	2	2	2	3	2	2
Social Media	1	4	1	4	1	4
Print Media	5	3	5	2	5	3
Events	3	1	4	1	4	1
Mobile Media	2	5	3	5	3	5

Source: Naylor, LLC, and Association Adviser eNews, 2011. □ Significant Disconnect □ Moderate Disconnect

- Regardless of job title, survey respondents unanimously indicated a significant disconnect between their organizations' planned investment in social media and members' perceived value of social media.
- Executive directors are the survey respondents most likely to indicate a disconnect between their organizations' planned investment in mobile media and members' perceived value of mobile media.
- Publishing/communications leaders are the survey respondents most likely to indicate a disconnect between their organizations' planned investment in print media and members' perceived value of print media.
- Publishing/communications leaders and membership leaders are the survey respondents most likely to indicate a disconnect between their organizations' planned investment in association events and members' perceived value of association events.

"Simply finding enough volunteers to help with everything we have going on is an ongoing challenge for us."

— Past president of a small media production association

Assessment of specific communication vehicles by job title

	Executive Director/ CEO		Publishing/ Communication Staff		Membership	
	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*
Webinars	52.5%	3.77	62.1%	3.84	61.3%	3.93
Facebook	44.4%	2.90	63.8%	3.05	50.6%	2.93
Virtual Conferences	32.6%	3.83	41.1%	3.80	44.6%	3.93
Twitter	30.9%	2.56	53.4%	2.87	41.9%	2.87
Video	30.9%	3.04	57.1%	3.23	54.8%	3.15
LinkedIn	30.0%	2.80	41.4%	3.03	31.5%	2.92
List Servs	21.2%	3.61	19.0%	3.46	16.7%	3.38
Online Career Center	20.7%	3.32	16.4%	3.47	24.3%	3.36
Blogs	18.9%	2.84	44.1%	2.93	30.1%	3.13

(table cont'd next page)

Assessment of specific communication vehicles by job title (cont'd)

	Executive Director/ CEO		Publishing/ Communication Staff		Membership	
	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*
Member-Vendor Appointment Setting	17.0%	3.64	21.8%	3.50	23.6%	3.71
Member Directory	9.5%	4.01	1.8%	3.81	4.2%	3.51
Show Guide	6.5%	3.66	2.7%	3.69	13.4%	3.73
Member Magazine	6.2%	4.16	14.0%	4.16	5.6%	3.94

Source: Naylor, LLC, and Association Adviser enews, 2011

*5 (Excellent) to 1 (Poor). Totals exceed 100% due to response option

Ranking of resource allocation and perceived member value of specific member communication channels by job title

	Executive Director/ CEO		Publishing/ Communication Staff		Membership	
	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank
Member Magazine	13	1	11	1	12	1
Webinars	1	4	2	2	1	2
Virtual Conferences	3	3	7	4	4	3
Show Guide	12	5	12	5	11	4
Member-Vendor Appointment Setting	10	6	8	6	9	5
Member Directory	11	2	13	3	13	6
List Servs	7	7	9	8	10	7
Online Career Center	8	8	10	7	8	8
Video	5	9	3	9	2	9
Blogs	9	11	5	12	7	10
Facebook	2	10	1	10	3	11
LinkedIn	6	12	6	11	6	12
Twitter	4	13	4	13	5	13

Source: Naylor, LLC, and Association Adviser enews, 2011. ☐ Under-investing ☐ Over-investing

- Regardless of job title, survey respondents unanimously indicated a significant disconnect between their organizations' planned investment in their member magazine, show guide and directory and members' perceived value of those vehicles.

- Regardless of job title, respondents unanimously overstated their members' perceived value of social media (Facebook, LinkedIn, Twitter, etc.) relative to the amount of resources they planned to invest in those channels.
- Publishing/communications directors and membership directors appeared to overstate their members' perceived value of video and podcasting relative to the amount of resources they planned to invest in those channels.
- Publishing/communications directors appeared to overstate their members' perceived value of blogs relative to the amount of resources they planned to invest in that channel.

"Just getting the information out is a big enough challenge for us. We have a marketing and communications director on staff, but he does not touch our members on a regular basis, only when there's a legal issue or event to be promoted."

