



MEMBERSHIP
CONSULTANTS

Pulse of Membership Survey Recap

2023 MID-YEAR SURVEY RESULTS

AND

MEMBERSHIP TRENDS



Introductions



Dana Hines

President

Dana@Membership-Consultants.com



Tabetha Pund

Strategic Planning & Project Manager

Tabetha@Membership-Consultants.com



Today's Webinar

- Webinar is being recorded.
- Ask your questions!
 - You can type questions to our presenters in the chat box
- Quick Q&A at the end.
- Send unanswered questions to us at any time!



Today's Agenda

- Pulse of Membership Background
- Demographics
- Trends in Acquisition and Renewals
- Digital, Social Media and Mobile Marketing
- Staffing and Salary
- Results by Niche Audiences
- Dues, Categories and Benefits Changes
- Membership Forward
- Q&A



Pulse of Membership Survey

- When?
 - Started in 2009
- Who?
 - Membership managers
 - All types of organizations
- Why?
 - Get the “pulse” of membership
 - See trends in our industry
- What?
 - Benchmarking for membership managers
 - DATA!

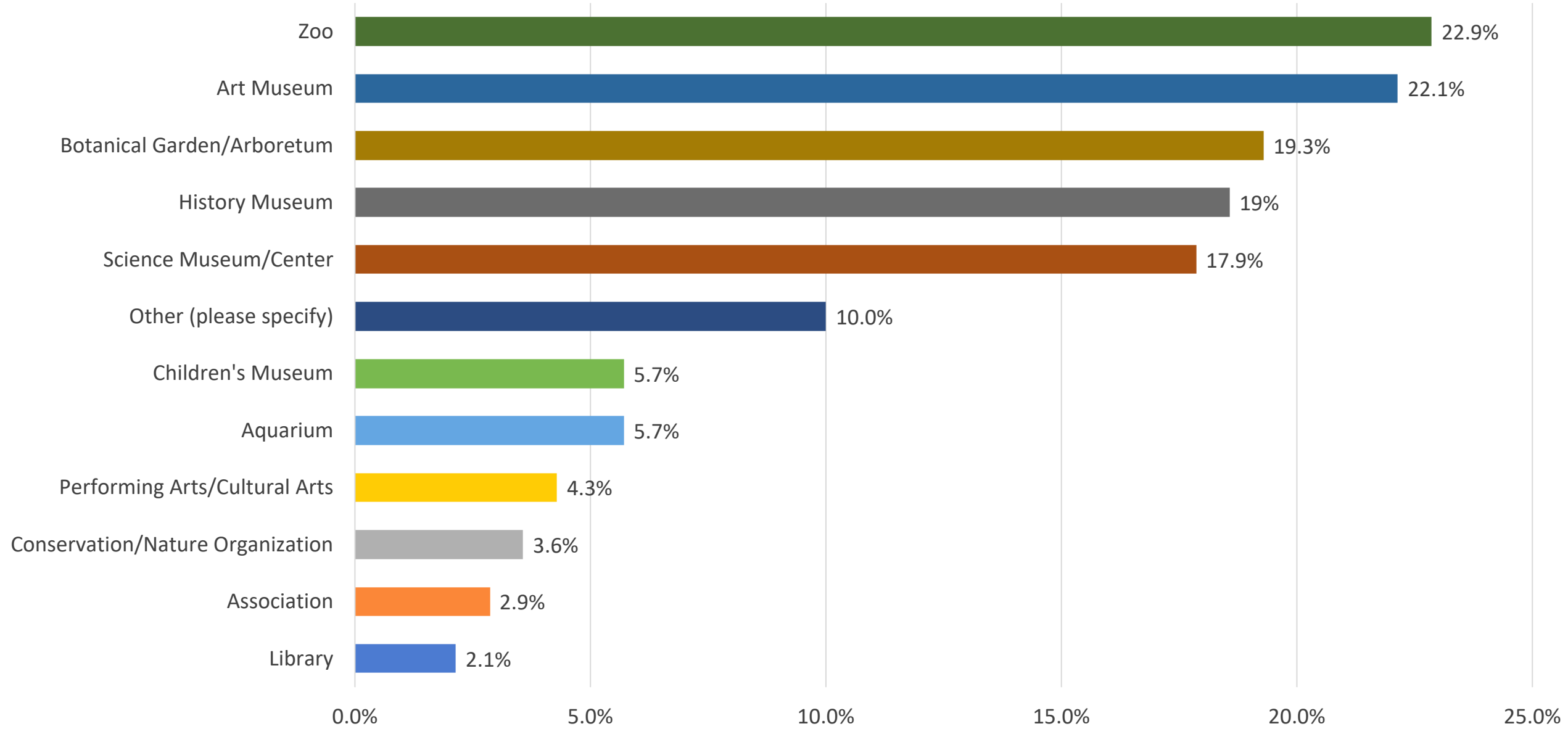


Demographics

Pulse 2023 Mid-Year Data

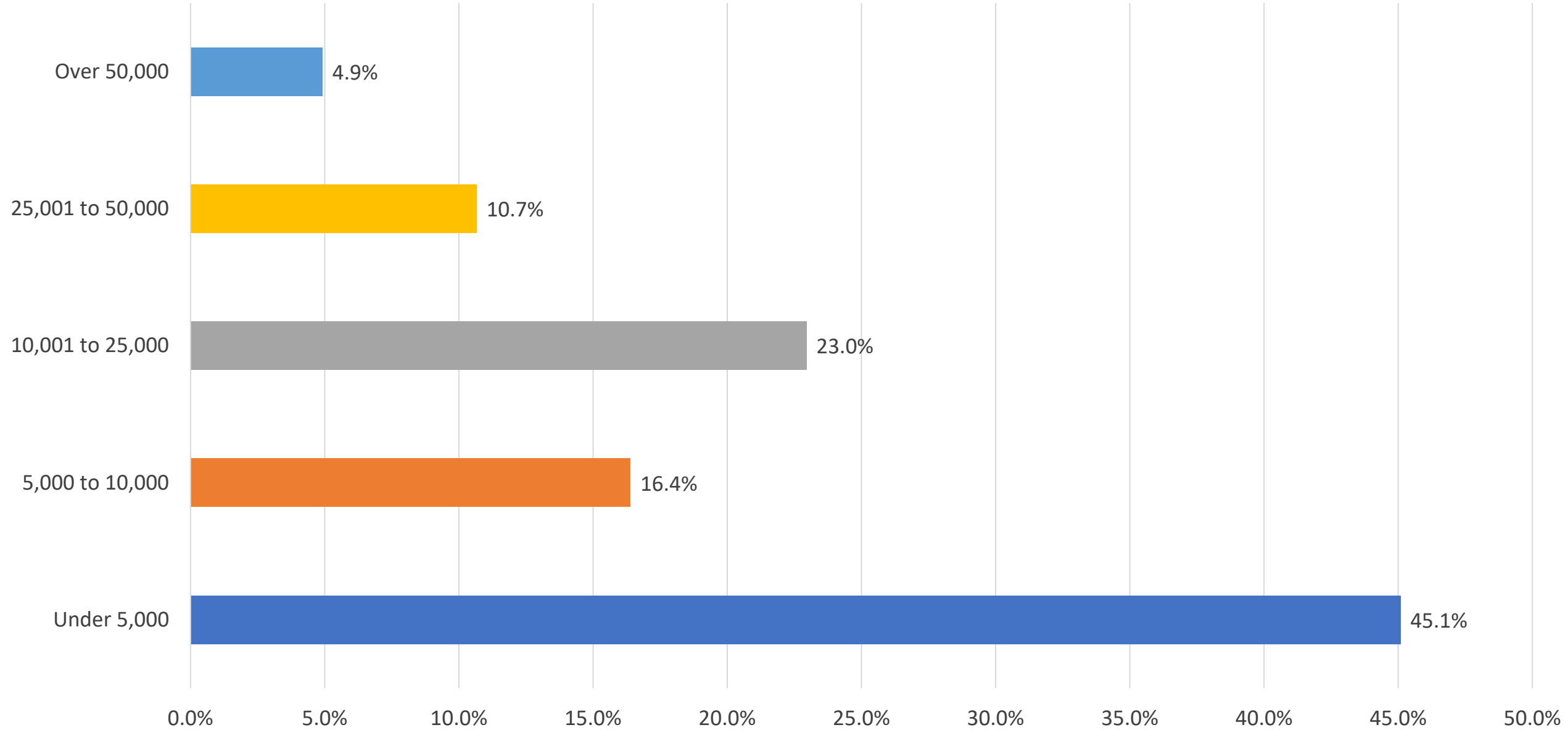


What type of organization does your membership serve?





How many members does your organization have?



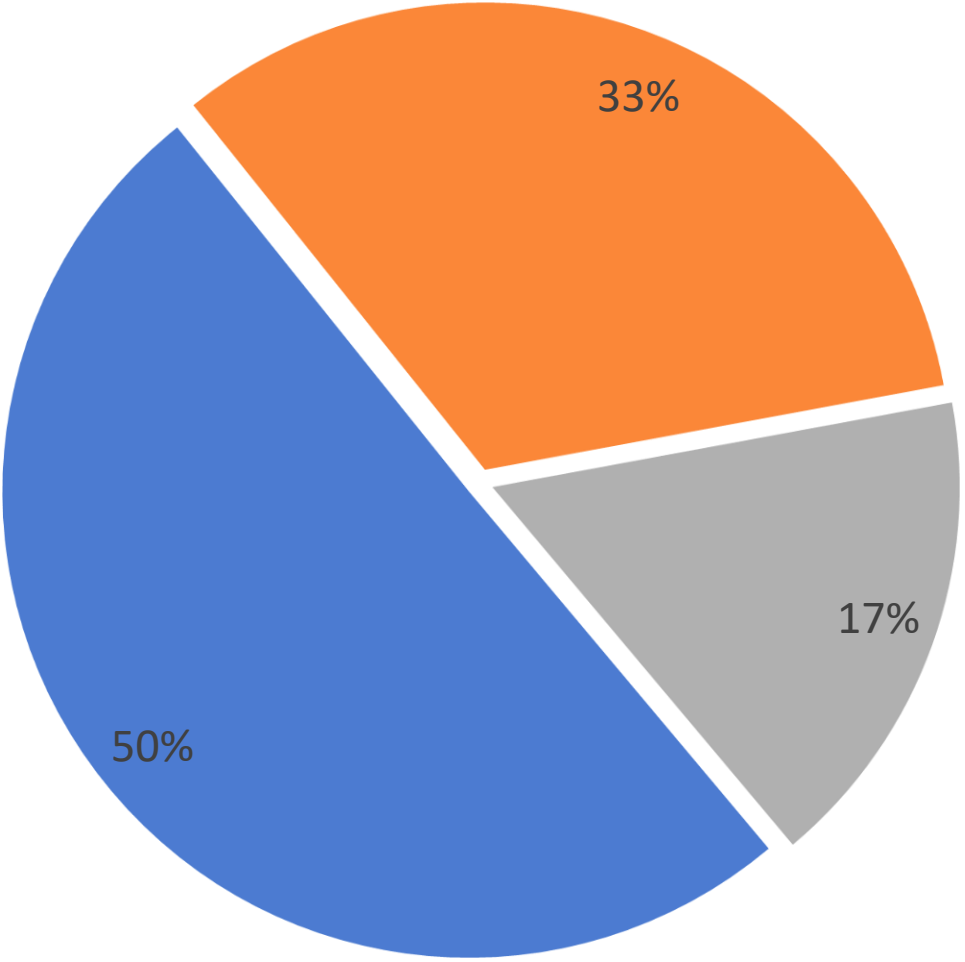


Trends

Pulse 2023 Mid-Year Data



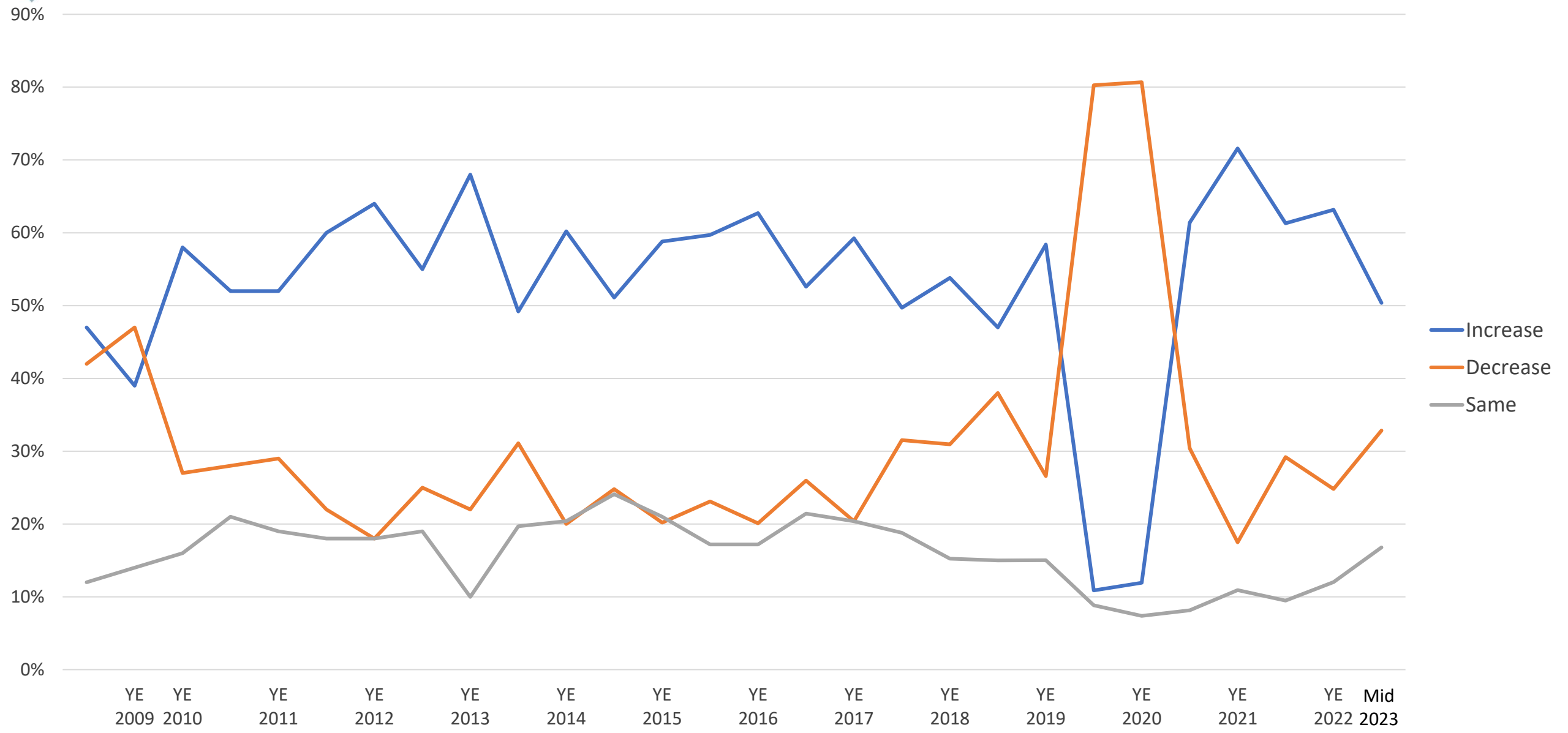
Comparing mid-year membership totals for 2023 to mid-year membership totals for 2022, your membership totals...



- Increased from the previous year
- Decreased from the previous year
- Stayed the same as the previous year

