

Digital Member Study

Examining the Gap Between Member Expectations and Association Technology



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Survey conducted by:

Edge Research



Community
Brands

Overview

The way we connect, communicate, learn, and shop is ever changing. Consequently, your members have a heightened level of expectation for flexibility, convenience, and personalization in everything they do. But, are their association experiences keeping up with this rapid pace of change? What constraints are holding back professional member organizations from progressing into the future?

We conducted this study to better understand current member experiences and the technology that supports them. We wanted to look towards the future to better understand the importance of emerging technologies and how members would like to engage with their professional membership organizations.

Our research set out to answer four essential questions:

- What role does technology play in driving member loyalty?
- Where do gaps exist between member expectations and the experiences organizations are delivering today?
- What level of personalization do members want?
- How prepared are professional membership organizations to meet the rising expectations of members?

We hope these findings help professional membership organizations evaluate their own technology and member experiences. This study should serve as a baseline for the shifting expectations of members, and justification for technology investments to increase member loyalty and retention.

Edge Research administered parallel surveys to more than 1,000 members of professional membership organizations and 400 staff representatives who work at these organizations. The studies examined attitudes, values, and behaviors on technology from both perspectives. The online surveys took place between October 18 and October 30, 2017. Full survey methodology details available on page 21.

Here's what we learned.

Key Findings

- **Technology drives member loyalty.** There is a strong correlation between loyalty and technology. Members who see their organization as an early technology adopter are significantly more satisfied with their membership and feel more connected to their organization.
- **Members are ahead of the technology adoption curve.** Sixty-three percent of members say technology plays a big role in their life. The majority of members describe themselves as ahead of the curve or early adopters of technology.
- **There's a growing member experience disconnect.** Gaps exist between what members value and where they believe their organization delivers the best experiences. Members give lower technology experience ratings for many of the key benefits that drive retention, such as certifications, training, and advocacy.
- **Professional membership organizations don't leverage personalization.** A majority of organizations believe personalization makes members feel more engaged. However, the majority today do not put enough emphasis on creating a personalized experience with recommended content that members value.
- **The future is analytical, predictive, and personalized.** Organizations that consider themselves early adopters are more likely to use data science and predictive intelligence. The majority of organizations are also interested in providing more personalized content, based on past activity.
- **Professional membership organizations do NOT feel prepared to meet member expectations.** Few see their organization as technologically advanced or even technologically prepared for the future and able to meet members' expectations. Thirty percent of surveyed staff describe their organization as laggard when it comes to technology adoption.
- **Only a quarter of professional membership organizations say they will increase their technology investments in the future.** The main barriers are cost, questions about return on investment (ROI), and the ability to impact the member experience, as well as concerns about integrations and member usage.

Section 1: Technology Drives Member Loyalty

There is a strong correlation between member loyalty and technology. Members who believe their professional membership organization is an early technology adopter are generally more satisfied and feel more connected to their organization (see **Figure 1** and **Figure 2**). We see these loyalty metrics rise even more when members perceive their organization's use of technology as "excellent." However, only 26 percent of members surveyed currently rate their professional membership organization as "excellent" when it comes to technology usage.



Figure 1: Overall, how satisfied are you with your membership in this professional membership organization?

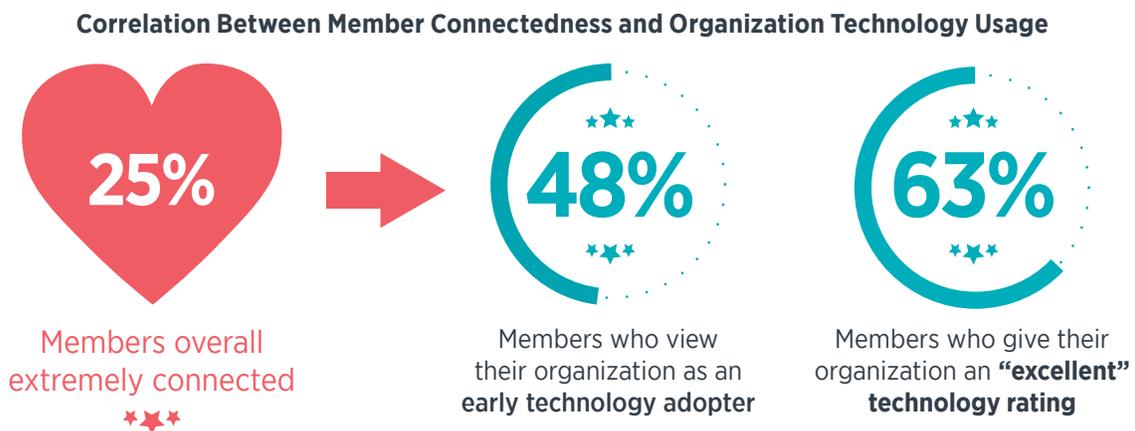


Figure 2: How connected do you feel to this professional membership organization and the work that it does?

Figure 3 looks at the breakdown of where members feel their professional membership organization falls on the technology adoption spectrum. Interestingly, professional membership organizations rate themselves even lower on the technology adoption spectrum than members (see **Figure 4**). Only one-third say their organization uses new technology ahead of the curve.

Organization Technology Adoption

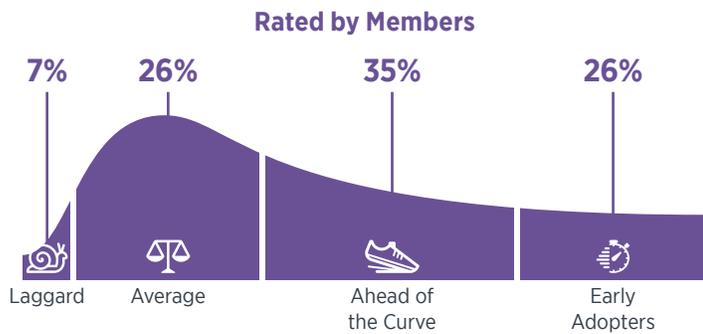


Figure 3: How would you describe your professional membership organization's adoption of new technologies? (rated by members)

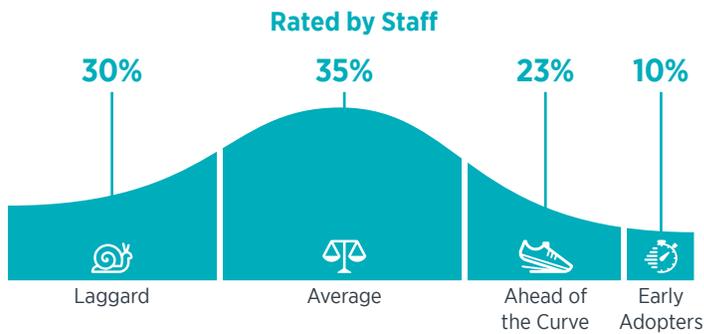


Figure 4: How would you describe your organization's adoption of new technologies? (rated by staff)

Below, **Figure 5** shows the most widely-used technology by professional membership organizations. Many organizations are using email marketing, association management software (AMS), event management solutions, and webinar tools. Fewer are using technology that aligns with member priorities, for example, job boards, learning management systems (LMSs), and advocacy systems. Later in the study we look into differences in technology usage for organizations that feel most prepared to meet the needs of their members.