— Operations director of a small association serving the broadcasting industry

If your organization's publishing/content creation team unexpectedly received an extra \$50,000 in its budget, how would you recommend they spend it?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Hire more staff	32.7%	38.8%	31.2%
Improve quality of existing products	46.1%	38.7%	44.2%
Launch new products	32.3%	30.6%	26.0%
Upgrade existing publishing tools, technologies or processes	54.3%	53.1%	48.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- The desire to "upgrade existing publishing tools, technologies and processes" appears to be survey respondents' highest budget priority regardless of job title.
- Publishing/communications directors are the respondents most likely to say they'd use an unexpected budget windfall to hire more staff.
- Executive directors are the respondents most likely to say they'd use an unexpected budget windfall to improve the quality of their organizations' existing communications products, launch new products and upgrade their existing publishing tools, technologies and processes.

What are the financial goals of your organization's primary member communication vehicles?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Generate non-dues revenue (i.e., profit center)	38.6%	38.5%	40.8%
Break even	40.5%	41.7%	46.1%
Operate as a cost center	20.8%	19.8%	13.2%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Breaking even on membership communication appears to be the most highly cited financial goal among survey respondents regardless of job title.

- Membership directors are the respondents most likely to say their organizations communication vehicles are intended to generate a profit.
- Executive directors are the respondents most likely to say their communication vehicles operate as cost centers.

Are indirect costs, such as association staff time and overhead, factored into your response to the previous question?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Yes	62.2%	58.3%	53.9%
No	37.8%	41.7%	46.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The majority of respondents, regardless of job title, say their organizations DO take indirect costs into account when planning the financial goals of their association communication vehicles.
- Executive directors are more likely than other respondents to say indirect costs are an important consideration when planning the financial goals of their association communication vehicles.

Which tools and techniques are used to measure the effectiveness of your membership communication vehicles on a consistent basis?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Feedback from board/executive committee (at least 4x/yr)	70.3%	73.6%	73.7%
Readers surveys online	56.0%	57.7%	61.5%
Online polls (at least 4x/yr)	19.1%	23.7%	30.7%
Telephone surveys	12.5%	14.6%	16.2%
Advertisers surveys (at least 1x/yr)	28.7%	30.2%	35.1%
Focus groups (at least 1x/yr)	23.6%	28.9%	33.8%
Road shows/town halls (at least 1x/yr)	19.8%	21.9%	25.3%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- Comments from board members and executive committee members are the most frequently cited sources of member communication feedback across the board.
- Online readers surveys are the second most frequently cited source of member communication feedback across the board.
- Membership directors consistently cited the use of various member feedback tools more frequently than other survey respondents.

Do you ask your advertisers/sponsors regularly if they feel they are getting their money's worth?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Yes	59.8%	56.4%	55.3%
No	40.2%	43.6%	44.7%

"Engaging members in new media is a challenge as we still have lots of members in the fax generation."

— Publishing director of a small Southeastern association

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of job title, the majority of respondents said they DO check in regularly with advertisers and sponsors to make sure they've getting sufficient ROI with their associations' communications vehicles.
- Executive directors are somewhat more likely than other respondents to cite this practice.

Do each of your member communication vehicles have a distinct purpose that staff members can articulate? (i.e., each communication vehicle has a distinct publishing frequency, audience and content/messaging)

	Executive Director/CEO	Publishing/Communication Staff	Membership
Yes	73.0%	63.5%	84.9%
No	27.0%	36.5%	15.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of job title, the majority of respondents said their staff members CAN articulate the distinct publishing frequency, audience and messaging of each of their organizations' communication vehicles.
- Membership directors are more likely than other respondents to cite this practice.

To what extent do you believe your organization's member communication vehicles are integrated? (i.e., content is cross-pollinated, but not redundant, and your publishing teams are well aware of each other's activities—they're not working in silos)

	Executive Director/CEO	Publishing/Communication Staff	Membership
Fully or somewhat integrated	65.6%	78.5%	75.0%
Plan to be integrated within 12 months	11.2%	9.2%	6.9%
Not integrated	23.2%	12.2%	18.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of job title, the majority of respondents said their organizations' member communication vehicles are integrated.
- Publishing/communication leaders are slightly more likely than other respondents to cite this practice.
- Executive directors are more likely than other respondents to disagree with this assessment.

