



# Council of Manufacturing Associations Research Benchmarking Report

Prepared by: *Vault Consulting*

***Vault***



**M.** NATIONAL ASSOCIATION OF  
Manufacturers

# Table of Contents

<b>Methodology</b> .....	<b>3</b>
<b>Key Findings - Interviews</b> .....	<b>6</b>
Current Practices .....	6
Primary Challenges.....	8
Report Output .....	10
Next Steps .....	12
<b>Key Findings - Survey</b> .....	<b>14</b>
Association Demographics.....	14
Staffing, Program Budget and Report Revenue by Annual Sales Volume .....	16
Member Participation, Data Collection and Report Frequency/Format .....	17
<b>Appendix A: Full Data Tables</b> .....	<b>21</b>
<b>Appendix B: Survey Instrument</b> .....	<b>33</b>
<b>Questions and Follow-Up</b> .....	<b>47</b>



## Methodology

NAM's Council of Manufacturing Associations (CMA) conducted a benchmarking survey of research activities in manufacturing trade associations. This report includes the results for all survey questions as well as research related best practices throughout the report from multiple association executives. The results of this survey provide association leaders with key insights on how their research activities compare to their peers in research staffing, funding, revenue and other key metrics.

The survey was launched by Vault Consulting, LLC to CMA members in May 2022. 232 CMA associations received the survey and 43 responded, reflecting a 18% response rate.

This report consists of the following components:

1. **Summary of Interview Findings:** The first section of the report provides a summary of a series of interviews Vault conducted with a select number of survey respondents. The interviews focused on the respondents' research programs, primary challenges and next steps.

Vault and CMA would like to thank the following individuals for providing more details about their research programs:

- Glenn Anderson, *The Plastics Industry Association*
- Jason Blake, *Petroleum Equipment Institute*
- Paul Hirsh, *The Society of Chemical Manufacturers and Affiliates*
- Brad Kalil, *INDA, Association of the Nonwoven Fabrics Industry*
- Roger Miksad, *Battery Council International*
- Tom Morrison, *Metal Treating Institute*
- Jill Notini, *Association of Home Appliance Manufacturers*
- Robert Weidner, *The Metals Service Center Institute*

2. **Overview of Survey Findings:** The second section of the report provides a detailed breakdown of the results from the survey. The survey focuses on two main types of research conducted by associations for their members: industry sales and shipments programs, and operational benchmarking programs.

- Industry sales and shipments programs help members measure their market share by tracking industry sales by units, weight, dollars, price per unit, etc.
- Operational benchmarking programs measure compensation, benefits, financial, and operating trends in the industry so members can see how they compare to similar companies.

In interpreting the survey findings, note:

- When possible, the survey results are grouped by annual association revenue. For this report, the revenue breakouts are:



- All participants did not report on every question; therefore, the number of companies responding to an individual question may not equal the total number of survey respondents.
- Similarly, the percentages shown may not total to 100% for 'select all that apply' questions. This is due to respondents submitting multiple answers per question and basing the percentage calculations off the number of respondents not number of responses.
- The open-ended responses displayed throughout the report and in the appendix have been edited so that no participant-identifying information is disclosed.
- Vault conducted a similar survey of NAM CMA members in 2017 and when applicable those results are compared to the 2022 results in the Key Findings section.

If you have any questions regarding this report, please contact Mike Hayes at *Vault Consulting*, [mhayes@vaultconsulting.com](mailto:mhayes@vaultconsulting.com), or Shonzia Thompson at *CMA*, [sthompson@nam.org](mailto:sthompson@nam.org).

### **About Council of Manufacturing Associations**

The Council of Manufacturing Associations is a division of the National Association of Manufacturers, representing over 220 industry-specific manufacturing trade associations and 130,000 member companies world-wide.

### **About Vault Consulting, LLC**

Vault is the nation's leading accounting, human resources and research firm for non-profits and associations. We equip organizations of all types with the financial acumen to thrive, the HR oversight to drive successful and compliant people practices, and the research-based insights to grow.

### **Research @ Vault**

Vault's distinct Research Group provides a full suite of research services and data analytics to associations, member companies and the for-profit market. Our specialized association focus allows us to add immediate value as we work to solve your unique challenges. Associations turn to Vault to help grow their membership, revenue and engagement, support their advocacy efforts and provide valuable member benefits through industry market reports, benchmarking studies and member needs assessments. Our research solutions provide invaluable business intelligence to help organizational leaders shape strategy, make informed decisions, and ultimately provide amplified stakeholder value.



## Key Findings–Interviews | Current Practices

### Research Program

The associations that participated in the interview process are currently engaged in wide range of research programs. The scale and scope of the research programs varies significantly, ranging from large, automated data collection processes to smaller traditional surveys conducted via email or 3rd party survey platforms.

Program longevity also varied across the interviewees. Some associations have been conducting consistent research for decades, while other programs are relatively new, having begun within the last few years. Associations are conducting research at various cadences. Most typically, a large annual survey is supplemented by shorter “pulse” surveys throughout the year.

Regardless of the size and cadence of the programs, the foundational goal of most programs is to provide members with timely data to help guide their decision-making.

“ One of our value props is that we are an aggregator of data, what are those areas that are most meaningful to our members that we can do for them more cost effectively and efficiently [than they could do themselves]?”

“ Three prongs – validate member business decisions, helps develop narrative for the industry, and then it also is an advocacy piece for going to hill or state legislatures.”

## Sharing Data

The results of research programs are used across member programming, including in webinars and at association events. One interviewee shared they updated their business model to be a content provider, which is largely underpinned by data they collect through their research programs.

The value of the added economic analysis and forecasting was really driven home by one interviewee during Covid. Projections of future market performance and trends proved to be accurate and provided members with a valuable data point to navigate difficult times.

In all cases, member organizations who participate in the research program can access the results of the research without paying an additional fee. Members that do not participate must typically pay an additional fee to view the data. For one, a tiered system is in development where non-members can view limited portions of the data, members are able to view a wider range of the data and subscribers have access to all of the data.

