



**Association Impact & Policy Snapshot – February/March
4/14/2021**

(ASAE External) Baseline Final Report (All Questions Shown)

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The data in this report are final.

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Methodology

This third phase of the Association Impact Survey continues to assess the impact of COVID-19 on association business operations. An updated policy and advocacy section (Section 6) was included in this third phase. This phase is particularly significant because it has been one year since the beginning of the COVID-19 pandemic. As such, the online survey was framed as a look back (2020) and a look forward (2021 and beyond).

This survey was conducted on February 22, 2021 through March 19, 2021 via Alchemer, ASAE's web-based survey software. A total of three contacts, an invite and two reminders were made during the field period. This third phase was completed in one data collection fielding period, which differs from the weekly drops of the first two phases, thus the results shall present one set of data, not weekly snapshots.

A total of n=3,127 email invitations were sent out to:

- ASAE Member-Assn Professionals with
- position level: Association CEO/ Executive Director
- job titles: Executive Director, President and/or CEO
- primary job functions: Executive Management/Strategy/Governance; Chief Staff Officer; Operations and Administration; Convention, Expositions, and Meeting Planning; Finance, Human Resources; Marketing; and Technology.
 - Government Relations (GR) and Public Policy job functions responded to Sections 6 - 7.

This study's full sample was sourced from ASAE's Membership Database. Position level, job title, and primary job function are all self-reported fields.

A total of 265 completed responses (201 CEOs & 64 GR) were received for a response rate of 8.47%.

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Executive Summary

Challenges and Opportunities

Association leaders' top challenges in 2021 continue to be related to managing the financial aspects of their organizations resulting from the impact of COVID-19. Leaders identified driving new ways to engage members, shaping the direction on diversity, equality, and inclusion and organizational culture, and developing new ways to partner as their top opportunities in 2021.

- **Challenges (in descending order of popularity):** COVID-19 and its impact on managing non-dues (#1) and dues-driven (#2) revenue streams; engagement with members to drive retention / acquisition (#3); thinking beyond 2021 for long range planning, management, strategy, governance (#4); and managing impact of COVID on my organization's P/L, (#5).
- **Opportunities (in descending order of popularity):** To engage with members in new/creative ways (#1); to do something different in non-dues-related activities (#2); to shape my organization's future direction on diversity, equity, and inclusion (#3); to shift/shape new organizational culture #4; and to develop new relationships/ecosystem/new ways to partner (#5).

Association leaders also used an open-ended response option to share additional top-of-mind challenges and opportunities.

The Future of Meetings

- Leaders expect their associations to provide in-person, face-to-face conferences/expos/events in Q3/Q4 of 2021 for smaller meetings and in Q1/Q2 of 2022 for larger meetings. (Quarters reporting in calendar year) The continuation of virtual aspects and/or hybrid aspects of meetings along with in-person face-to-face, suggests an increasing comfort level with adapting multiple delivery channels per event.
- The top factors influencing the decision to return to face-to-face are the take-up of the vaccine in the United States, attendees' organizations lifting their travel bans, and guidance from state, local, and national officials.
- Nearly one in 10 (7.4%) associations have already resumed business travel. The majority (58.8%) of associations plan to resume business travel in the third and fourth quarters of 2021. This data is seen as an approximation for resumption of conference travel.

Return to the Office

Leaders identified their expectations to return their organizations to a physical office space in the following proportions:

- Half (51.3%) of organizations plan to return to the office at some point over the next two years.
- Among those who have returned, nearly two in five organizations either partially (18.3%) or fully (18.3%) returned to their physical office space, with one in 10 not having physical office space.
- Among those who haven't returned to the office, three in five (58.8%) plan to return in Q3 of 2021 with (86.7% returning in Q3-2021 or later).

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The report is divided into seven sections:

- [Section 1: Challenges and Opportunities for 2021](#)
- [Section 2: Conferences, Expos and Events](#)
- [Section 3: Member Needs and Engagement](#)
- [Section 4: Staff and Work Policies](#)
- [Section 5: Organizational Culture](#)
- [Section 6: Demographics](#)
- [Section 7: Appendix](#)

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Section 1: Challenges and Opportunities for 2021

Q: What are your organization’s greatest challenges and/or opportunities in 2021 during this ongoing global health crisis? Please be as specific as possible. (*n=varies*)

Challenges (n=184)



Opportunities (n=178)



Top mentions: Challenges: member, staff, membership, revenue, meet
Opportunities: new, member, virtual, more, meet














For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.


Q: From the list below, please rank order (up to 5) your organization’s Overall Top Five Challenges in 2021 during this global health crisis. If your organization's top five challenge is not listed below, please use the comment box to add additional challenges.

The top ranked challenge for organizations was managing the COVID-19 impact on non-dues driven revenue streams, followed by managing the COVID-19 impact on dues driven revenue streams. The third ranked challenge was how to engage with members to drive retention and acquisition. The fourth ranked challenge revolves around planning and strategy beyond 2021, and lastly, rounding out the top five is the management of the COVID-19 impact on organizations profit/loss finances.

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Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Managing impact of COVID on non-dues-driven revenue streams (e.g., loss of programs)	1		460	112
Managing impact of COVID on dues-driven revenue streams (e.g., membership)	2		435	110
Engagement with members (i.e., to drive retention, acquisition)	3		318	103
Thinking beyond 2021 for long-range planning, management, strategy, governance, etc.	4		317	130
Managing impact of COVID on my organization's overall P/L finances	5		255	74
Migrating to virtual technology for association products/services	6		178	60
Engagement with industry partners (e.g., to solidify relationships)	7		176	64
Managing staff engagement (e.g., culture, DE&I)	8		161	60
Managing impact of COVID on expense budgets (e.g., salaries, benefits)	9		143	49
Migrating to virtual technology for staff	10		106	32
Soliciting of donations (e.g., fundraising)	11		75	27
Tapping into my organization's reserves/endowment	12		61	26
Managing staff levels (i.e., staff reduction, etc.)	13		60	24
Managing staff work policies in light of global health crisis	14		54	22
Other, please specify in comment box.	15		39	16


 Lowest Rank Highest Rank

*See Appendix for definitions of Overall Rank, Rank Distribution, Score and No. of Rankings

Other Responses (n=19)

Top mentions: n is too small

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Q: From the list below, please rank order (up to 5) your organization’s Overall Top Five Opportunities in 2021 during this global health crisis. If your organization's top five opportunity is not listed below, please use the comment box to add additional challenges.

The top five opportunities listed by organizations revolve around updating the ways organizations work as well as refocusing on diversity, equality, and inclusion. The top rank opportunity is to engage with members in new/creative ways. The second ranked opportunity is to do something different with non-dues related activities. The third highest rank opportunity is to shape the organizations future direction on diversity, equity, and inclusion. The fourth and fifth ranked opportunities revolve around re-shaping organizational culture and to build new relationships and/or partnerships.

Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Opportunity to engage with members in new/creative ways	1		511	152
Opportunity to do something different in non-dues-related activities	2		495	129
Opportunity to shape my organization's future direction on Diversity, Equity, and Inclusion	3		315	89
Opportunity to shift/shape new organizational culture	4		272	84
Opportunity to develop new relationships/ecosystem/new ways to partner	5		256	99
Opportunity to do something different in dues-related activities	6		255	69
Opportunity to rethink the physical office space	7		245	82
Opportunity to craft new/different policies and procedures	8		145	54
Opportunity to build new data-driven decision platforms	9		133	47
Opportunity for new/different hiring programs, policies, sourcing of talent nationally/globally	10		55	21
Opportunity to source talent (e.g., gig employees/gig economy)	11		50	22
Other, please specify in comment box.	12		14	7

Lowest Rank Highest Rank

*See Appendix for definitions of Overall Rank, Rank Distribution, Score and No. of Rankings

Other Responses (n=9)

Top mentions: n is too small

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Section 2: Conferences, Expos, and Events

C,E&E - A look back at 2020

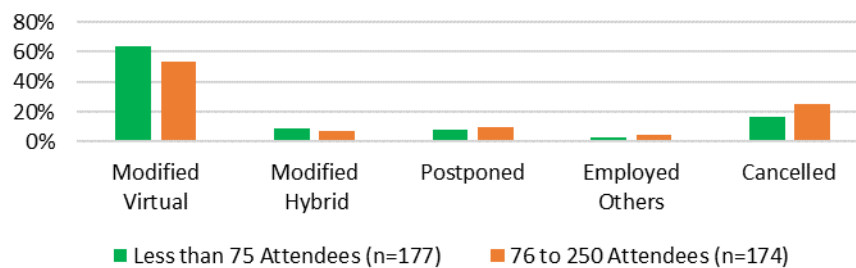
Q: How have your organization's Face-to-Face conferences/expos/events been affected in 2020?

The majority (51% or more) of organizations on average modified their Face-to-Face conference/expos/events to virtual events. The second most event was to cancel, then postpone events.

Smaller Meetings

Total Counts			
Less than 75 attendees		76 to 250 attendees	
Total responses	186	Total responses	188
N/A_No Events	9 (4.8%)	N/A_No Events	14 (7.4%)

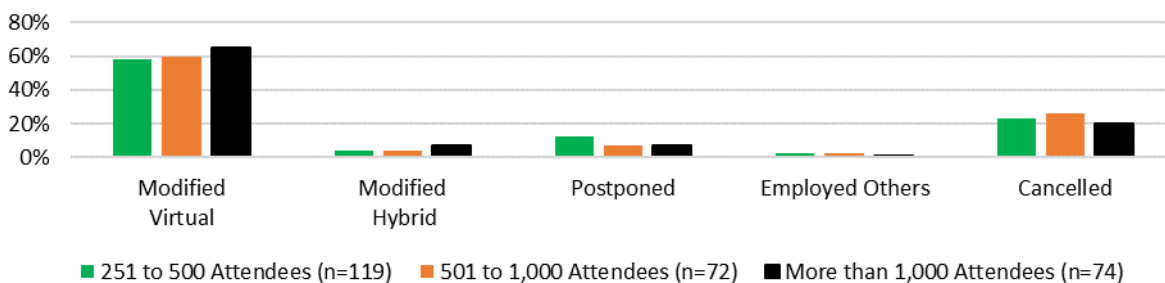
F2F Meeting Changes



Larger Meetings

Total Counts					
251 to 500 attendees		501 to 1,000 attendees		More than 1,000 attendees	
Total responses	155	Total responses	125	Total responses	131
N/A_No Events	36 (23.2%)	N/A_No Events	53 (42.4%)	N/A_No Events	57 (43.5%)

F2F Meeting Changes



(Omitted: Small n's for all fill-in responses)

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Other Responses (n=4)

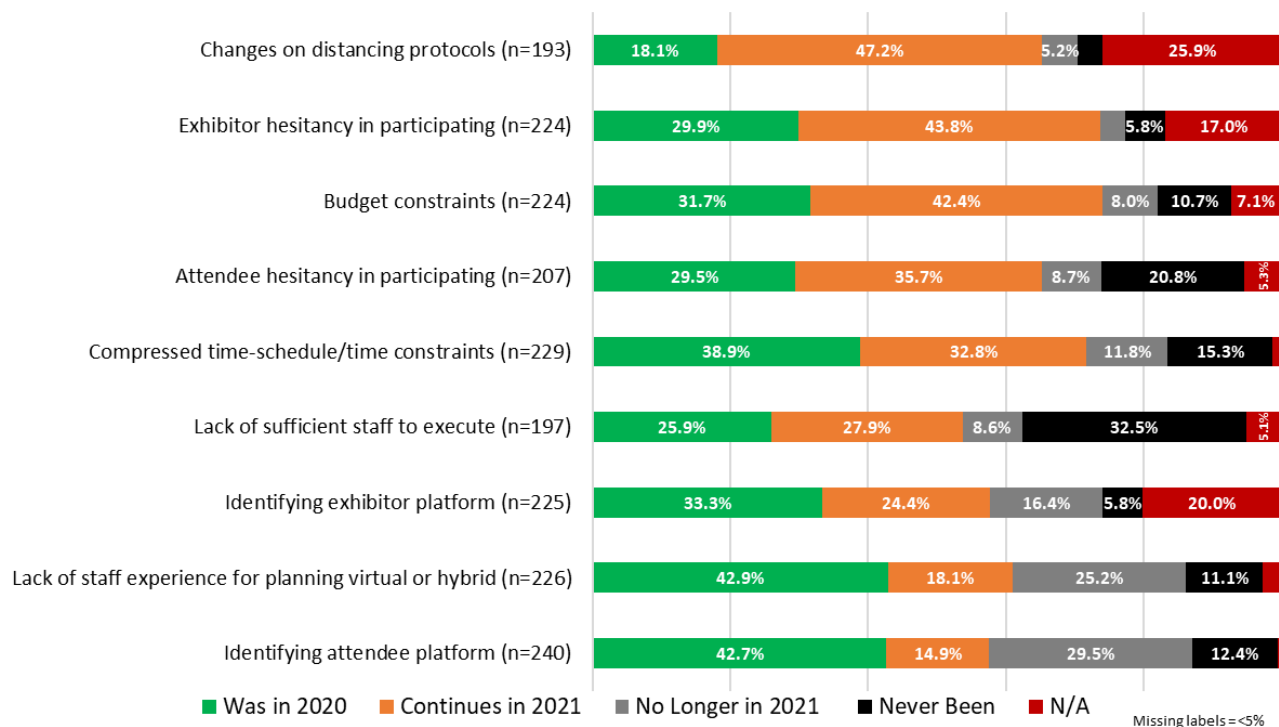
Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: When your organization modified your Face-to-Face event(s) to virtual or hybrid in 2020, which of the following challenges did your organization have to manage?

Nearly half (47.2%) of organizations continue (in 2021) to have challenges with changes in distancing protocols and (43.8%) have continued to have issues with exhibitor hesitancy in participating and (42.4%) with budget constraints. Finding exhibitor platforms are still more challenging in 2021 rather than finding attendee platforms.

