



Time to Decide

2014 PULSE REPORT

Greenfield
Services Inc.

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Table of Contents

Executive Summary.....	3
Introduction	5
Methodology and Limitations	6
Association Goals and Objectives	6
Growth, Visibility and Member Participation	6
The Resources to Do the Job	7
Association Challenges: Dialing Down the Stress	8
Member Relationships	11
A Return to Traditional Membership Models	11
Discovering Where Members Engage	12
Reaching Farther	14
Dues Revenue on the Rise	15
Priorities for Member Relations: Transaction Trumps ROI	16
Reaching and Engaging Younger Members	18
Challenges Meeting Membership Goals	19
The Membership Life Cycle	19
New Member Outreach	19
Why Members Join	20
Welcoming New Arrivals	20
A Surge in Overall Member Retention?	21
Maintaining Contact with Members	22
The End of the Road	24
Stalling Out on Social Media	25
What Keeps Association Executives Up at Night	25
Audience Profile	28
Conclusion: The Way Forward	29
About Greenfield Services Inc	31
Acknowledgements	31

Executive Summary

After years of resilience and creativity in the face of declining resources, shifting demographics, and changes in member expectations, the *2014 Pulse Report* suggests that many Canadian-based associations have gone into a holding pattern in response to the transformative shifts in their immediate future.

The *2014 Pulse Report*, Greenfield Services Inc.'s third annual review of Canada's association sector, finds that relatively few organizations are pro-actively addressing the key strategic and operational issues that will determine their future strength.

Greenfield's survey of 178 association managers, leaders, and executives across the country determined that:

- Many Canadian-based associations, large and small, are still struggling to meet member expectations in spite of limited resources. It seems likely that many organizations lack the membership depth and resources to improve programming, and therefore lack the critical mass to pay for the services they might like to deliver.
- Membership growth, higher visibility in the association's industry or field, and increased member participation remained consistent as top three priorities in 2013 and 2014.
- The 2014 survey data indicated that membership dues were beginning to increase, after a couple of years of relative stagnation.
- Non-dues revenue, insufficient staffing, and lack of funding to support association initiatives were the most serious concerns among *Pulse Report* respondents. The overall level of anxiety over these challenges may have abated somewhat between 2013 and 2014.
- Event attendance has grown steadily as an association priority over the three years of *Pulse Report* research.
- Alarming, no more than 56% of associations have marketing plans in place to reach potential new members and offset steady attrition of existing members.
- Moreover, across three years of data, associations are consistently devoting less attention to renewing members they've already identified and acquired. *Pulse Report* respondents have shown more interest in member retention than in the day in, day out effort to build member value and ROI.
- Association executives are well aware of the emerging need for member-driven management and customized service. Almost half expressed strong concern about their organizations' inability to properly track or measure member engagement.

- Associations are scrambling to recruit and serve new generations of members, and to find the areas of interest where they can engage more effectively. So far, the *Pulse Report* data indicate that relatively few associations have found the right mix of programs and services to satisfy large numbers of their existing members.
- Yet associations were considerably less likely in 2014 than they were in 2013 to be considering new membership models that might help them attract a wider mix of members.
- Associations' embrace of social media has polarized over the last year, with a small proportion becoming more active on online networks and the rest stalling in their embrace of new technologies and platforms. The proportion of survey respondents with active social media programs actually declined between 2013 and 2014, from 88% to 82.8%, and only a small proportion of organizations dedicated steady, significant staff resources to new media programs.
- For the third consecutive year, *Pulse Report* participants identified traditional, outbound functions like public awareness, event promotion to members, and member news dissemination as their organizations' top uses of social media. Their survey responses suggested their organizations are still making only limited use of social media tools that could help them transform their programs and deepen their member relationships.
- Association executives identified a handful of specific issues that kept them up at night, including demographic or generational shifts, declining member interest, member relevance and value, affiliate chapter relations, funding and revenue, volunteer engagement, and limited member growth and retention.

Introduction

The *2014 Pulse Report* suggests that many Canadian-based associations have gone into a holding pattern in their efforts to innovate, evolve, and embrace the technological and generational shifts in their immediate future.

The warning signs of dramatic, transformative change have not diminished in the last year. In fact, among proponents of a more transparent, member-centric, tech-savvy approach to member relationships, there is very little doubt that change is a positive to be embraced. But with three years of *Pulse Report* data in hand, it's becoming clear that any momentum to modernize and diversify Canadian-based associations' operations and strategies has largely dissipated. The responses from 178 association managers, executives, and leaders across Canada indicate that:

- For the second year, many associations are struggling to meet member expectations. This may point to a particularly vicious circle for organizations that lack the membership depth and resources to improve programming, and therefore lack the critical mass to pay for the services they would like to deliver.
- Across three years of data, associations are steadily devoting less attention to renewing members they've already identified and acquired—even though overall membership growth remains a top priority, and is only achieved by retaining existing members as well as attracting new ones.
- It seems ever more evident that associations based in Canada are scrambling to recruit and serve new generations of members, and to find the areas of interest where they can engage more effectively. So far, the *Pulse Report* data indicate that relatively few associations have found the right mix of programs and services to satisfy large numbers of their existing members.
- Yet associations were considerably less likely in 2014 than they were in 2013 to be considering new membership models that might help them attract a wider mix of members.
- Associations' embrace of social media has polarized over the last year, with a small proportion becoming more active on online networks and the rest stalling out in their embrace of new technologies and platforms. For the second year, not a single *Pulse Report* respondent answered questions about which online analytics tools they used, or how the results helped shape their social media strategies.

In years past, it made sense to weigh the pace of innovation among Canadian-based associations against the flurry of recent challenges buffeting the sector—an uncertain economy, new technologies and business models, and rapid shifts in member demographics, often against a brutal backdrop of limited resources and skeleton staffing. But with many *Pulse Report* respondents expressing diminished concern about basic organizational survival issues like funding, staffing, and revenue generation, associations may now be in a pivotal moment where they can free up sufficient resources to explore new models and, crucially, have time and breathing room to think creatively and strategically. If such a moment has arrived, it is crucial that associations grasp it.

In the introduction to last year's *Pulse Report*, we commented that “we should all be concerned—as managers, citizens, and taxpayers—if the health and performance of associations in Canada is in jeopardy. But the first step in solving a large, challenging problem is to name it and understand its scope.” In 2014, a clear and worrying disconnect is opening up between the pace at which associations are embracing new tools and techniques and

the scope of change on the near horizon. If the *2014 Pulse Report* helps draw attention to this risk, it will have served its highest imaginable purpose.

Methodology and Limitations

Greenfield Services conducted the research for its third *Pulse Report* from April through mid-June, 2014. The process consisted of an online survey completed by representatives of 178 Canadian-based associations, five more than in 2013. We reached out to approximately 1,500 organizations; through Greenfield's own association client list, our partnership with Advanced Solutions International, extensive exposure on social media (including Twitter, and posts in LinkedIn Groups) to obtain 178 responses between March 2014 and June 2014.

While the survey did not reach a large enough audience to make the results statistically significant, in the way a national poll would be, the responses uncovered many of the most pressing concerns facing the Canadian association community and traced the steps many organizations are taking to renew and update their operations.