“ Webinars help in terms of keeping our ROI to our members and the industry front and center beyond the surveys. Part of the tools in the toolbox with your ROI, particularly around Industry Intelligence. ”

“ If you participate you get the results free, if you don't participate you have to pay for it, economic incentive for member companies to give us their data. ”



## Primary Challenges

### Staffing and Member Participation

Member participation is an ongoing challenge for most research programs. The participation issue has been exacerbated for many by wider economic trends, namely staffing issues at their member organizations. In many cases, member organizations are finding it difficult to provide data to the associations on a consistent basis. To address this challenge, associations are being very judicious when deciding how many data points they request from their members. Surveys must be much more focused than in prior years, as members often do not have the time or inclination to complete long surveys.

Staffing can also be an issue for the associations themselves, particularly for those that are using legacy processes. Collecting, organizing, analyzing and presenting complex data to member organizations can require significant amounts of resources and some do not currently have the capacity to continue building out their research programs.

“Members are very, very busy. Many members were operating lean and mean before Covid – now they have so much job opening in every part of their operation, everybody is looking for people.”

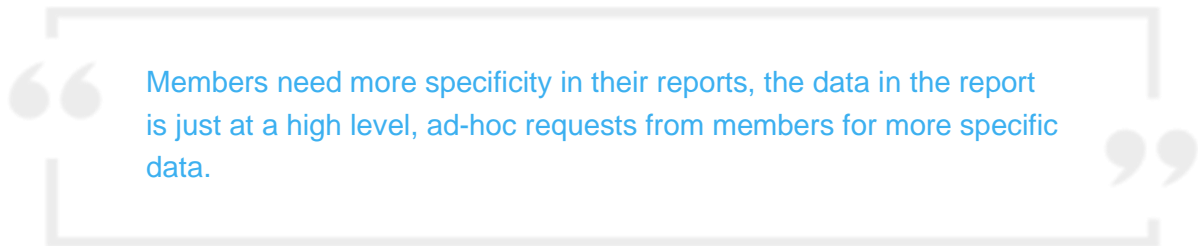
“Third year of the survey, decline in participation. Went from 50% of manufacture members to a little over 40% and now I’m squeaking 30% out this time.”

“Down the road, taking some data and diving deeper, but we just don’t have the time right now.”



## Customization

Members are increasingly looking for custom reports that show industry-level data alongside their own company data. In order to accomplish this, some are developing more automated systems for collecting and reporting out on their data. However, for others, developing more customized reports is not possible due to the staffing constraints mentioned earlier.



Many members have sophisticated business intelligence and data science tools that take the association report output and combine it with additional internal data and economic indicators. While these companies prefer to simply load the association report output directly into their systems, there is still value in associations providing members with custom dashboarding and reporting tools that may lack those resources and sophistication. These tools are often used by internal stakeholders as well.



## Report Output

It is important to provide a variety of report output options to keep engagement high and provide members with multiple ways of viewing the data. One interviewee is currently investing in creating a robust portal that will house all relevant research. Their portal will have tiered access levels where participants will get everything, and non-participants / subscribers will have various access levels and options. This tiered approach will allow the association to create a subscription system that will generate additional non-dues revenue.

A key trend in all interviews is that report output needs to be customized and provide additional ROI. Increasing customization and supplementary products has become a requirement to keep member engagement and participation high.

### **Focus on Value to Members and Participants**

Association produced industry sales and shipments reports are a valuable additional data point that either helps confirm the trends members are seeing in the marketplace or identifies areas where there is misalignment.

According to a highly tenured member company executive, his former company uses the association reports to evaluate the performance of the sales team and make salary and staffing decisions. They benefit greatly from the high level of granularity in the industry sales reports, and the state and regional reports are the most useful dataset. In addition to staffing and salary decisions, the reports are part of the toolbox to make key strategic decisions around inventory levels, new market entry decisions and pricing strategies.

Others stress there are multiple ways to increase the value of research to members. While some groups are investing heavily in custom output and online dashboarding tools, other simple and cost-effective changes like adding executive summaries and more charts and graphs to report output can increase value to participants.

### **Internal stakeholders**

The other audience to consider with report output is association staff. Data from association sponsored research is often used to support advocacy and regulatory efforts so it's important these stakeholders have a robust set of reporting options that can easily be customized. One interviewee leans heavily on his association's research for his "state of the

union” address every year during their large trade show and repurposes the research in his visits with current and prospective members.

### **Supplemental and Timely Analysis**

Many note they are using quick polls and issue driven surveys to complement their larger ongoing research initiatives. These short surveys can provide a sounding board in between the more in-depth association reporting that can drive decision-making. The format of these quick polls ranges from issue driven studies around hot button topics like supply chain challenges or ongoing market sentiment that, over time, can identify key trends. Frequency varies from an ad-hoc basis to ongoing monthly and quarterly surveys.

One interviewee has a unique system in which members can engage with other members directly and offer their own questions. Results are then aggregated and shared with the entire membership. From start to finish this process can take a little as two weeks.

The quick polls and sentiment surveys also provide an opportunity for associations to engage with different groups they may not typically reach. They provide an opportunity to not only get the perspective of senior leadership, but also sales reps, marketing, and mid-level positions along with distributors or other supply chain partners.

### **Added Economic Analysis**

Many also utilize economists to supplement their ongoing research programs. These reports help form a narrative around industry trends and incorporate additional 3<sup>rd</sup> party data sets that are leading drivers and economic indicators for their industry and the overall economy. The reports will often utilize the additional data sets and historical industry performance to provide forecasts.

The added economic analysis and narrative around industry performance typically coincides with a webinar that allows members to ask follow-up questions and probe key topics in more detail.

The value of the added economic analysis and forecasting was really driven home by one interviewee during the onset of Covid. Projections of future market performance and trends proved to be accurate and provided members with a valuable data point to navigate difficult times.



## Next Steps

### Automation

Several of the interviewees are currently transitioning or have transitioned to automated data collection systems which offer many benefits, ranging from greatly improved efficiency to significant reductions in data quality issues.

One interviewee hired a consulting firm to conduct a full gap analysis and brought those results to stakeholders at their member organizations, ranging from the C-Suite to data reporters and legal counsel. The planning and buy-in process has taken the association approximately three years. For another interviewee, automation has enable them to expand their association revenue by 2600% since 2006 while maintaining the same number of staff.

