



Association Laboratory Inc.

CHICAGO, IL

35 East Wacker Drive
Suite 850
Chicago, IL 60601
Telephone: 312-224-2626

WASHINGTON, DC

1120 20th Street NW
Suite 750
Washington, DC 20005
Telephone: 202-216-9675

ONLINE

Twitter: @associationlab
www.associationlaboratory.com

Executive Summary

Looking Forward[®] Challenges 2024

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Letter from the President

We are proud to provide an executive summary of the 13th edition of Looking Forward® Challenges, the leading assessment of association strategies and one of three annual studies in the Looking Forward® series for 2024.

This year, associations continue to struggle with age-old challenges, such as membership. Does this mean we aren't adapting, or are our adaptations failing?

Association volunteer leaders continue to operate within governance systems that are ill-suited to a fast-paced, dynamic world. The result? Too many associations in an environment characterized by savage competition will struggle to be successful.

The challenge for the association sector will be to demonstrate that our sector can adapt and prosper within a business environment characterized by the following.

1. The elimination of boundaries.
2. The disruption of historical behaviors.
3. Savage competition.

Perhaps the 4th area is whether we can convince volunteer leadership that looking backward to history no longer serves their association.

At Association Laboratory, we hope this sector research will guide you in creating a more adaptable and useful association. We will continue our commitment to giving you the information, insights, and opportunities you need to thoughtfully consider your future and develop strategies to make your professional and organizational success a reality.

I hope you will use the information from Looking Forward® Impact contained in this executive summary and in the customizable dataset located on the Looking Forward Dashboard® to inform the decisions that are critical to your association's success.

If I or my team can ever assist, never hesitate to contact us. We look forward to working with you.



Dean West, FASAE
President and Founder
Association Laboratory Inc.



Thanks to Our Strategic Partners

Association Laboratory would like to thank two companies for their essential contributions to the continued collection and dissemination of quality association sector research.

Gravitate

Gravitate 's Nucleus data analytics platform was built specifically for associations and is designed to meet the unique needs of the member industry.

Nucleus aggregates the vast amounts of member data currently stored in different systems across member-based organizations (AMS, email marketing, events, learning management, online community and more) and makes insights into this data available to everyone: staff, leadership, components, the board – and even members.

The Looking Forward® 2024 Data Dashboard is Nucleus, specially configured to show this important environmental scan information and allow you to explore it.

Gravitate is thrilled to have been selected as the official data analytics solution of the Association Laboratory Research Alliance and hopes you enjoy this new way to benefit from the Looking Forward® study.

You are invited to browse the [Analytics for Associations Success Kit](#) to learn more about Nucleus and to contact us to discuss use cases at your organization at analytics@gravitatesolutions.com.

CE21

CE21 is a cloud-based technology and services company that provides a full-service Learning Management System (LMS) that delivers distance education, online registration, and physical product sales solutions.



The company serves professional education verticals including Legal, Accounting, Health Care, Insurance, Business, Education Content Providers, Professional & Trade Associations, and Non-Profit Organizations.

[Association Laboratory uses CE21's LMS system to increase its capacity and capability to provide cutting-edge content to association leaders. You can see the system in action at the \[Association Laboratory's Knowledge Center\]\(#\).](#)

CE21's award-winning LMS can help your organization deliver a best-in-class e-learning experience designed specifically for your most important customers – your learners.

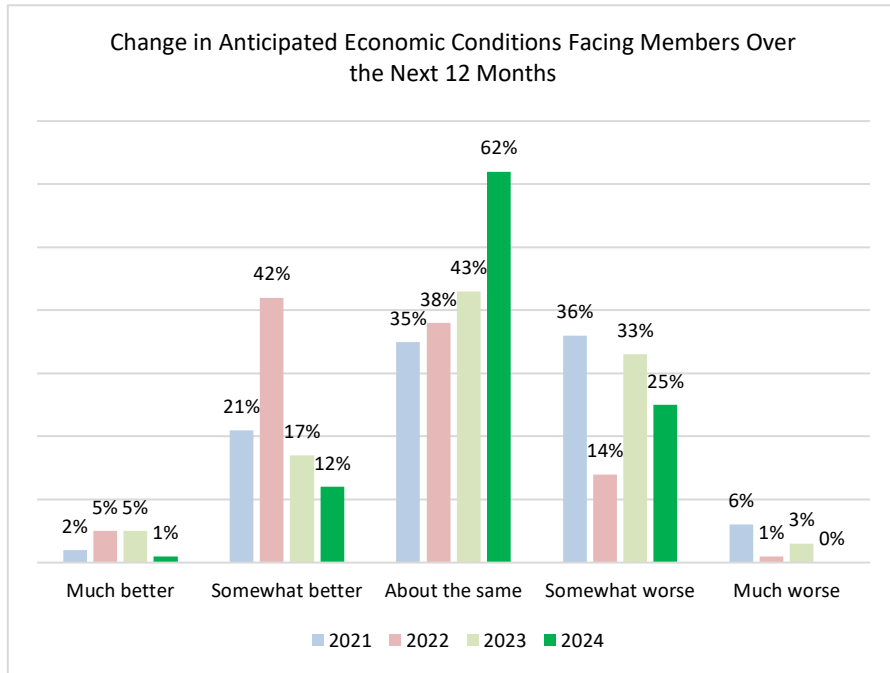
Built for today but designed with the flexibility to take on tomorrow's changing needs, CE21 provides an elegant, mobile-optimized online learning environment that will transform your organization into a 24/7 on-demand value provider.

For more information visit CE21.com.

Economic Circumstances Facing Association Members

In 2014, Association Laboratory’s sector research on behalf of the ASAE Foundation identified the link between the economic circumstances facing members and member organizations and their likelihood of engagement with the association.

Historically, the more economic hardship faced by association members, the less likely they were to engage with an association. In Looking Forward® Challenges, we asked respondents to identify the anticipated economic circumstances of their members during the upcoming year.



In 2024, just 13% of associations anticipate their members facing a more positive economic climate, compared to 25% anticipating a more challenging economic climate.

The lesson? The post-COVID economy continues to be in flux, although there is some indication that expectations are stabilizing.

Associations committed to understanding the changing nature of their audience and its needs should still be well-positioned to prosper.

FIGURE 1 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

Question text: What will be the economic situation facing your members over the next 12 months?

Leaders must continue assessing the future economic climate facing their members and understanding the impacts, challenges, and opportunities this climate presents to the association.

The Challenges Facing Association Strategies

Looking Forward® Challenges assesses challenges across 10 association strategy domains. Participants identified the most significant challenges to their association’s success within these strategies.

Strategic Concerns

Looking Forward® Challenges asked respondents to identify the association strategy domains most likely to face challenges shortly. The following three charts compare the responses in 2024, 2023, and 2022 and identify the level of concern respondents have for each strategy (shown in descending order based on the “Concerned” data).