Challenges with Virtual or Hybrid Meetings in 2020 (Sorted by "Continues to be a Challenge in 2021")



(Omitted: Small n's for all fill-in responses)

Other Responses (n=6)

Top mentions: n is too small

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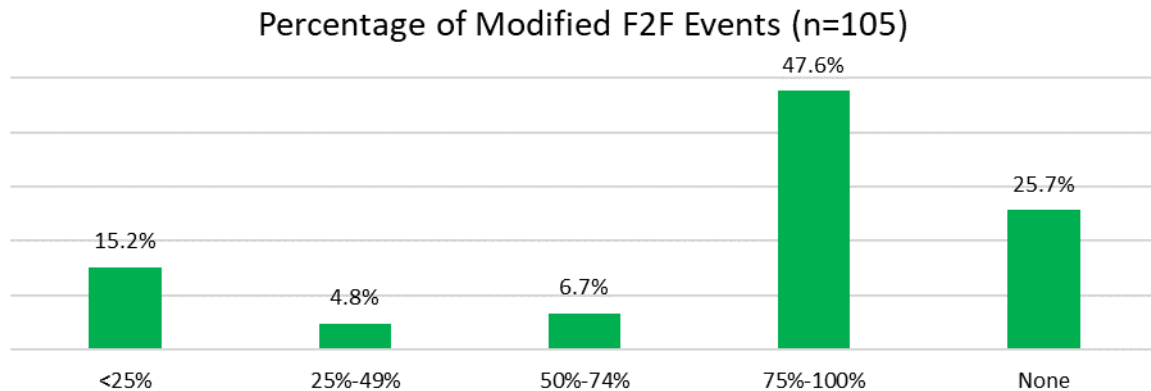
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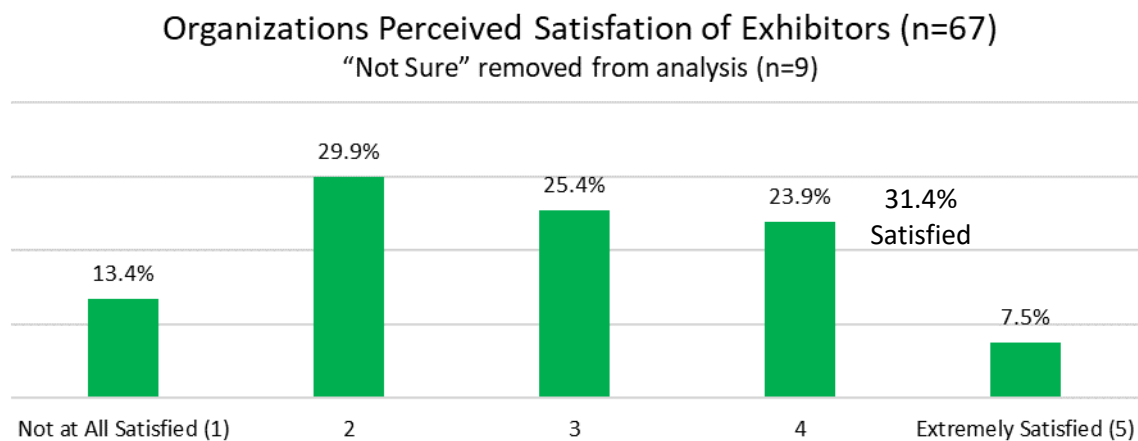
Q: What percentage of your Face-to-Face events that were modified to virtual or hybrid included a virtual exhibit hall in 2020?

Nearly half (47.6%) of organizations reported that 75% or more of their meetings included a virtual exhibit hall. One-quarter (25.7%) of organizations reported that “none” of their events included a virtual exhibit hall.



Q: How satisfied have exhibitors been with your organization's virtual exhibiting experience?

Nearly one-third (31.4%) of organizations perceive exhibitors to be “satisfied” with their virtual exhibiting experience.



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Q: How will your organization move forward with conferences/expos/events in 2021 (e.g., number of events, nature of events changing from what was established last year, reorganizing/outsourcing meeting planning, etc.)? (n=179)



Top mentions: virtual, event, person, meet, conference

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

C,E&E - A look towards 2021

Q: From the list below, once Face-to-Face returns, how will your organization move forward with conferences/expos/events in 2021?

Small meetings (less than 250 attendees) are more likely to continue virtually than return to face to face in 2021. For larger meetings (more than 250 attendees), the trend suggests the desire to return to a face-to-face implementation in 2021. Although for meetings of 500 to 1,000 attendees the trend is to continue with virtual meetings. For meeting larger than 1,000 attendees, the desire is again to return to face-to-face meetings. Additionally, as meeting attendance increases in size especially for larger meetings (250 attendees and up) the likelihood to continue “Hybrid” meeting models increases.

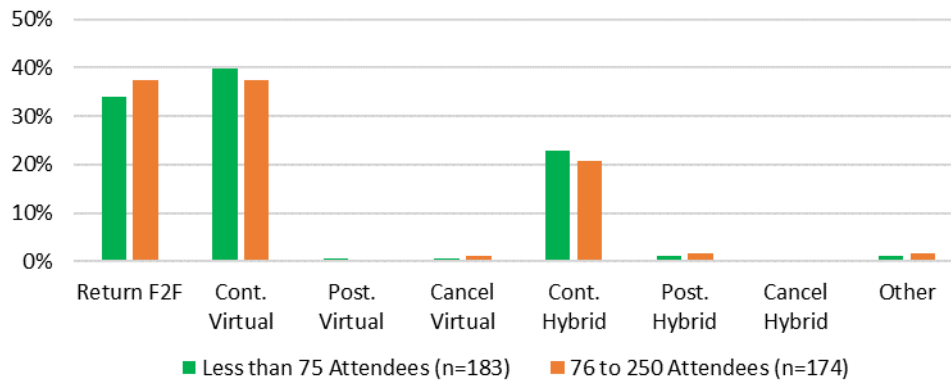
Smaller Meetings

Total Counts			
Less than 75 attendees		76 to 250 attendees	
Total responses	204	Total responses	197
Not sure	13 (6.4%)	Not sure	9 (4.6%)
N/A_No Events	87 (3.9%)	N/A_No Events	14 (7.1%)

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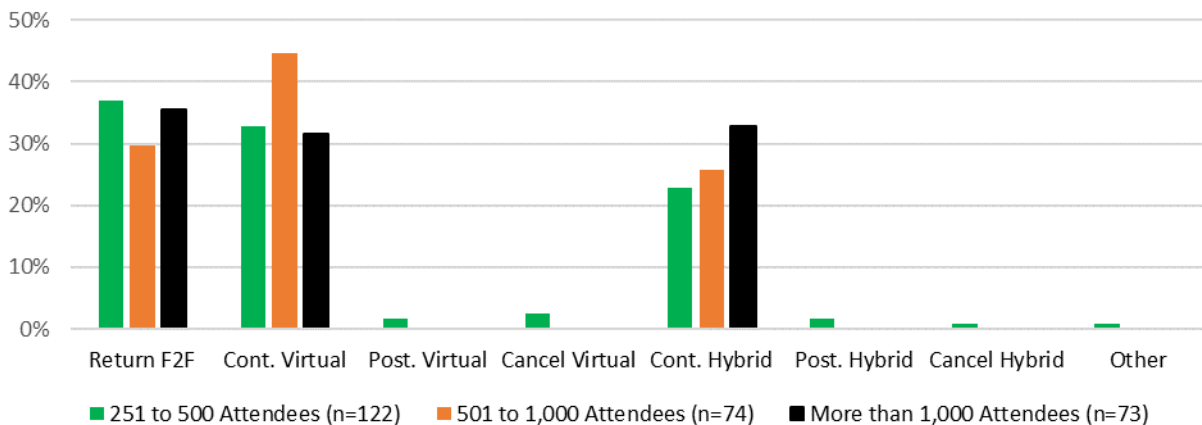
Organization Future Plans



Larger Meetings

Total Counts					
251 to 500 attendees		501 to 1,000 attendees		More than 1,000 attendees	
Total responses	167	Total responses	137	Total responses	146
Not sure	9 (5.4%)	Not sure	7 (5.1%)	Not sure	6 (4.1%)
N/A_No Events	36 (21.6%)	N/A_No Events	56 (40.9%)	N/A_No Events	67 (45.9%)

Organization Future Plans



(Omitted: Small n's for all fill-in responses)

Other Responses (n=4)

Top mentions: n is too small

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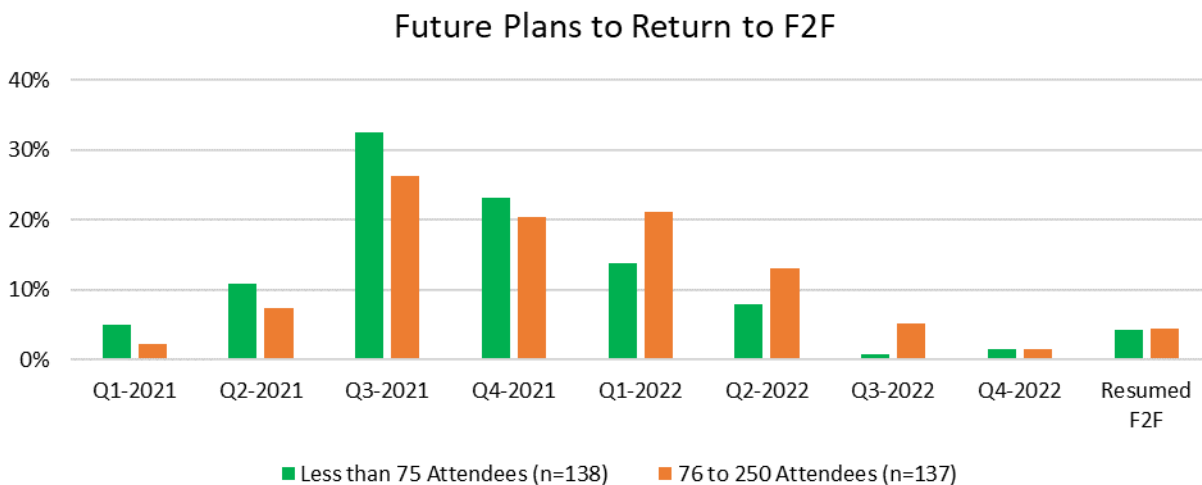
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Q: When is the earliest your organization anticipates resuming events of the sizes below where all or the majority of attendees would be in-person (e.g., Face-to-Face)?

For smaller meetings (Less than 250 attendees) the goal is to resume events in the third & fourth quarters in 2021. For larger meetings this is pushed back a quarter or two to the fourth quarter of 2021 and the first and second quarters of 2022. Larger meetings are taking more of a wait and see approach when compared to the smaller meetings. When mapped with the previous question’s data, the most cautious group is still the 500 to 1,000 attendee meeting. They propose continuing virtual and as well as not returning to face to face meetings as quickly as similarly sized meetings (250 to 500 & More than 1,000).

Smaller Meetings

Total Counts			
Less than 75 attendees		76 to 250 attendees	
Total responses	161	Total responses	164
Not sure	18 (11.2%)	Not sure	15 (9.1%)
N/A_No Events	5 (3.1%)	N/A_No Events	12 (7.3%)

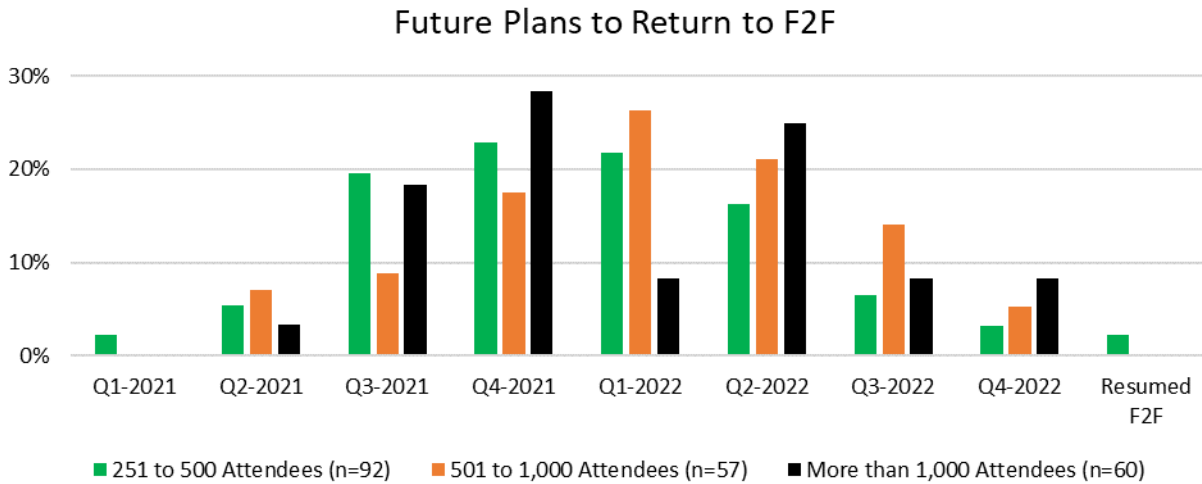


Larger Meetings

Total Counts					
251 to 500 attendees		501 to 1,000 attendees		More than 1,000 attendees	
Total responses	143	Total responses	126	Total responses	133
Not sure	14 (9.8%)	Not sure	10 (7.9%)	Not sure	6 (4.5%)
N/A_No Events	37 (25.9%)	N/A_No Events	59 (46.8%)	N/A_No Events	67 (50.4.9%)

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(Omitted: Small n's for all fill-in responses)

Other Responses (n=2)