“ Reduces the burden on member companies in their report. Automation will result in operational efficiencies and help to improve the accuracy and timeliness of report. ”

“ We’ve been able to expand capacity without expanding labor. The more you can grow through automation and technology, the more you can expand services ”

“ I think that means for all of our surveys, we have to do a judicious job of asking what do we really want to ask, let’s make sure that the questions are going to bring meaningful, insightful raw data that we can manipulate and provide back to them. ”

**Determining research topics, survey length and cadence**

Many are continuously thinking about the frequency with which they should be asking members for data and how much data they should be requesting. As such, a major next step for many associations is continuing to build out their research programs while remaining cognizant of the amount of work they are requesting from their members.



## Key Findings–Survey | Association Demographics

<b>Type of Research</b>	
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Which of the following types of research does your association conduct? (Select all that apply)	Responses
Industry sales and shipments programs	28 65.1%
Economic outlook and analysis	25 58.1%
Operational benchmarking programs	19 44.2%
Advocacy related research	16 37.2%
Event research	18 41.9%
Strategic research	25 58.1%
Other	6 14.0%
None	1 2.3%
<b>Total</b>	<b>138</b> <b>100.0%</b>

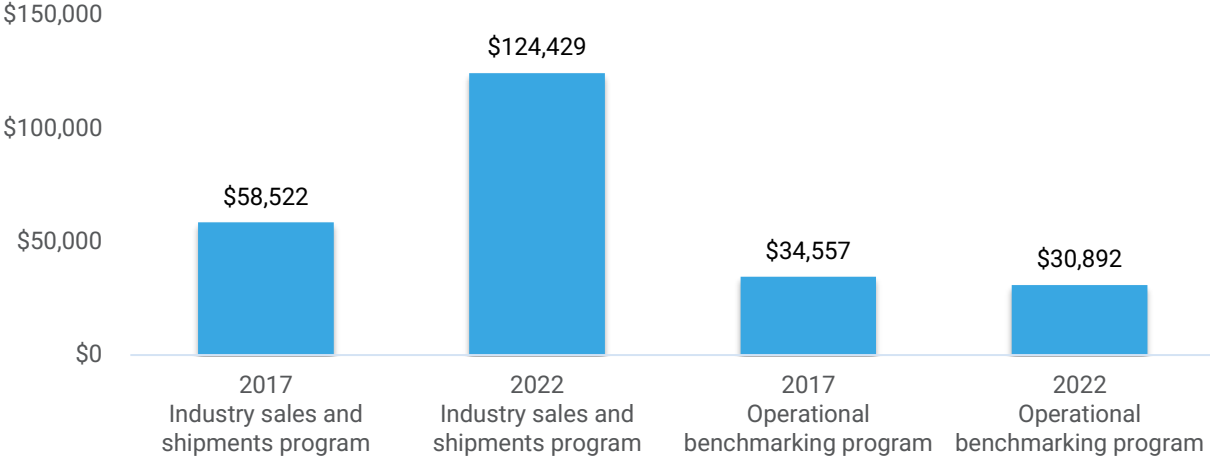
<b>Annual Association Revenue</b>	
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	<b>Sales Volume</b>
25th Percentile	\$2,292,240
Average	\$8,479,092
Median	\$3,644,940
75th Percentile	\$8,340,880

**Annual Program Budget**

What is the annual program management budget for your program?	Industry sales and shipments program	Operational benchmarking program
25th Percentile	\$5,000	\$8,250
Average	\$124,429	\$30,892
Median	\$60,000	\$25,000
75th Percentile	\$175,000	\$38,750
Responses	21	14

Average Annual Program Management Budget



## Staffing, Program Budget & Report Revenue by Annual Association Revenue

### Annual Program Management Budget by Annual Association Revenue

Average Program Management Budget Sorted by Annual Association Revenue	Industry sales and shipments program budget	Operational benchmarking program budget
Annual association revenue less than or equal to \$5M	\$39,100	\$16,000
Annual association revenue between \$5M and \$10	\$185,000	\$24,000
Annual association revenue greater than or equal to \$10M	\$259,400	\$76,666
All associations	\$130,650	\$32,500
Responses	20	12

### Research Staff by Annual Association Revenue

Average Research Staff Sorted by Annual Association Revenue	Average Number of Research Staff
Annual association revenue less than or equal to \$5M	1.8
Annual association revenue between \$5M and \$10	1.7
Annual association revenue greater than or equal to \$10M	2.5
All associations	1.9
Responses	34

### Annual Sales Revenue from Reports by Annual Association Revenue\*

Average Sales Revenue from Reports Sorted by Annual Association Revenue	Revenue: Industry sales and shipments program	Revenue: Operational benchmarking program
Annual association revenue less than or equal to \$5M	\$50,167	\$7,750
Annual association revenue between \$5M and \$10M	\$65,375	\$9,500
Annual association revenue greater than or equal to \$10M	\$22,790	\$2,000
All associations	\$43,892	\$7,249
Responses	12	7

\*Note: Only includes respondents who indicated that they make their reports available for purchase.

