



The State of Association Marketing

Industry Trend Report 2020



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2020 was marked by drastic changes in the association world. Many teams were downsized, budgets were cut, events were canceled, sponsors dropped off. But positive changes happened also. We saw many associations host their first virtual event, launch new programs, and (finally) implement new digital marketing and digital sponsorship strategies.

But how much change happened, exactly? How did marketing focus and investment shift in the absence of live events? Which marketing channels became more or less important to associations? How have the experiences of 2020 influenced plans for 2021?

*To find out, we put together an industry survey, *The State of Association Marketing*, and promoted it throughout the final weeks of 2020. More than 375 association professionals from organizations of all sizes responded.*

This report presents their responses to a series of questions exploring their digital marketing strategies and budgets, their results in 2020, and their plans for 2021.

ABOUT THE SURVEY

The survey consisted of 12 main questions, some of which included multiple parts. Most were presented as multiple choice or rating scale questions; however we also included some free response sections to try to capture the full picture of what respondents are doing and to obtain insights into practices and trends that we might not have been aware of yet.

We promoted the survey through Feathr's social media and email channels, and incentivized respondents by offering a \$250 Amazon gift card to a randomly selected winner.

Summary of Survey Insights

If you glean only one thing from this report, let it be the following: the pandemic forced associations to put their trust and marketing dollars into digital channels - and the results were so positive that associations are moving further in this direction in 2021.

In addition to investing more in digital marketing channels and tech, associations are also putting more focus on non-live-event initiatives like virtual events, online education, membership, and professional community/networking. These changes stem largely from associations being forcibly pulled out of the vulnerable situation many of them were in until early 2020 (i.e. relying mostly or entirely on in-person events to drive revenue) and realizing the need to diversify how they deliver value and reach their members, sponsors, and industries.

Here are some clear trends the data showed:

- Despite expecting live events to resume in some form in 2021, associations plan to invest even more effort in virtual events, which suggests the virtual event “experiment” of 2020 was successful.
- Membership, online education, and community building are top priorities for 2021, as association marketers have realized they need to engage members more consistently year-round and outside of events.
- Large associations invest more in digital on the whole, but we’re seeing smaller associations start to invest in the same platforms and channels as their larger peers and competitors.
- Retargeting was the channel that most associations implemented for the first time in 2020 or plan to implement for the first time in 2021, as they look for ways to reach audiences that are spending record amounts of time online.

Overall the data showed that associations are truly buying into digital, and those that invest in digital in one year seem to invest even more in the following year. And when do marketers decide to invest more in specific programs and channels? *When they work.*

Digital marketing is cheaper and generally more effective than traditional alternatives. Associations realize this almost as soon as they invest in digital marketing - and subsequently shift even more of their budget from traditional marketing channels to digital ones.

If you were waiting for association-industry-specific data to validate this trend, you’ve got it right here in this report.

The time to go all-in on digital marketing is now.

About the respondents

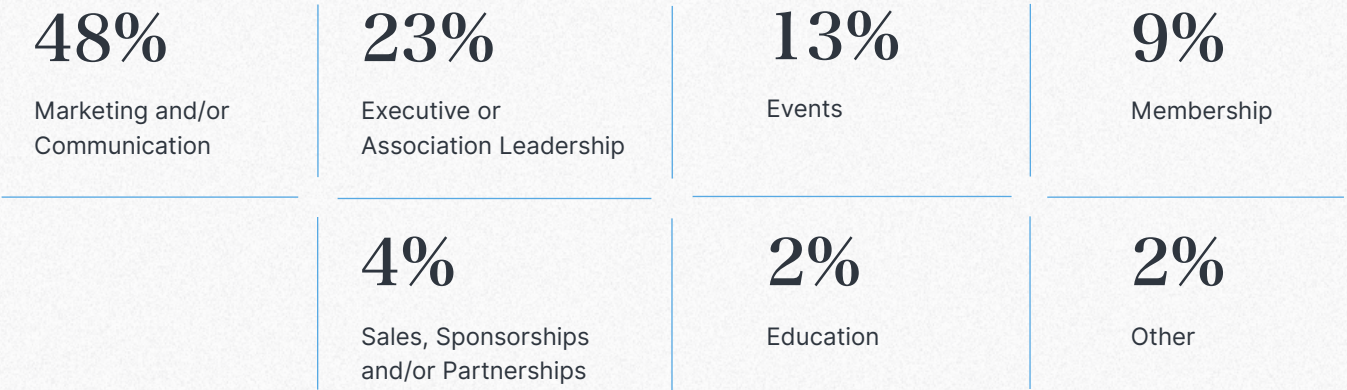
The survey included several questions about respondents’ titles and the size of their organizations and member bases to provide a more nuanced look at how these factors might affect priorities, strategies, and results.

In almost any industry, organization size typically impacts the ability to afford and leverage technology. Associations know this better than anyone. Understaffed teams and limited budgets are familiar challenges for even some of the largest associations and have been a major factor in the industry falling behind when it comes to digital marketing (accompanied by other huge factors like risk aversion and outdated marketing approaches - more on that later).