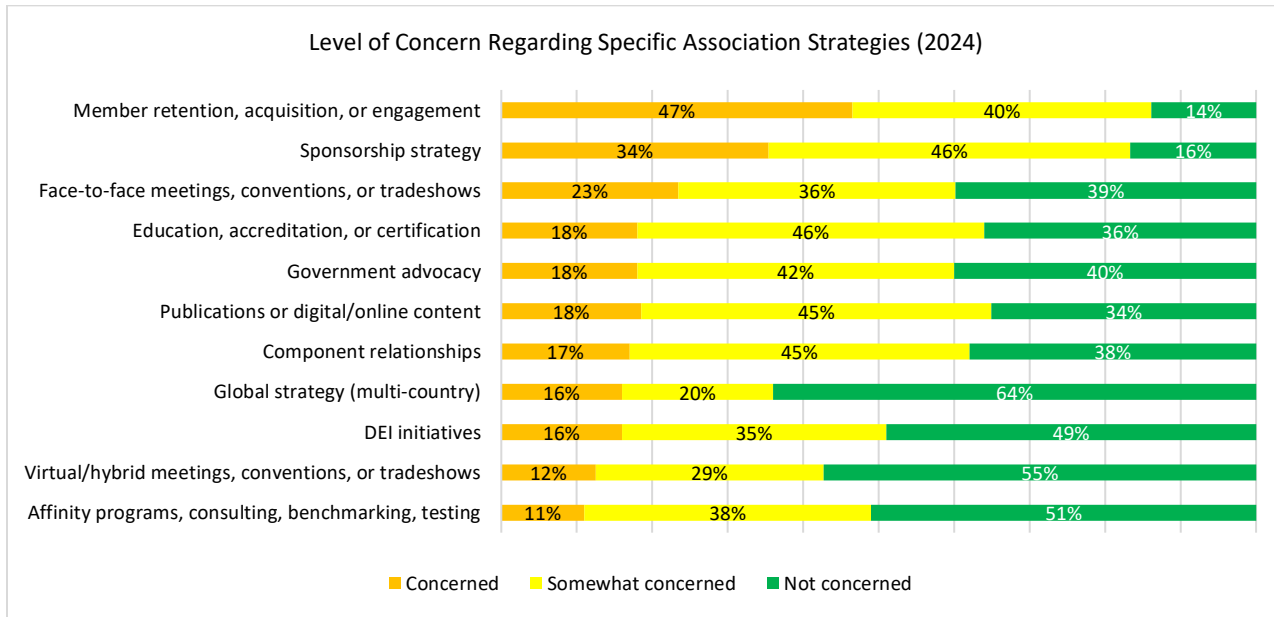


FIGURE 2 LOOKING FORWARD CHALLENGES 2024

Question text: How concerned are you about each of the following association strategies over the next three years?

The main point of interest in the 2024 strategic concerns data is the overall lower level of strategic concerns across the board compared with the 2023 and 2022 data. Member retention, acquisition, and engagement remain the top strategic concerns among respondents.

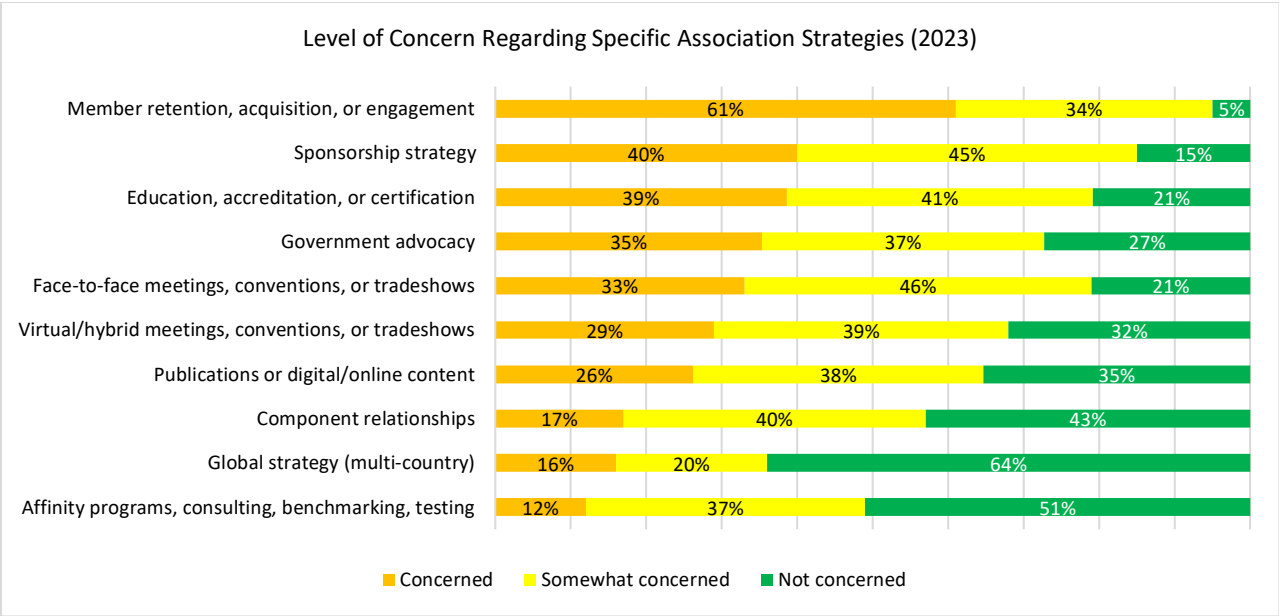


FIGURE 3 LOOKING FORWARD IMPACT 2023

Question text: How concerned are you about each of the following association strategies over the next three years?

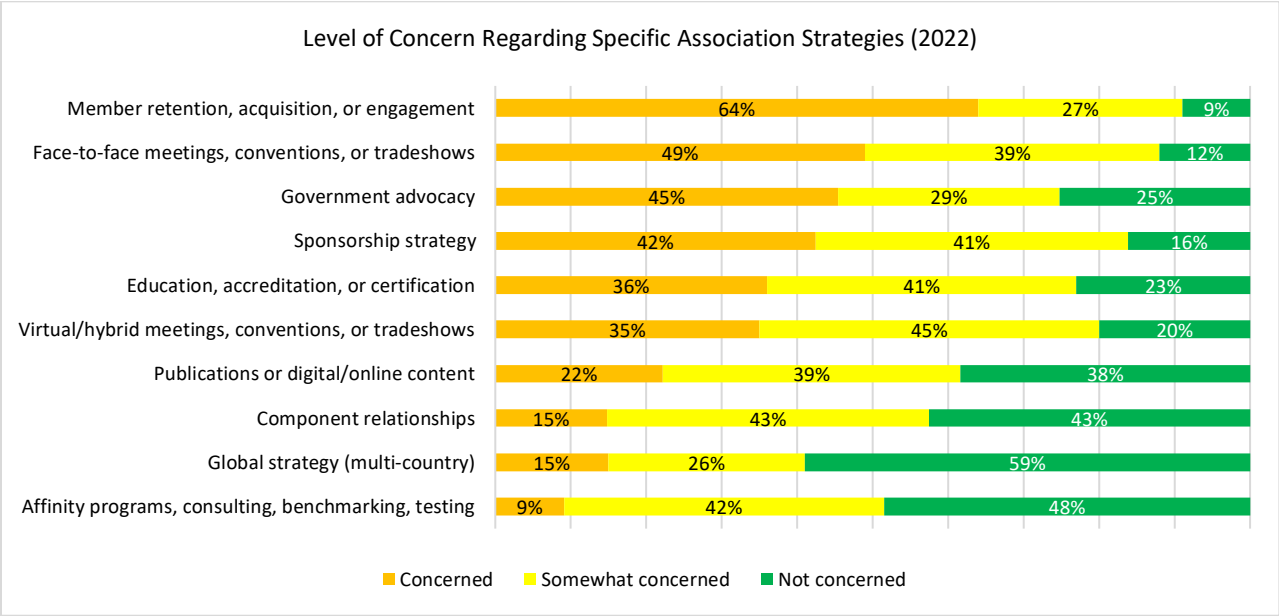


FIGURE 4 LOOKING FORWARD IMPACT 2022

Question text: How concerned are you about each of the following association strategies over the next three years?

Challenges to Face-to-Face Meetings Strategy

The following are the primary anticipated challenges of a face-to-face meeting strategy.

COVID-era concerns such as onsite safety protocols and travel fears have mostly disappeared. The primary concerns in 2024 are event pricing and creating compelling, relevant experiences and content for audiences.