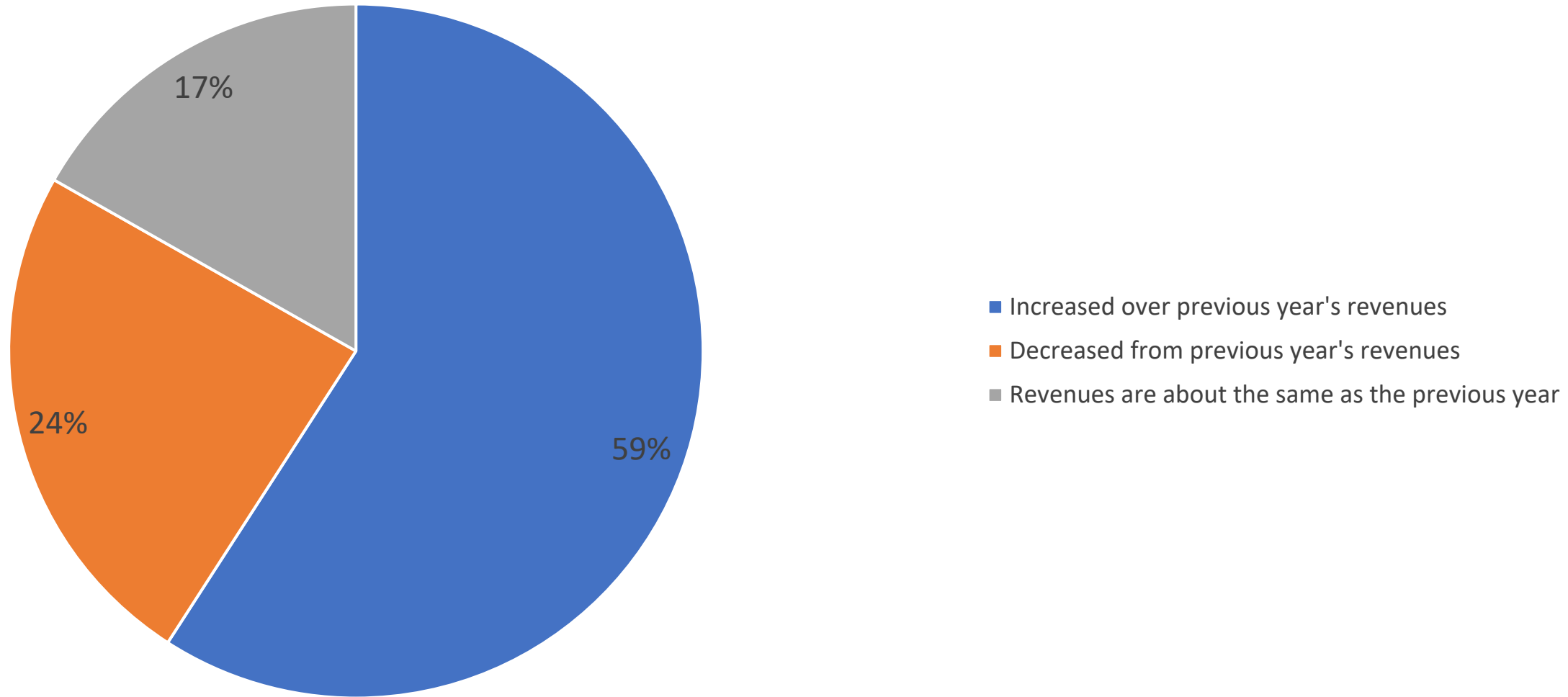


Membership Totals from Year to Year



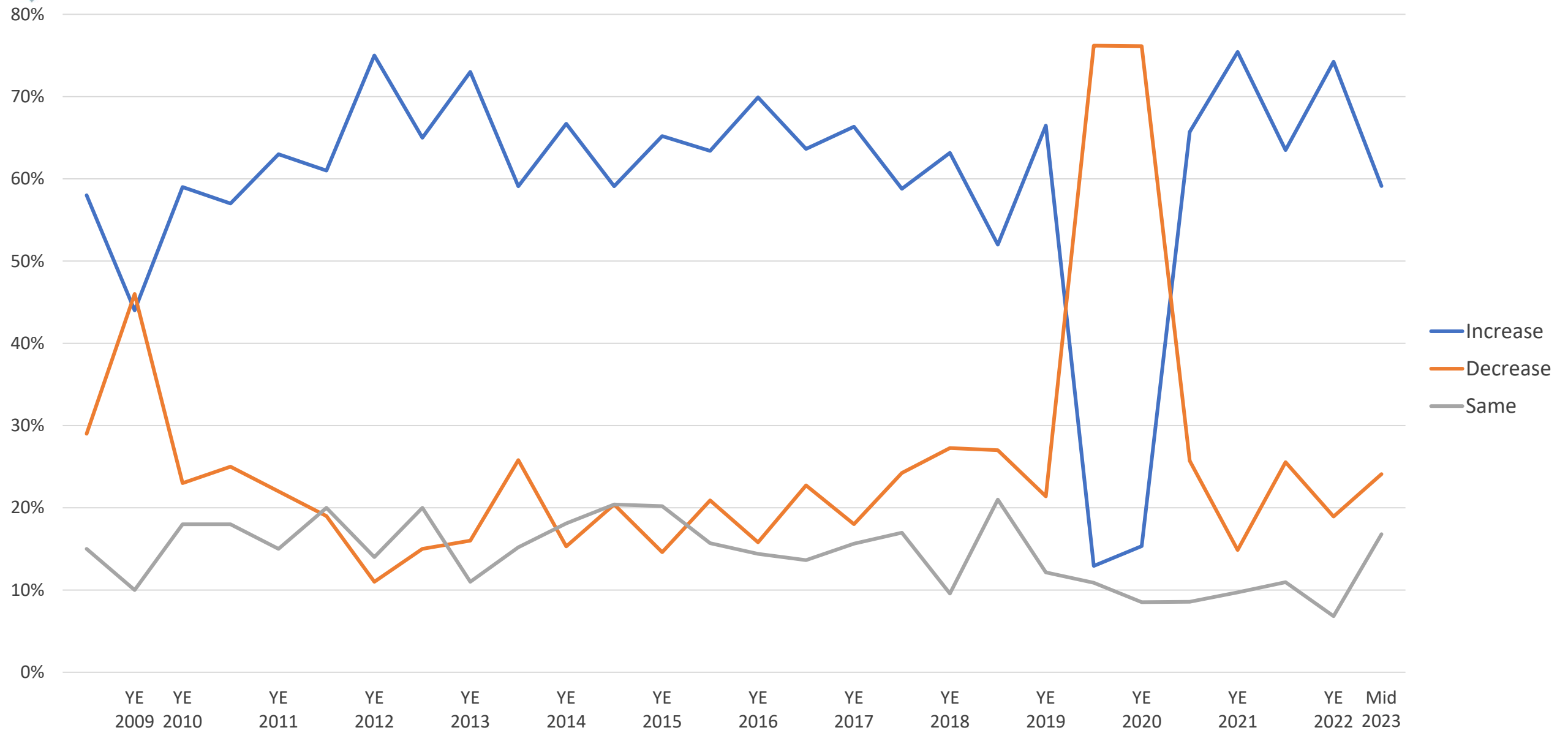


In comparing membership revenues at mid-year 2023 to membership revenues at mid-year 2022, your membership revenues...



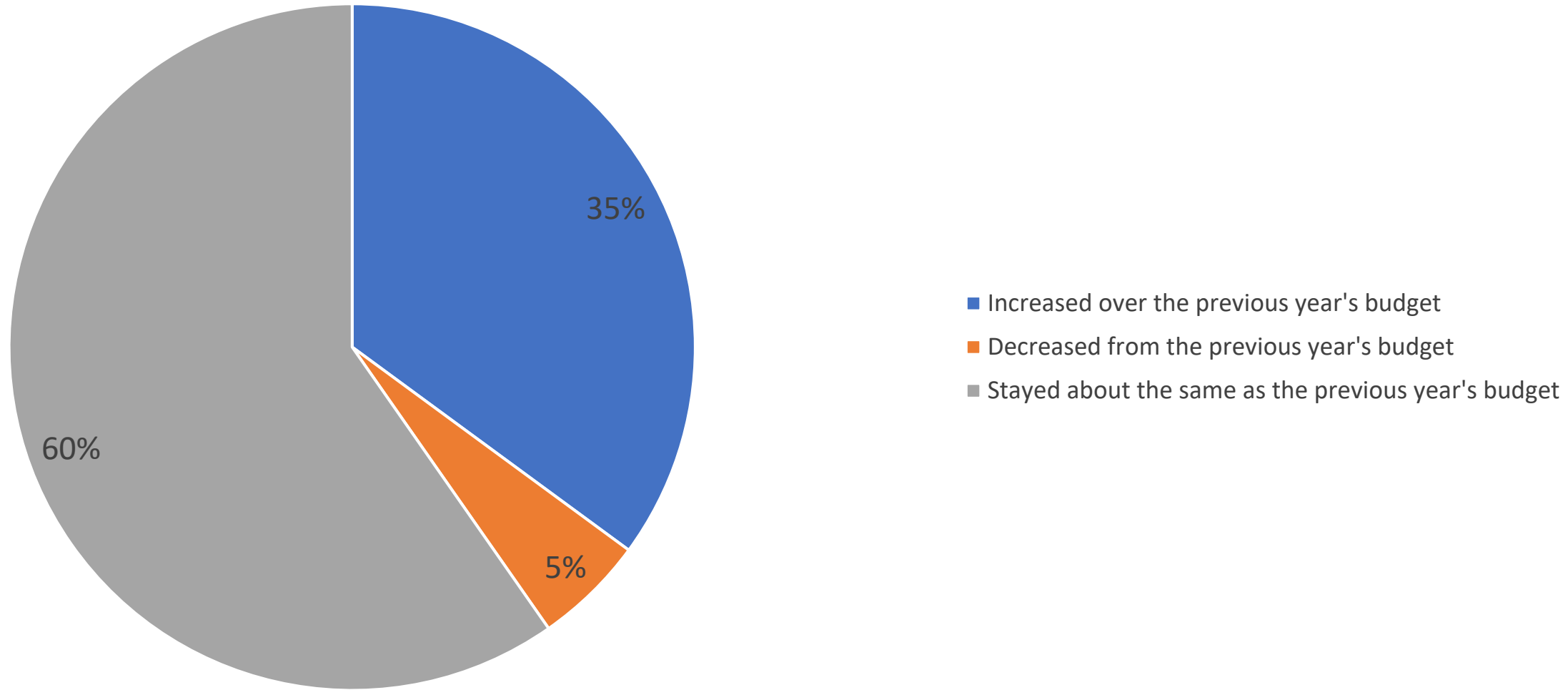


Membership Revenue



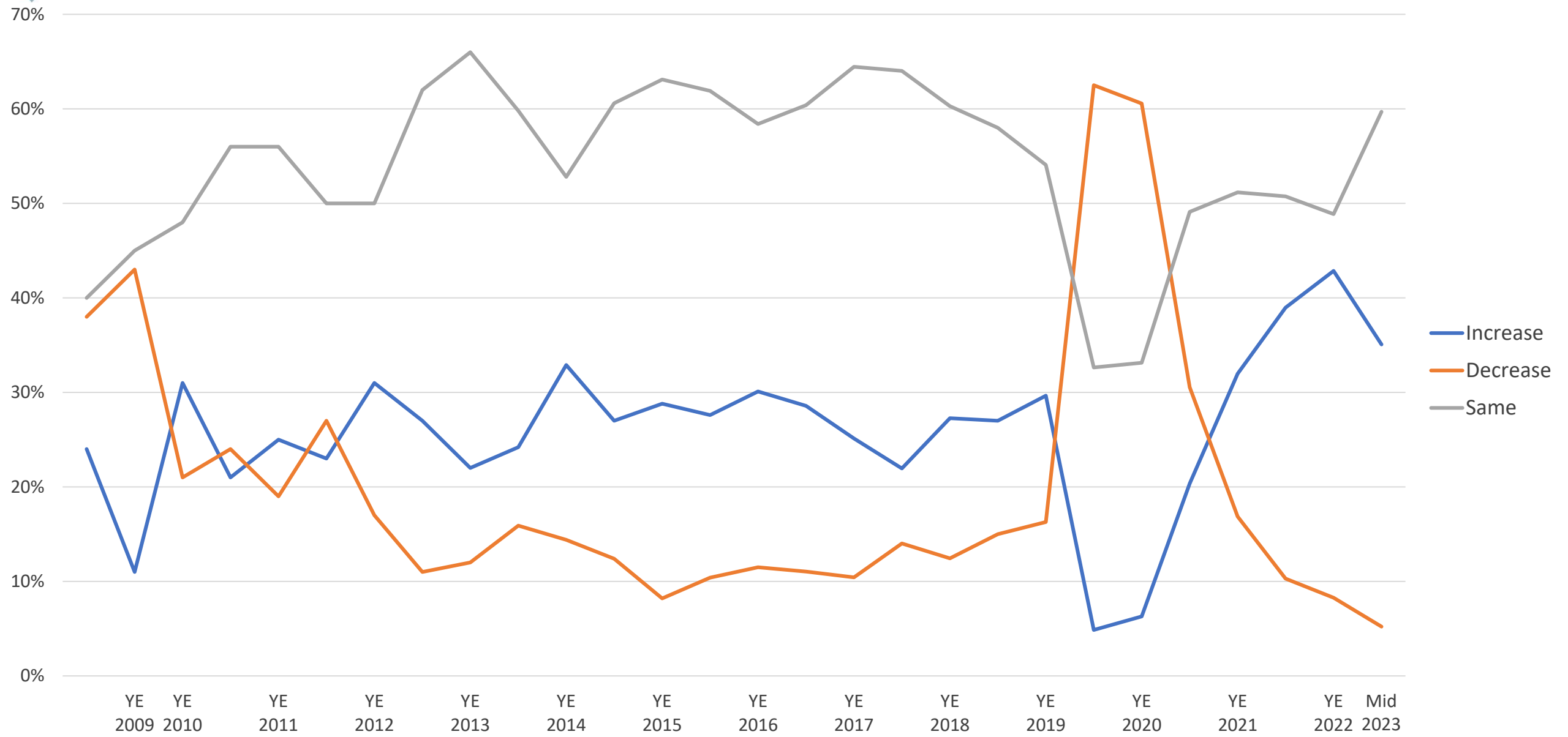


Comparing your membership expenditure budget for mid-year 2023 to your membership expenditure budget from 2022, your membership expenditure budget...



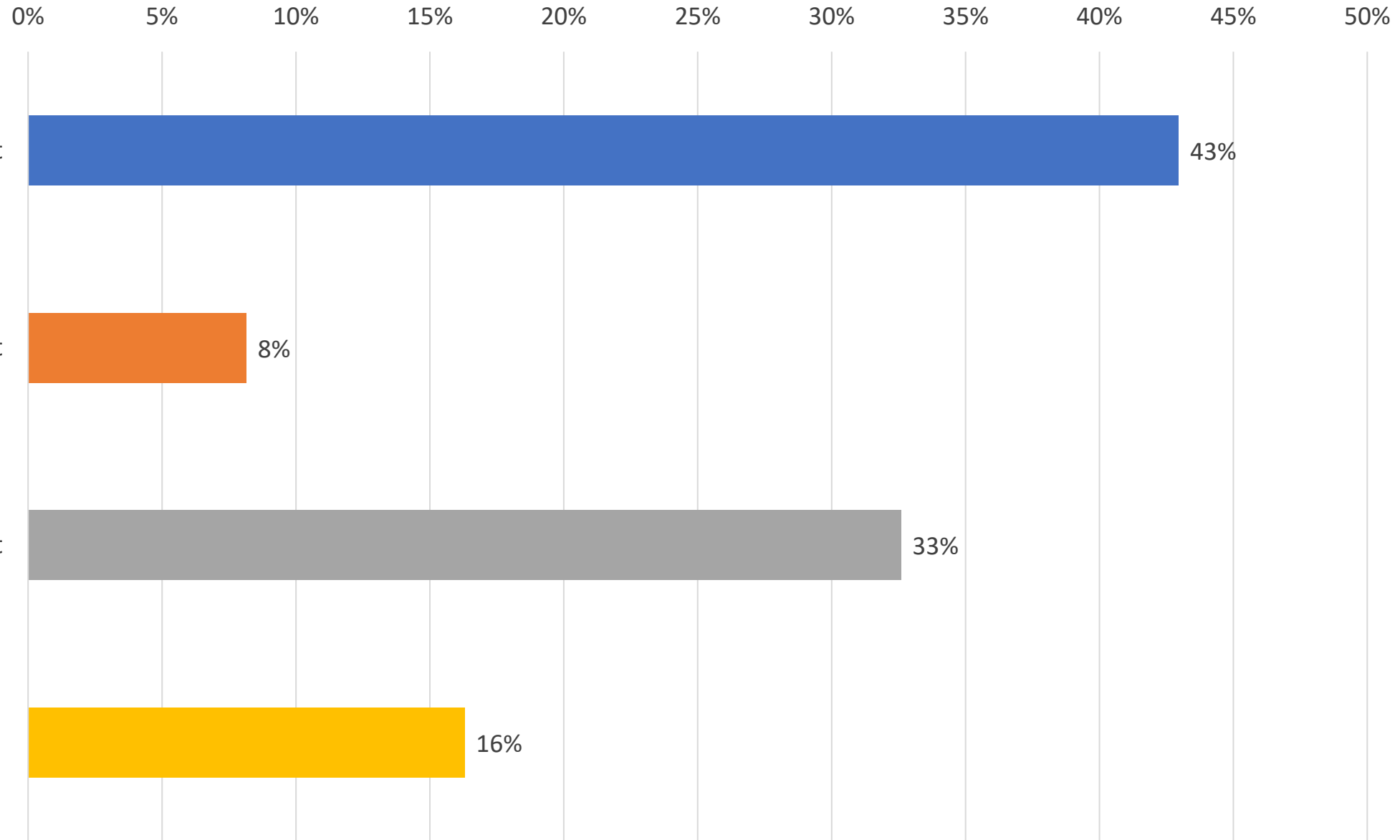


Membership Budget



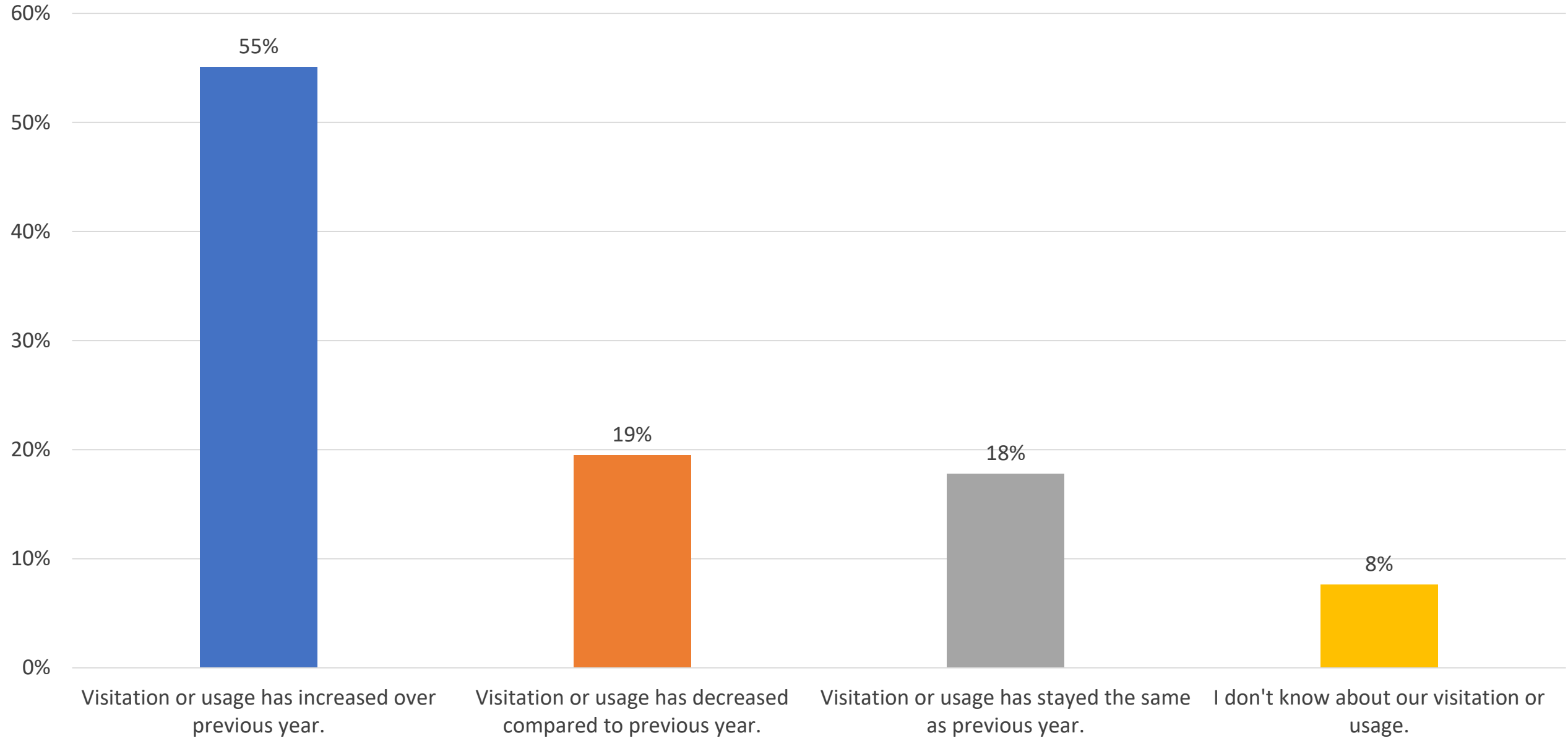


Your 2024 expenditure budget is...