Top mentions: n is too small

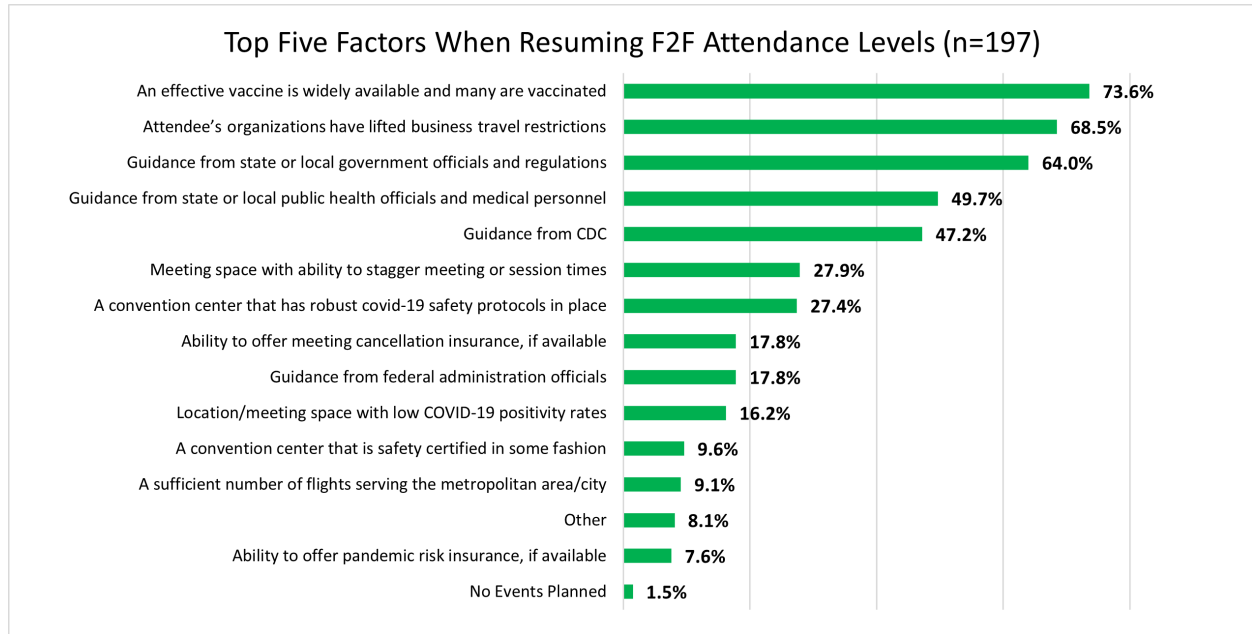
For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: When contemplating resuming any attendance level of face-to-face meetings, what are the Top Five primary factors your organization is considering? (Select all that apply)

When resuming face-to-face meetings, the top five factors to be considered are an effective vaccine where many are vaccinated, business travel restrictions are lifted, guidance from state and local government officials, guidance from state and local public health officials and guidance from the CDC. Furthermore, most organizations will base their decision on a vaccine that is widely utilized, and lifted travel bans in conference attendee organizations, followed by guidance from state, local and national officials. Nearly half or more of these organizations selected one of these top five factors. After the top five factors there is a considerable drop off in response to the remaining factors.

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Other Responses (n=16)

Top mentions: n is too small

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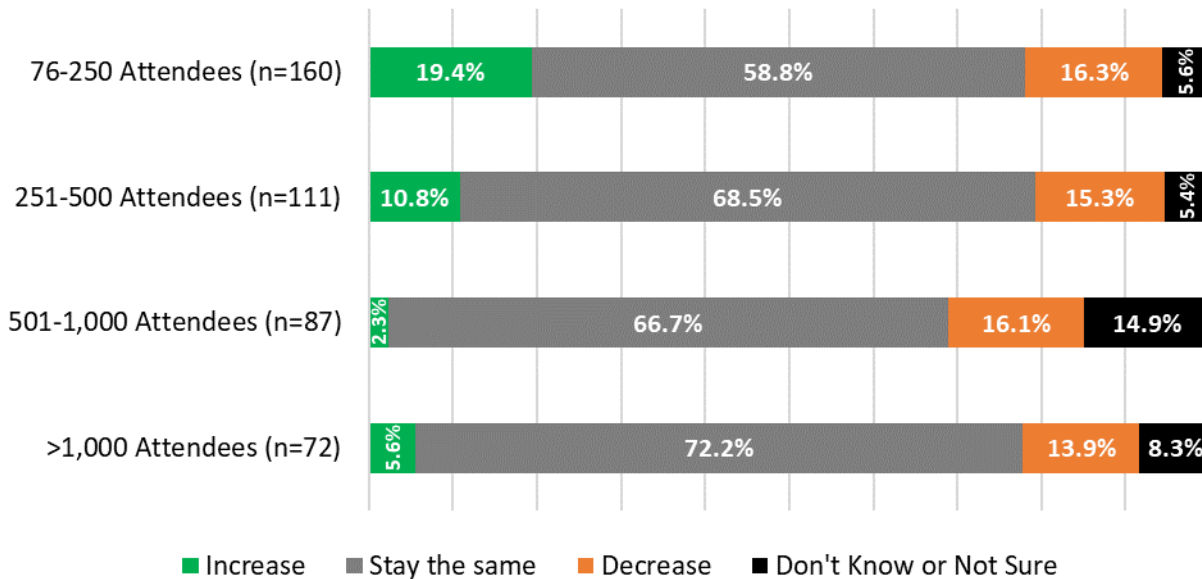
Q: How likely will your organization plan on having the same number of Face-to-Face conferences/expos/events once it's safe to reconvene?

For meetings over 250 attendees, at least two-thirds of these organizations believe that attendance numbers will stay the same. This number drops slightly to 58.8% for meetings of 76 to 250 attendees. Smaller meeting believe they will see more of an increase in attendees compared to larger meetings. Across all meeting sizes, approximately 15% of organizations expect to see a decrease in attendance.

Total Counts							
76 to 250 attendees		251 to 500 attendees		501 to 1,000 attendees		More than 1,000 attendees	
Total responses	177	Total responses	156	Total responses	157	Total responses	143
N/A_No Events	17 (9.6%)	N/A_No Events	45 (28.8%)	N/A_No Events	70 (44.6%)	N/A_No Events	71 (49.7%)

The data in this report are final.

Anticipation of Same Number of F2F Attendees



Other Responses (n=7)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: With the health crisis continuing to disrupt pre-scheduled, Face-to-Face events, please provide examples of ways your organization is creating new experiences or re-imagining new learning and networking opportunities for attendees. (n=129)



Top mentions: virtual, event, meet, member, webinar

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

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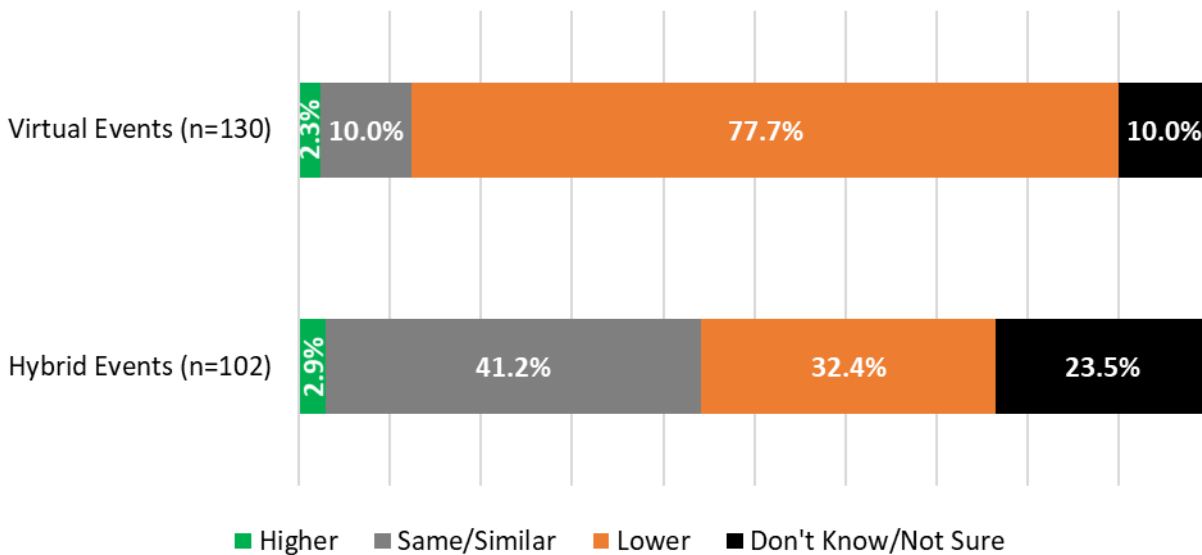
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Q: Over the next 15 months (February 1, 2021-April 30, 2022), if your organization modified events to virtual/hybrid in 2020 or are continuing with virtual/hybrid events in 2021, how will your event prices compare to your in-person registration fees?

For virtual events, more than three quarters (77.7%) lowered registration fees when compared to in-person. For hybrid events, more than two in five (41.2%) organizations kept registration fees the same, where only one third (32.4%) lowered registration fees.

Total Counts			
Virtual		Hybrid	
Total responses	133	Total responses	126
N/A_ No Events	3 (2.3%)	N/A_ No Events	24 (19.0%)

Registration Fee Comparison to F2F Meetings



C,E&E - Financial Impact

Q: As a result of cancellations or modifications to any Face-to-Face conferences/expos/events due to the ongoing global health crisis, please indicate your organization's **actual and projected total revenue loss or gain** regardless of any aid (e.g., insurance coverage, government benefits) for the time frames below.

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Previous FY Actual Loss:

One out of 10 (11.6%) organizations are not sure or found the previous fiscal year actual loss not applicable. Of the 144 organizations reporting an actual loss in the previous fiscal year from conference and meeting cancellations, just over half (52.1%) reported a loss of \$100K or less. Another three in 10 (29.9%) reported an actual loss of 100K to 500K. 18.2% of organizations saw actual losses of 500K or more, where 11.9% reported actual losses of \$1M or more.

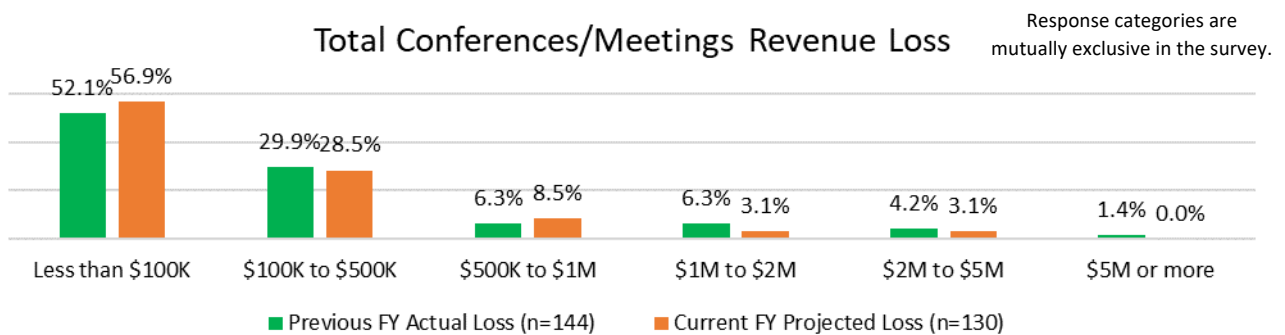
Current FY Projected Loss:

One out of five (20.7%) organizations are not sure or found the current fiscal year projected loss not applicable. Of the 130 organizations reporting a projected loss in the current fiscal year from conference and meeting cancellations, nearly three out of five (56.9%) organizations reported a loss of \$100K or less. Another three in 10 (28.5%) reported a projected loss of 100K to 500K. 14.7% of organizations project losses of 500K or more in the current fiscal year, only 6.2% are projected to lose \$1M or more.

The previous fiscal year actual loss data from conference and meeting cancellations looks very comparable to the current fiscal year projected data.

Conferences/Meetings Cancellations			
Previous FY Actual Loss		Current FY Projected Loss	
Total responses	163	Total responses	164
Not sure	3 (1.8%)	Not sure	23 (14.0%)
N/A	16 (9.8%)	N/A	11 (6.7%)

Not sure and N/A dropped from Total Revenue Loss chart



Previous FY Actual Gain:

Nearly half (44.5%) of organizations are not sure or found the previous fiscal year actual gain not applicable. Some of these “N/A” equate to respondents entering loss data as well. Of the 30 organizations reporting an actual gain in the previous fiscal year from conference and meeting cancellations, nearly two-thirds (63.3%) reported a gain of \$100K or less. Another one in 5 (20.0%) reported an actual gain of 100K to 500K. 16.6% of organizations saw actual gains of 500K or more, only 3.3% reported actual gains of \$1M or more.

Current FY Projected Gain:

Over half (54.7%) of organizations are not sure or found the current fiscal year projected gain not applicable. Of the 24 organizations reporting a projected gain in the current fiscal year from conference and meeting cancellations, nearly two-thirds (62.5%) of organizations reported a gain of \$100K or less.

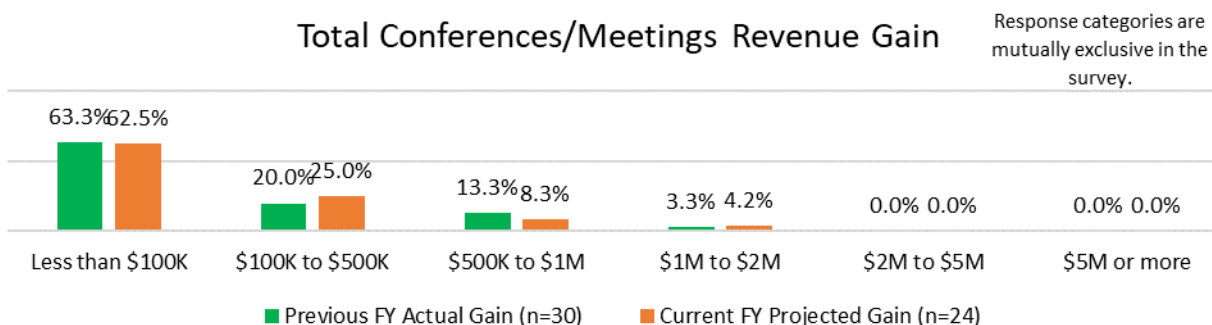
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Another quarter (25.0%) reported a projected gain of 100K to 500K. 12.5% of organizations project gains of 500K or more in the current fiscal year, only 4.2% project gains of \$1M or more.

