

2013 Association Marketing Trendswatch

An executive summary of the trends that shape the marketing practices of association professionals, as reported by the Marketing Section Council of ASAE: The Center for Association Leadership.

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Introduction

BACKGROUND

The ASAE Marketing Section Council helps guide the activities, products and services ASAE offers to marketing professionals serving associations.

In 2012, the Marketing Section Council released its first-ever Marketing Trendswatch Survey to identify, test and report on the latest marketing trends affecting association professionals. The survey, summarized in the 2012 Marketing Trendswatch Report is now an annual report released by the Council.

METHODOLOGY

A virtual focus group was conducted in mid-January 2013 using ASAE's Collaborate site. Over a two-hour period, participants provided feedback on current trends they were experiencing and thoughts on the trends identified in the 2012 survey. Sixteen individuals participated in the virtual event.

The quantitative survey was informed by last year's survey and the focus group results. Data was collected between March and April 2013. The survey link was posted online on the ASAE Collaborate website and Marketing, Membership and Communication members received the survey link by email. Council members also invited specific colleagues with marketing responsibilities in the association community to respond. Due to the limited reach of the survey, the data may not represent the entire association marketing sector.

The survey closed on May 10, 2013, with a total of 115 responses, a 74% increase over last year's Trendswatch Survey response, providing us with valuable insight about the trends among the organizations represented by ASAE colleagues.

RESPONDENTS

More than 79% of respondents are director level or above. Seventy-eight percent of respondents listed affiliation with the marketing section. Respondents represent a wide range of association budget sizes, from less than \$100,000 to more than \$25 million. A majority of respondents (79%) reported their association budget to be greater than \$1 million. The top five industries represented are: healthcare (29%), non-profit (18%), education (12%), financial services (4%) and technology/internet (3%).

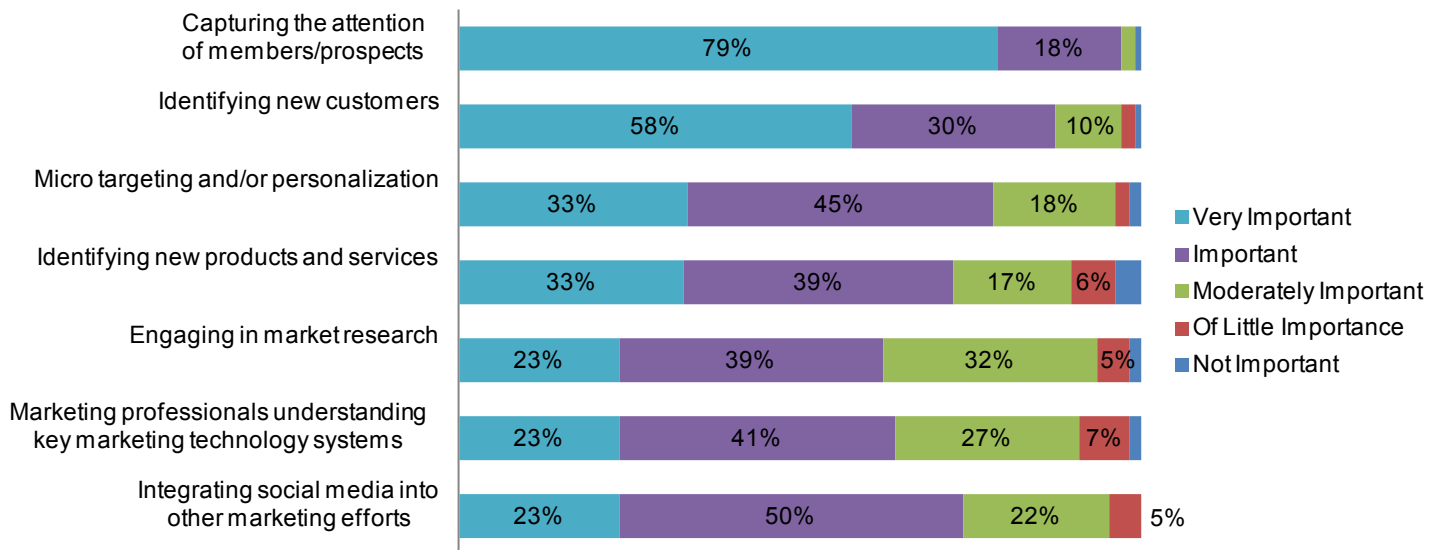
Trends and Survey Results

According to the most recent trends survey, more than 60% of association professionals surveyed ranked the following as “important” or “very important” trends impacting their work. The trends are presented in order of importance as ranked by survey respondents.