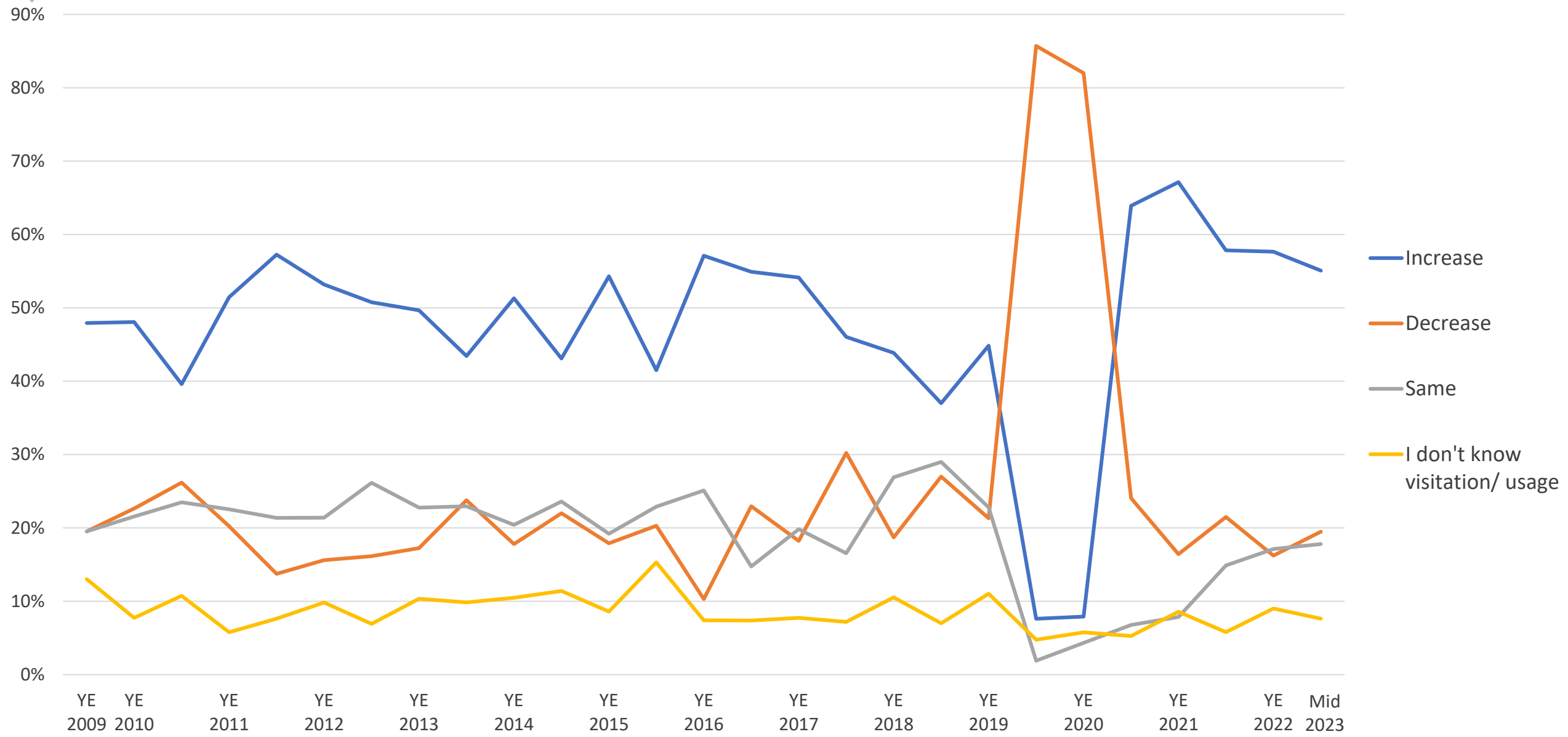


Please describe your organization's visitation or usage patterns in 2023.





Visitation or Usage





Recap

Mid-Year 2023

- Membership Totals
 - 50.4% increase
 - 18.8% stayed the same
 - 32.9% decrease
- Revenues
 - 59.1% increase
 - 16.8% stayed the same
 - 24.1% decrease
- Expenditure Budgets
 - 35.1% increase
 - 59.7% stayed the same
 - 5.2% decrease
- Visitation/Usage
 - 55.1% increase
 - 17.8% stayed the same
 - 19.5% decrease

Mid-Year 2022

- Membership Totals
 - 61.3% increase
 - 9.5% stayed the same
 - 29.2% decrease
- Revenues
 - 63.5% increase
 - 11% stayed the same
 - 25.5% decrease
- Expenditure Budgets
 - 39% increase
 - 50.7% stayed the same
 - 10.3% decrease
- Visitation/Usage
 - 57.9% increase
 - 14.9% stayed the same
 - 21.5% decrease

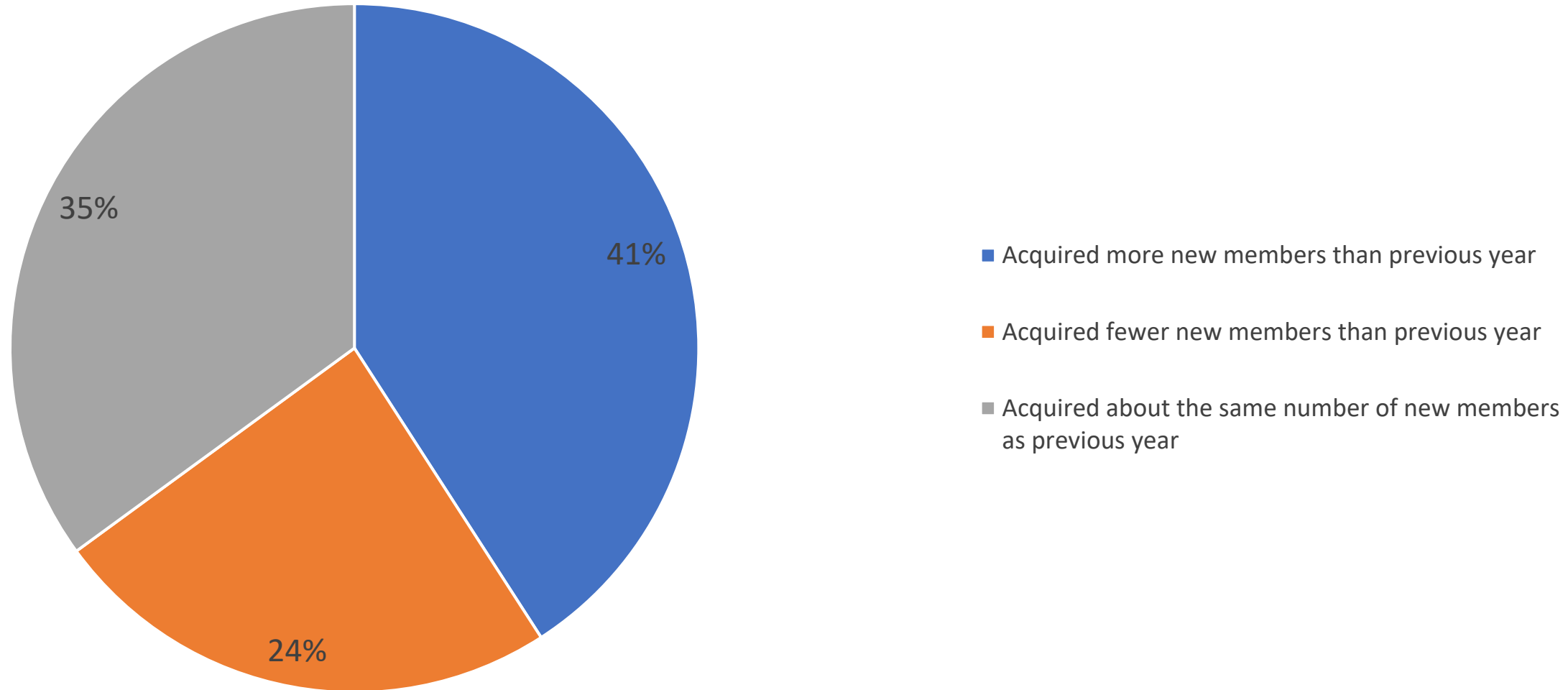


Trends – Acquisition

Pulse 2023 Mid-Year Data

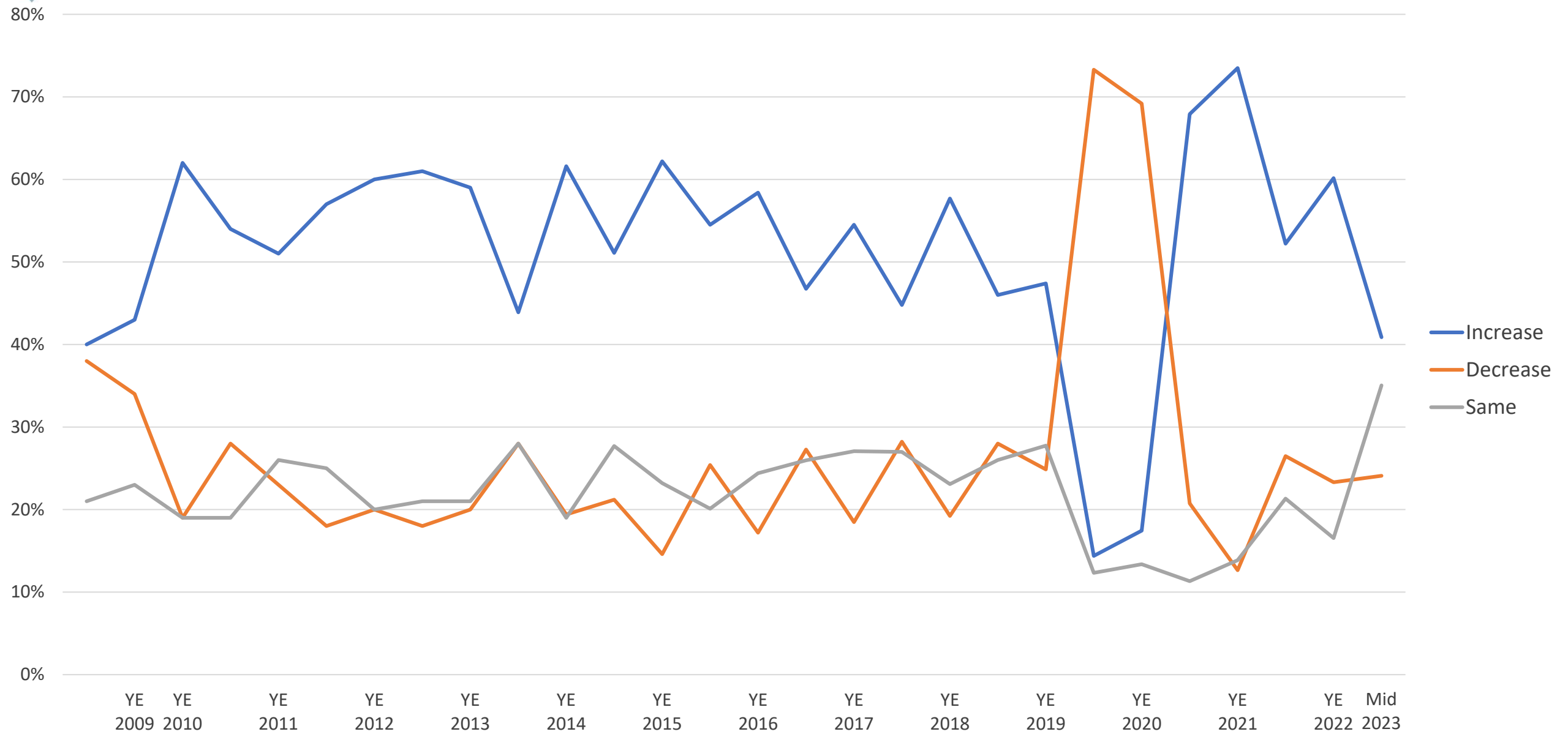


Comparing new members acquired in 2023 year-to-date to new members acquired in 2022 year-to-date, your membership acquisition efforts have...



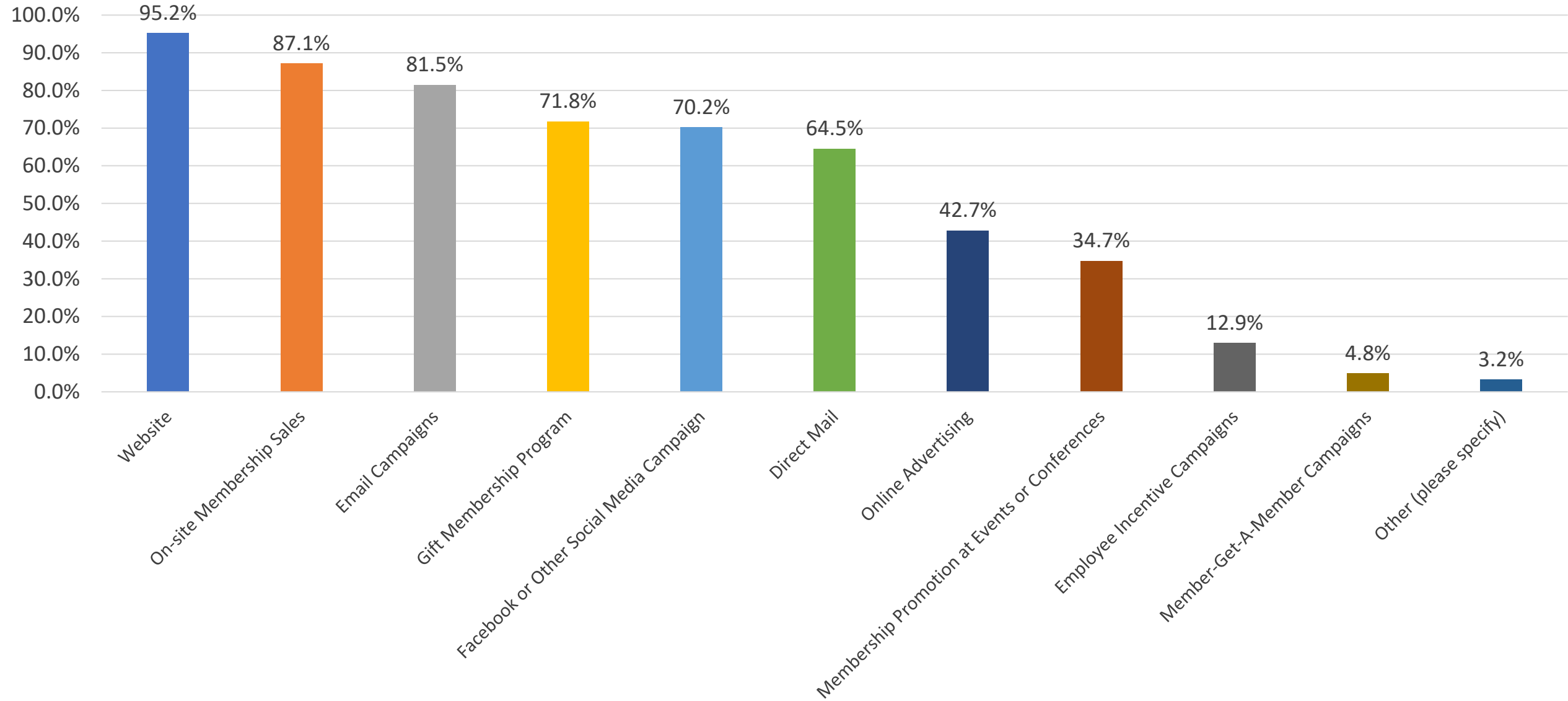


New Members Acquired



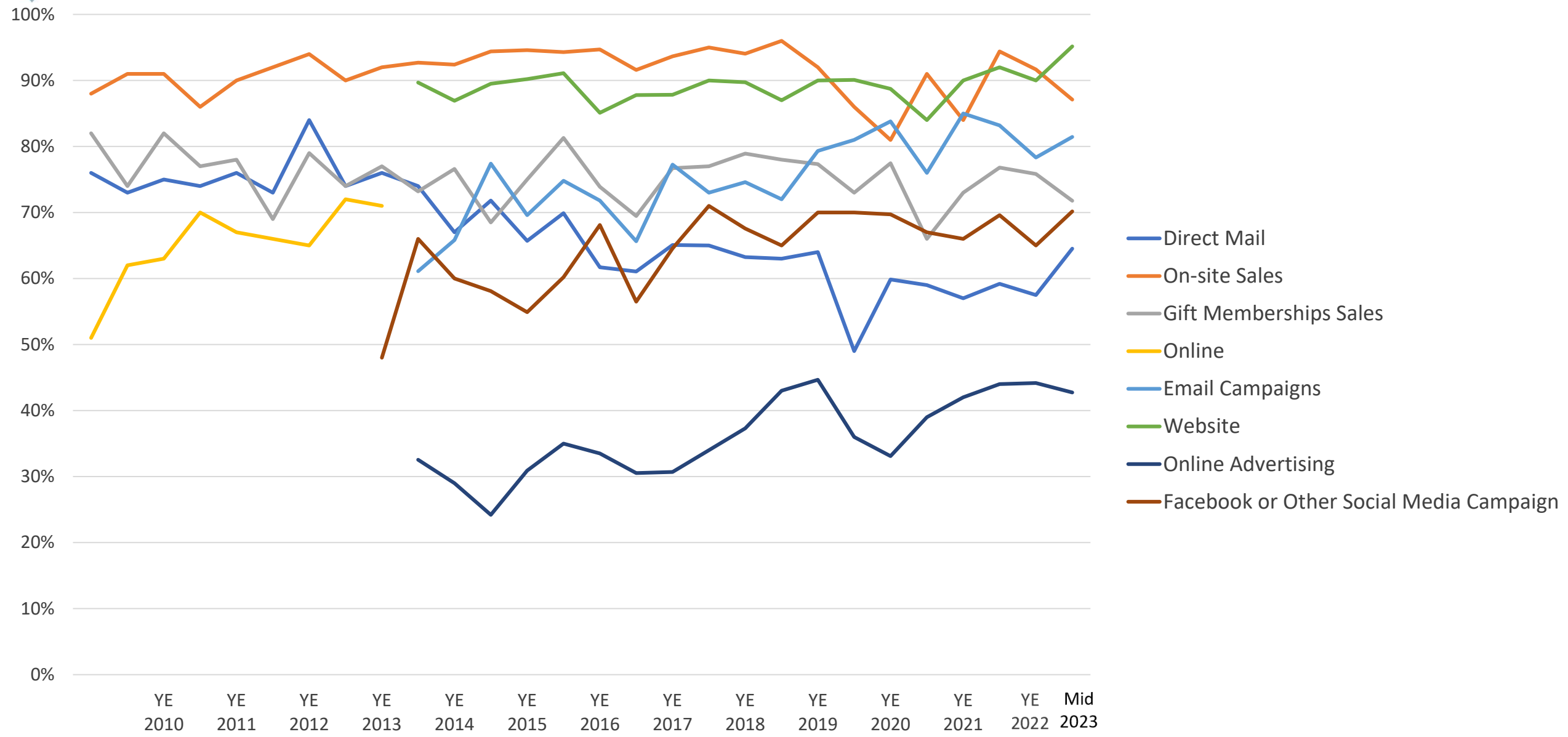


Membership Acquisition: Please select all of the means of acquiring new members that your program utilizes.





