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Executive Summary and Discussion Guide Looking Forward[®] Solutions 2022

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Letter from the President

Welcome to the 2nd installment of Looking Forward® Solutions. This is the second in a 3-part series of association sector studies produced by Association Laboratory each year. Our goal? Help you understand the changing environment facing strategy.

As we work with clients and produce educational events and content, the association leaders we work with constantly ask, “What are other associations doing?”

Their goal is to avoid re-learning what others have already learned, seeking to build onto the association sector’s knowledge, not duplicate it.

No study could come close to assessing the many strategies that associations are using to set themselves apart from competitors and create vibrant diverse communities and achieve their Mission. Looking Forward® Solutions, though, attempts to identify the most critical strategies. The efforts, identified through our research and client discussions, which resonate.

The association sector continues to show that our leaders are committed to data-driven decision-making. We demonstrate daily that we are committed to innovation and adaptation in the face of substantial challenges.

At Association Laboratory, we will continue our commitment to giving you the information, insights, and opportunities you need to thoughtfully consider your future and develop strategies to make your professional and organizational success a reality.

I hope you will use the information from Looking Forward® (Solutions) contained in this executive summary and in the customizable dataset located on the [Looking Forward Dashboard®](#) to inform the decisions that are critical to the success of your association.

If I or my team can ever be of assistance, never hesitate to contact us. We look forward to working with you.



Dean West, FASAE
President and Founder
Association Laboratory Inc.



The Association Laboratory Research Alliance



Association Laboratory is proud to be the founder and leader of the Association Laboratory Research Alliance®.

The Association Laboratory Research Alliance® is a collaboration of more than 20 state, national, specialty and global societies of association executives designed to investigate, lead the discussion of, and provide insight into the future of the association business model.

Since inception, the Association Laboratory Research Alliance® has investigated the forces shaping association members and the implications of these forces on association strategy. Through research reports, customizable dashboards and virtual and in-person seminars, the Alliance provides the most recent, relevant, and useful information for association leaders to learn about the future of associations.

The Association Laboratory Research Alliance® produces three sector studies under the Looking Forward® banner that are critical to association sector thought leadership.

- **Looking Forward® (Impact)** – This global environmental scan of the association strategy environment identifies the factors with the greatest impact on association members and the challenges these factors create for associations.
- **Looking Forward® (Solutions)** – This study assesses more than 135 different strategies that association leaders believe are important to success given the influences on their members and the challenges these factors create.
- **Looking Forward® (DEI)** – This study, the first of its kind in the association sector, investigates sector perceptions of DEI issues, the challenges associations perceive in effective DEI work and the strategies being pursued by associations to address these challenges.

To access the most relevant, recent and useful association sector research, visit the [Looking Forward Dashboard](#).



Thanks to our Strategic Partners

Association Laboratory would like to thank two companies that are essential to the continued collection and dissemination of quality association sector research.

Gravitate

Gravitate's Nucleus data analytics platform was built specifically for associations and is designed to meet the unique needs of the member industry.

It aggregates the vast amounts of powerful member data currently stored in different systems across member-based organizations (AMS, email marketing, events, learning management, online community and more) and makes insights into this data available to everyone: staff, leadership, components, the board – and even members.

The "Looking Forward 2022" data dashboard is Nucleus, specially configured to show this important environmental scan information and allow you to explore it.

Nucleus is thrilled to have been selected as the official data analytics solution of the Association Laboratory Research Alliance and hopes you enjoy this new way to benefit from the Looking Forward study.

You are invited to browse the [Analytics for Associations Success Kit](#) to learn more about Nucleus and to contact us to discuss use cases at your organization at analytics@gravitatesolutions.com

CE21

CE21 is a cloud-based technology and services company providing a full service, Learning Management System (LMS) that delivers distance education, online registration, and physical product sales solutions.



The company serves professional education verticals including: Legal, Accounting, Health Care, Insurance, Business, Education Content Providers, Professional & Trade Associations, and Non-Profit Organizations.

Association Laboratory uses CE21's LMS system to give us more capacity and capability to provide leading edge content to association leaders. You can see the system in action on [Association Laboratory's Knowledge Center](#).

CE21's award-winning LMS can help your organization deliver a best-in-class e-learning experience designed specifically for your most important customers – your learners.

Built for today but designed with the flexibility to take on tomorrow's changing needs, CE21 provides an elegant, mobile-optimized online learning environment that will transform your organization into a 24/7 on-demand value provider.

For more information visit CE21.com.

The Challenges Facing Primary Association Strategies

Association Laboratory has consistently asked association executives to identify their level of concern regarding key association strategies. The following chart highlights the changing level of concern since December 2020.

The data clearly shows that association executives were substantially more concerned about key association strategies during the heart of the pandemic when uncertainty was at its highest level.

The data also clearly shows that the overall level of concern for various association strategies has not changed significantly over time. Membership acquisition, retention and engagement has consistently been the most challenging area facing association leaders.

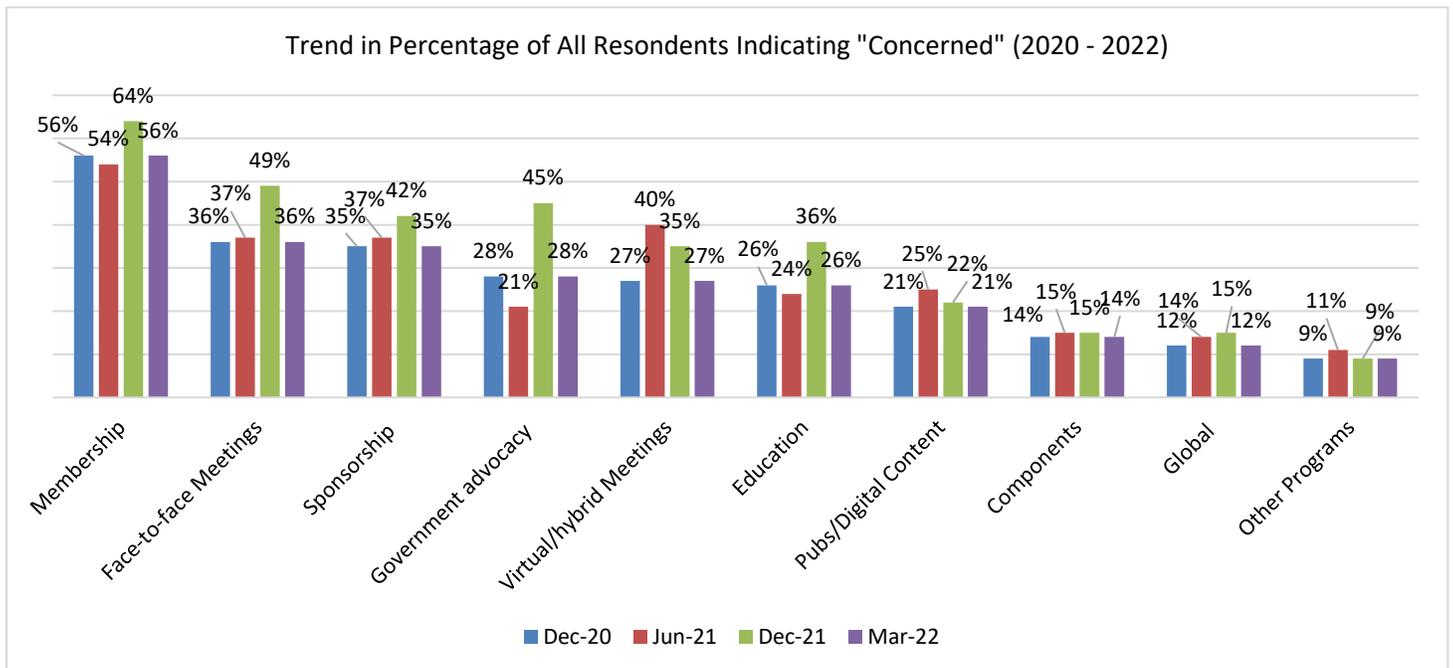


FIGURE 1 LOOKING FORWARD TREND ANALYSIS 2020 - 2021 - PERCENTAGE OF ALL RESPONDENTS INDICATING "CONCERNED."
Question text: How concerned are you about each of the following association strategies over the next three years?

In 2015, 43% of respondents to Looking Forward® Impact indicated they were concerned about membership. Today, that level of concern has increased by approximately 30%.

From prior to, throughout and now as we exit the COVID-19 pandemic, associations continue to struggle with how to adapt the membership model to the evolving needs of their market.

If your association struggled with membership prior to the pandemic, you will continue to struggle as you exit the pandemic.

In December 2020, the study Looking Forward® Impact 2021 asked respondents to identify the association strategy domains most likely to face challenges in the near future. The following is the level of concern for each strategy by all respondents.

