COVID-19 Association Pulse Survey Results

How COVID-19 Has Impacted Member Organizations & Lessons Learned
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Goal:

- ORI partnered with **Higher Logic** and **Association Analytics** with the goal of allowing association staff and executives to share their COVID-19 experiences and learn from others.

Survey Method:

- Because our post-COVID-19 world is so unprecedented, standard survey techniques may miss key insights or industry responses by asking narrowly focused, closed-ended questions. As a result, we focused on asking **open-ended questions** to allow respondents to share their voices organically.

  - Online survey with 229 respondents
  - 5 open-ended questions (see appendix for precise questions)
  - 5 closed-ended questions (see appendix for precise questions)

Analysis:

- ORI used Clarabridge’s **AI-driven text analytics** technology to mine unstructured data for **themes, sentiment, and effort**—and then combined this with structured data to allow for segmentation.
What Are Sentiment & Effort?

► What is sentiment?

• Sentiment is a score derived from text using AI-powered technology that captures **how a respondent feels about what they are talking about**.

• Sentiment is scored on an **11-point scale from -5 to +5**, which allows analysis to consider degree of negativity and positivity.

► What is effort?

• Like sentiment, effort is a score derived from text using AI-powered technology. Effort scores capture **whether it was difficult or easy to do or deal with the theme a respondent is talking about**.

• Effort is also scored on an **11-point scale from -5 to +5**.

• Effort is often a **leading indicator of satisfaction**.

► In this report, **negative sentiment** and **high effort** should be understood as indicating **causes of difficulty and frustration in response to COVID-19**. Conversely, positive sentiment and low effort highlight those topics that generated positive responses and a sense of ease related to the COVID-19 pandemic.
Executive Summary of Key Findings
Although numerous platforms for remote work existed before COVID-19, the quarantine and restrictions on gatherings accelerated their adoption among association staff and/or led to increased use.

Many organizations already had a virtual office framework—and those that did not adapted quickly.

• Overall, respondents reported increased use of video conferencing, email, and social media.

• Respondents were also surprised at the speed and relative ease with which their organizations pivoted to remote work.

However, there were differences among associations, with respondents from smaller associations reporting increased engagement via social media and respondents from medium associations reporting increased use of Slack, Microsoft Teams, and chat.

As members both shifted to remote work and found themselves in need of advice and support, online forums offered a way to connect with one another, share insights from their experiences, and engage with the association.
At the same time staff remained quarantined at home, association activities of all kinds continued in the virtual world:

- In-person conferences have been cancelled and re-planned as virtual events.
- Content previously offered in-person has been converted to webinars.
- Committee and board meetings are being hosted in virtual meeting rooms.

Associations also altered the content they provide to members in a variety of ways.

- Many see an opportunity to be a source of reliable COVID-related industry news for their members.
- Others are offering low or no cost educational materials to members.
Mixed Responses Regarding Remote Work

The COVID-19 pandemic required a paradigm shift in the way most association staff work, with quarantines and bans on large gatherings forcing many to transition to remote work.

- For many, working at home has proven surprisingly **effective and productive**. Experiencing the continued productivity of their organizations—from home—has been an eye-opening experience.

- Others have found that working from home presents **challenges in work-life balance** as they struggle to manage children, spouses, pets, and their needs while working or maintaining a delineation between work and non-work time.

- Others mentioned **difficulty in remaining connected** as well as the **benefits of social interaction and in-person collaboration**.
Respondent Demographic Overview
35% of respondents’ organizations had annual budgets of $2 million – $10 million, with the largest segment being those with an annual budget between $2 million and $5 million (19%).

Powered by Clarabridge

n= 229
The largest organizational type respondent group was **individual-based membership organizations** (36%), followed by hybrid (23%) and organization-based (21%), respectively.
Only 9% of respondents had not and were not planning to move any in-person events to virtual. (This does not include those who did not respond or for whom the question did not apply.)

![Pie chart showing the distribution of respondents' responses to moving in-person events to virtual.

- In Process: 32.8%
- Considering It: 27.5%
- Already Complete: 14.0%
- Not Considering: 8.7%
- N/A: 4.8%]
Organizational Responses

What has your association done in response to COVID-19?
Every association survey respondent reported some response to the COVID-19 pandemic. The most common response was to cancel in-person events (82%).

Meanwhile 73% of respondents reported developing new products or services and 72% reported replacing in-person events with virtual events.