TABLE 1

Please rate the trends impacting association marketing professionals listed below in terms of their importance.

Total Responses: 112



Trend #1

Capturing the Attention of Members

Once again, “capturing the attention of our members and prospects” is the top trend among association marketing professionals with 97% responding that it was either “important” or “very important.” This is not surprising given the increase in the number of items and services competing for members personal and professional attention everyday through an ever-increasing variety of channels.

The importance of “cutting through the clutter” to capture the attention of members was a significant item in the virtual focus group as well. Individuals spoke to the importance of coordinating different channels and the right messaging as key to capturing attention. Many were moving away from the traditional “marketing pitch” and incorporating a more authentic tone to their messages while ensuring they are short and to the point.

While the quantitative survey did not dig deeply into specific findings related to capturing attention, the importance of developing appropriate messaging for social media, the use of multiple social media channels, expanding budgets and development of social media plans, all speak to the increased efforts and challenges associations face in capturing the attention of members and prospects.

In the virtual focus group, one attendee noted that as they use more channels to distribute their messaging, their audience is almost segmenting itself. The association sees differing demographics for Facebook, e-newsletters and mail pieces and is working to take advantage of this natural segmentation. It was felt that segmenting and message tailoring were critical in the face of so much information through so many channels.

Trend #2

Identifying New Customers and Identifying New Products and Services

Not surprisingly, identifying new business—both in terms of new customers and products/services—ranks high as a trend. Eighty-eight percent of survey respondents rated new customers as either “very important” or “important.” Seventy-two percent of survey respondents rated identifying new products and services as “very important” and “important.” As many associations’ traditional revenue streams are challenged, the importance of revenue diversification and the expansion of customer bases is key to survival and growth.