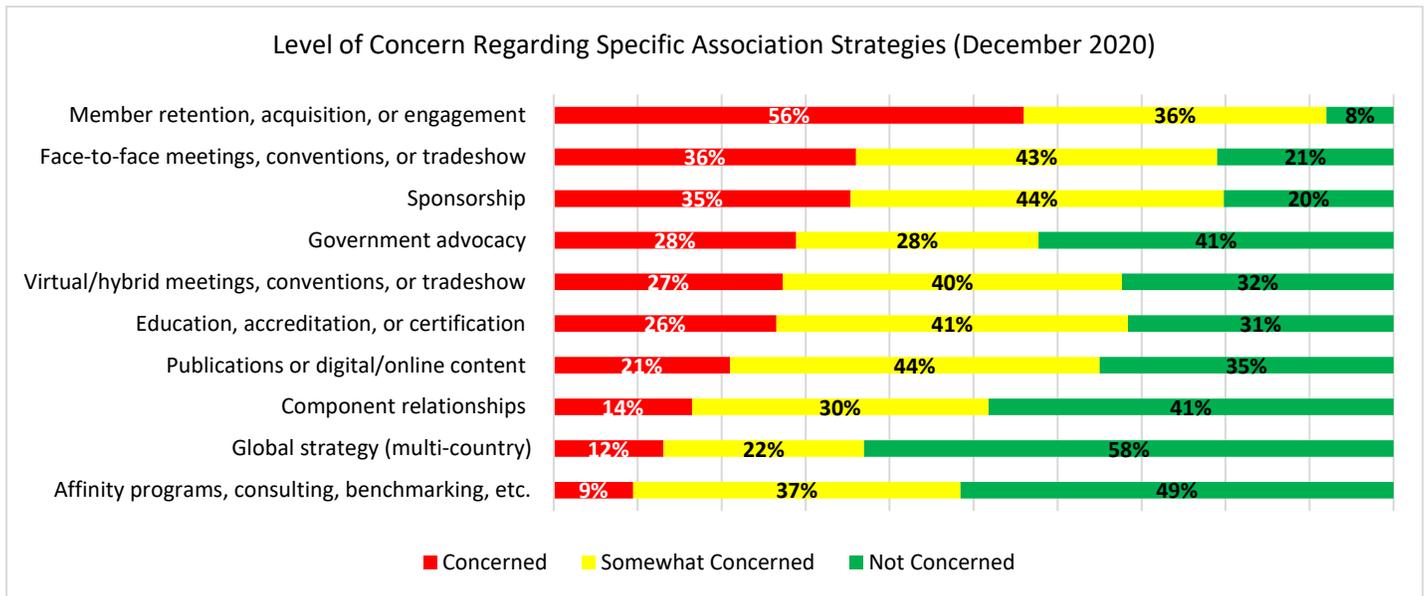


FIGURE 2 LOOKING FORWARD IMPACT 2021 - PERCENTAGE OF ALL RESPONDENTS INDICATING "CONCERNED."
Question text: How concerned are you about each of the following association strategies over the next three years?

As the year progressed, concerns about meetings diminished. The following chart shows the response to the same question by all respondents in June 2021, on the Looking Forward® 2021 Solutions survey.

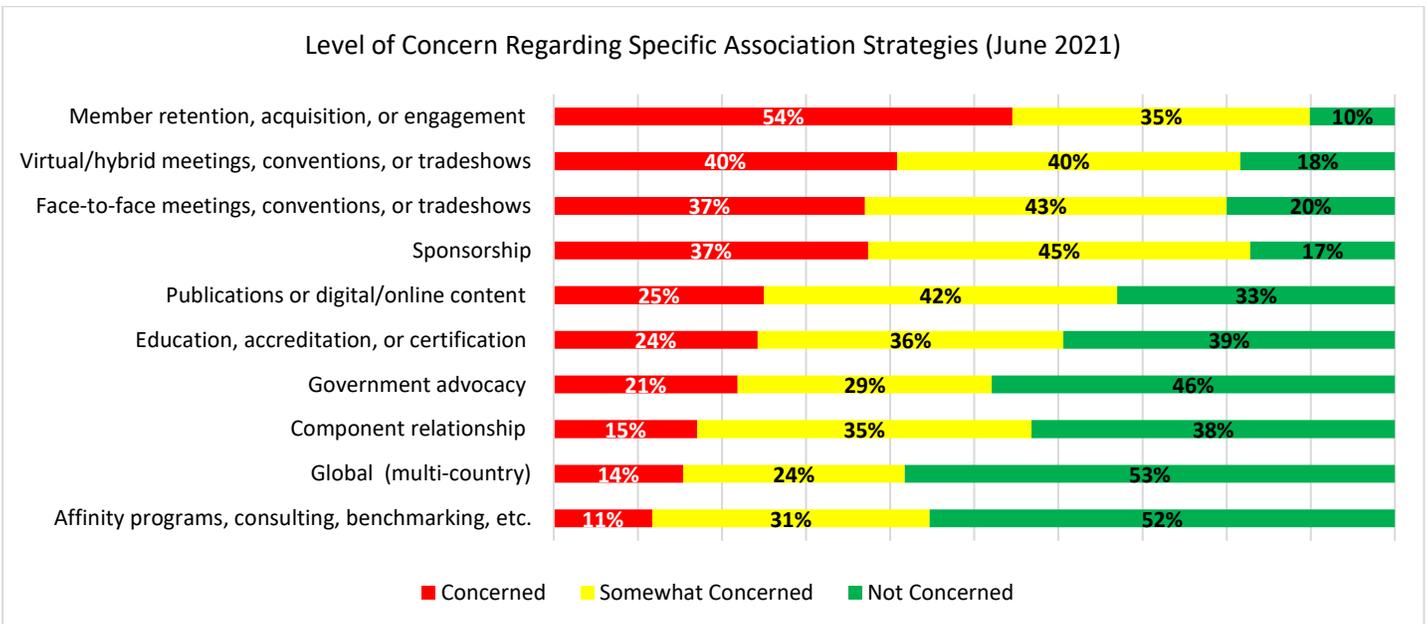


FIGURE 3 LOOKING FORWARD SOLUTIONS 2021 – PERCENTAGE OF ALL RESPONDENTS INDICATING “CONCERNED”
Question text: How concerned are you about each of the following association strategies over the next three years?

At the end of 2021, in research conducted for Looking Forward Impact, membership remained the most substantial area of concern. Notably, though, concerns regarding strategies relevant to *government advocacy* increased.

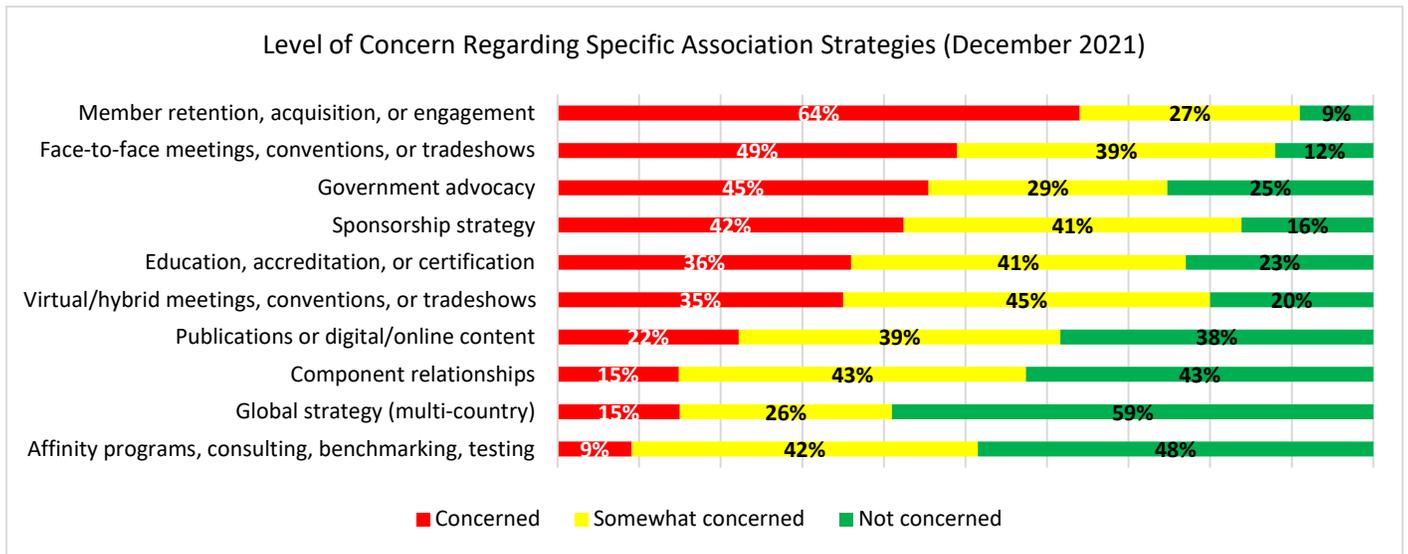


FIGURE 4 LOOKING FORWARD IMPACT 2022 – PERCENTAGE OF ALL RESPONDENTS INDICATING “CONCERNED”
Question text: How concerned are you about each of the following association strategies over the next three years?

In December 2019, 43% of respondents to Looking Forward® Impact were concerned about membership.

Today, in the spring of 2022, 56% are concerned about membership. Concerns surrounding face-to-face meetings, continue to decline as the COVID-19 pandemic recedes as a practical matter on strategy. The following is the level of concern for each strategy by all respondents.