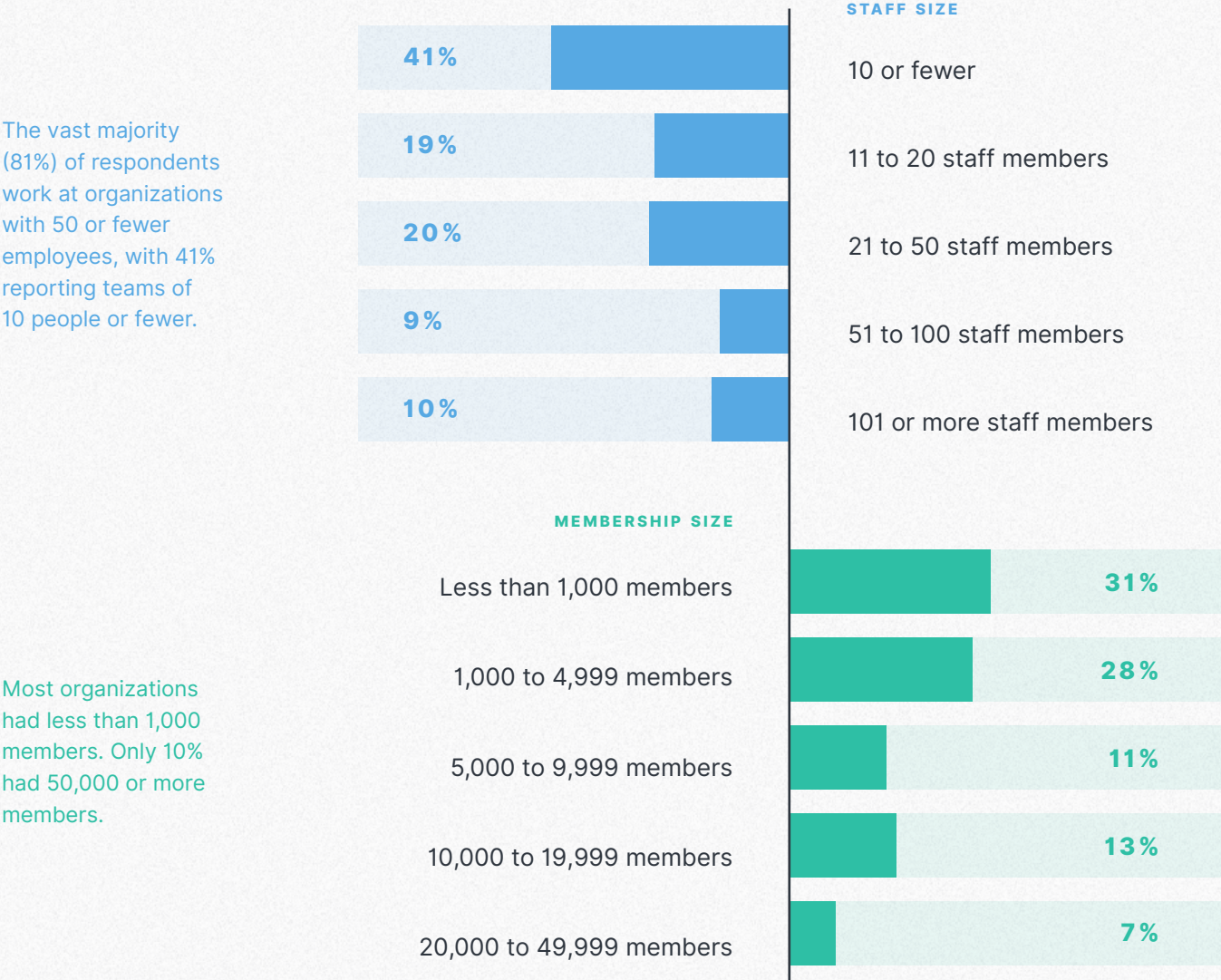
But there’s no doubt that smaller associations often feel less empowered to implement new marketing practices and technologies, so it’s important to account for this when investigating the use of digital marketing software among associations.

Throughout this report we’ll highlight ways that association size affected how respondents answered key questions.

I. RESPONDENT TITLES & ROLES



II. ORGANIZATION BREAKDOWN



QUESTION ONE

What were your top marketing initiatives and priorities in 2020?

Virtual events were the most important initiative in 2020, with 65% of respondents calling it a top priority. This comes as almost no surprise considering how many associations were forced to pivot to virtual after the pandemic led to widespread event cancellation.

Membership initiatives came in second, with 51% of respondents rating it a top priority. Though associations still cared about keeping event programs running in 2020, they also saw new opportunities to focus on membership engagement and retention.

As for **online education**, 45% of respondents said this was a top priority.

Despite not being able to gather at live events, associations made sure to continue delivering the education their members expect from them in other forms including webinars, panels, certificate programs.

Live events were largely deprioritized in 2020 due to obvious reasons, but 15% still called them a top priority. This could be because associations still consider live events a critical initiative in principle and are banking on things returning to normal soon. Or perhaps some associations were still strategizing and planning for live events in 2020, even if they weren't expecting to pull them off until 2021.



ADDITIONAL FINDINGS

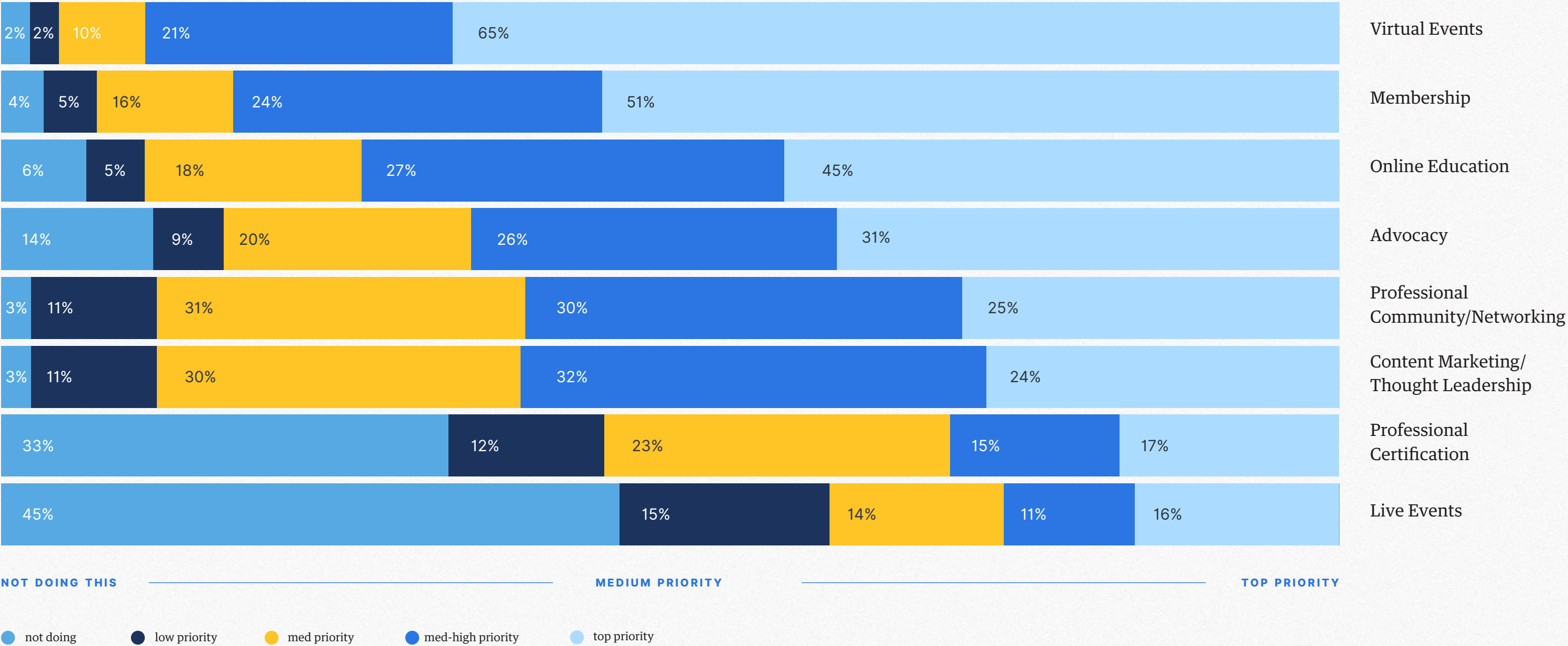
We included a free response option for respondents to tell us about other focus areas outside of the options we listed. These are some of the trends.

