GrowthZone surveyed over 100 real estate association professionals across the U.S. and Canada. Topics included everything from relocation activity and revenue sources, to the NAR© code of ethics and MLS waiver policies. The results showed a number of interesting trends impacting today’s associations.

### ABOUT THE RESPONDENTS

#### NUMBER OF MEMBERS | PREDICTED MEMBER COUNT ON 1/1/2021

- **UNDER 200**: 15%
- **200-500**: 23%
- **501-1,000**: 17%
- **1,001-2,500**: 17%
- **2,501-5,000**: 10%
- **5,001-10,000**: 8%
- **10,001-25,000**: 6%
- **25,001-50,000**: 3%
- **OVER 50,000**: 2%

#### ANNUAL OPERATING BUDGET | APPROXIMATE

- **UNDER $250K**: 30%
- **$250K+ - $500K**: 20%
- **$500K+ - $1M**: 18%
- **$1M+ - $3M**: 17%
- **$3M+ - $5M**: 7%
- **$5M+ - $10M**: 5%
- **$10M+ - $20M**: 1%
- **$20M+**: 2%

*Due to rounding and check box questions, percentages may exceed or not appear to add up to 100%
**MEMBERSHIP GROWTH**

**ANNUAL OVERALL NET MEMBERSHIP**

- **INCREASED** | Respondents reporting a higher overall membership count: 57%
- **DECREASED** | Respondents reporting a lower overall membership count: 2%
- **UNCHANGED** | Respondents reporting no change in overall membership count: 41%

**ANNUAL OVERALL NEW MEMBERSHIP**

- **INCREASED** | Respondents reporting a higher overall membership count: 72%
- **DECREASED** | Respondents reporting a lower overall membership count: 3%
- **UNCHANGED** | Respondents reporting no change in overall membership count: 26%

**ANNUAL OVERALL RENEWAL RATE**

- **INCREASED** | Respondents reporting a higher overall renewal rate: 30%
- **DECREASED** | Respondents reporting a lower overall renewal rate: 3%
- **UNCHANGED** | Respondents reporting no change in overall renewal rate: 67%

Learn how to effectively onboard new members with the New-Member Onboarding Checklist and Schedule.

Get it Here
MEMBER ENGAGEMENT

OVERALL MEMBER ENGAGEMENT

25% BETTER
50% ABOUT THE SAME
23% WORSE
3% OTHER/UNSURE

MEMBER ENGAGEMENT CHANGES | HOW MUCH HAS COVID CONTRIBUTED TO THIS CHANGE IN THE ENGAGEMENT RATE?

RESPONDENTS INDICATING INCREASED ENGAGEMENT SAID COVID HAS HAD:

- MAJOR IMPACT: 46%
- SOME IMPACT: 27%
- NO IMPACT: 4%
- NOT SURE: 23%

RESPONDENTS INDICATING DECREASED ENGAGEMENT SAID COVID HAS HAD:

- MAJOR IMPACT: 96%
- SOME IMPACT: 4%
- NO IMPACT: 0%
- NOT SURE: 0%

VALUE PROPOSITION

Organizations with 201-500 members were most likely to report their members “definitely” recognize their value proposition.

Those with an operating budget from $500K-$1M were most likely to report their members vaguely recognize their value proposition.
### MEMBER RECOGNITION

Do you think members recognize your association’s value proposition?

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<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>DEFINITELY</td>
<td>23%</td>
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<tr>
<td>SOMewhat</td>
<td>62%</td>
</tr>
<tr>
<td>VAGUELY</td>
<td>13%</td>
</tr>
<tr>
<td>NO</td>
<td>1%</td>
</tr>
<tr>
<td>UNSURE</td>
<td>1%</td>
</tr>
</tbody>
</table>

### COVID IMPACT

In general, how would you say COVID has affected members’ opinions of your organization’s value proposition?

- POSITIVE IMPACT: 51%
- NO DIFFERENCE: 33%
- NEGATIVE IMPACT: 6%
- UNSURE: 10%

Of organizations reporting their members “definitely” recognize their value proposition, 68% felt COVID has had a positive impact on members’ perception of value.

### OPERATIONS STATUS

What is the current operational status of your organization?

- REDUCED/LIMITED LEVEL OF OPERATIONS: 27%
- ABOUT THE SAME LEVEL OF OPERATIONS: 51%
- EXPANDED LEVEL OF OPERATIONS: 20%
- TEMPORARILY CLOSED: 2%
- PERMANENTLY CLOSED/DISBANDED: 0%

Which of the following best describes your organization's current remote/work-from-home arrangements?

