THE STRATEGIC OUTLOOK FOR ASSOCIATION LEARNING BUSINESSES

2026



LEADING LEARNING™

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Executive Summary

The Strategic Outlook for Association Learning Businesses 2026 continues our efforts to understand the trends and issues shaping the business of lifelong learning, continuing education, and professional development. At its core is data collected via an online, non-statistical survey between September 2 and October 22, 2025. We received 156 qualifying responses from market-facing learning businesses—entities that sell continuing education, professional development, and other lifelong learning experiences to adult learners. Of these, 107 responses came from associations, and only those responses inform this report.

What is a **learning business**?

Learning businesses are market-facing organizations that play an essential role in providing continuing education, professional development, and lifelong learning.

Trade and professional associations; commercial training and consulting firms; nonprofit training and consulting firms; and college and university professional, continuing, and online (PCO) units are all learning businesses.

Since 2020, we have surveyed learning businesses annually on key trends and issues. This year marks the first time we are issuing a full report on the results. In doing so, we return to our roots and to our long-held belief that good data informs sound decision-making. From 2009 to 2017, we surveyed associations on their technology-enabled learning offerings and issued a series of publications: *Association E-learning* (2009) and *Association Learning + Technology* (2011, 2014, 2016, and 2017). This report builds on that history as the landscape of learning continues to evolve and offers a picture of the pressures and possibilities shaping the future.

A Framework for Understanding Learning Businesses: Reach, Revenue, and Impact

While learning businesses vary widely in size, structure, and market, they share three fundamental goals: reach, revenue, and impact.

- **Reach** involves identifying who you can and should serve, then connecting with as many of those learners as possible. Reach is not merely about volume; it is about cultivating the right learners.
- **Revenue** is the financial fuel that keeps the learning business going. Even associations offering education as a member benefit seek to maximize revenue because revenue drives mission delivery.
- **Impact** reflects the relevance, effectiveness, and value of a learning business. Organizations that create meaningful impact—for individuals, organizations, and entire professions—thrive. Those that do not struggle in a landscape where time, attention, and money are acutely contested.

We use reach, revenue, and impact as core lenses to organize this report, following an opening section on strategic direction.

Three Strategic Takeaways for 2026

This year's survey data reveals a sector that recognizes the growing importance of education but is also grappling with rising expectations, evolving workforce needs, and internal constraints. Across the findings, three themes stand out as particularly significant for association learning businesses.

- **Strategic clarity is an existential issue.**
  Associations have ambitious goals—growing revenue, sharpening workforce relevance, and deepening learner engagement rank among the highest priorities. But ambition alone is insufficient. The data underscores the importance of strategic clarity: a grounded understanding of organizational purpose, learner and employer needs, and where the association's most meaningful contributions lie. Strategic clarity is necessary when a learning business is making tough choices about investment, differentiation, and program design. It is the foundation for translating aspiration into sustainable progress.
- **Capacity is the primary constraint.**
  Limited staffing, insufficient marketing and sales capacity, lack of specialized expertise, and competing internal priorities emerge as dominant themes across the responses to multiple survey questions. Small teams, constrained marketing reach, and competing internal priorities shape what learning businesses can realistically accomplish. Demand is not the problem; capacity is. Strengthening capacity—whether through staff, partnerships, technology, or process optimization—is one of the highest-leverage opportunities for improving reach, revenue, and impact.
- **Credibility drives differentiation.**
  Associations possess distinctive strengths: deep expertise, standards, certifications, research, and long-standing trust in their fields. Yet many respondents acknowledge they are not fully leveraging these advantages. Differentiation in an increasingly competitive learning landscape depends on credibility and on aligning offerings with the authoritative assets only that particular association can provide. We refer to the combination of these trusted, hard-to-replicate organizational assets as Credibility Capital™ (more on this concept later in the report). When learning portfolios intentionally and fully align with this capital, offerings stand out, value becomes clearer, and impact deepens.

A Year for Focus and Discipline

Each of the three takeaways speaks to the vital necessity of focus and discipline. Sometimes the most pressing decisions a learning business faces are as much about what *not* to do as they are about what to do. Associations that ground their decisions in strategic clarity, invest in the capacity required to execute effectively, and leverage their credibility with intention will be best positioned to expand their reach, generate sustainable revenue, and deliver meaningful impact.

The pages that follow explore how these themes appear in the data—and what they signal for the learning businesses shaping the future of their professions and industries. ▸

The Strategic Direction of Association Learning Businesses

Associations have clear ambitions for their learning businesses—and there are equally clear pressures shaping those ambitions. The survey data shows a sector that is striving for growth, alignment with workforce needs, and deeper learner engagement, all while navigating capacity limitations and responding to evolving expectations and emerging technologies, such as artificial intelligence. This section outlines the strategic priorities, drivers, and trends that define the landscape for learning businesses in the coming year.

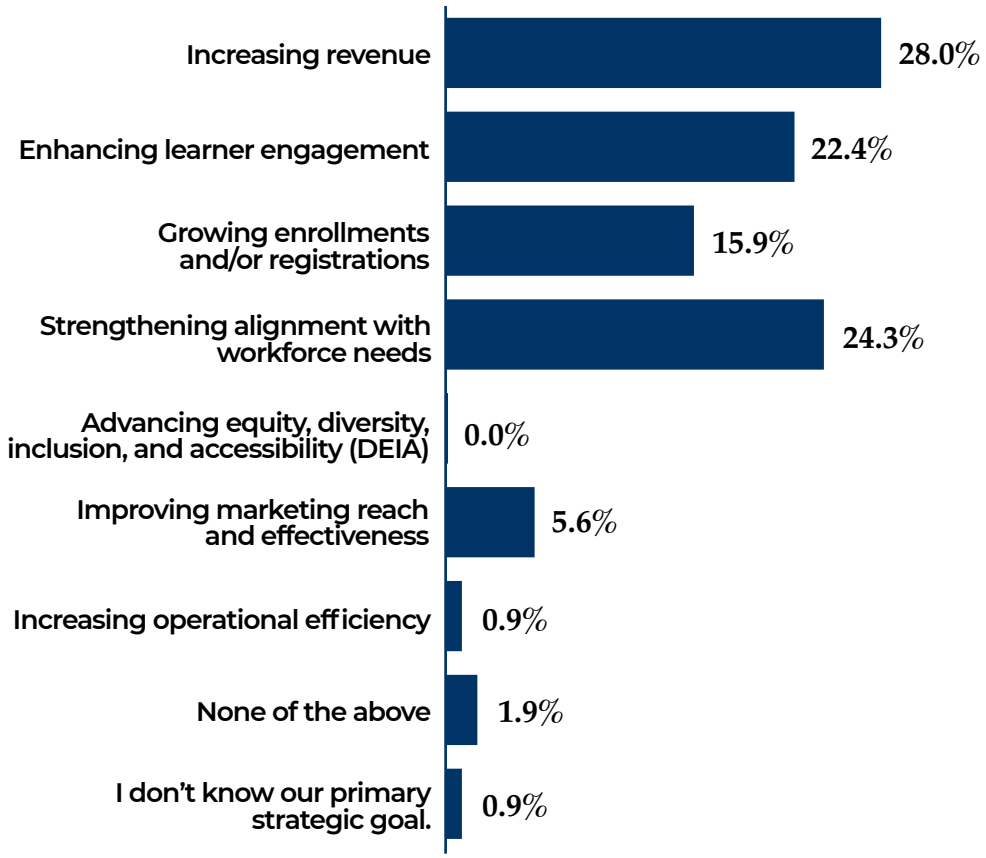
What They Aim to Achieve: Strategic Goals

When asked to identify a single **primary strategic goal** for their education offerings in 2026, respondents most frequently selected **increasing revenue (28.0 percent).** This underscores the financial significance of education portfolios in many associations, particularly as other non-dues revenue sources face pressure.

Two closely related goals follow:

- **Strengthening alignment with workforce needs (24.3 percent)**
- **Enhancing learner engagement (22.4 percent)**

Which of the following most closely aligns with your primary strategic goal for your education offerings in 2026? Select one. (107 responses)



Together, these goals reflect a growing recognition that financial sustainability depends not only on selling more but on offering learning that is directly responsive to workforce realities and that keeps learners meaningfully involved. Workforce shifts—reskilling, upskilling, changing role demands—and engagement continue to be persistent challenges.

A smaller but notable share (15.9 percent) identify growing enrollments and/or registrations as their primary goal. Coupled with the emphasis on engagement, this suggests that reach and retention are both critical elements of strategic success.