Covid-related support

Many respondents helped their members and industries at large to navigate the challenges of the pandemic. Some focused on thought leadership around the importance of coming together, while some compiled and shared data on the impact of Covid-19 on their specific industries.

Diversity and Inclusion

Despite the chaos of the pandemic, 2020 was a year of tremendous social change, with many respondents developing programs that prioritize diversity and inclusion. Responses also revealed a new and heavier focus on community building and volunteer programs.



** The top three priorities for association professionals in 2020 were virtual events, membership, and online education.*

/// THE TAKE AWAY

As further questions and responses will show, this digitization trend is not just in the area of products and programs. 2020 seems to have been the year that revealed the absolutely critical need for associations to digitize not only their products and programs – but their communications, marketing, and sponsorship strategies as well.

QUESTION TWO

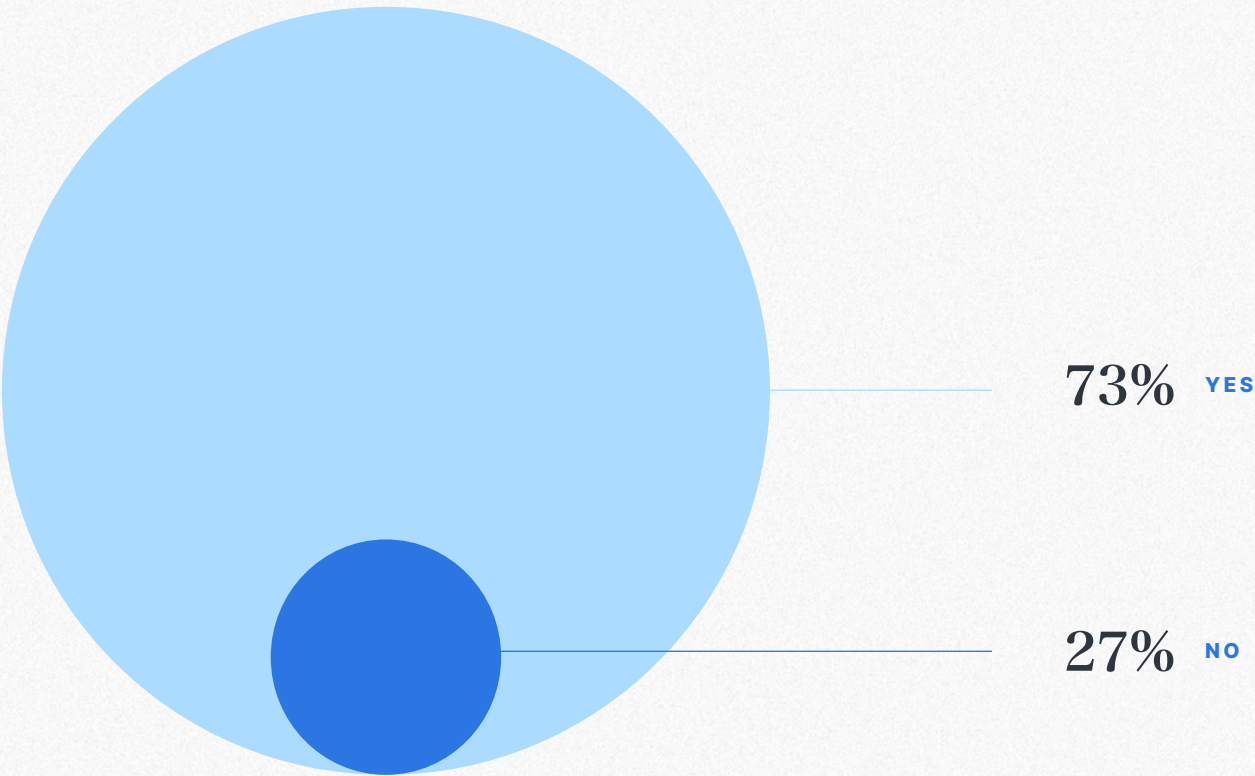
Do you expect your marketing efforts to be distributed differently in 2021?

2020 was a year of great change, and the majority of survey respondents expect 2021 to be another year of change - at least in terms of marketing. The transition to 2021 is marked by the [anticipated re-emergence of live events](#). Many expect to be able to re-invest marketing time and resources into live events, which would be a major change from 2020.

It's worth noting that most associations made significant changes in the distribution of their marketing efforts and investments during 2020, and that this could largely explain why some respondents said they don't expect to make changes in 2021. Despite a clear line of sight to live events being feasible again, at least in some form, 27% of respondents do not expect to change their 2021 marketing investments to account for this.

For some, this might be a result of feeling cautious about relying on a swift return of live events. For many others, however, it seems to be because the forced virtualization of programs and marketing in 2020 has been so successful that there isn't overwhelming pressure to revert back to pre-pandemic overreliance on live events.

Either way, one thing is clear: associations know they can't solely rely on live events to sustain them and their members. As the following sections show, association professionals are also expecting to invest even more marketing resources into non-live-event programs - like virtual events, membership, and professional education.



/// THE TAKE AWAY

Buckle up for another year of change, and we don't mean "changing" back to pre-pandemic mode once live events are back in full swing.

As you'll see in the following sections, associations are planning to keep moving heavily toward digital to support their promotions and communications - upgrading their marketing tech stack, focusing on virtual options and non-event programs, and shifting more budget toward the right digital channels.

QUESTION THREE

Compared to 2020, how do you plan to prioritize marketing initiatives in 2021?

Attracting and retaining members are top priorities for 2021, with 69% of respondents saying they plan to put more effort into membership than they did in 2021. Without live events stealing away so much focus, association marketers have realized they need new ways to reach and engage members year-round.

Despite expecting live events to resume in some form in 2021, 66% of respondents said they plan to invest even more effort in **virtual events**. This is noteworthy, since it suggests that the virtual event “experiment” in 2020 was successful enough for most associations to feel they should continue investing in this direction.

Professional community and networking related initiatives came in third, with 60% of respondents indicating that they planned to make this more of a focus. This was a significant jump from 2020, when only 25% of respondents considered professional community/networking to be a top priority. There’s no doubt that the physical distance created by COVID-19 has caused us to look for alternative ways to connect, and as we discussed earlier, multiple other factors in 2020 led to a greater emphasis on togetherness and community-building.

The pandemic also highlighted the importance of having **digital education options for members** - for

times of crisis and for the future in general - and associations seem to be taking note of this.

