



STATE OF ASSOCIATION
MEMBER EXPERIENCE:
MEMBERS AS DISRUPTORS

2023 REPORT

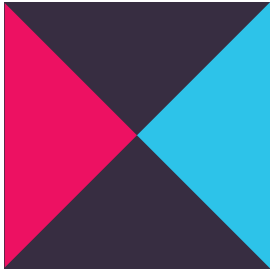


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THE STATE OF MX: MEMBERS AS DISRUPTORS

In a fast-paced world, an association's success depends on its ability to meet the needs of members at every stage of their careers. And as the expectations of today's professionals evolve and accelerate, members are creating radical disruption that begs association leaders to reimagine their member experience (MX) strategies.

Forj surveyed more than 1,000 members of associations to better understand their expectations of the associations they belong to and how well those organizations are keeping pace.

Elevating MX requires vision, focus, and commitment. With a deep understanding of members' traits, behaviors, and beliefs, you can unlock your association's full potential. The third annual State of Member Experience report offers comparisons from prior-year data and delivers actionable intelligence to help association leaders grow membership, increase retention, and boost non-dues revenue.





IN THIS REPORT

Forj surveyed more than 1,000 association members from across the U.S. in the summer of 2023. Respondents were professionals in various industries and in the early, mid, or late stages of their careers. The findings summarized here will help association leaders understand their members' experience and expectations today and in the future.

In this report, you'll find:



DATA ON MEMBER EXPECTATIONS

and how evolving needs and desires can influence MX strategy



MEMBER SATISFACTION BENCHMARKS

and insights on where to invest to elevate MX



ACTIONABLE INTELLIGENCE

to advance your MX journey



KEY INSIGHTS

1 MEMBER SATISFACTION IS MIXED

As member expectations evolve, association leaders are working hard to keep pace. Members appear to be moderately satisfied with the value they receive from their membership, but unsure if their associations can continue to meet their needs. This year, we took a deep dive into member loyalty by assessing NPS, satisfaction, and likelihood to renew.

The responses suggest room for improvement, which may be a wake-up call to **revisit your value proposition and reimagine your MX strategy.**

2 BOTH ACQUISITION AND RETENTION MATTER

It's not uncommon for organizations to direct a lot of energy towards member acquisition. After all, new member growth is an important measure of an association's success. But like last year, insights emerged in this year's report that suggest member retention is at risk.

Member experience extends across a member's entire journey, which demonstrates that **both acquisition and retention deserve equal focus.**



3 COMMUNITY AND LEARNING ARE KEY DRIVERS OF ENGAGEMENT

When we explored members' priorities and goals last year, it was clear they had a strong desire for community. This year, education joined community at the top of the list when members expressed their reasons for joining and staying with their associations.

Community-building and education are inherent to the value associations provide, and **optimizing opportunities for members to connect and learn will help you accelerate growth and stem churn.**

4 THERE ARE STILL OPPORTUNITIES TO SIMPLIFY THE EXPERIENCE

Advances in technology have sent member expectations soaring. This year, members called out some of the usual sources of frustration, such as outdated platforms, lack of intuitive navigation, and too many tools.

Delivering value requires reducing frustration and—even more importantly—delivering a dynamic experience. **Technology plays a critical role in community and learning.**

5 INTUITIVE MEMBER EXPERIENCE IS KEY TO BOOSTING NON-DUES REVENUE

Last year's survey discovered that many members are willing to pay more for an elevated experience. This year, members who reported they often pay for additional content and experiences beyond their dues were also likely to say their association is easiest to do business with.

A member's perception of ease of doing business may vary by their career stage and industry, but one thing is clear: **failing to build a simple, intuitive member experience may mean you're leaving revenue on the table.**

SUMMING UP MEMBER SATISFACTION

Over the past several years, association leaders have worked hard to meet member expectations. Are their efforts paying off? The results look mixed.

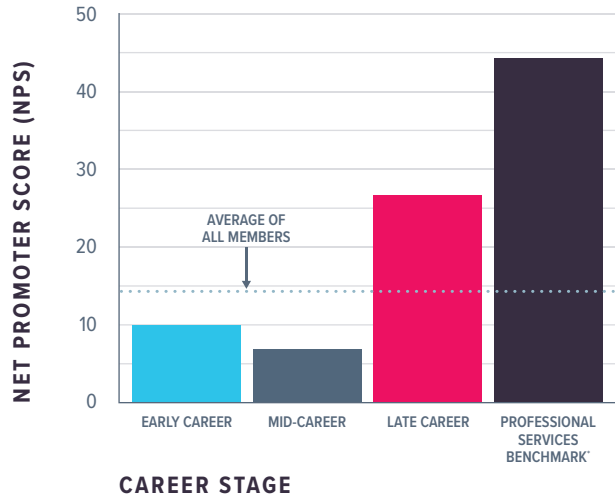
This year, we took a deep dive into member loyalty by assessing Net Promoter Score (NPS), satisfaction, and likelihood to renew. The responses suggest room for improvement, which may be a wake-up call for associations to revisit their value propositions and reimagine their MX strategies.