The previous fiscal year actual gains data from conference and meeting cancellations looks very comparable to the current fiscal year projections.

Conferences/Meetings Cancellations			
Previous FY Actual Gain		Current FY Projected Gain	
Total responses	54	Total responses	53
Not sure	1 (1.9%)	Not sure	9 (17.0%)
N/A	23 (42.6%)	N/A	20 (37.7%)

Not sure and N/A dropped from Total Revenue Gain chart



Q: As a result of cancellations or modifications to any Face-to-Face conferences/expos/events due to the ongoing global health crisis, please indicate your organization's **actual and projected revenue loss or gain as a percentage of total annual revenue** regardless of any aid (e.g., insurance coverage, government benefits) for the time frames below.

Please note: this question and the one above are exactly the same, but response choices below were framed as of percentage of revenue, as opposed to absolute dollars in the question above.

Previous FY Actual Loss (%):

Nearly one in five (17.3%) of organizations reported no projected loss as a result of meeting cancellations. Of the 129 organizations reporting an actual loss in the previous fiscal year from conference and meeting cancellations as a percentage of total annual revenue, 86.0% reported an actual loss in the previous fiscal year of 50% or less. Only 13.9% reported a loss of 50% or more, with only 2.3% reporting a loss of 75% or more.

Current FY Projected Loss (%):

Slightly more than one in five (21.0%) of organizations reported no projected loss as a result of meeting cancellations. Of the 124 organizations reporting a current fiscal year projected loss from conference and meeting cancellations as a percentage of total annual revenue, nine in 10 (90.3%) reported a projected loss in the current fiscal year of 50% or less. One in 10 (9.7%) organizations reported a loss of 50% or more, with only 1.6% reporting a loss of 75% or more.

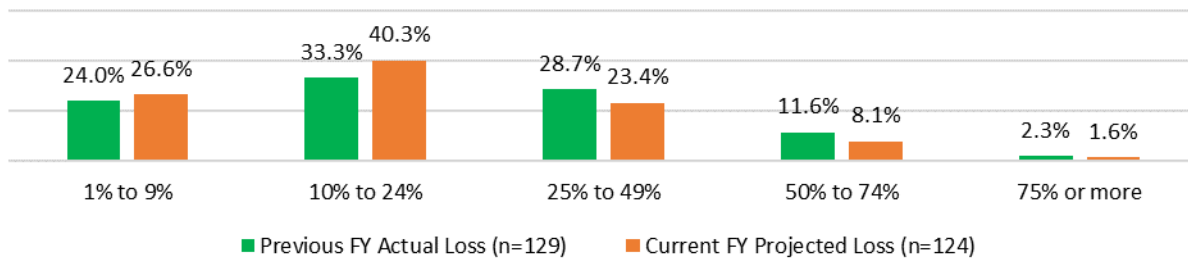
The data in this report are final.

The previous fiscal year actual loss data from conference and meeting cancellations reported as a percentage of total annual revenue looks very comparable, yet skewing slightly worse in the current fiscal year projections.

Conferences/Meetings Cancellations			
Previous FY Actual Loss		Current FY Projected Loss	
Total responses	156	Total responses	157
No Loss	27 (17.3%)	No Loss	33 (21.0%)

No Loss dropped from Total Revenue % Loss chart

Total Conferences/Meetings Revenue % Loss



Previous FY Actual Gain (%):

Nearly two in five (36.8%) of organizations reported no projected loss as a result of meeting cancellations. Of the 24 organizations reporting an actual gain from conference and meeting cancellations in the previous fiscal year as a percentage of total annual revenue, nearly all (95.8%) reported an actual gain in the previous fiscal year of 25% or less. Only 4.2% reported a gain of 25% or more, with no one reporting a gain of 50% or more.

Current FY Projected Gain (%):

Nearly one-third (32.4%) of organizations reported no projected gain as a result of meeting cancellations. Of the 26 organizations reporting a current fiscal year projected gain from conference and meeting cancellations as a percentage of total annual revenue, all (100.0%) reported a projected gain in the current fiscal year of 25% or less. No organizations reported a projected gain of more than 25%.

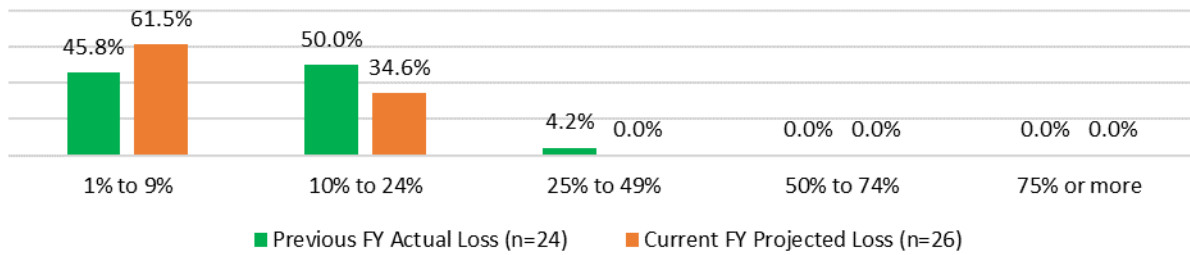
Current fiscal year projections illustrate less gains from conference and meeting cancellations when compared to previous fiscal year projections.

Conferences/Meetings Cancellations			
Previous FY Actual Gain		Current FY Projected Gain	
Total responses	38	Total responses	37
No Loss	14 (36.8%)	No Loss	12 (32.4%)

No Loss dropped from Total Revenue % Gain chart

The data in this report are final.

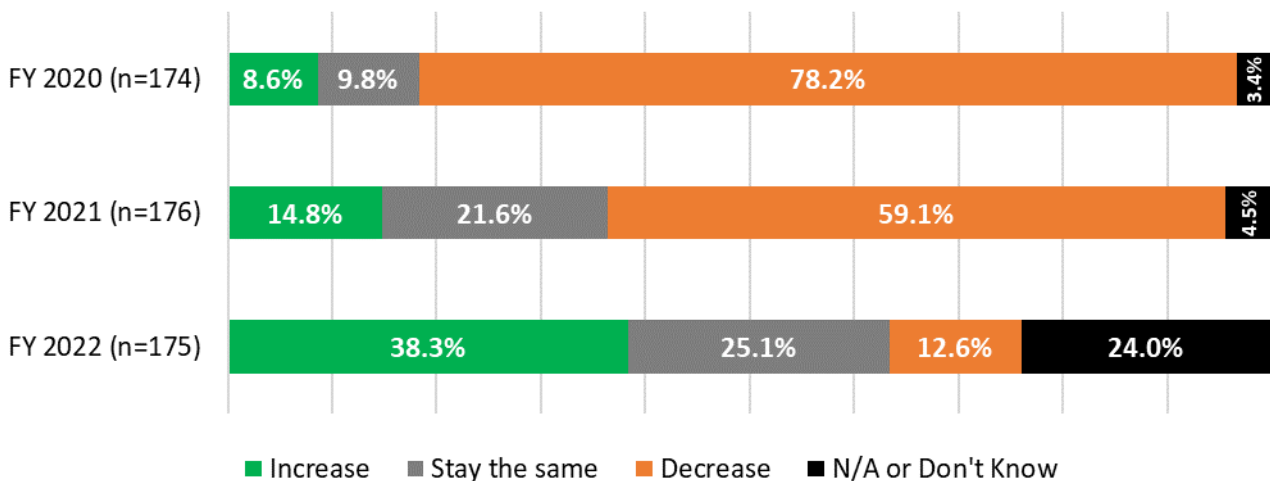
Total Conferences/Meetings Revenue % Gain



Q: In comparison to your organization's FY 2019, does your organization anticipate revenue from conferences/expos/events will increase, decrease, or stay the same in FY 2020, FY 2021, and FY 2022 as a result of the ongoing global health crisis?

More than three-quarters (78.2%) of organizations anticipate a decrease in revenue from conferences/expos/events in the 2020 fiscal year, whereas for the 2021 fiscal year this drops to three out of five (59.1%) and even less in the 2022 fiscal year to approximately one in 10 (12.6%). This data demonstrates a trend back to normal as the anticipation of decreases in revenue reduces subsequently anticipated revenue for organizations stay the same and/or increases grow over time or through the listed fiscal years.

Anticipation of Revenue from Conferences/Expos/Events



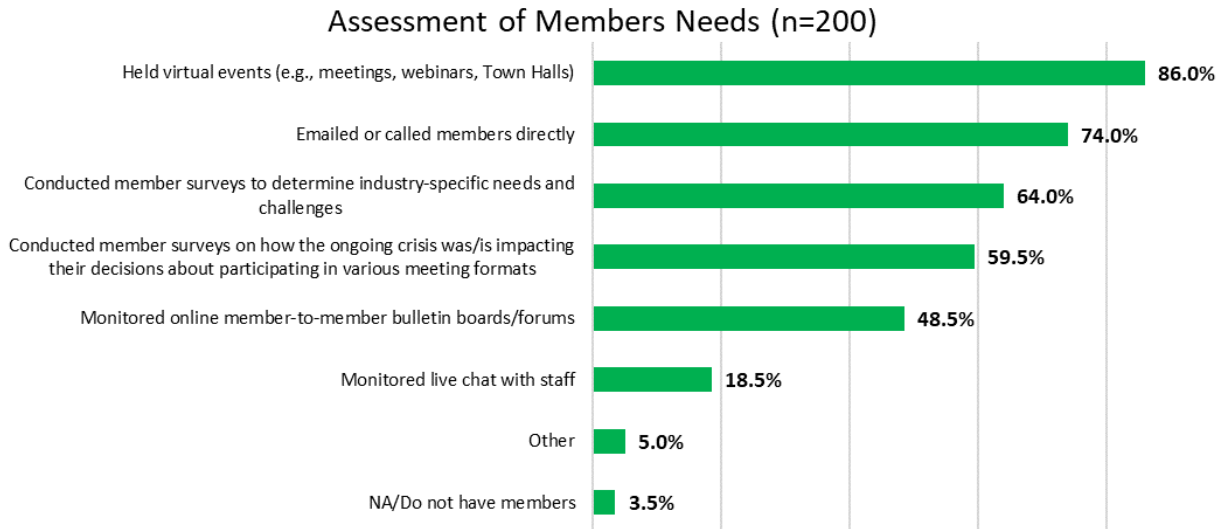
The data in this report are final.

Section 3: Member Needs and Engagement

MN & E - A look back at 2020

Q: What did your organization do in 2020 to assess the needs of your members during this ongoing global health crisis? (Select all that apply)

Organizations created and held virtual events (86.0%), communicated with members directly (74.0%) and via surveys investigating the industry specific needs (64.0%) and impact on meetings and their decisions (59.5%).



Other Responses (n=10)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

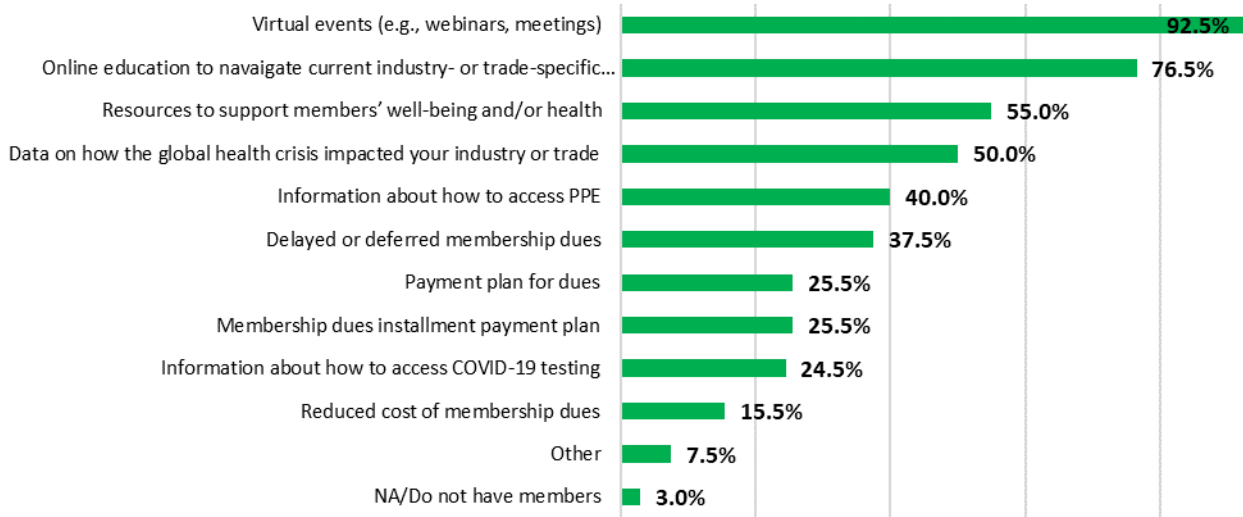
Q: Which of the following programs or activities did your organization offer members for support in 2020 during the ongoing global health crisis? (Select all that apply)

The top three programs or activities organization offered members were virtual events (92.5%), online education (76.5%), and resources on members well-being (55.0%).

The data in this report are final.