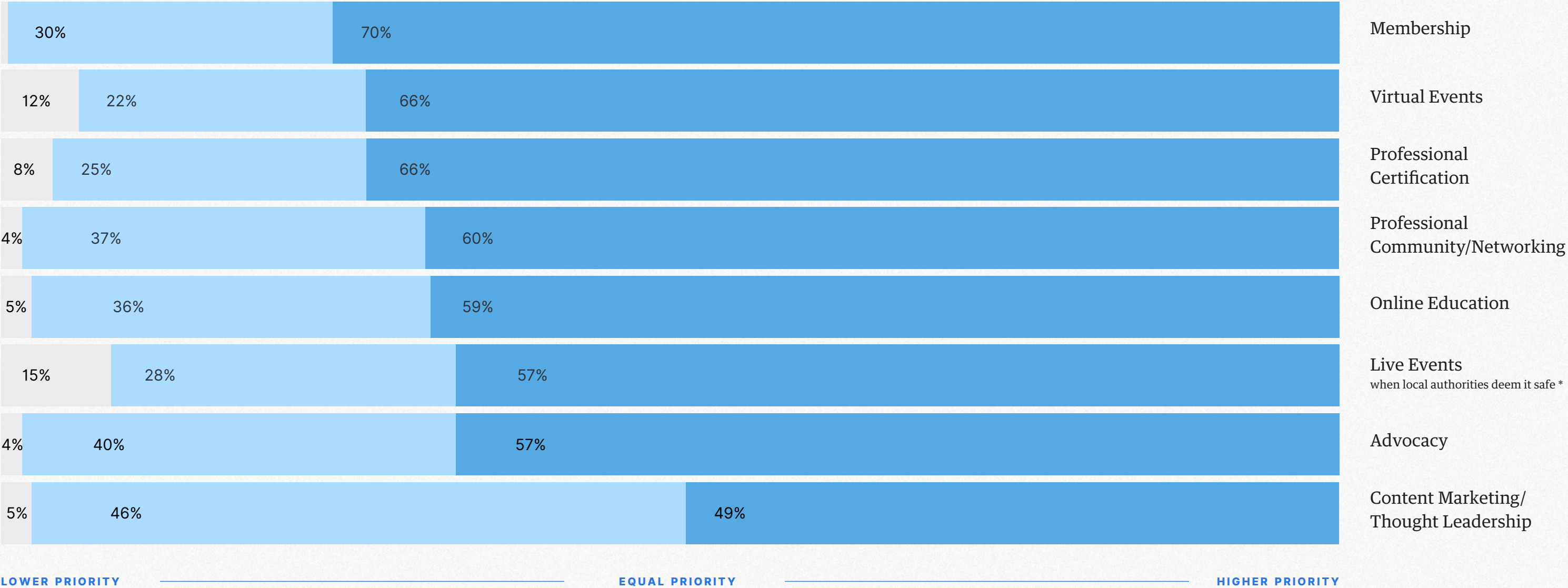
A few are even developing new programs to incentivize members to engage with their educational materials and to make access easier.

Examples of these programs include:

- On-demand courses that members can take at their own pace
- New mentorship program
- Platform/s that simplify subscription to virtual events and content
- Member engagement point system program that rewards member activity



** The top three initiatives that associations plan to focus on in 2021 are membership, virtual events, and professional certification.*



/// THE TAKE AWAY

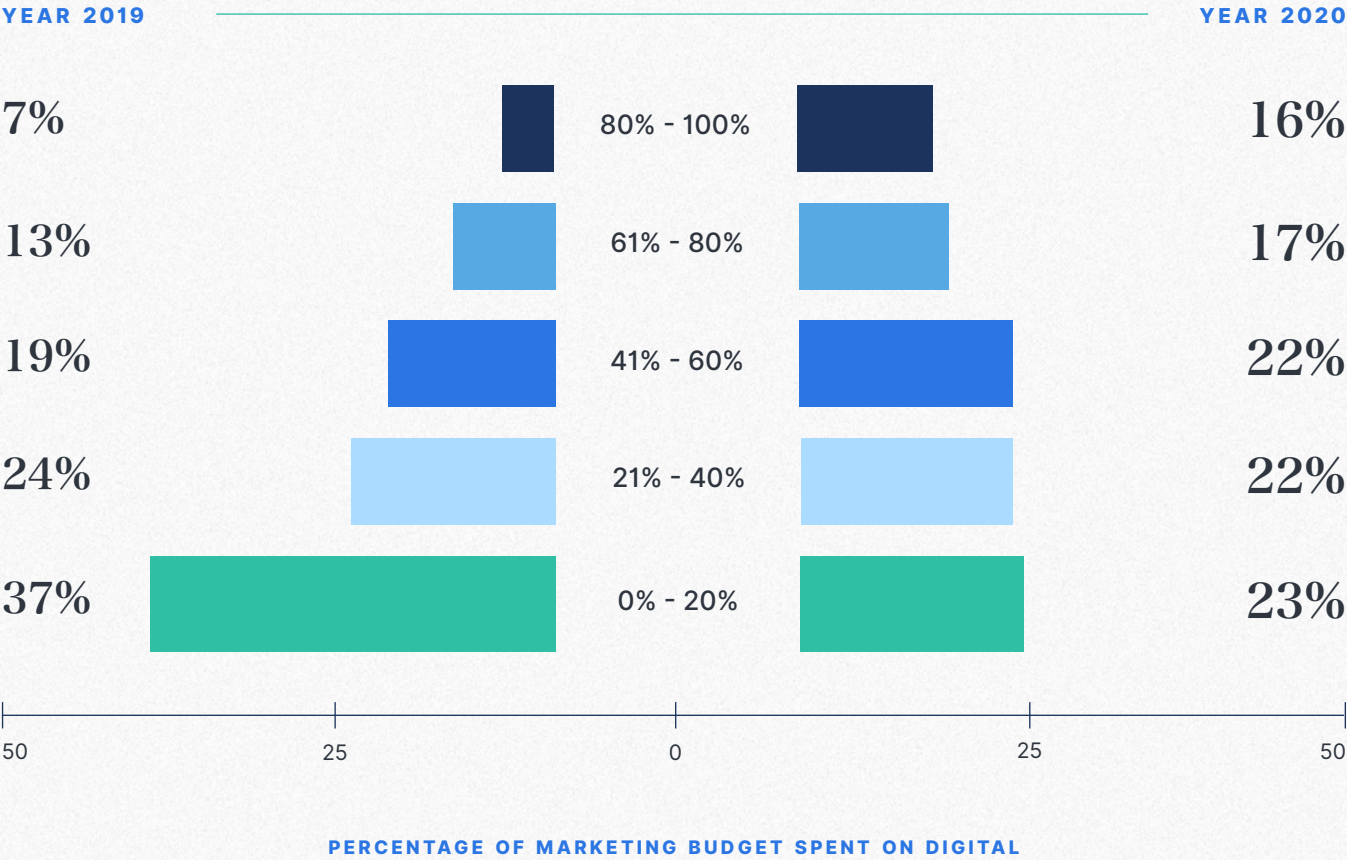
These further investments in virtual events, online education, membership, and professional community/networking at least partially stem from associations being forcibly pulled out of the vulnerable, outdated situation they were in until 2020 – relying mostly or wholly on their big yearly meetings to support their operations – and realizing the preeminent need to digitize and diversify the value they offer to their members and industries.