Trend #3

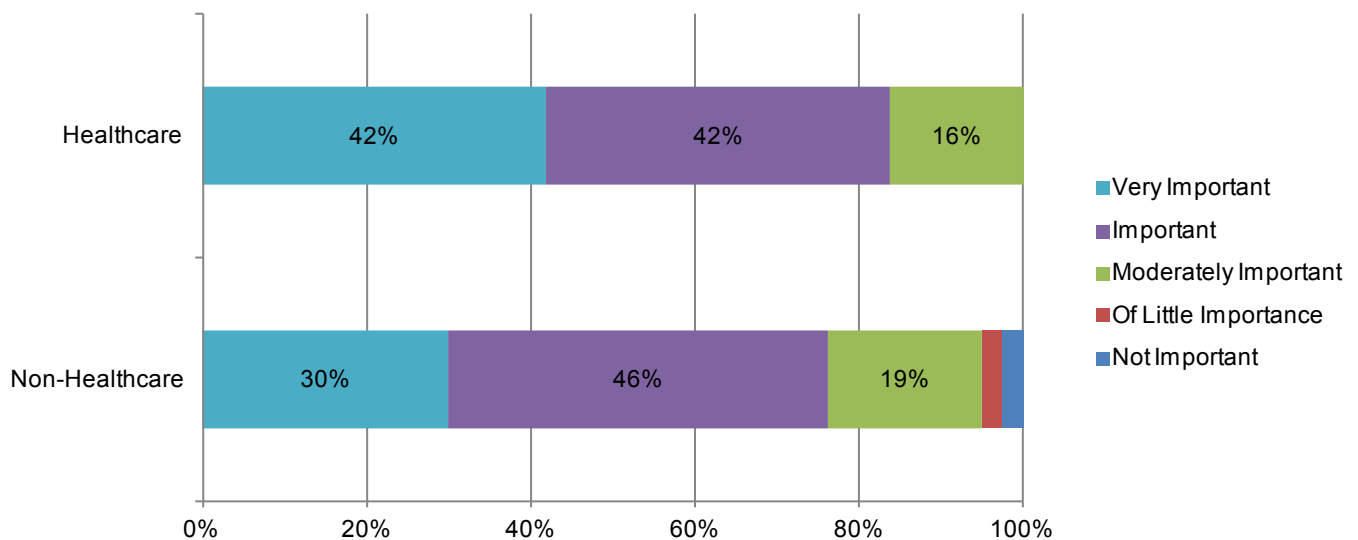
Micro targeting and/or Personalization

Many organizations are rethinking how they send out and target communications. As indicated by the survey data, the trend of micro targeting and personalizing marketing and communications efforts is considered “important” or “very important” by 78% of respondents. We found that healthcare-related associations (42%) are more likely to find this trend “very important” versus 30% of non-healthcare associations rating micro targeting and personalization as “very important.” Half of those who found the concept of applying “Big Data” “extremely important” (see Table 5) rated micro targeting and personalization as “very important.” Associations are realizing that taking a targeted and segmented approach to marketing is important in appealing to members and customers.

TABLE 2

Please rate the importance of the trend of micro targeting and/or personalization impact on association marketing professionals.

Total Responses: 112



Trend #4

Engaging in Market Research

Overall, market research is a highly important trend impacting associations with 62% of respondents rating it as an “important” or “very important” trend. Associations are investing more marketing dollars into research with 32% increasing their budgets and 60% of respondents keeping their budgets the same. The survey also found that approximately half of associations are conducting a form of market research (surveys, focus groups and/or other forms of opinion research) at least once a year and 12% of respondents’ organizations are conducting research six or more times a year. What does this mean for associations? Many associations recognize the importance of research as a way to give members, customers and potential markets a voice, answer questions and provide solutions. Research can be a valuable tool in making strategic decisions and better delivering member value. For instance, applying “Big Data” to marketing and communications efforts continues to grow in complexity and scope. Of survey respondents, 53% reported that applying “Big Data” to marketing and communications efforts is “important” or “extremely important” to their association.

TABLE 3

How do you expect your marketing budget to change in the next year for market research?

Total Responses: 114

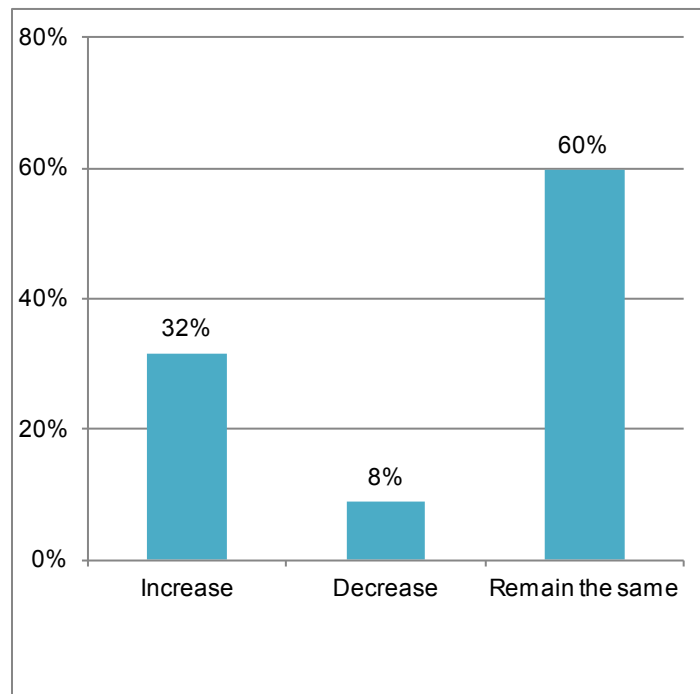


TABLE 4

How often does your association conduct marketing research (surveys, focus groups and/or other forms of opinion research)?