Outside of your communications team, to what degree are your board members or executive team involved in the creation, review and/or approval of your member communications material?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Highly involved	17.1%	14.4%	9.2%
Somewhat involved	41.7%	47.4%	51.3%
Not involved	41.2%	38.2%	39.5%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of job title, the majority of respondents said their senior management team is "somewhat involved" in reviewing or approving their communications material before it is sent to members.
- Publishing/communication leaders are most likely to agree with this assessment.
- Executive directors are more likely than other respondents to disagree with this assessment.

Which three communication vehicles require the most senior management review/approval?

Executive Director/CEO	Publishing/Communication Staff	Membership
Member newsletter 66.3%	Member magazine 55.6%	Member newsletter 64.9%
Website 58.1%	Member newsletter 52.6%	Member magazine 61.4%
Member magazine 46.3%	Conference sessions 38.9%	Website 45.6%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to response option

- Executive directors are most likely to say their organizations' member e-newsletter, website and magazine need to be more thoroughly vetted than other member communications vehicles.
- Publishing/communication staff are more likely than other respondents to include conference sessions in their list of highly-vetted member communications vehicles.

- Membership leaders are more likely than other respondents to say their organizations' member magazine needs to be vetted more thoroughly than other member communications vehicles.

"It's a constant balancing act between those who want all electronic communication and those who don't."

— Executive director of a small building and construction industry association

Has the "flagship" of your communications strategy changed over the past three years?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Yes	66.0%	63.3%	72.6%
No	34.0%	36.7%	27.4%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of job title, the majority of respondents agree that their organizations' communication flagship vehicle has changed since 2008.
- Membership leaders are most likely to agree with this assessment.
- Publishing/communications staff are least likely to agree with this assessment.

Which of the following communication vehicles serves as the "flagship" of your organization's member communications?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Member Magazine (Print)	28.5%	45.9%	30.7%
Member e-Newsletter	25.7%	15.3%	32.0%
Member Website	19.7%	19.4%	22.7%
Member newsletter (Print)	10.4%	9.2%	4.0%
Member Directory (Print)	6.0%	4.1%	8.0%
Member Magazine (Digital)	4.8%	6.1%	1.3%
Social Media/Other	4.8%	0.0%	1.3%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Membership directors are most likely to cite their organization's e-newsletter as the current communication flagship vehicle.
- Executive directors and publishing/communication staff are most likely to cite the member magazine as the current communication flagship vehicle.
- The member website is now the third most frequently cited communication flagship, regardless of job title.

Do you offer your advertisers and sponsors the ability to place synchronized marketing messages across your various communications channels?

	Executive Director/CEO	Publishing/Communication Staff	Membership
Yes	38.2%	54.7%	54.1%
No	61.8%	45.3%	45.9%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The majority of membership directors and publishing/communications staff agree that their organizations' advertisers and sponsors have the ability to place synchronized marketing messages across their various communications channels.
- By contrast, nearly two-thirds of executive directors disagree with this assessment.

6.3 Association Communication Comparisons by Association Operating Budget

DEFINITIONS:

- **Small Membership Organization** (operating budget less than \$1M) (N=295)
- **Midsize Membership Organization** (operating budget between \$1M and \$5M) (N=227)
- **Large Membership Organization** (operating budget more than \$5M) (N=109)

How many members does your organization have?

Members	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Less than 1,000	68.8%	31.5%	26.8%
1,001 to 5,000	28.1%	46.6%	19.5%
5,001 to 10,000	1.4%	12.4%	6.5%
Greater than 10,000	1.7%	9.3%	47.2%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The majority of associations with small operating budgets (less than \$1M) have less than 1,000 active members.
- Nearly half (46.6%) of midsize associations (operating budgets between \$1M and \$5M) have 1,000 to 5,000 members and nearly one-third have less than 1,000 members.

- Associations with large operating budgets (more than \$5M) can serve a wide variety of membership sizes, but nearly half (47.2%), have more than 10,000 members.