Respondents' secondary goals reinforce the same pattern. The most common **secondary strategic goal** is **growing enrollments and/or registrations (26.4 percent),** followed by **increasing revenue (23.6 percent)** and **enhancing learner engagement (18.9 percent).**

Viewing primary and secondary goals together, a clear picture emerges of associations prioritizing financial health, alignment with workforce needs, and stronger participation and engagement. This triangulation reflects the evolving reality of running a learning business. Offerings must be financially viable, strategically aligned with employer needs, and genuinely compelling for learners.

Which of the following most closely aligns with your secondary strategic goal for your education offerings in 2026? Select one. (106 responses)

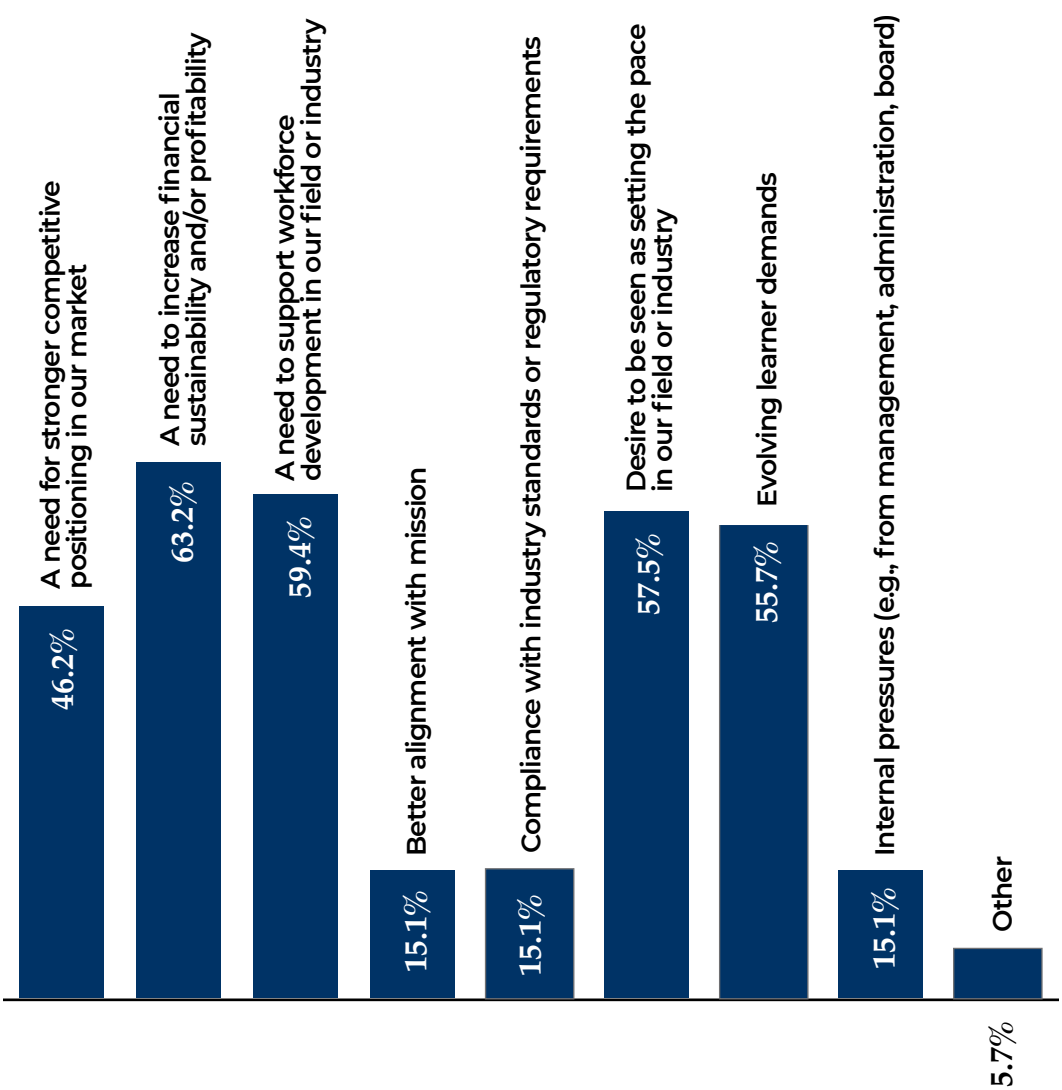


The Strategic Drivers Behind the Goals

Four drivers, selected by the majority of respondents, stand out as shaping those primary and secondary strategic goals:

- **A need to increase financial sustainability and/or profitability (63.2 percent)**
- **A need to support workforce development in the field or industry (59.4 percent)**
- **A desire to be seen as setting the pace in the field or industry (57.5 percent)**
- **Evolving learner demands (55.7 percent)**

Which of the following do you consider the most important drivers for your top strategic goals for your education offerings? Select all that apply. (106 responses)



These drivers echo the strategic goals and provide deeper insight:

- The financial imperative reinforces why revenue growth and enrollment increases top the list of primary and secondary strategic goals, respectively.
- Workforce development alignment reflects the broader shifts affecting nearly all professions—employers are seeking verifiable skills, and associations want to play a central role in delivering them.
- The desire to set the pace connects to competitive positioning. Associations aspire not just to meet market expectations but to lead their markets.
- Learner expectations for flexibility, personalization, and relevance are rising, along with competition.

A need for stronger competitive positioning is driving the goals of **46.2 percent** of respondents. Associations are acutely aware of increasing competition from commercial providers, employers' internal training teams, and AI.

What's Influencing the Landscape: Key Trends and Issues for 2026

When asked to rate the importance of major trends and issues in influencing their learning business's strategy, respondents highlighted three top influences:

- **Workforce and employer needs, such as job readiness, upskilling, and reskilling (weighted average 3.73)**
- **Learner preferences for flexibility in formats and scheduling (3.66)**
- **Providing more personalized learning experiences (3.51)**

Respondents rated each trend or issue on a scale from not important (1 point) to critical (5 points). The weighted averages cited above combine all responses on the 1-to-5 scale into a single score that reflects both how many respondents selected each rating and the importance level they selected.

Associations know they need to position their education offerings as a mechanism to help learners and employers adapt to rapidly changing professional environments. Flexibility in time, place, and mode has become a baseline expectation, not a differentiator, and personalization is increasingly recognized as essential to learner engagement and relevance.

Other influential trends and issues include:

- **Advances in artificial intelligence (3.31)**
- **Increasing competition from other learning providers (3.27)**
- **Virtual and/or hybrid events (3.19)**

These three reflect the shifting environment in which associations operate. AI is reshaping content production and learner support; competition continues to intensify; and online delivery remains a durable part of the post-pandemic education mix.

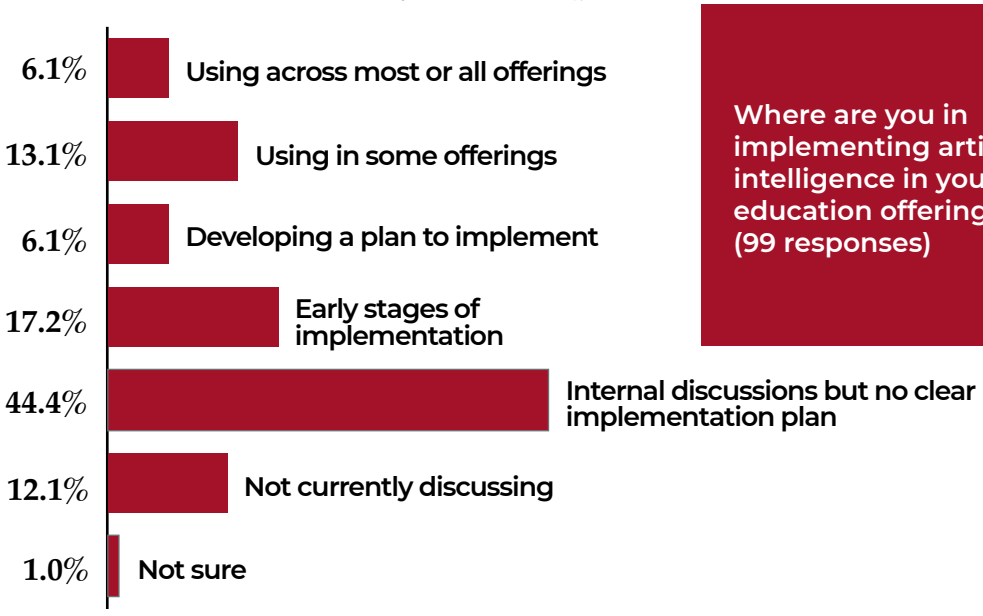
How important is each of the following trends and issues to your learning business's strategy in 2026? (103 responses)

	Not important	Somewhat important	Important	Very important	Critical	Weighted average
Advances in AI	5.8%	16.5%	30.1%	35.9%	11.7%	3.31
Workforce and employer needs	2.0%	10.8%	24.5%	38.2%	24.5%	3.73
Learner preferences for flexibility	0.0%	10.8%	30.4%	41.2%	17.6%	3.66
Providing more personalized learning	1.0%	16.5%	24.3%	46.6%	11.7%	3.51
Increasing competition from other providers	8.7%	19.4%	24.3%	31.1%	16.5%	3.27
Growth in alternative credentialing	18.4%	24.3%	19.4%	24.3%	13.6%	2.90
Virtual and/or hybrid events	5.9%	25.5%	27.5%	26.5%	14.7%	3.19
DEIA in education offerings	13.9%	35.6%	28.7%	17.8%	4.0%	2.62

AI's Role: Widespread Interest, Limited Readiness

As just discussed, artificial intelligence was not at the top of the list of trends and issues influencing learning business strategy, but AI is undeniably a factor in the way learning is developed, delivered, and interacted with. The data show that most associations are still early in their adoption.