Whatever you do, please do not think of digital simply as a band-aid to hold us over until live events return. Even in a world where live events are feasible again, digital options can deliver even more value and revenue than traditional ones – plus they protect against the myriad ways that a live event could be compromised.



Digital Marketing Budget Trends

How much of your marketing budget was spent on digital in 2019 and 2020?



QUESTION FOUR

How do you expect your digital marketing budget to change in 2021?

53% of respondents expect to further increase their investment in digital marketing in 2021, even though investment grew notably from 2019 to 2020. Though many associations are still catching up when it comes to investment in digital marketing tech, there were some promising trends in the data.

- Between 2019 and 2020, the percentage of associations that invested more than 40% of their budget in digital grew from 39% to 60%.
- Specifically the cohort of associations that invest 80-100% of their budget in digital more than doubled, growing from 8% to 17%.
- Increasingly fewer associations are spending a small minority of their budget on digital. Between 2019 and 2020, the percentage of associations that invested less than 20% decreased by 14%, dropping from 37% to 23%.

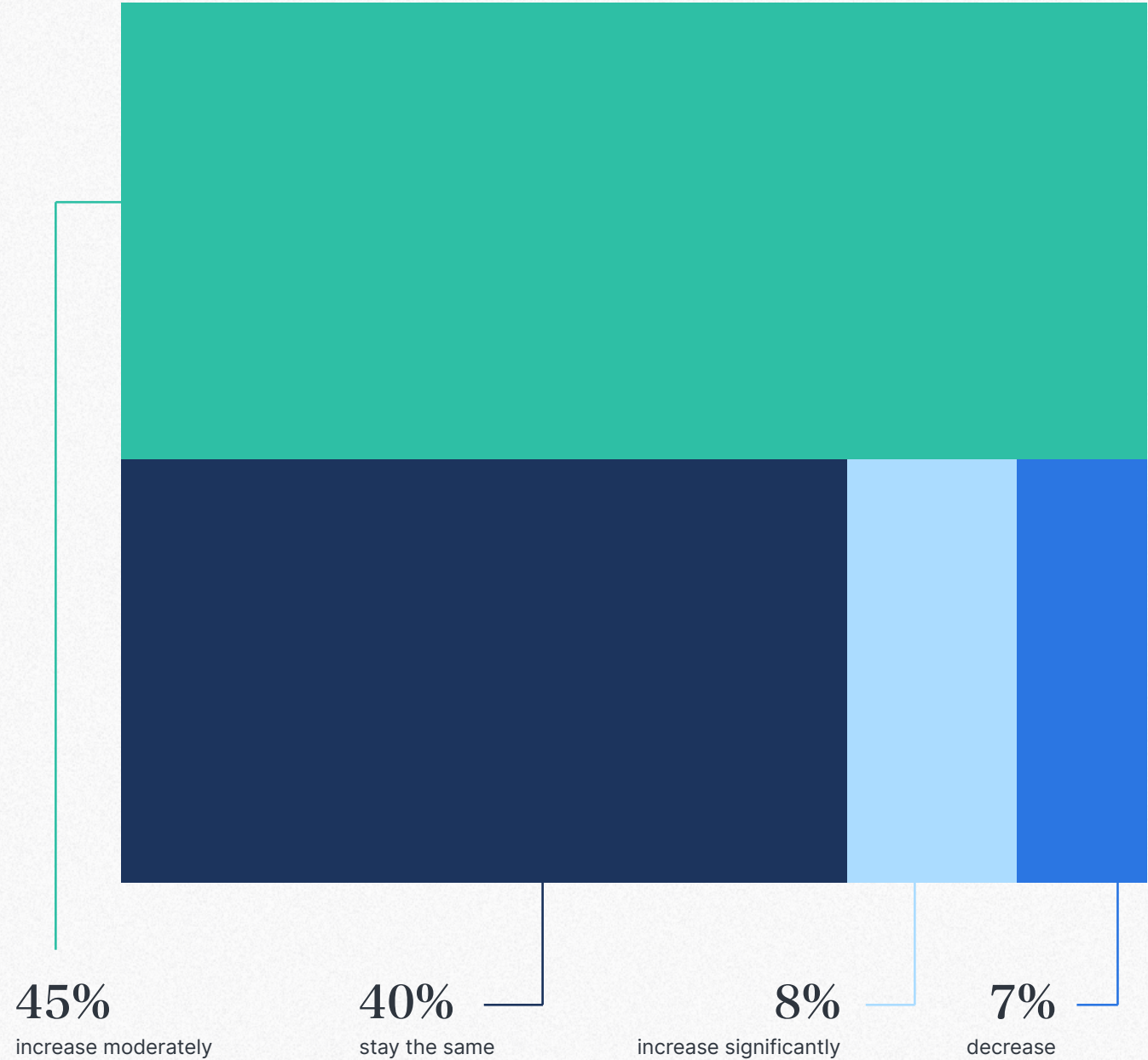
While it’s unclear by how much each respondent in each cohort increased their investment, it seems that associations that were already investing higher portions of their marketing budgets

in digital are continuing to increase their investment, and associations that were not investing much in digital are beginning to invest more.

It is worth noting that “large” associations (more than 20 staff members) invested more of their budget in digital. Only 32% of small associations spent more than 40% on digital in 2019, while 49% of large associations spent more than 40%.

Additionally, only 27% of large associations spent 20% or less of their budget on digital in 2019, compared with 44% of small associations that invested the same.

Similar patterns were visible in 2020, with large associations investing more on average in digital. Large associations also plan to increase their digital budgets in 2021 at higher rates than small associations, with 63% of large associations planning to increase their digital spend compared with 47% of small associations.



/// THE TAKE AWAY

More and more associations are investing in digital, and those that invest in digital in one year seem to invest even more the next year. This is because these channels are working.

Digital marketing is cheaper and more effective than traditional alternatives, and those who invest in digital marketing usually realize this pretty immediately – leading them to shift even more budget from traditional marketing channels to digital ones.

QUESTION FIVE

What marketing channels did you implement for the first time in 2020?

Many respondents said their associations were already using all of these channels prior to 2020 (this is what we like to hear!). Often due to risk aversion and status-quo thinking patterns, associations can fall behind when it comes to digital marketing, so it's great news for the industry that so many are already using these channels.

In particular, [ad retargeting](#) has clearly proven itself in 2020. We found that organization size did not impact the desire to prioritize retargeting - it was the channel that most respondents implemented for the first time in 2020, across both small and large associations.