Only 7% of respondents reported that their organizations reduced the number of employees and 4% reported reduced membership dues.

### Organization Responses to COVID-19

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Cancelled In-Person Events</td>
<td>82%</td>
</tr>
<tr>
<td>Developed New Products or Services</td>
<td>73%</td>
</tr>
<tr>
<td>Replaced In-Person Events with Virtual Events</td>
<td>72%</td>
</tr>
<tr>
<td>Postponed In-Person Events</td>
<td>53%</td>
</tr>
<tr>
<td>Created Forums for Virtual Events</td>
<td>48%</td>
</tr>
<tr>
<td>Delayed Membership Dues Collection</td>
<td>32%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
</tr>
<tr>
<td>Reduced the Number of Employees</td>
<td>7%</td>
</tr>
<tr>
<td>Reduced Membership Dues</td>
<td>4%</td>
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N=229
In addition to the responses listed, respondents were able to enter “other” ways their organizations had responded to COVID-19 (14% of respondents). Analyzing the verbatim text showed that offering low/no cost education made up 24% of “other” responses.
Associations rose to the challenge to keep their members informed about how COVID-19 is impacting their industries: providing news, updates, and information was the second top-ranked open-ended “other” response (20%).
Surprising Responses to COVID-19

What aspect of how you have responded to the COVID-19 pandemic has surprised you the most?
Approximately 31% of respondents were surprised by topics related to working from home. Of those commenting on working from home, approximately 60% discussed their productivity and morale.
Mixed Reactions to Remote Work

Although working from home was one of the top topics that respondents commented on, they had **mixed sentiment** regarding their new arrangements. Many commented on how **effective and productive** it was, while others found it challenging to find **work-life balance**.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Sentiment</th>
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<td>work from home is going <strong>better</strong> than expected, performance remains high, outcomes are <strong>solid</strong>.</td>
<td></td>
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Positive Surprise at Responding to Changing Needs

The top **positive sentiment driver** was **response time to changing needs** (24%) and how rapidly associations were able to adapt.

- **Response Time to Changing Needs**: 30%
- **Working from Home**: 20%
- **Content and Resource Development**: 15%
- **Efficiency and Productivity**: 10%
- **Changes in Work Structure**: 5%
- **Move to Virtual/Hybrid Meetings**: 5%
- **Teleconferencing**: 5%
- **Emotional Impacts**: 5%
- **Increase Use of Webinars and Digital Education**: 5%
- **Connection/Community**: 2%

**I have been happy** to see how **quickly** our staff and members seem to have adjusted to a complete overhaul in how we do business.

**I have been pleasantly surprised** at how **quickly** we were able to convert some content intended for our in-person event in March to virtual content.

**We have implemented new programs much quicker** than we would have in the past.

**Two positives**: 1) our ability to **quickly** respond to member need for content with a daily microwebinar- 10 minutes of relevant, **timely**, COVID-19 related information and 2) our ability...
The emotional impacts of the pandemic (18% of comments containing negative sentiment), followed by working from home (15% of comments containing negative sentiment), were the top two negative sentiment drivers.

Surprising to keep feeling so uncertain and unsettled about the situation.

As a director as well, I have been concerned with employee morale, especially in light of hour/pay reductions.

I suppose what has 'surprised' me the most, so to speak, is the anxiety I have experienced as a result of being 'on house arrest,' and specifically from the strange combination of working from my apartment all day without being able to

I am surprised at how much I feel like work has invaded my home (safe) space.

I really miss seeing my grandkids and traveling.
Remote Work Elicits High-Effort Commentary

Working from home (27% of comments containing high-effort feedback) and response time to changing needs (18% of comments containing high-effort feedback) were the top drivers of high effort among respondents.

Effort is a score derived from text using Clarabridge’s AI-powered technology. Effort scores capture whether it was difficult or easy to do or deal with the mentioned theme, thereby highlighting where respondents struggled and found success.

Produced by ORI in partnership with Higher Logic and Association Analytics
Online Forum Use & Value

How has the use or value of online forums changed for your organization since the emergence of COVID-19?
62% of respondents indicated that their organizations have an online forum, while 28% reported that their organizations do not use an online forum.
Online Forums: Increased Use & Value for Members

In response to the COVID-19 pandemic, 54% of respondents reported increased use of their online forums—with increases in posts from the organizations as well as increases in posts or responses from members. Respondents reported an uptick in forum use as well as an overall perceived increase in value derived from forums.

