# State of Associations Quarterly: 2024 Q3

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## Key findings

- **Organizations with a signature annual conference or trade show report a median non-dues revenue share of 35 percent**, against 10 percent for organizations without one.
- Event revenue — registration fees and exhibit space combined — is the largest single non-dues category across the sample, ahead of sponsorship and product sales.
- **The median organization draws 31 percent of its sponsorship revenue from a single largest sponsor**, a concentration that rises at smaller organizations.
- Product and publication sales, while the smallest non-dues category overall, are the most stable year to year of any source in the sample.

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## Why non-dues revenue, and why this quarter

State of Associations 2024 reported that non-dues revenue makes up a median of 24 percent of total budget across the sector, with wide variation by organization. That figure alone tells a board little about where the money actually comes from, or what would have to change to grow it. This brief breaks the 24 percent into its component parts.

## The 24 percent median, broken into parts

Across the sample, non-dues revenue splits roughly as follows: event revenue accounts for the largest share, followed by sponsorship, then product and publication sales, with a residual "other" category covering grants, advertising, and miscellaneous income. Event revenue's dominance holds across nearly every sector and budget size in the sample.

## The event effect

Organizations that run a signature annual conference or trade show report a median non-dues revenue share of 35 percent of total budget — well above the 24 percent sample median. Organizations without a flagship annual event report a median share of only 10 percent, relying more heavily on smaller sources like publication sales and one-off sponsorships.

Director of Research Inês Carvalho-Reyes said the finding has a clear implication for associations weighing whether to launch a new signature event. "A conference or trade show is the single biggest lever an association has over its own non-dues revenue. Nothing else in this data comes close, but it's also the option with the most operational risk and the longest runway to break even."

The gap holds across sectors, though the magnitude varies. Trade and manufacturing associations, which more often run an annual conference paired with a trade show floor, show the widest gap between event-hosting and non-event-hosting organizations. Health care and education associations, which run signature events less consistently across the sample, show a narrower gap — suggesting the event effect depends on the event actually functioning as a trade-show-style draw for exhibitors and sponsors, not merely as an annual gathering of members.

## Sponsorship concentration

The median organization in the sample draws 31 percent of its total sponsorship revenue from a single largest sponsor. That concentration rises at smaller organizations — associations with fewer than ten staff report a median of 44 percent from their top sponsor, against 22 percent at organizations with more than twenty-five staff. A concentrated sponsor relationship isn't inherently a problem, but it is a specific risk: the departure of one sponsor at a small association can remove a meaningfully larger share of non-dues revenue than the same departure would at a larger one.

## Product and publication sales: small but stable

Product and publication sales make up the smallest non-dues category in the sample on average, but show the least year-to-year variation of any source measured. Organizations that reported product or publication revenue in both survey years showed changes within 8 percent of the prior year's figure, compared to swings of 20 percent or more common in event and sponsorship revenue tied to a single year's attendance or sponsor roster.

## A note on the "other" category

The residual "other" category — grants, advertising, and miscellaneous income not captured elsewhere — makes up the smallest share of non-dues revenue across the sample, but shows the widest variation by sector. Associations with a philanthropic foundation attached, like NANA's own Foundation structure, report a meaningfully larger "other" share than associations without one, driven mostly by institutional grant revenue that doesn't fit neatly into event, sponsorship, or product categories.

The research team is watching this category closely for a future edition of this brief, since grant-funded programs carry a different risk profile than earned revenue: a grant can end on a funder's timeline rather than the association's own, in a way that event and sponsorship revenue generally does not.

## What this means for budget planning

- A signature annual event is the strongest single driver of non-dues revenue in this data, but carries the most year-to-year volatility and the highest up-front cost
- Sponsorship revenue concentrated in one sponsor is a specific budget risk worth naming to a finance committee, particularly at smaller organizations
- Product and publication revenue, while modest, is the most reliable non-dues line to budget against from one year to the next
- Organizations with grant-funded "other" revenue should track that funding's end date as a budget risk separate from ordinary earned-revenue volatility
- Associations weighing a new signature event should benchmark against organizations of similar sector and size in this data before assuming the full 35 percent figure applies to their own situation

The research team plans to revisit sponsorship concentration specifically in a future brief, since several respondents flagged it as a board-level concern this quarter's sample wasn't large enough to break out by sector.