It is likely that the nature of this channel made it an appealing one to adopt in 2020 regardless of organization size. Ad retargeting helps you track your website visitors and other digital audience members so you can show ads to them wherever they go online. So as people spent more time than ever online during the pandemic and related lockdowns,

association marketers saw the opportunity to capitalize on that trend, and ad retargeting was the way to do it.

We did see a higher percentage of smaller associations implementing retargeting for the first time in 2020. The somewhat forced shift toward digital might have led some small associations to get on board with retargeting in ways they hadn't before - or even learn about it for the first time. Since large associations tend to invest more in digital to begin with, a higher percentage of that cohort was likely already using retargeting.

[Email marketing](#) was already in place for most (92% of survey respondents ranked it as important or extremely important to their marketing efforts in another question). The 33 respondents that implemented email for the first time in 2020 might be smaller associations that had previously relied primarily on telemarketing, snail mail, or other traditional marketing channels that became less viable due to the pandemic.



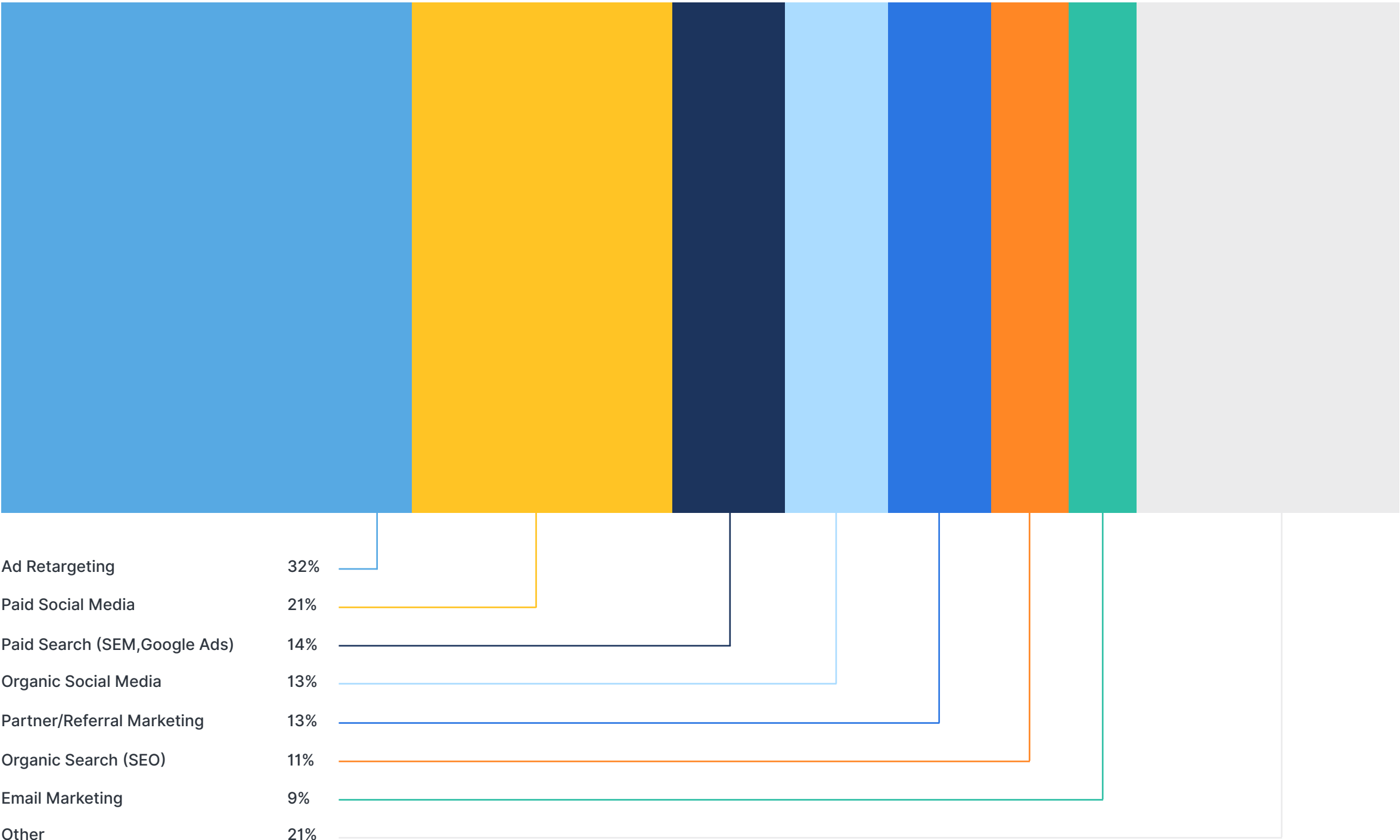
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With retargeting, I have the ability to place ads next to where some of the largest brands in the world place their ads. That's something that was never afforded to small marketing teams before.

- Paul Kissin

Director of Marketing,
[National Confectioners Association \(NCA\)](#)

** 32% of respondents implemented ad retargeting for the first time in 2020, making it the most popular new channel for associations.*



/// THE TAKE AWAY

If you still aren't using ad retargeting as one of your primary marketing channels, consider this your cue to get started now. 2020 has made us aware of so many ways to conduct business virtually, and as more operations move online, that's where people will be spending even more of their time. Ad retargeting lets you capitalize on this fact and reach your audience members much more efficiently

Also, if you've avoided digitizing because your association is small, that excuse won't fly anymore. Associations of all sizes are prioritizing digital – particularly ad retargeting – because it's quickly becoming impossible to survive without.

QUESTION SIX

What marketing channels are you considering or planning to implement for the first time in 2021?

[Ad retargeting](#) is reigning champ - for the second year in a row, it is forecasted to be the top channel associations will implement for the first time.