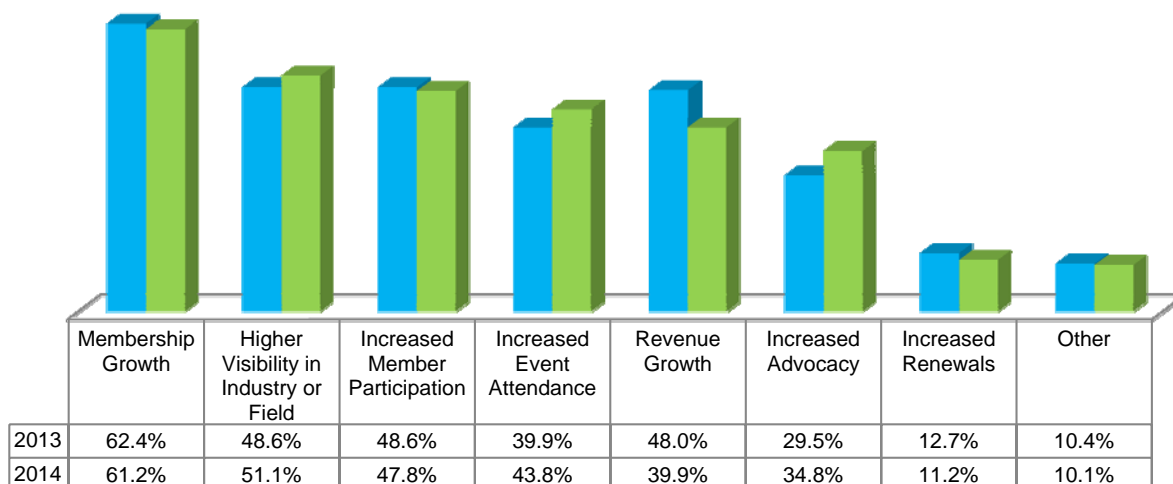
Association Goals and Objectives

Growth, Visibility and Member Participation

The *2014 Pulse Report* determined that:

- Membership growth, higher visibility in the association's industry or field, and increased member participation remained consistent as respondents' top three functional priorities in 2013 and 2014.
- Compared to 2013, the 2014 respondents attached somewhat more importance to advocacy, event attendance, and higher visibility in the field, and somewhat less to revenue growth. Event attendance has grown steadily as an association priority over the three years of *Pulse Report* research, from 36.7% in 2012, to 39.9% in 2013, to 43.8% in 2014.
- The 'Other' category revealed the deeper texture of individual associations' criteria for success, including member participation and satisfaction, membership or industry growth, effective service delivery and public protection, interest in certification, effective service delivery or business plan execution, and policy influence. One respondent parodied the tactical approach that holds some organizations back from more sustained success, claiming that his or her association measured performance based on ***"feelings. You know, if we FEEL that we're successful then that's good enough, right? RIGHT?"***

Key Success Factors for Canadian-Based Associations, 2013-2014



Finally, for the third year in a row, the 2014 *Pulse Report* identified a key disconnect between associations' objectives

The Disconnect: Association Membership Objectives, 2012–2014

	2012	2013	2014
Membership Growth	63.9%	62.4%	61.2%
Increased Renewals	12.2%	12.7%	11.2%

and their strategies for achieving them. While membership growth consistently scores above 60% as a key success factor for respondents' organizations, the proportion that prioritized efforts to renew existing members actually declined marginally from 2012 and 2013 to 2014. As we reported in 2013, "this reinforces a picture of organizations that are scrambling to acquire new market, without devoting the time and resources that would help them build a satisfied, sustainable membership base."

The Resources to Do the Job

Consistent with the 2012 and 2013 surveys, *Pulse Report* respondents could be divided into four roughly even categories based on the number of members their organizations represented: 23% had fewer than 250 members, 20.4% between 250 and 750, 27.6% between 750 and 2,000, and 29% more than 2,000. Compared to the previous surveys, 2014 participants continued a gradual skew toward larger associations with more members.

Associations by Membership Size, 2012–2014

	2012	2013	2014
>250	27.3%	21.1%	23%
250-750	23.5%	25.9%	20.4%
750-2,000	19.8%	22.5%	27.6%
>2,000	29.4%	30.6%	29%

For the second year, the *Pulse Report* results showed that larger associations are struggling to meet member expectations with limited resources. In 2013 and again in 2014, the majority of organizations with 2,000 or more members had budgets of \$5 million or less. Moreover, nearly one-third of organizations with 2,000 or more members and more than three-quarters of organizations with 751 to 2,000 members had 10 or fewer staff.

	% of Sample	Up to \$1M	\$1-4.9M	\$5-9.9M	Over \$10M
	152	63	64	13	12
<250	23.0%	68.6%	25.7%	2.9%	2.9%
250-750	20.4%	58.1%	32.3%	6.5%	3.2%
751-2000	27.6%	40.5%	54.8%	2.4%	2.4%
>2000	28.9%	9.1%	50.0%	20.5%	20.5%

	Fewer Than 5 staff	6-10	11-25	More than 25
	56	42	36	18
<250	60.0%	25.7%	8.6%	5.7%
250-750	41.9%	29.0%	22.6%	6.5%
751-2000	47.6%	28.6%	16.7%	7.1%
>2000	4.5%	27.3%	43.2%	25.0%

At the other end of the size spectrum, more than 90% of organizations with 250 or fewer members had budgets of \$1 million or less, and 60% were operating with five or fewer staff, a slight improvement from the 67.7% that reported similar staffing levels in 2013.

Association Challenges: Dialing Down the Stress

Consistent with the 2012 and 2013 *Pulse Reports*, 2014 respondents identified non-dues revenue, insufficient staffing, and lack of funding to support association initiatives as their three most serious concerns.

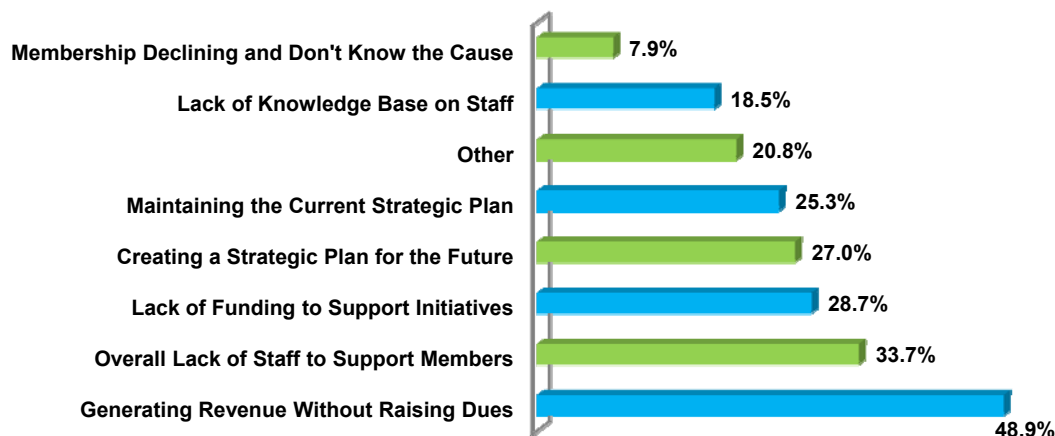
For the second year, just over half of the 2014 respondents (52.3%, compared to 51.5% in 2013) expressed concern about their ability to create or maintain a strategic plan for their organizations. 18.5% said they had insufficient in-house knowledge to support new marketing initiatives, including social media. One positive development: only 8% said they were losing members and didn't know why, compared to 14.5% in 2013.

Under the 'Other' category, respondents reported in open-ended comments that they were worried about:

- Uncertain markets
- Declining revenues or membership numbers
- Shifting member needs and values
- Rapid change in members' profession or industry
- Loss of current revenue streams
- Relevance of educational offerings

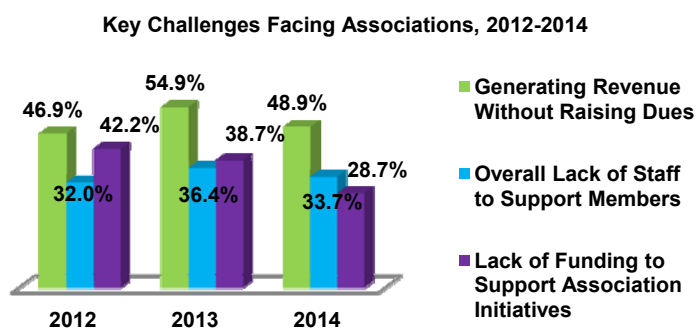
- Misalignment of staff around strategic initiatives
- Overuse of marketing lists
- Risk-averse, tunnelled organizational cultures, and
- An inability to hire due to lack of space.