Where are you in implementing artificial intelligence in your education offerings? (99 responses)



The largest swathe of respondents **(44.4 percent)** say they are **having internal discussions but don't have a clear implementation plan.** The next largest grouping of respondents **(17.2 percent)** are in the **early stages of AI implementation** (e.g., pilots). Only **13.1 percent** are **actively using AI in some offerings,** and **6.1 percent** are **using AI across most or all of their offerings.**

This data suggests strong awareness but limited readiness. AI is seen as important, yet many associations don't have the strategy, staffing, infrastructure, or policies in place to leverage it confidently.

We asked respondents who indicated they're developing a plan for AI, piloting AI, or using AI in some or all of their offerings how they're using (or planning to use) AI. The **strongest current usage** is **content creation or curation (50.0 percent),** with another **35.7 percent planning to** use AI that way in the year ahead. **Analyzing aggregate learner data** shows the strongest planned growth—**31.0 percent currently use** AI for that purpose, and another **50.0 percent plan to** in 2026.

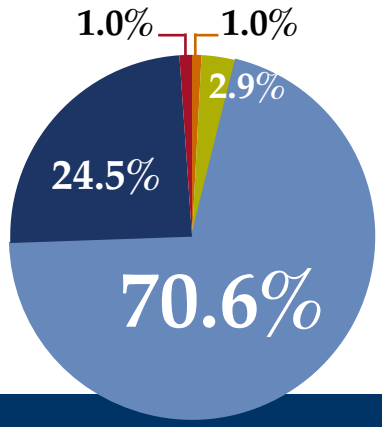
Other applications—administrative and marketing support, learner support, predictive analytics, personalization and adaptive pathways—attract meaningful planning interest but remain less widely adopted. And keep in mind that this is already a subset of respondents.

Overall, associations see AI as useful for increasing efficiency, relevance, and insight, but most are still figuring out where and how to leverage it.

How Confident Are Associations in Achieving Their Goals?

Most associations **(70.6 percent)** are **somewhat confident** about their ability to achieve their top strategic goals.

The glass-half-full take is that a strong majority show some confidence. The glass-half-empty view is that only a quarter **(24.5 percent)** are **very confident,** and **only a single respondent** is **extremely confident.** Arguably, if an organization can't achieve its top strategic goals, that should raise questions about how long the organization can survive.



Given your learning business's current resources, how confident are you in achieving your top strategic goals for 2026? (102 responses)

Not at all confident · Not so confident · Somewhat confident · Very confident · Extremely confident

What the Strategic Landscape Suggests for 2026

If we consider the strategic goals, drivers, trends and issues, and confidence data together, we see that the path forward for association learning businesses will require balancing financial sustainability with learner-centered design, staying attuned to workforce shifts, and building the internal capacity to adopt new tools and approaches, including those made possible by AI.

> **Finding ways to improve strategic cohesion—e.g., broadening our view of professional learning so more of the member's current experience is captured and recognized. Looking for new or evolving unique competitive advantages and how to leverage those to differentiate better in the market.**
>
> Survey respondent on what's shaping their 2026 strategy

Reach: Connecting with the Right Learners

For learning businesses, reach is about connecting with the *right* learners—those who will benefit and who, in turn, strengthen their field or profession. The survey data show that associations face significant internal and external barriers to growing participation, and they are making investments intended to deepen engagement, strengthen connections, and position their offerings for greater visibility in a competitive landscape.

Barriers to Participation: Capacity, Competition, and the Cost of Connection

Associations report a mix of structural and market-based challenges when it comes to maintaining or growing enrollments and registrations. The top challenge is **insufficient internal resources,** cited by **47.6 percent** of respondents. This echoes what we heard in interviews with association CEOs—education is strategically important, but staffing and budget levels often do not match that importance. When internal capacity is stretched, organizations can struggle to promote offerings effectively, refresh content, explore partnerships, and experiment with new formats, all of which are important for reaching the right learners.

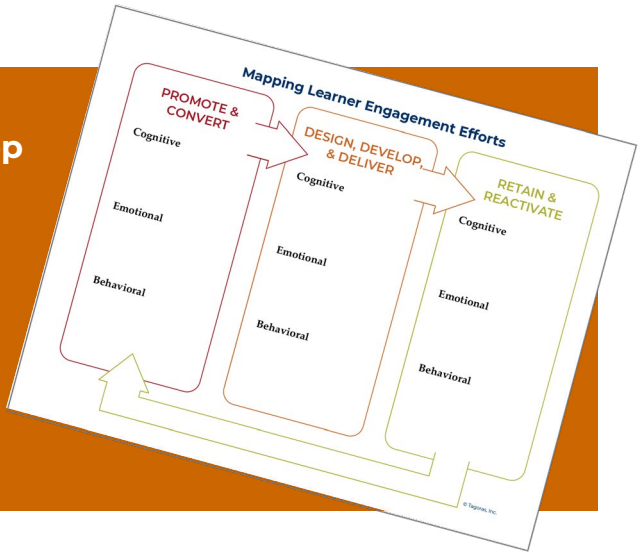
Two closely related challenges follow:

- **Pricing challenges (38.8 percent)**
- **Limited marketing resources (37.9 percent)**

Even when learner demand exists, organizations may lack the pricing acumen or promotional bandwidth to convert that demand into participation. Associations that operate with limited margins and small marketing teams may find it difficult to adapt pricing models, test offers, or sustain the kind of outreach efforts needed to compete in today's learning marketplace, where competition is intense.

Increased competition is cited as a top challenge by **37.9 percent** of respondents. Associations have to fight to be seen and heard in a sea of learning options coming from other associations, commercial training firms, employers' internal L&D teams, the open Web and artificial intelligence tools like ChatGPT.

Our **Learner Engagement Loop** is a simple tool to help you map out cognitive, emotional, and behavioral engagement tactics at three key points in your education offerings. Find it at www.tagoras.com/learner-engagement.



On the learner side, **lack of learner engagement** is a substantial challenge for **31.1 percent** of respondents. This points to the reality of attention scarcity and the need for more interactive, relevant, and personalized learning experiences.

The last challenges highlight issues related to perceived value and strategic cohesion:

- **Difficulty proving return on investment (ROI) to learners or employers (20.4 percent)**
- **Lack of strategic clarity (17.5 percent)**
- **Content that has become outdated or declined in relevance (16.5 percent)**

Reach is not purely a matter of outreach or enrollment tactics. It is equally about meaningful differentiation and clear articulation of value. In a crowded landscape, the ability to demonstrate how offerings advance learners' goals or professional outcomes is increasingly important.

Where Associations Are Investing to Strengthen Reach

If the challenges highlight what holds reach back, where associations plan to invest suggests where they see the most potential for improving reach in the year ahead.

We asked survey respondents to select up to three areas where their association will actively invest in 2026. The top investment priority is **increasing learner engagement,** selected by **44.4 percent** of respondents. This meshes with the earlier data that shows lack of learner engagement is a top challenge and may suggest that associations are prioritizing deeper, ongoing participation from learners over shallower relationships with learners who participate in education sporadically.

Several other investment areas were chosen by approximately a third of respondents, each fundamentally an approach that can expand reach:

- **Expanding microcredentials, digital badges, and/or other alternative credentials (36.4 percent)**
- **Increasing efforts to partner with other organizations (35.4 percent)**
- **Enhancing marketing and outreach efforts (32.3 percent)**
- **Providing personalized learning experiences (31.3 percent)**

These choices suggest that organizations are looking to broaden reach through diversification (new credential types), connection (partnerships), visibility (marketing), and relevance (personalization).

Notable—and potentially concerning—is the significant drop in the focus on marketing investment. In the last round of this survey, conducted a year earlier, in the fall of 2024, "enhancing marketing and outreach efforts" was the top area of investment, selected by 60.7 percent of respondents (compared to just 47.5 percent of respondents selecting "increasing learner engagement," the second highest response in 2024).