Technology Set – Professional Membership Organizations

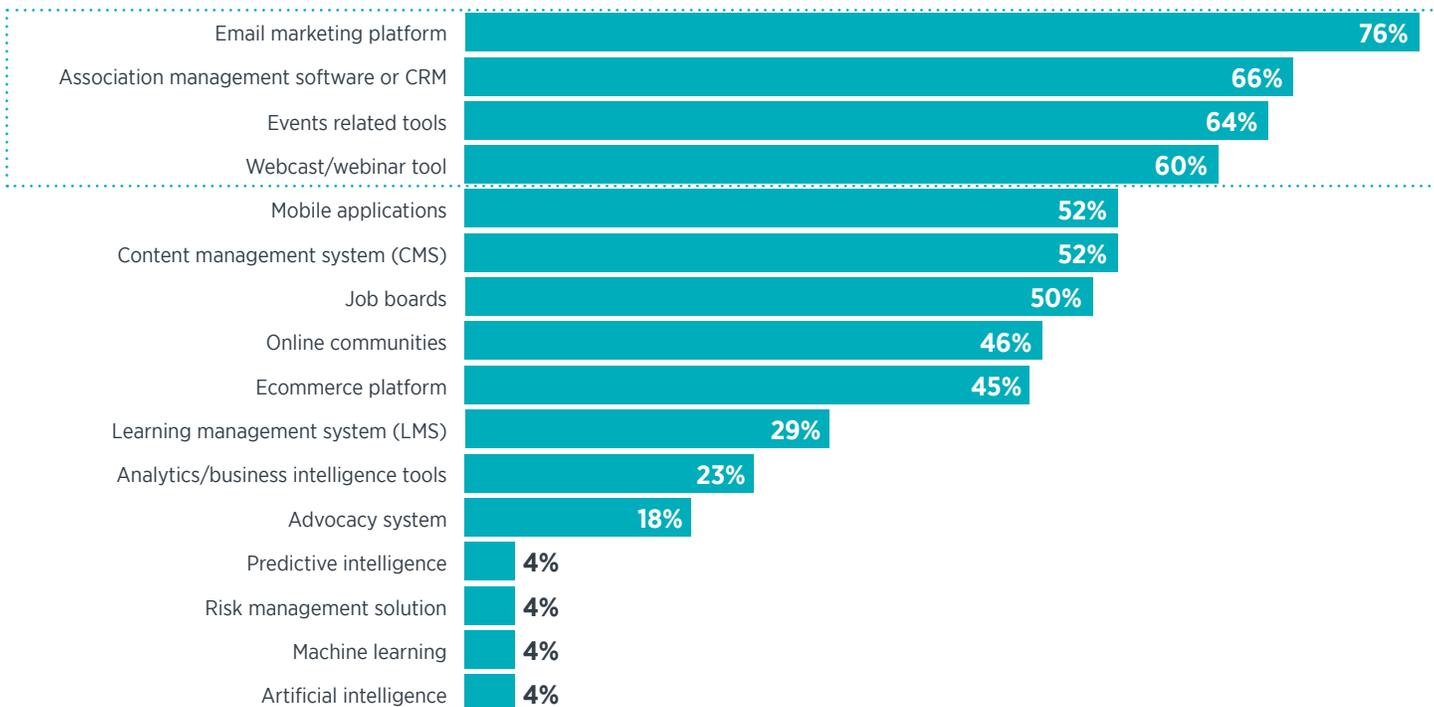


Figure 5: Which of the following technology/solutions does your organization use? (Select all that apply.)

PRO TIP!

Worried your organization is getting behind the curve? Don't jump at implementing every shiny new technology solution that comes to market. Invest in your selection process and focus on the needs of your membership and solutions that will improve member experiences for the digital activities they value most.

Section 2: Digital Behavior and Experiences

Technology plays a pivotal role in our everyday lives. Sixty-three percent of members surveyed say technology plays a big role in their life (**Figure 6**). This jumps to 74 percent when you look at Millennial members. **Figure 7** highlights the generational differences around the importance of technology. Approximately half of Boomers say technology plays a big role in their life today, and 86 percent of members representing the Mature generation say it at least plays some role in their daily life.

Technology’s Role in Members’ Daily Lives



Figure 6: What role does technology play in your life today?

Technology’s Role in Members’ Daily Lives: Generational Breakdown

	Millennials 1981-1999	Gen Xers 1965-1980	Boomers 1946-1964	Matures* 1945 or earlier
Technology plays a big role in my life today	74%	65%	51%	36%
Technology plays some role in my life today (about the same as everyone else)	24%	32%	42%	50%
Technology plays a small role in my life today	2%	2%	7%	14%

Figure 7: What role does technology play in your life today? (* small sample size)

When we further asked members about their technology adoption, the majority of members describe themselves as “ahead of the curve” (Figure 8). As expected, there are generational differences when it comes to how quickly members are adopting new technology (see Figure 9). Millennial members are significantly more likely to be early adopters, while Gen X and Boomer members fall in the middle of the spectrum. It’s important to note that the overwhelming majority of members pick up new technology on pace or faster than most. Based on the findings, we expect the proportion of early adopter members to continue to accelerate.

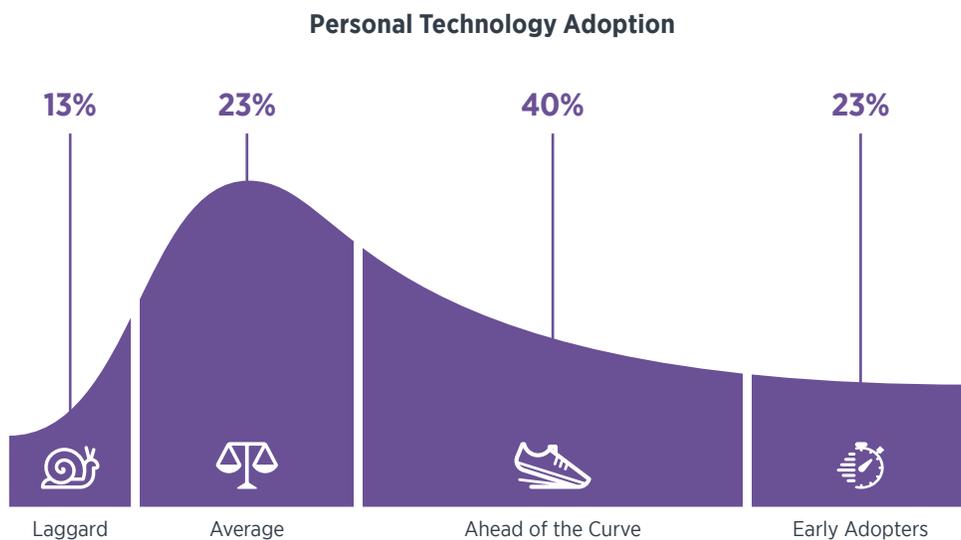


Figure 8: Thinking about the adoption of new technologies, which of the following statements best describes YOU personally?

Personal Technology Adoption: Generational Breakdown

	Millennials 1981-1999	Gen Xers 1965-1980	Boomers 1946-1964	Matures* 1945 or earlier
Early Adopters	37%	22%	10%	5%
Ahead of the Curve	38%	47%	36%	32%
Average	19%	21%	29%	23%
Laggard	7%	9%	21%	27%

Figure 9: Thinking about the adoption of new technologies, which of the following statements best describes YOU personally? (* small sample size)

Members are more immersed now than ever in digitally seamless experiences that are catered to their needs and how they like to consume information. The ways members buy services, engage with peers or colleagues, and access content is changing (**Figure 10**). The majority of members pay for some type of subscription to digital providers (such as Netflix or Amazon), and nearly half have used a mobile app to connect with someone new. We see these numbers rise even higher when looking at Millennial and Gen X members. Smartphones are the most widely used device by all generations, with 83 percent of members using a smartphone daily. Interestingly, member smartphone usage is slightly higher than the national average (77 percent) gathered by [Pew Research](#).