Total Responses: 114

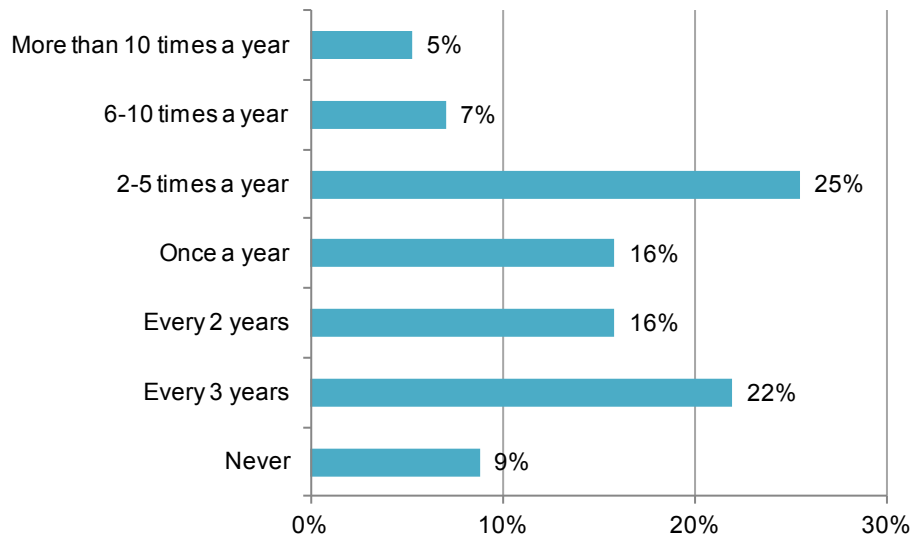
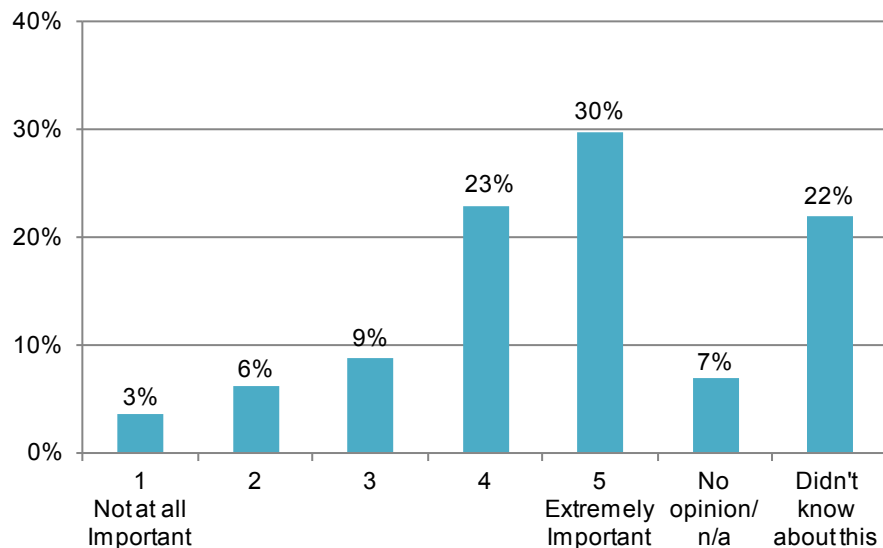


TABLE 5

The concept of applying “Big Data” to Marketing/Communications efforts continues to grow in complexity and scope. Do you see the analysis of “Big Data” as important to your marketing communications efforts and/or organizational efforts?

Total Responses: 102



Trend #5

Marketing Professionals Understanding Key Marketing Technology Systems

Understanding marketing technology systems is still an important trend impacting marketing professionals with 64% of respondents indicating that it is either “important” or “very important.” Marketing technology systems refer to association management systems, content management systems, email marketing systems and others. Understanding marketing technology systems can lead to profound changes in how we reach, attract, engage and retain customers and can provide a roadmap for opportunity-mining, leveraging cross-channels and measurement of marketing programs.

Some of the key systems that surfaced in the virtual focus group were email systems and systems that facilitate increased personalization. The importance of marketing and IT working together to use data better was also stressed.

Trend #6

Integrating Social Media into Other Marketing Efforts

Almost 74% of those surveyed ranked ‘integrating social media into their marketing efforts’ as “important” or “very important.” This helps to explain why social media was ranked as the second highest budget priority (at 48%), second only to print marketing (53%), for survey respondents.

In the virtual focus group it was acknowledged that social media is key to an integrated marketing strategy. However, it is important to use the channels that best fit your membership’s learning styles and personal preferences, not because they are the latest “it” thing.

More than 69% of respondents indicated a ‘partially implemented’ social media strategy, as compared to 59% last year. On the flip side, 20% reported a ‘fully implemented’ media strategy, down from last year’s findings of 26%.

TABLE 6

How do you expect your marketing budget to change in the next year?