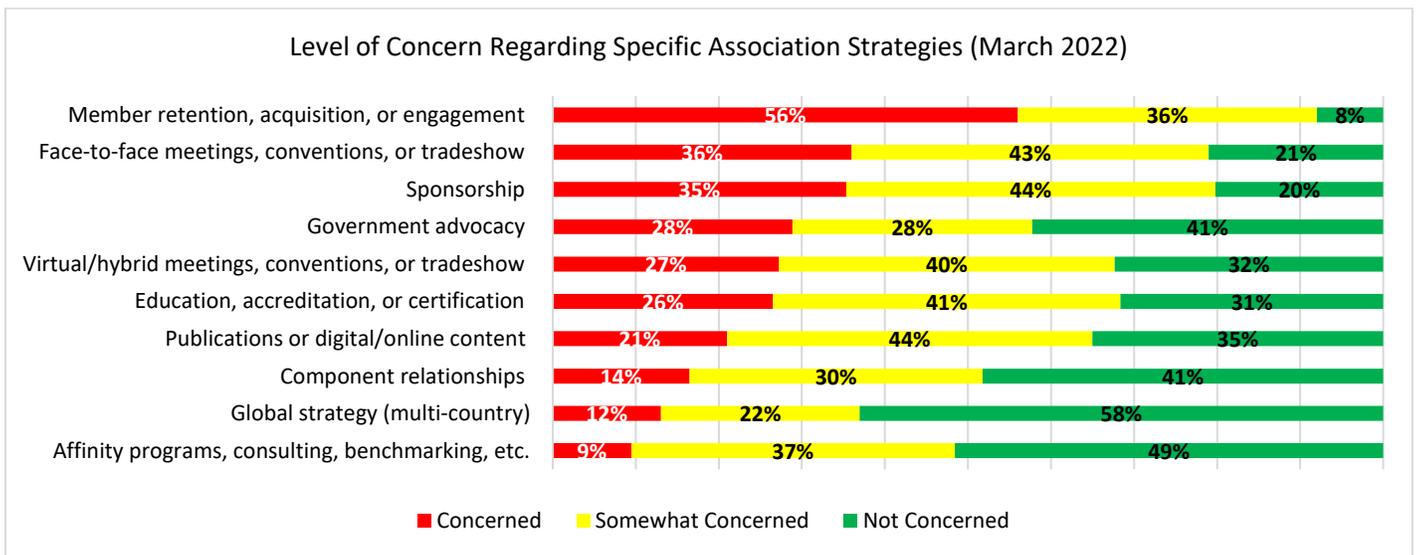


FIGURE 5 LOOKING FORWARD SOLUTIONS 2022 – PERCENTAGE OF ALL RESPONDENTS INDICATING “CONCERNED”
Question text: How concerned are you about each of the following association strategies over the next three years?

The Strategies Considered Essential to Success

Association Laboratory investigated potential strategies within 11 domains. Ten of these domains were externally or market focused. One domain, *Governance and Leadership Strategies*, looked internally at what associations are doing to improve their capacity and capability to make change.

The following section outlines the results of this investigation by Domain.

11 Domains

- 1.Membership, Retention, Acquisition and Engagement
- 2.Meeting, Convention and Tradeshow
- 3.Face to Face and Exhibitor
- 4.Hybrid or Virtual
- 5.Sponsorship
- 6.Publications or Digital/Online Content
- 7.Education, Accreditation or Certification
- 8.Government Advocacy
- 9.Component Relationship
- 10.Global
- 11.Governance and Leadership

} Part of Meeting, Convention and Tradeshow

Membership Retention, Acquisition and Engagement Strategy

Looking Forward® Solutions assessed general membership strategies as well as strategies considered more specific to membership models.

General Membership Strategy

In Looking Forward® Impact, respondents identified creating awareness with non-members as a substantial challenge. As a result, a variety of general communication and promotional strategies were tested in Looking Forward® Solutions. The following identifies the percentage of respondents who identified each strategy and changes since 2021.

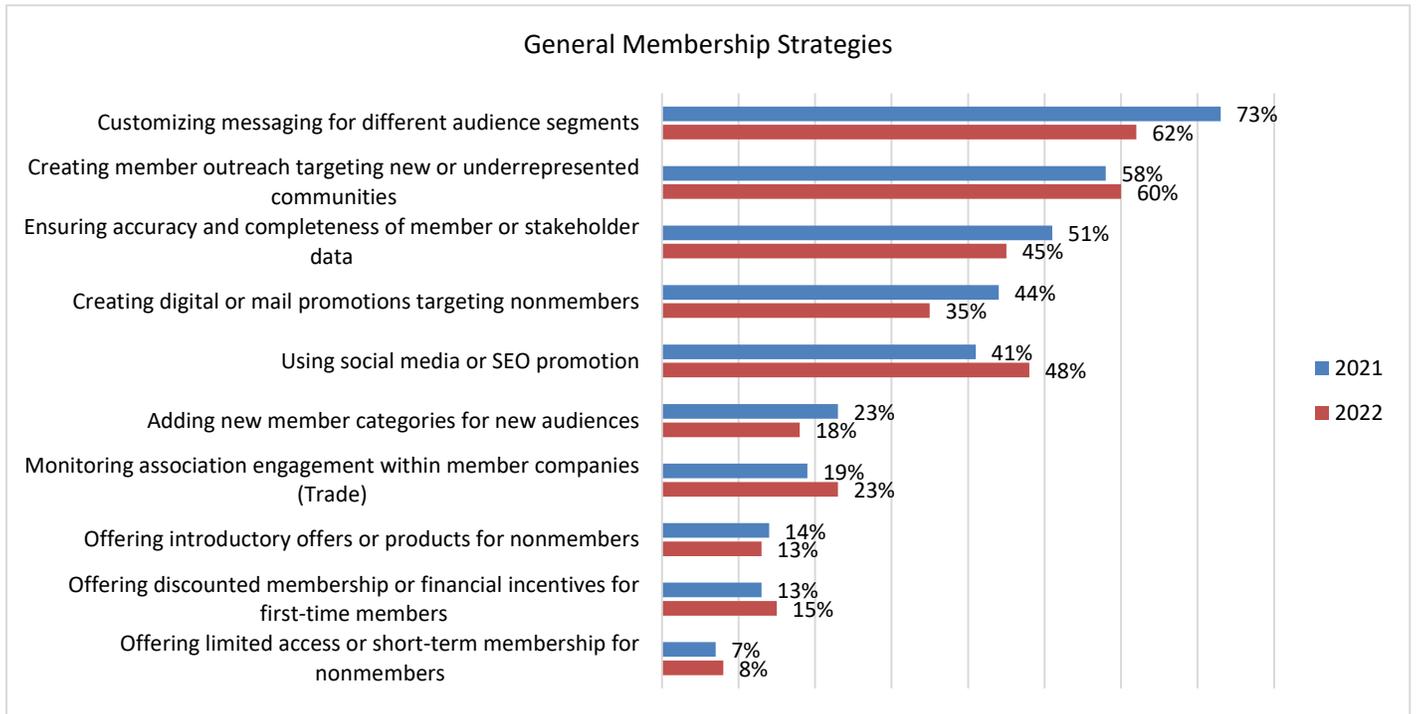


FIGURE 6 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF ALL RESPONDENTS SELECTING EACH OPTION

Question text: When addressing membership awareness and acquisition, which of the following three strategies are most important to your association? Select up to three.

Membership Model Strategy

In addition, the data from Looking Forward® Impact identified challenges specific to membership modeling. Looking Forward® Solutions assessed strategies specific to membership modeling in more detail. The following identifies the percentage of respondents who identified each strategy.

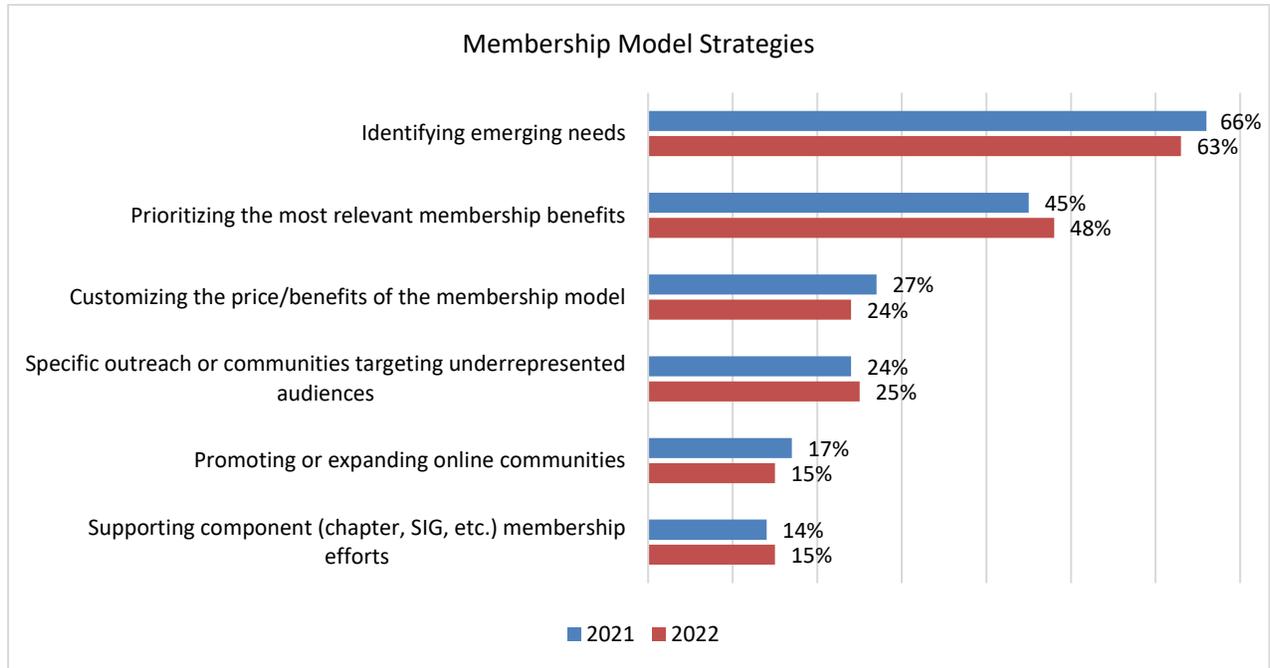


FIGURE 7 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF ALL RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing member modeling, which of the following three strategies are most important to your association? Select up to three.