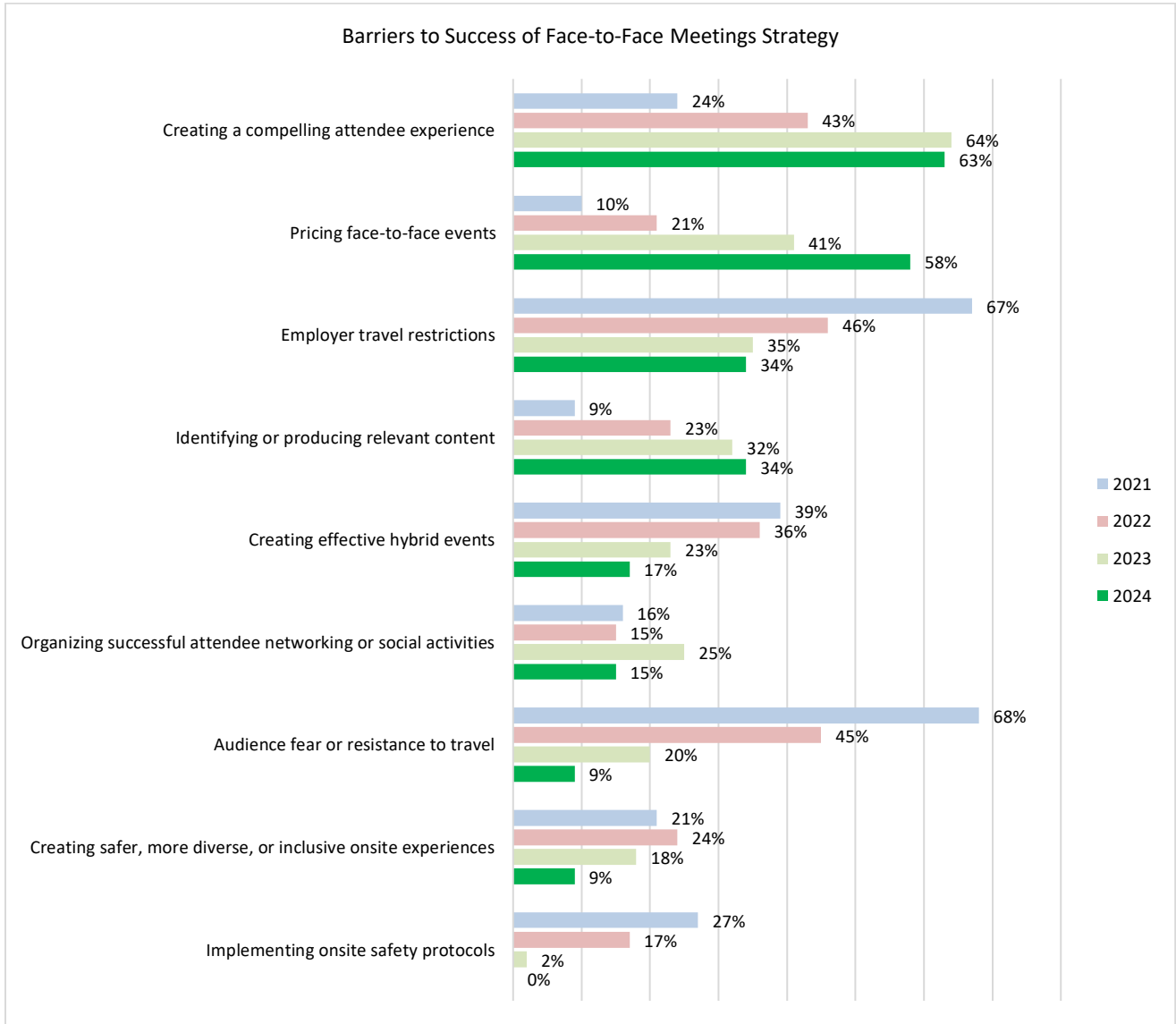


FIGURE 5 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024
 Question text: *What are the most substantial barriers to the success of your face-to-face meetings? Select up to three.*
 (Respondents indicating concern regarding face-to-face meetings only)

Challenges to Membership Strategy

Membership is a foundational strategy essential to the success of most associations. The following are the primary anticipated challenges to this strategy.

The 2024 data suggests a shift in focus away from creating more engaging digital/online member relationships and toward creating more in-depth community engagement.

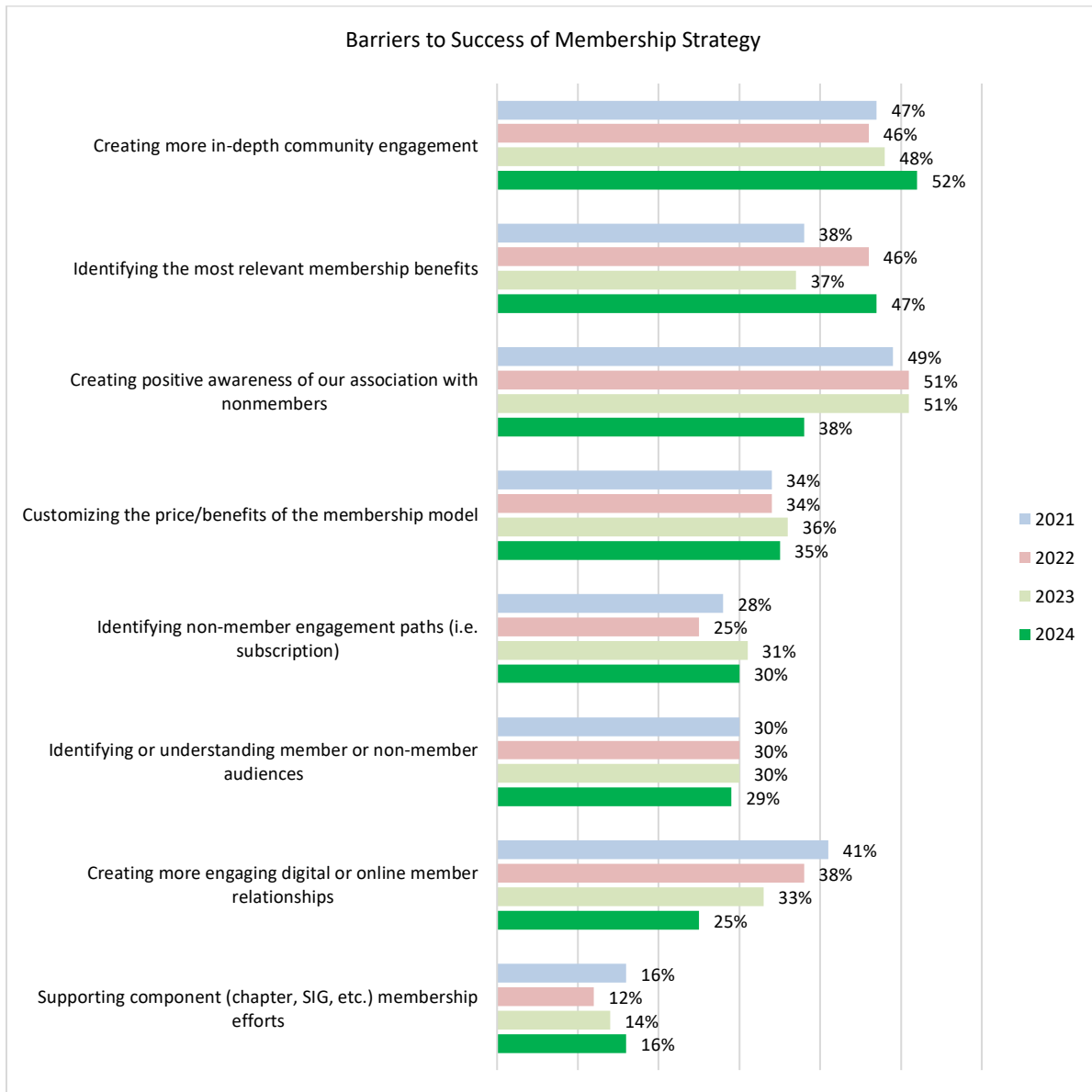


FIGURE 6 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

Question text: What are the most substantial barriers to the success of your membership strategy? Select up to three.
(Respondents indicating concern regarding membership strategy only)

Challenges to Exhibits or Sponsor Strategy

Supplier support of associations is often essential to a sustainable financial model. The following are the primary anticipated challenges to this strategy.

The 2024 data suggests that respondents are increasingly concerned about identifying new exhibitors/sponsors and managing the changing nature of the buyer/seller relationship.



FIGURE 7 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

Question text: What are the most substantial barriers to the success of your exhibitor or sponsor strategies? Select up to three.
 (Respondents indicating concern regarding exhibitor/sponsorship strategy only)

Challenges to Virtual/Hybrid Meetings Strategy

Many associations have adjusted their strategy to offer members and stakeholders virtual or hybrid meeting options. The following are the primary anticipated challenges to this strategy. The data indicates that respondents may be increasingly struggling with audience unwillingness to pay for these virtual offerings.