Member Satisfaction is Mixed

Responses to the survey revealed that associations are struggling to delight members, particularly those in the early and mid-stages of their careers.

We assessed member loyalty by measuring NPS** and examined responses by career stage.*** The results show mid-career members are the least satisfied with their association and late career members are the most satisfied. Early career members are closer to mid-career NPS levels than to late career.

The mid-career member NPS is concerning. The number is close to negative, suggesting these members are most at-risk for leaving or lapsing their membership.



* Gitlin, Jon. "What is a good Net Promoter Score? And how does it vary across industries?" SurveyMonkey.com, 2023.

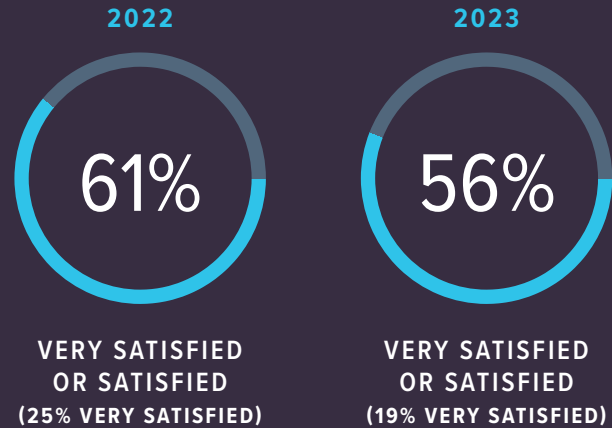
** NPS is calculated by asking respondents to rate their satisfaction with their association on a scale of 1 to 10. A respondent who selects 9 or 10 is a promoter; a respondent who selects less than 7 is a detractor; and a respondent who selects 7 or 8 is a passive. To calculate NPS, we found the percentage of promoters among all respondents and subtracted the percentage of detractors among the overall population, then dropped the percent sign.

*** In our survey, early career members identified as having less than 5 years of experience, mid-career members as having 6-25 years of experience, and late career members as having more than 25 years of experience.

Last year's State of MX survey showed that a slight majority of members were satisfied with the value they receive for the membership dues they pay. But based on their reported likelihood to renew, many were on the fence about their associations' ability to continue delivering value.

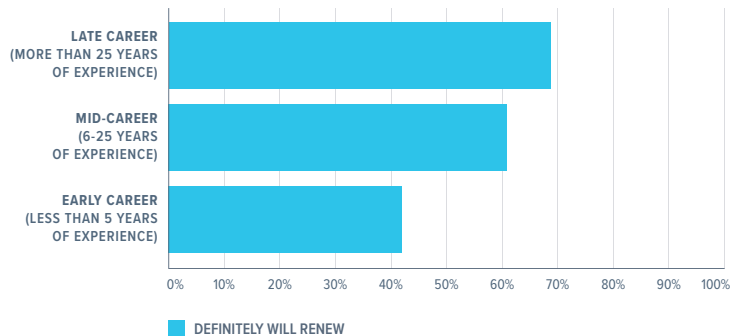
This year, we discovered a **decline** in bottom-line member satisfaction compared to last year.

HOW SATISFIED ARE YOU WITH THE VALUE YOU RECEIVE FOR YOUR MONTHLY/ANNUAL MEMBERSHIP DUES OR FEES?



When we broke down the results by career stage, we discovered that early career members report they are less likely to renew their membership, despite reporting slightly higher satisfaction than mid-career members. This trend is consistent with our 2022 findings.

HOW LIKELY ARE YOU TO RENEW YOUR MEMBERSHIP WITH YOUR PROFESSIONAL ORGANIZATION?





There are a lot of reasons early career members may not renew their association membership. They likely make less money than their mid- and late career counterparts, and therefore are more careful about discretionary spending. They may also be less stable in their careers, making it more likely they'll switch associations as their paths unfold.