Key Challenges Facing Associations, 2014



The most commonly-cited challenges for 2014 survey respondents were unchanged from 2012 and 2013. However, the *2014 Pulse Report* pointed to two small but revealing changes in the issues and anxieties facing association executives:

- Between 2013 and 2014, lack of staffing surpassed lack of funding as respondents' second-most prominent concern.
- On this survey question, respondents were allowed to choose from a list of concerns by checking all that applied. As one measure of the aggregate level of anxiety among association executives, the combined percentage points for the top three concerns on the list declined from 130 in 2013 to 111.3 in 2014.



The size of the overall *Pulse Report* sample limited the ability to cross-tabulate survey results to identify a trend. But compared to 2012 and 2013, the challenges facing the smallest associations seemed somewhat less striking in 2014 than in previous years.

	% of Sample	Lack of Funding	Generate Non-Dues Revenue	Too Few Staff	Create a Strategic Plan	Maintain Current Strategic Plan	Membership Declining, Don't Know Why	Insufficient Knowledge Among Staff
		51	87	60	48	45	15	33
Up to \$1 million	41.0%	37.0%	50.7%	31.5%	21.9%	24.7%	5.5%	16.4%
From \$1-4.9 million	41.6%	23.0%	50.0%	32.4%	31.1%	28.4%	13.5%	18.9%
From \$5-9.9 million	9.0%	31.3%	43.8%	50.0%	18.8%	18.8%	0.0%	12.5%
Over \$10 million	8.4%	11.8%	35.3%	29.4%	35.3%	17.6%	5.9%	29.4%

- While the smallest associations were most likely to express concern about limited funding, the issue seems to have abated in the last year. Among organizations with \$1 million or less in annual revenue, insufficient funding was a concern for 46.3% in 2013, but only 37% in 2014. Among associations with \$5 to \$9.9 million in revenue, 31.3% saw limited funding as a top concern.
- Difficulties raising non-dues revenue emerged as a top concern for associations of all sizes, but declined based on organizations' total revenue—from 50.7% among the smallest associations, to 35.3% among the largest.
- Organizations in the \$5 to \$9.9 million revenue range were most likely to report insufficient staffing levels (50%), while organizations above \$10 million in annual revenue were least likely (29.4%).
- Across the survey group, more than half of respondents (52.2%) reported difficulties developing or maintaining a strategic plan.

	% of Sample	Lack of Funding	Generate Non-Dues Revenue	Insufficient Staff	Create a Strategic Plan	Maintain Current Strategic Plan	Membership Declining, Don't Know Why	Insufficient Knowledge Base Among Staff
n=		51	87	60	48	45	15	33
Local	6.2%	36.4%	36.4%	27.3%	45.5%	18.2%	9.1%	18.2%
Regional/Provincial	36.0%	15.6%	48.4%	28.1%	23.4%	25.0%	4.7%	25.0%
National	50.0%	37.1%	50.6%	36.0%	27.0%	24.7%	12.4%	14.6%
North American/ Intl	7.9%	28.6%	50.0%	50.0%	28.6%	35.7%	0.0%	14.3%

- The 11 survey respondents who worked for local associations were most likely to be concerned about strategic plan development (45.5%), followed by limited funding and the quest for non-dues revenue (both at 36.4%). Non-dues revenue was even more likely to be a top issue for national (50.6%), North American/ international (50%), and regional/provincial organizations (48.4%).

- The 14 North American and international associations represented in the survey sample were most likely to be concerned about non-dues revenue and limited staffing (both at 50%), followed by the effort to maintain an existing strategic plan (35.7%).
- For the second year, national associations were over-represented among respondents whose organizations were losing members for unknown reasons: national organizations accounted for half of the survey group, but nearly two-thirds of the respondents with unexplained membership loss.

Member Relationships

A Return to Traditional Membership Models

Compared to their 2013 counterparts, association executives responding to the *2014 Pulse Report* said their organizations were more likely to emphasize individual memberships, less likely to offer organizational memberships, and more prone to coalesce around one or the other model rather than establishing a wider mix of membership categories. The survey showed that:

- 76.4% of associations offered individual memberships in 2014, compared to 65.8% in 2013.
- 52.2% offered corporate or organizational memberships in 2014, down from 62.7% in 2013.
- Respondents in the 'Other' category said their organizations offered memberships for students, board members, donors, and subscribers, as well as transferrable associate memberships and affiliations based on location.

Membership Types, Associations, 2013–2014		
	2013	2014
Individual Membership	65.8%	76.4%
Corporate/Organizational Membership	62.7%	52.2%
Other	12.7%	6.8%

The *2014 Pulse Report* indicated significant retrenchment in associations' interest in new membership models, raising the question whether last year's trend toward a more flexible, audience-centric approach to membership is losing favour.

- Only 32.9% of this year's survey respondents indicated that their organizations were considering new membership models, compared to 59.5% in 2013. If further research

New Membership Models Considered by Associations, 2013-2014		
	2013	2014
Interest in New Membership Models	59.5%	32.9%
<i>of which...</i>		
Customized	42.6%	54.7%
Multi-Tiered	54.1%	52.8%
All-Electronic	39.3%	45.3%
International	14.8%	17%
Open (no requirement to pay dues)	13.1%	9.4%
Other	14.8%	9.4%

confirmed the trend, it would be useful to understand what steps associations took to explore alternate membership models and why the effort was abandoned.

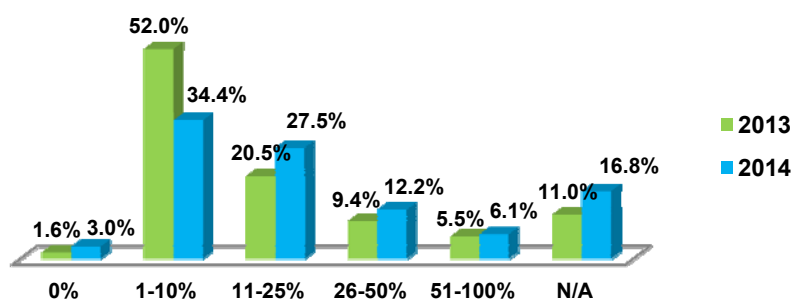
- Among the 53 participants who responded to this question in more detail, customized memberships were receiving wider consideration than last year (54.7%, compared to 42.6% in 2013), pushing ahead of multi-tiered memberships as the most popular form of unconventional membership.
- Respondents also showed stronger support for all-electronic memberships, with benefits restricted to web-based resources and programming.
- The proportion of organizations considering open memberships fell by nearly 30%, though the result may have limited significance given the small number of responses involved.

Discovering Where Members Engage

With three years of *Pulse Report* data in hand, it seems ever more evident that Canadian-based associations are scrambling to find the areas of interest where they can engage with members and meet their needs. While there is little evidence that traditional points of intersection are regaining ground, the sector as a whole is still learning how to adapt to changing audience demands and expectations. In the 2014 survey:

- “Not applicable” was once again the most common response for several types of association programming, including designations and certifications (49.6%), chapter events (47.3%), affinity programs (41.2%), and non-dues purchases (34.4%).
- 29% of 2014 respondents (up slightly from 27.6% in 2013) said only 1% to 10% of their members attended their national conferences. Another 16% (20.5%) said 11% to 25% of members attended.
- Only 22.9% reported that more than a quarter of members attended chapter events—a finding that should be particularly troubling for those associations that promote local engagement as a powerful benefit of membership.
- The 2014 *Pulse Report* reinforced the view that formal association membership is losing importance as a gateway to professional certification. In 2012, about a quarter of respondents said 76% to 100% of their members were participating in their certification programs. In 2013, only 14.2% reported that level of activity, while another 6.3% said 51% to 75% of members were involved with certification. The 2014 results raise the possibility of a permanent decline in one of the most powerful levers for association membership: 15.3% said 76% to 100% of their members were involved with certification, and another 7.6% said 51-75% were taking part.
- The results on social media participation suggested the ground where a new form of member relationship could emerge. In 2014, more than one-third of respondents (34.4%) reported that only 1-10% of their members engaged through social

Proportion Members Engaging with Associations Through Social Media, 2013-2014



media platforms, and another 27.5% put the proportion at 11-25%. However, those results were a marked improvement from 2013, when more than half of *Pulse Report* participants placed their estimates in the 1-10% range. Overall, these results do not yet suggest that social media engagement is making up for the quantity or quality of member contact that associations traditionally sought through more traditional channels. And, as we will see later in this report (*Stalling Out on Social Media*), 2014 survey participants were a bit *less* likely than their 2013 counterparts to report that their organizations were active on online networks.