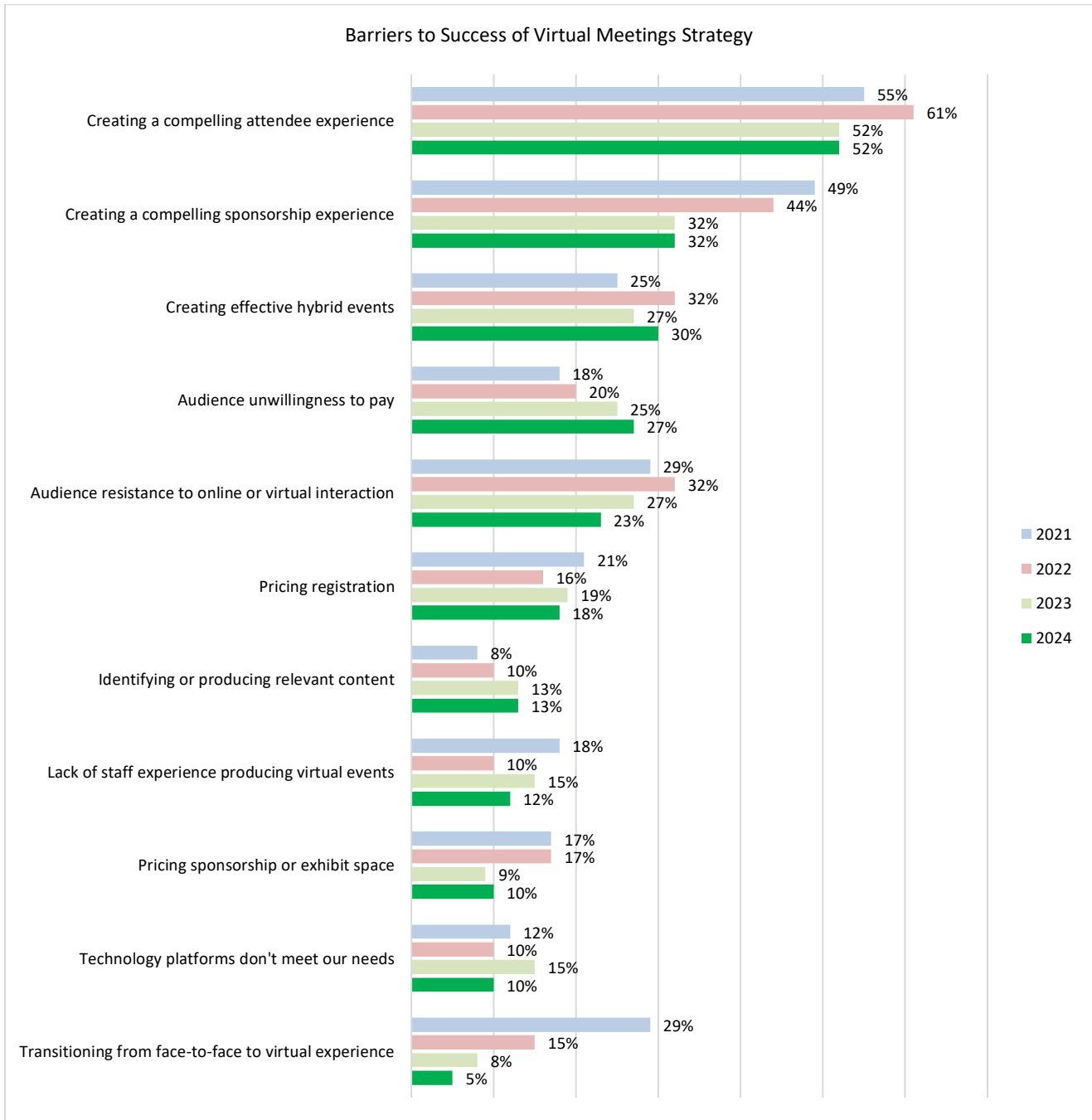


FIGURE 8 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024
 Question text: What are the most substantial barriers to the success of your virtual meetings? Select up to three.
 (Respondents indicating concern regarding virtual meeting strategy only)

Challenges to Government Advocacy Strategy

Many associations act as an aggregating, unifying voice for their industry or profession. The following are the primary anticipated challenges to this strategy. As in past years, creating member awareness of advocacy successes remains the top challenge.

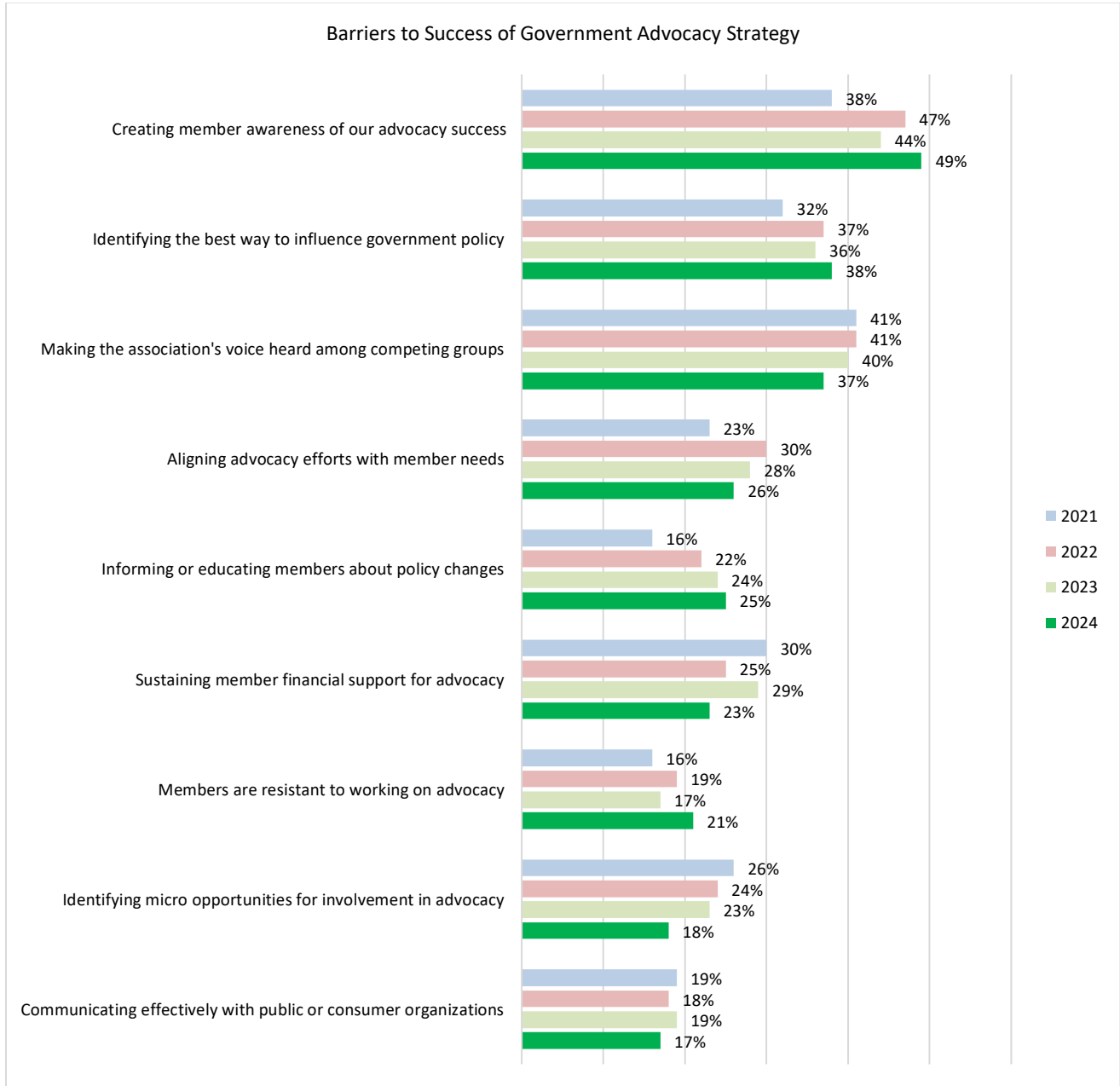


FIGURE 9 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024
 Question text: *What are the most substantial barriers to the success of your government advocacy strategy? Select up to three.*
 (Respondents indicating concern regarding government advocacy strategy only)

Challenges to Education Strategy

Education is central to many associations' missions. The following are the anticipated challenges to this strategy.