Changing Member Behavior

83% Have a paid online subscription



46% Have used an app or website to meet new people



83% Use a smartphone every day



Figure 10: How often do you engage in the following activities online?

Members are emailing, researching issues online, buying products and services, and texting all the time. **Figure 11** shows the most popular online activities by members. It's also important to call out that 90 percent of those surveyed participate in online banking, and a large majority (77 percent) are reading online articles and magazines.

They are also very active on Facebook and YouTube. Members who are early technology adopters are doing all online activities more often, and almost all (95 percent) have a paid online subscription. A large majority of early adopters (67 percent) have also used an app or website to meet new people.

Member Digital Activities on a Regular Basis/Sometimes

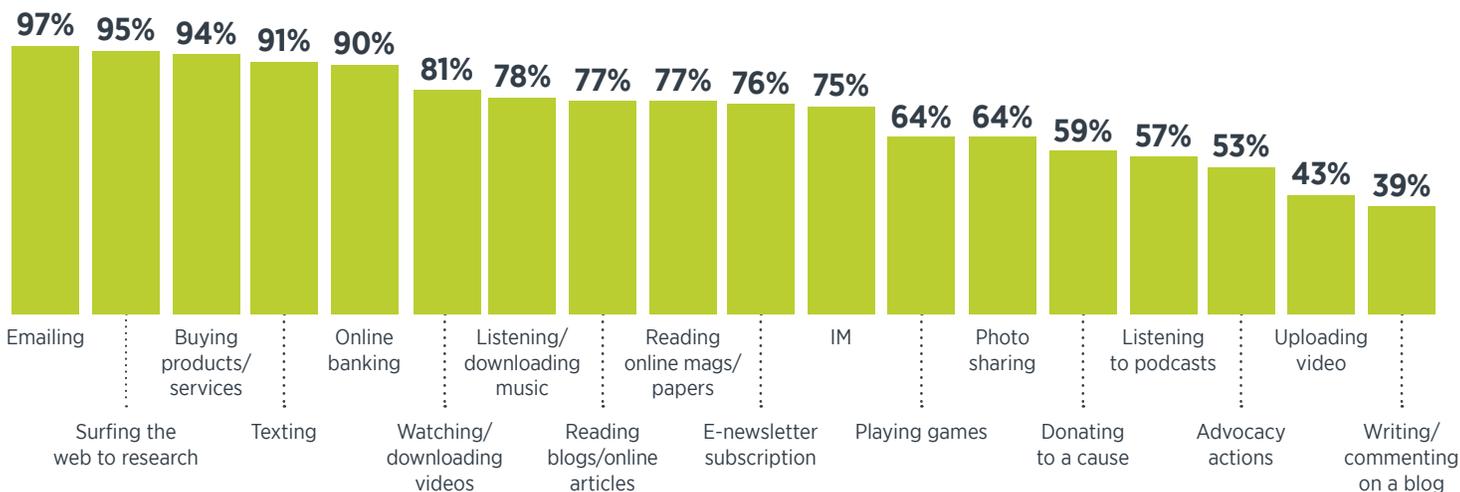


Figure 11: How often do you engage in the following activities online?

When we look specifically at digital member engagement, we see some interesting gaps between what members think professional membership organization offer and the ways members would like to connect (Figure 12). More members are interested in webinars, mobile apps, online video, and podcasts than what they believe their organizations are offering today.

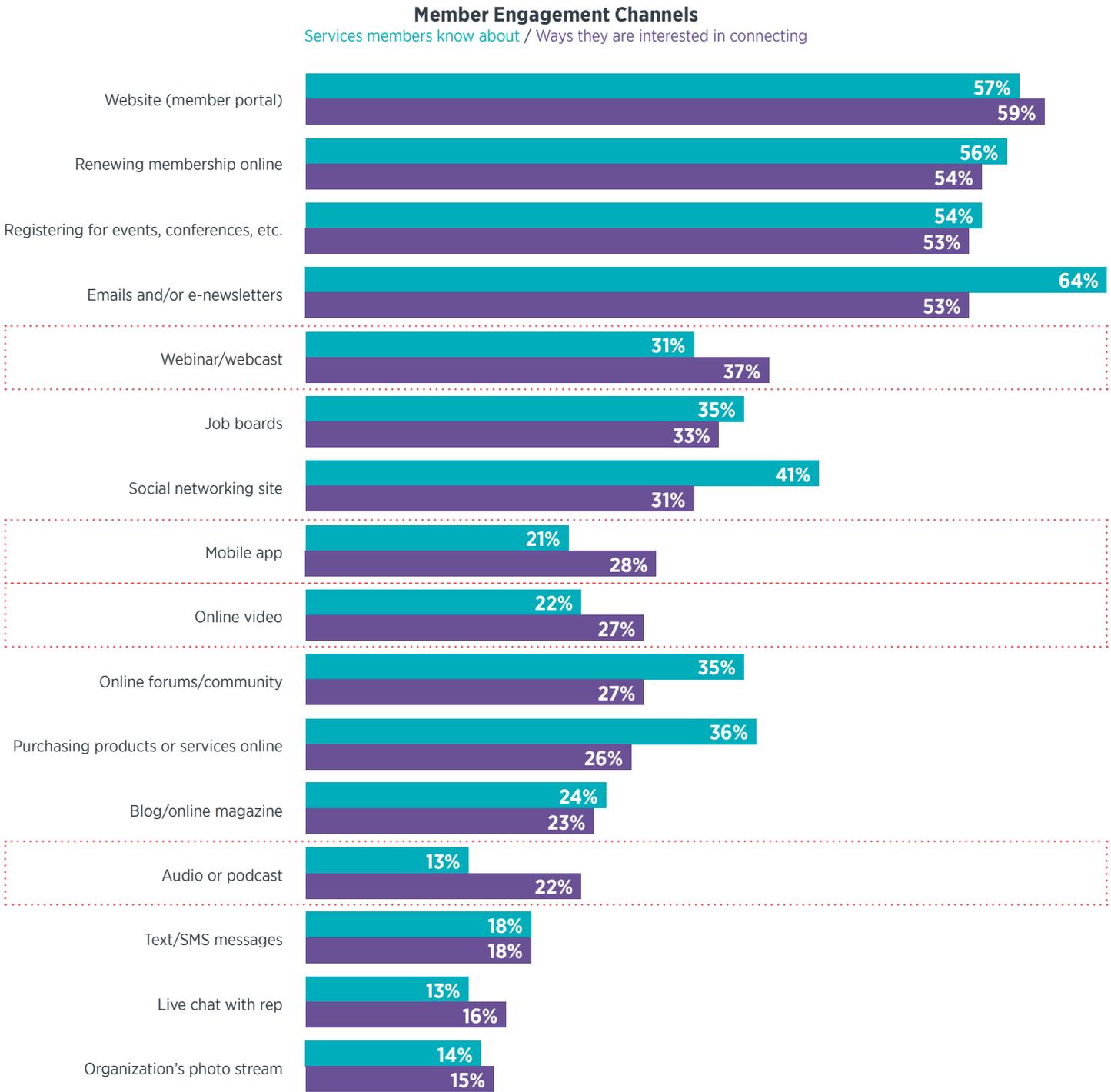


Figure 12: Which of the following online services are offered by your professional membership organization?/In which of the following ways are you interested in connecting with your professional membership organization online? (Select all that apply.)

Figure 13 highlights the gaps between how members are engaging and the devices through which they'd like to engage with their organization. We have not hit the tipping point with emerging devices, such as smart speakers and wearables, but there is a rising interest from members, especially early adopters.