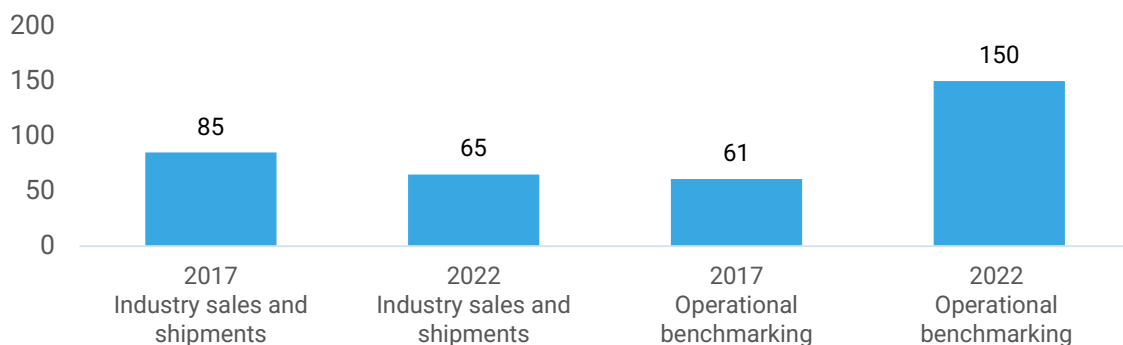


# Member Participation, Data Collection & Report Frequency/Format

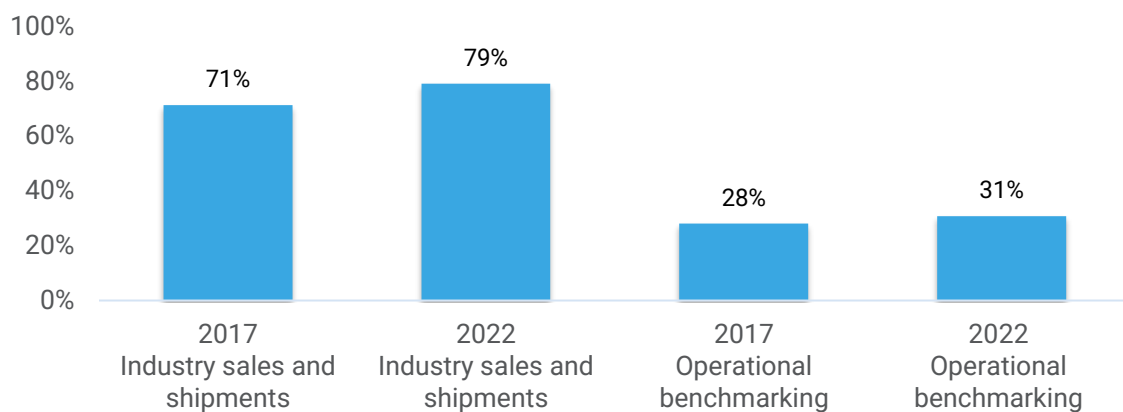
Approximate number of participants in your association’s research programs and percentage of industry represented in published reports

Benchmarks	Industry sales and shipments program		Operational benchmarking program	
	Number of Participants	Estimated % of Industry Represented	Number of Participants	Estimated % of Industry Represented
25th Percentile	25	70.0%	20	4.5%
Average	65	79.2%	150	30.8%
Median	38	87.0%	45	15.0%
75th Percentile	75	90.0%	121	46.5%
Responses	26	25	16	11

Average Number of Participants - 2017 vs. 2022



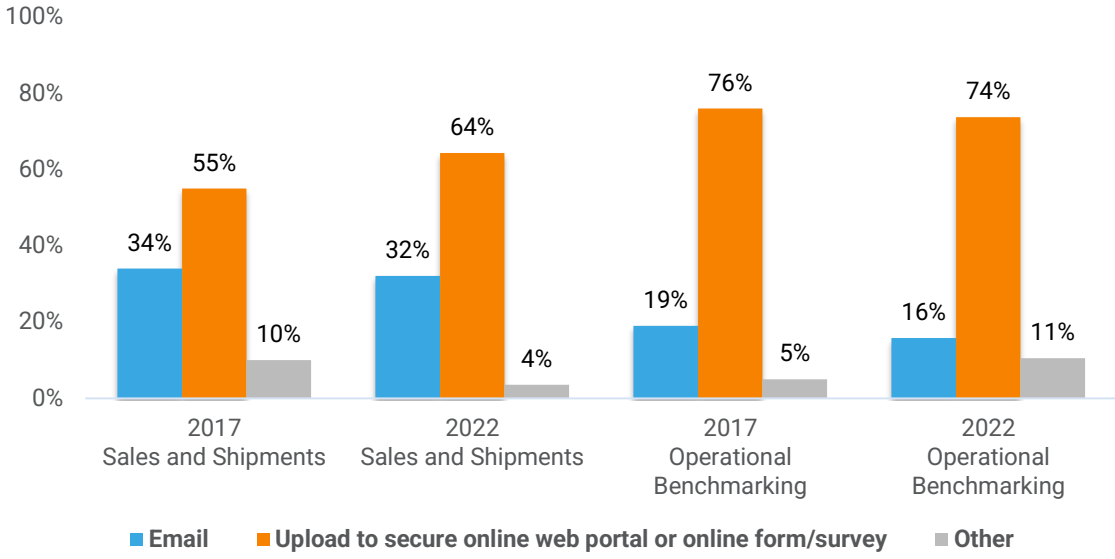
Average Percentage of Industry Represented in Reports



**Primary Data Collection Method**

What is the primary way participants submit data or information for your association's programs?	Industry sales and shipments program	Operational benchmarking program
Email	9 32.1%	3 15.8%
Upload to secure online web portal	<u>14</u> <u>50.0%</u>	<u>7</u> <u>36.8%</u>
Online form / survey	4 14.3%	<u>7</u> <u>36.8%</u>
Other	1 3.6%	2 10.5%
<b>Total</b>	<b>100.0%</b> <b>28</b>	<b>100.0%</b> <b>19</b>