While these factors seem to be outside of an association's control, there are creative strategies to counter the effects. Consider implementing a plan for increasing the value you provide to early career members relative to their dues, potentially including:

- Differentiated early career membership rates
- Networking opportunities that connect early career members to mid- and late career members
- Targeted learning offerings
- Resources that support early career members in charting their career path in your association's field or industry



INSIGHT: EARLY CAREER MEMBERS ARE LEAST LIKELY TO RENEW

More than ever, associations must cultivate a strong perception of value to drive member retention and continued loyalty. Delivering an experience that matches members' priorities and helps them to meet their goals—at each stage of their career journey—may be the key to combating member churn.

ACQUISITION AND RETENTION

It's not uncommon for organizations to direct a lot of energy and investment towards acquisition. No one will dispute that new member growth is an important measure of an association's success. But like last year, insights emerged in this year's report that suggest member retention is at risk.

Member experience extends across a member's entire journey, which demonstrates that both acquisition and retention deserve equal focus.

We explored the factors affecting members' decision-making by asking survey respondents to indicate their primary reason for joining their association and their primary reason for staying.



INSIGHT: MEMBERS JOIN ASSOCIATIONS FOR CONNECTION AND LEARNING.



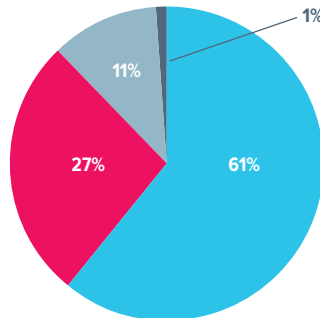
Acquisition: Why Members JOIN

For the second year in a row, the top two reasons members gave for joining associations were “to connect with other members/professionals like me” and “to learn and participate in training or education.”

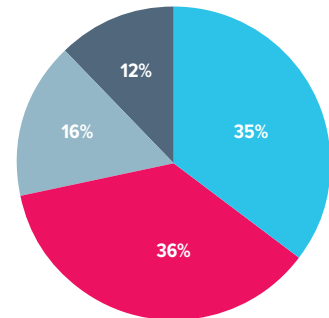
REASONS FOR JOINING

- TO CONNECT WITH OTHER MEMBERS/PROFESSIONALS LIKE ME
- TO LEARN AND PARTICIPATE IN TRAINING OR EDUCATION
- TO GATHER AT IN-PERSON OR VIRTUAL MEETINGS OR EVENTS
- TO SHARE MY KNOWLEDGE/EXPERTISE

EARLY CAREER MEMBERS



MID-CAREER MEMBERS



When we look at the results by career stage, it's clear that early career members are most eager for community connections. Early career members are just establishing themselves in their profession, so it's no surprise they want to join an association to connect with others. If your association is seeking new, first-time members, you may want to lean heavily into community-building as you construct your value proposition.

In contrast to early career members, mid-career members are almost evenly split between connecting and learning as their primary reason for joining an association. Mid-career members may be more secure in their network and therefore slightly less interested in connecting than early career members. They may also be more in need of the specialized, industry-specific learning associations provide.



INSIGHT: MID-CAREER MEMBERS ARE AS LIKELY TO JOIN AN ASSOCIATION FOR LEARNING AS FOR CONNECTIONS.

It's also interesting to note that mid-career members are the most likely to choose "to share my knowledge/expertise" as their reason for joining an association. This may reflect their interest in giving back to their association, which means this is the group you want to tap for volunteer and leadership roles.





Retention: Why Members STAY

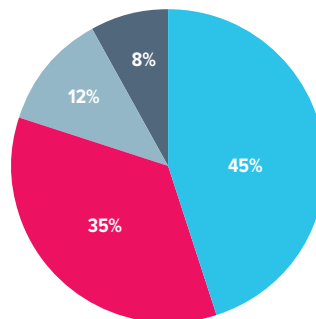
When we asked members why they stay with their association, they pointed to both connecting and learning again. However, learning is slightly more important when members are making the decision to stay.

Mid-career members are most likely to value learning. They care more about learning than early career members, and they care the most about sharing their knowledge and expertise.