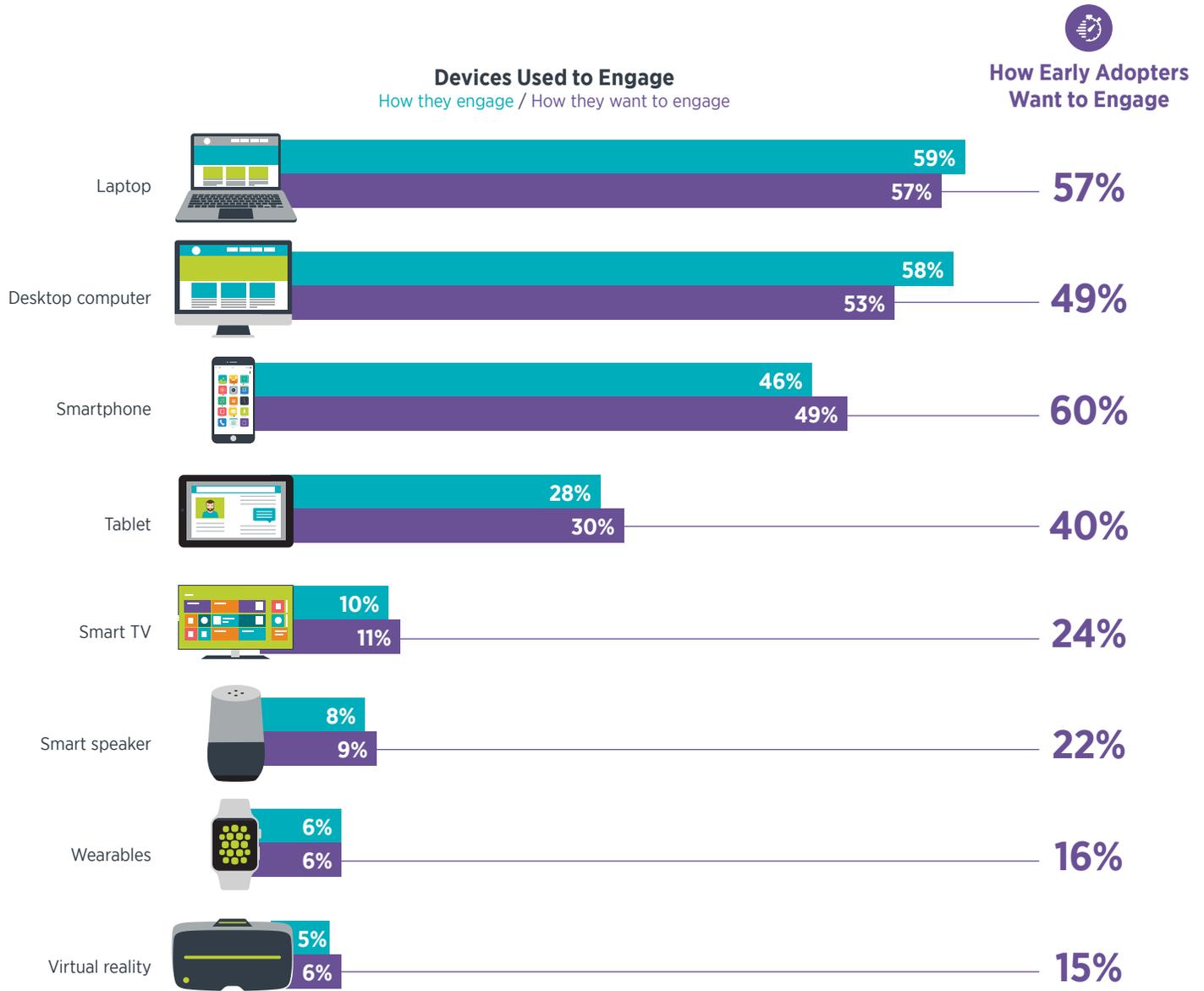


Figure 13: On which of the following devices do you/would you like to engage with your professional membership organization? (Select all that apply.)

PRO TIP !

Don't make assumptions about your members' tech savviness. Ask them! Conduct member surveys to better understand member digital behavior and how they would like to engage with your organization. It's important to tell them why you're collecting the information: to help create a better member experience that meets their expectations. Keep the information stored in your AMS to leverage for segmentation, based on channel preference and interests.

This study also examined the intersection of member satisfaction with their current digital experiences. **Figure 14** breaks down those experiences into tiers, based on the ratings from members. Currently, we see gaps between where members believe their organizations are performing best and the services and benefits they value most. Members give the highest ratings to their experiences when using technology to pay dues and register for continuing education events and courses. Experiences that received lower ratings include training opportunities, certifications, and advocacy outreach.

We know from the [2017 Member Loyalty Study](#) that many of the benefits and services ranked in the lower tiers are those that are most valued and important to retaining members. Those benefits have been starred in Figure 14. It's crucial that professional membership organizations take these experience gaps seriously and focus their technology strategies on improving areas that create the most value for members.



Figure 14: Here are some specific ways that professional membership organizations might use technology to connect and provide benefits and services to members. How would you rate your organization on each?

Special Section: Online Education

Forty-six percent of members surveyed have taken an online course or signed up for continuing education through their organization’s website. While the experience of registering for a course online is highly rated, current online training and certification experiences rank in the bottom tier according to members. **Figure 15** rates the aspects of online education offerings, and highlights specific areas where membership organizations can improve.

Rating Online Education Experiences (By Members)



Figure 15: Please rate the following aspects of your professional membership organization’s online education offerings.

Rating Online Education Offering (By Staff)



Figure 16: Please rate the following aspects of your organization’s online education offerings.

It’s worth noting that only 29 percent of organizations surveyed are currently using a learning management system (LMS). As we saw in the [Member Professional Development Study](#) earlier this year, a majority of professional membership organizations find it challenging to keep up to date with the latest learning-based technology. **Figure 16** shows the order in which membership organization staff rate an aspect of their online continuing education offering as excellent or very good. Again, we see personalization rated the lowest, along with virtual conferences and tracking credits.

PRO TIP!

By leveraging a learning management system (LMS), organizations can layer in personalized learning paths and course recommendations, based on member roles and/or audience profile information such as specialty, field of study, or career stage. . The key is a solid integration with your AMS (or other member database solution) that allows for a two-way flow of information as more data points are captured.

Section 3: Personalization Gap

Providing personalized experiences has become common practice in consumer business, offering tailored content and recommendations, based on data and past activity. Only a third of members believe their professional membership organization uses member-provided information and search data to show them things they might be interested in, make recommendations, and offer discounts for specific products and services. Like we saw with the correlation between member loyalty and technology, members who feel more satisfied and connected with their organization believe they received personalized content (**Figure 17**). Greater personalization has the potential to help close the gap between member expectations and dissatisfaction with their current experiences.

Nearly 70 percent of surveyed members are interested in receiving personalized content, such as recommended courses, events, jobs, discounts, etc., based on their past activity (**Figure 18**). Millennials and Gen Xers are especially interested in this sort of personalization.

Correlation Between Personalization and Member Loyalty



Figure 17: To the best of your knowledge, does your professional membership organization personalize the information you see and/or receive?