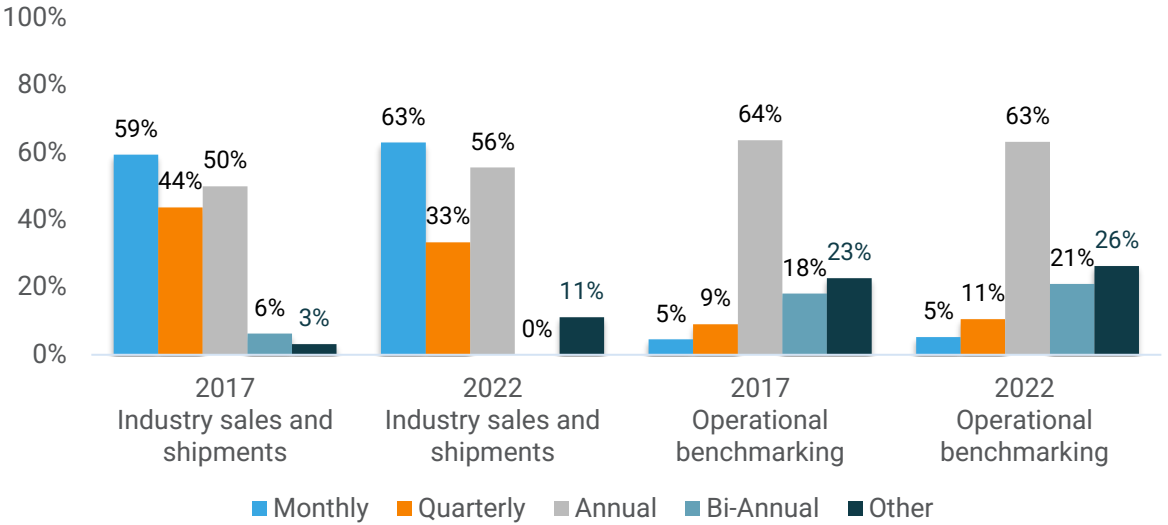
Primary Data Collection Method - 2017 vs. 2022



**Report Frequency**

How often does your association conduct programs? (Select all that apply)	Industry sales and shipments program	Operational benchmarking program
Monthly	<u>17</u> <b>63.0%</b>	1 5.3%
Quarterly	9 33.3%	2 10.5%
Annual	15 55.6%	<u>12</u> <b>63.2%</b>
Bi-Annual	0 0.0%	4 21.1%
Other	3 11.1%	5 26.3%
<b>Total</b>	<b>44</b> <b>100.0%</b>	<b>24</b> <b>100.0%</b>

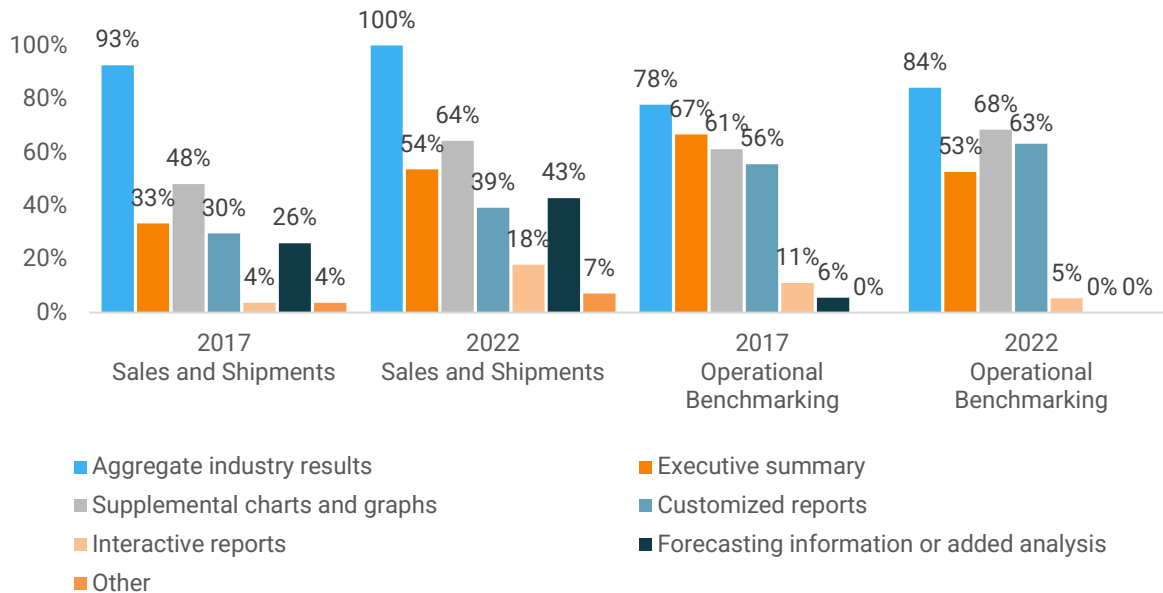
Report Frequency - 2017 vs. 2022



## Report Format

What is the format of your association's reports? (Select all that apply)	Industry sales and shipments program	Operational benchmarking program
Aggregate industry results	<u>28</u>	<u>16</u>
	<u>100.0%</u>	<u>84.2%</u>
Executive summary	15	10
	53.6%	52.6%
Supplemental charts and graphs	18	13
	64.3%	68.4%
Customized reports	11	12
	39.3%	63.2%
Interactive reports	5	1
	17.9%	5.3%
Forecasting information or added analysis	12	0
	42.9%	0.0%
Other	2	0
	7.1%	0.0%
<b>Total</b>	<b>91</b>	<b>52</b>
	<b>100.0%</b>	<b>100.0%</b>

Report Format - 2017 vs. 2022



## Appendix A – Full Data Tables

Type of Research	
Which of the following types of research does your association conduct? (Select all that apply)	Responses
Industry sales and shipments programs	28
	65.1%
Economic outlook and analysis	25
	58.1%
Operational benchmarking programs	19
	44.2%
Advocacy related research	16
	37.2%
Event research	18
	41.9%
Strategic research	25
	58.1%
Other	6
	14.0%
None	1
	2.3%
<b>Total</b>	<b>138</b>
	<b>100.0%</b>

<b>Other:</b>
Consumer attitudes & usage
Product and systems performance research
Consumer Behavior
Economic Impact Analysis
Technical and product performance research and testing
Academic research on best industry models, methods, and practices

**Annual Association Revenue**

25th Percentile	\$2,292,240
Average	\$8,479,092
Median	\$3,644,940
75th Percentile	\$8,340,880

**Annual Program Budget**

<b>What is the annual program management budget for your program?</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
25th Percentile	\$5,000	\$8,250
Average	\$124,429	\$30,892
Median	\$60,000	\$25,000
75th Percentile	\$175,000	\$38,750
Responses	21	14

**Research Staff by Annual Association Revenue**

<b>Average Research Staff Sorted by Annual Association Revenue</b>	<b>Average Number of Research Staff</b>
Annual association revenue less than or equal to \$5M	1.8
Annual association revenue between \$5M and \$10	1.7
Annual association revenue greater than or equal to \$10M	2.5
All associations	1.9
Responses	34