*"We don't want to overwhelm our members. Our emphasis is on **colleague networking** more than on **social networking**."*

— Executive director of small Canadian association for professional educators

How many total full-time staff do you have?

Staff Size	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
1-5	87.6%	16.1%	2.8%
6-10	10.0%	34.8%	2.8%
11-24	1.4%	39.3%	14.7%
25-50	0.3%	6.7%	35.8%
51+	0.7%	3.1%	44.0%
MEAN	4.2 staff	14.4 staff	40.5 staff

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The vast majority (87.6%) of associations with small operating budgets have less than five full-time staff. On average they employ 4.2 full-time staff.
- More than one third (34.8%) of midsize associations have between six and 10 full-time staff and another 39.3 percent have between 11 and 24 full-time staff. On average they employ 14.4 full-time staff.
- Nearly 80 percent of associations with large operating budgets employ more than 25 full-time staff and nearly half (44%) employ 51 or more staff. On average they employ 40.5 staff.

How many full-time staff do you have on your publishing/content creation teams?

Publishing/Content Staff Size	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
0-1	77.6%	38.9%	14.8%
2-5	22.0%	55.8%	51.1%
6-10	0.4%	4.7%	22.7%
11+	0.0%	0.5%	11.4%
MEAN	1.2 staff	2.6 staff	5.4 staff

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The vast majority (77.6%) of associations with small operating budgets have less than one full-time staff member dedicated to their content creation teams. On average they employ 1.2 full-time staff on their content creation teams.
- More than one half (55.8%) of midsize associations have between two and five full-time staff employed on their content creation teams and another 38.9 percent have only one full-time staff member assigned to their content creation teams. On average they employ 2.6 full-time staff on their content creation teams.
- Even associations with large operating budgets employ relatively few full-time staff on their content creation teams. Nearly two-thirds (65.9%) have five or fewer full-time staff on their content creation teams and only 11.4 percent have more than 10. On average they employ 5.4 full-time staff on the content creation teams.

Publishing/Content Creation Staff as a Percentage of Total Staff

Staffing Devoted to Publishing/Content Activities	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Mean Total Staff	4.2	14.4	40.5
Mean Publishing/Content Staff	1.2	2.6	5.4
<i>Publishing/Content Staff as % of Total Staff</i>	29.0%	18.0%	13.0%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- As association budgets get larger, they devote relatively fewer full-time staff resources to publishing and content creation activities.
- Associations with small operating budgets (under \$1M) assign nearly 30 percent of their full-time staff to their publishing and content creation activities—nearly 1.5 times the ratio of associations with midsize operating budgets and more than twice the ratio indicated by large associations.

Does your organization have an employee or department dedicated to managing your online presence?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Yes	56.9%	73.2%	77.5%
No	43.1%	26.8%	22.5%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Regardless of operating budget, the majority of associations say they have an employee or department dedicated to managing their online presence.
- The smaller an association's operating budget, the more likely it is to say it does NOT have an employee or department dedicated to managing its online presence.

If yes, who is that person or department?

	Small Operating Budget Budget < \$1M	Midsize Operating Budget Budget <\$1M - \$5M	Large Operating Budget Budget \$5M+
Marketing	16.2%	33.7%	37.9%
Administration	34.0%	14.7%	3.4%
Editorial	4.5%	9.2%	16.1%
Member Service	15.8%	7.6%	6.9%
Webmaster/IT	7.7%	15.8%	19.5%
Other	21.9%	19.0%	16.1%
<i>Editorial/Marketing specialist</i>	<i>20.7%</i>	<i>42.9%</i>	<i>54.0%</i>

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The larger an association's operating budget, the more likely it is to assign a marketing, editorial or webmaster/IT person to manage their online presence.
- The smaller an association's operating budget, the more likely it is to assign an administrative or member service person to manage their online presence.
- Associations with midsize operating budgets are most likely to assign a marketing professional to handle their online presence.

How would you rate the effectiveness of your member communications overall?