Views on Personalization (Members)

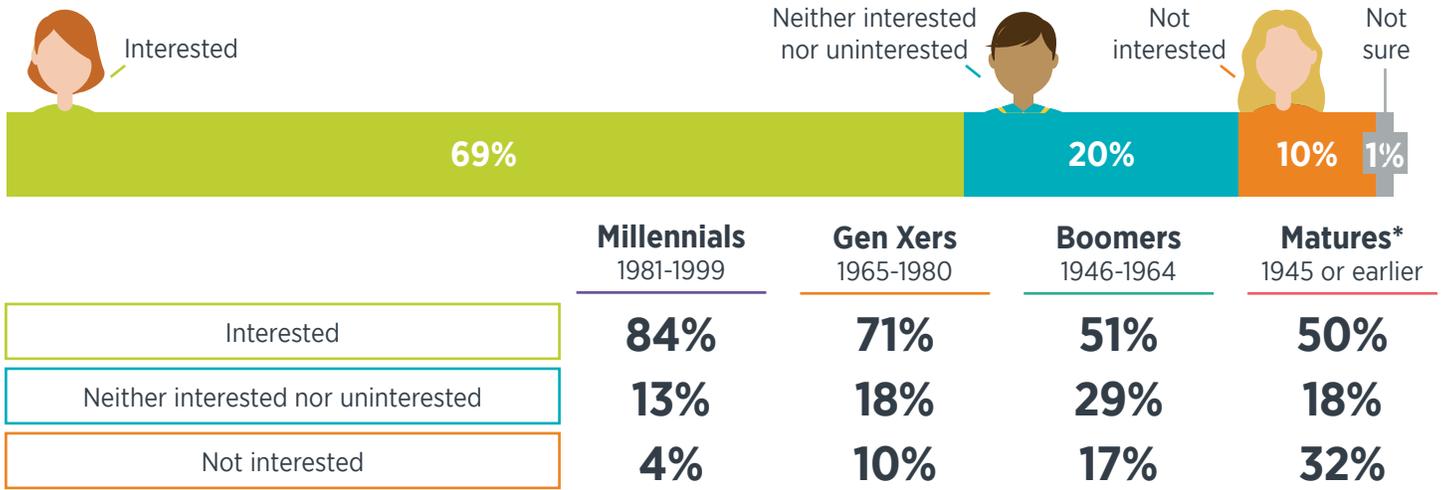


Figure 18: How interested are you in seeing and/or receiving personalized content and information from your professional membership organization (e.g. recommended courses, events, jobs, discounts, etc.), based on your past activity? (* small sample size)

A majority of members (69 percent) feel more engaged with an organization after receiving personalized content, based on their past activity, because it shows the organization is interested in meeting their needs. **Figure 19** digs deeper into the specific types of personalized content members are most interested in receiving. Members are most interested in personalized content on programs, continuing education, and relevant job postings.

Personalized Content Preferences (Rated by Members)

Would love / Wouldn't mind receiving

Millennial Members

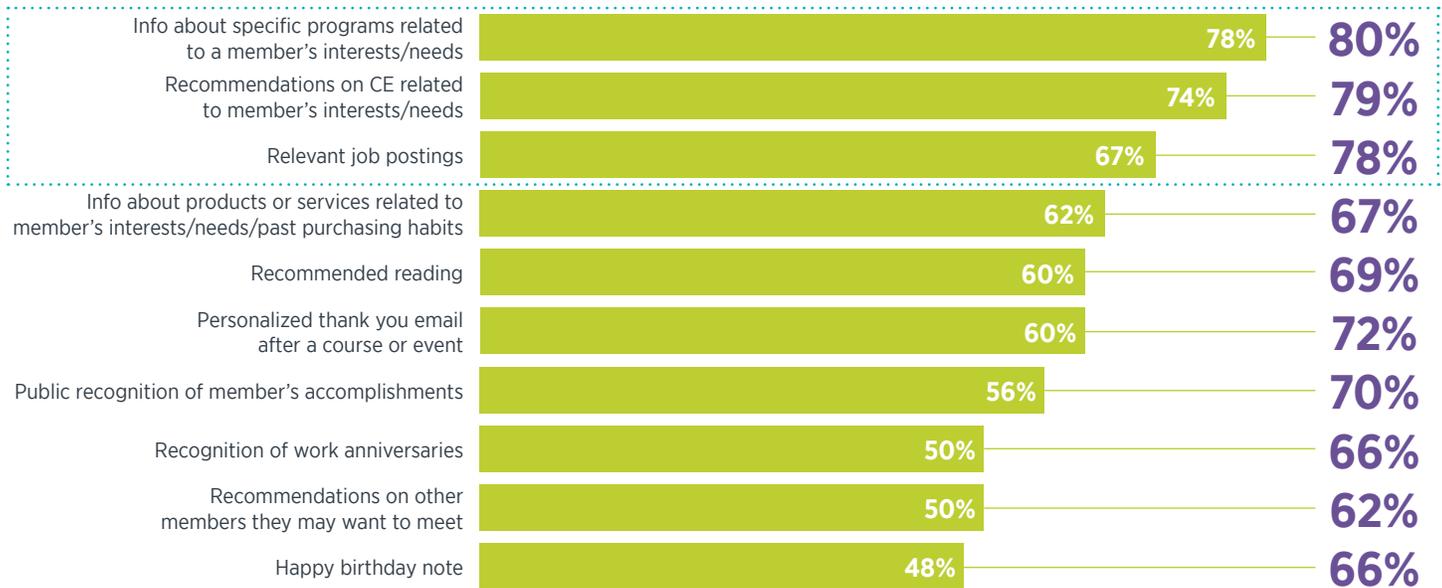


Figure 19: Which of the following best describes how you would feel if your professional membership organization were to reach out to you in each of the following ways?

PRO TIP !

Take your member experience to the next level by serving up recommended job postings, based on certification or CE course completion. Today's association job board technology can also suggest jobs, based on previous search history.

Staff at professional membership organizations are also interested in a solution that helps personalize information and content for members (Figure 20). A majority believe personalization makes members feel more engaged, but they don't understand the most valued types of personalized content. Figure 21 layers in the perspective of the professional membership organization staff about specific personalized content pieces. Organizations are more likely to think members want personalized acknowledgements; and they're missing the importance of personalized career development content, such as recommended job postings.

Views on a solution that personalizes information and content



Which comes closest to your view on personalization?



Figure 20: Views on personalization (organization staff)