Meeting, Convention and Tradeshow Strategy

Looking Forward® Solutions tested a wide variety of strategies linked to face-to-face, virtual and hybrid strategies. In addition, the study examined complimentary strategies such as sponsorship. Therefore, this section contains the following sub-domains.

- Face-to-Face Meeting Strategies
 - Exhibitor Strategies at face-to-face meetings
- Virtual or Hybrid Meeting Strategies
- Sponsorship Strategies

The following provides additional detail on each of these areas.

Face-to-Face Strategy

The landmark study, [The Strategic and Economic Impact of COVID-19 on Associations](#), found that between 30% and 35% of association gross revenue came from face-to-face meetings. Given the pandemic’s impact on face-to-face meetings, and considering the association sector’s reliance on these strategies, it was critical to assess what strategies association executives saw emerging from the pandemic. The following identifies the percentage of respondents who identified each strategy.

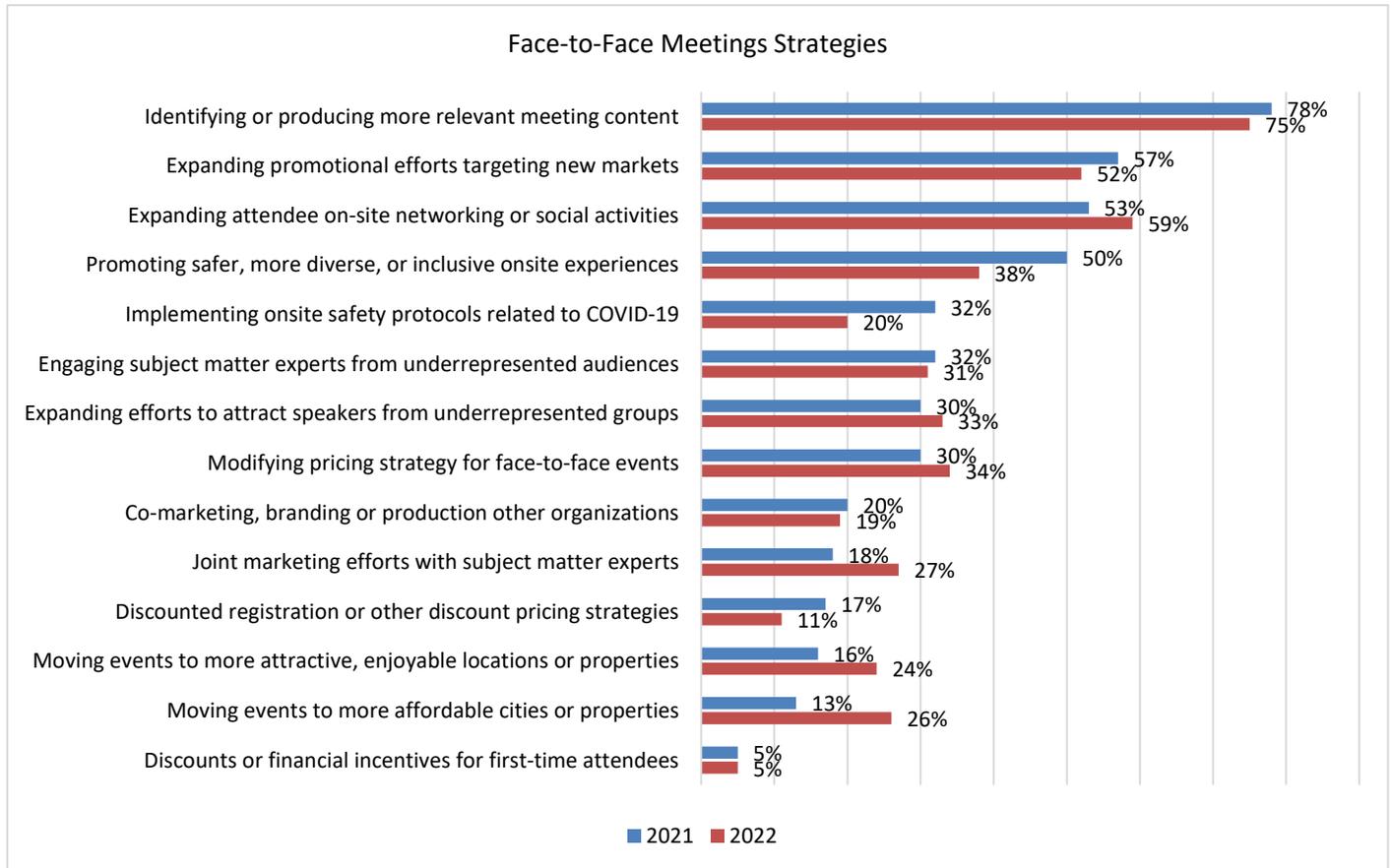


FIGURE 8: LOOKING FORWARD SOLUTIONS 2022 – PERCENTAGE OF ALL RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing face-to-face meetings or convention challenges, which of the following three strategies are most important to your association? Select up to three.

Exhibitor Strategy

Critical to many successful meetings is the tradeshow or exhibition.

Looking Forward® Solutions tested a wide variety of strategies specific to tradeshow at face-to-face meetings to identify emerging areas of focus. The following identifies the percentage of respondents who identified each strategy.

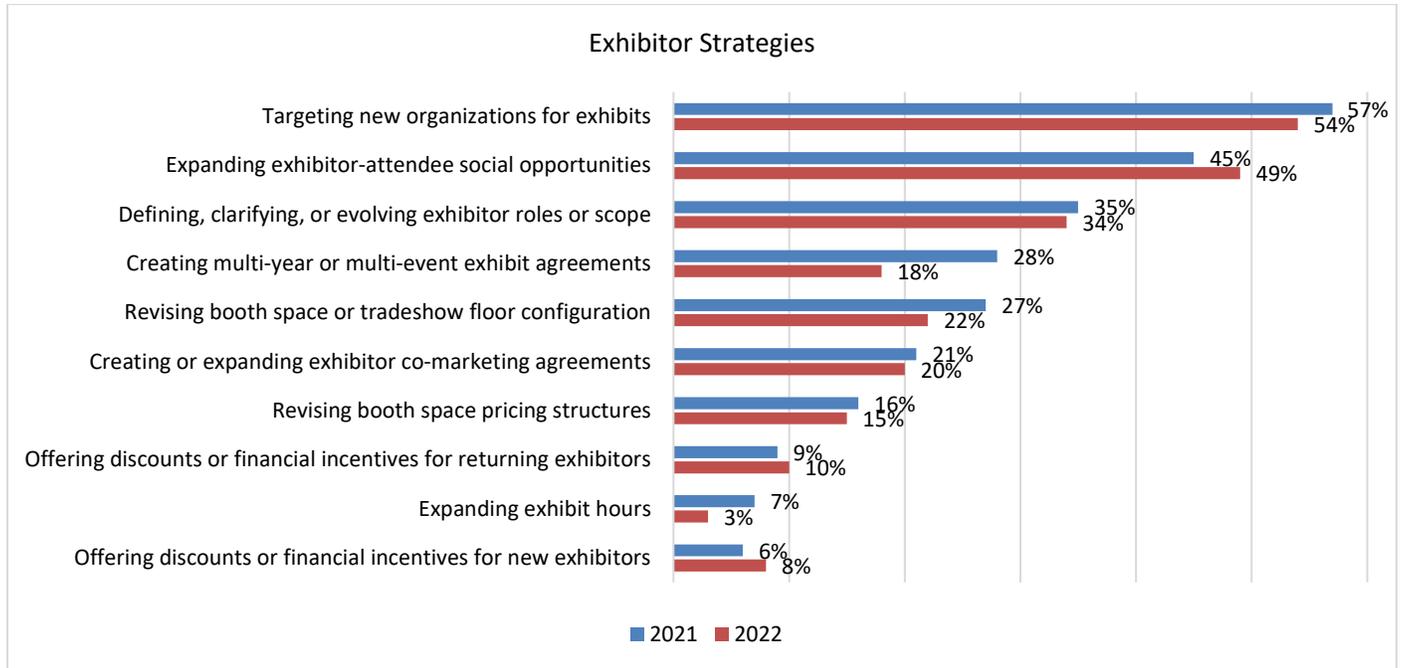


FIGURE 9 LOOKING FORWARD SOLUTIONS – PERCENTAGE OF ALL RESPONDENTS ANSWERING EACH OPTION

When addressing exhibitor challenges at face-to-face meetings, which of the following three strategies are most important to your association?
Select up to three.

Hybrid or Virtual Strategy

Hybrid Strategy

One of the most substantial innovations during the last year was the evolution of hybrid meeting strategies, combining face-to-face events with the some of the attributes of virtual events. The following identifies the percentage of respondents who identified each strategy.