Possibly the drop is because organizations did, in fact, invest actively in marketing of their educational offerings in 2025. We have not seen much

evidence that is true, however, and anecdotally we continue to hear of a pervasive disconnect between marketing and education in organizations. "Marketing" (meaning purely "promotion") is still too often something thought about only after a product has been developed—and even that promotion is often not executed in a targeted, segmented fashion. In general, we feel that marketing should be a higher priority and more active area of investment for most learning businesses.

Here are the remaining areas of investment presented to survey respondents:

- **Implementing AI (25.3 percent)**
- **Measuring learning outcomes more effectively (21.2 percent)**
- **Increasing efforts to sell to corporate and/or other organizational purchasers (19.2 percent)**
- **Improving capabilities in data analytics (16.2 percent)**
- **Developing employer-aligned offerings (15.2 percent)**

Several of these—particularly developing employer-aligned offerings and selling to corporate purchasers—represent opportunities to reach entirely new learner segments or deepen reach with existing ones. Yet these investments—which may require new staffing or investment in sales, business development, or business intelligence training for current staff—are less common than those focused on engagement and credentials, suggesting that organizations may be slower to adapt their learning businesses for organizational buyers, even though those buyers can provide scale and predictable participation.

Product and Pricing Approaches: Incremental Movement, Not Transformation

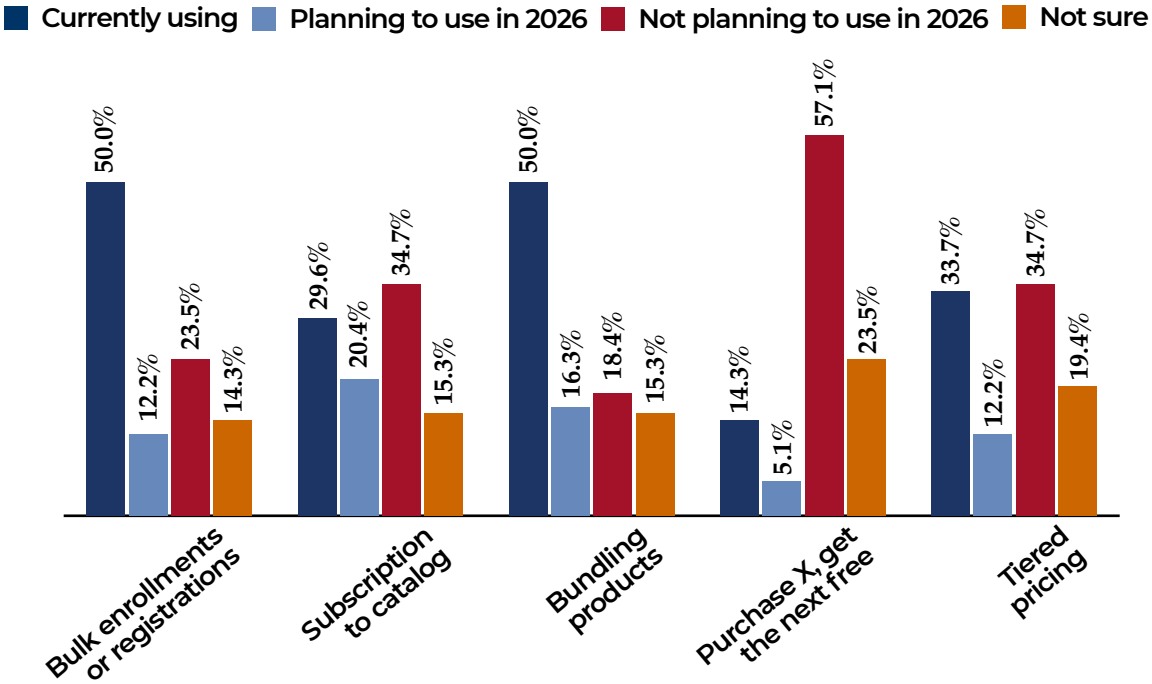
Product and pricing structures can play a powerful role in extending reach, especially through corporate buyers and group enrollments. The data show moderate adoption and limited planned expansion in 2026.

> **We took six courses and made it a bundle—six for the price of five. We made sure all the courses were essential for license renewal so our users would be interested in the full bundle.**
>
> Survey respondent on what's worked well in 2025

Half of respondents currently make use of **discounts for bulk enrollments or registrations,** which might be used to incentivize corporate buyers. **Half** also **bundle products together for a discount**. Approximately a third **(33.7 percent)** use **tiered pricing levels** (think gold, silver, and bronze), and **29.6 percent** offer **subscriptions.**

While most respondents have adopted at least one modernized pricing structure, there's room for broader adoption of pricing approaches that can open doors to broader populations of learners, particularly via employer purchases, and deepen engagement with individual learners by encouraging ongoing, continual development through a subscription. For associations looking to expand reach without dramatically increasing marketing spend, product and pricing experimentation remains an underused lever.

Please indicate your status with respect to each of the following product and pricing approaches. (98 responses)



The Reach Outlook for 2026

Taken together, the data across challenges, investment priorities, and product and pricing strategies suggests the following:

- Reach is constrained primarily by internal capacity.
  Resource limitations, pricing challenges, and minimal marketing bandwidth are the most frequently cited barriers. These point to execution constraints holding associations back as much as or more than market demand or competitive issues.
- Engagement—and by extension, relevance—is the primary area of strategic investment.
  Associations are prioritizing the learner experience, credentialing innovation, partnerships, and personalization as ways to deepen and expand reach.
- Structural levers for reach, such as pricing models and corporate pathways, remain underdeveloped.
  While most organizations currently use at least one modernized pricing approach, fewer plan to adopt additional ones in the coming year.

For associations aiming to strengthen reach in 2026, these findings suggest that the biggest gains may come from a dual focus on improving the quality of learner engagement while simultaneously experimenting with product and pricing approaches that make learning more accessible to individuals and scalable through organizational buyers.



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LEADING LEARNING PODCAST

Revenue: Fueling the Learning Business

Many associations expect their education offerings to generate positive net revenue, yet they face persistent barriers, including limited marketing and sales capacity, growing competition, and internal resource constraints. This section examines the financial profile, expectations, confidence, and challenges shaping the revenue outlook for association learning businesses in the coming year.

The Financial Profile: Most Associations Operate on the Smaller End of the Revenue Spectrum

Education revenue varies widely across associations, but the data show a strong concentration at the lower end of the scale. The largest grouping of respondents (40.0 percent) report **annual education revenue** of l**ess than $500,000, 16.8 percent** fall **between $500,000 and $1 million,** and **21.1 percent** bring in **between $1 million and $2.5 million.**

What is your approximate annual revenue (in U.S. dollars) from sales of your education offerings? (95 responses)

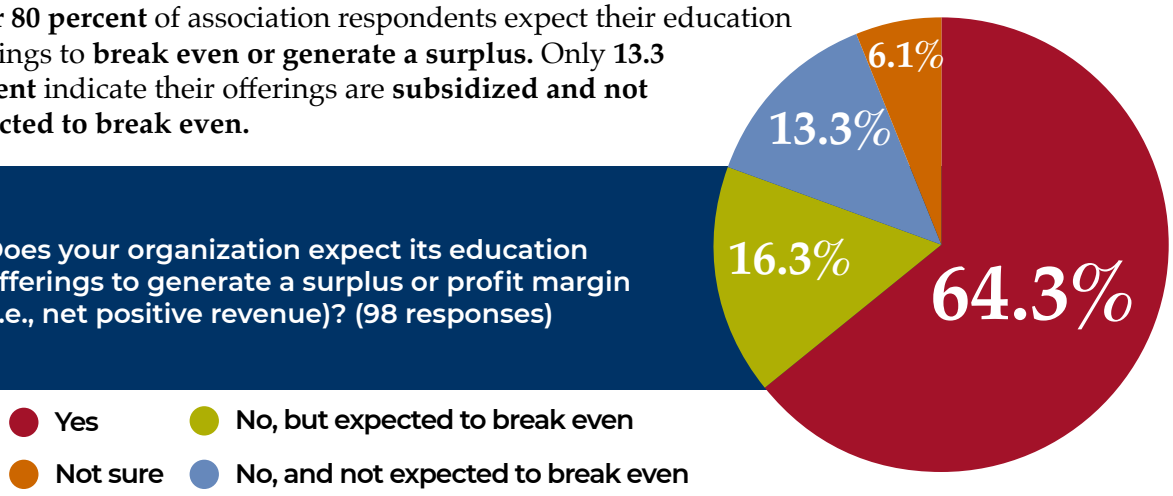
Less than $500,000	40.0%
$500,001 to $1 million	16.8%
$1,000,001 to $2.5 million	21.1%
$2,500,001 to $5 million	10.5%
$5,000,001 to $10 million	6.3%
$10,000,001 to $25 million	3.2%
$25,000,001 to $50 million	2.1%
More than $50 million	0.0%

This distribution underscores a defining characteristic of association learning businesses. Many operate with a modest revenue base, which in turn shapes their ability to invest in marketing, technology, staffing, and product innovation. The typical association, based on responses, has a **median of four paid staff focused specifically on the learning business** and an **average of 6.1**—lean teams relative to the breadth of offerings they often support.