Perceived Personalized Content Preferences

Members / Staff

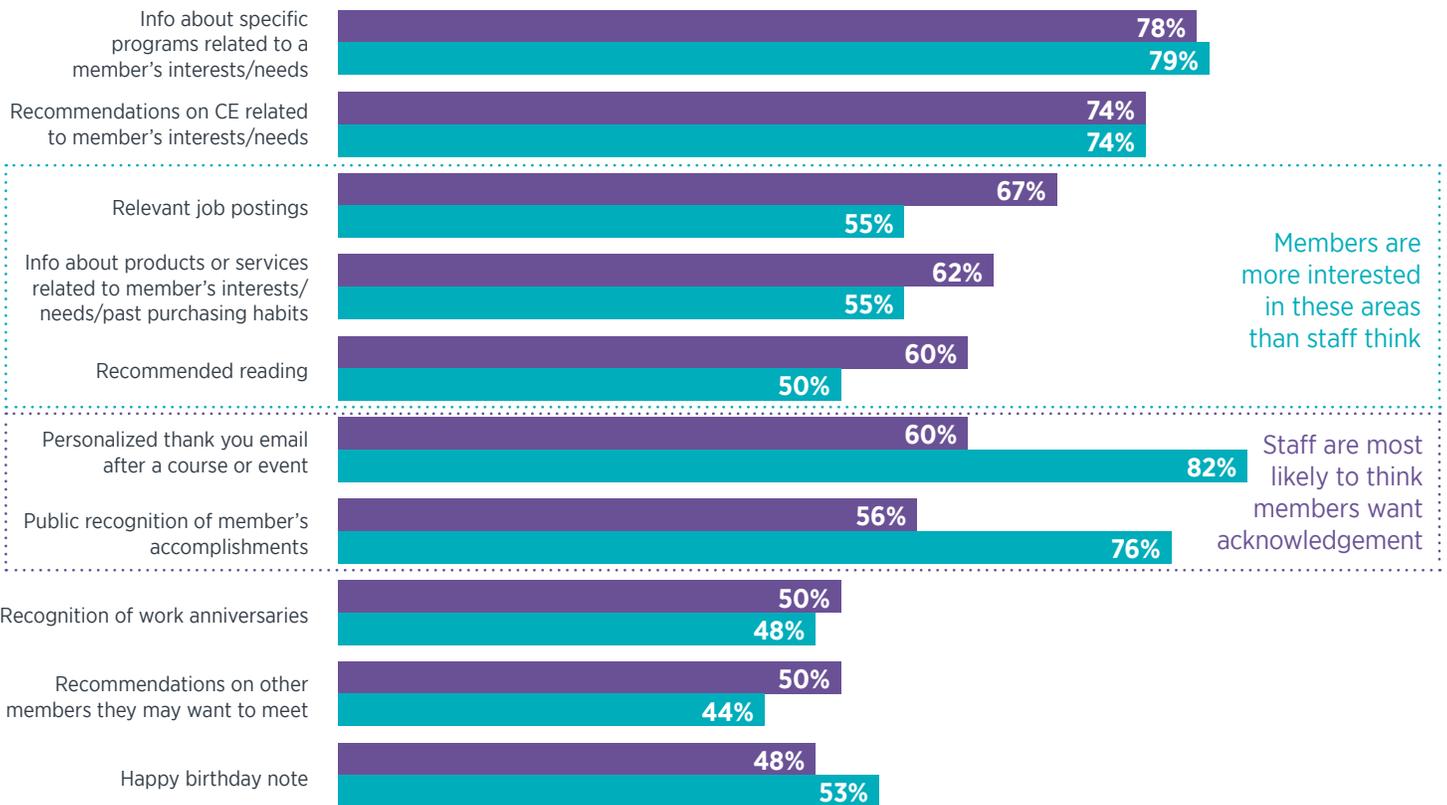


Figure 21: Which of the following best describes how you would feel if your professional membership organization were to reach out to you in each of the following ways?

Section 4: Preparing for the Future

Fifty-eight percent of surveyed professional membership staff don't feel their organization is technologically prepared to meet member expectations. Another 60 percent do not feel their organization is prepared for the future; however, only a quarter of professional membership organizations say they will heavily invest in new technology over the next 12 months (**Figure 22**). More than half say their investments will stay consistent or decrease, citing budget and leadership as barriers.

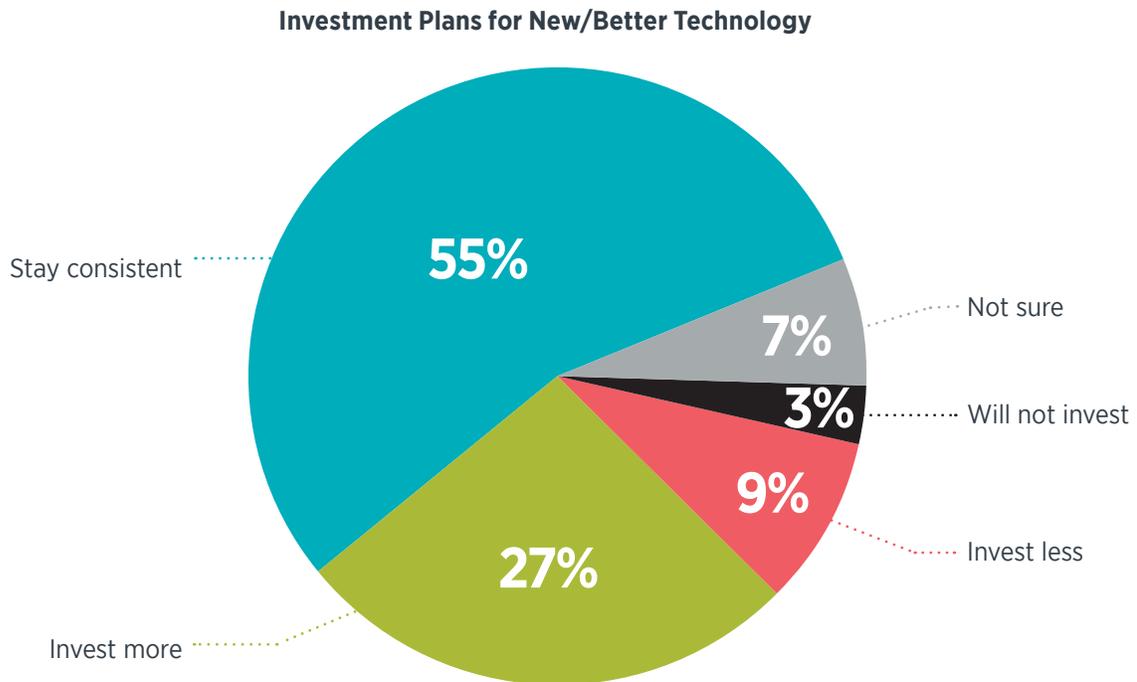


Figure 22: Which of the following best describes your organization's plans for the next 12 months with regards to technology?

Cost is the number one barrier impeding professional membership organizations from implementing new and better technology (**Figure 23**). Other top concerns include questions about return on investment (ROI), the ability to really impact the member experience, integrations, and member usage. There is less concern about internal abilities of staff.