23

Programs or Activities Offered (n=200)



Other Responses (n=15)

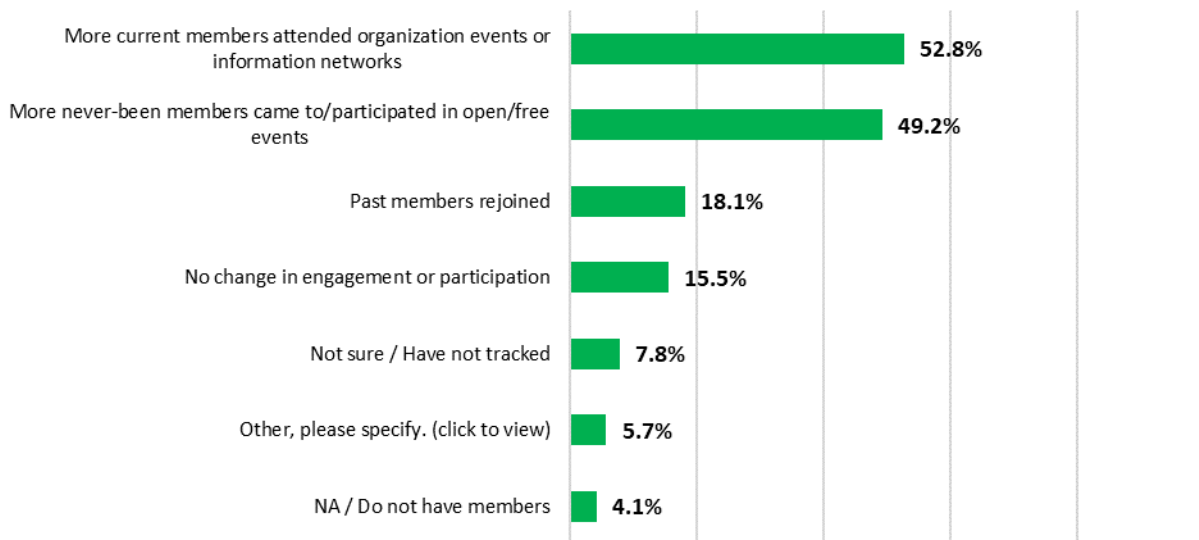
Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: Which of the following member engagement activities did your organization observe in 2020 as a result of the ongoing health crisis? (Select all that apply)

Just over half (52.8%) of organizations have had current members events or information networks, and almost half (49.2%) received engagement from non-members.

Member Engagement Activities (n=193)



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Other Responses (n=11)

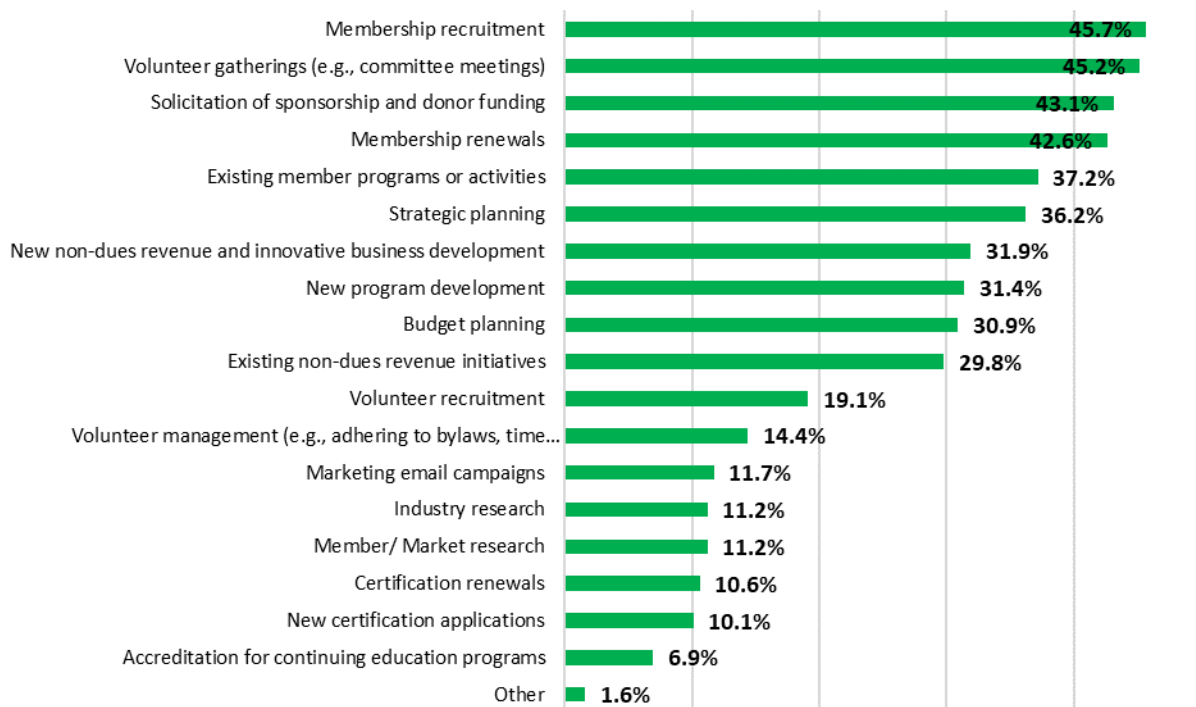
Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: Which of the following member-related activities were most affected by the ongoing global health crisis, due to either discontinuation or modification? (Select all that apply)

Nearly half (45.7%) of organizations reported issues with member recruitment and another (45.2%) reported issues with volunteer gatherings. Additionally, solicitation of sponsorship and donor funding (43.1%) and membership renewals (42.6%) both fall with this range just below half but more than two-fifths.

Affected Member Related Activities (n=189)



Other Responses (n=3)

Top mentions: n is too small

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Q: From the list below, please rank order (up to 5) your organization’s member-related activity focus for 2021 during this global health crisis. If your organization's top five member-related activities are not listed below, please use the comment box to add additional activities.

Organizations in 2021 will be focusing the most on member retention and member benefits. Furthermore, organizations will focus on networking and the acquisition of new members as well as assessing their needs.

Item	Overall Rank	Rank Distribution	Score	No. of Rankings
Membership retention	1		578	153
Membership benefits	2		549	146
Networking	3		491	144
Member acquisition	4		360	120
Needs assessment	5		238	79
Volunteer management	6		167	67
Certification	7		113	36
Membership staff new skills acquisition (e.g., meeting planning)	8		105	48

Lowest Rank Highest Rank

*See Appendix for definitions of Overall Rank, Rank Distribution, Score and No. of Rankings

Other Responses (n=8)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

The data in this report are final.

Q: What would your top-ranked membership activity focus for 2021 look like in practice? (n=124)



Top mentions: new, engage, person, virtual, program

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: What would your second-ranked membership activity focus for 2021 look like in practice? (n=117)



Top mentions: new, event, person, engage, virtual

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

MN & E - Financial Impact

Q: As a result of lost membership dues revenue (e.g., non-renewal, deferment) due to the ongoing global health crisis, please indicate your organization's **actual and projected total revenue loss or gain** regardless of any aid (e.g., insurance coverage, government benefits) for the time frames below.

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Previous FY Actual Loss:

Nearly one in five (18.5%) organizations are not sure or found the previous fiscal year actual loss not applicable. Of the 124 organizations reporting an actual loss in the previous fiscal year from lost membership dues, just over three-quarters (75.8%) reported a loss of \$100K or less. Another one in five (17.7%) reported an actual loss of 100K to 500K. Only 6.4% of organizations saw actual losses of 500K or more, where 4.0% reported actual losses of \$1M or more.

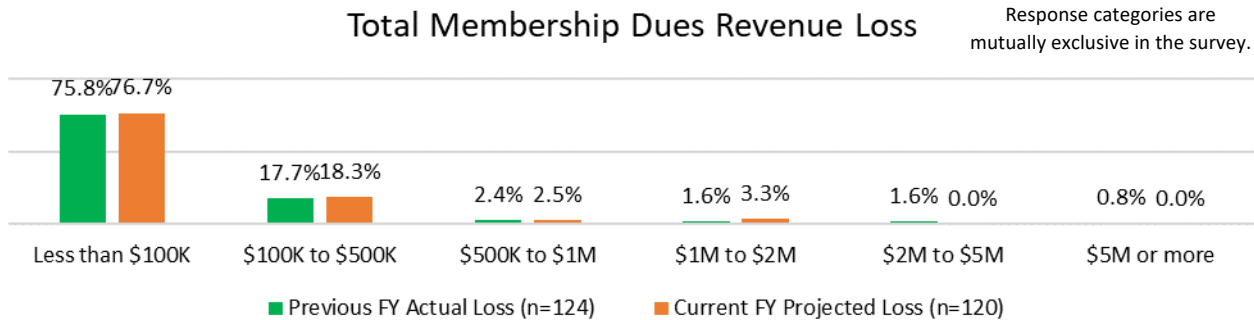
Current FY Projected Loss:

One out of five (21.6%) organizations are not sure or found the current fiscal year projected loss not applicable. Of the 120 organizations reporting a projected loss in the current fiscal year from lost membership dues, more than three quarters (76.7%) of organizations reported a loss of \$100K or less. Another nearly one in five (18.3%) reported a projected loss of 100K to 500K. Only 5.8% of organizations project losses of 500K or more in the current fiscal year, of which only 3.3% are projected to lose \$1M or more.

The previous fiscal year actual loss data from lost membership dues looks very comparable to the current fiscal year projections.

Membership Dues			
Previous FY Actual Loss		Current FY Projected Loss	
Total responses	152	Total responses	153
Not sure	8 (5.3%)	Not sure	15 (9.8%)
N/A	20 (13.2%)	N/A	18 (11.8%)

Not sure and N/A dropped from Total Revenue Loss chart



Previous FY Actual Gain:

More than half (55.5%) of organizations are not sure or found the previous fiscal year actual gain not applicable. Some of these “N/A” equate to respondents entering loss data as well. Of the 20 organizations reporting an actual gain in the previous fiscal year from lost membership dues, three quarters (75.0%) reported a gain of \$100K or less. Another one in 5 (20.0%) reported an actual gain of 100K to 500K. 5.0% of organizations saw actual gains of 500K or more and no organizations reported actual gains of \$1M or more.

Current FY Projected Gain:

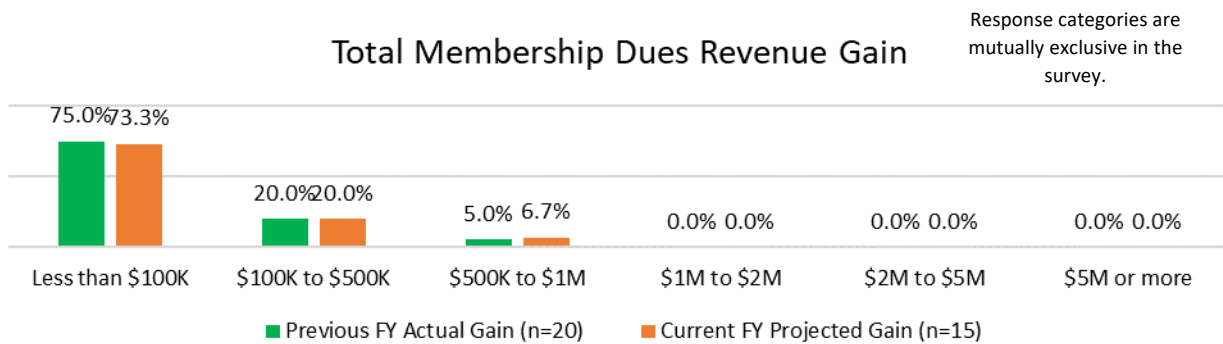
The data in this report are final.

Nearly two-thirds (63.5%) of organizations are not sure or found the current fiscal year projected gain not applicable. Of the 15 organizations reporting a projected gain in the current fiscal year from lost membership dues, nearly three quarters (73.3%) of organizations reported a gain of \$100K or less. Another one in five (20.0%) reported an projected gain of 100K to 500K. Only 5.0% of organizations project gains of 500K or more in the current fiscal year and no organizations reported current projections of \$1M or more in gains.

The previous fiscal year actual gains data from lost membership dues looks very comparable to the current fiscal year projection data.

Membership Dues			
Previous FY Actual Gain		Current FY Projected Gain	
Total responses	45	Total responses	41
Not sure	2 (4.4%)	Not sure	9 (22.0%)
N/A	23 (51.1%)	N/A	17 (41.5%)

Not sure and N/A dropped from Total Revenue Gain chart



Q: As a result of lost membership dues revenue (e.g., non-renewal, deferment) due to the ongoing global health crisis, please indicate your organization's **booked and projected revenue loss or gain** as a percentage of total annual revenue regardless of any aid (e.g., insurance coverage, government benefits) for the time frames below.

Please note: this question and the one above are exactly the same, but response choices below were framed as of percentage of revenue, as opposed to absolute dollars in the question above.

Previous FY Actual Loss (%):

Slightly more than one in five (21.1%) organizations reported no projected loss as a result of lost membership dues. Of the 112 organizations reporting an actual loss in the previous fiscal year from lost membership dues as a percentage of total annual revenue, nearly all (97.3%) reported an actual loss in the previous fiscal year of 50% or less. Only 2.7% reported a loss of 50% or more, with no organizations reporting an actual loss of 75% or more.

The data in this report are final.

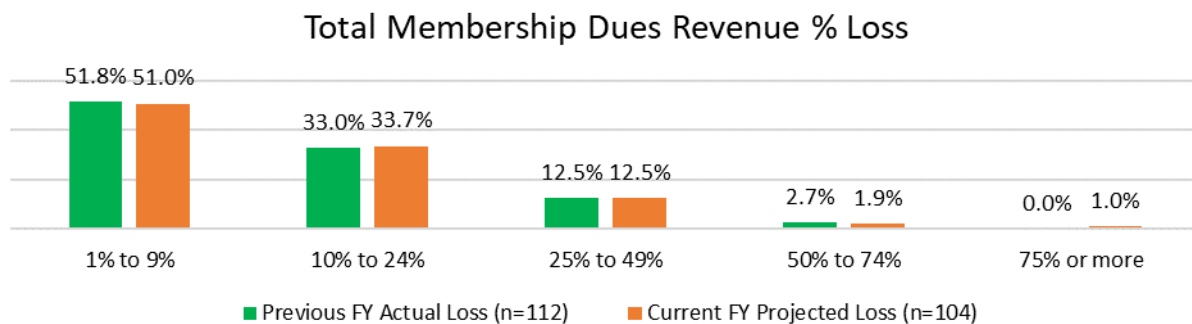
Current FY Projected Loss (%):

More than a quarter (28.3%) of organizations reported no projected loss as a result of lost membership dues. Of the 104 organizations reporting a current fiscal year projected loss from lost membership dues as a percentage of total annual revenue, nearly all (98.1%) reported a projected loss in the current fiscal year of 50% or less. Only 1.9% reported a projected loss of 50% or more, with no organizations reporting a projected loss of 75% or more.