Revenue Expectations: Education Is Expected to Contribute Positively

Over 80 percent of association respondents expect their education offerings to **break even or generate a surplus.** Only **13.3 percent** indicate their offerings are **subsidized and not expected to break even.**

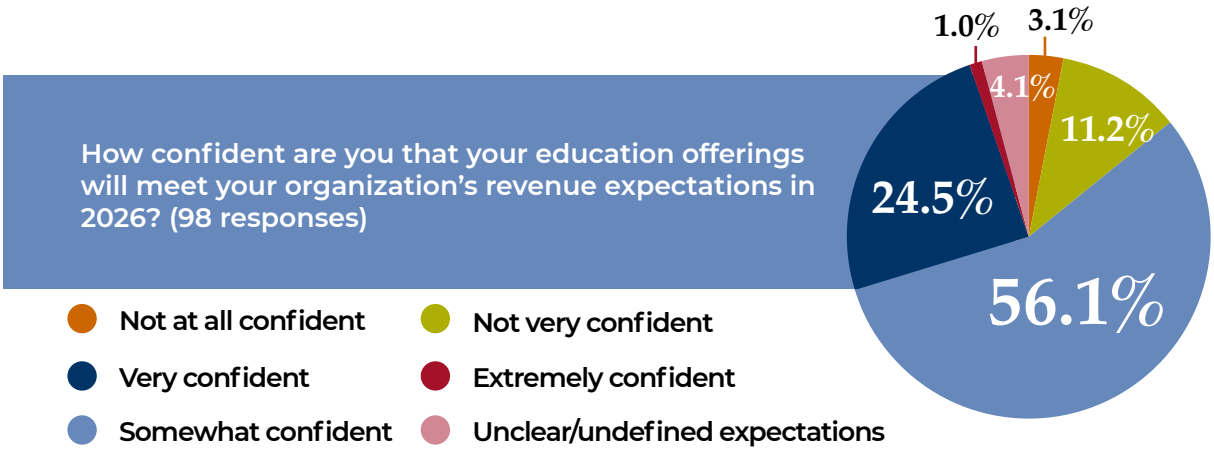
Does your organization expect its education offerings to generate a surplus or profit margin (i.e., net positive revenue)? (98 responses)



Education is not only mission-critical but also a financial engine for many associations. For nearly two-thirds of respondents, learning offerings are expected to generate revenue that supports broader organizational goals, reinforcing why revenue growth and financial sustainability appeared as top strategic priorities, as discussed earlier.

Confidence in Revenue Performance: Cautious but Generally Positive

The majority **(56.1 percent)** of associations are **somewhat confident** about their ability to meet revenue expectations in 2026—almost 15 points lower than the 70.6 percent somewhat confident in achieving their top strategic goals.



The somewhat good news is that the group **very confident** in meeting revenue expectations jumps from 24.5 percent to 31.7 percent if we look at respondents whose organizations expect a surplus to be generated by education offerings. But, as mentioned when looking at confidence around strategic goals, if only a third are very confident in doing what's expected of them, that suggests a sizeable confidence gap, especially when a meaningful minority indicate concern. Some **11.2 percent** of respondents say they are **not very confident, 3.1 percent** are **not at all confident,** and **4.1 percent** say their **revenue expectations are unclear or not defined.**

Barriers to Revenue Growth: Marketing, Competition, and Internal Constraints

Associations face significant obstacles that constrain revenue growth. The top barrier by far is **inadequate marketing and/or sales capacity**, cited by **52.6 percent** of respondents. This finding reinforces earlier results showing limited marketing resources as a major challenge to growing enrollments. Without dedicated capacity to promote offerings, convert interest, and nurture relationships, even high-quality education programs will struggle to achieve their revenue potential.

Other major barriers include the following:

- **Market saturation or increased competition (41.2 percent)**
- **Competing internal priorities in the organization (38.1 percent)**
- **Insufficient staffing or production capacity (36.1 percent)**
- **Difficulty demonstrating ROI to learners or purchasers (27.8 percent)**

Learning businesses are competing for attention in a crowded landscape while managing limited internal bandwidth. Even when demand is strong, resource constraints can stifle growth. Additional barriers add nuance:

- **Pricing that doesn't reflect market value (17.5 percent)**
- **Lack of investment in innovation (14.4 percent)**

Some **15.5 percent** of respondents indicate **a top barrier other than the eight named options,** and several of those cite uncertain market conditions and government funding cuts as major barriers.

Revenue growth in 2026 will depend as much on internal capacity and organizational alignment as on external market factors.

The Revenue Outlook for 2026

The revenue data reveals several interconnected themes:

- Education remains a critical revenue stream, with most associations expecting positive net revenue.
- Confidence in generating revenue is not as strong as it would ideally be. Resource constraints and market pressures create uncertainty.
- There are significant internal barriers to revenue, especially marketing, sales, and staffing capacity.
- Competition is intensifying, increasing the need for differentiation, clearer value propositions, and stronger outreach strategies.
- Lean teams are doing heavy lifting, which limits the capacity for experimentation, innovation, and portfolio expansion.

Associations know revenue growth is essential, but many will need clearer expectations, stronger marketing and sales infrastructure, and better alignment of resources to achieve that growth.



"Where Mission and Margin Meet" explores how association CEOs think about the role of education in driving revenue and in fulfilling purpose.

Impact: Aligning for Value

While reach and revenue set the conditions for a healthy learning business, impact is where learning providers demonstrate that their offerings create meaningful outcomes for learners and for the field or profession they serve. The survey data suggests that most learning businesses believe they are directionally aligned with their organization's authority assets while still seeing substantial room to strengthen how they demonstrate and communicate impact.

Credibility Capital

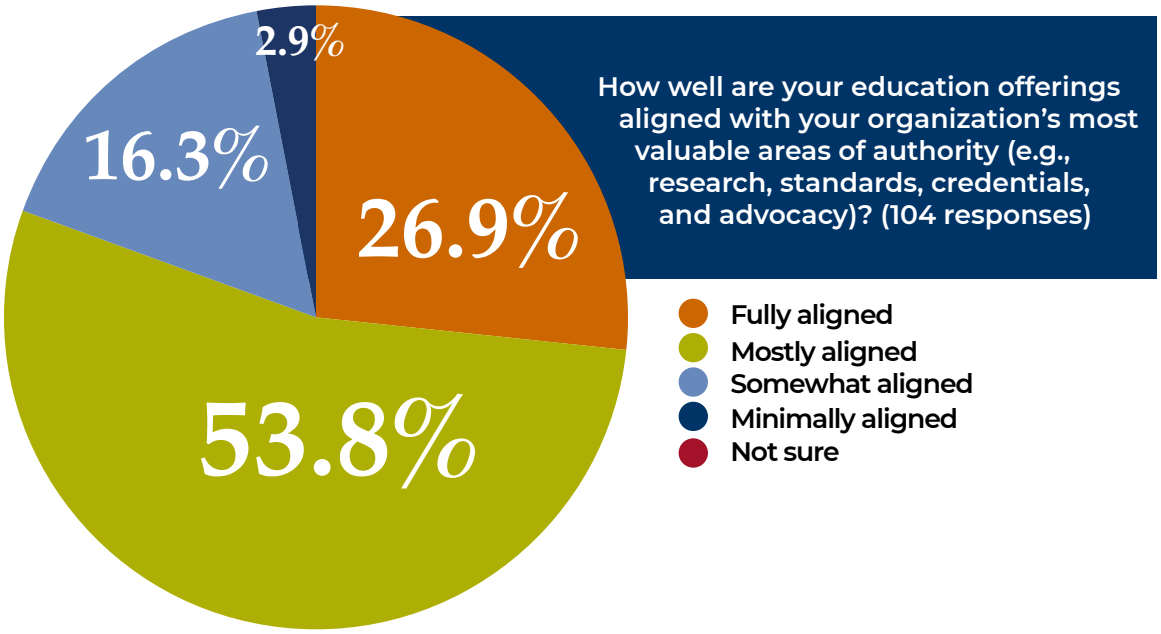
Credibility Capital™ is the interwoven set of durable, non-replicable assets that elevate an organization from "just another resource" to the trusted go-to source. We use the term Credibility Capital—which we introduce here as a way to describe this set of assets—to emphasize both their accumulated, collective value and their strategic importance for learning businesses. For associations, Credibility Capital often includes assets such as standards and guidelines, credentials and accreditations, specialized research and market data, and the power to convene and advocate—assets that increase decision confidence for employers and learners by reducing uncertainty about quality, rigor, and relevance. These assets are difficult for competitors to replicate or substitute, and they underpin both the organization's mission and its ability to sustain pricing power and market relevance.