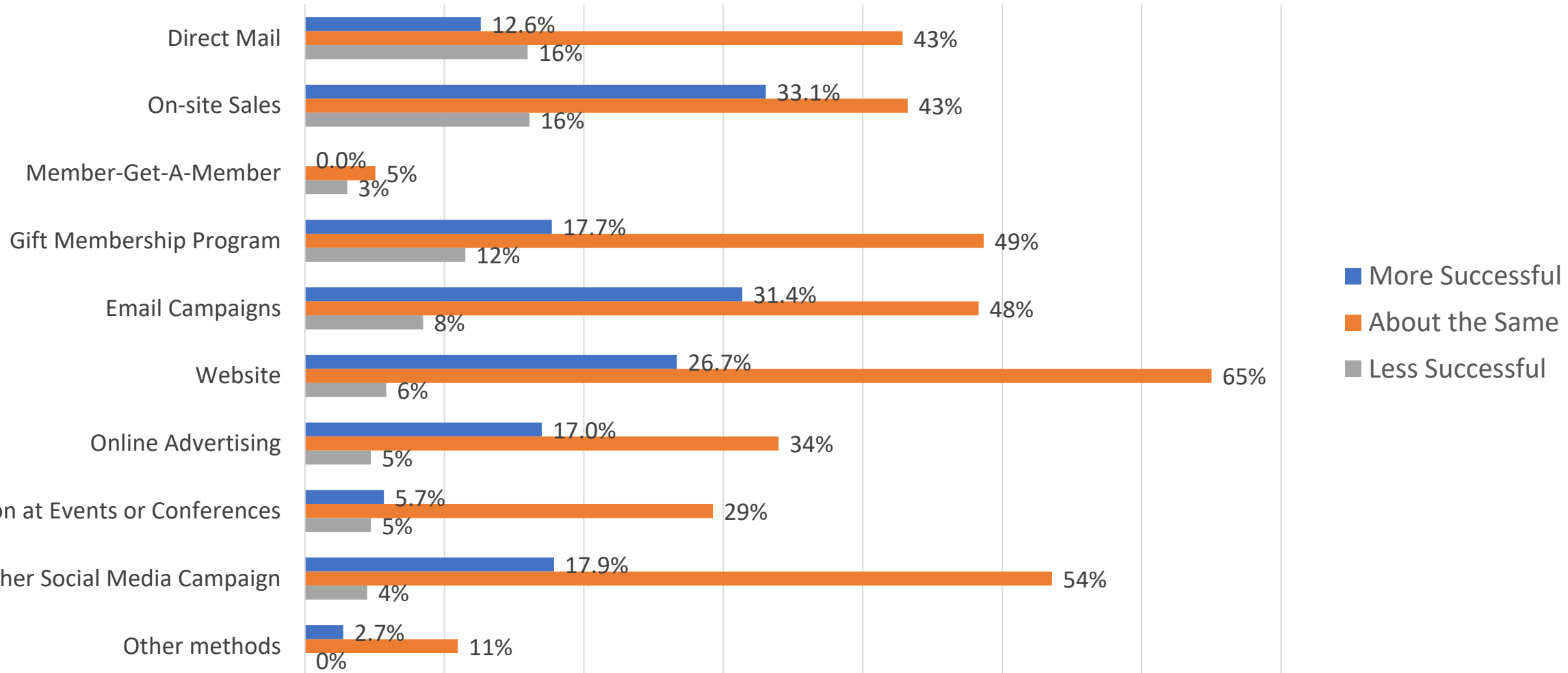
Acquisition Sources Used





Please rate each source of member acquisition that you used in 2023 and the previous year, and indicate if your results were more successful than the previous year, less successful than the previous year, or about the same as the previous year.

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0%





Recap – Acquisition Methods

Mid-Year 2023

- New Members
 - 40.9% increase
 - 24.1% said decrease
 - 35.0% staying the same
- Top 5 Acquisition Methods
 1. Website
 2. On-site Membership Sales
 3. Email Campaigns
 4. Gift Membership Program
 5. Facebook or Other Social Media Campaign

Mid-Year 2022

- New Members
 - 52% increase
 - 27% said decrease
 - 21% staying the same
- Top 5 Acquisition Methods
 1. On-site Membership Sales
 2. Website
 3. Email Campaigns
 4. Gift Membership Program
 5. Facebook or Other Social Media Campaign

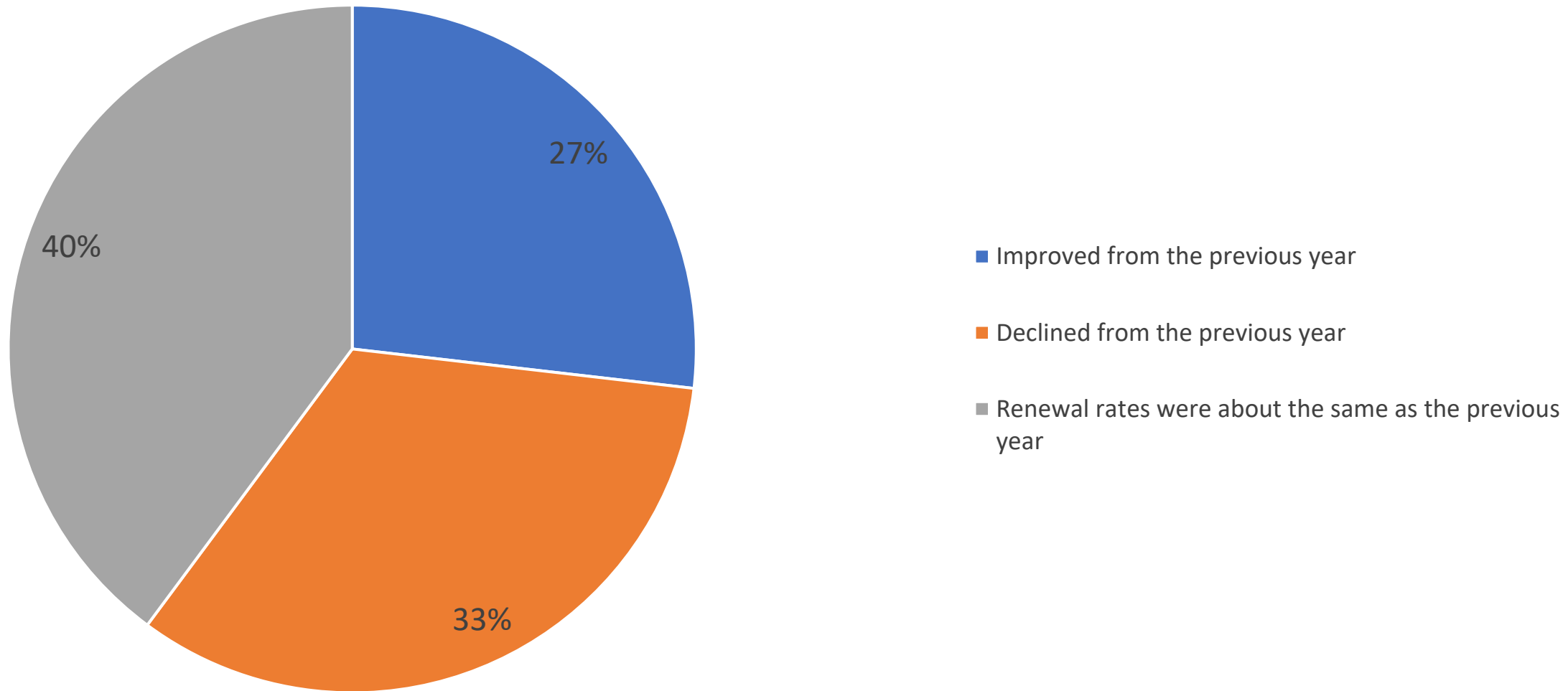


Trends – Renewals

Pulse 2023 Mid-Year Data

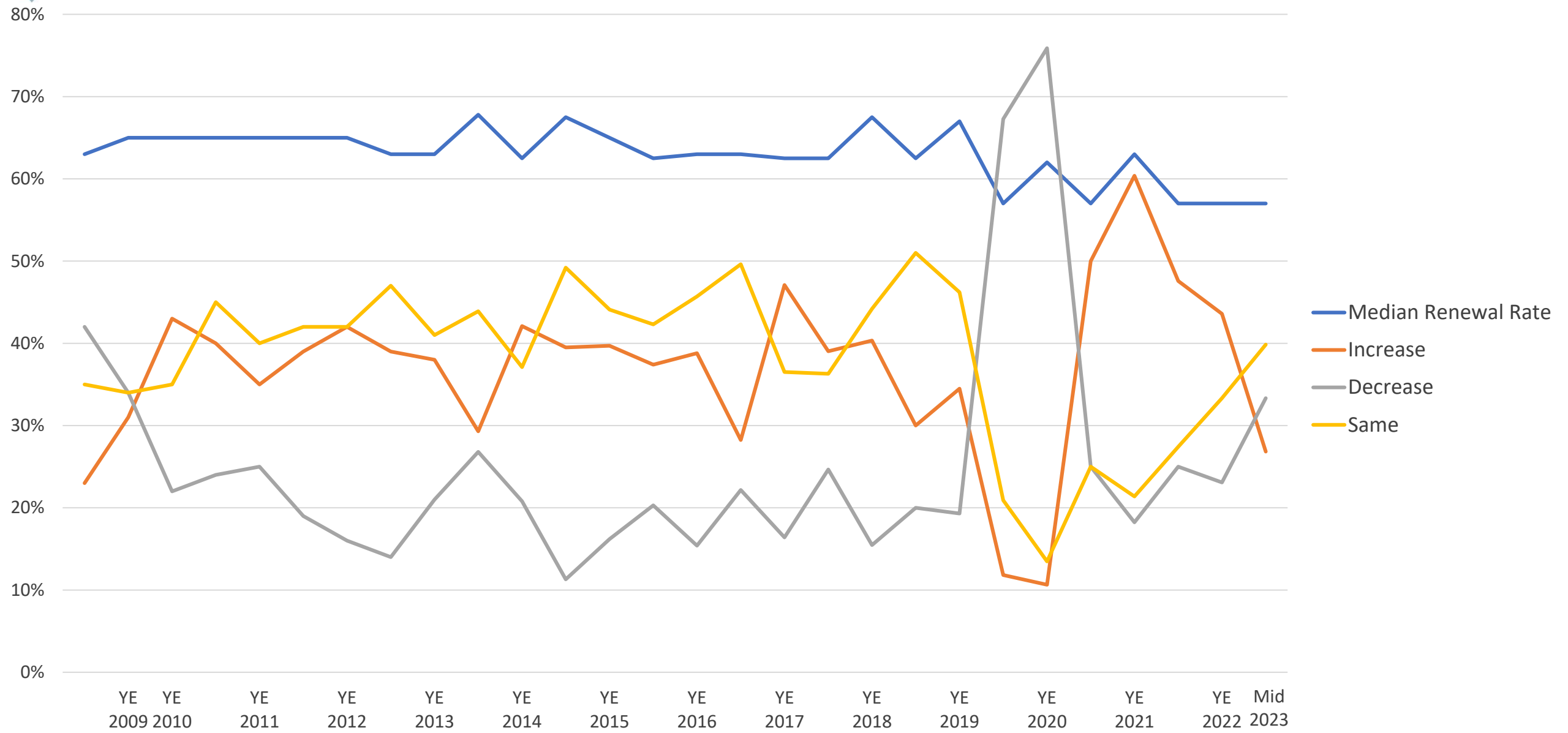


Comparing membership renewal rates in 2023 compared to those in 2022, would you say that renewal rates...





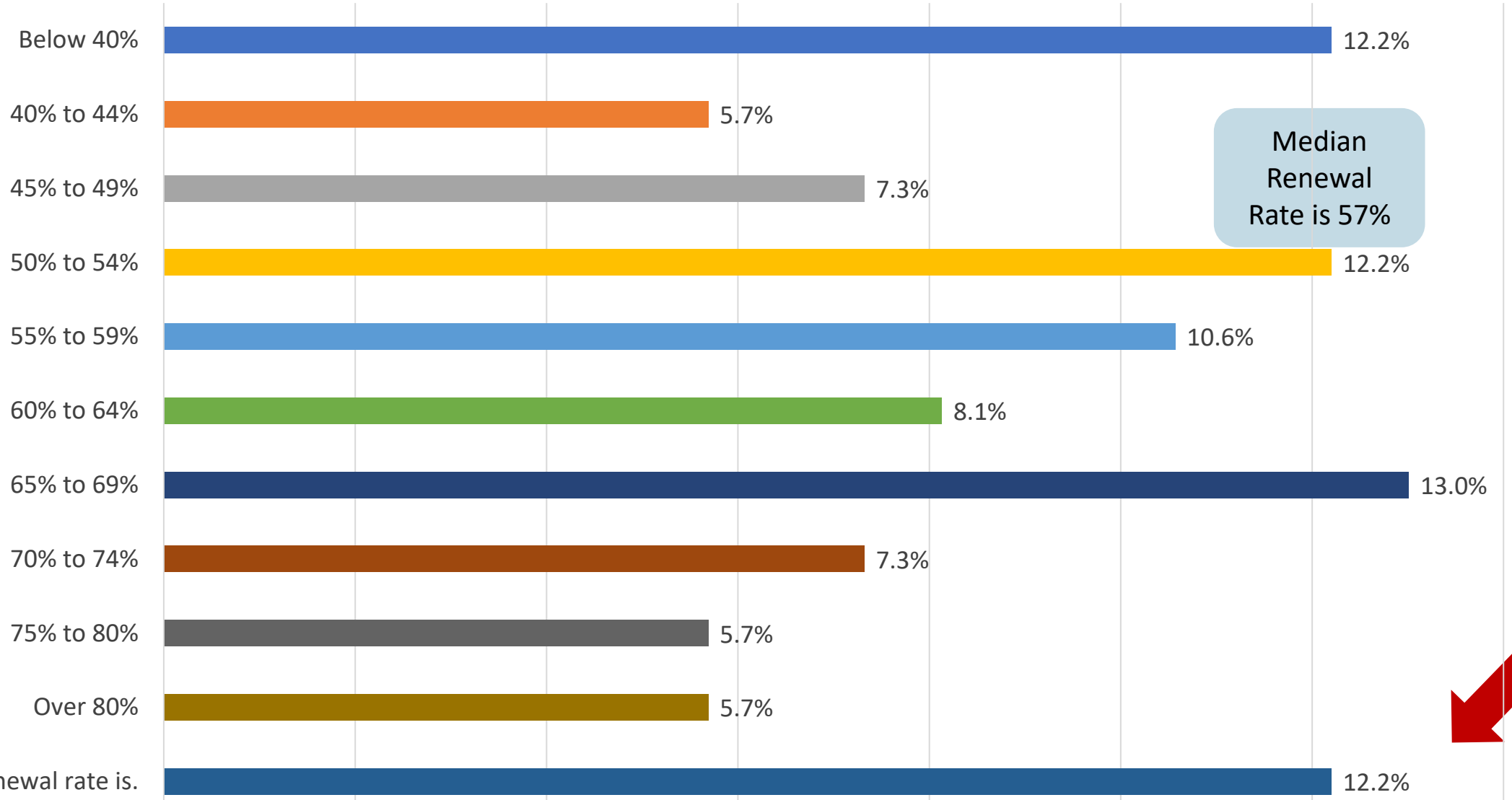
Renewal Rates





What is your membership renewal rate?

0.0% 2.0% 4.0% 6.0% 8.0% 10.0% 12.0% 14.0%

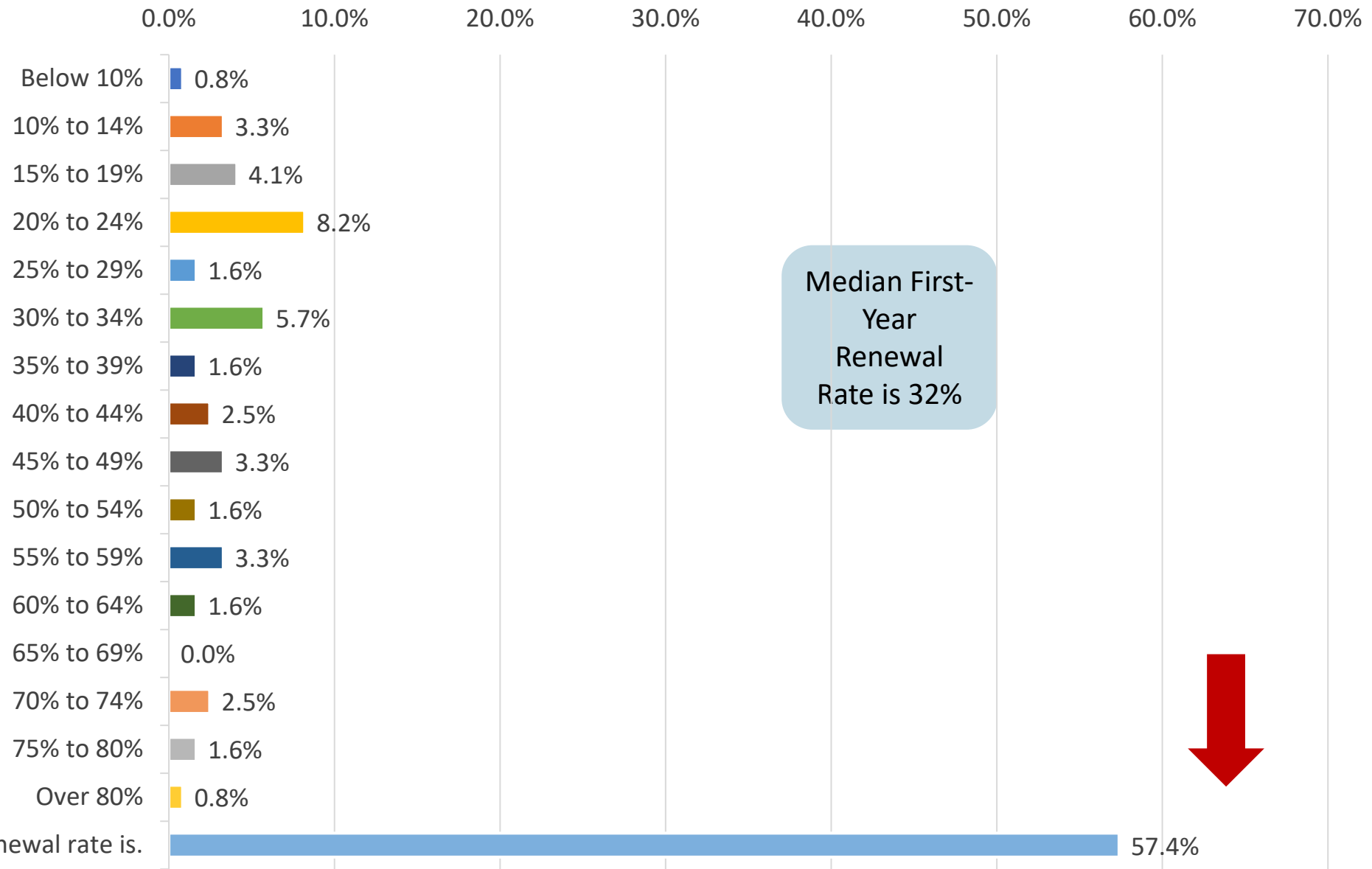


Median
Renewal
Rate is 5.7%





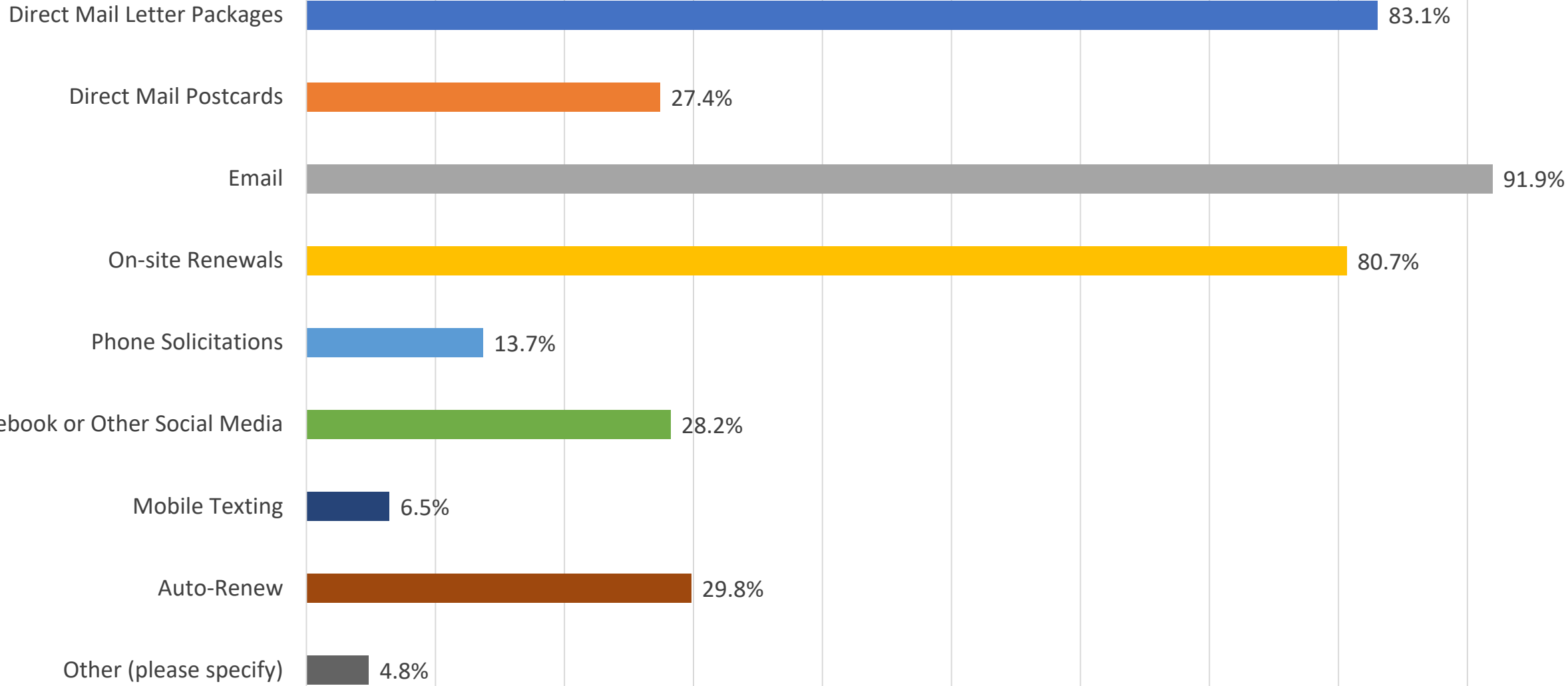
What is your first-year member renewal rate?