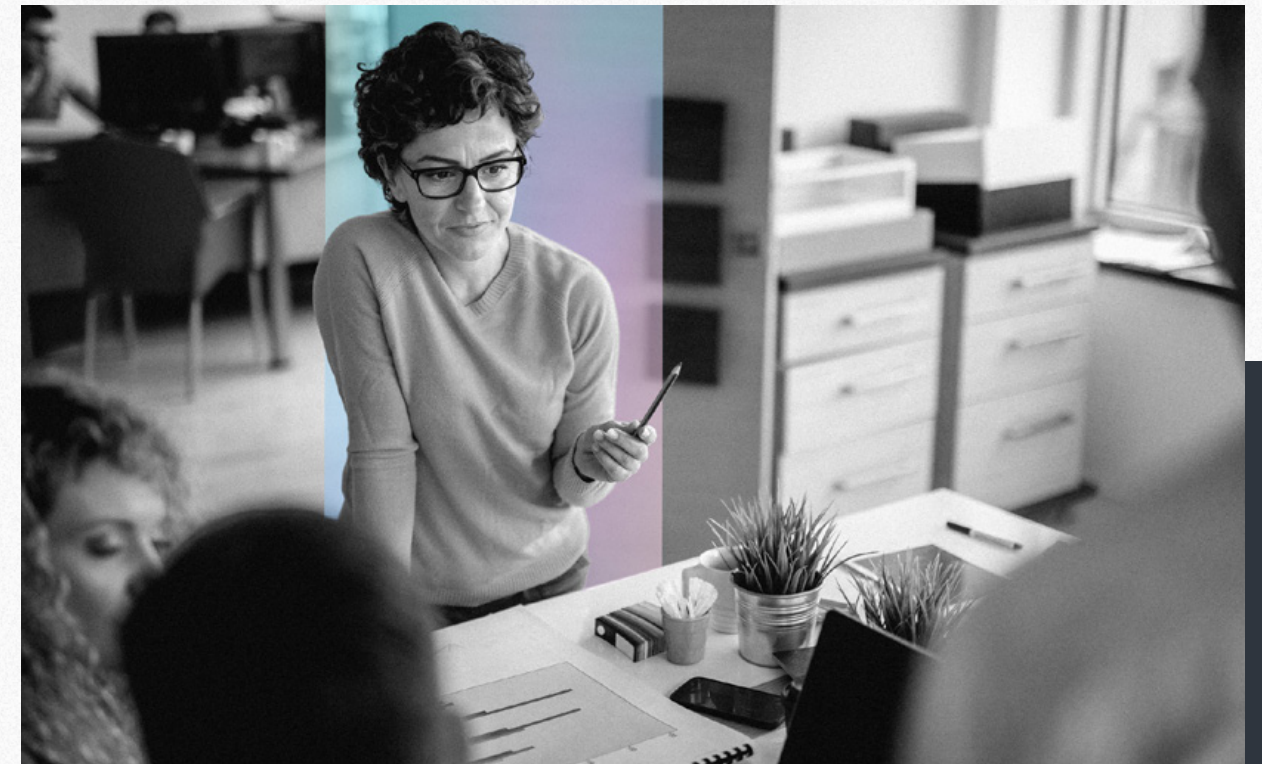
However, when we control for organization size, [paid social](#) skyrockets for small associations, landing just above retargeting in terms of planned adoption rates for 2021. 16% of small associations are considering or planning to implement paid social for the first time in 2021, compared with only 7% of larger associations.

This can probably be explained again by the fact that many large associations are already using digital channels like

paid social, while smaller associations are still getting caught up with digital advertising.

Another noteworthy trend is that 15% of small associations said they are implementing a [referral marketing channel](#) for the first time in 2021, making it the third-highest priority just after paid social and retargeting.

Only 7% of large associations said they would be implementing a referral marketing channel in 2021, which could mean that many of them already have one or that they need this channel less than smaller associations.



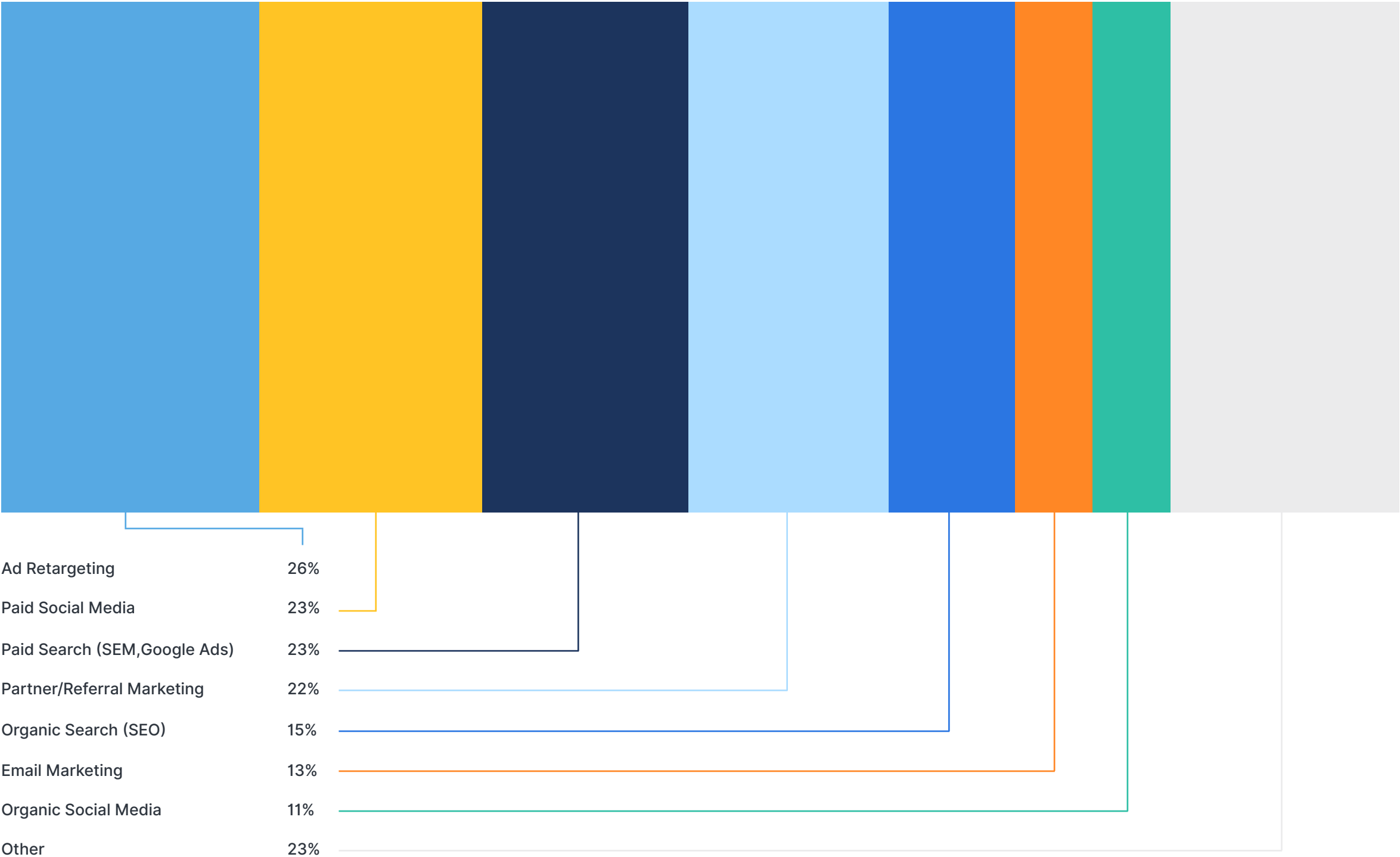
Smaller associations with smaller marketing budgets are typically more eager to implement low-cost marketing channels, even if they are more time-consuming to set up and manage. Referral marketing is a good example of that - higher-cost in terms of time and energy, but very affordable compared to other digital marketing channels.