Protecting and reinforcing these assets (preventing what one CEO described to us as "strategic asset leak") is a critical challenge for associations in maintaining their authority. Learning businesses that intentionally align their offerings with high-value elements of their association's Credibility Capital are better positioned to deliver employer-trusted outcomes, differentiate from commoditized content providers, command stronger pricing, and foster meaningful engagement. In an environment of eroding trust and proliferating alternatives, Credibility Capital is the strategic basis on which an association learning business can make internal decisions about investments of time and money and give employers and learners confidence in choosing its offerings.

Portfolio-Authority Alignment

Most respondents think their learning portfolio aligns well with their organization's areas of authority (i.e., the Credibility Capital just discussed), with **26.9 percent** saying their offerings are **fully aligned** and **53.8 percent** saying they are **mostly aligned.**

Many association learning businesses are building on credible sources of expertise—standards, research, credentials, or other core assets. Still, the fact that under a third report being fully aligned suggests there is opportunity for more discipline. As we've seen earlier in this report, many association learning businesses operate leanly, feel a keen lack of resources, and are experiencing growing competition. In such an environment, focusing on doing less but doing it better may be the difficult row that needs to be hoed.



Where Association Learning Businesses See Missed Opportunities

Although portfolio-authority alignment is generally strong, respondents identify clear areas where they underuse their Credibility Capital to differentiate.

Which of the following organizational strengths do you believe your education offerings could better leverage? Select all that apply. (103 responses)

Research and publications	43.7%
Credentialing or certification programs	46.6%
Industry standards or best practices	51.5%
Policy or advocacy initiatives	26.2%
Member or stakeholder expertise	56.3%
Strategic partnerships	53.4%
None (We are already leveraging key strengths effectively.)	1.0%
Other	1.0%

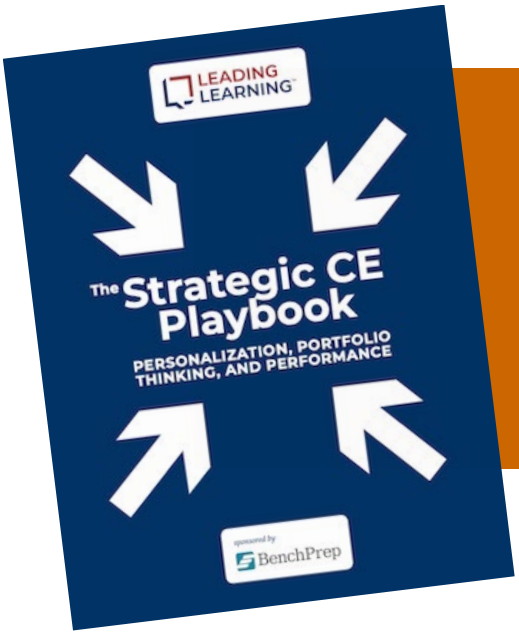
Only a single respondent indicates that their organization is already leveraging key strengths effectively. This says that, while many organizations possess Credibility Capital, most do not yet fully leverage it when designing and delivering education offerings.

A majority of respondents think that the following organizational strengths could be better leveraged in their education offerings:

- **Member or stakeholder expertise (56.3 percent)**
- **Strategic partnerships (53.4 percent)**
- **Industry standards or best practices (51.5 percent)**

Credentialing or certification programs (46.6 percent) and **research and publications (43.7 percent)** are also seen as areas to better leverage.

These assets and strengths already exist in the association, meaning they represent opportunities that can be acted on relatively quickly and cost-effectively to help the learning business better differentiate and deepen trust.



Focusing on three essential levers, "The Strategic CE Playbook: Personalization, Portfolio Thinking, and Performance" introduces a practical framework to help design and deliver programs that will succeed in today's competitive market.

Measures of Success: Showing Impact

Associations rely on a mix of enrollment metrics, satisfaction measures, and learner outcome indicators to assess success and impact.

The most widely used measures include the following:

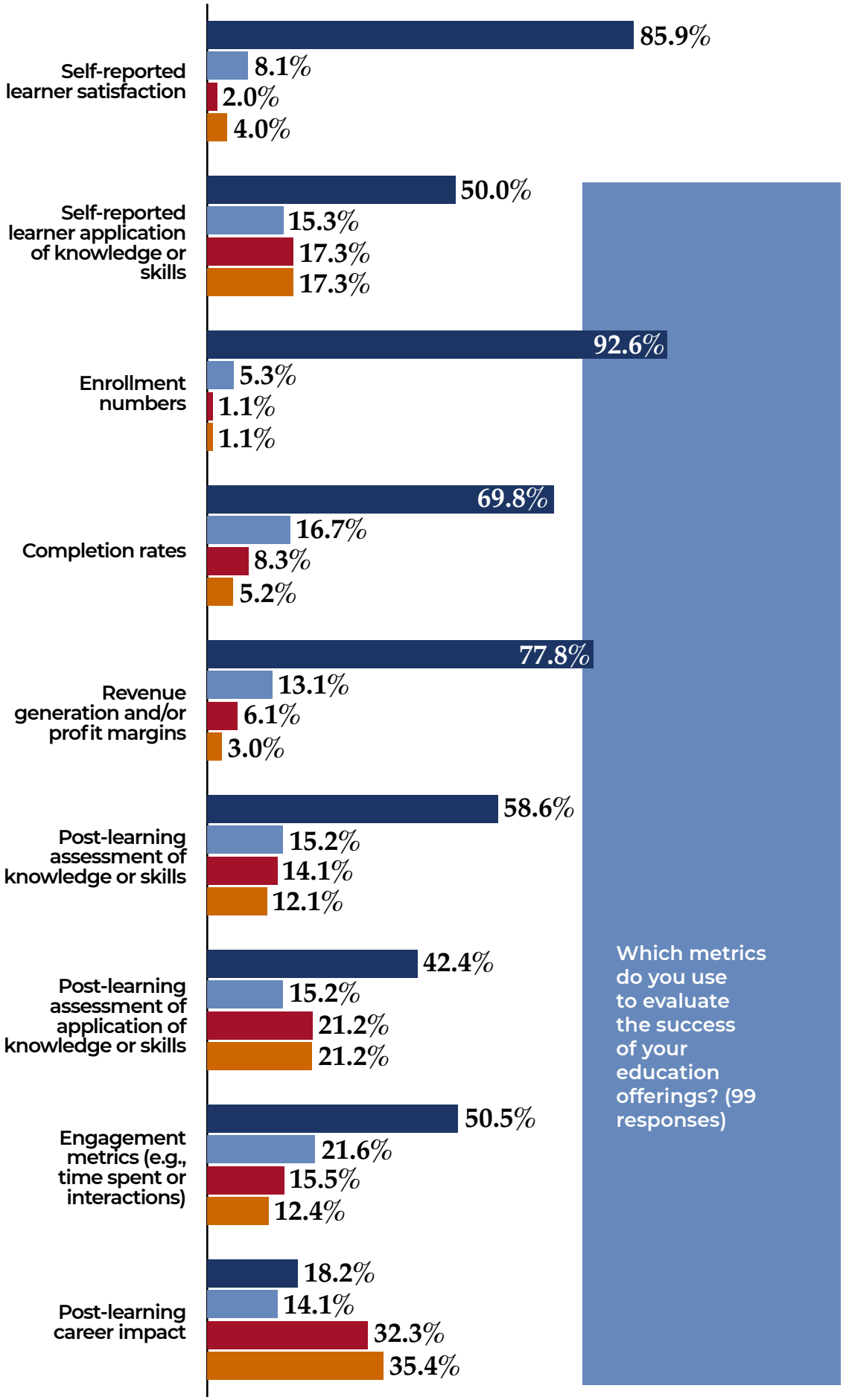
- **Enrollment numbers (currently used by 92.6 percent)**
- **Self-reported learner satisfaction (85.9 percent)**
- **Revenue generation and/or profit margin contribution (77.8 percent)**
- **Completion rates (69.8 percent)**

More outcome-oriented measures are used less frequently:

- **Post-learning assessment of knowledge or skills (58.6 percent)**
- **Engagement metrics, like time spent (50.5 percent)**
- **Self-reported learner application of knowledge or skills (50.0 percent)**
- **Post-learning assessment of application of knowledge or skills (42.4 percent)**

Post-learning career impact is currently a measure used by only **18.2 percent** of respondents—an interestingly low number given the focus on workforce alignment cited earlier.