Association executives' assessment of their most serious engagement challenges suggested that they're well aware of the emerging need for member-driven management and customized service. Consistent with the 2012 and 2013 results, the 2014 respondents expressed strong concern about difficulties meeting members' specific needs and a lack of member-driven research. And a new issue—the inability to properly track or measure member engagement—was the most serious of all, with 43.5% of *Pulse Report* participants identifying it as a top concern.

Compared to their 2012 and 2013 counterparts, 2014 respondents were somewhat less concerned about insufficient staffing, lack of a strategy or plan, tight budgets, and lack of marketing expertise. Among the 21.4% of respondents with other concerns, common themes included:

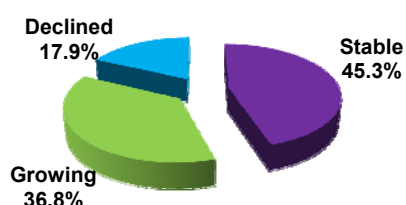
- Member engagement and distraction
- Difficulty making the case for a profession's value
- A surplus of volunteers for the available positions, and
- The need to serve the diverse needs of a global membership.

Top Three Member Engagement Challenges, 2012–2014						
	2012		2013		2014	
	Rank	%	Rank	%	Rank	%
Can't properly track or measure engagement	-		-		1	43.5%
Difficulty meeting members' specific needs	1	44.9%	1	51.2%	2	41.2%
Lack of member-driven research	3	38.1%	5	31.5%	3	35.9%
Insufficient staff	2	41.5%	2	44.9%	4	32%
Generation gaps among members	5	28.8%	6	26.8%	5	30.5%
Lack of strategy or plan	3	38.1%	3	39.4%	6	29.8%
Lack of budget	4	36.4%	4	37.8%	7	27.5%
Weak product or service offerings	6	27.1%	6	26.8%	8	22.9%
Other	8	19.5%	8	18.9%	9	21.4%
Lack of marketing expertise	7	25.4%	7	22.8%	10	15.3%

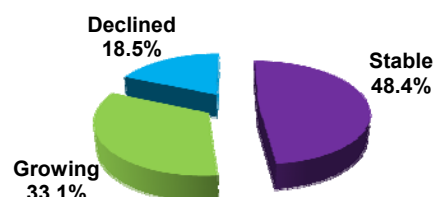
Reaching Farther

Associations' ability to attract and retain members has remained stable over the three years of *Pulse Report* research: 79.3% of respondents reported stable or growing membership in 2014, compared to 81.5% in 2013 and 82.1% in 2012. Of the 46 respondents in 2014 who reported membership increases in 2014, 52.2% (compared to 68.3% in 2013) said their organizations had grown by 1% to 5%, and 37% (compared to 22% in 2013) indicated growth between 6% to 10%. Of the 25 organizations with fewer members in 2014, 64% (47.8% in 2013) reported declines of 1% to 5%; 20% (34.8% in 2013) reported declines of 6% to 10%.

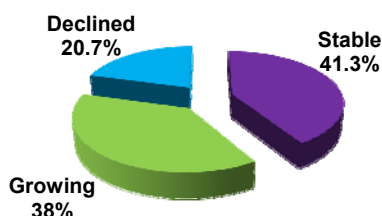
Association Membership Growth Trends,
2012



Association Membership Growth Trends,
2013



Association Membership Growth Trends,
2014



But the good news is that associations appear to be doing a better job of tapping the membership pools available to them, with 2014 *Pulse Report* participants reporting a significant improvement in the proportion of prospective members who had joined their associations. Almost half (48%) reported market penetration rates above 50%, an improvement from 41.5% in 2013 and 35.25% in 2012. And fewer than one in five (17.1%) reported market penetration rates below 25%, compared to 20.6% in 2012 and 29.3% in 2013. For the third year in a row, quite a large percentage of respondents—21.7% in 2014, 17% in 2013, and 22.1% in 2012—could not say what proportion of their target audiences their organizations had been able to sign up as members.

Market Penetration Rates, Associations, 2012–2014

	2012	2013	2014
<25%	20.6%	29.3%	17.1%
26-50%	22.1%	12.2%	13.2%
51-75%	14.75%	17.7%	20.4%
76%+	20.5%	23.8%	27.6%
Unsure	22.1%	17%	21.7%

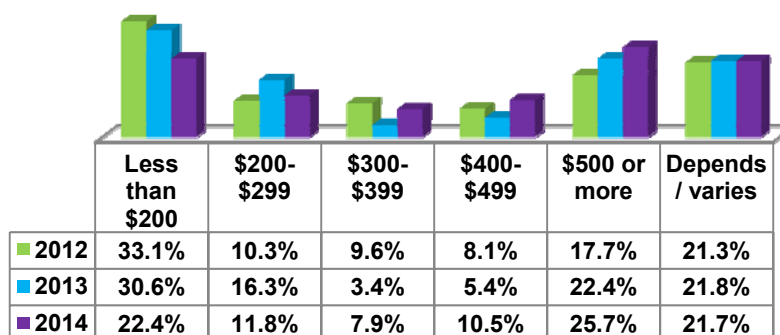
In the months and years ahead, it will be interesting to see whether associations can sustain higher market penetration rates—and if so, whether the resulting revenue infusion will lead to higher budgets or staffing levels to meet rising demand for innovative member services.

Dues Revenue on the Rise

Compared to past *Pulse Reports*, the 2014 survey data also indicated that membership dues were beginning to increase, after a couple of years of relative stagnation.

- The proportion of respondents whose organizations charged \$400 or more for membership increased from 25.6% in 2012 and 27.8% in 2013 to 36.2% in 2014.
- The proportion charging up to \$300 in annual dues declined from 43.4% in 2012 and 46.9% in 2013 to 34.2% in 2014.

Association Membership Fees, Canada, 2012-2014



There may be a medium- to long-term vulnerability for associations that choose to deepen their reliance on traditional membership dues, and the *2014 Pulse Report* revealed declining interest in emerging membership and revenue models. But as long as associations are prepared to charge higher dues, and enough members are willing and able to pay them, the added revenue will help organizations address some of the resource limitations in this report, after several years of underfunding and cost cutting.

The *2014 Pulse Report* results show Canadian membership dues surging ahead of the rates documented in the *2014 Membership Marketing Benchmark Report*, a similar annual study conducted by Marketing General Inc. (MGI) for the U.S. association market. On the whole, membership dues were a bit lower in the U.S. in 2014 than they were in Canada.

Association Membership Fees, Canada and the U.S., 2014		
	Canada	U.S.
Less than \$200	22.4%	35%
\$200-\$299	11.8%	13%
\$300-\$399	7.9%	10%
\$400-\$499	10.5%	5%
\$500 or more	25.7%	13%
Depends (varies based on requirements)	21.7%	23%

The 2014 *Pulse Report* also picked up a modest increase in associations' willingness to raise their dues at all. Although the majority (54%) of respondents said their organizations preferred ad hoc dues increases, the proportion of associations issuing regular, annual increases grew from 20.4% to 24.3%, while the percentage whose organizations never increased rates fell by more than half, from 11.6% to 5.3%. Notwithstanding the general trend, in their more detailed responses to this question, several survey participants said it had been 10 years or more since their organizations' membership dues had increased. One respondent reported that the "last increase was in 1992."