**Annual Program Management Budget by Annual Association Revenue**

<b>Average Program Management Budget Sorted by Annual Association Revenue</b>	<b>Industry sales and shipments program budget</b>	<b>Operational benchmarking program budget</b>
Annual association revenue less than or equal to \$5M	\$39,100	\$16,000
Annual association revenue between \$5M and \$10	\$185,000	\$24,000
Annual association revenue greater than or equal to \$10M	\$259,400	\$76,666
All associations	\$130,650	\$32,500
Responses	20	12

**Approximate number of participants in your association's research programs and percentage of industry represented in published reports**

<b>Benchmarks</b>	<b>Industry sales and shipments program</b>		<b>Operational benchmarking program</b>	
	<b>Number of Participants</b>	<b>Estimated % of Industry Represented</b>	<b>Number of Participants</b>	<b>Estimated % of Industry Represented</b>
25th Percentile	25	70.0%	20	4.5%
Average	65	79.2%	150	30.8%
Median	38	87.0%	45	15.0%
75th Percentile	75	90.0%	121	46.5%
Responses	26	25	16	11

<b>Legal Counsel</b>
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<b>Does your association have a legal counsel approved antitrust policy for research programs?</b>	<b>Responses</b>
Yes	26
	76.5%
No	8
	23.5%
<b>Total</b>	<b>34</b>
	<b>100.0%</b>

<b>Research Committee</b>
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<b>Does your association have a research committee that meets periodically to discuss research activities?</b>	<b>Responses</b>
Yes	18
	52.9%
No	16
	47.1%
<b>Total</b>	<b>34</b>
	<b>100.0%</b>

<b>Number of Times Committee Meets</b>
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<b>Number of times per year on average that the committee meets:</b>	<b>Responses</b>
2	9
	50.0%
3	5
	27.8%
4	1
	5.6%
5	2
	11.1%
6	1
	5.6%
<b>Total</b>	<b>18</b>
	<b>100.0%</b>



**Program Management - Internal Staff**

<b>Which, if any, of the following research programs are you managing with only internal staff?</b>	<b>Responses</b>
Industry sales and shipments programs	14
	46.7%
Economic outlook and analysis	6
	20.0%
Operational benchmarking programs	8
	26.7%
Advocacy related research	8
	26.7%
Event research	12
	40.0%
Strategic research (internal purposes)	13
	43.3%
Other	3
	10.0%
Total	64
	100.0%

<b>Other:</b>
combo of staff & vendors

**Report Frequency**

<b>How often does your association conduct programs? (Select all that apply)</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Monthly	17	1
	63.0%	5.3%
Quarterly	9	2
	33.3%	10.5%
Annual	15	12
	55.6%	63.2%
Bi-Annual	0	4
	0.0%	21.1%
Other	3	5
	11.1%	26.3%
<b>Total</b>	<b>44</b>	<b>24</b>
	<b>100.0%</b>	<b>100.0%</b>

<b>Industry sales and shipments program – Other:</b>
Forecasts 3x per year
every 3 years
Weekly

<b>Operational benchmarking program – Other:</b>
Every 2-3 years
As needed
Biennial
quickie surveys as requested

**Primary Data Collection Method**

<b>What is the primary way participants submit data or information for your association's programs?</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Email	9	3
	32.1%	15.8%
Upload to secure online web portal	14	7
	50.0%	36.8%
Online form / survey	4	7
	14.3%	36.8%
Other	1	2
	3.6%	10.5%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>
	<b>28</b>	<b>19</b>

<b>Industry sales and shipments program – Other:</b>
Phone interviews
<b>Operational benchmarking program – Other:</b>
The benchmarking analyses are performed by an outside consultant.
These are salary studies, or issue specific studies.

**Participation**

<b>Who is able to participate in your association's programs?</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Open only to members	14	12
	50.0%	63.2%
Open to everyone (members and non-members)	12	5
	42.9%	26.3%
Other	2	2
	7.1%	10.5%
<b>Total</b>	<b>28</b>	<b>19</b>
	<b>100.0%</b>	<b>100.0%</b>

**Industry sales and shipments programs – Other:**

The program is open to full manufacturing members and affiliate members (companies that sell/import tires into the U.S. but do not manufacture in the U.S.; affiliate companies must meet a % market threshold to participate).

members, non-members, members' customers

**Costs to Participate**

Are there any costs to participate in your association's programs?	Industry sales and shipments program	Operational benchmarking program
Yes	4	4
	14.3%	21.1%
No	24	15
	85.7%	78.9%
<b>Total</b>	<b>28</b>	<b>19</b>
	<b>100.0%</b>	<b>100.0%</b>

**Pays to Participate**

Who pays to participate in your association's programs? (Select all that apply)	Industry sales and shipments program	Operational benchmarking program
Members	0	3
	0.0%	75.0%
Non-Members	1	1
	25.0%	25.0%
Other	3	1
	75.0%	25.0%
<b>Total</b>	<b>4</b>	<b>5</b>
	<b>100.0%</b>	<b>100.0%</b>

**Industry sales and shipments program – Other:**

Dealers contribute data and receive reports for free

Manufacturers who contribute through dealers purchase

Affiliate members pay a specific annual dues amount related only to the market data program. Full association manufacturer members' participation in the program is included in their association dues.

We do not charge companies to participate. We charge them a fee to access the report.

**Operational benchmarking program – Other:**

The benchmarking studies are baked into the annual operational budget in the years when they are conducted.