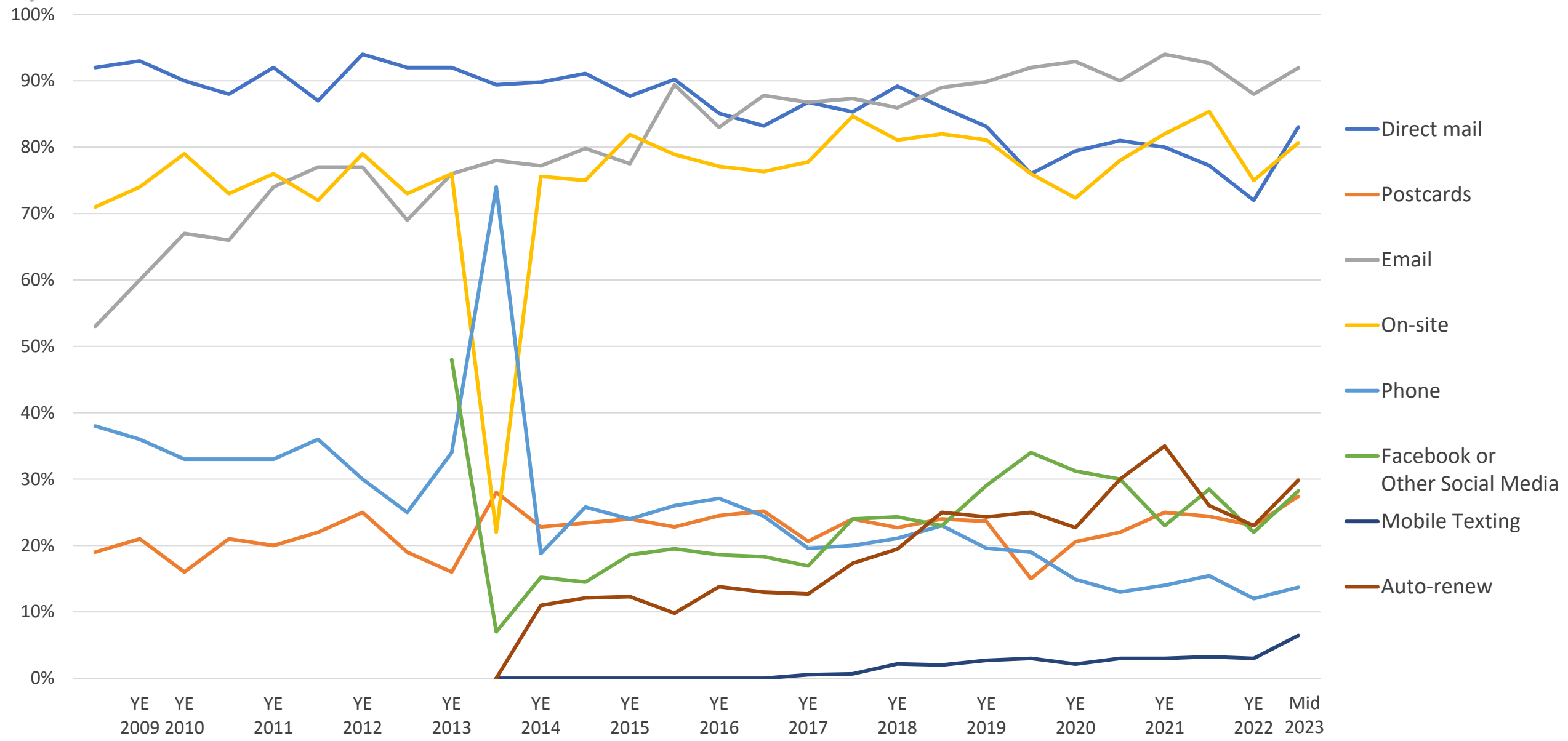
Please indicate the methods your program utilizes to drive membership renewals.

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0% 90.0% 100.0%



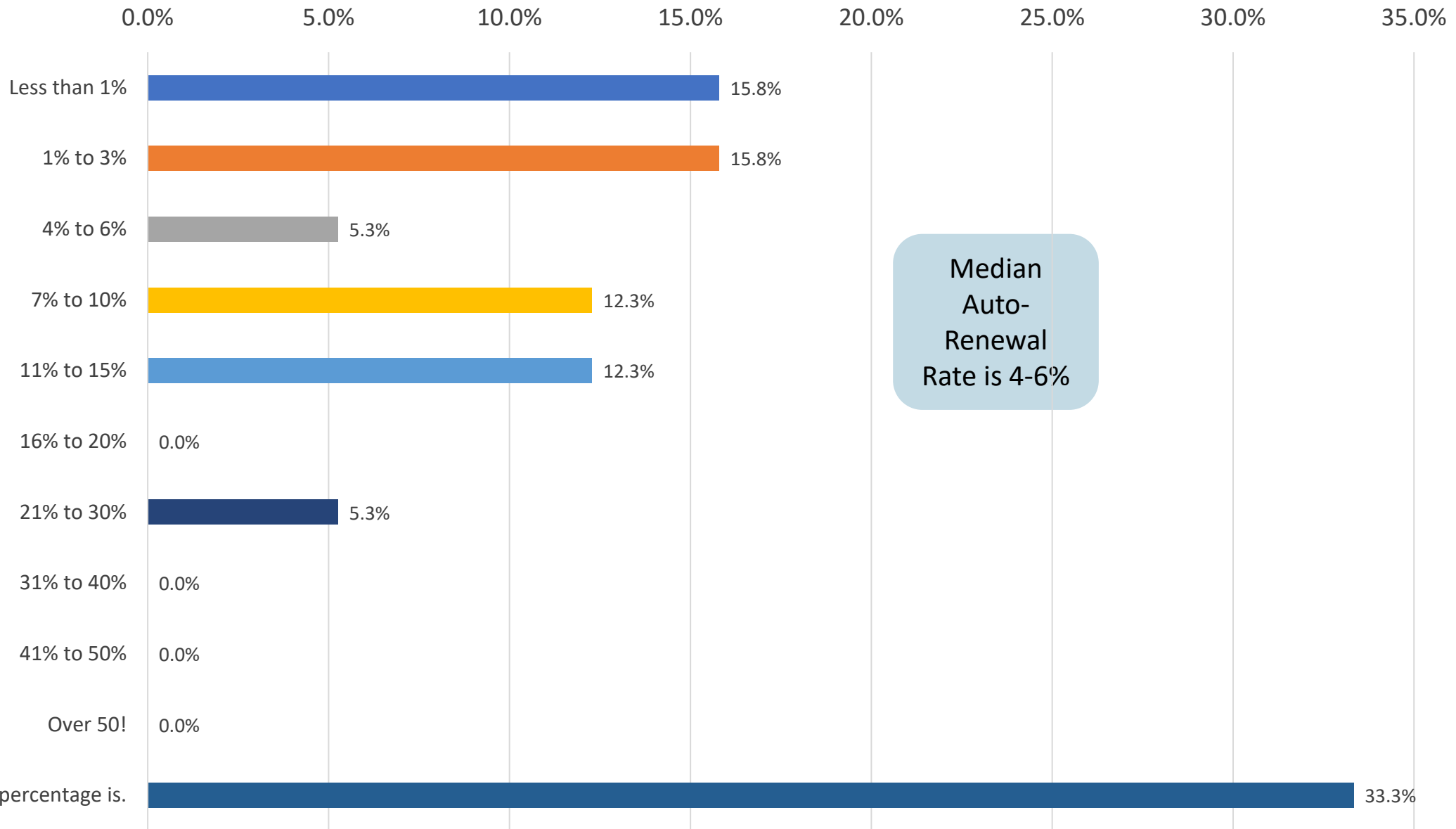


Methods Utilized to Drive Membership Renewals





If you offer an auto-renew option, what percentage of members have selected this option?





Recap – Renewals

Mid-Year 2023

- Renewal Rates
 - 26.8% increase
 - 33.3% decrease
 - 39.8% staying the same
- Median Renewal Rate = 57%
 - 12.2% DO NOT KNOW Renewal Rate
- Median First-Year Renewal Rate = 32%
- Top 3 Renewal Methods
 1. Email
 2. Direct Mail letter packages
 3. On-Site Renewals

Auto-Renewal is on the rise as a renewal method with 29.8% utilizing now.

Mid-Year 2022

- Renewal Rates
 - 60% increase
 - 18% decrease
 - 21% staying the same
- Median Renewal Rate = 63%
 - 12.6% DO NOT KNOW Renewal Rate
- Median First-Year Renewal Rate = 37%
- Top 3 Renewal Methods
 1. Email
 2. On-Site Renewals
 3. Direct Mail letter packages

Auto-Renewal is on the rise as a renewal method with 26% utilizing now, but less than reported a year ago

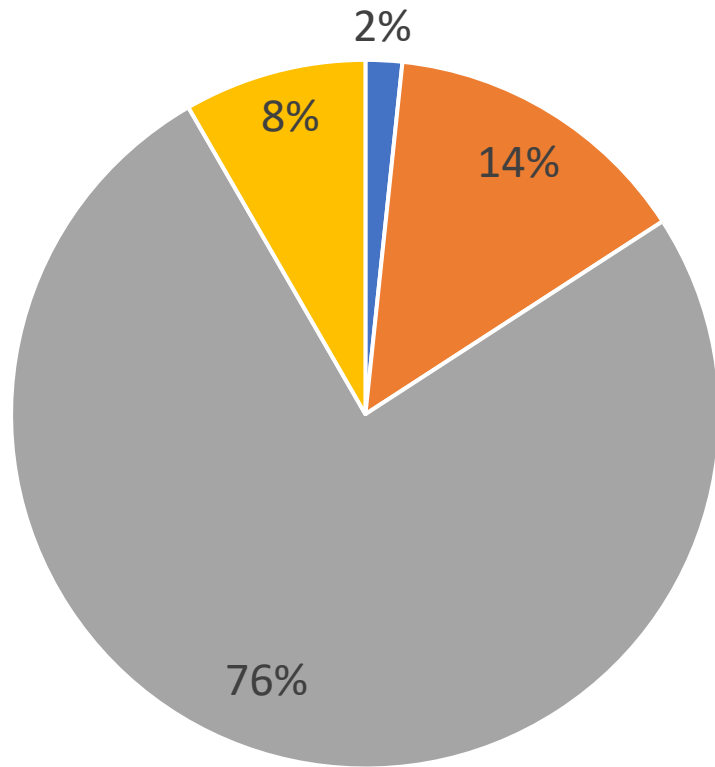


Digital, Online, Social Media and Mobile Marketing

Pulse 2023 Mid-Year Data

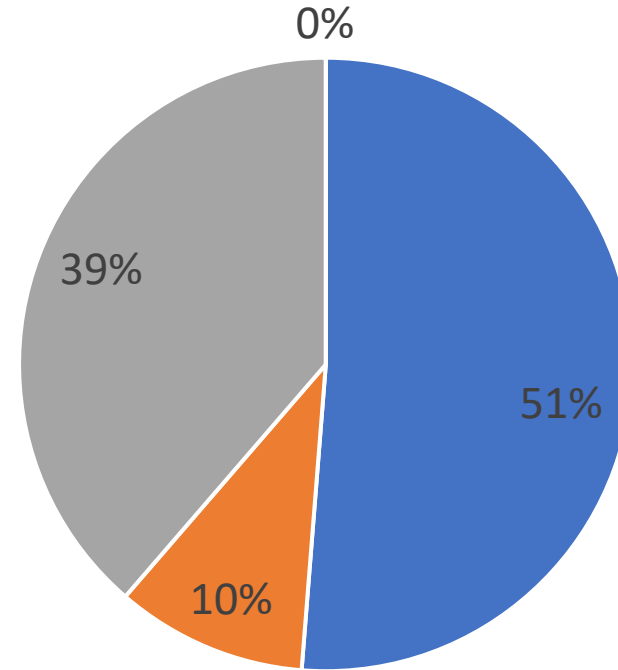


Who manages social media at your organization?



- I manage social media.
- Someone in my department manages social media.
- Someone in another department manages social media.
- Multiple people across departments manage social media.

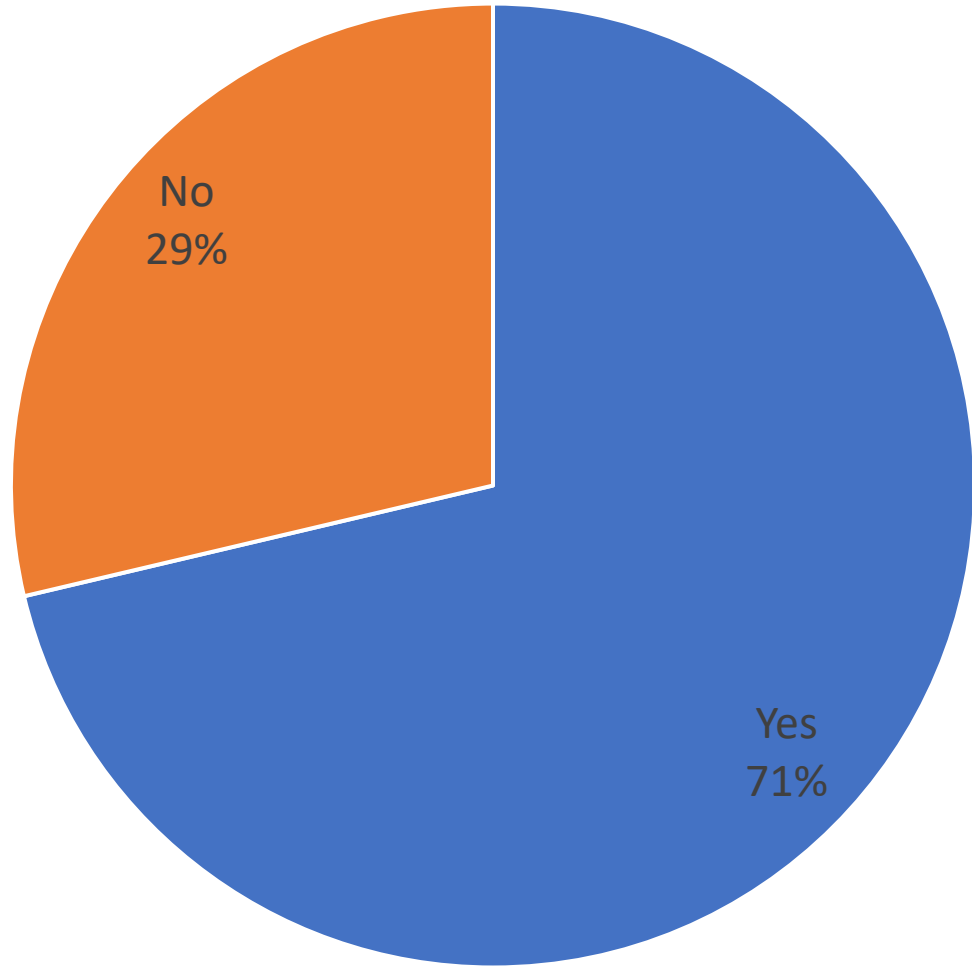
The person at my organization who manages social media is ...



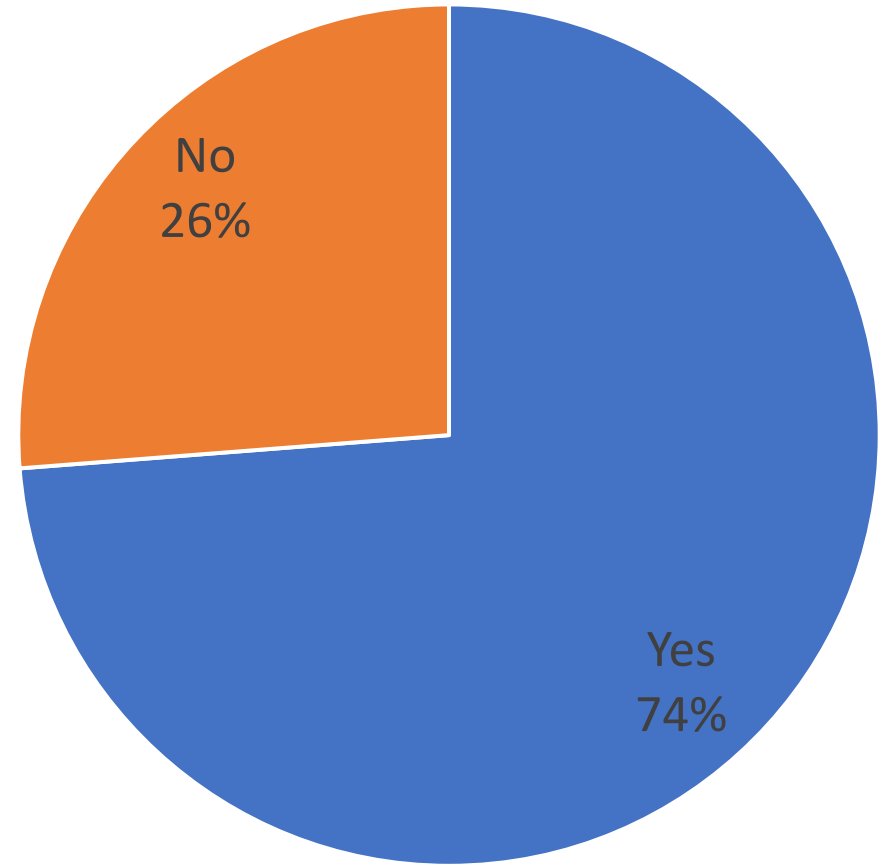
- A full-time social media position.
- A part-time social media position.
- Social media is an "add on" to someone's existing job.
- I don't know the status of social media management.