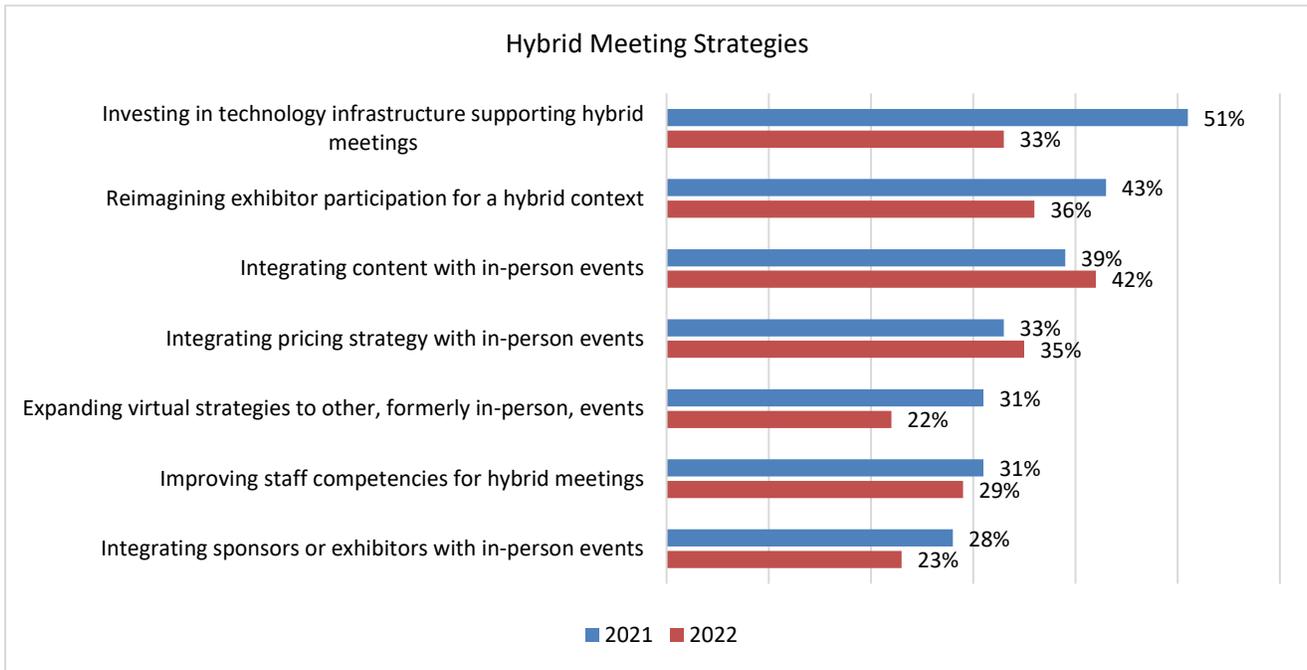


FIGURE 10 LOOKING FORWARD SOLUTIONS – PERCENTAGE OF ALL RESPONDENTS ANSWERING EACH OPTION

Question Text: When addressing hybrid meeting challenges, which of the following three strategies are most important to your association? Select up to three.

Virtual Strategy

Many associations implemented virtual events for the first time beginning in 2020 to adapt to the pandemic. The following identifies the percentage of respondents who identified each strategy.

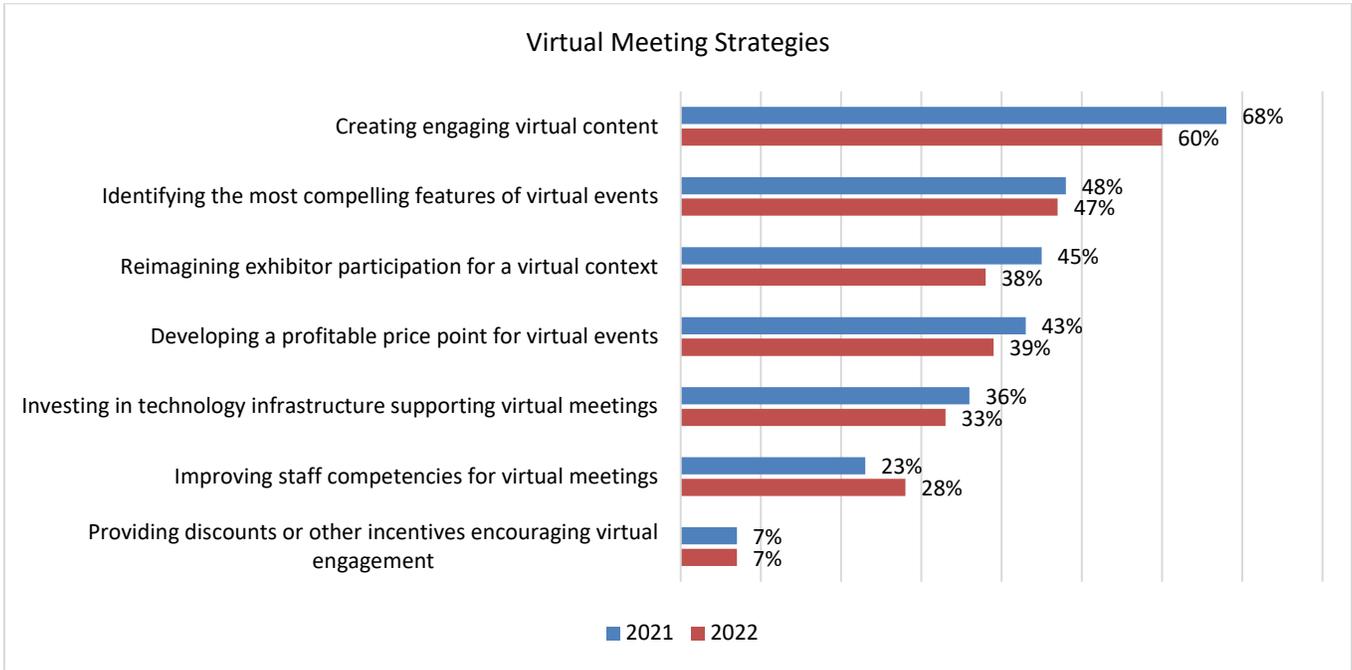


FIGURE 11 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing virtual meeting challenges, which of the following three strategies are most important to your association? Select up to three.

Sponsorship Strategy

Sponsor strategies are integral to many face-to-face meetings and were thus incorporated into the Meeting, Convention, and Tradeshow Strategy Section. The following identifies the percentage of respondents who identified each strategy.



FIGURE 12 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing sponsorship challenges, which of the following three strategies are most important to your association? Select up to three.

Publications or Digital/Online Content Strategy

The Looking Forward® Impact study identified content and related strategies as increasingly important as associations attempt to extend their reach into other audiences. To begin assessing these strategies, a distinct Publication or Content Domain was created. The following identifies the percentage of respondents who identified each strategy.

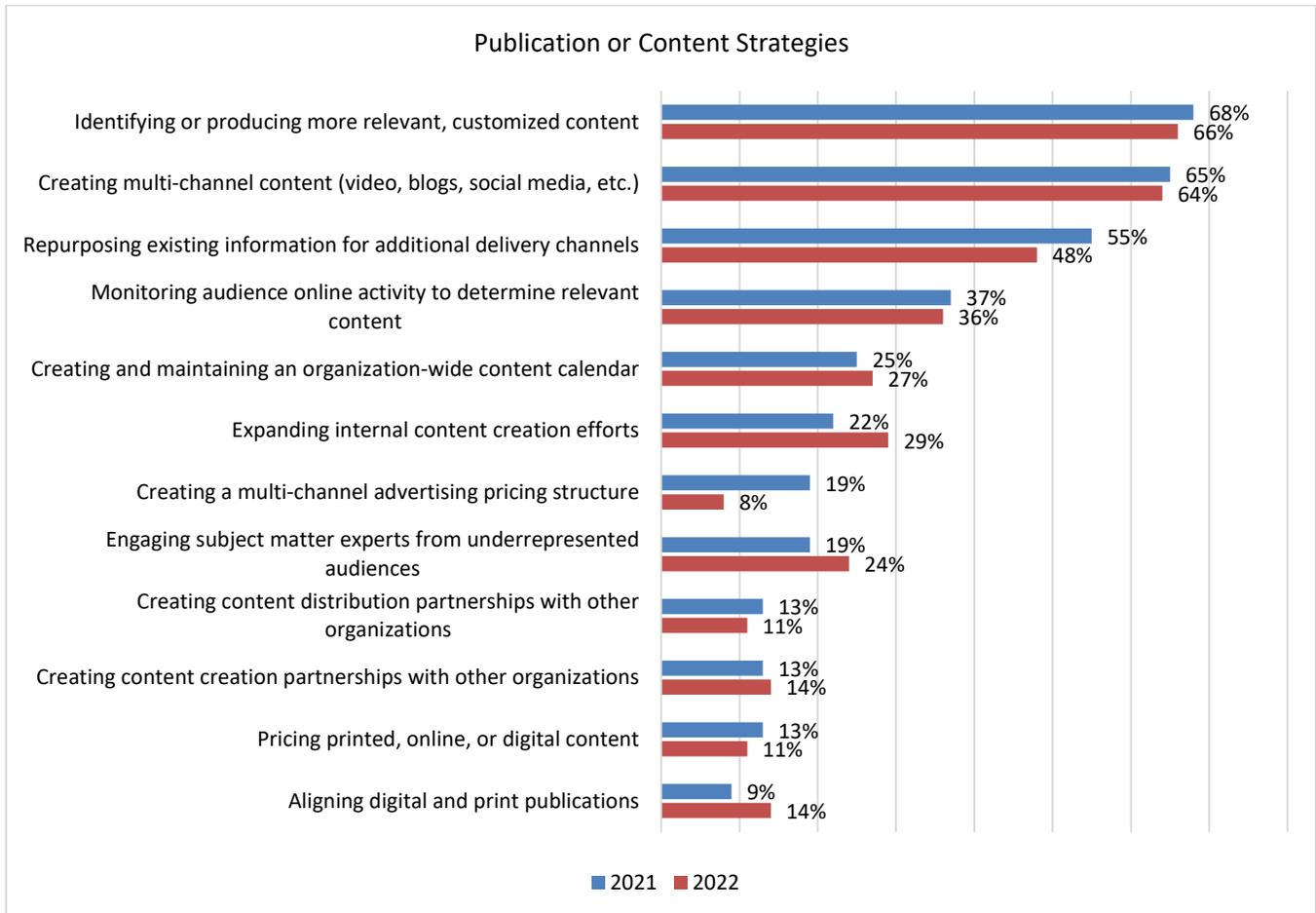


FIGURE 13 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing publications or content challenges, which of the following three strategies are most important to your association?
Select up to three.