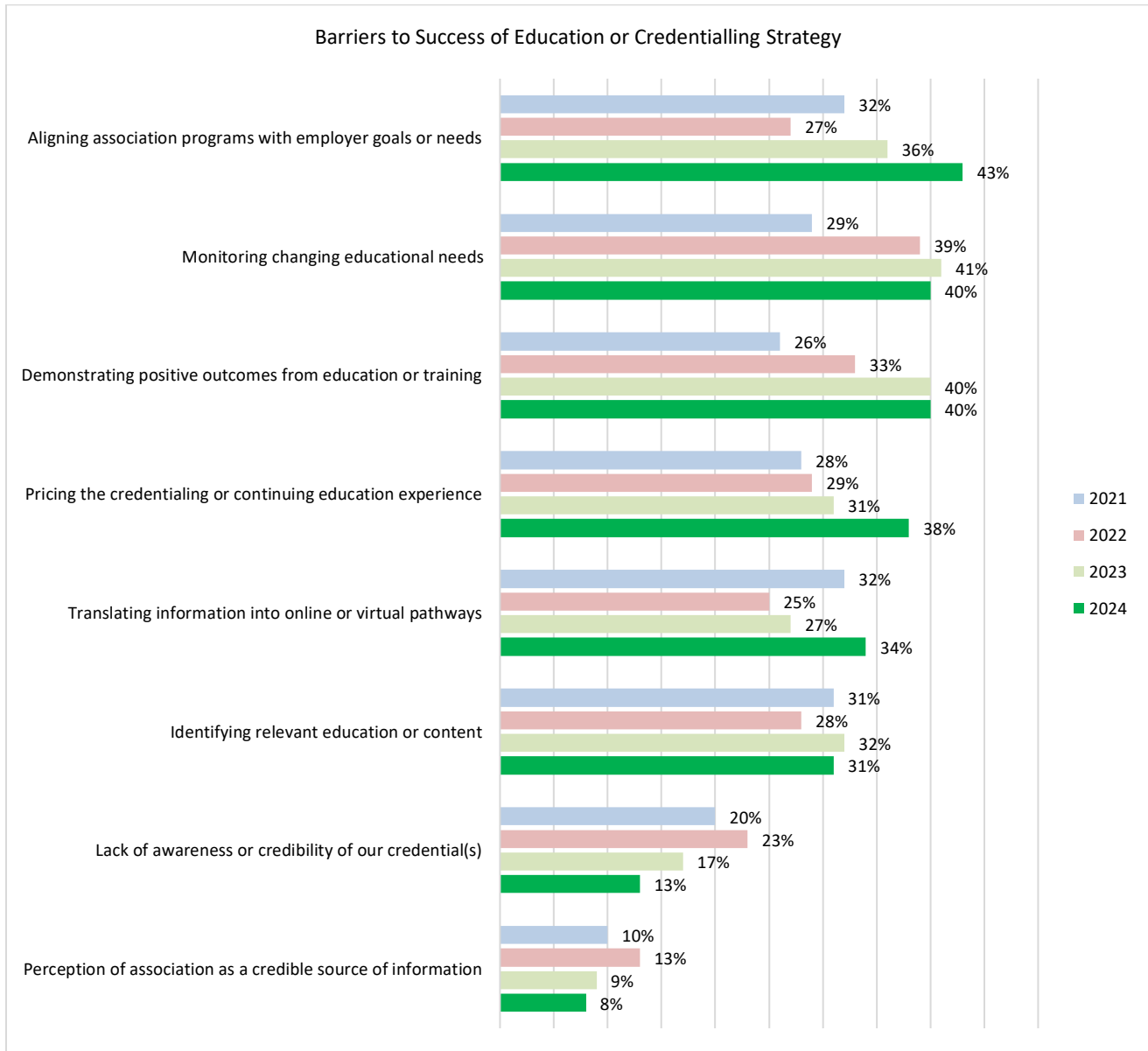


FIGURE 10 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

Question text: *What are the most substantial barriers to the success of your education or credential (certification/accreditation) strategy?*

Select up to three.

(Respondents indicating concern regarding education/credentialing strategy only)

Challenges to Publications or Content Strategy

One of the most substantial strategies for associations is creating, vetting, and disseminating relevant information. The following are the anticipated challenges to this strategy.

The need to compete with free or open-source online content remains a significant challenge for associations, and there is evidence of increasing concern in 2024 about how to create effective business models for content production.

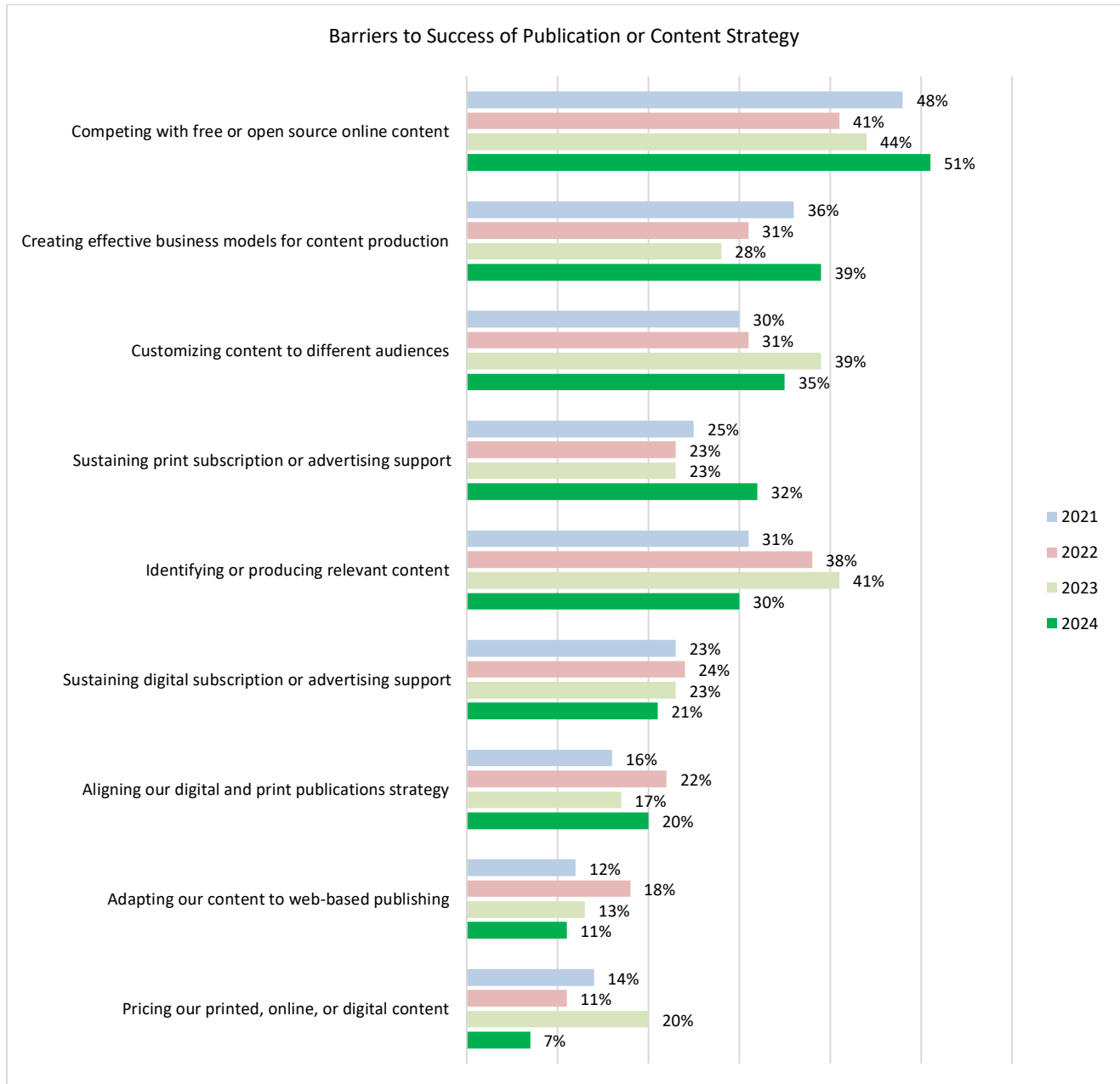


FIGURE 11 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

Question text: What are the most substantial barriers to the success of your published, online, or digital content strategy? Select up to three.