	Small Operating Budget Budget < \$1M	Midsize Operating Budget Budget <\$1M - \$5M	Large Operating Budget Budget \$5M+
Excellent ("Best in Class")	8.6%	5.7%	17.3%
Above Average	42.9%	58.3%	49.0%
Average	45.0%	33.6%	30.6%
Below Average or Poor	3.6%	2.4%	3.1%
<i>Excellent or Above Average</i>	<i>51.5%</i>	<i>64.0%</i>	<i>66.3%</i>

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The larger an association's operating budget, the more likely it is to rate the effectiveness of its member communications efforts as "above average" or "best in class."

- The smaller an association's operating budget, the more likely it is to rate the effectiveness of its member communications efforts as only "average." As shown below, they are also the group most likely to feel their communication effectiveness has remain the same in recent years.

To what extent would you say your organization's communications effectiveness has improved over the past three years?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Improved significantly	47.1%	47.4%	34.3%
Improved somewhat	41.1%	45.0%	52.5%
Stayed the same	10.0%	6.6%	9.1%
Worse	1.8%	0.9%	4.0%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Small and midsize organizations are more likely it is to say they have "significantly" improved their communications effectiveness.
- The larger the organization's operating budget, the more likely it is to say it has "somewhat" improved its communications effectiveness

Which of the following describes key communications challenges that your organization is having?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Information overload/ combatting clutter	45.0%	60.0%	66.0%
Maintaining position as industry's No.1 source of information	28.4%	28.1%	31.0%
Communicating membership benefits effectively	30.6%	31.9%	36.0%
Customizing communication for sub-groups/ SIGs	19.1%	25.7%	28.0%
Keeping members abreast of legislative/technical updates	13.3%	12.9%	13.0%
Keeping members abreast of our events and continuing education	16.9%	11.9%	10.0%
Monitoring our online brand/ reputation	11.2%	10.1%	18.0%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to multiple response option

- Across the board, the top three communications challenges for associations are:
 - Information overload
 - Being the No.1 source of industry information
 - Communicating member benefits effectively
- Generally speaking, the larger an association's operating budget, the more likely it is to be concerned about information overload, being the No.1 source of industry information, communicating member benefits effectively, customizing communications for various sub-groups of its membership and monitoring its online brand.
- The smaller the organization's operating budget, the more likely it is to be challenged with keeping members abreast of its conferences, events, webinars, and/or continuing education.

On a scale of 5 (very important) to 1 (not important), which type of information is most important to your members?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Member news	3.77	3.72	3.37
Industry news & trends	4.17	4.34	4.28
Industry movers & shakers	3.08	3.12	2.93
Key industry events	3.71	3.59	3.48
Lobbying/advocacy efforts	4.10	3.99	4.09
Career/Professional Development	3.74	3.78	3.81
Information about our products & services	3.56	3.56	3.70

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Associations of all-size operating budgets rate "industry news and trends" as their members' most sought-after major category of information.
- Regardless of operating budget, associations rate "lobbying/advocacy efforts" as their members' second-most sought-after type of information.
- Associations with small operating budgets are most likely to cite "member news" among their top three categories of important member information.
- Associations with midsize and large operating budgets are most likely to cite "career/professional development among their top three categories of important member information.

In terms of gaining meaningful feedback from members, in which of the following tools will you be investing MORE resources over the next 12 months?

	Small Operating Budget Budget < \$1M	Midsize Operating Budget Budget <\$1M - \$5M	Large Operating Budget Budget \$5M+
Reader surveys	28.0% agree	26.7% agree	23.2% agree
Member satisfaction surveys	49.6%	49.3%	40.4%
Website	69.2%	69.0%	57.1%
Webinars	46.6%	60.5%	67.7%
Discussion forums	33.3%	39.4%	45.9%
Blogs	26.9%	36.7%	46.5%
Social media (Facebook, Twitter, LinkedIn)	64.1%	69.3%	70.4%
Customer service	37.8%	37.4%	25.8%

Source: Naylor, LLC, and Association Adviser enews, 2011
Totals exceed 100% due to multiple response option

- Associations with smaller operating budgets are more likely than other associations to say they're investing the most resources in their websites to gain meaningful feedback from members. Small associations cite social media and member satisfaction surveys as their second and third highest priorities respectively for investing resources in member feedback tools.
- Midsize and larger associations, based on operating budget, are investing the most new resources in social media for gaining meaningful member feedback.
- Midsize and larger associations cite their websites and webinars as their second and third highest priorities respectively for investing resources in member feedback tools.