Major Organization Concerns When Implementing New/Better Technology

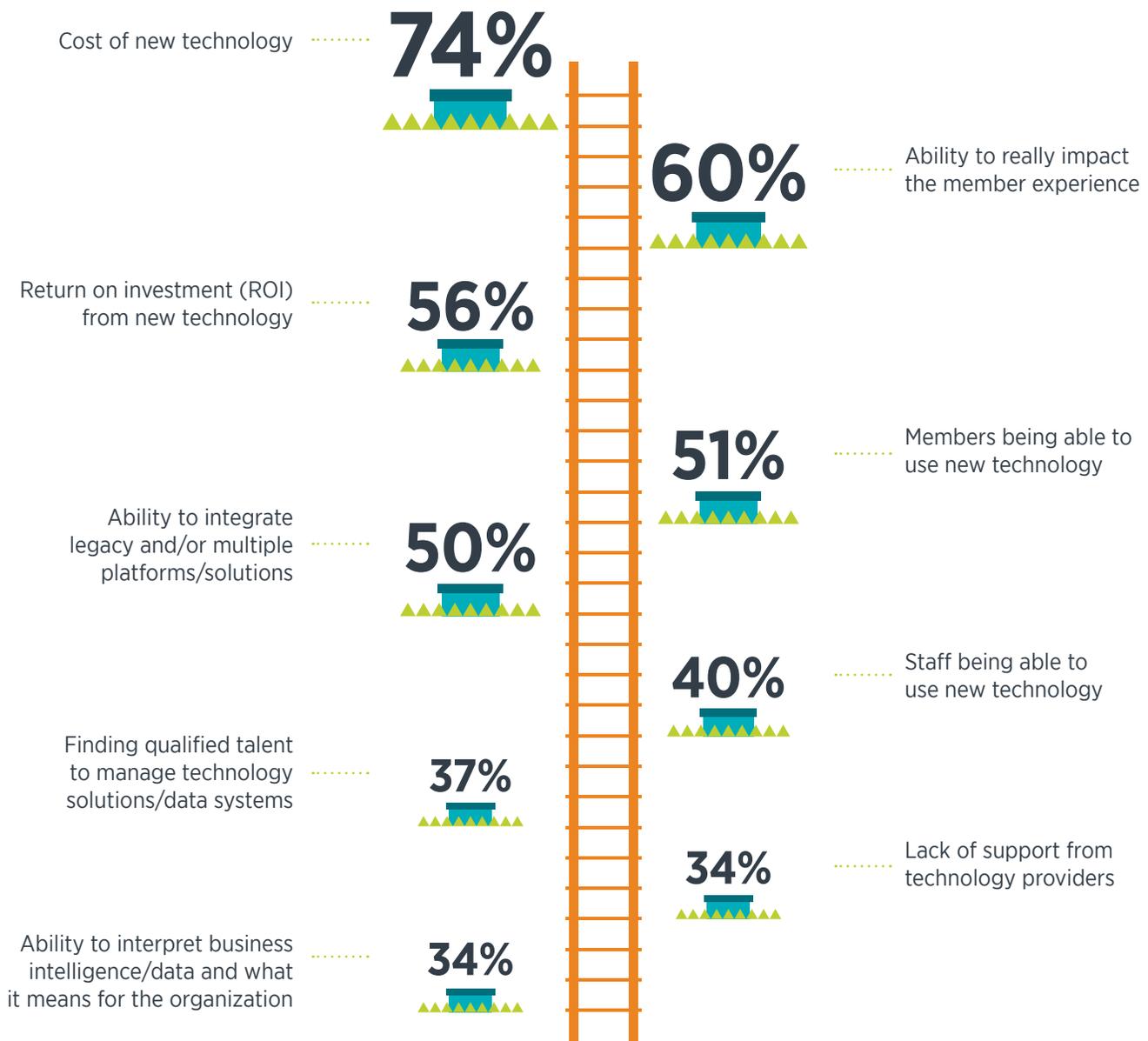


Figure 23: How much of a concern or issue is each of the following when it comes to implementing new or better technology?

Organizations that feel most prepared to meet the needs of members are more likely to use online communities, analytics/business intelligence tools, and advocacy systems (**Figure 24**). They are also more likely to invest in emerging technologies, such as artificial and predictive intelligence.

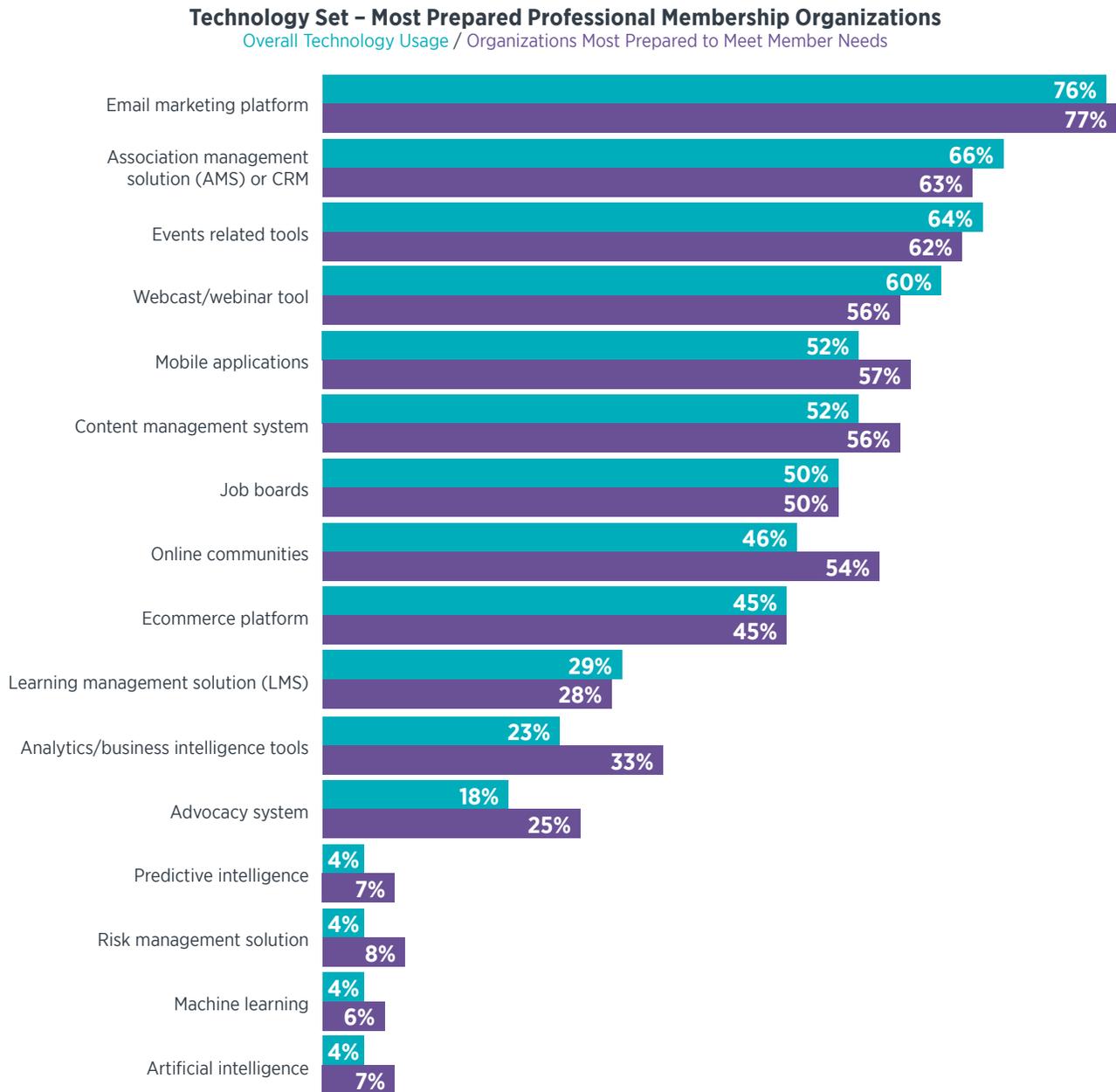


Figure 24: Which of the following technology/solutions does your organization use? (Select all that apply.)

PRO TIP !

It's important your organization's technology mix allows for easy flow of data between systems. Look for technology solutions that layer in predictive intelligence or machine learning, such as IFTTT logic (if this, then that) to serve up a more personalized, seamless experience automatically.

Emerging Technology Interests

While there is not currently a large portion of professional membership organizations (23 percent) using data analytics/business intelligence, nearly twice as many (49 percent) say this is a priority for the future (**Figure 25**). There is some concern about ability to interpret this information and what it means for the organization.