Education, Accreditation or Certification Strategy

Historically, associations have pursued education, or more specifically, credentialing strategies such as certification or accreditation to ensure knowledge transfer and competency validation. The Education and Credentialing Domain assess the primary strategies in this area. The following identifies the percentage of respondents who identified each strategy.

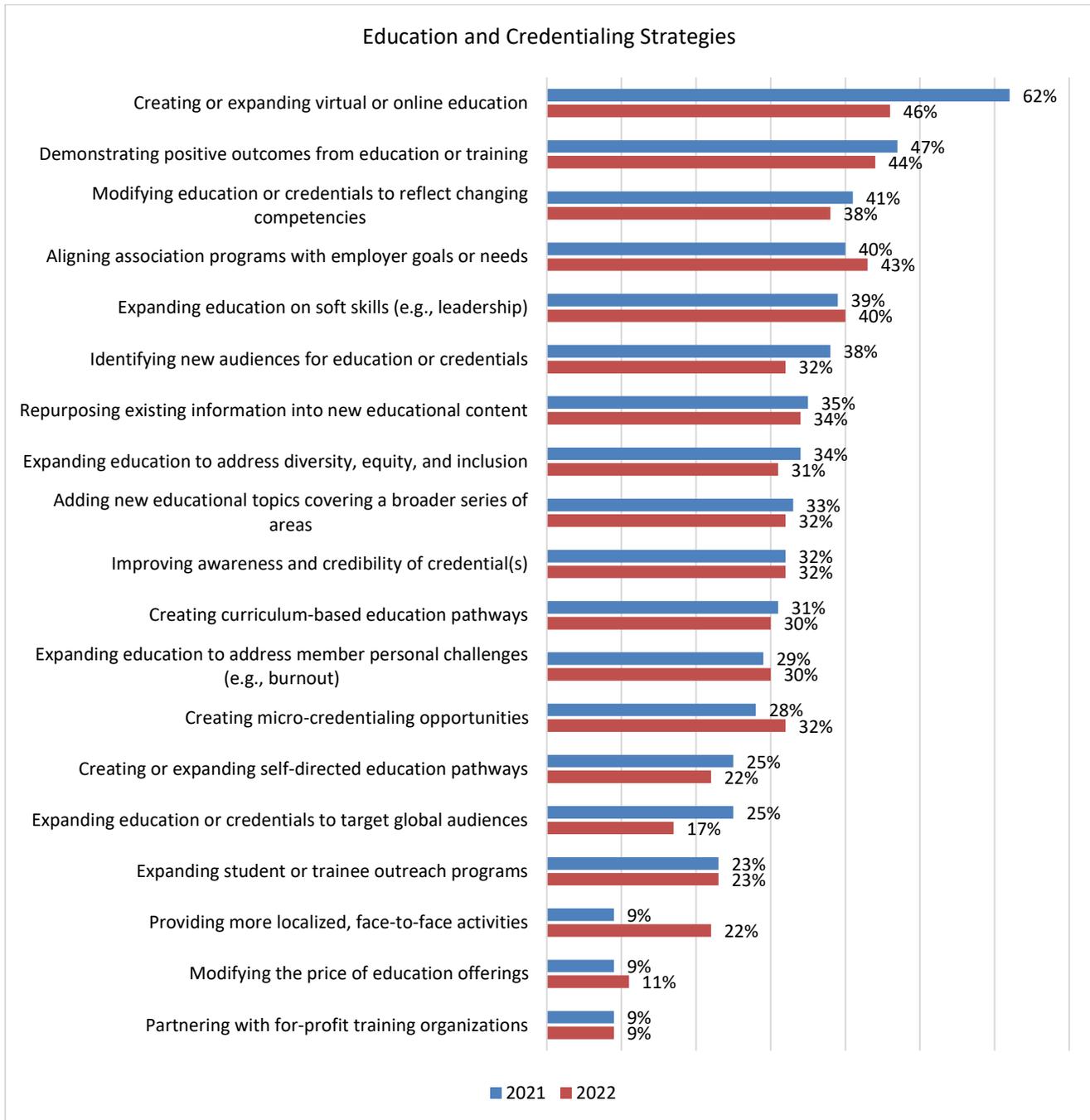


FIGURE 14 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing education or credentialing challenges, which of the following three strategies are most important to your association? Select up to three.

Government Advocacy Strategy

To properly assess government advocacy strategies, it was critical to a) identify the government jurisdiction or “scope” that was perceived to have the most impact, then b) assess distinct strategies with each domain.

Scope of Policy Impact

The following chart highlights year-over-year changes in respondents’ perceptions of the government jurisdiction having the most impact on their members and, thus, policy and advocacy strategy.

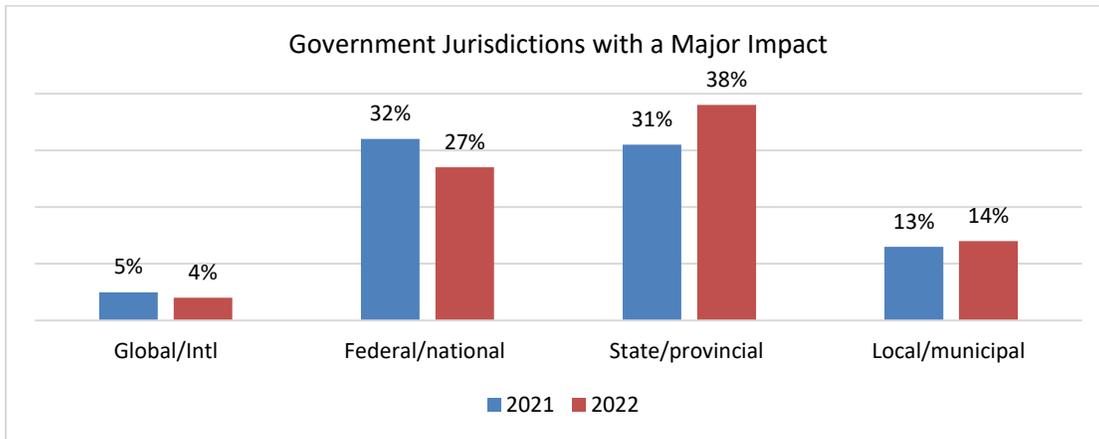


FIGURE 15 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING “A MAJOR IMPACT”

Question Text: How much impact will policy makers in each of the following government jurisdictions have on your members over the next three years?

The following chart highlights respondents’ perceptions of the government jurisdiction having the most impact on their members and, thus, policy and advocacy strategy for 2022.

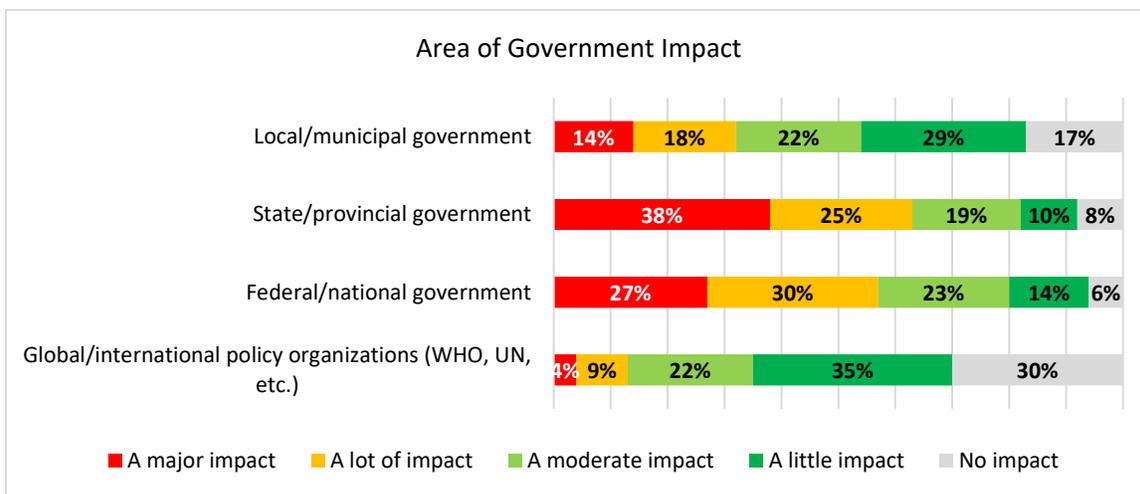


FIGURE 16 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: How much impact will policy makers in each of the following government jurisdictions have on your members over the next three years?