**Able to View Reports**

<b>Who is able to view your associations reports free of charge? (Select all that apply)</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Participants	16	10
	57.1%	52.6%
Members	12	7
	42.9%	36.8%
General public	1	0
	3.6%	0.0%
None of the above	3	2
	10.7%	10.5%
<b>Total</b>	<b>32</b>	<b>19</b>
	<b>100.0%</b>	<b>100.0%</b>

**Make Reports Available for Purchase**

<b>Do you make your association's reports available for purchase?</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Yes	15	8
	53.6%	42.1%
No	13	11
	46.4%	57.9%
<b>Total</b>	<b>28</b>	<b>19</b>
	<b>100.0%</b>	<b>100.0%</b>

**Annual Sales Revenue from Reports by Annual Association Revenue\***

<b>Average Sales Revenue from Reports by Annual Association Revenue</b>	<b>Revenue: Industry sales and shipments program</b>	<b>Revenue: Operational benchmarking program</b>
Annual association revenue less than or equal to \$5M	\$50,167	\$7,750
Annual association revenue between \$5M and \$10	\$65,375	\$9,500
Annual association revenue greater than or equal to \$10M	\$22,790	\$2,000
All associations	\$43,892	\$7,249
Responses	12	7

\*Note: Only includes respondents who indicated that they make their reports available for purchase.

### Report Use and Promotion

How does your association promote or use the results from your research? (Select all that apply)	Industry sales and shipments program	Operational benchmarking program
Press releases	15	8
	55.6%	47.1%
Weekly newsletters	8	8
	29.6%	47.1%
Industry magazine	7	6
	25.9%	35.3%
Social media	8	8
	29.6%	47.1%
Infographics	9	1
	33.3%	5.9%
Webinars / industry events	19	5
	70.4%	29.4%
Other	7	5
	25.9%	29.4%
<b>Total</b>	<b>73</b>	<b>41</b>
	<b>100.0%</b>	<b>100.0%</b>

#### Industry sales and shipments program – Other:

website and marketing emails

Results used in presentation and other reports.

regulatory/advocacy work

Website, email

Internal use by members for their business operations and strategy

Advocacy on behalf of the industry and education to the public various media channels

We do not use these programs as promotion tools. They are a resource to the participating companies and we do not release the data outside of that group.

#### Operational benchmarking program – Other:

n/a. For internal use only.

email, online workrooms

These are primarily membership satisfaction surveys or salary studies of our staff. Many of these questions are not applicable.

We use it internally and via committees to make determinations about the Association's direction. the information is not released beyond the participating group

**Report Format**

What is the format of your association's reports? (Select all that apply)	Industry sales and shipments program	Operational benchmarking program
Aggregate industry results	28	16
	100.0%	84.2%
Executive summary	15	10
	53.6%	52.6%
Supplemental charts and graphs	18	13
	64.3%	68.4%
Customized reports	11	12
	39.3%	63.2%
Interactive reports	5	1
	17.9%	5.3%
Forecasting information or added analysis	12	0
	42.9%	0.0%
Other	2	0
	7.1%	0.0%
<b>Total</b>	<b>91</b>	<b>52</b>
	<b>100.0%</b>	<b>100.0%</b>

**Operational benchmarking program - Other:**

A database that includes monthly shipment data at brand level for the last five years

Comparison of international trends

**Obtain from Other Sources**

<b>Can members obtain similar industry information about sales and shipments from other sources?</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Yes	9	1
	32.1%	5.3%
No	19	18
	67.9%	94.7%
<b>Total</b>	<b>28</b>	<b>19</b>
	<b>100.0%</b>	<b>100.0%</b>

**Leading Source of Information**

<b>Are your association's reports viewed as the leading source of information on the industry?</b>	<b>Industry sales and shipments program</b>	<b>Operational benchmarking program</b>
Yes	8	1
	88.9%	100.0%
No	1	0
	11.1%	0.0%
<b>Total</b>	<b>9</b>	<b>1</b>
	<b>100.0%</b>	<b>100.0%</b>

**Competing Sources**

<b>Where are your members receiving the competing information? (Select all that apply)</b>	<b>Industry sales and shipments information</b>	<b>Operational benchmarking information</b>
Other non-profits	1	1
	5.0%	11.1%
Industry consultants	12	5
	60.0%	55.6%
Internal research	7	3
	35.0%	33.3%
Other	7	2
	35.0%	22.2%
<b>Total</b>	<b>27</b>	<b>11</b>
	<b>100.0%</b>	<b>100.0%</b>



# Staffing, Program Budget & Report Revenue by Annual Sales Volume

## NAM CMA Survey Research Benchmarking Survey

**Background:** Vault Consulting is conducting a survey on behalf of The National Association of Manufacturers' Council of Manufacturing Associations (CMA) to help its members benchmark their research activities. Associations are in a unique position to provide the leading source of information on their industry. Participating in this survey will allow you to see how your research efforts compare to your peers.

**Confidentiality:** Vault Consulting will aggregate the survey results before they are shared with CMA members.

**Results:** Aggregated survey results will be shared with CMA members and the results will be the focus of a session at the 2022 CMA Summer Leadership Conference.

**Important Note:** This survey should be completed by the individual in your association with direct oversight of research programs.

Please click here if you would like to view a PDF version of the entire survey prior to completing it.

This survey should take approximately 10 minutes to complete.

**Contact:** If you have any questions regarding this survey, please contact Mike Hayes at mhayes@vaultconsulting.com.

Please provide your contact information.

Note: Your contact information is required so that Vault Consulting can send you the aggregated survey results.

- Name: \_\_\_\_\_
- Association: \_\_\_\_\_
- Email: \_\_\_\_\_
- Phone Number: \_\_\_\_\_

## Research

Which of the following types of research does your association conduct? (Select all that apply)

- Industry sales and shipments programs (to help members measure their market share and track industry sales- units, dollars, price per unit, etc.)
- Economic outlook and analysis (detailed description of industry trends and the general economic factors that impact the industry)
- Operational benchmarking programs (compensation & benefits or financial & operating studies)
- Advocacy related research (research that will primarily be used for lobbying and advocacy efforts)
- Event research (to help the association determine event locations, attendance trends, exhibitor preferences, member feedback, etc.)
- Strategic research (internal purposes such as membership satisfaction)
- Other: \_\_\_\_\_

How many staff members are primarily dedicated to research at your association?

\_\_\_\_\_

Which, if any, of the following research programs are you managing with **only** internal staff? (Select all that apply)

- Industry sales and shipments programs
- Economic outlook and analysis
- Operational benchmarking programs
- Advocacy related research
- Event research
- Strategic research (internal purposes)
- Other: \_\_\_\_\_

Does your association have a research committee that meets periodically to discuss research activities?