We have been using our Higher Logic community to communicate with members on the latest so that has largely impacted use.

I think our members are really appreciating this way of connecting to each other right now.

Perceived increase in the value of membership for those groups that typically had minimal online forum participation prior to COVID-19.

We have also been directing members who are missing networking to the online forum has provided an excellent opportunity for more members with more engagement opportunities.

The level of use of our online members only forum has not really changed.

n= 36

Produced by ORI in partnership with Higher Logic and Association Analytics
Approximately 18% of respondents commented that they have been utilizing their community forums as peer support systems, primarily for members but also among association professionals. This is particularly true of respondents from small associations, who discussed online forums as peer support systems at higher rates than respondents from medium or large associations.

We have also been directing members who are missing networking to the community as a space to network in lieu of in-person events.

Peer to peer - and an opportunity for the association to see what is on the minds of its members.

It is also been a way for members to share online resources, free courses, and peer to peer advice with one another.

Our members have adopted them quickly as a means

They have
Impact on Technology Use

How has COVID-19 impacted your organization’s approach to leveraging technology both internally and to connect with members?
Creative Use of Video Conferencing

Video conferencing use was the top topic of commentary related to technological impacts of COVID-19, with 37% of respondents mentioning it. Specifically, respondents discussed use with members, internal use, and leadership, board, and committee use.
43% of respondents **without online community forums** reported increased reliance on video conferencing, compared to 36% of those **with online community forums**.
Small associations (annual revenue <$5 million) were more likely to report increased social media use and engagement (28% of respondents) than either medium or large associations.
Medium associations (annual revenue $5 million – $10 million) were more likely to report increased use of Microsoft Teams, Slack, and chat (22% of respondents) than either small or large associations.
Innovation in Trying Times

Is there anything else you would like to share with your association colleagues that you think they may find beneficial?
Respondents reported innovating by creating, curating, and/or sharing content and resources. Many respondents’ organizations are providing COVID-related industry news to their members as they look to position themselves as sources of trusted industry information.
Working from home was the second most commented upon topic (22%). Comments varied regarding respondents’ experiences working from home. For some, the transition was quick and/or easier than expected, while for others it has been difficult with spouses, children, and pets to manage. Other respondents considered what the future will look like—whether remote work will continue, how to go back to the office, and potential for saving on real estate costs.
Appendix
1. Which of the following has your association done in response to COVID-19? (Please select all that apply)

• Developed new products or services to help members respond to COVID-19
• Reduced membership dues
• Delayed membership dues collection
• Reduced the number of employees
• Canceled in-person events (conferences, networking events, trade shows, educational opportunities, etc.) for members
• Postponed in-person events for members
• Replaced in-person events with virtual events
• Created forums for virtual events
• Other

▶ If “other,” please elaborate.
2. On an individual level, what aspect of how you have responded to the COVID-19 situation has surprised you the most? (Please elaborate as to whether it has been a positive or negative surprise.)

3. In-person communication and networking have become problematic because of COVID-19. Does your organization have online forums where members can communicate with one another electronically?
   • Yes
   • No

4. How has the use or value of these online forums changed for your organization since the emergence of COVID-19?

5. Are you considering moving one or more of your in-person conferences to be virtual, or have you done so already?
   • We are not considering moving any of our in-person conferences to be virtual.
   • We are considering moving one or more of our in-person conferences to be virtual.
   • We are currently in the process of moving one or more of our in-person conferences to be virtual.
   • We have already held a virtual conference as a replacement for a planned in-person conference.
   • Not applicable to my organization.
6. How has COVID-19 impacted your organization’s approach to leveraging technology both internally and to connect with members? (e.g., increasing social media engagement, more frequent email campaigns, ...)

7. What type of membership organization is your primary employer?
   - Individual-based membership organization
   - Organization-based membership organization
   - Hybrid of (a) and (b)
   - Charity
   - Association management firm
8. What is your primary employer organization’s annual budget?
   - Less than $1 million
   - $1 million to less than $2 million
   - $2 million to less than $5 million
   - $5 million to less than $10 million
   - $10 million to less than $20 million
   - $20 million or more

9. Examples of Innovation in Trying Times: Is there anything else you would like to share with your association colleagues that you think they may find beneficial (e.g., changes to operations, interactions with members)?
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