While most associations track participation and satisfaction well, fewer consistently track evidence of learning or behavior change. We believe the associations that do measure performance outcomes and application are laying the groundwork for stronger competitive positioning as employers and learners increasingly seek demonstrable results.

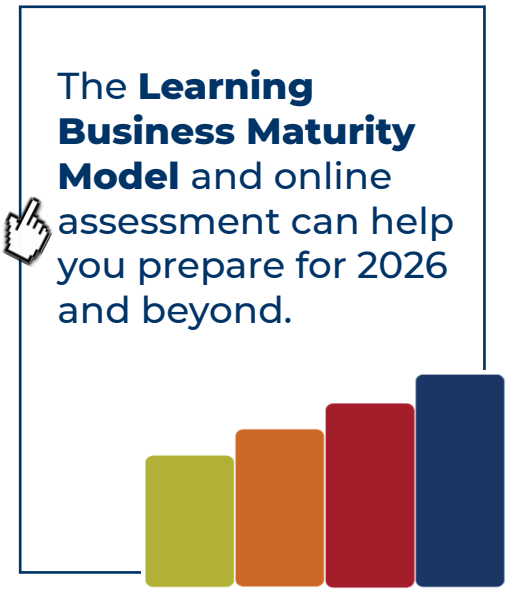

Self-reported learner satisfaction
85.9%
8.1%
2.0%
4.0%
Self-reported learner application of knowledge or skills
50.0%
15.3%
17.3%
17.3%
Enrollment numbers
92.6%
5.3%
1.1%
1.1%
Completion rates
69.8%
16.7%
8.3%
5.2%
Revenue generation and/or profit margins
77.8%
13.1%
6.1%
3.0%
Post-learning assessment of knowledge or skills
58.6%
15.2%
14.1%
12.1%
Post-learning assessment of application of knowledge or skills
42.4%
15.2%
21.2%
21.2%
Engagement metrics (e.g., time spent or interactions)
50.5%
21.6%
15.5%
12.4%
Post-learning career impact
18.2%
14.1%
32.3%
35.4%
Which metrics do you use to evaluate the success of your education offerings? (99 responses)

The Impact Outlook for 2026

The data highlights two points:

- Alignment is an imperative—but not perceived as one.
  Most associations believe their offerings draw on core authority assets, but many still see overlooked opportunities. Strengthening the translation of credibility and authority into programs remains a significant lever for differentiation and impact.
- Outcome measurement is uneven.
  While participation and satisfaction metrics are ubiquitous, deeper evidence of skill development, behavior change, and career impact is less common. As workforce alignment pressures grow, association learning businesses with credible outcome data will stand out.

In the final section of the report, we look ahead for ways to improve impact along with reach and revenue. ▸



Looking Ahead: Insights to Guide Learning Businesses

Across the full set of findings—beginning with strategic goals and drivers, continuing through their reach and revenue realities, and culminating in how they understand and demonstrate impact—we see that learning businesses are operating in an environment defined by rising expectations, shifting workforce needs, constrained internal capacity, and expanding possibilities for how learning can be designed and delivered.

With the data in mind, and our own understanding of the sector, we return to the three strategic takeaways we set out in the beginning.

- Strategic clarity is an existential issue.
  The learning businesses represented in the data face no shortage of opportunities. Whether the goal is stronger engagement, deeper workforce alignment, or more sustainable revenue, associations are working to deliver learning that matters. The data makes visible the importance of strategic clarity in this landscape—articulating what deserves attention, why it matters, and how it connects to mission and market realities. Strategy is not a planning exercise; it is what steadies decision-making as conditions shift, and it must be seen clearly by all.
- Capacity is the primary constraint.
  Again and again, the findings point to a truth many leaders already know instinctively—progress is most severely limited by internal capacity not external demand. Limited staffing, insufficient marketing and sales capacity, lack of specialized expertise, and competing priorities all influence reach, revenue, and impact. These constraints aren't insurmountable, but they require intentional responses—whether through investment, partnerships, smarter workflows, or technology that amplifies human capability. Capacity is the lever that determines whether strategic intentions translate into real outcomes.
- Credibility drives differentiation.
  Many associations hold something powerful and increasingly rare in the crowded learning marketplace: credibility rooted in expertise, standards, research, credentialing, and long-standing service to their fields. But the survey shows that even organizations that recognize this strength are not fully capitalizing on it. Differentiation—and the value learners and employers perceive—flows from associations' Credibility Capital, these trusted, hard-to-replicate organizational assets. When portfolios draw intentionally on this capital, offerings resonate more deeply, outcomes carry more weight, and the association's unique value becomes clearer.

Association learning businesses hold a distinctive position at the intersection of professional development, workforce readiness, and the long-term health of their professions and industries. Ultimately, the work is about more than managing programs or portfolios. It is about helping individuals grow, supporting organizations' performance, and strengthening entire fields. Those learning businesses that lead with clarity, invest in capacity, and leverage their credibility will not only adapt to the future; they will help shape it and demonstrate, through both their ambition and action, the enduring value of learning. ▸◂

Recognizing Those Who Expanded Our Reach

We are truly grateful to the organizations that helped promote the survey on which this report is based. Their efforts broadened participation and strengthened the insights we are able to share.

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About Leading Learning

publisher of this report

Leading Learning (www.leadinglearning.com) equips learning business professionals to excel in the global market for lifelong learning, continuing education, and professional development. Through a podcast, Webinars, an e-newsletter, publications, events, and other resources, Leading Learning aims to raise awareness of the third sector of education and the critical role that learning businesses play in advancing learners, careers, industries, and society.

Leading Learning is an initiative of Tagoras (www.tagoras.com), which was co-founded by Jeff Cobb and Celisa Steele in 2007. Tagoras helps organizations fully integrate learning with member and customer value and grow the reach, revenue, and impact of their learning businesses. Steele and Cobb have worked in the business of lifelong learning since the 1990s and have advised leaders at a wide range of organizations on deploying effective strategy and improving the performance of their education and training portfolios.

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LEADING LEARNING™



Appendix: Survey Data

We are grateful to the organizations that took the time to participate in our online survey between September 2 and October 22, 2025.

We received 156 qualifying responses, and 107 of those responses came from associations. Data from the 107 association learning business responses is presented in this appendix. Note that this is a non-statistical survey.

Type of Organization

Which of the following best characterizes your organization? (107 responses)

Association with only or primarily individual members (e.g., professional society)	64.5%
Association with only or primarily organizational members (e.g., trade association)	35.5%

INDIVIDUAL MEMBERSHIP

How many active individual members does your organization currently have? (104 responses)

1,000 or less	10.6%
1,001 to 5,000	18.3%
5,001 to 10,000	12.5%
10,001 to 25,000	18.3%
25,001 to 50,000	16.3%
50,001 to 100,000	4.8%
More than 100,000	4.8%
We have only organizational members.	14.4%

ORGANIZATIONAL MEMBERSHIP

How many active organizational members does your organization currently have? (103 responses)

Less than 100	23.3%
101 to 200	4.9%
201 to 500	15.5%
501 to 1,000	5.8%
1,001 to 5,000	15.5%
More than 5,000	4.9%
We have only individual members.	30.1%

Primary Strategic Goal

Which of the following most closely aligns with your primary strategic goal for your education offerings in 2026? Select one. (107 responses)

Increasing revenue	28.0%
Enhancing learner engagement	22.4%
Growing enrollments and/or registrations	15.9%
Strengthening alignment with workforce needs	24.3%
Advancing equity, diversity, inclusion, and accessibility (DEIA)	0.0%
Improving marketing reach and effectiveness	5.6%
Increasing operational efficiency	0.9%
None of the above	1.9%
I don't know our primary strategic goal.	0.9%

Secondary Strategic Goal

Which of the following most closely aligns with your secondary strategic goal for your education offerings in 2026? Select one. (106 responses)

Increasing revenue	23.6%
Enhancing learner engagement	18.9%
Growing enrollments and/or registrations	26.4%
Strengthening alignment with workforce needs	14.2%
Advancing equity, diversity, inclusion, and accessibility (DEIA)	1.9%
Improving marketing reach and effectiveness	8.5%
Increasing operational efficiency	4.7%
None of the above	0.9%
I don't know our secondary strategic goal.	0.9%

Strategic Drivers

Which of the following do you consider the most important drivers for your top strategic goals for your education offerings? Select all that apply. (106 responses)

Need for stronger competitive positioning in our market	46.2%
Need to increase financial sustainability and/or profitability	63.2%
Need to support workforce development in our field or industry	59.4%
Better alignment with mission	15.1%
Compliance with industry standards or regulatory requirements	15.1%
Desire to be seen as setting the pace in our field or industry	57.5%
Evolving learner demands	55.7%
Internal pressures (e.g., from management, administration, board)	15.1%
Other	5.7%