Compared to three years ago, to what extent have you changed the frequency with which you communicate with your members?

	Small Operating Budget Budget < \$1M	Midsize Operating Budget Budget <\$1M - \$5M	Large Operating Budget Budget \$5M+
Much more frequently	46.6%	54.9%	57.1%
Somewhat more frequently	43.0%	37.3%	34.7%
Same	8.7%	6.9%	6.1%
Less frequently	1.8%	1.0%	2.0%

Source: Naylor, LLC, and Association Adviser enews, 2011

- Associations of all funding levels report that they are communicating with members more frequently than they did three years ago.
- That said, the larger the operating budget, the more likely the organization is to report communicating “much more frequently” with members.
- The smaller the operating budget, the more likely the organization is to report communicating “somewhat more” frequently with members.

Approximately how many times per month are you connecting with members (via print and online channels)?

	Small Operating Budget Budget < \$1M	Midsize Operating Budget Budget <\$1M - \$5M	Large Operating Budget Budget \$5M+
1 or less	11.5% agree	2.9% agree	3.1% agree
2-3	33.8%	22.9%	12.2%
4-10	39.2%	49.8%	48.0%
11-19	5.8%	13.7%	19.4%
20+	9.7%	10.7%	17.3%
<i>More than 10x per month</i>	15.5%	24.4%	36.7%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- While **four to 10 times** per month is the most frequent communications cadence for associations of all sizes, the larger an association’s operating budget, the more likely it is to be communicating with members more than 10 times per month via print and online vehicles.

Approximately how many times per month are you connecting with members (via social media channels)?

	Small Operating Budget Budget < \$1M	Midsize Operating Budget Budget <\$1M - \$5M	Large Operating Budget Budget \$5M+
Daily	4.7%	15.2%	21.4%
Several times per week	9.7%	17.2%	19.4%
Weekly	18.7%	26.5%	30.6%
Several times per month	8.3%	6.4%	4.1%
Monthly	12.9%	12.3%	7.1%
Not using social media	45.7%	22.5%	17.3%
<i>Multiple times per week</i>	14.4%	32.4%	40.8%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- While a weekly frequency is the most frequent cadence for associations of all sizes to touch members via social media, the larger the association's operating budget, the more likely it is to be touching members via social media multiple times per week, including daily.

To what extent is your organization monitoring the frequency and volume of communication you have with members?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Recency/frequency rules strictly enforced	10.5%	16.7%	24.5%
We have recency/frequency rules but NOT strictly enforced	18.1%	31.9%	30.6%
Planning to monitor	11.9%	5.9%	14.3%
Cut back only when members or board complain	4.3%	4.9%	5.1%
No policy in place	55.2%	40.7%	25.5%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The larger the operating an association's budget, the more likely it is to be sensitive to the frequency and volume of communication it sends to members.
- The smaller the association's budget, the more likely it is to report having no rules or policies in place to control the amount of communication it sends to members.

To what extent does your organization enable members to opt-in, control or customize the types of communication they receive from you?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
We allow members to opt-in and opt-out of our communications	52.2%	56.9%	71.4%
We customize our communications for sub-groups and SIGs	21.4%	29.9%	43.9%
We see the value of customizing communications, but not there yet	34.1%	32.8%	34.7%
We don't think customization of communications is necessary	14.9%	6.4%	3.1%

Source: Naylor, LLC, and Association Adviser Enews, 2011
Totals exceed 100% due to multiple response option

- Regardless of operating budget, the majority of associations say they allow members to opt-in and opt-out of communications they receive from them.
- The larger an association's operating budget, the more likely it is to be customizing communication for members—and advocate the value of customized communication.

Do you believe the ideal frequency of your primary member magazine has changed over the past three years?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
Yes	32.2%	37.8%	38.5%
No	67.8%	62.2%	61.5%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- Roughly one in three associations believe the ideal frequency of their primary member magazine has changed over the past three years.

What is the ideal publishing frequency of your main member magazine?