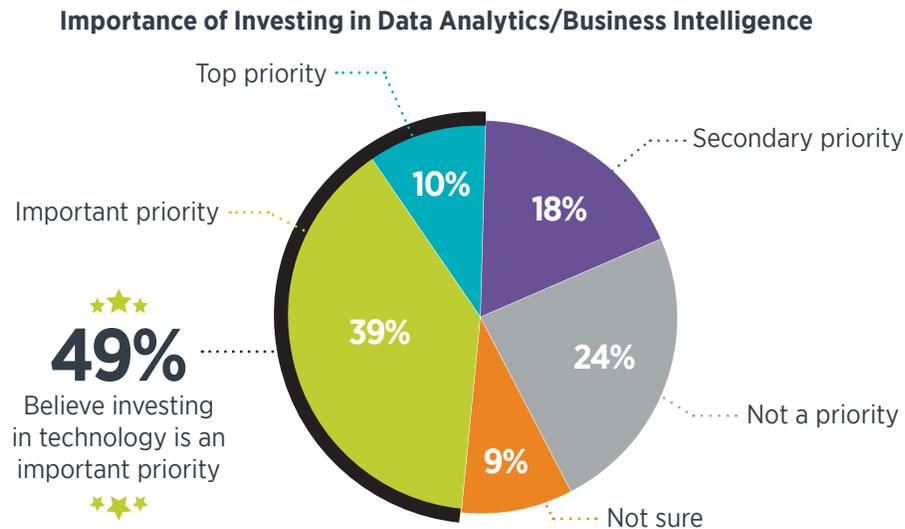


Figure 25: Some professional membership organizations are investing in and prioritizing business intelligence and data science/analytics. How important is this for your organization?

When asked what emerging technologies excite them the most, the largest percentage of membership organization staff cite accessing all their software from a mobile device or tablet (**Figure 26**). This is consistent with what we saw earlier in the study with the increasing member preference for access through mobile devices. Other technologies that excite organization staff include using machine learning to predict member behavior, and incorporating augmented reality to bring live events to members who cannot attend in person.

Emerging Technologies that Excite Organization Staff the Most

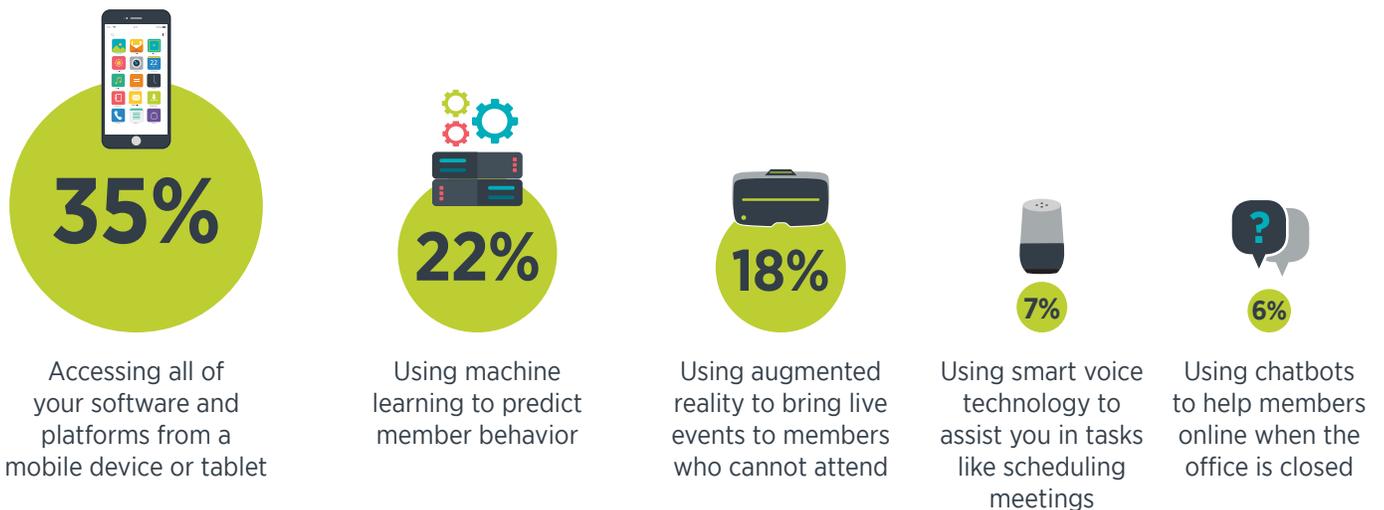


Figure 26: When it comes to new and emerging technology for your professional membership organization, what excites you the most?

Section 5: Recommendations

- **Map Out Current Member Experiences (and Identify Areas for Improvement).** Walk a virtual mile in your members' shoes by creating member journey maps. Journey maps tell the full story of being a member, and illustrate the member experience from their first interaction, to ongoing engagement, to (hopefully) a lifelong relationship. Members take different pathways throughout their membership lifecycle, and it's critical to fully understand each one. Leverage your members across different age groups and engagement levels to help map out their experiences. Identify gaps for improvement; you can start with the most common gaps in experience, including online training, certifications, and job opportunities.
- **Focus on Technology Strategies Tied Directly to What Members Value.** Choosing the right technology requires planning. Associations that use the right technology are giving members a more seamless user experience, because it's so natural and consistent with their everyday behavior. However, it's not just about incorporating the shiny new technology into your member experience. Organizations that are most prepared to meet their members' needs focus on leveraging technology to improve the digital experiences around the benefits most valued by members.
- **Invest in Mobile-First Technology – No Excuses!** Members expect to access your website and content with their mobile devices. And, to ensure a positive experience, it must be mobile responsive. With 83 percent of members using a smartphone daily, you can't afford to have them abandoning your website because it isn't responsive, and thus, too clunky to navigate. Mobile responsive design is not just for your association's website, but should also be implemented for delivering messages and content via email, online communities, and education courses. Design content for digital, mobile consumption rather than forcing printed content online.
- **Identify Opportunities to Add Personalization and Recommendations.** Personalization extends beyond member acknowledgement communications. Members understand that associations collect a lot of information about them; therefore, they expect to be presented with relevant content that aligns with their profile demographics, preferences, and furthering their professional career. But it doesn't just stop there. They also understand you're collecting data on their past activities and purchases. There is a rising expectation for relevant recommendations to be served up regarding additional courses, products, reading material, and even job opportunities, based on past behaviors.
- **Leverage Data Analytics and Business Intelligence.** More and more, organizations are realizing the importance of data analytics and business intelligence. The biggest concern is always your organization's ability to interpret it. It's important to prioritize your data strategy, based on the core objectives of the organization and the areas you're looking to improve. Are you collecting actionable data that will allow you to make strategic decisions and provide a more seamless, personalized member experience? Is that data being presented in a way that's easy to consume and use? Start with an inventory of all available data, and a plan to centralize and clean up the data for easy consumption.
- **Prepare for the Future with Early Adopter Members.** If you find your organization is struggling to stay ahead of the curve with evolving technology, turn to your early adopter members to help keep a pulse on shifting expectations and preferences. Incorporate member surveying and focus groups in your technology planning to gain insights into changing member needs before it's too late. Since early adopters are the first to embrace new technology, they can provide a roadmap for where member behavior and expectations are heading.

Survey Methodology

Commissioned by Community Brands, Edge Research conducted an online survey of 1,032 association members in the U.S. who self-reported they are currently a member of a professional membership organization. We also surveyed 410 association professionals who work at professional membership organizations and are involved in making decisions about how their organization uses technology.

For the member online survey, Edge Research engaged with a reputable, large opt-in panel in which survey exposure is monitored and limited. Survey respondents were recruited through an online non-probability sample, meaning findings are not generalizable to the larger population of members and professionals. Quotas were set, so the member survey was representative by key demographics. For the professional survey, Edge Research used a combination of commercial panel and Community Brands lists. The surveys were fielded October 18 to 30, 2017.

About Community Brands

Community Brands is a technology-driven company that delivers purpose-built solutions for more than 17,000 of the world's leading associations, nonprofits, and government entities to thrive and succeed in today's fast-paced, evolving world. Our focus on accelerating innovation and bringing to market modern technology solutions helps power social impact, effect positive change, and create opportunity. With Community Brands software and services, organizations better engage their members, donors and volunteers; raise more money; effectively manage revenue; and provide professional development and insights to power their missions.

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