- Yes
- No

Number of times per year on average that the committee meets:

\_\_\_\_\_

Does your association have a legal counsel approved antitrust policy for research programs?

- Yes
- No

**The following questions relate specifically to industry sales and shipments research.**

Please briefly describe your association's industry sales and shipments reports: (optional)

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How often does your association conduct industry sales and shipments programs? (Select all that apply)

- Monthly
- Quarterly
- Annual
- Bi-Annual
- Other \_\_\_\_\_

What is the approximate number of participants in your association's industry sales and shipments program?

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What is the estimated percentage of the industry represented in the published industry sales and shipments reports?

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**Program Operations**

What is the primary way participants submit data or information for your association's industry sales and shipments program?

- Email
- Upload to secure online web portal
- Online form / survey
- Other

Please describe the other ways participants submit data or information for your association's sales and shipments program:

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Who is able to participate in your association's industry sales and shipments program?

- Open only to members
- Open to everyone (members and non-members)
- Other

Please describe the other groups that are able to participate in your association's sales and shipments program:

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Are there any costs to participate in your association's industry sales and shipments program?

- Yes
- No

Who pays to participate in your association's industry sales and shipments program? (Select all that apply)

- Members
- Non-Members
- Other

Please describe the other groups that pay to participate in your association's sales and shipments program:

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What is the annual program management budget for your association's industry sales and shipments program (\$ US Dollars)? (if part of bigger budget please explain below)

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Please provide detail if the annual program management budget for your association's sales and shipments program is part of a bigger budget.

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Who is able to view your associations industry sales and shipments reports **free of charge**?  
(Select all that apply)

- Participants
- Members
- General public
- None of the above

Do you make your association's industry sales and shipments reports available for purchase?

- Yes
- No

Please report the average annual revenue from selling the industry sales and shipments reports (\$ US Dollars):

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How does your association promote or use the results from your industry sales and shipments research? (Select all that apply)

- Press releases
- Weekly newsletters
- Industry magazine
- Social media
- Infographics
- Webinars / industry events
- Other

Please describe the other ways your association promotes or use the results from your industry sales and shipments research:

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What is the format of your association's industry sales and shipments reports? (Select all that apply)

- Aggregate industry results
- Executive summary
- Supplemental charts and graphs
- Customized reports
- Interactive reports
- Forecasting information or added analysis
- Other

Please describe the other report formats of your association uses for industry sales and shipments research:

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Can members obtain similar industry information about sales and shipments from other sources?

- Yes
- No

Are your association's sales and shipments reports viewed as the leading source of information on the industry?

- Yes
- No

Where are your members receiving the competing information on sales and shipments from? (Select all that apply)

- Other non-profits
- Industry consultants
- Internal research
- Other

Please describe the other ways your members are receiving competing information on sales and shipments research:

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**The following questions relate specifically to operational benchmarking research.**

How often does your association conduct operational benchmarking programs? (Select all that apply)

- Monthly
- Quarterly
- Annual
- Bi-Annual
- Other: \_\_\_\_\_

What is the approximate number of participants in your association's operational benchmarking programs?

\_\_\_\_\_

What is the estimated percentage of the industry represented in the published operational benchmarking reports?

\_\_\_\_\_

**Program Operations**

What is the primary way participants submit data or information for your association's operational benchmarking program?

- Email
- Upload to secure online web portal
- Online form / survey
- Other

Please describe the other ways participants submit data or information for your association's operational benchmarking program:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Who is able to participate in your association's operational benchmarking program?

- Open only to members
- Open to everyone (members and non-members)
- Other

Please describe the other groups that are able to participate in your association's operational benchmarking program:

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Are there any costs to participate in your association's operational benchmarking program?

- Yes
- No

Who pays to participate in your association's operational benchmarking program? (Select all that apply)

- Members
- Non-Members
- Other

Please describe the other groups that pay to participate in your association's operational benchmarking program:

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What is the annual program management budget for your association's operational benchmarking program? (if part of bigger budget please explain below)

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Please provide detail if the annual program management budget for your association's operational benchmarking program is part of a bigger budget.

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Who is able to view your associations operational benchmarking reports **free of charge?**  
(Select all that apply)

- Participants
- Members
- General public
- None of the above

Do you make your association's operational benchmarking reports available for purchase?

- Yes
- No

Please report the average annual revenue from selling operational benchmarking reports:  
(\$ US Dollars)

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How does your association promote or use the results from your operational benchmarking research? (Select all that apply)

- Press releases
- Weekly newsletters
- Industry magazine
- Social media
- Infographics
- Webinars / industry events
- Other

Please describe the other ways your association promotes or uses the results from your operational benchmarking research:

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What is the format of your association's operational benchmarking reports? (Select all that apply)

- Aggregate industry results
- Executive summary
- Supplemental charts and graphs
- Customized reports
- Interactive reports
- Forecasting information or added analysis
- Other

Please describe the other report formats your association uses for your operational benchmarking research:

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Can members obtain similar industry information about operational benchmarking from other sources?

- Yes
- No

Are your association's operational benchmarking reports viewed as the leading source of information on the industry?

- Yes
- No

Where are your members receiving the competing information on operational benchmarking? (Select all that apply)

- Other non-profits
- Industry consultants
- Internal research
- Other

Please describe the other ways your members are receiving competing information on operational benchmarking research:

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**General and Wrap up**

We have just a few final questions as we wrap up.

Please share some unique and innovative features of your association's research:

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Would you be willing to share additional best practices with Vault in a follow up discussion? These best practices will be included in the final report. If you are willing to share additional best practices, Vault Consulting will contact you via the email address provided at the start of the survey.

- Yes
- No

You have completed the survey. Please click "Submit" to record your response.



## Questions and Follow-Up

If you have any questions regarding this report, please contact Mike Hayes at *Vault Consulting*, [mhayes@vaultconsulting.com](mailto:mhayes@vaultconsulting.com), or Shonzia Thompson at CMA, [sthompson@nam.org](mailto:sthompson@nam.org).

Please reach out to Mike Hayes at *Vault Consulting* if or have suggestions for future versions or other research topics that would be valuable to CMA members.