	Small Operating Budget < \$1M	Midsize Operating Budget <\$1M - \$5M	Large Operating Budget \$5M+
10-12x per year	19.7%	21.5%	53.9%
6-9x per year	14.5%	30.9%	20.2%
3-5x per year	45.4%	37.7%	16.9%
1-2x per year	20.5%	9.9%	9.0%

Source: Naylor, LLC, and Association Adviser Enews, 2011

- The larger an association's operating budget, the more likely it is to believe a higher publishing frequency is better for its main member magazine.

Gap Analysis of Primary Member Communication Channels:

Comparison of expected resource investment with member value rank

	Small Operating Budget Budget < \$1M		Midsize Operating Budget Budget <\$1M - \$5M		Large Operating Budget Budget \$5M+	
	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*
Online Media	48.4%	4.01	50.1%	3.90	58.3%	3.95
Social Media	55.3%	3.35	62.4%	3.30	71.9%	3.60
Print Media	9.7%	3.97	14.4%	3.87	18.2%	4.16
Events	36.6%	4.44	36.5%	4.24	25.9%	4.23
Mobile Media	24.2%	3.20	38.3%	2.88	52.4%	3.20

Source: Naylor, LLC, and Association Adviser Enews, 2011

*5 (Excellent) to 1 (Poor). Totals exceed 100% due to response option

- Regardless of operating budget, associations of all sizes believe members rate their live events and conferences higher than any of their other member communication vehicles.
- However, more than one-third (36%) of small and midsize associations (based on reported operating budget) expect to be investing more resources into their live conferences and events over the next 12 months. Further, just one in four (26%) large associations expect to be investing more resources in conferences and events.
- Regardless of operating budget, associations of all sizes are more likely to be investing “more resources” into social media and online media than into any other communications channels.

Gap Analysis of Primary Member Communication Channels:

Comparison of expected resource investment with member value rank

	Small Operating Budget Budget < \$1M		Midsize Operating Budget Budget <\$1M - \$5M		Large Operating Budget Budget \$5M+	
	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank
Online Media	2	2	2	2	2	3
Social Media	1	4	1	4	1	4
Print Media	5	3	5	3	5	1
Events	3	1	4	1	4	2
Mobile Media	4	5	3	5	3	5

Source: Naylor, LLC, and Association Adviser Enews, 2011. 1 = Highest to 5 = Lowest. □ Significant Gap □ Moderate Gap

- Regardless of operating budget, associations of all sizes seem to have a significant disconnect between their planned investment in social media and their perceived member value of social media. More associations are planning to invest in social media than into any of the five major media channels, but across the board, social media is believed less valuable to members than any of the other major media channels except for mobile media.
- Midsize associations (\$1M to \$5M operating budget) have a significant disconnect between their planned investment in events (second lowest) and perceived member value of live events (highest). These organizations seem to have moderate disconnects between their planned (under) investment in print media and planned (over) investment in mobile media.
- Large associations (more than \$5M operating budget) also have a significant disconnect between their planned investment in print media (lowest) and perceived member value of print media (highest). These organizations seem to have moderate disconnects between their planned (under) investment in live events and planned (over) investment in mobile media.
- Smaller associations (less than \$1M operating budget) seem to have a moderate disconnect between their modest planned investments in print media and events, relative to members' strong perceived value of those channels.

Gap Analysis of Specific Member Communication Channels:

Comparison of expected resource investment with member value rank

	Small Operating Budget Budget < \$1M		Midsize Operating Budget Budget <\$1M - \$5M		Large Operating Budget Budget \$5M+	
	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*	More Resources	Member Value 1-5*
Member Magazine (print or digital)	8.1%	4.05	6.7%	4.11	14.8%	4.34
Member Directory	8.9%	4.01	5.5%	3.84	5.1%	3.69
Virtual Conferences	33.0%	3.82	38.9%	3.78	48.8%	3.92
Member-Vendor Appointment Setting	18.2%	3.78	19.4%	3.51	19.2%	3.67
Show Guide	6.4%	3.76	7.6%	3.75	9.0%	3.85
Webinars	46.1%	3.56	63.9%	3.89	72.9%	3.92
List Servs	14.4%	3.53	18.1%	3.46	18.5%	3.22
Online Career Center	19.0%	3.38	17.1%	3.19	25.9%	3.61
Video	30.5%	3.01	46.4%	2.98	57.3%	3.39
Facebook	50.9%	2.99	48.4%	2.83	52.4%	3.08
Linked In	38.8%	2.89	31.8%	2.79	30.5%	2.98
Blogs	23.8%	2.81	27.7%	2.73	45.1%	3.32
Twitter	36.9%	2.69	37.8%	2.58	48.2%	2.87