Portfolio-Authority Alignment

How well are your education offerings aligned with your organization's most valuable areas of authority (e.g., research, standards, credentials, and advocacy)? (104 responses)

Fully aligned (The education offerings reflect and reinforce the organization's core areas of authority.)	26.9%
Mostly aligned (Most offerings draw from key areas of authority.)	53.8%
Somewhat aligned (The offerings are a mix of aligned and independent offerings.)	16.3%
Minimally aligned (Few offerings connect to the organization's core areas of authority.)	2.9%
Not sure	0.0%

Underleveraged Strengths

Which of the following organizational strengths do you believe your education offerings could better leverage? Select all that apply. (103 responses)

Research and publications	43.7%
Credentialing or certification programs	46.6%
Industry standards or best practices	51.5%
Policy or advocacy initiatives	26.2%
Member or stakeholder expertise	56.3%
Strategic partnerships	53.4%
None (We are already leveraging key strengths effectively.)	1.0%
Other	1.0%

Trends and Issues

How important is each of the following trends and issues to your learning business's strategy in 2026? (103 responses)

	Not important	Somewhat important	Important	Very important	Critical	Weighted average
Advances in artificial intelligence	5.8%	16.5%	30.1%	35.9%	11.7%	3.31
Workforce and employer needs (e.g., job readiness, upskilling, and reskilling)	2.0%	10.8%	24.5%	38.2%	24.5%	3.73
Learner preferences for flexibility (e.g., in formats, scheduling)	0.0%	10.8%	30.4%	41.2%	17.6%	3.66
Providing more personalized learning experiences	1.0%	16.5%	24.3%	46.6%	11.7%	3.51
Increasing competition from other learning providers	8.7%	19.4%	24.3%	31.1%	16.5%	3.27
Growth in micro-credentials, digital badges, and other forms of alternative credentialing	18.4%	24.3%	19.4%	24.3%	13.6%	2.90
Virtual and/or hybrid events	5.9%	25.5%	27.5%	26.5%	14.7%	3.19
Diversity, equity, inclusion, and accessibility (DEIA) in education offerings	13.9%	35.6%	28.7%	17.8%	4.0%	2.62

Challenges to Growing Enrollments/Registrations

What are the top challenges you face in maintaining or growing enrollments and/or registrations for your education offerings in the coming year? Select up to three. (103 responses)

Lack of strategic clarity	17.5%
Limited marketing resources	37.9%
Increased competition	37.9%
Pricing challenges	38.8%
Lack of learner engagement	31.1%
Difficulty proving return on investment (ROI) to learners or employers	20.4%
Content that has become outdated or declined in relevance	16.5%
Insufficient internal resources (e.g., staff or budget)	47.6%
Other	9.7%

Confidence in Achieving Strategic Goals

Given your learning business's current resources, how confident are you in achieving your top strategic goals for 2026? (102 responses)

Not at all confident	1.0%
Not so confident	2.9%
Somewhat confident	70.6%
Very confident	24.5%
Extremely confident	1.0%

Areas of Active Investment

Which of the following areas will your learning business most actively invest in over the next year? Select up to three. (99 responses)

Increasing learner engagement	44.4%
Measuring learning outcomes more effectively	21.2%
Developing employer-aligned offerings	15.2%
Implementing artificial intelligence (AI)	25.3%
Expanding microcredentials, digital badges, and/or other alternative credentials	36.4%
Increasing efforts to sell to corporate and/or other organizational purchasers (e.g., government)	19.2%
Increasing efforts to partner with other organizations	35.4%
Enhancing marketing and outreach efforts	32.3%
Improving capabilities in data analytics	16.2%
Providing personalized learning experiences	31.3%
Other	9.1%

Implementation of Artificial Intelligence

Where are you in implementing artificial intelligence (AI) in your education offerings? (99 responses)

Actively using AI across most or all offerings	6.1%
Actively using AI in some offerings	13.1%
Developing a plan to implement AI	6.1%
Early stages of AI implementation (e.g., pilots)	17.2%
Internal discussions but no clear implementation plan	44.4%
Not currently discussing AI	12.1%
Not sure	1.0%

USES OF AI

This question was asked only of respondents who indicated they are developing a plan to implement AI, are in the early stages of implementation, or are actively using AI in some or all of their offerings. For which activities related to your education offerings do you use or plan to use AI? (42 responses)

	Currently using AI	Planning to use AI in 2026	Not planning to use AI in 2026	Not sure
Personalizing learning experiences based on individual learner data	11.9%	23.8%	31.0%	33.3%
Automating administrative tasks (e.g., scheduling, grading, or reporting)	21.4%	45.2%	14.3%	19.0%
Enhancing learner engagement through chatbots or other AI-driven support	9.5%	38.1%	35.7%	16.7%
Developing adaptive learning pathways that adjust to learner performance	4.8%	23.8%	31.0%	40.5%
Analyzing aggregate learner data to identify trends and improve offerings	31.0%	50.0%	4.8%	14.3%
Content creation or curation (e.g., generating quizzes or summaries)	50.0%	35.7%	7.1%	7.1%
Providing predictive analytics for course enrollments and demand forecasting	7.1%	26.2%	31.0%	35.7%
Optimizing marketing campaigns (e.g., targeted promotions or personalized messaging)	22.0%	19.5%	14.6%	43.9%

Success Metrics

Which metrics do you use to evaluate the success of your education offerings? (99 responses)

	Currently using	Planning to use in 2026	Not planning to use in 2026	Not sure
Self-reported learner satisfaction	85.9%	8.1%	2.0%	4.0%
Self-reported learner application of knowledge or skills	50.0%	15.3%	17.3%	17.3%
Enrollment numbers	92.6%	5.3%	1.1%	1.1%
Completion rates	69.8%	16.7%	8.3%	5.2%
Revenue generation and/or profit margins	77.8%	13.1%	6.1%	3.0%
Post-learning assessment of knowledge or skills	58.6%	15.2%	14.1%	12.1%
Post-learning assessment of application of knowledge or skills	42.4%	15.2%	21.2%	21.2%
Engagement metrics (e.g., time spent or interactions)	50.5%	21.6%	15.5%	12.4%
Post-learning career impact	18.2%	14.1%	32.3%	35.4%

Product and Pricing Approaches

Please indicate your status with respect to each of the following product and pricing approaches. (98 responses)

	Currently using	Planning to use in 2026	Not planning to use in 2026	Not sure
Discounts for bulk enrollments or registrations (e.g., by corporate buyers)	50.0%	12.2%	23.5%	14.3%
Subscription access to partial or full education catalog	29.6%	20.4%	34.7%	15.3%
Bundling products together for a discounted total cost	50.0%	16.3%	18.4%	15.3%
Purchase X number of enrollments or registrations, get the next free	14.3%	5.1%	57.1%	23.5%
Tiered pricing levels (e.g., premium, standard, and basic)	33.7%	12.2%	34.7%	19.4%

Learning Business Staff

Approximately how many paid staff does your learning business currently have? Remember, if your learning business is part of a larger organization, we're asking here about staff focused specifically on the learning business—i.e., on creating and selling continuing education, professional development, and other types of lifelong learning experiences. (97 responses)

Mean	6.1
Median	4.0

Annual Revenue from Education Offerings

What is your approximate annual revenue (in U.S. dollars) from sales of your education offerings? (95 responses)

Less than $500,000	40.0%
$500,001 to $1 million	16.8%
$1,000,001 to $2.5 million	21.1%
$2,500,001 to $5 million	10.5%
$5,000,001 to $10 million	6.3%
$10,000,001 to $25 million	3.2%
$25,000,001 to $50 million	2.1%
More than $50 million	0.0%

Revenue Expectations

Does your organization expect its education offerings to generate a surplus or profit margin (i.e., net positive revenue)? (98 responses)

Yes, a surplus/net positive revenue is expected.	64.3%
No, but education offerings are expected to break even.	16.3%
No, education offerings are subsidized and not expected to break even.	13.3%
Not sure	6.1%

Confidence in Meeting Revenue Expectations

How confident are you that your education offerings will meet your organization's revenue expectations in 2026? (98 responses)

Not at all confident	3.1%
Not very confident	11.2%
Somewhat confident	56.1%
Very confident	24.5%
Extremely confident	1.0%
Our revenue expectations are unclear or not defined.	4.1%

Revenue Barriers

What are the biggest barriers preventing your education offerings from achieving their full revenue potential? Select up to three.(97 responses).

Inadequate marketing and/or sales capacity	52.6%
Pricing that doesn't reflect market value	17.5%
Difficulty demonstrating ROI to learners or purchasers	27.8%
Insufficient staffing or production capacity	36.1%
Lack of investment in innovation	14.4%
Competing priorities in your organization	38.1%
Market saturation or increased competition	41.2%
Regulatory or compliance constraints	1.0%
Other	15.5%