Advocacy Strategy

Within the Advocacy Domain, a variety of strategies are being pursued. The following identifies the percentage of respondents who identified each strategy.

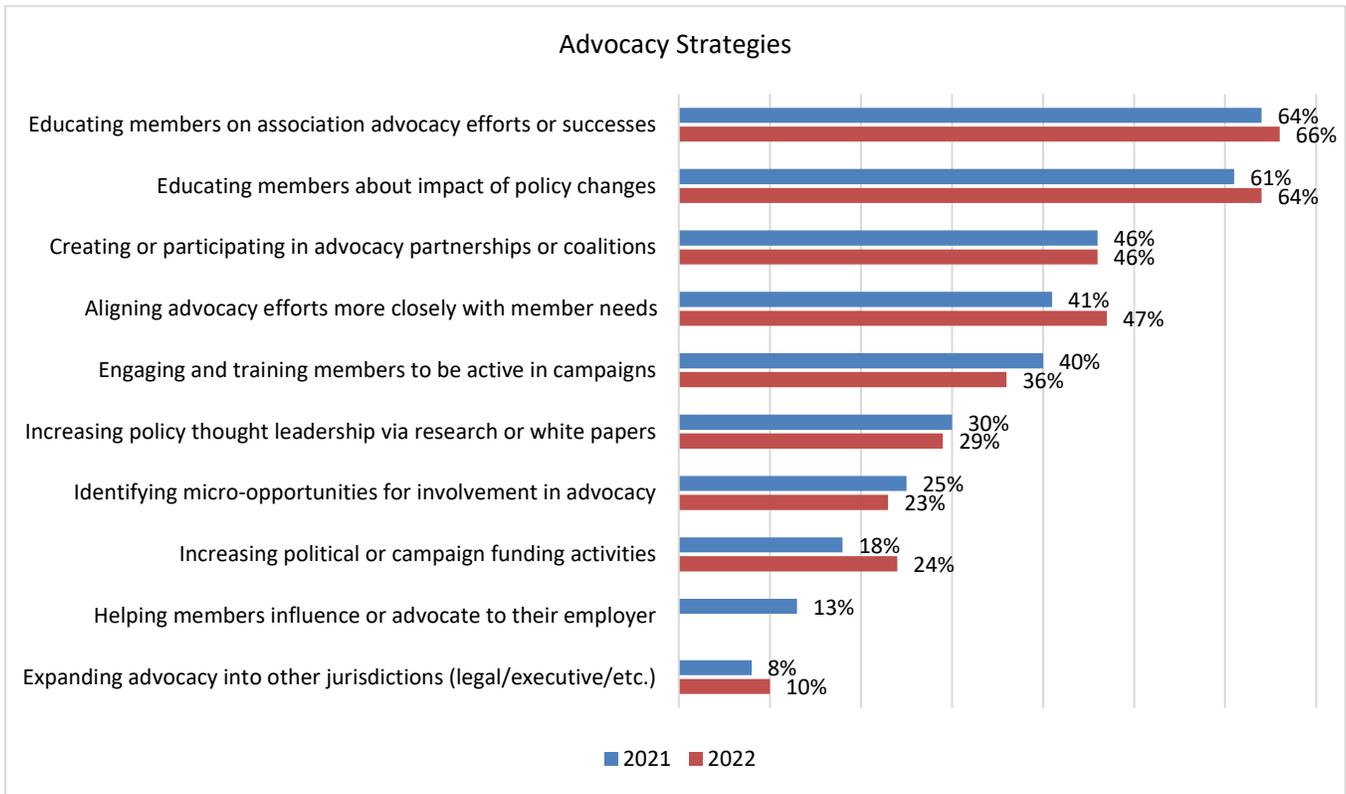


FIGURE 17 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing advocacy challenges, which of the following three strategies are most important to your association? Select up to three.

Component Relationship Strategy

Many associations are a component of a broader parent body or consist of smaller components. A positive relationship between components and across component networks is often key to a successful membership value proposition and member service. The following identifies the percentage of respondents who identified each strategy.

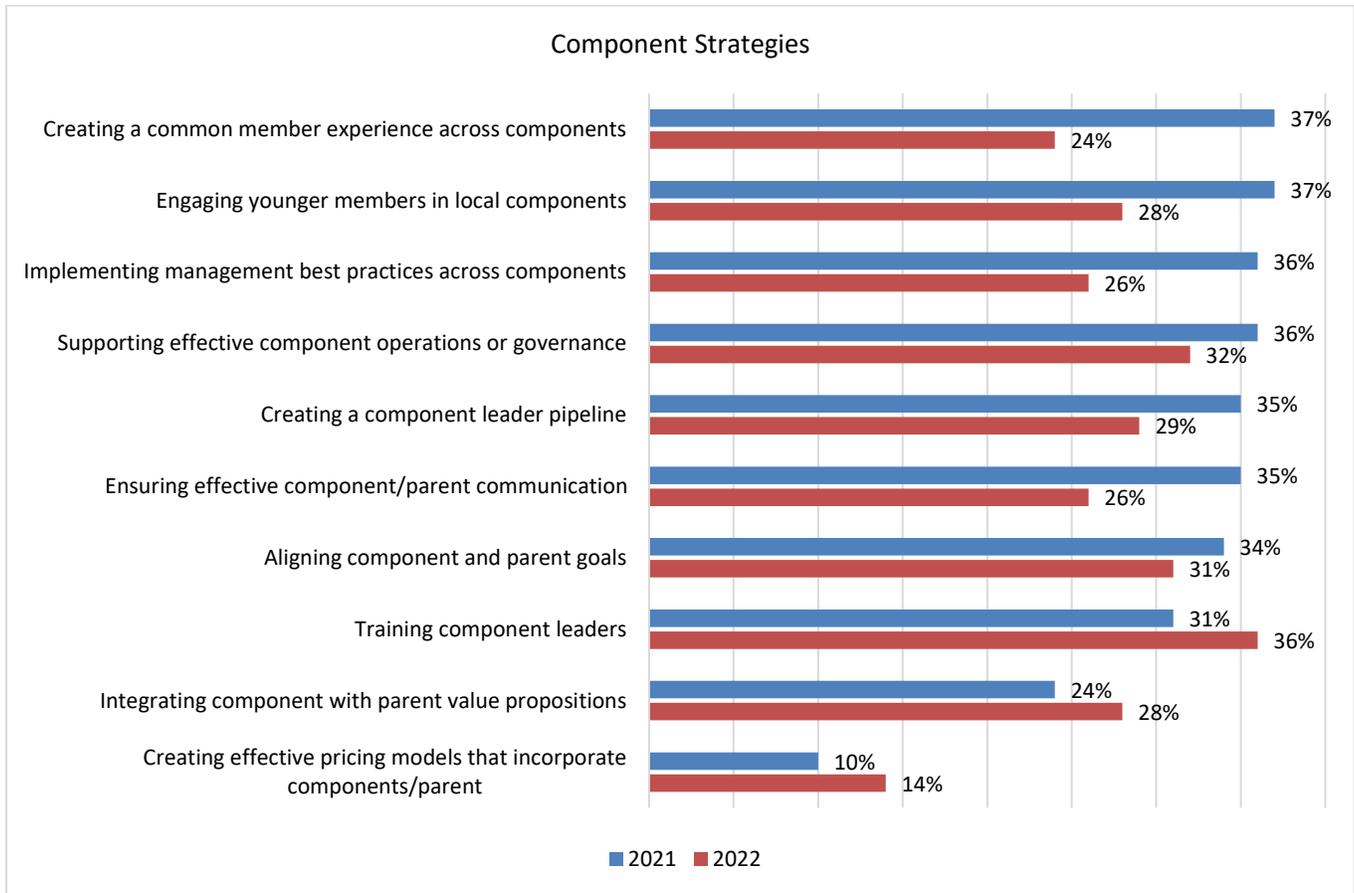


FIGURE 18 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS WHO SELECTING EACH OPTION

Question Text: When addressing component challenges, which of the following three strategies are most important to your association? Select up to three.

Global Strategy

Many associations are international, heavily based within a single country but having operations or activities outside of this country. In addition, there are truly global associations with a truly global scope. Individuals who identified as representing international or global associations were asked to assess strategies within the Global Domain. The following identifies the percentage of respondents who identified each strategy.



FIGURE 19 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: When addressing global challenges, which of the following three strategies are most important to your association? Select up to three.

Governance and Leadership Strategy

Following the assessment of external strategies, the study assessed internally focused strategies, providing evidence of potential governance, operational or other structural changes necessary for success. The following identifies the percentage of respondents who identified each strategy.