(Respondents indicating concern regarding publications/content strategy only)

Challenges to Component Strategy

The component relationship and component strategy are vital to many associations, ranging from efforts at distinct localities to global markets. The following are the anticipated challenges to this strategy.

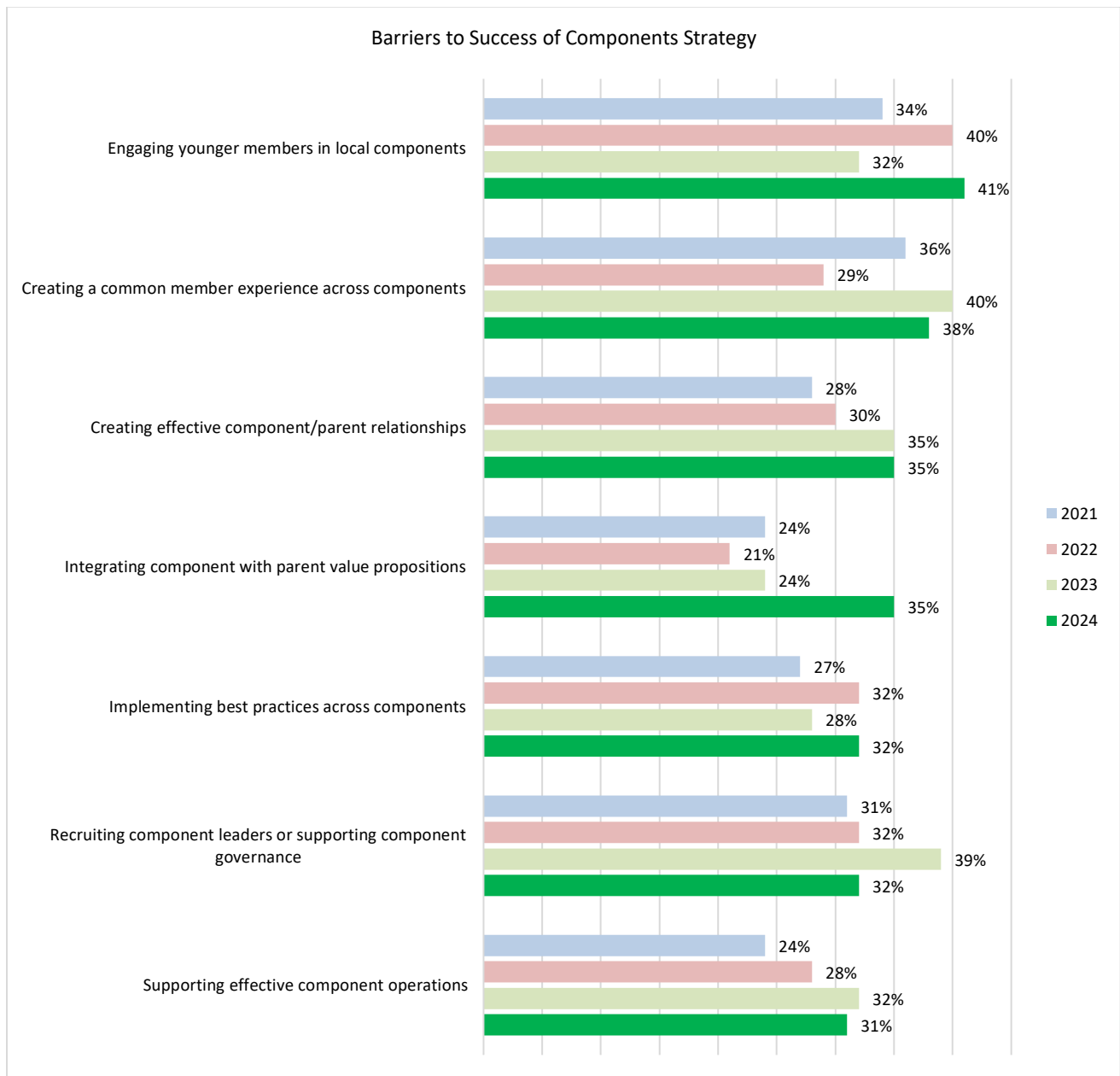


FIGURE 12 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

*Question text: What are the most substantial barriers to the success of your component relationships or strategy? Select up to three.
(Respondents indicating concern regarding component strategy only)*

Challenges to Global Strategy

Many associations have an international or global reach, targeting audiences from multiple countries or regions.

Respondents who self-identified as international (serving across two or more countries) were asked to identify the most significant challenges to global strategy.

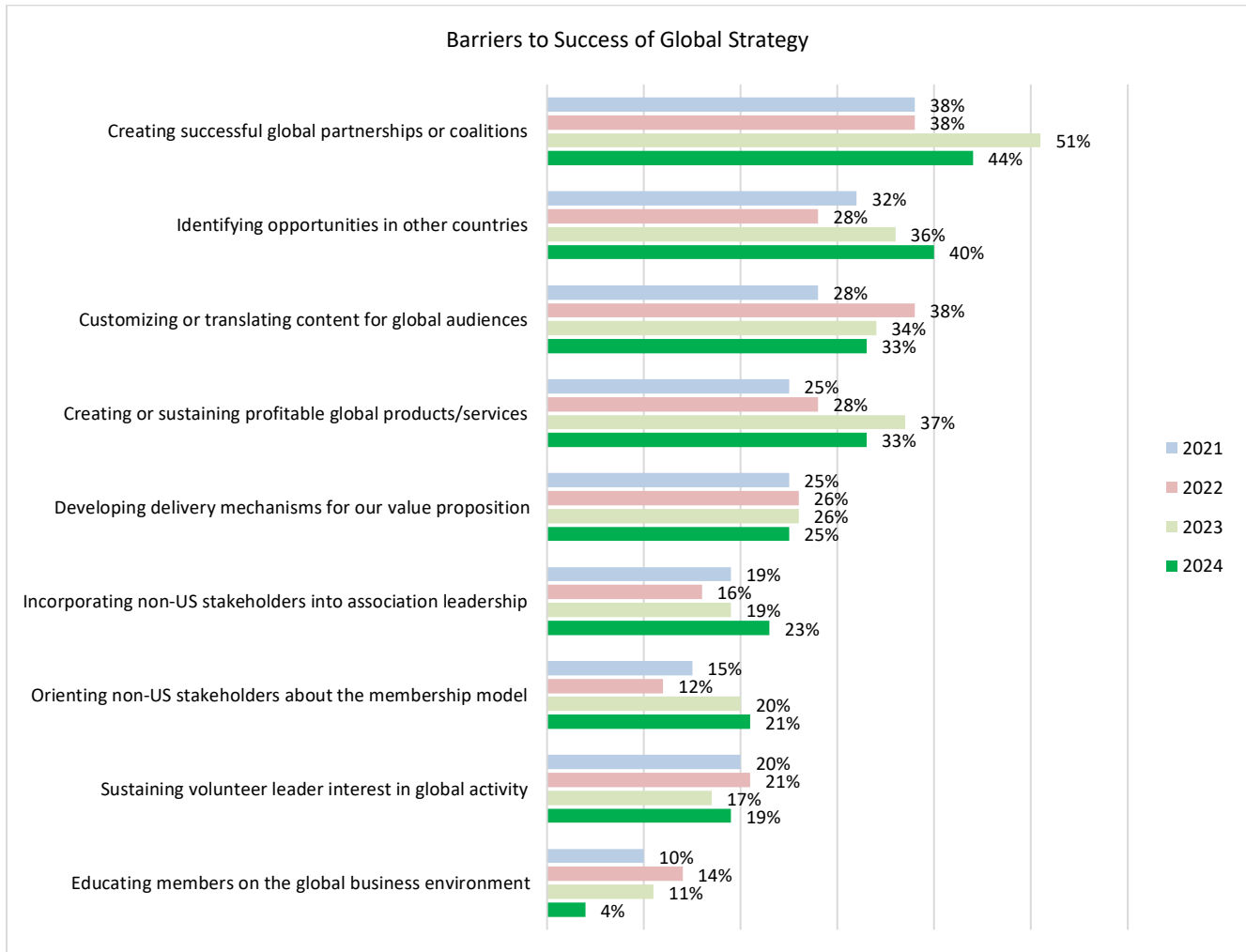


FIGURE 13 LOOKING FORWARD IMPACT /CHALLENGES 2021-2024

Question text: What are the most substantial barriers to the success of your global strategy? Select up to three.