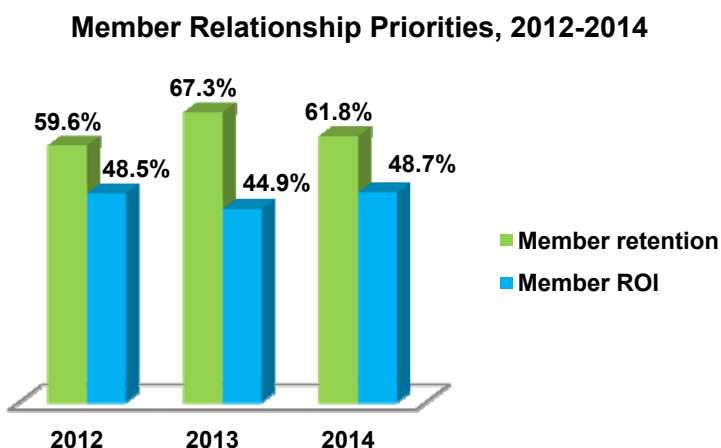
Association Dues Increases, Canada, 2012–2014			
	2012	2013	2014
Annual	18.4%	20.4%	24.3%
Biennial	5.1%	3.4%	4.6%
As needed	58.1%	49%	54%
Never	9.6%	11.6%	5.3%
Other	8.8%	15.6%	11.8%

- Among the associations that did raise their dues, 41.5% of the increases (up from 38.1% in 2013) were in the range of 1% to 3%, 21.7% (17.0% in 2013) were between 4% and 6%, 6.58% (12.2% in 2013) were between 7% and 10%, and 25.7% of the respondents were unsure of the percentage.

Priorities for Member Relations: Transaction Trumps ROI

Allowing for variability from one year to the next, *Pulse Report* respondents over the last three years have consistently shown more interest in member retention than in the day in, day out effort to build member value that helps make continuing affiliation a foregone conclusion.

And yet, for the third year in a row, the *Pulse Report* showed that associations gain when they deliver the ROI and engagement that give members a reason to sign up, but suffer when they focus on more tactical functions related to member recruitment and retention. As we noted last year, it's difficult to separate cause from effect: to determine whether a more integrated membership strategy is a gateway to member attraction, or whether the revenue that results from higher market penetration gives associations the funds and resources to deliver more comprehensive, member-focused programming.



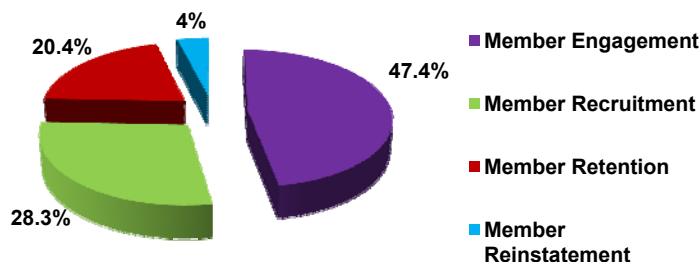
Association Priorities by Market Penetration Rates: 2014				
Market Penetration	Member Recruitment	Member Retention	Member ROI	Member Engagement
Entire sample	61.2%	61.8%	48.7%	55.3%
<25%	84.6%	73.1%	30.8%	34.6%
26-50%	72.7%	68.2%	27.3%	50.0%
51-75%	63.6%	63.6%	57.6%	42.4%
>75%	21.4%	42.9%	64.3%	81.0%
Unsure	71.4%	60.0%	40.0%	45.7%

Member Recruitment as an Association Priority, by Market Penetration Rate, 2012–2014			
	2012	2013	2014
Entire sample	63.2%	62.6%	61.2%
<25%	85.7%	76.7%	84.6%
26-50%	66.7%	72.2%	72.7%
51-75%	65.0%	61.5%	63.6%
>76%	50.0%	34.3%	21.4%
Unsure	50.0%	76%	71.4%

- Again in 2014, respondents were steadily less likely to list member recruitment and retention as top priorities as their market penetration increased from 25% to 50% to 75%, and interest in these basic survival functions dropped off sharply in associations with market penetration above 75%. The straight-line drop in concern about member recruitment was obvious in 2012, and even more pronounced in 2013 and 2014.
- Organizations with 26% to 50% market penetration were least concerned about member ROI and among the most concerned about recruitment and retention. Their focus on ROI dropped sharply over the last year, from 50% in 2013 to 27.3% in 2014.
- Associations with the highest market penetration were more concerned with member ROI, and had by far the sharpest focus on member engagement. In the absence of more in-depth research to separate cause from effect, this continuing data trend points to an opportunity for associations to plan their own small experiments—at some point, the best way to test the value of a member engagement and ROI strategy is to run a test and measure the results.

And the time for experimentation may be right now: in 2014, *Pulse Report* respondents identified member engagement as the relationship management priority to which their associations were most interested in devoting additional resources. Asked to identify the one membership activity where they would want to see a budget increase next year, nearly half of survey participants (47.4%) identified engagement, compared to 28.3% for member recruitment, 20.4% for member retention, and 4% for member reinstatement.

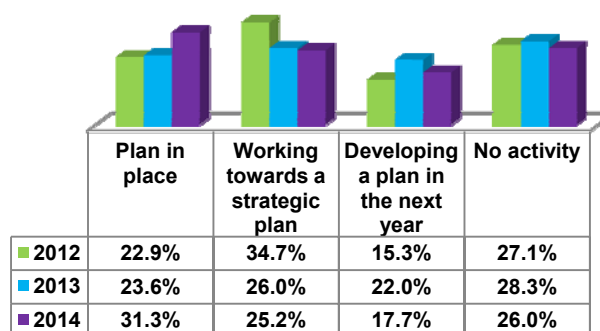
Associations' Budget Priorities for New Membership Activities, 2014



Reaching and Engaging Younger Members

Three years of *Pulse Report* data have tracked associations' progress in developing plans to attract younger generations of members. The results show that just over half of organizations (56 to 60% over the three years of research) are at some point in the strategic planning process, and three-quarters recognize the issue. Just over one-quarter of respondents consistently report no activity to address the generational shift in association membership.

Engaging Younger Members, 2012-2014



Across the three-year span, the differences fall within the range of statistical variability—a troubling result for associations whose longer-term survival may depend on an ability to actively and consistently embrace new generations of members, with dramatically different expectations.

Challenges Meeting Membership Goals

Respondents used a 1-5 scale to rank the top barriers they faced in meeting their membership goals. Measurement and reporting emerged as the most significant obstacles, followed by technology issues that impeded members' access to information.

Barriers to Association Membership Activities, 2014 (1-5 scale)	
Inability to measure member engagement	3.43
Inadequate reporting tools	3.24
Inadequate online self-serve option	3.06
Meeting members' mobile needs	3.00
Lack of website personalization	2.94
Annual membership system costs higher than expected	2.94
Poor integration between membership management and website	2.82
Multiple databases and information silos	2.62

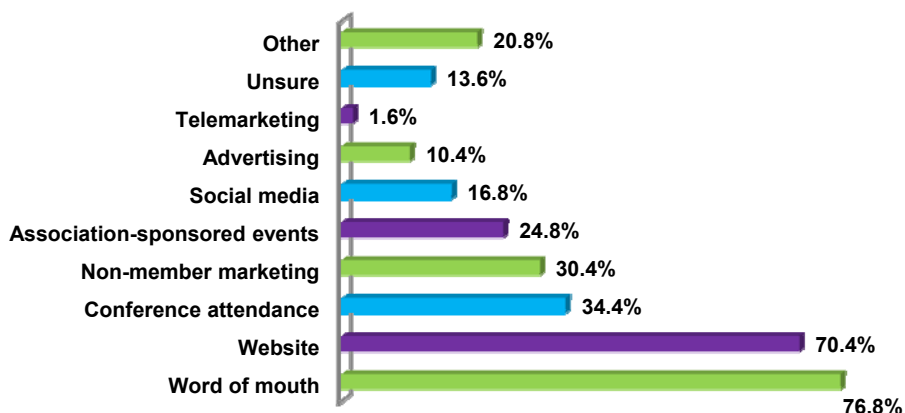
The Membership Life Cycle

At every stage in the member relationship, any association must constantly strive to build, maintain, and deepen the sense of connection and purpose that lead to greater ROI for members and steadier renewals for the organization. The *2014 Pulse Report* tracked some of the disconnects that may prevent associations from reaching out effectively.

New Member Outreach

An alarming observation on the state of associations in Canada emerges from the simplest of questions in the *2014 Pulse Report*: asked whether their organizations had marketing plans in place to attract new members, 70 said yes, 55 said no, and 54 declined to answer the questions. This means that, at best, 56% of associations are making any effort to reach their target audiences and offset the steady attrition of existing members.