The previous fiscal year actual loss data from lost membership dues reported as a percentage of total annual revenue looks very comparable to the current fiscal year projections.

Membership Dues			
Previous FY Actual Loss		Current FY Projected Loss	
Total responses	142	Total responses	145
No Loss	30 (21.1%)	No Loss	41 (28.3%)

No Loss dropped from Total Revenue % Loss chart



Previous FY Actual Gain (%):

Nearly half (45.7%) of organizations reported no projected loss as a result of lost membership dues. Of the 19 organizations reporting an actual gain from lost membership dues in the previous fiscal year as a percentage of total annual revenue, more than four out of five (84.2%) reported an actual gain in the previous fiscal year of 25% or less. Only 15.8% reported a gain of 25% or more, with no one reporting a gain of 50% or more.

Current FY Projected Gain (%):

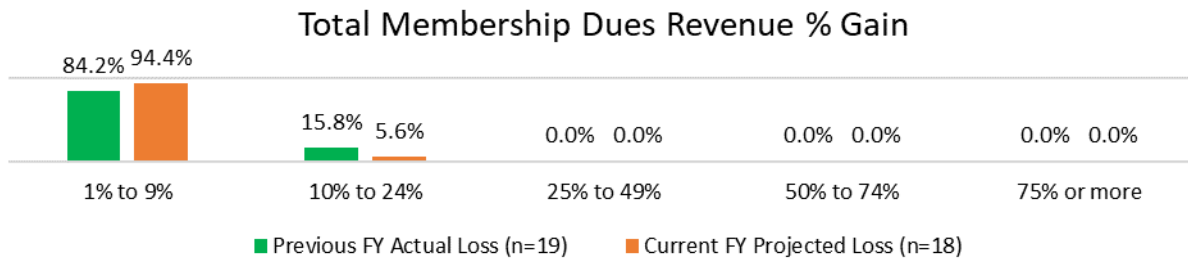
Two in five (40.0%) organizations reported no projected gain as a result of lost membership dues. Of the 18 organizations reporting a current fiscal year projected gain from lost membership dues as a percentage of total annual revenue, all (100.0%) reported a projected gain in the current fiscal year of 25% or less. No organizations reported a projected gain of more than 25%.

Current fiscal year projections illustrate less gains from lost membership dues when compared to previous fiscal year projections.

The data in this report are final.

Membership Dues			
Previous FY Actual Gain		Current FY Projected Gain	
Total responses	35	Total responses	30
No Loss	16 (45.7%)	No Loss	12 (40.0%)

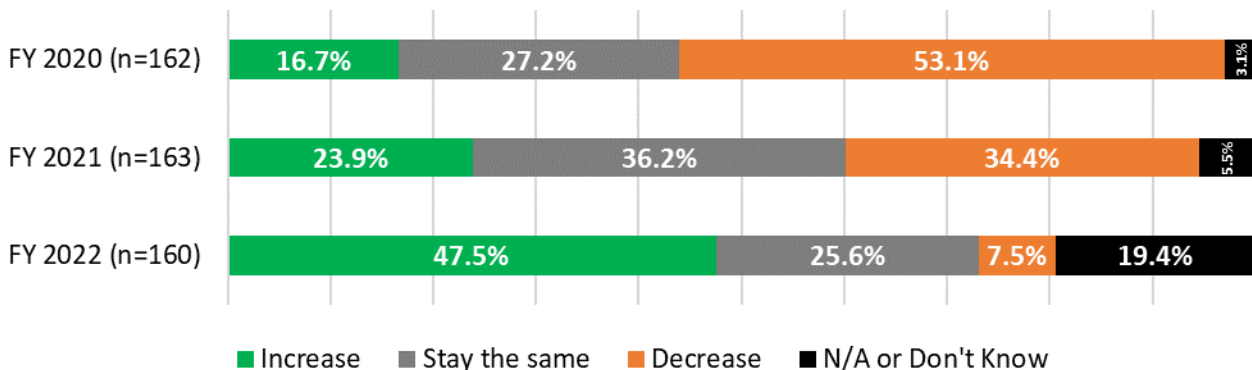
No Loss dropped from Total Revenue % Gain chart



Q: In comparison to FY 2019, does your organization anticipate revenue from membership dues will increase, decrease, or stay the same in FY 2020, FY 2021, and FY 2022 as a result of the ongoing global health crisis?

More than half (53.1%) of organizations anticipate a decrease in revenue from membership dues in the 2020 fiscal year, whereas for the 2021 fiscal year this drops to slightly over a third (34.4%) and even less in the 2022 fiscal year to less than one in 10 (7.5%). This data demonstrates a trend back to normal as the anticipation of decreases in revenue reduces subsequently anticipated revenue for organizations membership dues to “increase” over time or through the listed fiscal years.

Anticipation of Revenue from Membership Dues



The data in this report are final.

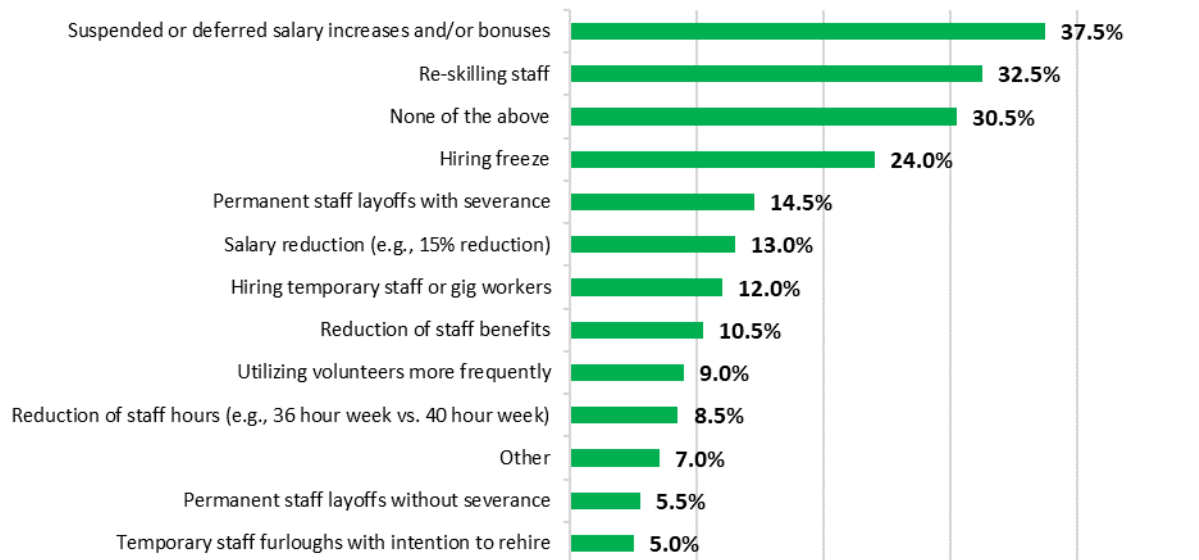
Section 4: Staff and Work Policies

S & WP - A look back at 2020

Q: Which of the following staffing changes has occurred in 2020 due to the ongoing global health crisis? (Select all that apply)

Three in 10 (30.5%) organizations did not make staff changes in 2020. Nearly two in five (37.5%) organizations suspended or deferred salary increases and/or bonuses, one third (32.5%) re-skilled their staff and one quarter (24.0%) implemented hiring freezes.

Types of Staffing Changes (n=200)



Other Responses (n=14)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

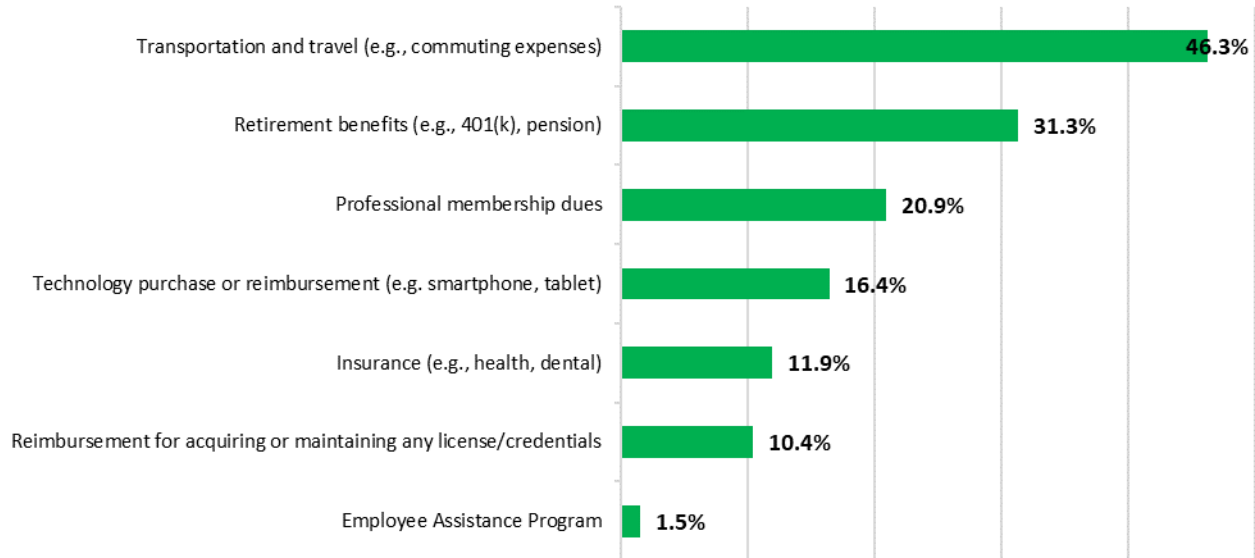
Q: Which of the following staff benefits were reduced or discontinued in 2020? (Select all that apply)

From the above “Types of Staff Changes” question, the data illustrates that 10.5% had a reduction in staff benefits. Transportation and travel (46.3%) was the hardest hit staff benefits in 2020, followed by retirement benefits (31.3%) and professional membership dues (20.9%).

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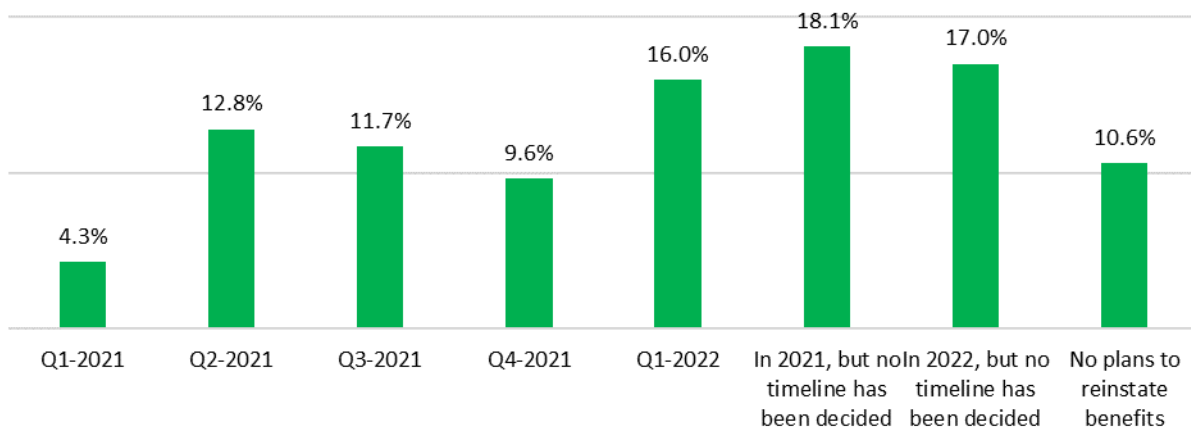
Discontinued Staff Benefits (n=67)



Q: When do you anticipate reinstating the reduced or discontinued benefits resulting from the ongoing health crisis in 2020?

Only one in 10 (10.6%) have no plans to reinstate benefits, more than half (56.5%) plan to reinstate in 2021 and one third (33.0%) have a plan to reinstate in 2022.

Anticipated Reinstatement of Benefits (n=94)



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Q: How many staff members did your organization temporarily furlough or permanently laid off in 2020?

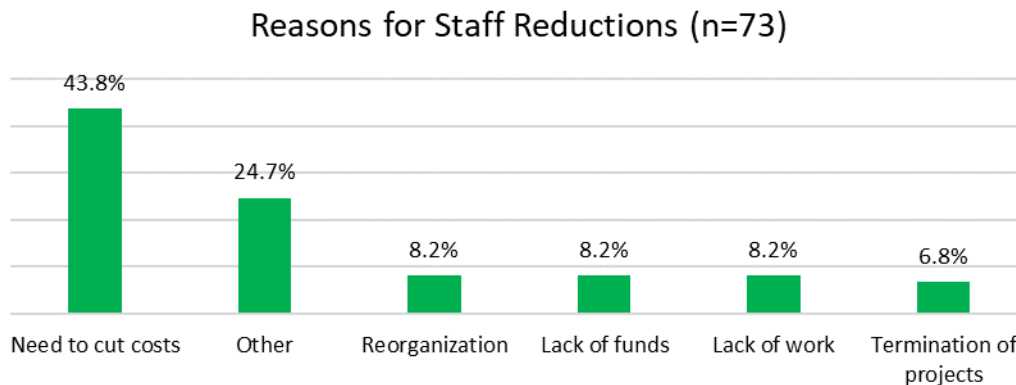
From the “Types of Staff Changes” question above, the data illustrates that 5.5% of organizations indicated they have temporarily furloughed staff and 14.5% have permanently laid off staff (w/severance) and 5.5% have permanently laid off staff (w/o severance).

On average, organizations are temporarily furloughing almost three quarters (0.77) of a full-time employee, yet when the outlier of 50 is removed, the average drops to roughly half (0.42) of a full-time employee. Organizations are permanently laying off nearly one and a quarter (1.16) employees, yet when the outlier of 27 is removed, this drops to about one (1.0) full-time employee.