(Respondents indicating concern regarding global strategy, and with a 2+ country scope, only)

Challenges to DEI Strategy

In 2024, associations appear to be more focused on improving inclusivity than working on diversity or equity efforts.

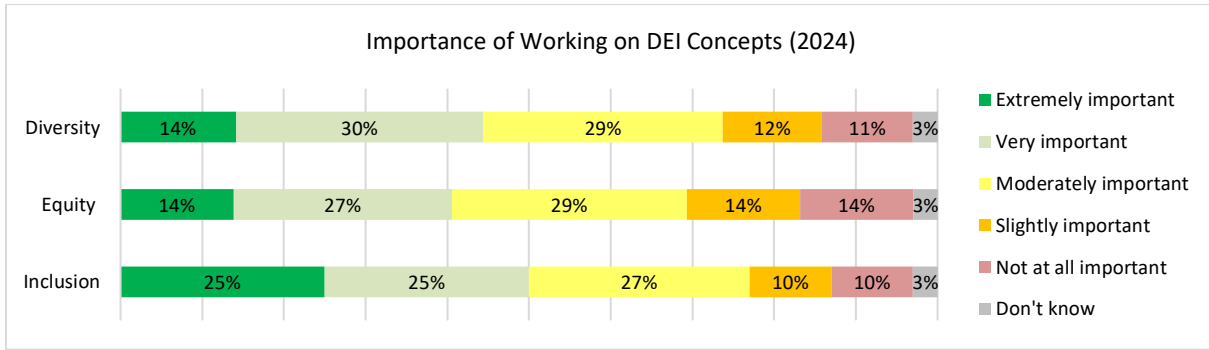


FIGURE 14 LOOKING FORWARD CHALLENGES 2024
Question text: How important will working on each of the following concepts be to your association over the next year?
 (All respondents)

For nearly half of respondent organizations in 2024, the main challenge to DEI strategy is difficulty deciding on clear or meaningful measures of success.

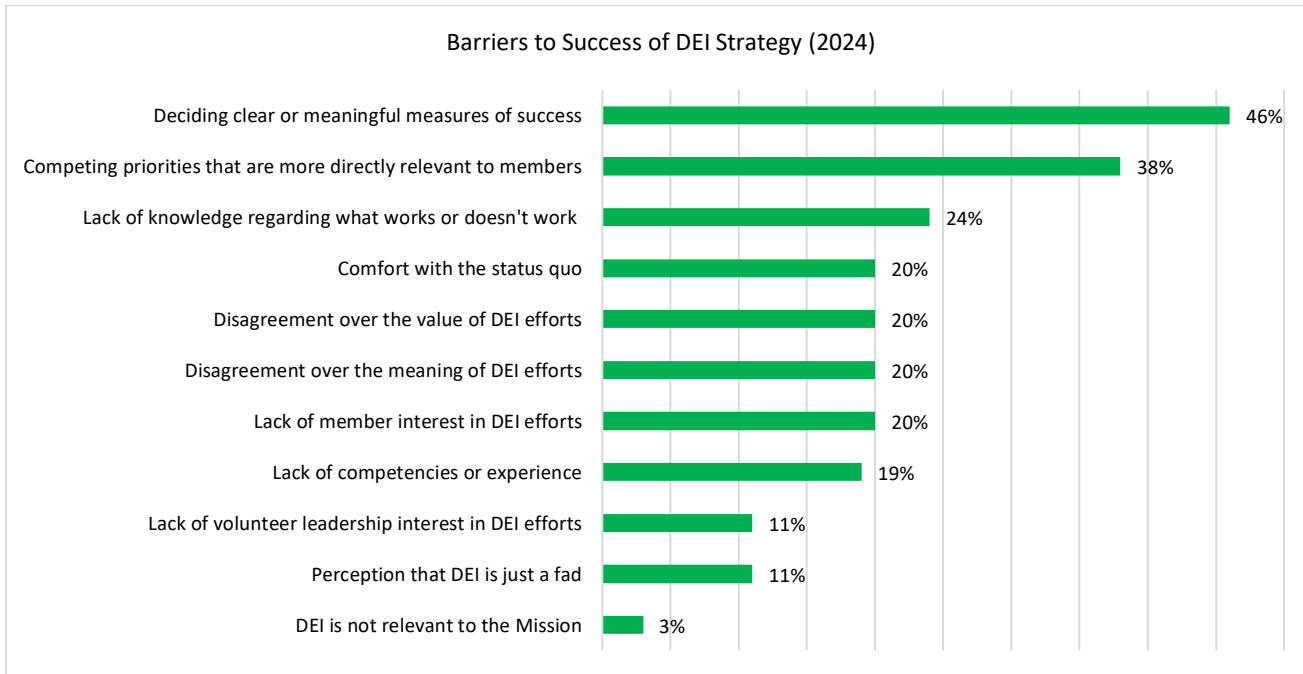


FIGURE 15 LOOKING FORWARD CHALLENGES 2024
Question text: What are the most substantial barriers to the success of your DEI strategies? Select up to three.
 (Respondents indicating concern regarding DEI strategy only)

Challenges to Internal Governance

Faster, better decision-making within associations is an essential condition of success. The following are the anticipated challenges to internal association governance.

In 2024, associations appear to be struggling with creating and sustaining a strategic, future-focused function among the Board and volunteer leaders. However, respondents seem to be struggling less with creating diversity within leadership.