Total Responses: 114

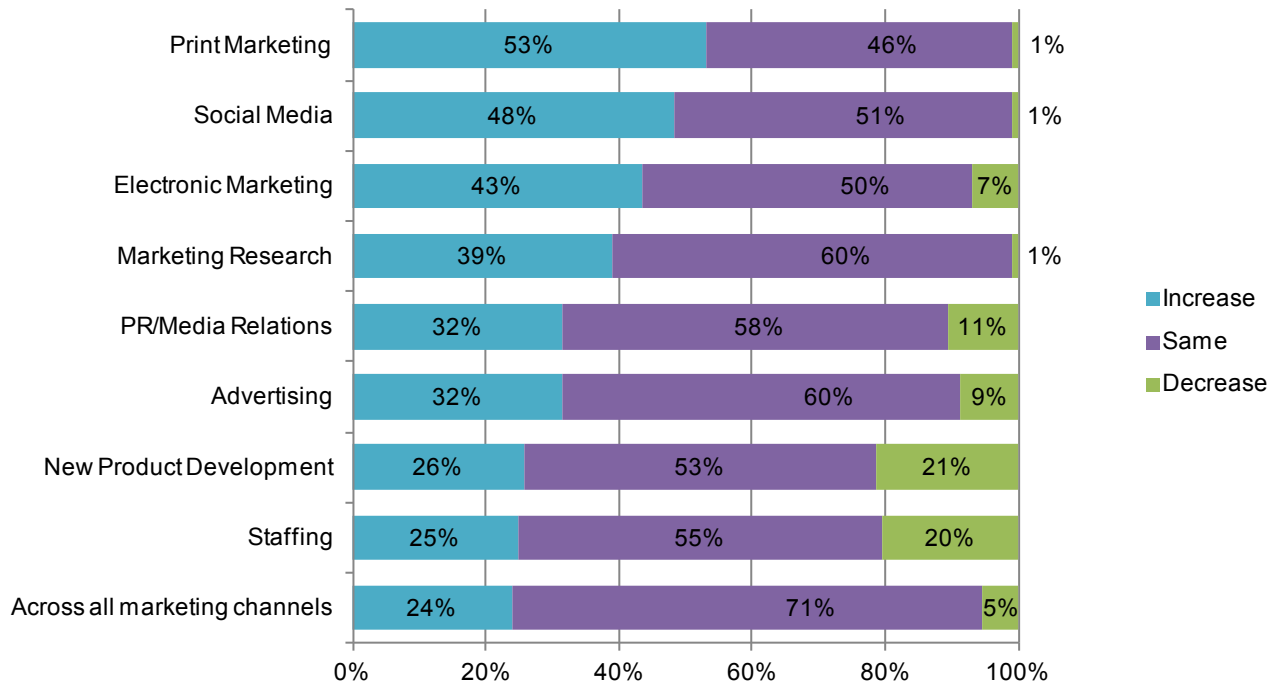
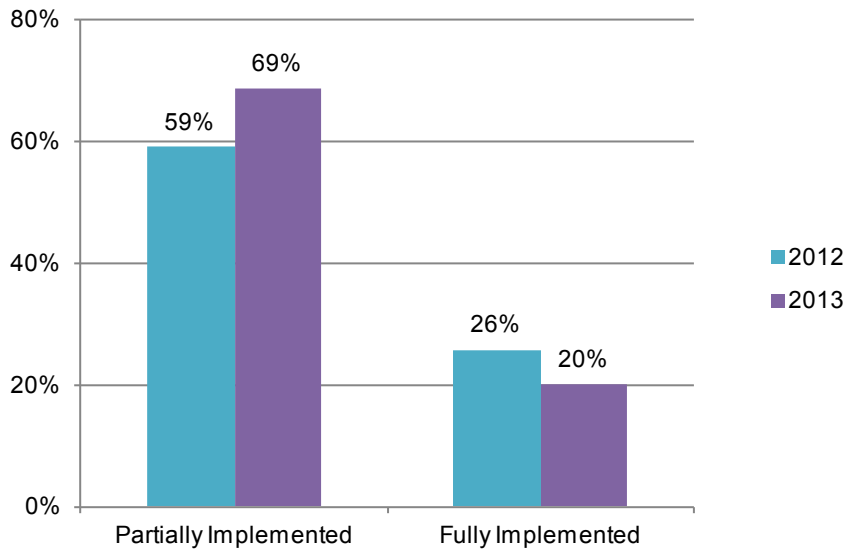


TABLE 7

Has your association integrated social media into your marketing efforts (specifically using social media to market your association’s programs, products and events)?