Does Membership have a voice in your organization's social media strategy?

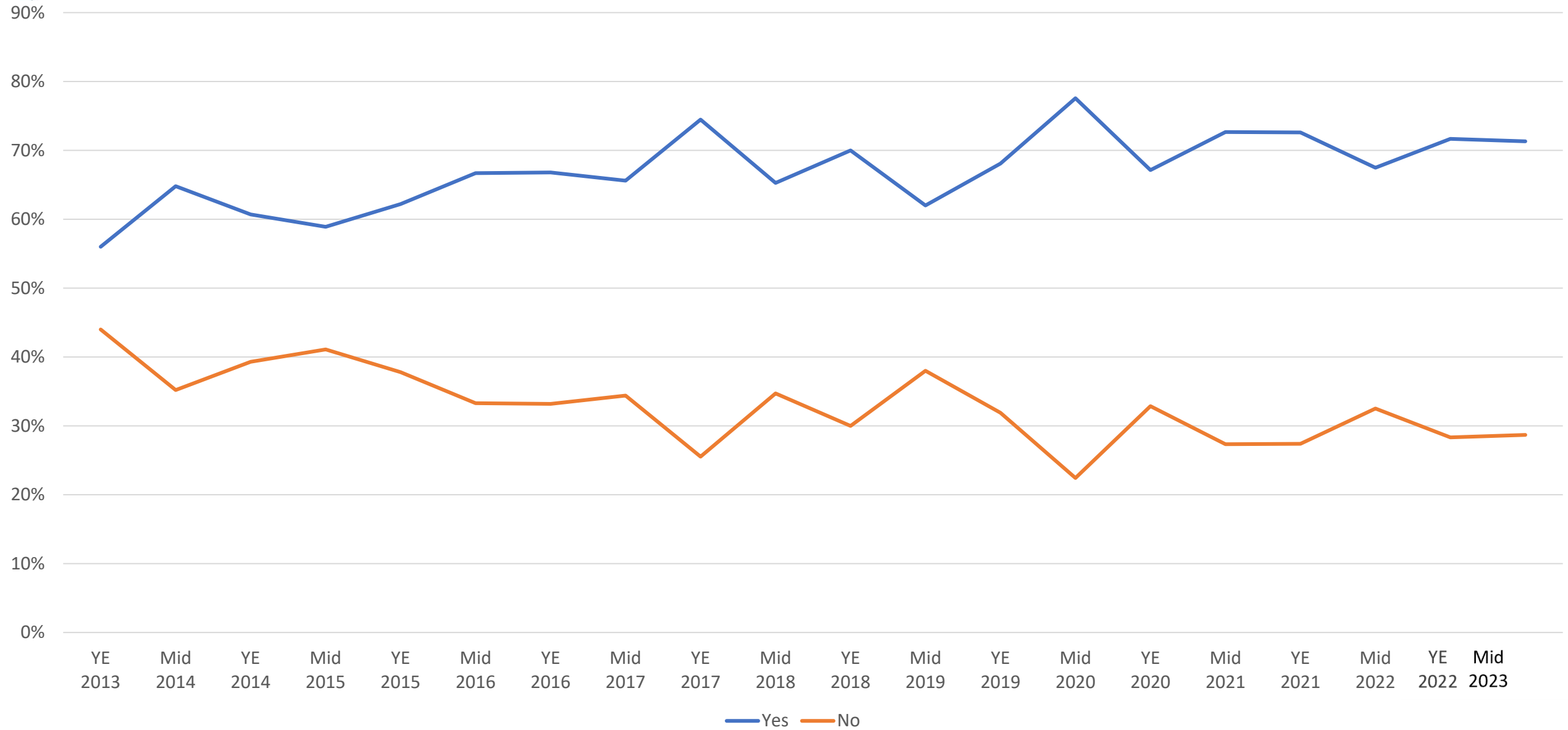


Does Membership have a voice in your organization's social media content management (e.g., membership messages, promotions, contests)?





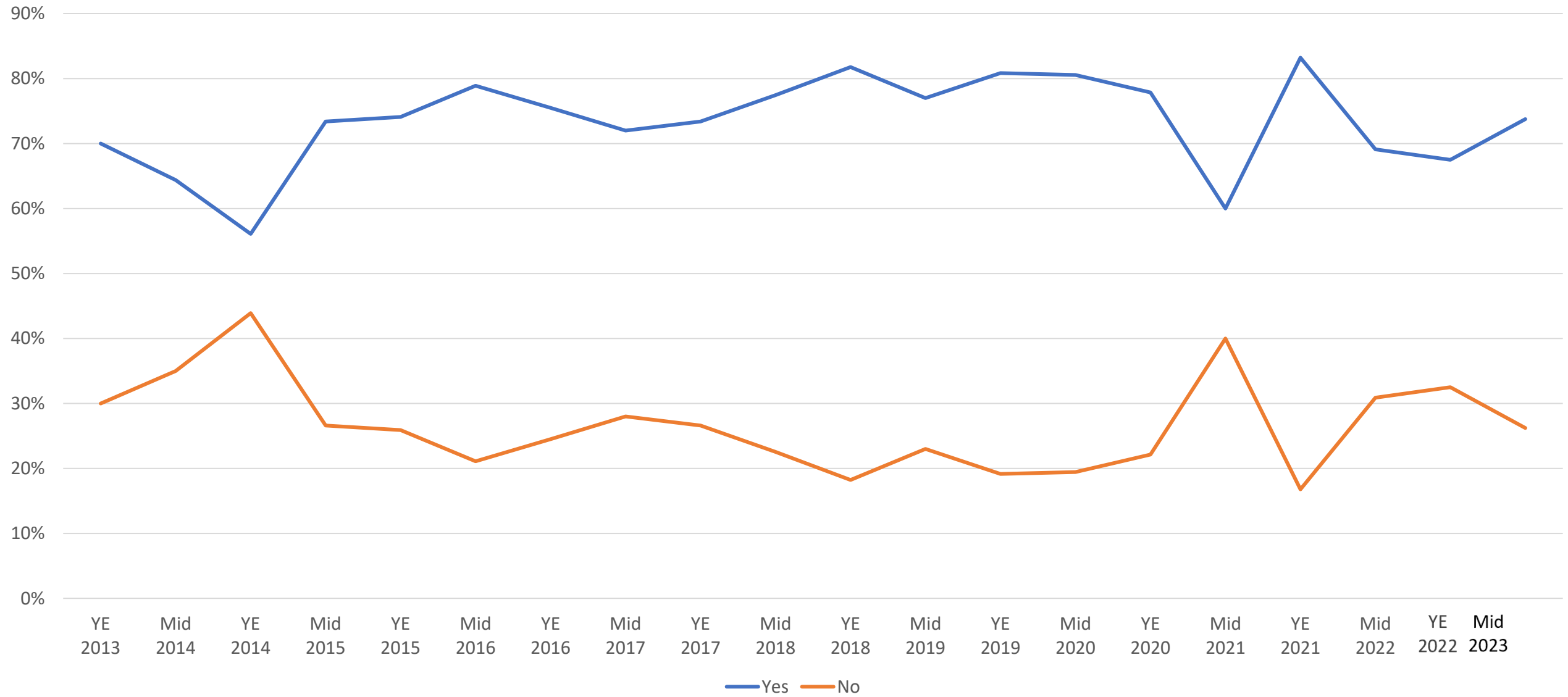
Does Membership have a voice in your organization's social media strategy?



— Yes — No

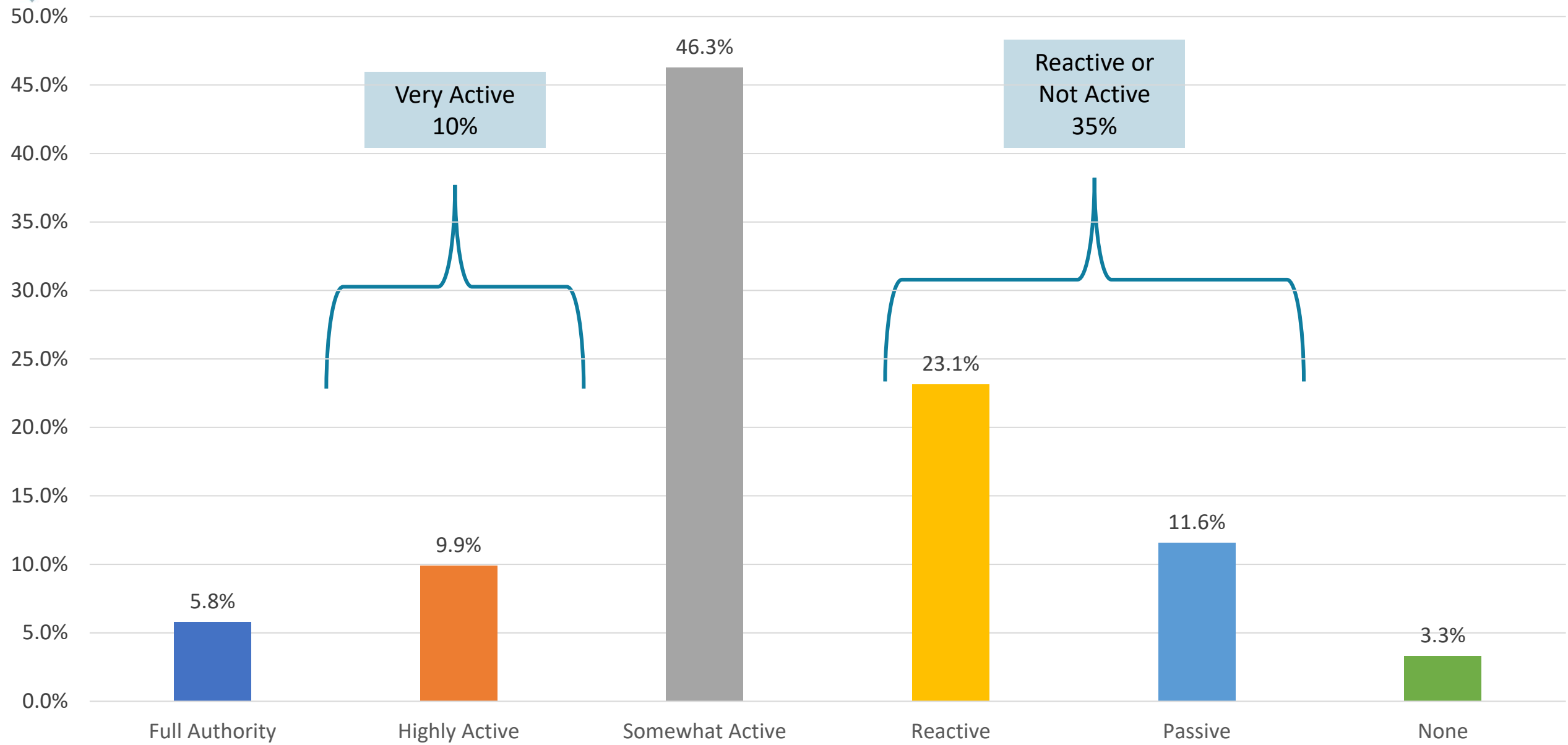


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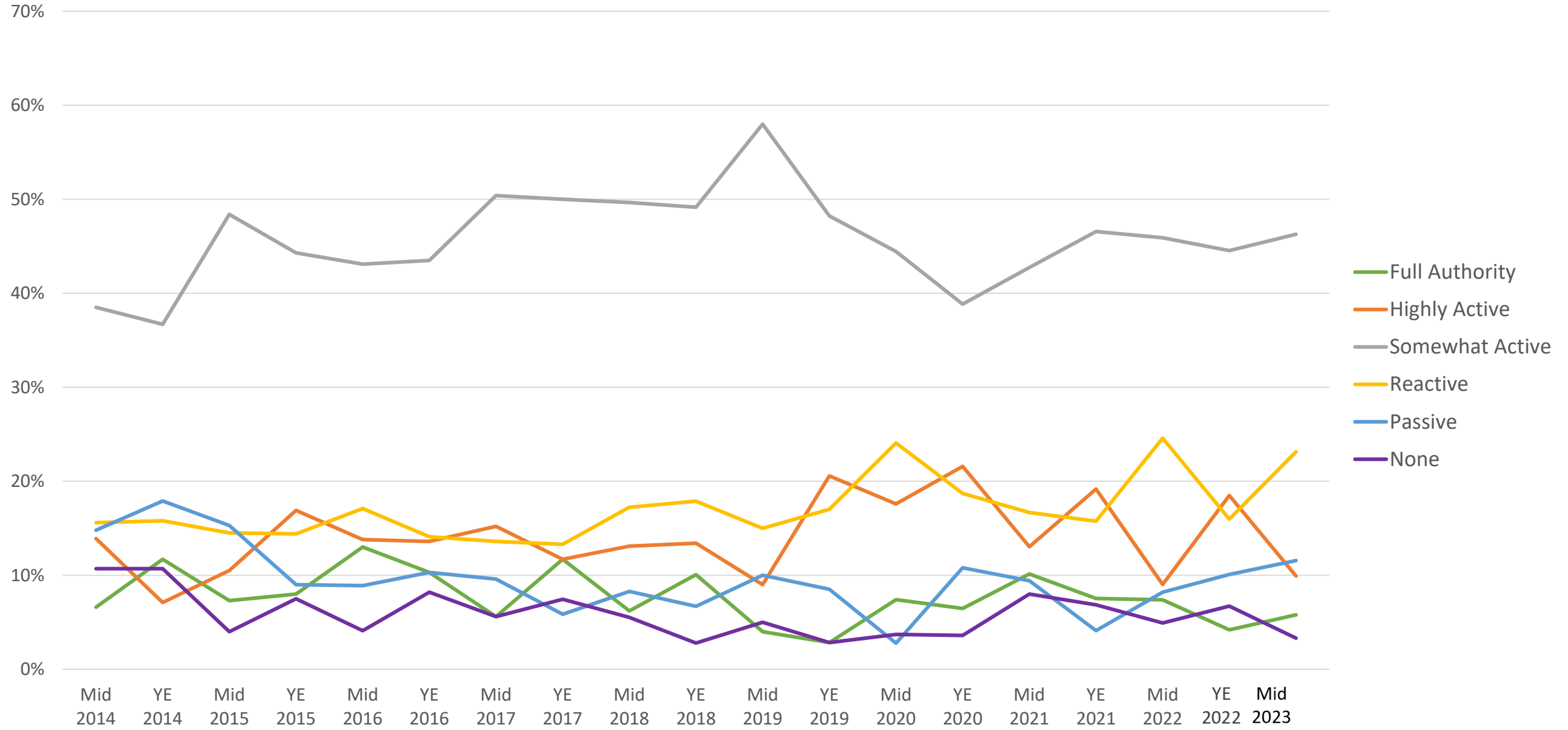


What type of role does membership have in social media content management?





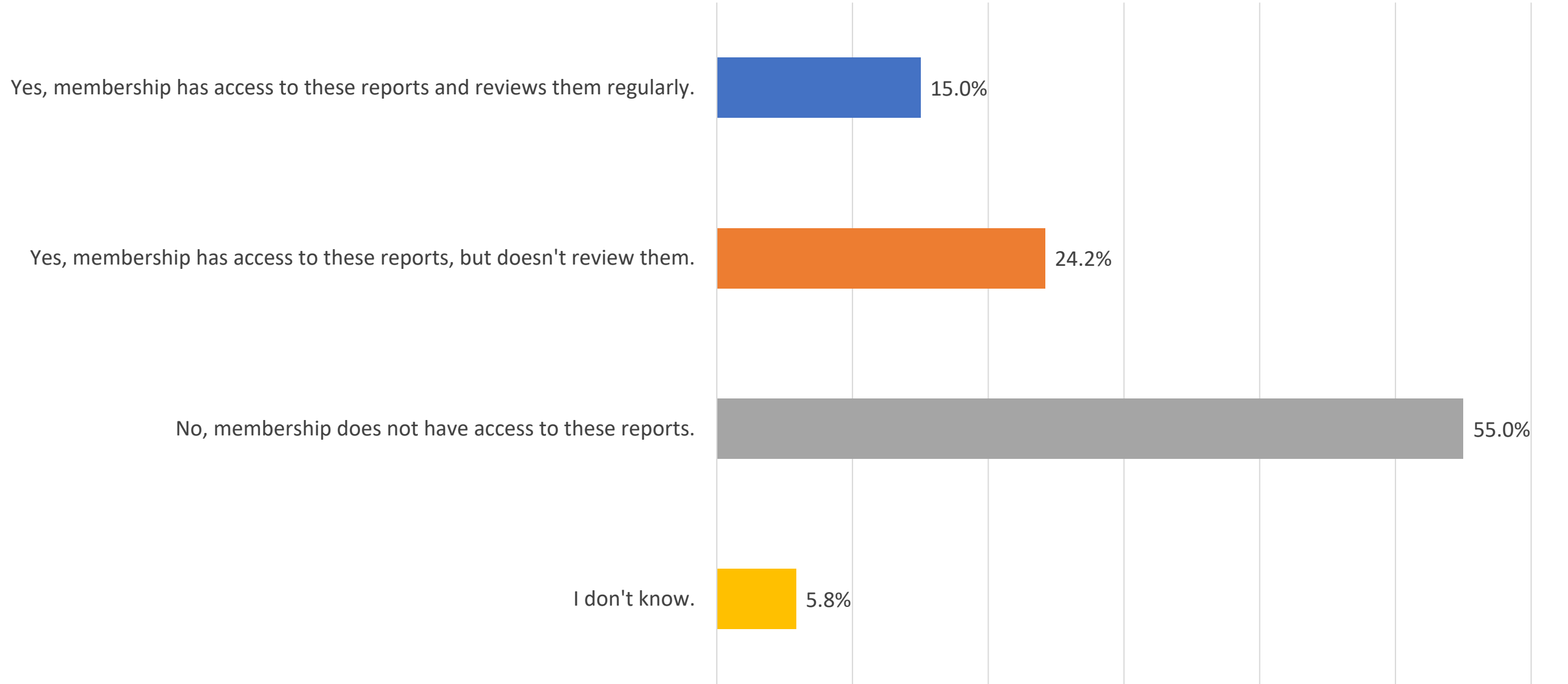
What type of role does membership have in social media content management?