- MOST EMPLOYEES WORK ON-SITE: 34%
- ALL EMPLOYEES WORK ON-SITE: 20%
- SOME EMPLOYEES WORK ON-SITE: 14%
- MOST EMPLOYEES WORK FROM HOME/REMOTELY: 33%

The referenced work arrangements:

- WERE ALREADY STANDARD PRIOR TO COVID: 36%
- WERE ESTABLISHED IN RESPONSE TO COVID: 64%

Of organizations indicating reduced operations, 1/4 have 501-1K members.

Visit How to Thrive During and After a Pandemic for recovery tips in a COVID-19 world.

Get it Here
EVENTS
Since the onset of COVID in mid-March, how did/will your organization handle its 2020 MAJOR, in-person event(s)? (e.g., annual meeting/banquet, conference, trade show, etc.)

- 2% N/A: A 2020 event was not ever planned
- 15% N/A: Took place “pre-COVID” (in early 2020)
- 30% Was still held in-person
- 4% Was canceled/postponed (didn’t/won’t occur in 2020)
- 32% Scheduled or planned to be held virtually instead (before 12/31/20)
- 9% Scheduled or planned to be held in-person (before 12/31/20)
- 7% Other: Had both pre-COVID event(s) and had/will have event(s) since COVID onset

EVENT RESULTS | THOSE WHO HELD VIRTUAL EVENTS
Overall, under current circumstances, how would you rate the success of the virtual event(s)? (Not in comparison to past years or in-person events.)

- 74% Successful
- 16% Neither successful nor unsuccessful
- 6% Amazing
- 0% Unsuccessful
- 3% Disastrous
COVID RELIEF | GOVERNMENT PROGRAMS

Please indicate if, since the emergence of COVID, your organization has received assistance from any of these SPECIFIC relief programs:

- **PAYCHECK PROTECTION PROGRAM (PPP)**
  - Applied, but has not yet received any assistance: 9%

- **ECONOMIC INJURY DISASTER LOAN (EIDL)**
  - Applied, but assistance was denied: 5%

- **FFCRA (EMPLOYER REIMBURSEMENT FOR EMPLOYEE SICK/FAMILY LEAVE WAGES)**
  - Did not apply: 1%

- **EMPLOYEE RETENTION CREDIT (TAX CREDIT FOR BUSINESSES IMPACTED BY A SHUTDOWN)**
  - Not sure: 2%

- **SBA DEBT RELIEF AND/OR EXPRESS LOANS**
  - Did not apply: 5%

WE HAVE NOT RECEIVED ASSISTANCE FROM ANY OF THESE SPECIFIC PROGRAMS: 90%

Respondents not receiving assistance from the programs listed above indicated their organization:

- **APPLIED, BUT HAS NOT YET RECEIVED ANY ASSISTANCE**: 2%

- **APPLIED, BUT ASSISTANCE WAS DENIED**: 1%

DID NOT APPLY: 92%

- **NOT SURE**: 5%

Since the onset of COVID, has your organization received any grants, loans, relief funding, assistance, etc. from any sources OTHER than those listed above?

- **NO**: 78%

- **UNSURE**: 6%

- **YES**: 7%
**MLS**
Does your organization own and/or operate the primary MLS used by its members?

- **YES**: 50%
- **NO**: 41%
- **OTHER**: 10%

Of those responding “Other,” the majority indicated their organization is a shareholder in a regional MLS.

**DOES YOUR ORGANIZATION USE A LOCK BOX SYSTEM?**

- **YES**: 81%
- **NO**: 17%
- **OTHER**: 2%

**NON-DUES REVENUE**

We asked: In an average year, approximately how much of your total revenue comes from non-dues sources?

- **29%**
Has there been a shift in the average amount of relocation activity in your area since the onset of COVID (i.e., people moving to the area vs. leaving the area)?

- **BUYERS**
  - 23% DECREASE
  - 16% ABOUT THE SAME
  - 59% INCREASE

- **SELLERS**
  - 23% DECREASE
  - 31% ABOUT THE SAME
  - 25% INCREASE

If you could see 5 years into the future, what would you predict will be the biggest change for real estate associations?

- 24% MLS
- 22% TECHNOLOGY
- 22% CONSOLIDATION
- 20% MISCELLANEOUS
- 13% VIRTUAL OPERATIONS
- 9% REMOTE WORK
- 9% EDUCATION
- 9% VIRTUAL MEETINGS/ EVENTS

**PREDICTIONS | COMMENTS FROM SURVEY RESPONDENTS**

- **MLS**
  - Realtors© not joining an association because of online agencies like Zillow.
  - I would predict that there may be a development of a national MLS or database of some kind which could drastically impact real estate associations.
  - MLS changes with consumers - will affect the “requirement” to be a member.
  - There will be no ability to depend on MLS funding.
  - No control over their own MLS data.