Source: Naylor, LLC, and Association Adviser eNews, 2011

*5 (Excellent) to 1 (Poor). Totals exceed 100% due to response option

Gap Analysis of Specific Member Communication Channels:

Comparison of expected resource investment with member value rank

	Small Operating Budget Budget < \$1M		Midsize Operating Budget Budget <\$1M - \$5M		Large Operating Budget Budget \$5M+	
	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank	More Resources Rank	Member Value Rank
Member Magazine (print or digital)	12	1	12	1	11	1
Webinars	2	6	1	2	1	2
Virtual Conferences	5	3	4	4	4	3
Show Guide	13	5	11	5	12	4
Member Directory	11	2	13	3	13	5
Member-Vendor Appointment Setting	9	4	8	6	9	6
Online Career Center	8	8	10	8	8	7
Video	6	9	3	9	2	8
Blogs	7	12	7	12	6	9
List Servs	10	7	9	7	10	10
Facebook	1	10	2	10	3	11
Linked In	3	11	6	11	7	12
Twitter	4	12	5	13	5	13

Source: Naylor, LLC, and Association Adviser Enews, 2011. □ Gap (5- or more) Under-investing □ Gap (5+ or more) Over-investing

- With respect to specific member communication channels within our five primary categories, all associations, regardless of operating budget, seem to be significantly underinvesting in their member magazines, show guides and member directories relative to how highly they believe members value those vehicles.
- Smaller associations also seem to be significantly underinvesting in member-to-vendor appointment setting events relative to how highly they believe members value those vehicles.
- All associations, regardless of operating budget, seem to be significantly overinvesting in blogs, Facebook, LinkedIn and Twitter relative to perceived member value of those channels.
- Midsize associations also seem to be significantly overinvesting in video and podcasting relative to perceived member value of those channels.

7. ABOUT THE RESEARCHERS

(listed alphabetically)

Hank Berkowitz, MBA, MA is moderator in chief of the *Association Adviser Enews*. He has 20 years of experience as an online editor, publisher and content strategist. Prior to joining Naylor, Hank co-founded and ran day-to-day operations of the CPA Insider™ e-newsletter group at the 365,000-member American Institute of Certified Public Accountants (AICPA). Earlier he founded the SECrets e-newsletter group at EDGAR Online, Inc. (1.2 million weekly readers), and he has held editorial and management positions with Pensions & Investments Magazine, CFO.com/Economist Group and CCH, a Wolters Kluwer Company.

M. Sean Limon, Ph.D., is oral communication coordinator in the Center for Management Communication at the University of Florida's Warrington College of Business Administration. Dr. Limon has taught and consulted in the communication field for more than 10 years. He has taught courses and workshops for students and professionals in the areas of presentation skills, teamwork, leadership, organizational culture and conflict.

Dana Plotke, manager, marketing & research, association services for Naylor, LLC, oversees corporate marketing and association marketing programs. In this role, Dana and her team of marketing specialists and graphic designers promote Naylor services to the association community and provide marketing services to ensure enhanced ROI for Naylor's 500 association partners. With more than 15 years of experience in B-to-B marketing, events and communications, Dana has focused on association media and events since 2002.

Charles Popper, vice president of association relations for Naylor, LLC, has more than 15 years of association, B-to-B and consumer publishing experience. With the help of his team of 11 publishers, Charles is responsible for managing the business of Naylor's 500 association clients, ensuring that their communication and non-dues revenue goals are met, while continuing to grow business through online, print and event products and services. Charles rose through the Naylor ranks from advertising sales to trainer for Naylor's advertising sales and publishing teams. In addition to his work with Naylor, Charles also has held management and publishing positions at a variety of consumer publications.

We hope this summary will further your understanding of association communication benchmarks and best practices during these rapidly changing times.

THANKS

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