Total Responses: 2013: 115
2012: 66

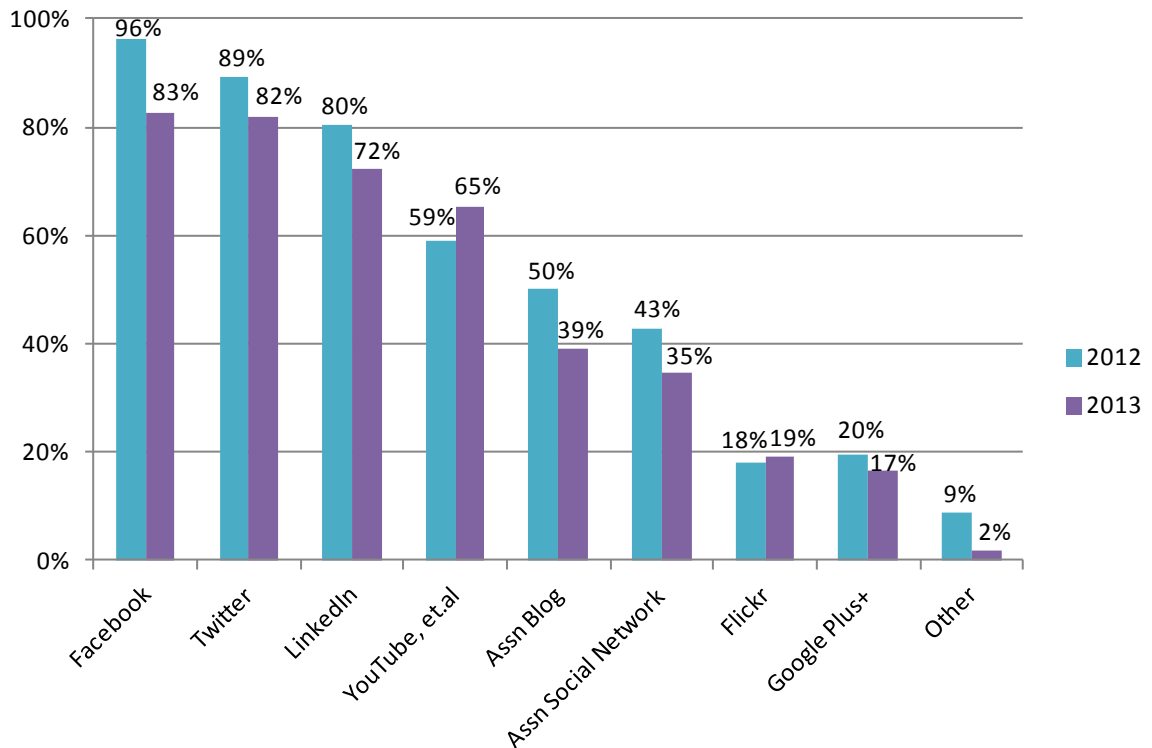


One possible explanation for the shift is the ever-evolving nature of social media. As social media continues to transform how we live and do business the line between fully implemented and partially implemented may continue to blur. The chart below compares the social media tools (and their level of use) year over year as reported in the 2012 and 2013 Trendswatch Survey.

TABLE 8

Please indicate which social media tools you are currently using to market your association’s programs, products and events and which channel is the most important for your marketing strategy.