- **CONSOLIDATION**
  - All local associations will merge into State associations with regional districts.
  - Maintaining value and awareness in a consolidation environment.
  - Many smaller associations will close or merge into larger associations.
  - Combined, regional, and/or national MLSs will cause many local boards to reduce staff size.

- **REMOTE WORK**
  - More employees working from home, more consolidation and big data information from our AMS.
  - With the effects of COVID-19 fresh in memory, I can see more and more association employees working from home and do away with the need for a physical office.
In the past 12 months, has your organization made changes to its Diversity & Inclusion policies/practices in an effort to improve equity and support for employees and/or members?

- Yes: 36%
- No: 41%
- Unsure: 23%

Updated D&I practices were most common among organizations falling into at least one of the following categories:
- 201-500 members
- An operating budget of $1m-$3m
- Improved year-over-year engagement rates

How much did the 2018 changes to MLS waiver policies (statements 7.42 and 7.43, effective on July 1, 2018) impact your organization?

- A Great Deal: 3%
- A Lot: 1%
- A Moderate Amount: 11%
- A Little: 14%
- Not at All: 24%
- Unsure: 36%
- NA/Other: 12%
How would you describe member sentiment regarding updates to Article 10 of the NAR Code of Ethics (discriminatory speech and conduct)?

<table>
<thead>
<tr>
<th>MEMBERS SUPPORTIVE OF NEW STANDARDS:</th>
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<tbody>
<tr>
<td>LESS THAN 20%</td>
<td>15%</td>
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<tr>
<td>20-39%</td>
<td>8%</td>
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<tr>
<td>40-59%</td>
<td>11%</td>
</tr>
<tr>
<td>60-79%</td>
<td>8%</td>
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<tr>
<td>80-100%</td>
<td>17%</td>
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<tr>
<td>PREFER NOT TO ANSWER</td>
<td>42%</td>
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<thead>
<tr>
<th>MEMBERS OPPOSED TO NEW STANDARDS:</th>
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<tbody>
<tr>
<td>LESS THAN 20%</td>
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</tr>
<tr>
<td>40-59%</td>
<td>5%</td>
</tr>
<tr>
<td>60-79%</td>
<td>3%</td>
</tr>
<tr>
<td>80-100%</td>
<td>2%</td>
</tr>
<tr>
<td>PREFER NOT TO ANSWER</td>
<td>44%</td>
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<table>
<thead>
<tr>
<th>MEMBERS HAVE NOT EXPRESSED AN OPINION:</th>
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<tbody>
<tr>
<td>LESS THAN 20%</td>
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<tr>
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<tr>
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<td>26%</td>
</tr>
<tr>
<td>PREFER NOT TO ANSWER</td>
<td>33%</td>
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</table>
We asked: Any words of wisdom you’d like to share with your colleagues or peers?