Once again, many respondents said they were already using all of these channels - though it's worth noting that a number of them might have adopted some channels for the first time in 2020. Many also said their next step is to reallocate existing resources and budget to maximize the results of the channels and platforms they're already using.

/// THE TAKE AWAY

Take advantage of the growing opportunities to capture your members, attendees, subscribers, and others where they already are - browsing the Internet - with the help of channels like retargeting and paid social.

Your audience members are accustomed to seeing targeted ads, so don't let any outdated notions about online advertising stop you from delivering value in new ways. Plus your peers and competitors are probably already doing these things (if not, they should be!), so don't get left behind.



** The top two channels associations expect to implement for the first time in 2021 are ad retargeting and paid social.*

/// THE TAKE AWAY

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QUESTION SEVEN

Overall how would you say the pandemic has shifted your strategic marketing priorities?

The need to pivot to virtual was the most impactful change for associations in 2020. As we discussed earlier, associations are indicating that they will continue to [invest in virtual event marketing](#) despite knowing that live events will eventually resume. Only time will tell if this pivot to virtual is long-term, but it does seem consistent with the general shift associations are making toward prioritizing digital approaches to content, member experiences, marketing, and sponsorships.

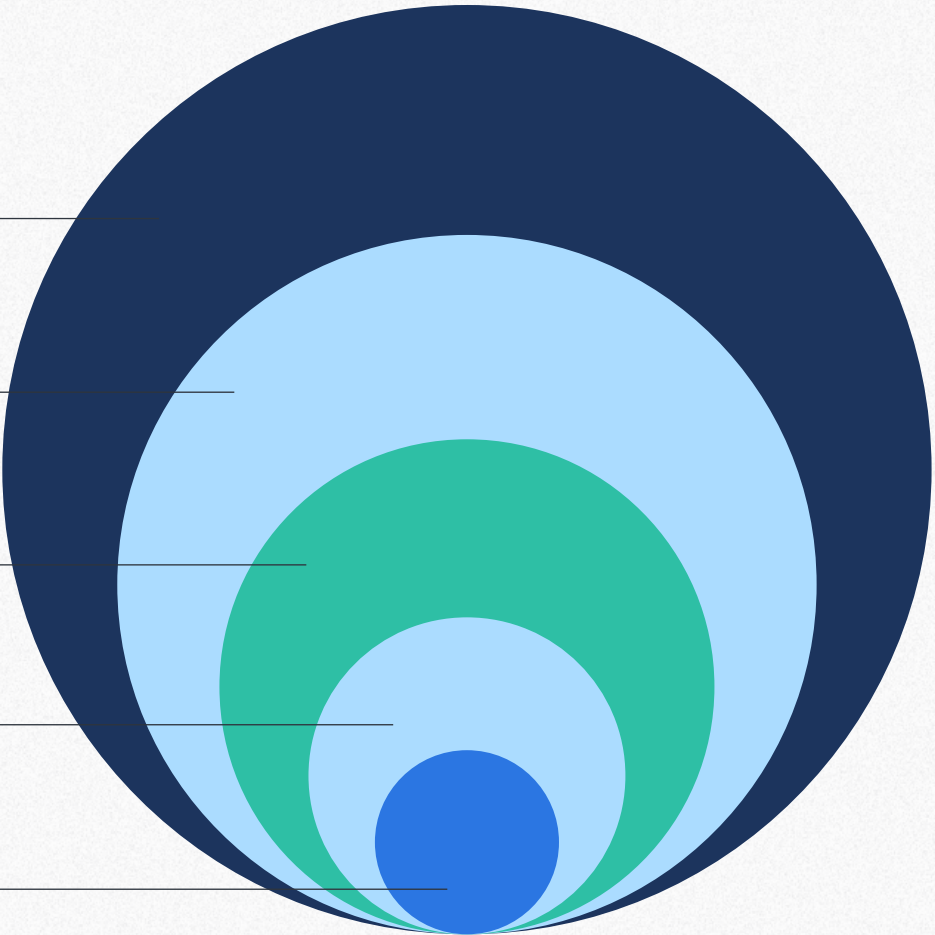
Further evidence of this shift is the fact that 50% of respondents said the pandemic has caused them to invest further in digital. As we’ve seen, many respondents said they [implemented key digital channels for the first time in 2020](#) or are planning to in 2021, including ad retargeting, paid social, paid search, digitized referral marketing, and even organic search and organic social in some cases.

“

Digital marketing is even more important now because most of our personal and professional lives are centered around a device. We’re conducting life online now, and retargeting has helped us meet our members (and potential members) where they are – online.

- Simona Witherspoon Marcellus
Director of Marketing, [Technical Association of the Pulp and Paper Industry \(TAPPI\)](#)

- 81%
pivot to virtual event marketing
- 50%
invest further in digital
- 29%
focus on content/thought leadership
- 28%
invest in non-event programs
- 17%
consolidate marketing technology



/// THE TAKE AWAY

It’s unfortunate that it took something as extreme as a global pandemic to create these shifts in prioritization. For at least a decade, digital marketing has clearly been the way ahead for all industries, including associations. But we say better late than never.

Take a page out of the 2020 survival guide and don’t let your association fall back on outdated practices. Trust in the proven results of investing in digital and offering virtual options, and your association will be able to carry out its mission more effectively for years to come.

Although the pandemic introduced many new struggles and challenges for associations, it's safe to say the industry has come out on top. Prior to 2020, many associations depended almost entirely on live events to support their operations - sometimes with just one main event keeping them afloat.

The effects of the pandemic not only proved that this is a very risky position to be in, since an in-person event is subject to cancellation, but also made associations aware of all of the ways they can (and must) be working to reach their audiences online.

While there's no doubt that live events will resume in the near future, 2020 will have a lasting impact on what audiences expect from organizations moving forward.

People are more aware than ever of their time - and the value of it - and it's up to associations to continue to actively engage members, attendees, sponsors, subscribers and more with digital and virtual offerings that meet all of their needs.

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The dynamics created by the pandemic have only highlighted how important associations are to their respective communities. As the storm of shut-downs, regulations, and economic changes have ebbed and flowed, associations have worked harder than ever to continue offering value and guidance to their members, partners, and each other.

- Aleksander Levental
CEO, **Feathr**



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Feathr has helped more than 800 associations and event organizers modernize their marketing. Our programmatic advertising tools combined with our custom services help organizations around the world reach their audiences online to promote virtual meetings, conferences and trade shows, increase membership engagement and retention, and drive net-new digital sponsorship revenue.

Book a personalized demo to see how Feathr's suite of digital marketing tools can ensure your association is ready for anything 2021 throws our way.

BOOK A DEMO