Temporary Furlough		Permanently Laid Off	
Total responses	142	Total responses	142
Min.	0	Min.	0
Max.	50	Max.	27
Average	0.77	Average	1.16

Q: What was the primary reason for staff reductions?

Staff reductions were made to cut costs (43.8%), followed by both reorganizations and lack of funds (8.2%).



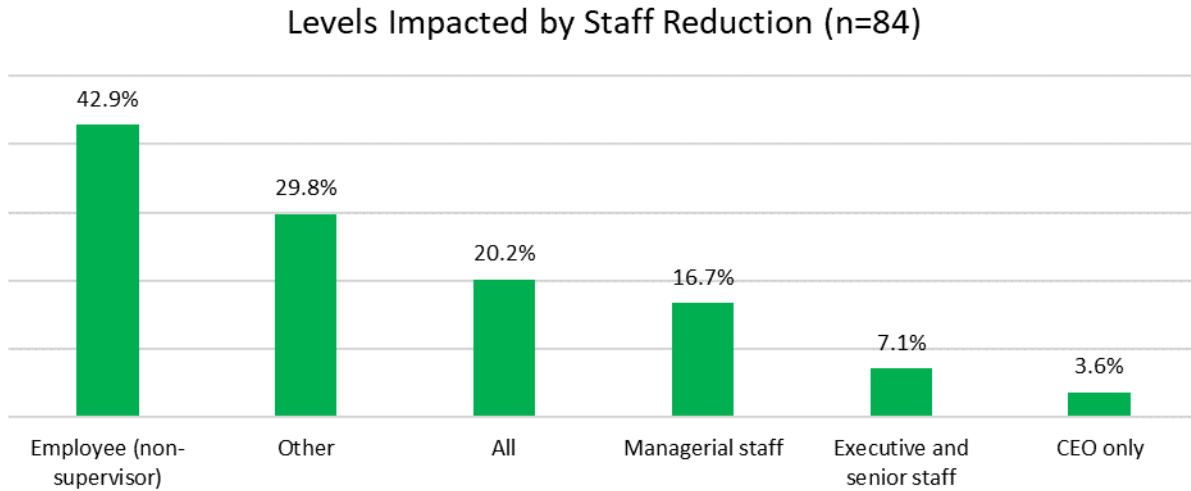
Other Responses (n=18)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: Which level(s) in your organization was impacted by staff reductions? (Select all that apply)

One in five (20.2%) organizations reported that “All” staffing groups were impacted by staff reductions. Employee (non-supervisor) (42.9%) were the hardest hit staffing group followed by managerial staff (16.7%).



Other Responses (n=25)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

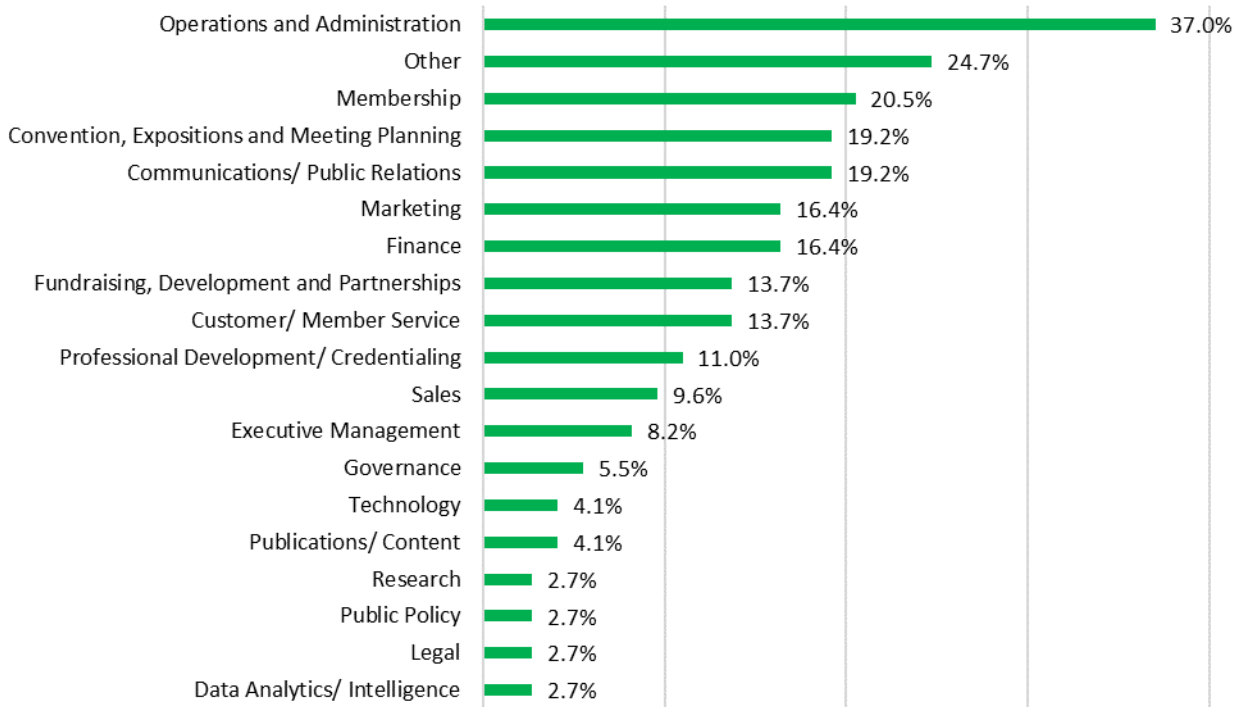
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Q: In which functional area(s) did your organization reduce staff? (Select all that apply)

All functional areas were affected by the reduction. Operations and administration (37.0%) was the hardest hit area followed by membership (20.5%), meeting planning (19.2%), communication (19.2%), finance and marketing (16.4%).

Functional Areas and Staff Reduction (n=73)



Other Responses (n=18)

Top mentions: n is too small

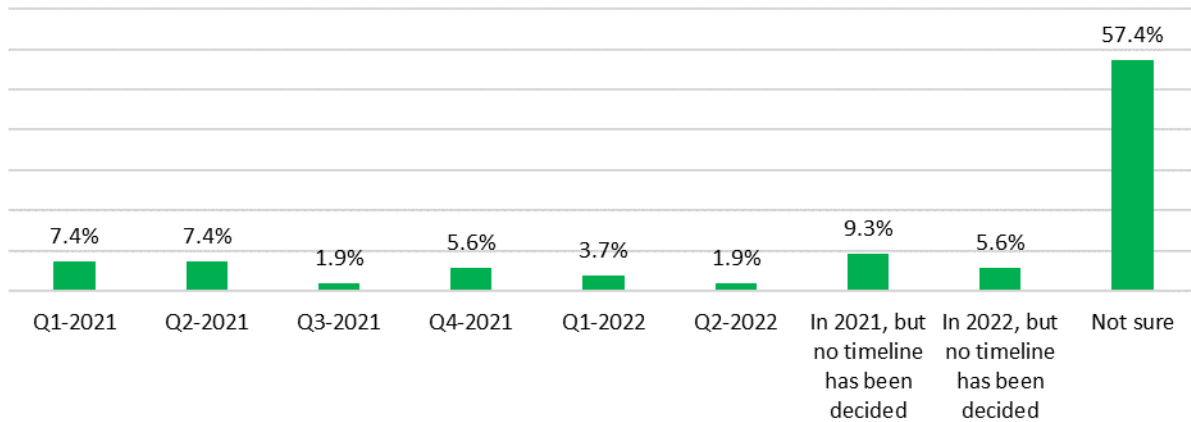
For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: When does your organization anticipate ending the furloughs and bringing back staff?

More than half (57.4%) of organizations are not sure when they plan to bring back staff. Of the remaining organizations who are planning to bring back staff, three quarters are planning to bring staff back in 2021.

The data in this report are final.

Ending Furloughs and Bringing Back Staff (n=54)

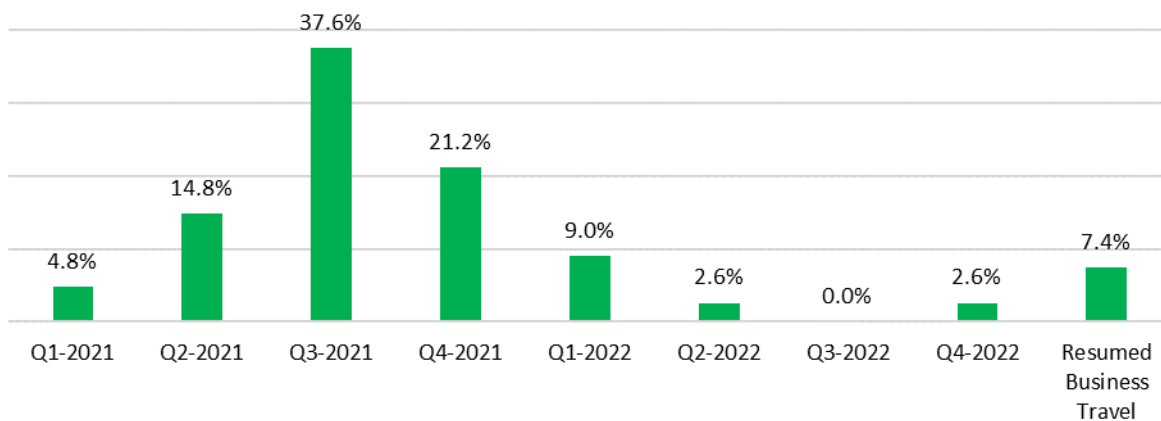


S & WP - A look towards 2021

Q: Based on your knowledge today, what is the earliest date you anticipate your organization will allow employees to travel for business?

Nearly one in 10 (7.4%) have already resumed business travel. The majority (58.8%) plan to resume business travel in the third and fourth quarters of 2021. This data is seen as an approximation for resumption of conference travel.

Return to Business Travel (n=189)

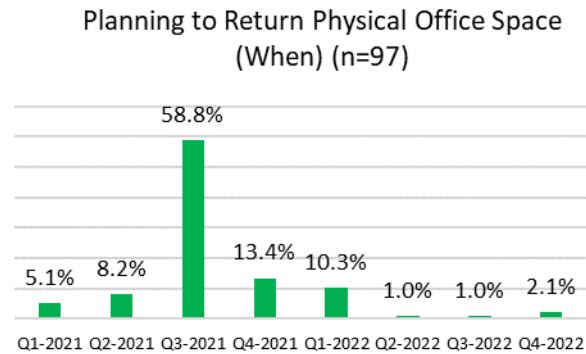
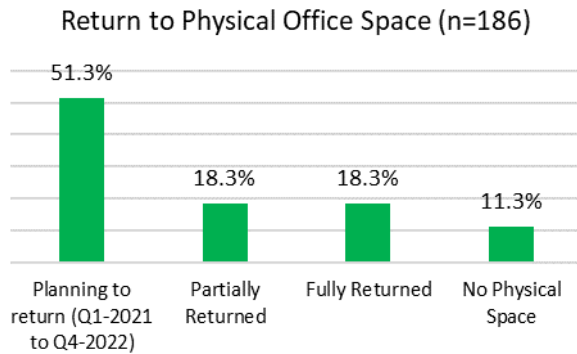


Q: Based on your knowledge today, what is the earliest date you anticipate your organization will allow a return of a majority of employees to the physical office space?

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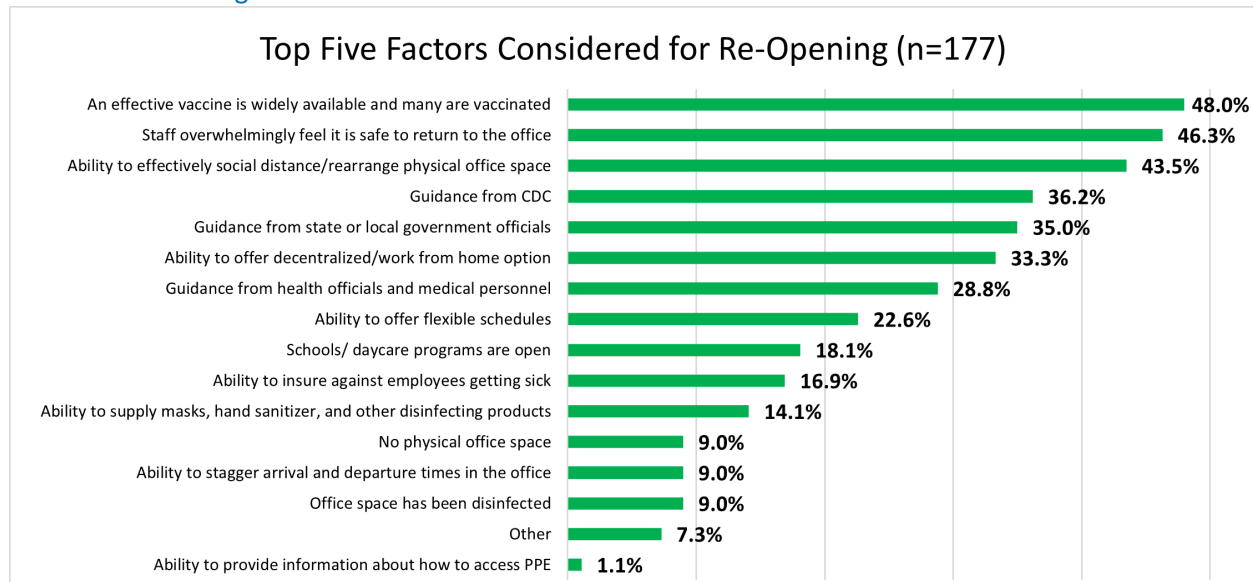
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Half (51.3%) of organizations plan to return to the office at some point over the next two years. Nearly two in five organizations either partially (18.3%) or fully (18.3%) returned to their physical office space with one in 10 not having physical office space. Of those who haven't returned to the office, three in five (58.8%) plan to return in Q3-2021 with (86.7% returning in Q3-2021 or later).



Q: When contemplating re-opening of your organization's physical office space, what are the Top Five primary factors your organization is considering? (Select all that apply)

Organizations want their staff to be vaccinated and/or have the access to a COVID-19 vaccine. Additionally, organizations want their staff to feel safe while proper safety protocols are implemented. Rounding out the top five factors organizations are considering are guidance from the CDC and guidance from state or local government officials.