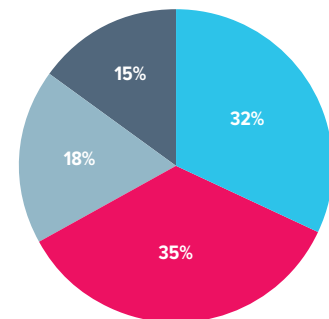
REASONS FOR STAYING

- TO CONNECT WITH OTHER MEMBERS/PROFESSIONALS LIKE ME
- TO LEARN AND PARTICIPATE IN TRAINING OR EDUCATION
- TO GATHER AT IN-PERSON OR VIRTUAL MEETINGS OR EVENTS
- TO SHARE MY KNOWLEDGE/EXPERTISE

EARLY CAREER MEMBERS



MID-CAREER MEMBERS



As you consider where to direct your association's retention efforts, pay particular attention to mid-career members. In contrast to early career members, who may lapse due to factors outside of your control, mid-career members make renewal decisions based on perceived value—something that is firmly within your association's control.

COMMUNITY AND LEARNING

When it comes to members' priorities and goals, their desire for connections and learning is clear. Community-building and education are inherent to the value associations provide, and optimizing opportunities for members to connect and learn will help you accelerate growth and stem churn.

Perhaps it's unsurprising that connecting with others and participating in training and education rank high with members. After all, the two go hand-in-hand: **community-driven learning** is the virtuous cycle within associations in which members come together to share their own knowledge and expertise and to learn from the knowledge and expertise of other members. Community-driven learning fosters a sense of belonging that enhances member engagement, the learning experience, and overall perceptions of value.

Who in your association is best positioned to foster community-driven learning? This year's survey found that mid-career members are the segment most likely to express a desire to share their expertise: more than one in seven mid-career members say they stay in their association primarily to share their knowledge and expertise. (Presumably, even more mid-career members are willing to share, but don't consider

sharing their primary reason for staying in their association.) In mid-career members, your association may have an opportunity to better leverage member expertise to improve your community-driven learning while giving this crucial segment of membership exactly what they want—the opportunity to share their knowledge.



INSIGHT: MEMBERS COME FOR COMMUNITY AND STAY FOR LEARNING.

Our results suggest that the typical association would have more than enough willing sharers for volunteer opportunities and leadership roles, and those sharers are most commonly found among mid-career members. The challenge? Finding them, and managing their contributions. See: technology frustrations.

SIMPLIFYING THE EXPERIENCE

Advances in technology have sent member expectations soaring and members perceive their associations are struggling to keep up. This year, three primary tech frustrations shared space at the top of the list.

PRIMARY TECH FRUSTRATIONS	
THE TECHNOLOGY SEEMS OUTDATED	22%
THE TECHNOLOGY IS HARD TO NAVIGATE, NOT INTUITIVE	22%
TOO MANY TECH PLATFORMS CREATE A SILOED EXPERIENCE	21%

The frustrations members report are largely unchanged from last year, but provide critical insight into where association leaders need to focus effort and investment to create a simpler experience that better meets member needs.

“It should come as no surprise that members are frustrated by dated, hard-to-navigate, siloed technology. The frustrations members report are largely unchanged from last year, but provide critical insight into where you need to focus effort and investment to create a simpler experience that better meets member needs.

Members’ frustrations with outdated and hard-to-navigate platforms points to the fact that many associations are still on their first-generation community and learning platforms. Their frustration with too many platforms suggests that association members see community and learning as one holistic

experience and not necessarily the realm of separate community and LMS platforms.

Delivering value requires reducing frustration and—even more importantly—delivering a dynamic experience. The role of technology in community and learning can’t be ignored.

Removing the barriers to community

Responses to this year’s survey exhibit a trend that some association leaders have likely picked up on as they ponder declining conference and meeting participation. Members ranked “to gather at in-person or virtual events” lower on their list of priorities this year, suggesting they believe they can feel a sense of belonging without engaging in person. Consider whether your association can fulfill that desire without investing in the technology to enable it.

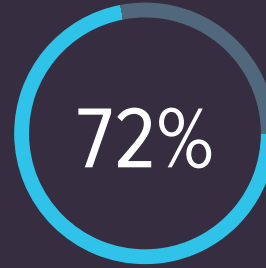
ADDITIONAL REVENUE OPPORTUNITIES

Last year's survey discovered that many members are willing to pay more for an elevated experience. This year, we took a closer look at the perceptions of members who report that they frequently purchase additional content and experiences. When we dug deeper, we discovered that most members who pay for experiences beyond their dues do so rarely. However, a significant minority - 29% in total - pay for content or experiences three or more times a year.

What unlocks the potential of members to convert into frequent paying customers? How about the ease of doing business? We asked members "How easy is it to do business with your association?" Members who gave their association the highest ratings (6 or 7 on a scale of 1 to 7) for being easy to do business with were four times more likely to be frequent (monthly or more) purchasers compared to those who gave their association lower ratings (5 or lower on a scale of 1 to 7).