Top Channels for New Members to Learn About an Association, 2014



Among the 125 respondents who had anything to say about new member recruitment, more than three-quarters (76.8%) said new members were likely to hear about their organizations through word of mouth. The next-most common channels were websites (70.4%) and conference attendance (34.4%).

Although word of mouth and a deliberately-designed website are important elements of an integrated content marketing campaign, the limited emphasis on social media suggests a more casual approach to word of mouth as a pathway for identifying prospects and recruiting new members.

Why Members Join

The *2014 Pulse Report* showed minor changes in the factors that respondents saw as motivating new members to join an association. The shifts were much more dramatic in 2013, when education fell from first to fifth rank, networking advanced from third to first, and affinity programs entered the top-five list. In 2014, education regained some support, with 11.2% of respondents identifying it as the top reason for new members to join. Advocacy programs fell from third to last rank among the top five, while affinity programs continued to gain importance. Access to specialized information held steady, in second place, for the third year in a row.

Top Reasons to Join a Canadian Association, 2012–2014						
	2012		2013		2014	
	Rank	%	Rank	%	Rank	%
Networking	3	16.0%	1	24.3%	1	23.2%
Access to specialized information	2	16.8%	2	19.1%	2	20.8%
Education	1	24.4%	5	7.4%	3	11.2%
Affinity programs			4	8.8%	3	11.2%
Advocacy	4	10.9%	3	14.7%	4	10.4%

Welcoming New Arrivals

For the third year in a row, *Pulse Report* participants identified member welcome kits, association newsletters, and membership cards or certificates as the top three tools for welcoming new members. Between 2013 and 2014, invitations to local meetings or upcoming events became considerably more popular, listed by 43.2% of 2014 participants, compared to 30.1% in 2013. Personal welcome calls and special discount offers became less prominent.

Welcoming New Members, 2012–2014			
	2012	2013	2014
Member welcome kit	67.2%	81.6%	76.8%
Association newsletter	71.4%	73.5%	75.2%
Membership card or certificate	45.4%	43.4%	44.8%
Invitation to local meeting/upcoming event	33.6%	30.1%	43.2%
Personal welcome call	24.4%	25%	16.8%
Offer special discounts on purchases	14.3%	17.6%	13.6%
We don't send any special communication	10.9%	4.4%	8.8%
Onboarding webinar	2.5%	4.4%	3.2%
Other	11.8%	11.8%	3.2%

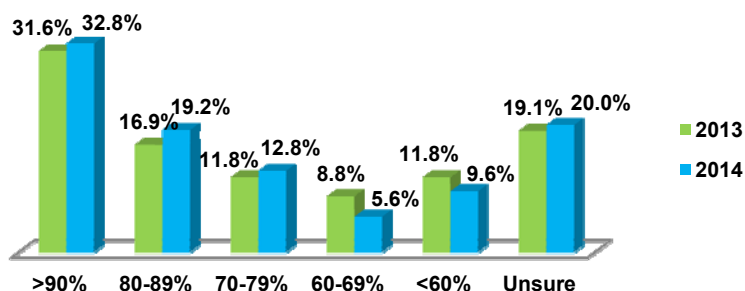
A Surge in Overall Member Retention?

Consistent with the 2013 survey results, *2014 Pulse Report* participants placed strong emphasis on building long-term member relationships, with 28% focusing on member retention, only 6.2% treating member recruitment as a stand-alone priority, and 65.8% placing the two functions on an equal footing.

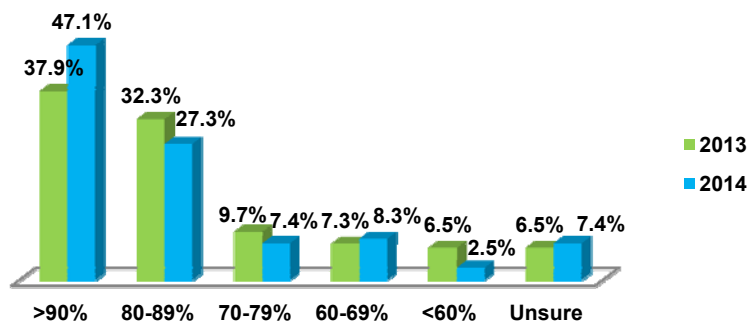
That level of attention may be paying off. Associations' retention rates among first-time members showed steady improvement between 2013 and 2014, with small increases in the proportions of *Pulse Report* participants who reported rates above 70%, 80%, and 90%. The results for lifetime retention rates showed a significant enough jump that it will take another year of data to determine whether the proportion of organizations with overall retention above 90%—just over one-third in 2013, but nearly half in 2014—is a statistical anomaly.

Either way, the observation Greenfield first put forward in the *2012 Pulse Report* still holds true: a 20% annual attrition rate, carried over five years, would leave an organization

Member Retention Over One Renewal Period, 2013-2014



Overall Retention Rates, 2013-2014



with only 32.75% of the members who signed up five years ago, while a 30% attrition rate would leave them with only 16.8%. Even a five-year retention rate of 90% per annum translates to a 41% loss over the period, pointing to the need for a robust member recruitment *and* retention program.

By comparison, the *2014 Membership Marketing Benchmark Report* by Marketing General Inc. (MGI) documented much higher attrition rates at all points in the member life cycle.

Member Retention Rates, Canada vs. U.S., 2014				
	First Year		Overall	
	Canada	U.S.	Canada	U.S.
>90%	32.8%	26%	47.1%	29%
80-89%	19.2%	14%	27.3%	38%
70-79%	12.8%	14%	7.4%	17%
60-69%	5.6%	14%	8.3%	8%
<60%	9.6%	32%	2.5%	9%
Unsure	20%	N/A	7.4%	N/A

Maintaining Contact with Members

After incremental improvement in 2013, the 2014 *Pulse Report* showed no significant change in the number of member touchpoints associations used to encourage renewals. The proportion that scheduled one to three touchpoints fell slightly, from 45.2% to 41.3%, while those with four or more held steady (40.5% in 2014, compared to 39.6% in 2013). The proportion of associations with no renewal programs at all rebounded to 5.8% in 2014, after declining from 5.1% to 3.2% in 2013.

The limited number of touchpoints could be explained by the time associations usually allow for the member renewal process. More than half of organizations set aside two months or less for renewals, and, consistent with the 2013 survey results, more than three-quarters allow three months or less—though front-line marketing practice and supporting research show that it takes eight to 10 touchpoints to motivate a purchase decision and action.

Touchpoints for Membership Renewal, 2012–2014			
	2012	2013	2014
1-3	52.1%	45.2%	41.3%
4-6	23.1%	32.3%	33.1%
7-9	6.8%	7.3%	7.4%
10+	6.8%	8.1%	9%
None	5.1%	3.2%	5.8%
Unsure	6.1%	4.0%	3.3%

Months Before Expiry When Renewal Outreach Begins, 2014	
1 month	24.8%
2 months	26.5%
3 months	24.8%
4-5 months	11.6%
6 months	1.7%
6-9 months	2.5%
Unsure	8.3%

For the third year in a row, email marketing and direct mail were by far the dominant channels for membership renewal messages from associations. 2014 saw the appearance of text messaging and the virtual disappearance of fax broadcasting in the membership marketing repertoire, and social media regained some of the popularity they appeared to lose in the 2013 *Pulse Report* results. The combination of in-house and some outsourced telemarketing held steady as an option for just under one in four respondents (22.6% in 2013, 22.3% in 2014).