Total Responses: 2013: 115
2012: 56



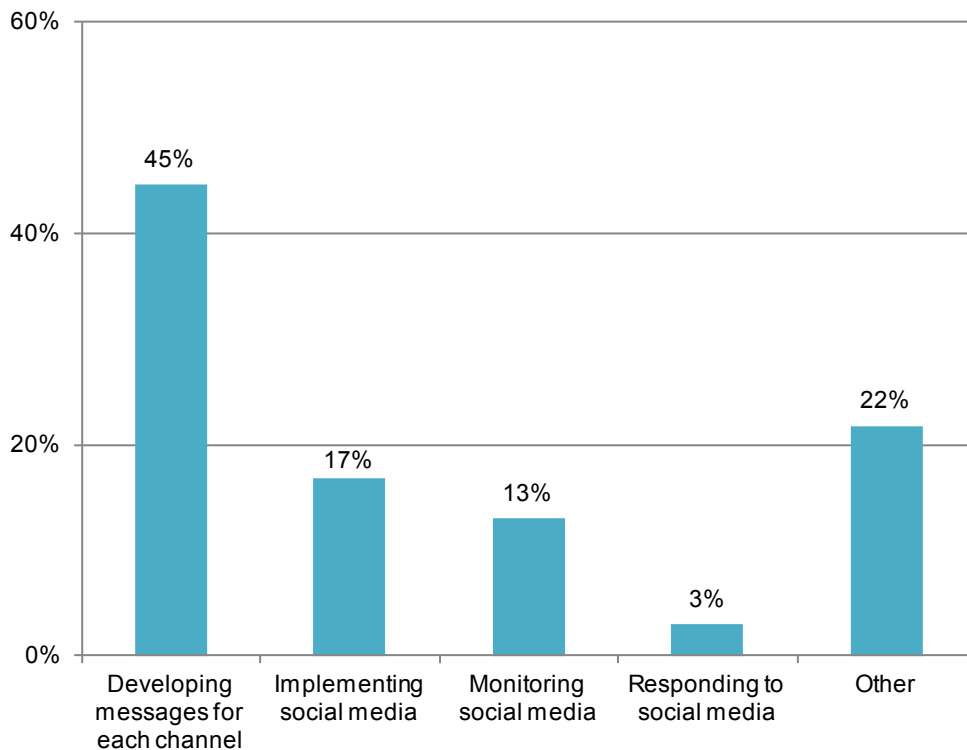
In a shift from last year's survey when 47% of respondents indicated that marketing had chief responsibility for social media, this year's survey indicates a shared responsibility between marketing and communications emerging, with 34% indicating marketing and 37% indicating communications holds responsibility for these channels. A possible explanation may be the continued challenge of message development.

Forty-five percent of respondents indicated developing the right message with the right tone continues to be a challenge when it comes to social media implementation.

TABLE 9

What is your biggest challenge using social media in your marketing efforts?

Total Responses: 101



Marketing Structures/Use of Consultants

This year's survey explored several issues that are not related to trends but are important in understanding how associations accomplish the marketing function within their organizations.

Almost half of respondents (46%) reported that their association has a centralized marketing function, while just over one-third (37%) have a partially centralized marketing function. The survey illustrated the following results when looking to see if the organization of an association's marketing function correlates to the use of an outside marketing firm. Seventy-two percent of respondents with a centralized marketing function do not use an outside marketing firm, whereas 85% of respondents with a de-centralized marketing function do not use an outside marketing firm. And 67% of those with partially centralized and partially de-centralized marketing functions do not use an outside marketing firm. The data indicates that associations with de-centralized marketing functions are less likely to hire outside marketing firms.

TABLE 10

How is your association's marketing organization structured?

Total Responses: 114

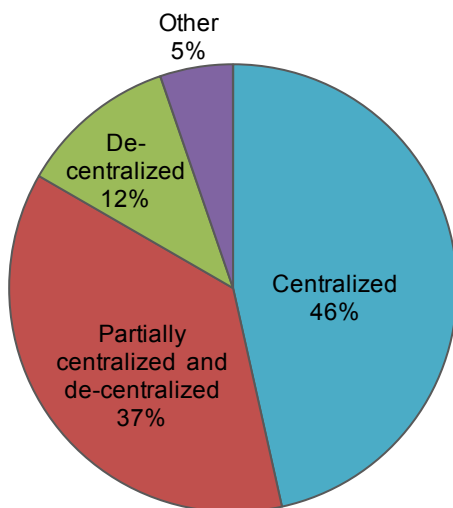


TABLE 11

Does your association use an outsourced marketing firm?