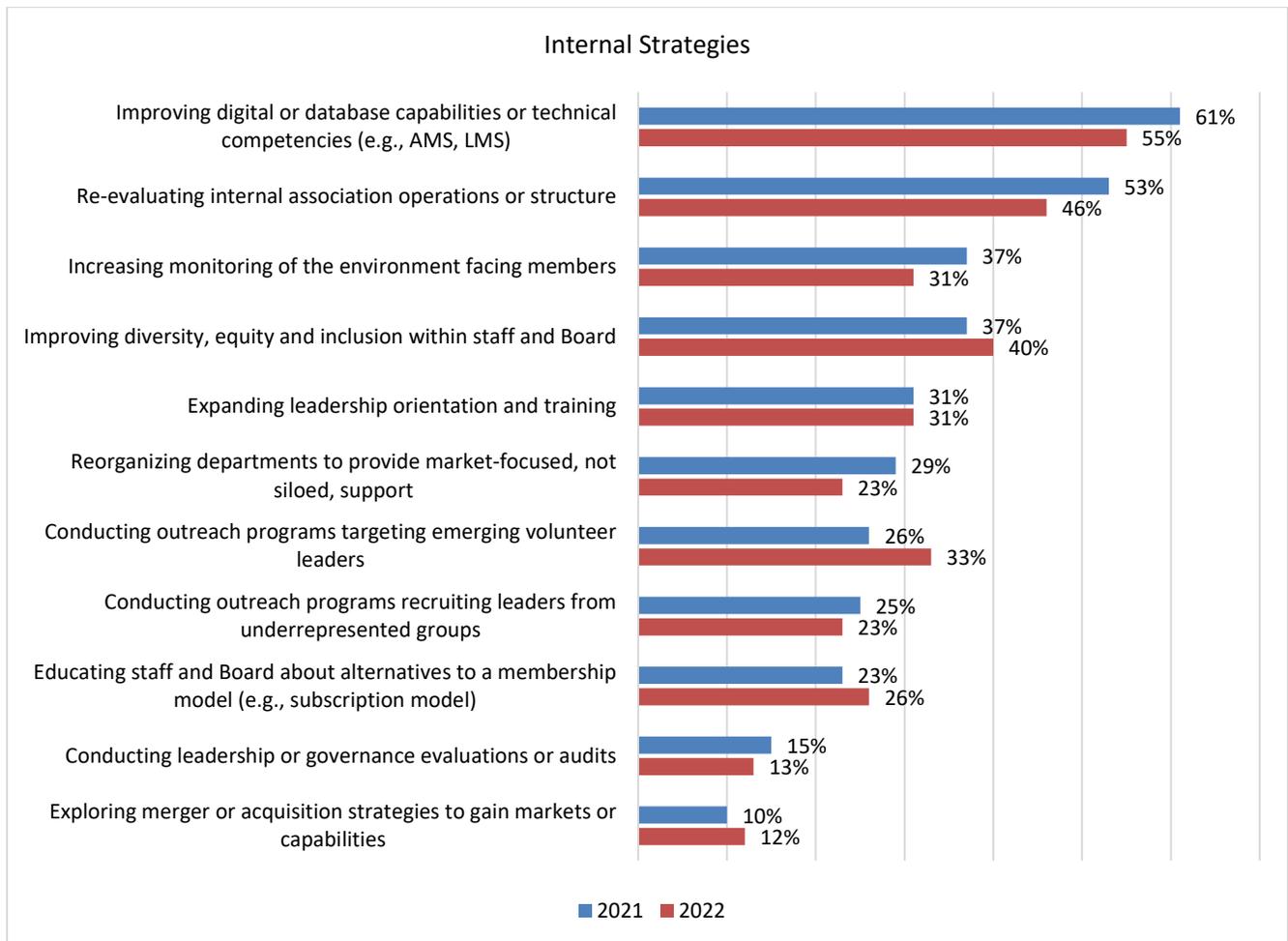


FIGURE 20 LOOKING FORWARD SOLUTIONS - PERCENTAGE OF RESPONDENTS SELECTING EACH OPTION

Question Text: What are the internal strategies most important to your association as it considers how to be more successful?
Select up to three.

Closing

The association sector is emerging from the COVID-19 Pandemic.

We will now begin to see whether or not the innovations that allowed so many associations to survive, if not prosper, will be institutionalized or if the sector returns to its traditional ways.

At Association Laboratory, we will continue our commitment to giving you the strategic insights, sector information and educational opportunities you need to thoughtfully consider your future and develop strategies to make your professional and organizational success a reality.

Please use the information from Looking Forward® Solutions contained in this executive summary, and accessible via the customizable dataset located on the [Looking Forward® Dashboard](#), to inform the decisions that are critical to the success of your association.

You are designing your organization (and your life) to be successful, not just today, but for some future point. The starting point for this conversation always begins by facing the future unafraid and with eyes wide open.

Please contact Association Laboratory if you believe we can help in any way.

Appendix 1: Accessing the Looking Forward™ Dashboard.

The most recent, relevant, and customizable data to inform your decisions is critical in a dynamic and uncertain environment.

For more than 10 years, Association Laboratory has produced sector research examining the environment facing members and the implications of this environment on their relationship with associations. To succeed in a dynamic, competitive, and interconnected world, it will be critical for association leaders to make faster, better decisions. You will need to know what the future looks like now, not later.

Looking Forward® sector data is now provided via a customizable dashboard, allowing you to focus on the segment of the association sector most critical to you, your staff and Board. See what issues are impacting members and identify the most likely challenges you'll face. Then download the custom report to guide discussions with your team and volunteer leaders.

[Click here for the Looking Forward Dashboard](#)

How to use the dashboard

The Looking Forward® Dashboard provides you with an overview of the sector studies conducted by Association Laboratory. It is a simplified representation of the data. It does not, for example, provide unique N counts (respondents/individual question) for each question.

It is expected that as you select an individual report and drill down into the data and customize your report to your needs, only the most relevant data per question will be included. As a result of the different counting methodologies and the natural limitations of a published document requiring data counts at a particular time, there may be minor differences between published documents and the Looking Forward® Dashboard.

The homepage of the data dashboard identifies the different sector data sets you can access. Simply select the study of interest and the dashboard will display top-level results. Clicking “Explore” in each chart will allow you to dig deeper into that topic area.

Each chart has a book icon in the bottom right corner, which allows you to see the question that was asked of respondents.

In addition, once you clicked “Explore,” you will see a list of filters along the right side of the page. These filters allow you to adjust the data set by annual budget, member size, organization type, location, profession, and organization type (meaning professional or trade).

At the bottom of each page, the printer graphic allows you to print a PDF of the page to use in conversations with your Board.

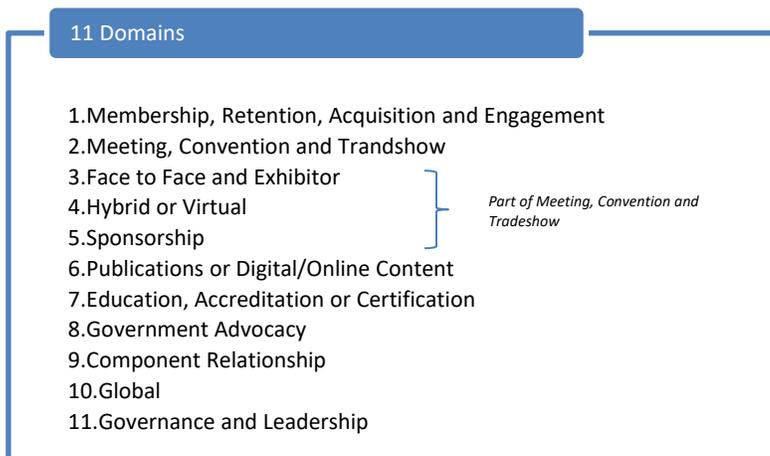
Appendix 2: Methodology

Looking Forward™ Solutions 2021 is designed to provide an ongoing picture of the strategies considered most critical to the success of trade and professional associations.

Association Laboratory developed and deployed an online survey directly and via collaboration with the company's Research Alliance partners. Data collection took place between July 14 and July 30, 2021.

Response options for *Looking Forward® Solutions 2021* were informed by the quantitative and qualitative research collected for *Looking Forward® Impact 2021* and from a review of Association Laboratory client research projects ranging from strategic planning to membership value proposition.

The study assesses strategies in the following domains:



For each domain, participants were shown a list of strategies and asked to select up to three that they believed would be most important to their association:

Example: *“When addressing exhibitor challenges at face-to-face meetings, which of the following three strategies are most important to your association? Select up to three.”*

A total of 314 individuals completed the survey. The response includes:

- 172 respondents were association Chief Staff Officers
- 103 respondents representing Trade associations.
- 162 respondents representing Professional associations.
- Over 20 industries and professions are represented.

Appendix 3: About Association Laboratory

Association Laboratory helps association leaders make better decisions through research and strategy consulting services, dissemination of association sector research insights and the education of association leaders.

The award-winning company is a national leader in developing sustainable, successful strategy for associations and has been advising associations since 1999 from offices in Washington, DC and Chicago, IL. You can learn more about us at www.associationlaboratory.com.

Research and Strategy Consulting Services

Association Laboratory is a full-service research and strategy firm. We lead evidence-based, collaborative engagements addressing the spectrum of association challenges. From strategic planning and membership model design to online education and global expansion, the company helps you identify and implement successful business strategy.

Common engagements include the following.

| | |
|-----------------------------|--|
| Strategic Planning | Membership Value Proposition and Modeling Strategy |
| Environmental Scanning | Online Education Strategy |
| Content Strategy | Virtual Event Value Proposition Strategy |
| Credentialing Strategy | Component Value Proposition Strategy |
| Face-to-Face Event Strategy | Global Strategy |
| DEI Strategy | Emerging Leader Strategy |

Association Sector Research and Insights

Association Laboratory collects and disseminates association sector research aggregating information collected from hundreds of association leaders; providing you with the most recent, relevant, and useful information you need to guide conversations at your association.

Association Leader Education and Competency Development

Association Laboratory produces strategic educational content designed to help association leaders develop the competencies necessary for success. Research-based and peer driven this content provides you with an engaging, effective means of improving the success of your leadership and decision-making.