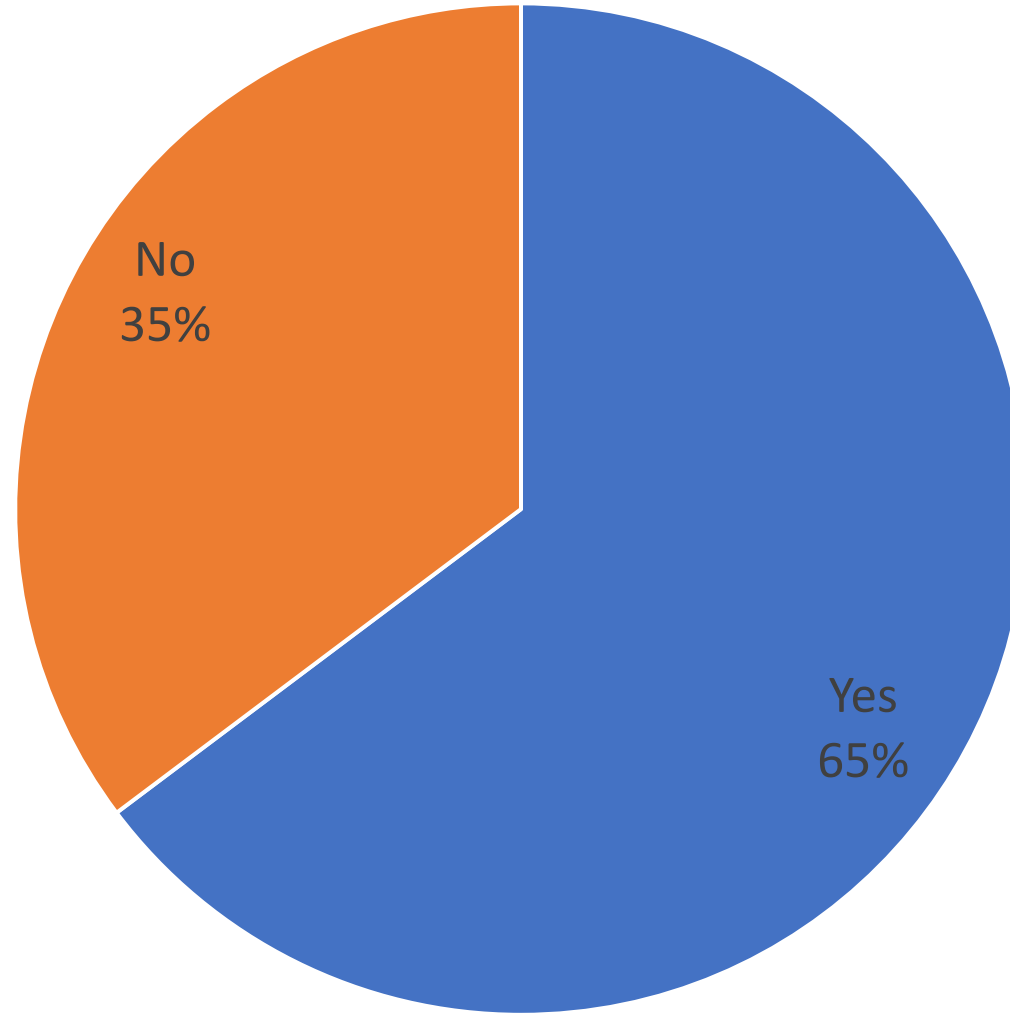
Does membership have access to and/or does membership review website/Google Analytics reports?

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0%



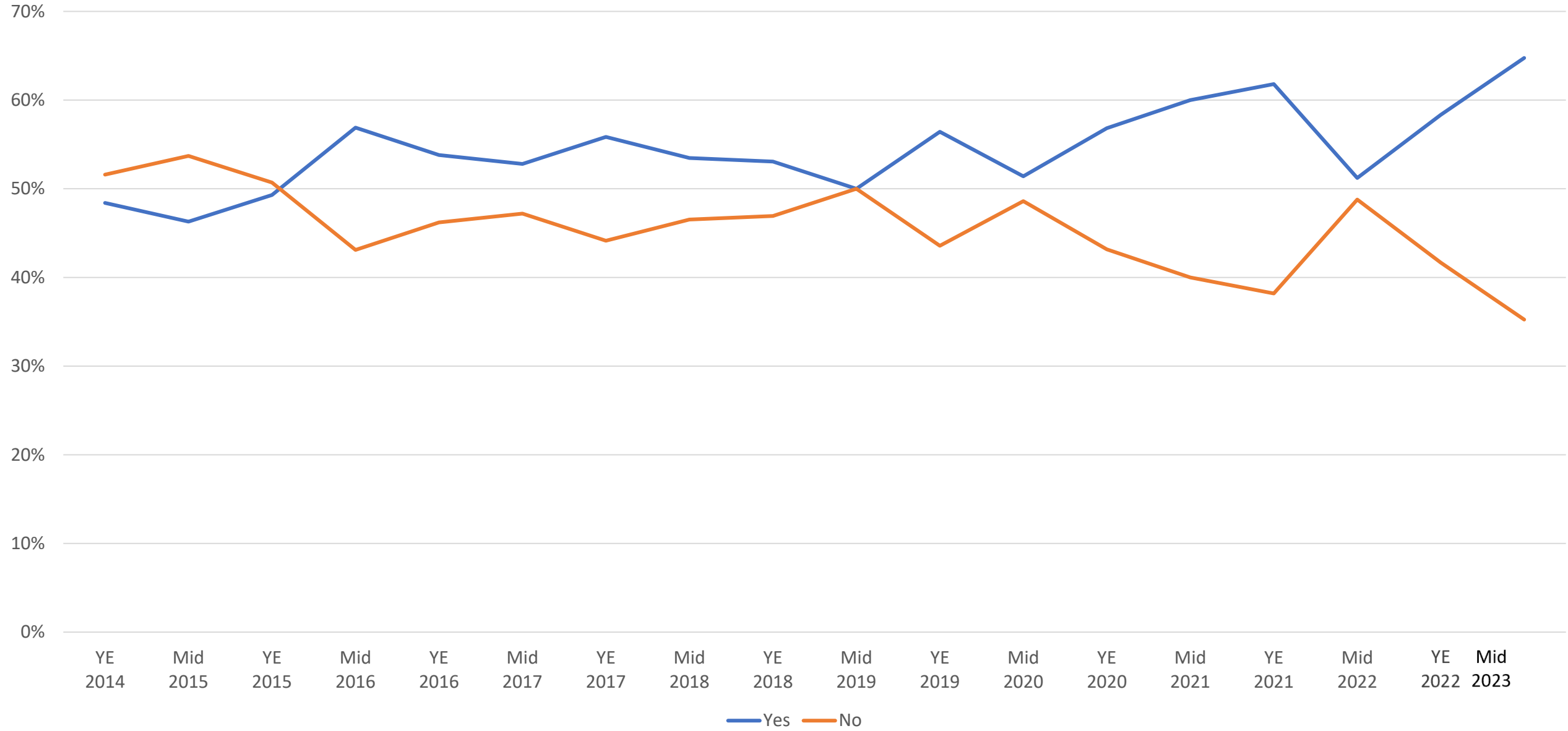


I am satisfied with the voice/role Membership has in our organization's social media strategy.





I am satisfied with the voice/role Membership has in our organization's social media strategy.

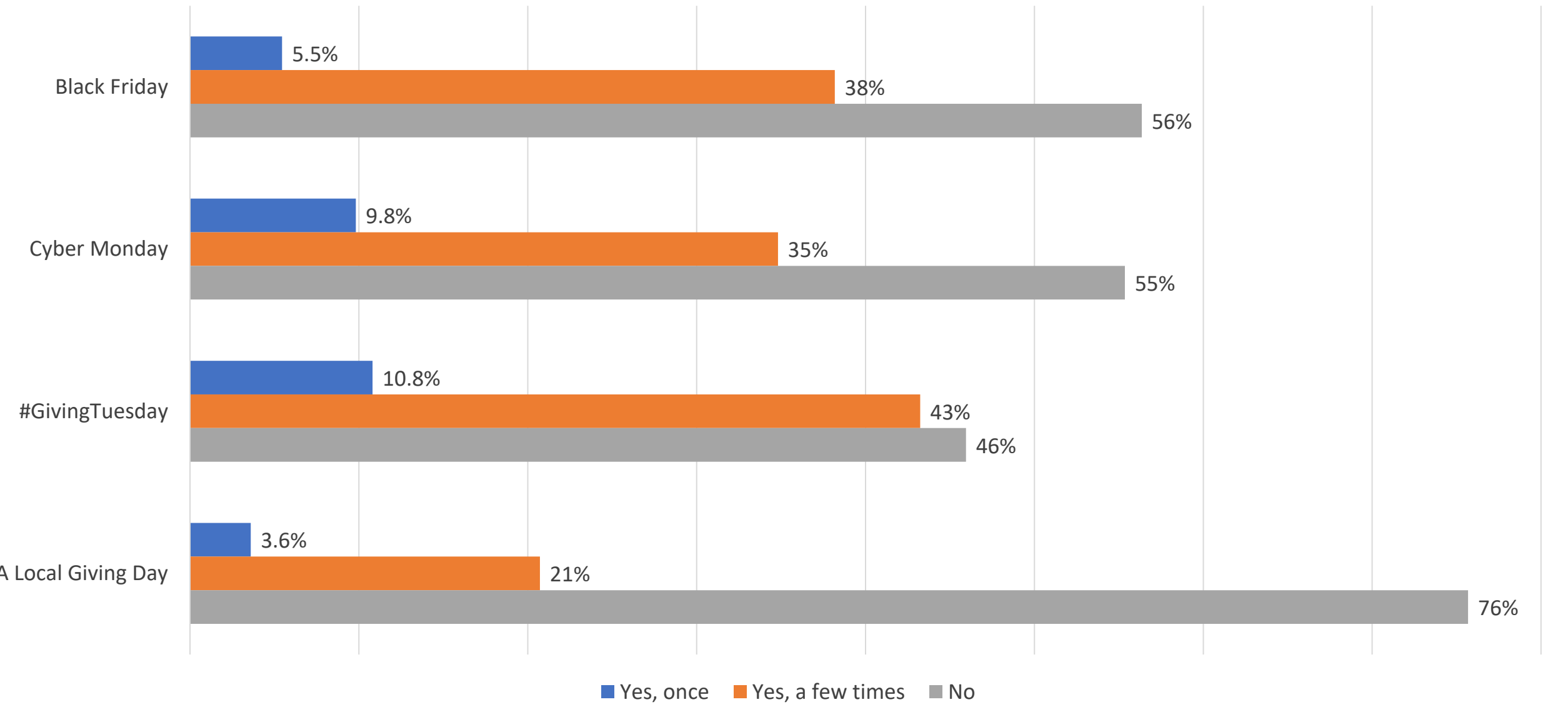


— Yes — No



Has your organization participated in any of the following promotions for membership?

0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0%

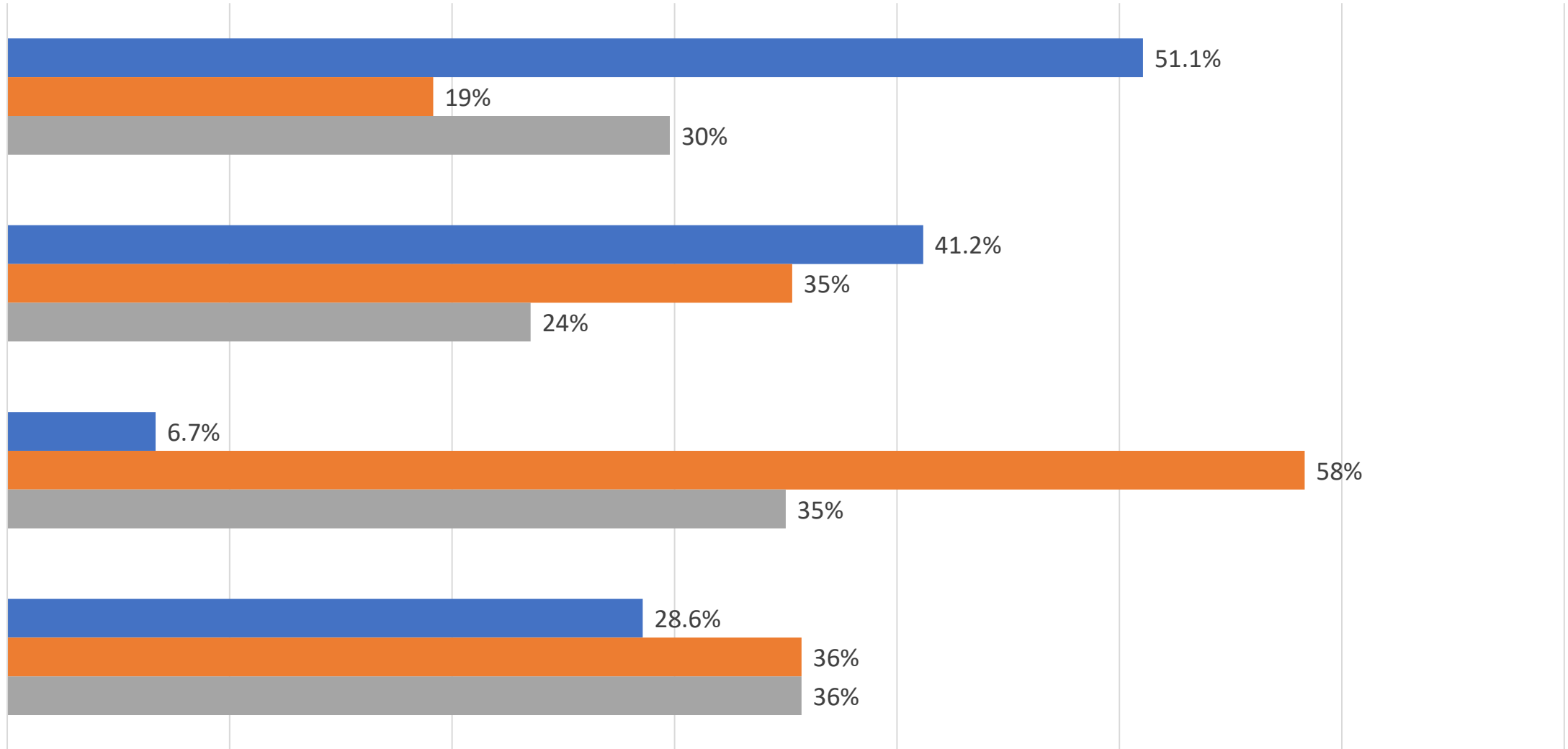


■ Yes, once ■ Yes, a few times ■ No



Was the campaign(s) successful?

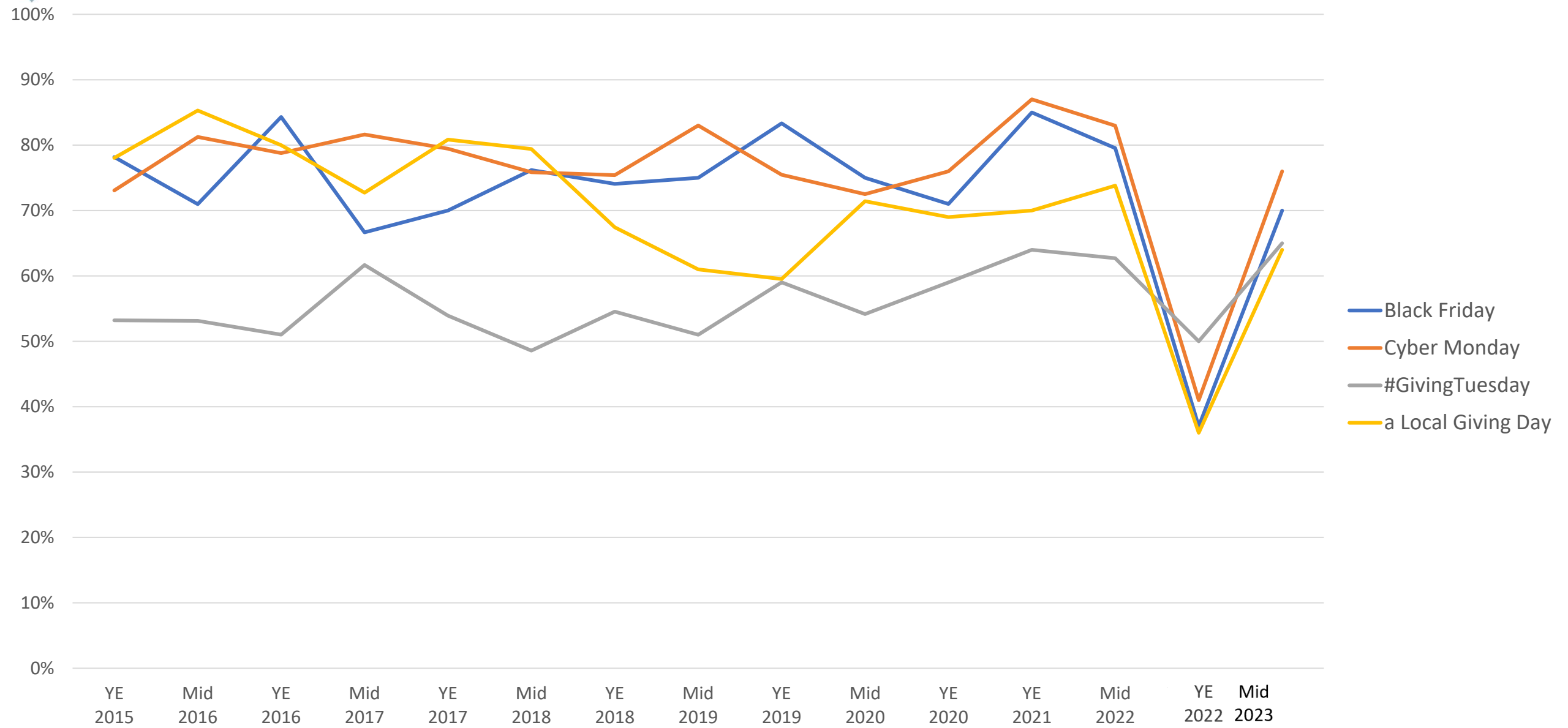
0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0%