- It’s okay not to get to everything on your desk. Stop, breathe, and get done what you can each day. Learn to delegate and prioritize.
- Team brainstorming and idea sharing is a necessity. Don’t think that you know everything, no matter how long you’ve worked in your position/organization/etc.
- Hang in there... together we will get through this.
- Cut the fat and brainstorm more.
- Listen to members better and give them what they are asking for.
- Don’t be afraid to try something new, just be prepared to explain it.
- Reach out to members often and with intent.
- Get an intern so you can learn how the younger generations DO customer service.
- This too shall pass.
- Ask questions from anyone and everyone that can help you!
- The real estate industry will undergo transformational, technology-driven changes, and significant consolidation on all levels, in the next few years.
- Be prepared to be very independent, and very tech-savvy, to thrive in the new real estate world order.
- Roll with the punches.
- You will NEVER make everyone happy. For as many people who are upset with your work/decision even more are in support of it. Always remember you work for the good of the whole.
- Ask NAR© to stop adding more requirements. Our local leadership should guide our decisions.
- Change is not easy, but nothing worth doing is ever easy. Patience and relentless forward motion will change the processes to achieve goals and make sustainable changes.
- The pandemic and its economic consequences will not last forever, and your employees will remember when they were not given the appreciation or compensation they deserved.
- Don’t let your directors use the pandemic as an excuse to not give raises or bonuses, especially since real estate is one of the few industries that is actually doing well right now.
- Hang in there! Support your members and they will support you.
- Customer service is key for members. Embrace technology. Be willing to be flexible.
- Do your job and do it as best you can but remember, this isn’t life or death.
<table>
<thead>
<tr>
<th>COMMON CHALLENGES</th>
<th>TECHNOLOGY</th>
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<tbody>
<tr>
<td>Technology</td>
<td>AMS not keeping up with the times and BIG Data.</td>
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<td></td>
<td>Costly technology expenditures.</td>
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<td></td>
<td>Too many systems to effectively manage communications.</td>
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<td></td>
<td>Not having an AMS.</td>
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<tr>
<td>COVID</td>
<td>Lack of member volunteers.</td>
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<td></td>
<td>Getting more members involved online.</td>
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<td></td>
<td>Lack of member interest to serve on committees or in leadership roles.</td>
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<thead>
<tr>
<th>MISCELLANEOUS</th>
<th>ENGAGEMENT</th>
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<tbody>
<tr>
<td>Members and directors are slow to accept change.</td>
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<tr>
<td>Rules and regulations.</td>
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<tr>
<td>The sheer volume of change.</td>
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<tr>
<td>Old precedents established in era of too much member hand-holding. It has resulted in their unwillingness to move forward and gain expertise to run their business in a technological world.</td>
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<tr>
<td>Lack of member volunteers.</td>
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<thead>
<tr>
<th>TIME</th>
<th>TECHNOLOGY</th>
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<tbody>
<tr>
<td>Too many check boxes and not enough hands on deck.</td>
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<tr>
<td>Time... we are relatively small so all employees wear many hats.</td>
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<tr>
<td>Not enough time.</td>
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<thead>
<tr>
<th>COMMUNICATION</th>
<th>TECHNOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>The agents not responding to emails and information requested from them.</td>
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</tr>
<tr>
<td>Working in silos within the office and no communication between the board and staff.</td>
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<tr>
<td>Being able to effectively communicate with the membership as a whole.</td>
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<thead>
<tr>
<th>STAFF</th>
<th>TECHNOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not enough staff.</td>
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<tr>
<td>Understaffed.</td>
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<thead>
<tr>
<th>MEMBERSHIP</th>
<th>TECHNOLOGY</th>
</tr>
</thead>
<tbody>
<tr>
<td>The number of &quot;problem&quot; calls about untrained agents.</td>
<td></td>
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<tr>
<td>Agents think that I am the expert even though that is their broker's role.</td>
<td></td>
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<tr>
<td>Members that don't actually know what the association does or how it runs.</td>
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IMPROVEMENTS

We asked: In the past 12 months, what (if any) change(s) has your organization made that improved your job efficiency, productivity, satisfaction, etc.?

COMMON IMPROVEMENTS

- Working remotely
- Technology
- Videoconferencing
- Processes/Operations
- Miscellaneous
- Staffing changes

COMMENTS FROM SURVEY RESPONDENTS | WORK IMPROVEMENTS

- Allowing work from home and more flexible schedules.
- Better website, communication plan, calendar is tighter and organized, and purchased virtual classroom equipment.
- Increased the number of instructional videos for the members.
- Working from home has increased my overall life satisfaction and has given the flexibility to be both a great employee and a great parent.
- Considering a merger with other associations to eliminate redundant tasks/costs and to broaden the volunteer pool.
- Used the system we had in place but never used.
- Setting aside the first hour and last 2 hours of the day for staff to work uninterrupted. No meetings or walk-ins.
- Moving all files to cloud storage to make working remotely easier.
- Signed a contract with GrowthZone AMS and also delegated more responsibilities to committees.
- Less in-person and more virtual interaction has been a time saver.
- Upgrading systems and software has helped.
- We continue to embrace technology, and drive internal changes, adopting best-in-class technology and operational practices to the benefit of our members.
- Switching to GrowthZone AMS.

Regardless of organization size, respondents indicated the #1 most helpful change has been the shift to remote work arrangements.
ABOUT GROWTHZONE

The GrowthZone mission is to empower organizations with the tools they need to grow membership, keep members engaged, keep members longer, and do more in less time.

GrowthZone is a full Membership Management System with **built-in payment processing**, **e-commerce**, **fundraising**, **marketing automation**, **member prospecting**, and more. GrowthZone is ideal for chambers of commerce, business, trade, and professional associations.

Schedule a quick, no-pressure demo to see GrowthZone Real Estate Edition in action.

SCHEDULE DEMO

GrowthZone features a comprehensive suite of productivity modules for membership organizations, including:

- NAR© Integration
- Website Content Management
- Email Marketing Automation
- Fundraising
- Billing
- Event Registration
- Event Exhibitor/Session Management
- MLS Interface
- Lockbox Integrations
- Membership Prospecting
- Payment Processing
- Certification Tracking
- Chapter Management
- Mobile Staff App
- Website Hosting
- NAR© Ecommerce Interface
- Advertising/Sponsorship
- Online Store
- Project Management
- Form Builder
- Job Boards
- Contacts
- Communication
- Lists/Committees
- Fundraising

www.growthzone.com/real-estate