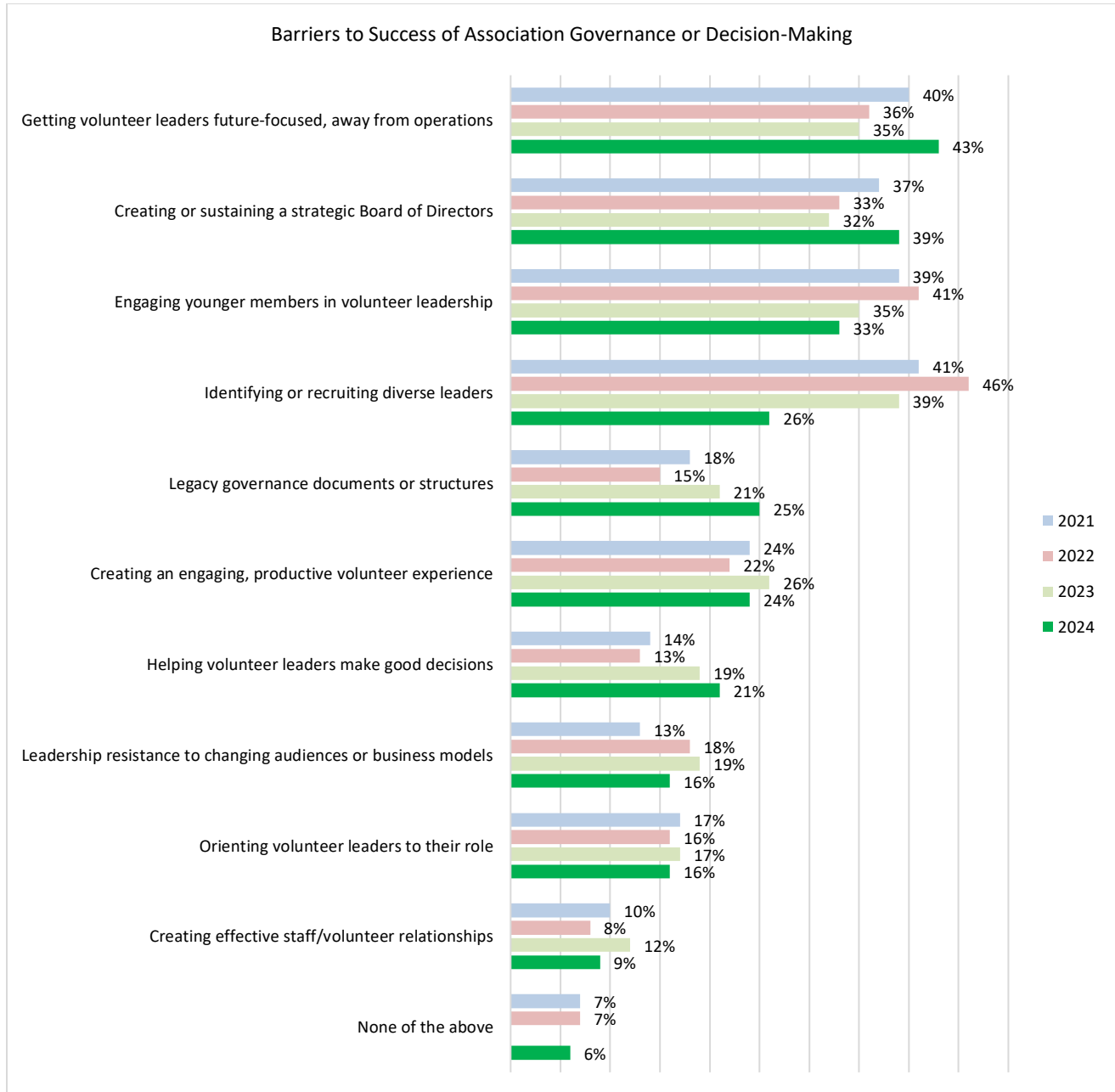


FIGURE 16 LOOKING FORWARD IMPACT/CHALLENGES 2021-2024

Question text: What are the most substantial barriers to the success of your governance or decision-making? Select up to three.
(All respondents)

Closing

Associations continue efforts to adapt to a changing world.

To be successful, it will be vital to answer the following questions.

1. Who are you designing your association to serve?
2. What is the world in which your market lives and works, and what are the implications of their needs?
3. What are they attempting to accomplish within this world relevant to your association?
4. What is their relationship to your association?
5. How is the relationship impacted by alternatives in the market?

The increasing competitive challenge facing associations shows that other entities have discovered the value of creating a relationship with their community. They don't necessarily believe your association is the best avenue to create this relationship.

Too many associations are structured around historical assumptions to be successful in a world that has changed so dramatically that these assumptions are obsolete.

Associations that invest in market knowledge, create business processes to make effective decisions, and strategically differentiate themselves from competitors are more likely to be successful.

As a new generation of volunteer leaders and executives begins taking their place in leadership, we will have unprecedented tools, resources, and opportunities.

During the next 10 years we will discover whether our ability as executives will be sufficient to keep the association sector prospering.

Please contact Association Laboratory if you believe we can help in any way.

Good luck.

Appendix 1: Accessing the Looking Forward® Dashboard.

The most recent, relevant, and customizable data to inform your decisions is critical in a dynamic and uncertain environment.

For 13 years, Association Laboratory has produced our annual environmental scan of the association strategy environment – Looking Forward® Impact. Now more than ever, it is critical for association leaders to make faster, better decisions. You will need to know what the future looks like now, not later.

Looking Forward® data is provided via a customizable dashboard, allowing you to focus on the segment of the association sector most critical to you, your staff and Board. See what issues are impacting members and identify the challenges you'll face. Then download the custom report to guide discussions with your team and volunteer leaders.

[Click here for the Looking Forward Dashboard](#)

How to use the dashboard

The Looking Forward Dashboard is a simplified presentation of research. It does not, for example, provide unique n counts (number of respondents per individual question) for each question. The overall total number of respondents, and the number of filtered respondents if filters are selected, is displayed at the top of the page. The percentages shown are based on these totals.

As you drill down into the data and customize your report to your needs, it is expected that only the most relevant data per question will be included. Due to the different counting methodologies and the natural limitations of a published document requiring data counts at a particular time, there may be minor differences between the Executive Summary Looking Forward® 2024 and the Looking Forward Dashboard.

The data dashboard's homepage displays the top-level results of the Looking Forward® 2024 data. Clicking “Explore” in each chart allows you to explore that topic area further.

Each chart has a book icon in the bottom right corner, which shows the question that was asked of respondents.

In addition, once you click “Explore,” you will see a list of filters along the right side of the page. These filters allow you to adjust the data set by annual budget, member size, organization type, location, profession, and organization type (meaning professional or trade). It also allows you to toggle between data years.

The printer graphic at the bottom of each page allows you to print a PDF of the page to use in conversations with your Board.

Appendix 2: Methodology

Looking Forward® Challenges provides an ongoing picture of the challenges associations face as they seek to adapt their strategies and business model to the forces influencing members' professional and business environment.

Association Laboratory developed and deployed an online survey directly and via collaboration with the company's Research Alliance partners. Data collection took place between April 25 and Jun 4, 2024.

Response options for Looking Forward® Challenges 2024 were originally informed by qualitative research conducted in 2021 involving executives from the Association Laboratory Research Alliance membership, combined with Association Laboratory's extensive experience with environmental scanning on behalf of clients representing a wide range of professions and industries.

The study assesses challenges associations face as they adapt to the changing member environment. Specifically, it investigates challenges in the following 11 association strategy areas:

- Member retention, acquisition, or engagement
- Sponsorship strategy
- Face-to-face meetings, conventions, or tradeshow
- Education, accreditation, or certification
- Government advocacy
- Publications or digital/online content
- Component relationships
- Global strategy (multi-country)
- DEI initiatives
- Virtual/hybrid meetings, conventions, or tradeshow
- Internal governance or decision-making

Respondents were first asked to rate how concerned they are about each of the 11 strategy areas:

"How concerned are you about the following association strategies over the next three years?"

Respondents who indicated concern about a strategy were asked a follow-up question about their specific concerns, such as:

"What are the most substantial barriers to the success of your governance or decision-making? Select up to three."

The survey also collected information, including:

- General economic outlook for members
- Demographic info

A total of 172 individuals participated in the survey.

Appendix 3: About Association Laboratory

Association Laboratory helps association leaders make better decisions through research and strategy consulting services, dissemination of association sector research insights and the education of association leaders.

The award-winning company is a national leader in developing sustainable, successful strategy for associations and has been advising associations since 1999 from offices in Washington, DC and Chicago, IL. You can learn more about us at www.associationlaboratory.com.

Research and Strategy Consulting Services

Association Laboratory is a full-service research and strategy firm. We lead evidence-based, collaborative engagements addressing the spectrum of association challenges. From strategic planning and membership model design to online education and global expansion, the company helps you identify and implement successful business strategy.

Common engagements include the following.

Strategic Planning	Membership Value Proposition and Modeling Strategy
Environmental Scanning	Online Education Strategy
Content Strategy	Component Value Proposition Strategy
Credentialing Strategy	Global Strategy
DEI Strategy	Emerging Leader Strategy

Association Sector Research and Insights

Association Laboratory collects and disseminates association sector research aggregating information collected from hundreds of association leaders; providing you with the most recent, relevant, and useful information you need to guide conversations at your association.

Association Leader Education and Competency Development

Association Laboratory produces strategic educational content designed to help association leaders develop the competencies necessary for success. Research-based and peer driven this content provides you with an engaging, effective means of improving the success of your leadership and decision-making.