Total Responses: 114

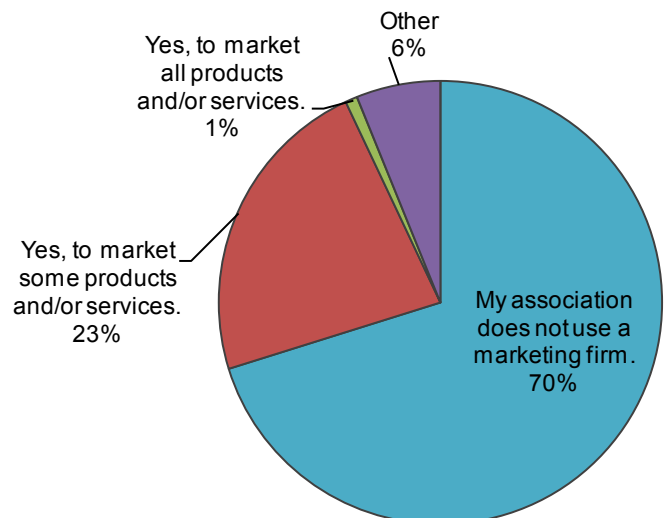
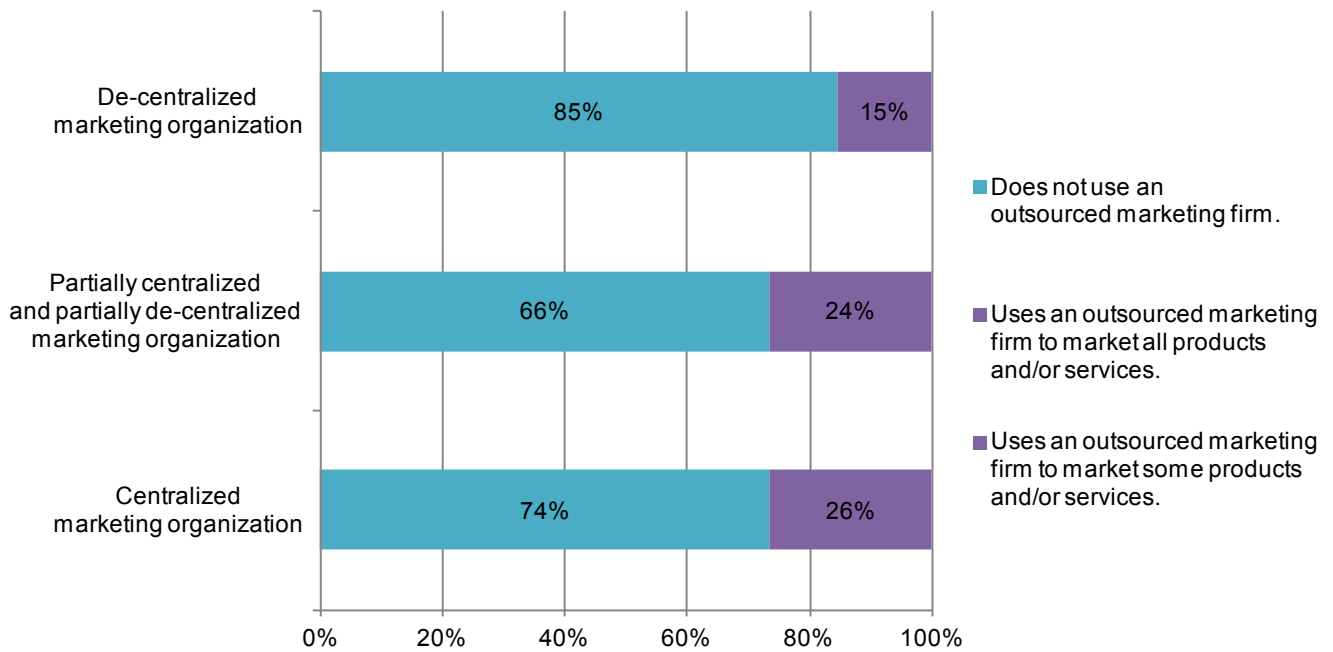


TABLE 12

Marketing Structures / Use of Outside Marketing Firms

Total Responses: 102



Conclusion

Today’s association marketing professionals face a number of challenges in reaching and finding their members and customers. The increased use of technology and number of channels, such as social media, make it even more important than ever before for the marketing professional to remain aware and understand the latest trends. Interestingly, the top trends from the last survey —going global, increased competition and earning trust— did not surface as the top trends this year. This helps to illustrate the fast-changing environment that we all work in today. What is popular one day, may not be popular the next!

Meet the Council

The Marketing Section Council is a group of thought leaders in association marketing who assist ASAE staff in providing activities, products and services for ASAE's professional interest section for marketing professionals with the goal of enhancing their work and the work of the associations they represent.

The Council, appointed by the chair of ASAE, is made up of a mix of mid- and senior-level association executives, consultants and industry partners who demonstrate mastery of the marketing discipline and diversity of experience in terms of the types of associations they work for and with.

2012-2013 COUNCIL MEMBERS

The following council members contributed to this report.

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