Membership Renewal Channels, 2012–2014			
	2012	2013	2014
Email marketing	79.5%	90.3%	81.8%
Direct mail	64.1%	54%	60.3%
Social media	28.2%	21.8%	25.6%
In-house telemarketing	23.9%	19.4%	21.5%
Fax broadcast	6%	4%	1.7%
Texting	0.9%	0%	1.7%
Outsourced telemarketing	3.4%	3.2%	0.8%
Other	6.8%	12.9%	14.9%

One challenge and one opportunity could reshape this pattern of marketing activity in the year ahead. The obvious challenge is the introduction of Canada's Anti-Spam Law (CASL), which came into force July 1 with a requirement for organizations to secure recipients' explicit permission before communicating by email. As this year's *Pulse Report* went into final production, early anecdotal reports indicated that many Canadian organizations were losing large shares of their established email lists. It wasn't yet clear how the new rules would affect marketing to non-members and other stakeholders—or whether CASL would actually give organizations a surer, more streamlined path to their most engaged audiences. Either way, the challenge pointed directly to the opportunity: As noted in past *Pulse Reports*, a single member touchpoint might be an email, a phone call, a text message, a direct mail letter or post card, or social media messages, and the most effective campaigns are often the most deliberately varied. If CASL prompts associations to develop integrated content marketing campaigns, relying on a wider mix of channels and a deep commitment to member engagement, the results for the sector could be transformative.

The End of the Road

After a membership has expired, nearly two-thirds of respondents' organizations (64.5%, down marginally from 65.3% in 2013, more dramatically from 73.9% in 2012) followed up one to three times. 19.8% (compared to 24.2% in 2013) followed up four to six times, and only 1.7% followed up seven or more times, down from 2.4% in 2013 and 8.5% in 2012. The largest share of associations said they continued their outreach to former members for three months or less after expiry.

Once again in 2014, respondents' use of telemarketing increased to 45.5% (43% in-house, 2.5% outsourced) for expired members, but email was still the most popular outreach tool, used by 77.7% of organizations. At all stages in the member renewal process, in-house telemarketing gained ground over outsourced services between 2013 and 2014, suggesting a possible need to train, guide, and augment limited in-house staff resources. Consistent with last year's *Pulse Report*, 76% of respondents said their organizations tried to find out why members failed to renew.

- 31.5% said former members saw no value in their memberships, or could not justify their membership fees, down from 42.1% in 2013 and 44.2% in 2012.
- 29.3% of departing members were leaving their profession, leaving their company, or retiring, a sharp increase from 20% in 2013 and 22.2% in 2012. Retirements have steadily increased over the life of the *Pulse Report*, nearly doubling between 2012 and 2014, consistent with Statistics Canada's projection that boomer retirements would begin to peak in 2014.
- 9.8% of lapsed members said their employers would no longer pay for their memberships, compared to 7.4% in 2013 and 4.2% in 2012.

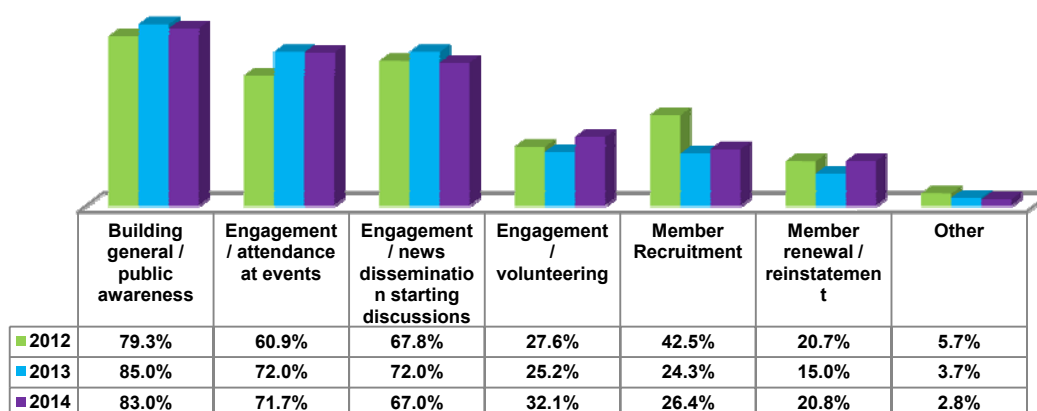
Reasons for Membership Cancellation, 2012–2013			
	2012	2013	2014
Does not see value/dissatisfied with membership	24.2%	17.9%	21.7%
No longer in profession	15.8%	10.5%	14.1%
Cannot justify membership fees	20.0%	24.2%	9.8%
Member has retired from profession	5.3%	8.4%	9.8%
Employer will no longer pay for membership	4.2%	7.4%	9.8%
Personal financial reasons	7.4%	9.5%	7.6%
Contact has left company/no longer reachable	2.1%	1.1%	5.4%
Switched to a competing association	1.1%	1.1%	2.2%
Lack of engagement	4.2%	2.1%	1.1%
Unsure	3.2%	3.2%	2.2%
Other	12.5%	14.7%	16.3%

Stalling Out on Social Media

The proportion of survey respondents with active social media programs actually declined between 2013 and 2014, from 88% to 82.8%. There was a corresponding increase in organizations that expected to delay the introduction of social media programs, from 4.8% to 10.5%. And, consistent with the 2013 survey reports, one-quarter of respondents declined to answer the question. If all of those participants were still inactive on social media, it would indicate that nearly four in 10 associations—38% in 2014, compared to 31.2% in 2013—had taken no steps to establish an online presence.

Associations' Social Media Participation 2013-2014		
	2013	2014
Currently active on social media	88%	82.8%
Plan to be in the next year	7.2%	6.7%
Plan to be in the next five years (2013) or two years (2014)	4.8%	10.5%
Declined to answer the question	27.5%	25.1%

Use of Social Media, 2012-2014



For the third consecutive year, *Pulse Report* participants identified traditional, outbound functions like public awareness, event promotion to members, and member news dissemination as their organizations' top uses of social media. But their survey responses suggested their organizations are still making only limited use of social media tools that could help them transform their programs and deepen their member relationships. In 2013 and 2014:

- Facebook and Twitter were the most commonly-used social media platforms, followed at some distance by public LinkedIn groups.

- Except for Facebook and Twitter, “not applicable” was the most frequent participant response for all the major social platforms, including public and private LinkedIn groups, YouTube, Google+, blogging, and in 2014, guest blogging on other organizations’ sites.

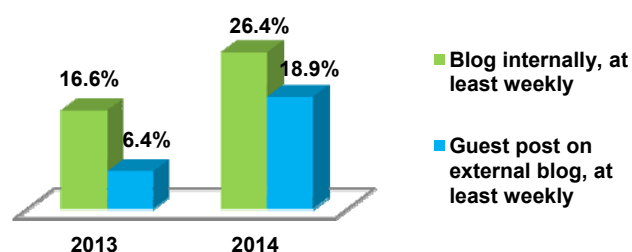
- The data for the three most popular platforms suggested a degree of polarization in associations’ comfort with and use of social media. Only a relatively small cluster of

Frequency of Associations’ Social Media Activity, 2013-2014				
	2013		2014	
	Twice Weekly	Several Daily	Twice Weekly	Several Daily
Facebook updates	59.3%	11.7%	51%	13.2%
Twitter activity	64.1%	15.5%	62.3%	20.75%
LinkedIn (public)	27.9%	5.2%	34%	7.6%

respondents reported that they used Facebook, Twitter, or LinkedIn several times per day, and that group showed healthy growth between 2013 and 2014. However, the larger mass of organizations that used their chosen platforms at least twice weekly declined fairly substantially for Facebook, and marginally for Twitter. (Twice-weekly use of public groups on LinkedIn was less frequent overall, but increased between 2013 and 2014.)

- Similarly, although 60.4% of associations had no internal blog, and 69.8% never produced guest blogs, the proportion of active bloggers increased between 2013 and 2014.

Association Blogging, 2013-2014



Associations’ social media patterns in 2013-2014 may have been an accurate reflection of members’ online presence: Nearly three-quarters of participants (71.7% in 2014, down from 76.7% in 2013) said up to 25% of their members were active on social networks. However, social media professionals would caution against confusing cause and effect: With the association community going through a rapid and profound generational shift, it may be that the next generation of members are out there to be engaged and recruited on social media, but only by associations that have the skills and technology tools to build effective online relationships.