Other Responses (n=13)

Top mentions: n is too small

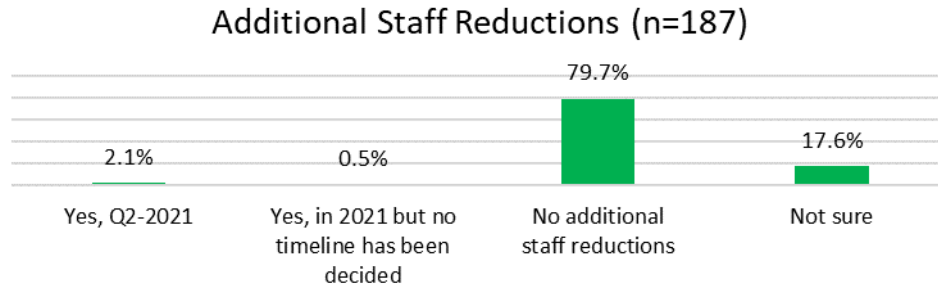
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Q: Does your organization anticipate additional staff reductions in the future?

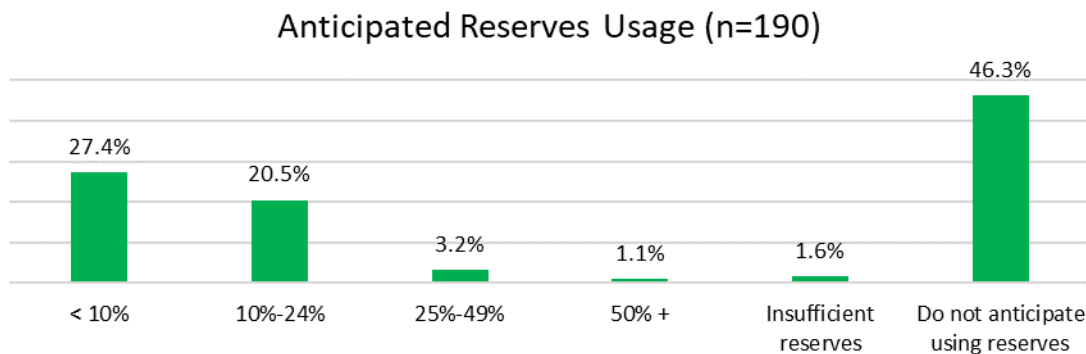
Nearly four in five (79.7%) organizations don't anticipate additional staff reductions in the future. Less than three percent (2.6%) of organizations expect to reduce staff moving forward.



S & WP - Financial Impact

Q: Over the next 15 months (February 1, 2021-April 20, 2022), approximately what percentage of your organization's reserves do you anticipate using to offset revenue losses due to the ongoing global health crisis?

Nearly half (46.3%) of organizations don't anticipate using reserves in the next 15 months. If reserve funds are needed nearly nine in 10 will not need more than 25% of your organization's reserves to offset revenue loss due to the ongoing global health crisis.



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Section 5: Organizational Culture

Q: From your perspective, how have the events of 2020 affected your thinking in general and around your organization’s culture, if at all? (n=131)

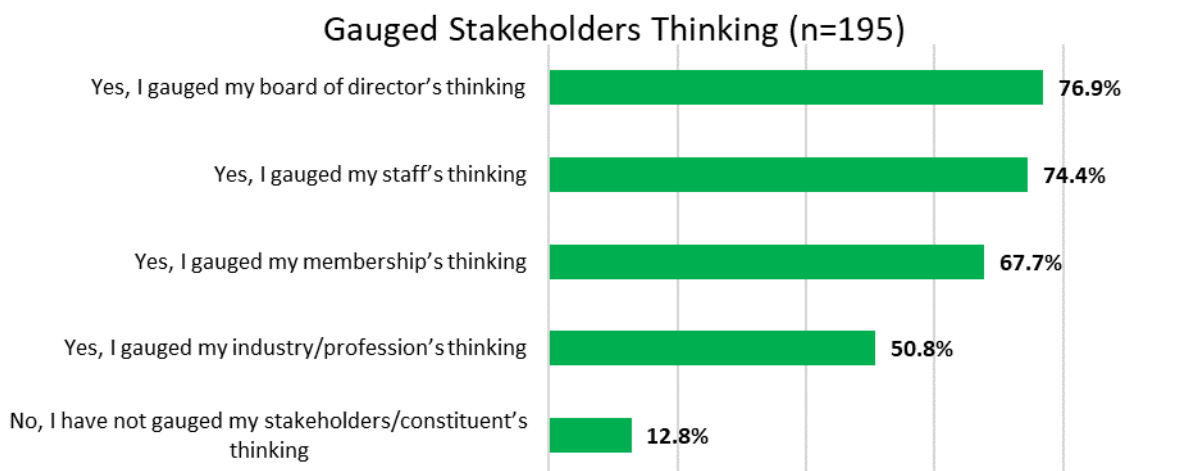


Top mentions: more, staff, need, work, culture

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: In this tumultuous year, have you gauged (e.g., discuss, survey, interview, etc.) your stakeholders/constituents’ thinking as to how the events in 2020 impacted them and their perspective on the overall organizational culture? (Select all that apply)

Approximately three quarters of organizations have gauged (communicated with or surveyed) their boards (76.9%) and their staffs (74.4%) and another two-thirds leveraged their membership (67.7%)



The data in this report are final.

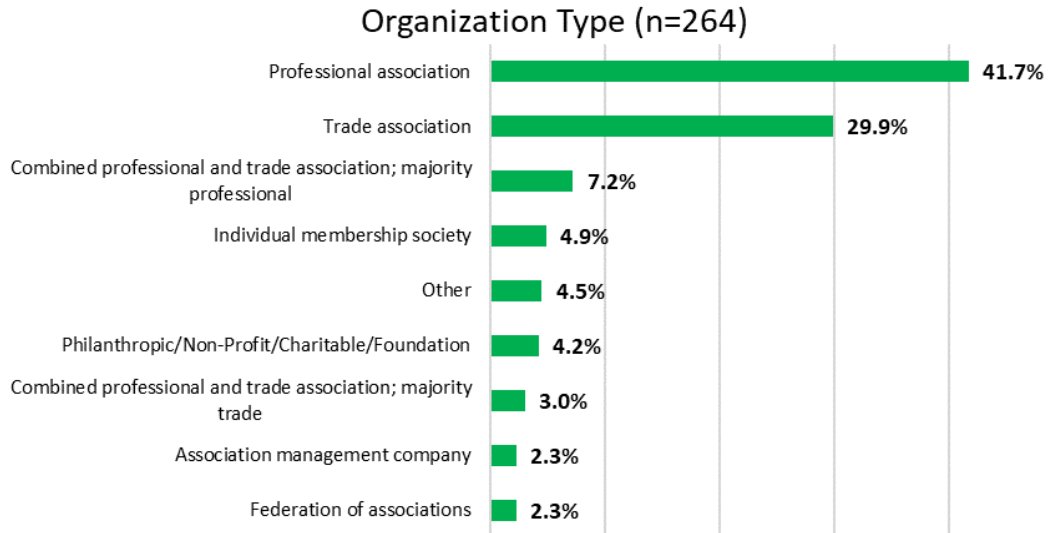
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Section 6: Demographics

Q: Select the option that most closely resembles your organization.

More than four in five (81.8%) organizations are professional (41.7%), Trade (29.9%) or a combination (10.2%) of professional and trade associations.



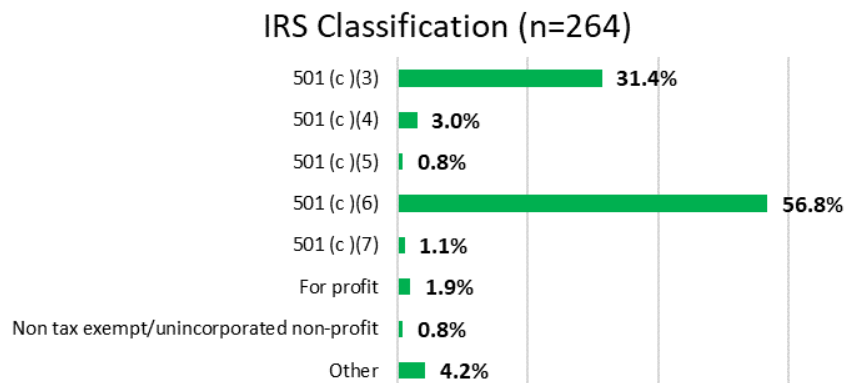
Other Responses (n=12)

Top mentions: n is too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

Q: What is the IRS Classification of your organization?

Nearly nine in 10 (88.2%) organizations are either 501c (6) (56.8%) or 501c (3) (31.4%). The remaining approximately 10% are spread evenly across the other classifications.



Other Responses (n=10)

Top mentions: n too small

For more information and/or qualitative analysis of free responses, please contact research@asaecenter.org.

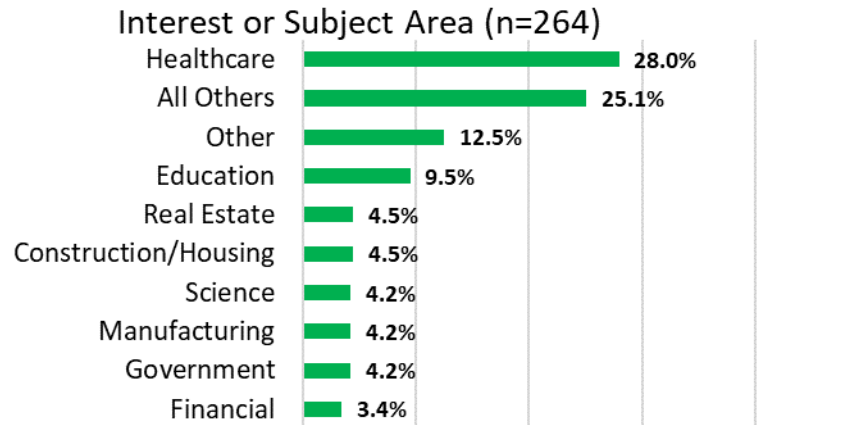
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Q: What is the primary interest/subject area of your organization?

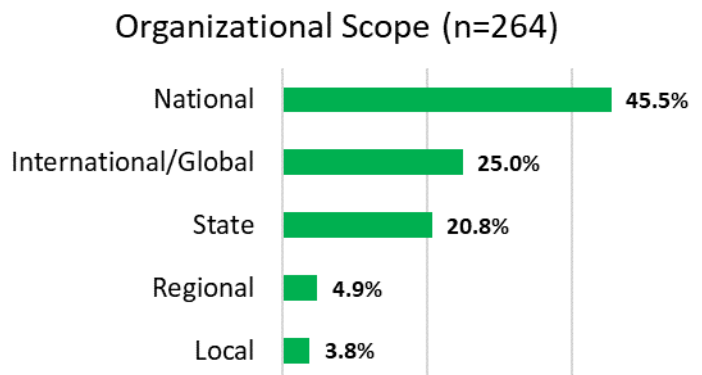
More than a quarter (28.0%) of organizations serve healthcare fields. The second most common area was education (9.5%). There is a nearly 30 different sectors who completed this Association Impact Survey, many are listed below the graphic.



All Others include: Agriculture, Architecture/Design, Automotive, Communications, Engineering, Entertainment/Art, Environment, Food/Restaurant, Hospitality, HR, Insurance, IT, Legal, Management, Philanthropy/Charity, Retail, Sorority/Fraternity/Social organization, Transportation and Utilities/Energy

Q: Which of the following best describes the primary scope of your organization?

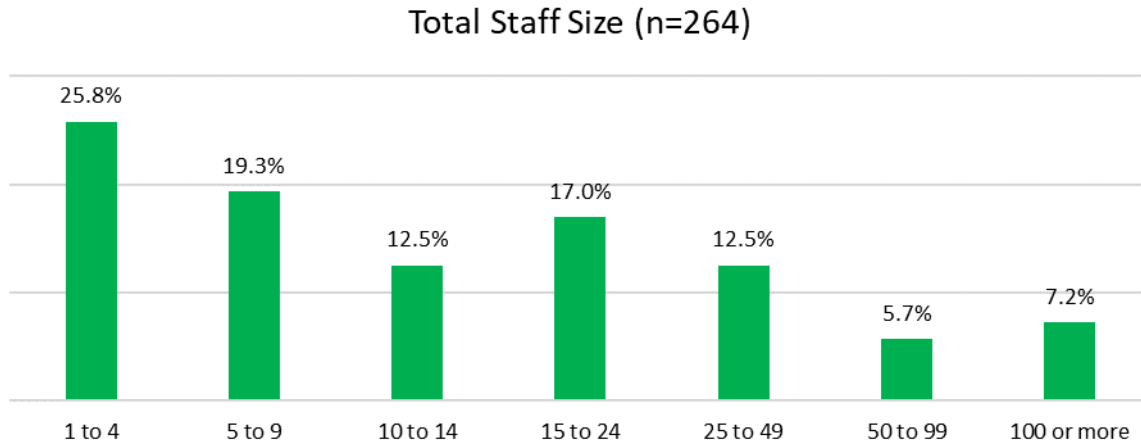
Nearly half (45.4%) of organizations have a national scope, where a quarter (25.0%) have an international scope and lastly, one in five (20.8%) work on the state level.



The data in this report are final.

Q: What is your total staff size (excluding contractors and consultants)?

More than two in five (45.1%) organizations have up to 9 staff members. Less than one in 10 (7.2%) have more than 100 staff members.



The data in this report are final.

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Section 7: Appendix

Definitions (Ranking Questions):

- Overall Rank is assigned by the Score.
- Rank Distribution is a diverging stacked bar where a shade is assigned to each possible
- Score is a weighted calculation. Items ranked first are given a higher value or "weight." The score is computed for each answer option, then summed.
- No. of Rankings is the number of respondents that ranked that item.

The data in this report are final.

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