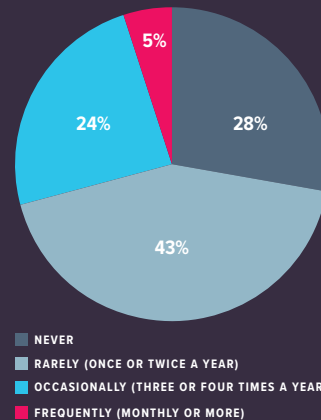
MEMBERS WHO GAVE THEIR ASSOCIATION HIGH RATINGS FOR BEING EASY TO DO BUSINESS WITH WERE **FOUR TIMES MORE LIKELY TO FREQUENTLY PURCHASE CONTENT OR EXPERIENCES.**

4x



PERCENTAGE OF MEMBERS WHO FREQUENTLY, OCCASIONALLY, OR RARELY PAY FOR CONTENT OR EXPERIENCES BEYOND THEIR MEMBERSHIP DUES

HOW OFTEN DO YOU PAY FOR CONTENT OR EXPERIENCES BEYOND YOUR MONTHLY/ANNUAL MEMBERSHIP DUES/FEES?





When you combine this insight with the strong desire respondents expressed to connect and learn, the opportunities for associations to drive additional, non-dues revenue become clear. The key is to make it easy for members to find value-added content and experiences. Failing to build a simple, intuitive member experience may mean you're leaving revenue on the table.

But what does “easy to do business with” mean for association members? The answer may vary by career stage. Perhaps late career members expect email support, while mid-career members want a well-designed website and early career members want an easy-to-use mobile app. Consider building member personas to identify how they prefer to do business with your association.

USING MEMBER PERSONAS TO SHAPE MEMBER EXPERIENCE

In this year's State of MX survey, we spent a lot of time exploring the preferences expressed by members at different stages of their careers. Career stage plays a critical role in shaping member personas, which can be powerful tools to uncover what influences members' wants, needs, and decision-making.

Learn how member personas can equip you to create a member experience that drives revenue, retention, and engagement.

For more research visit forj.ai/resources.



CONCLUSION

As you consider the future of member experience, the findings shared in this report should prompt you to consider how well your association is keeping pace with members' needs and expectations.



MEMBER SATISFACTION IS MIXED

Mixed results in NPS and declining satisfaction serve as a wake-up call to revisit your value proposition and reimagine your MX strategy.



BOTH ACQUISITION AND RETENTION MATTER

Member experience extends across a member's entire journey, which demonstrates that both acquisition and retention deserve equal focus.



COMMUNITY AND LEARNING ARE KEY DRIVERS OF ENGAGEMENT

Members value community and learning most, and optimizing opportunities to connect and learn will help you accelerate growth and stem churn.



THERE ARE STILL OPPORTUNITIES TO SIMPLIFY THE EXPERIENCE

Delivering value requires reducing frustrations and delivering a dynamic experience. The role of robust technology in community and learning can't be ignored.

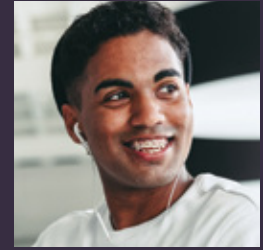
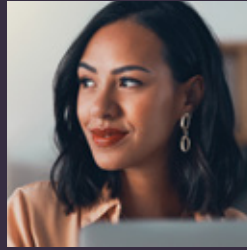
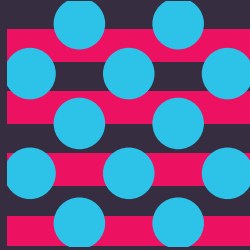


INTUITIVE MEMBER EXPERIENCE IS KEY TO BOOSTING NON-DUES REVENUE

Members spend more with your association when you are easy to do business with. Fail to focus on designing an intuitive member experience, and you may be leaving revenue on the table.

With the right vision, focus, and commitment, association leaders can use these insights to unlock their associations' potential to grow membership, increase retention, and boost non-dues revenue.

For additional insights and guidance, visit us at forj.ai/resources, subscribe to our newsletter, and follow us on LinkedIn.



ABOUT FORJ

Forj is the leading member experience platform provider purpose-built for communities of practice. By combining personalized experiences with advanced learning management, Forj creates an entirely new community experience that connects members for the common good.

Forj will empower over a million professionals in 2023 and is expanding its impact through community-driven learning. The Forj LMS and Community platforms enable organizations to grow their membership, revenue, and impact. Learn more at forj.ai.



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