Estimated Percentage of Members Using Public Social Networks, 2014

1-5%	17.9%
6-10%	23.6%
11-25%	30.2%
26-50%	12.3%
>51%	3.8%
Unsure	12.3%

But in 2014, only a small proportion of associations had dedicated the steady, significant staff resources they would need to fully embrace the opportunity. Survey respondents reported the following commitments:

Associations' Social Media Staffing, 2014				
	N/A	Occasional/ As Needed	5-19 Hours Per Week	Half- or Full-Time
Senior Executive	56.6%	34%	8.5%	1%
Senior Marketing & Communications	33%	32.1%	29.3%	5.7%
Senior Policy/Research	81.1%	12.3%	5.7%	1%
Junior Marketing & Communications	56.6%	16%	16%	11.3%
Junior Policy/Research	88.7%	6.6%	2.8%	1.9%
Marketing & Communications Intern	81.1%	7.6%	6.6%	4.7%
Other Staff	44.3%	42.5%	10.3%	2.8%

In all categories, the largest share of social media staffing was in the range of five to nine hours per week or less. As we observed in 2013, “this strongly suggests that associations expect to build an authentic, effective online presence while treating social media as an afterthought, or an occasional add-on to other duties.”

Measurement and analytics was another area where the 2014 results showed little or no progress. Consistent with the 2013 survey results, a large proportion of *2014 Pulse Report* respondents reported that their organizations practiced some degree of online measurement—91.5% (up from 78.5%) for their websites, 73.3% (up from 67%) for their social media presence, and 25.5% (up from 23.8%) for their blogs.

Consistent with last year's results, about half of 2014 respondents considered their organizations' social media programs somewhat successful, and about one-third said implementation had just begun. The proportion who considered their programs unsuccessful declined from 9.3% to 1.9%.

Satisfaction with Social Media Platforms, 2012–2013			
	2012	2013	2014
Very successful program	11.6%	9.3%	8.5%
Somewhat successful program, but more could be done with strategic planning	51.7%	48.6%	52.8%
Implementation has just begun, so can't comment	25.3%	30.8%	34.9%
Unsuccessful program	5.7%	9.3%	1.9%
Unsure	5.7%	1.9%	1.9%

What Keeps Association Executives Up at Night

Survey participants identified a handful of specific issues of concern that largely reinforced the primary challenges that emerged from the rest of the *Pulse Report* research:

- Demographic or generational shifts
- Declining member interest
- Member relevance and value
- Affiliate chapter relations
- Funding and revenue
- Volunteer engagement
- Limited member growth and retention.

Audience Profile

The 2014 *Pulse Report* was Greenfield Services Inc.'s third annual survey of the health of Canadian-based associations. Greenfield's past research publications include:

- The 2012 and 2013 *Pulse Reports*
- The Future of Tradeshow (2011)
- Meeting Planner Preferences (2010).

2014 *Pulse Report* respondents reported the following characteristics:

- 42.7% of respondents were executive directors or CEOs, 18.5% had direct responsibility for membership operations, 9.5% were in communications, and 9% were finance or administration officers. Many of the 15.7% in the Other category were assistant executive directors, chief operating officers, and directors of operations or administration, communications, membership, and human resources.
- 50.0% of the associations were national organizations, 36% were provincial or regional, 8% operated across North America or internationally, and 6.2% were local.
- Just under one-third of respondents (31.5%) said their organizations had chapters, and five respondents worked directly for chapters.
- This year's *Pulse Report* results continued a general trend toward higher staffing levels, suggesting that many associations are gradually building in-house capacity. 35.4% were operating with fewer than five paid staff in 2014, compared to 38.2% in 2013 and 47.6% in 2012. The proportion with six to 10 staff increased from the 20-21% range in 2012 and 2013 to 27% in 2014. 24.7% of this year's respondents worked for organizations with 11 to 25 employees, compared to 19.7% in 2013; 12.9% had more than 25 paid staff, compared to 21.4% in 2013.
- Consistent with last year's survey, a slim majority of survey participants (51.1%) reported that they worked on small teams, in which individual staff played multiple roles. 67.4% of the organizations had defined executive, administrative, and/or financial offices, 59.6% had distinct marketing and/or

Association Staffing Levels, 2012–2014			
	2012	2013	2014
<5 staff	47.6%	38.2%	35.4%
6-10 staff	20.4%	20.8%	27%

communications functions, 52.8% had designated membership teams, 46.6% had dedicated event or program offices, and 33.7% had distinct information technology or database management operations.

No Budget Relief for Associations, 2012–2014			
Annual Budget	2012	2013	2014
≤\$1 million	56.5%	41%	41%
\$1-\$4.9 million	28.6%	39.3%	41.5%

For the second year in a row, four-fifths of respondents (80.3% in 2013, 82.5% in 2014) worked for organizations with annual budgets of \$4.9 million or less. 41.5% of the organizations were in the \$1 to \$4.9 million range, compared to 39.3% in 2013 and 28.6% in 2012. In 2013, 8.4% of respondents reported operating budgets over \$10 million, while 9% had budgets between \$5 and \$9.9 million.

Conclusion: The Way Forward

This year's *Pulse Report* points toward the worrying conclusion that Canadian-based associations are falling short of the transformative change they will need if they hope to adapt and thrive.

Faced with shifting member expectations, rapid evolution in technology, and new rules of engagement for marketing and communications, all accelerated by the arrival of new generations in the work force, the sector's overall response has been slow and incremental. Although there are respondents that have reported that statistics that we would consider examples to follow, which is a contrast to the wider trend, associations are missing out on a period of dynamic change that is bringing lasting benefit to their members, and will almost certainly continue to reshape the work structures, practices, and tools those members will want to see reflected in their association relationships.

The good news is that, for the most part, this market transition is not yet translating into serious disadvantage for the organizations that participated in the *2014 Pulse Report*. Budgets are still a challenge, but staffing levels are up, and member retention has improved so markedly that Greenfield advises waiting for another year of data to confirm the apparent trend. This means the next three to five years will present the Canadian association community with a choice of futures:

- To the extent that they maintain a short-term, tactical focus, associations will fail to account for a cluster of risks that aren't yet evident in their day-to-day operations, but could have serious implications over the medium to longer term. Organizations that choose this path will be ill prepared for many of the trends reflected in the *Pulse Report*, and many of them will be left scrambling to survive.
- A bright future could be in store for associations that treat the next year or two as a window of opportunity, taking heart that they have largely recovered from some very lean years, but recognizing that this is the worst time to relax. The most effective, strategic association executives will gear up to meet an uncertain future, retool their organizations, build a robust social media presence based on a full embrace of content marketing principles, and make a deliberate effort to reach out and attract new generations.

These are the organizations that will best ensure their own stability and sustainability over the longer term.

Change is rarely easy, worthwhile change is rarely comfortable, and it can verge on a full-time job to understand and get ahead of that change, it can be counterproductive to put too much emphasis on the stumbles and pitfalls along the way. But it can be risky to default to quick, short-term solutions in circumstances that call for deliberate, long-term change.

The association community is at a critical moment of choice, and that choice should be driven by the best available data. In this year's *Pulse Report*, Greenfield Services Inc. has set out to acknowledge the great strength, depth, and insight in the Canadian association sector, while documenting the important issues that will require more sustained, strategic attention in the months ahead.

About Greenfield Services Inc.

Greenfield Services Inc. is a business development and management firm devoted to membership-based, professional and trade organizations. Founded in 1998 by Doreen Ashton Wagner and her partner Heinz Wagner, the firm offers a suite of services designed to support associations in growing and engaging their membership, along with key external stakeholder relationships.

The company is based in Alexandria, Ontario. Service offerings include:

- Association Management;
- Membership Marketing;
- Membership Engagement Services;
- Event Marketing;
- Sponsorship and Exhibitor Sales.

Acknowledgements

Greenfield gratefully acknowledges the support and collaboration of Mitchell Beer, President of *Smarter Shift* in Ottawa, Canada. Mitchell's insightful analysis and meticulous attention was critical to the production of this report. We are proud to have Mitchell and his team as valued partners in the production of Greenfield's print and online content.



We also want to extend a special thank you to our new partner on the research this year, Advanced Solutions International. Andrew Sherwin and his team were valued contributors with the formulation of the questions, as well as the dissemination of survey requests to their extensive client and prospect list to encourage completion of this landmark research.