Very Successful Somewhat Successful Not Successful

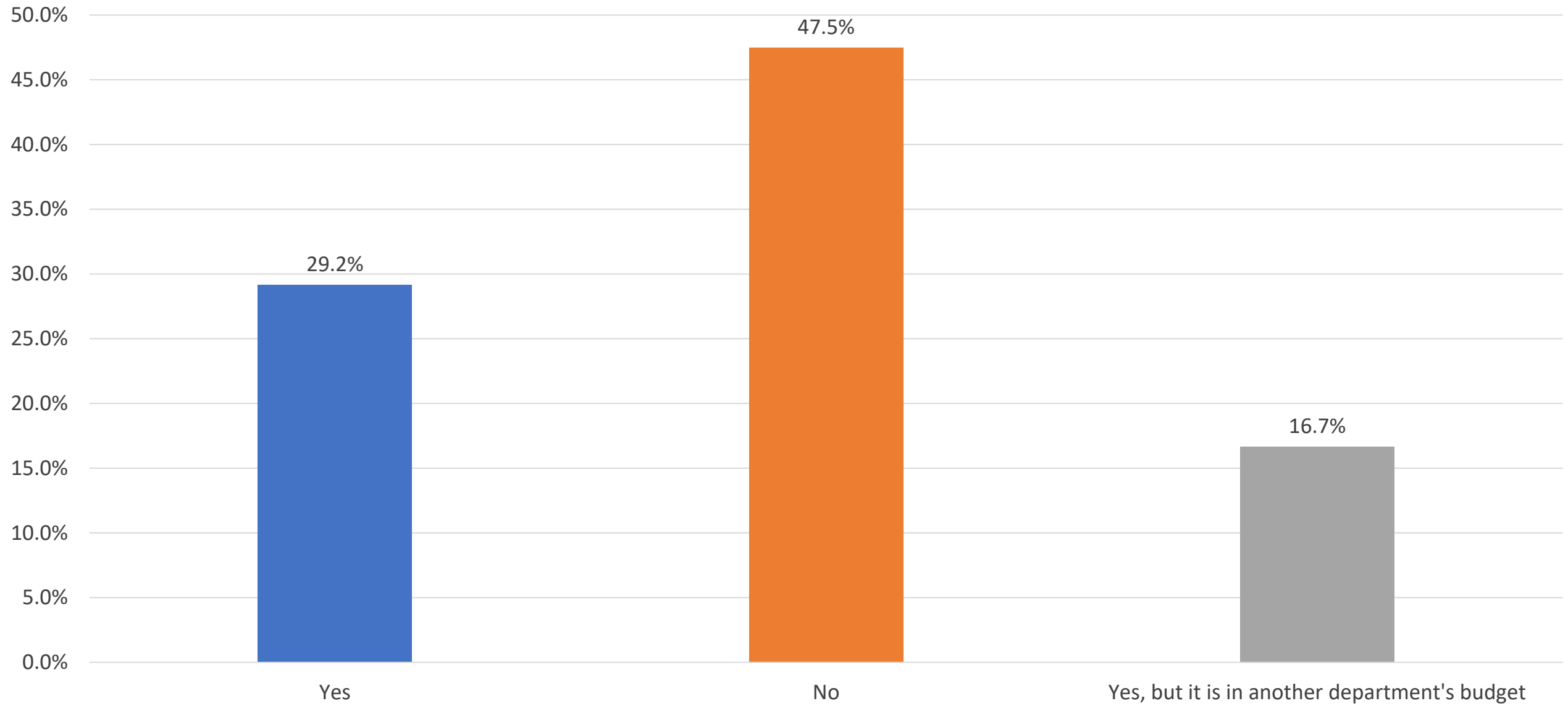


Giving Day Very or Somewhat Successful



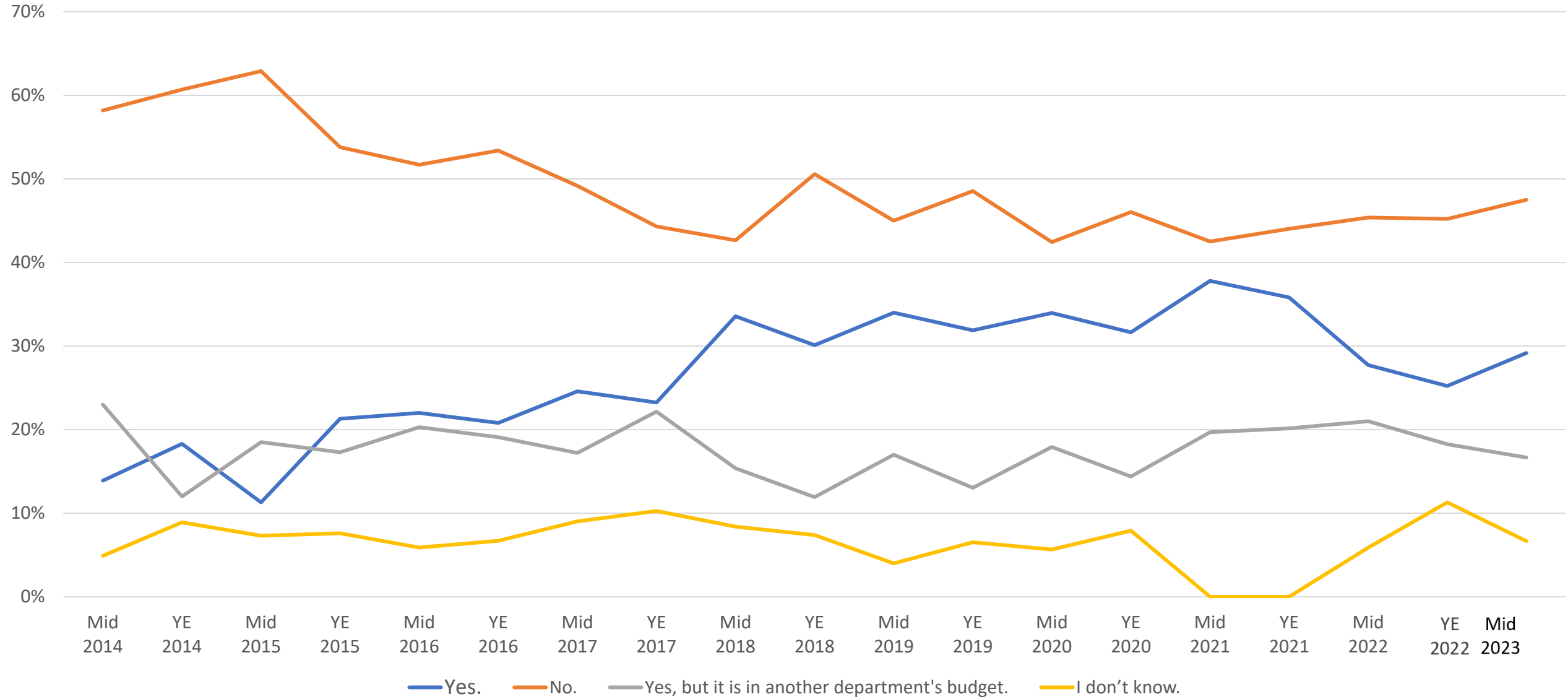


Does membership have a dedicated line item in the budget for digital marketing (e.g., online advertising, social media campaigns, email marketing, etc.)?



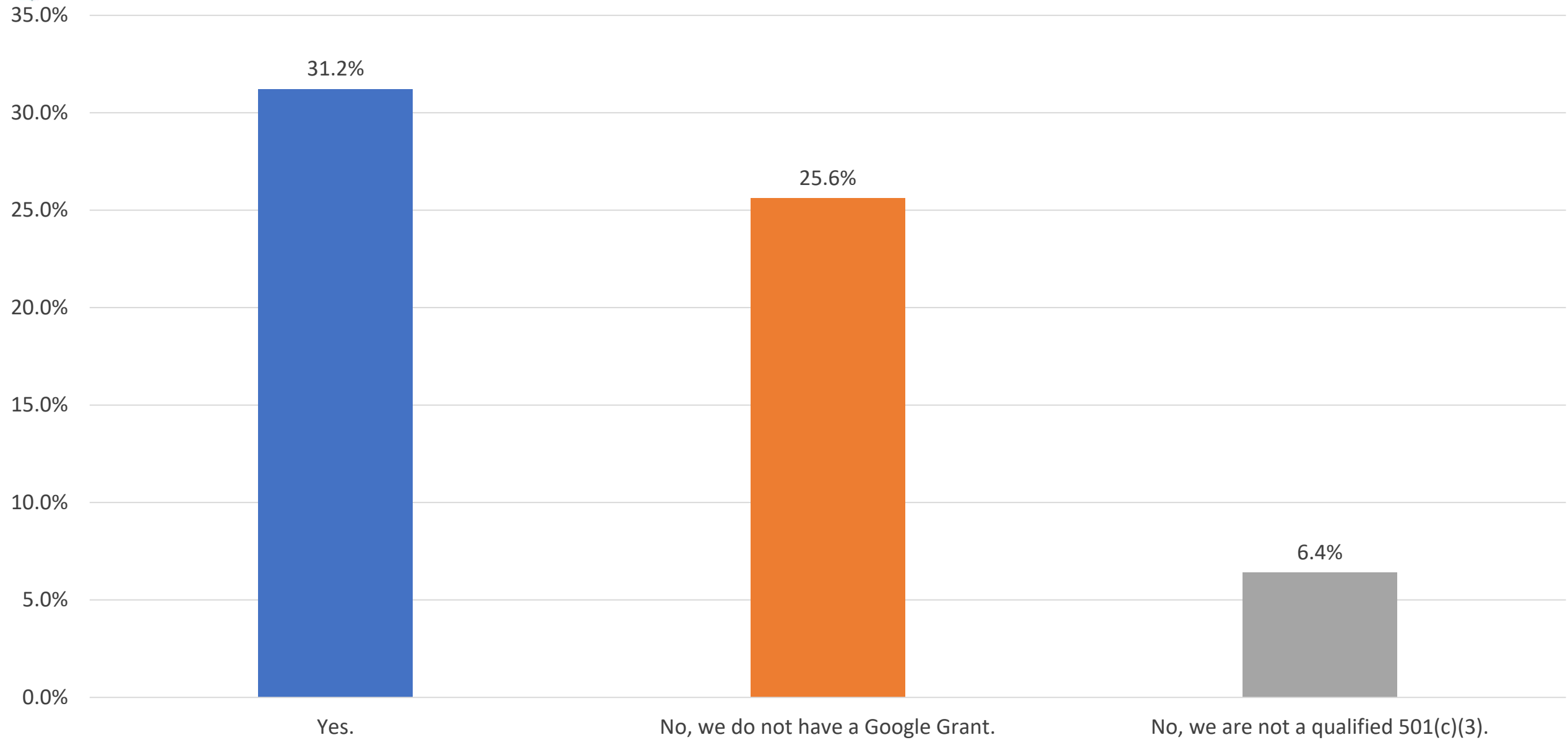


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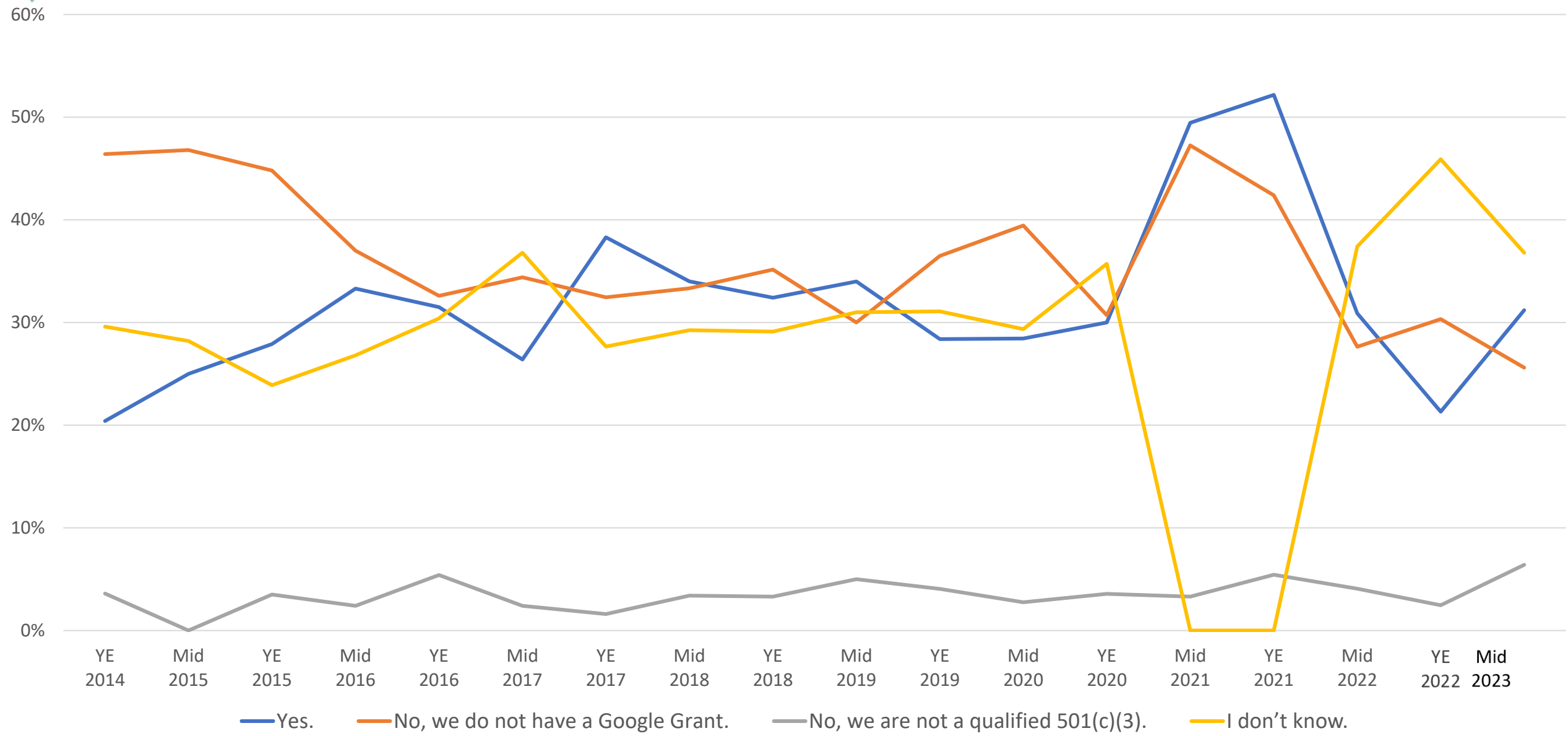


Does your organization have a Google Grant for online advertising (i.e., Google AdWords)?



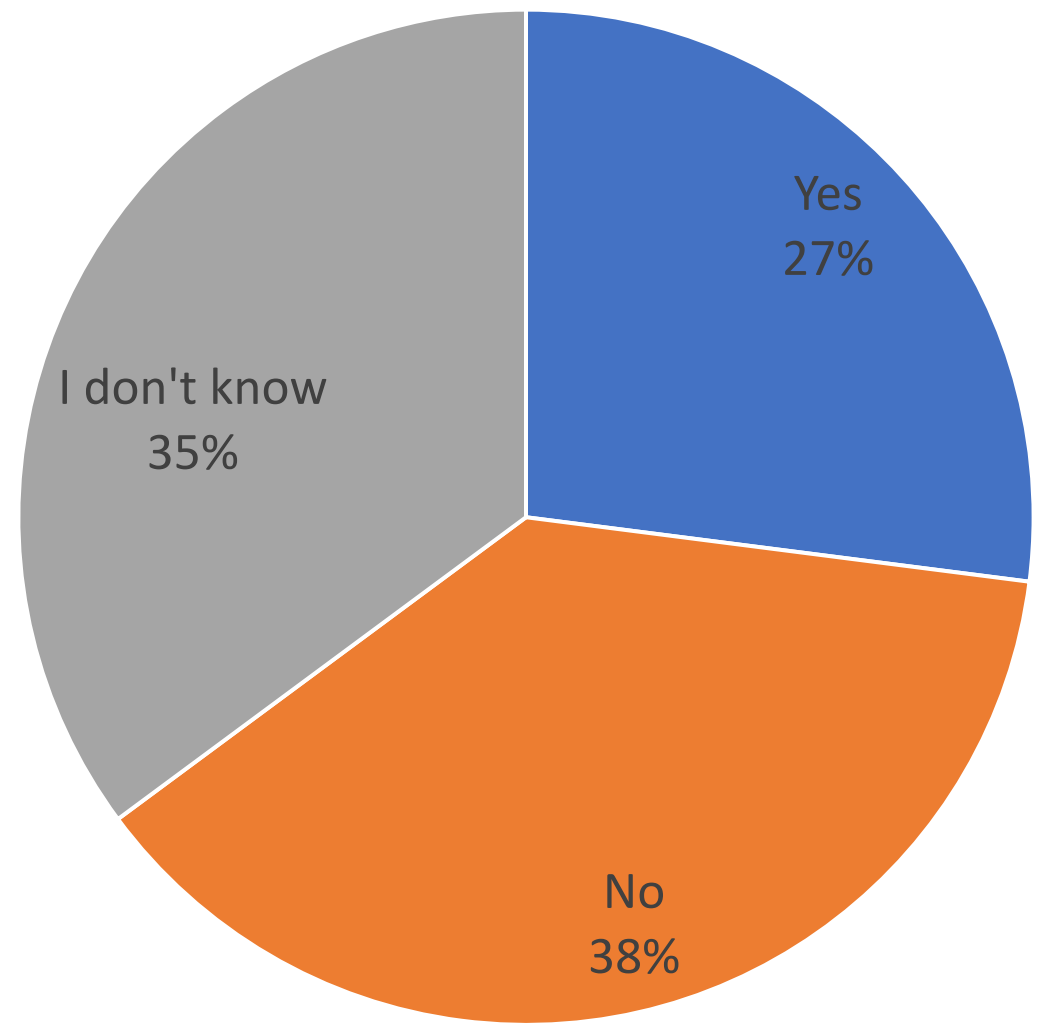


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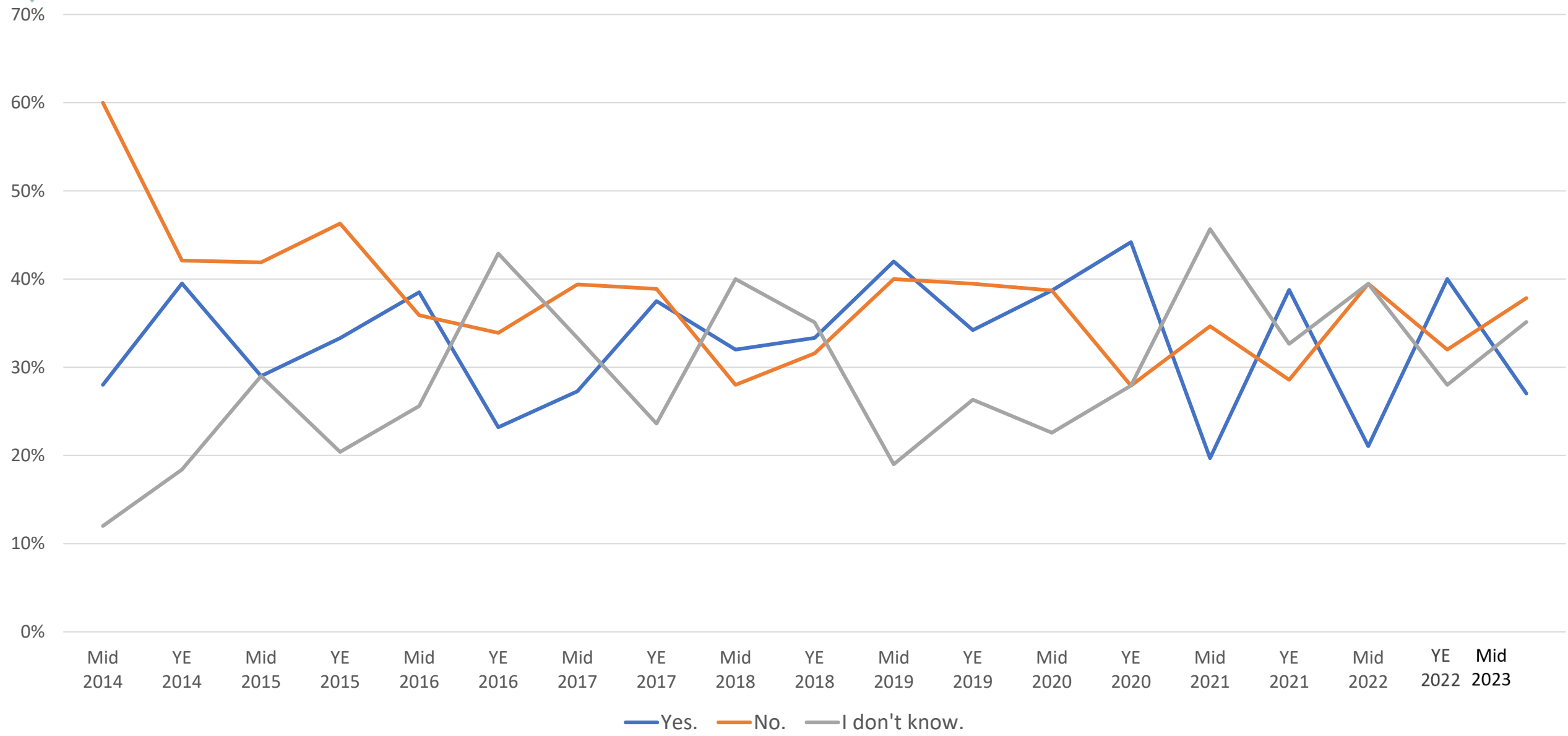


Is Membership acquisition supported by membership advertising as portion of the Google Grant?





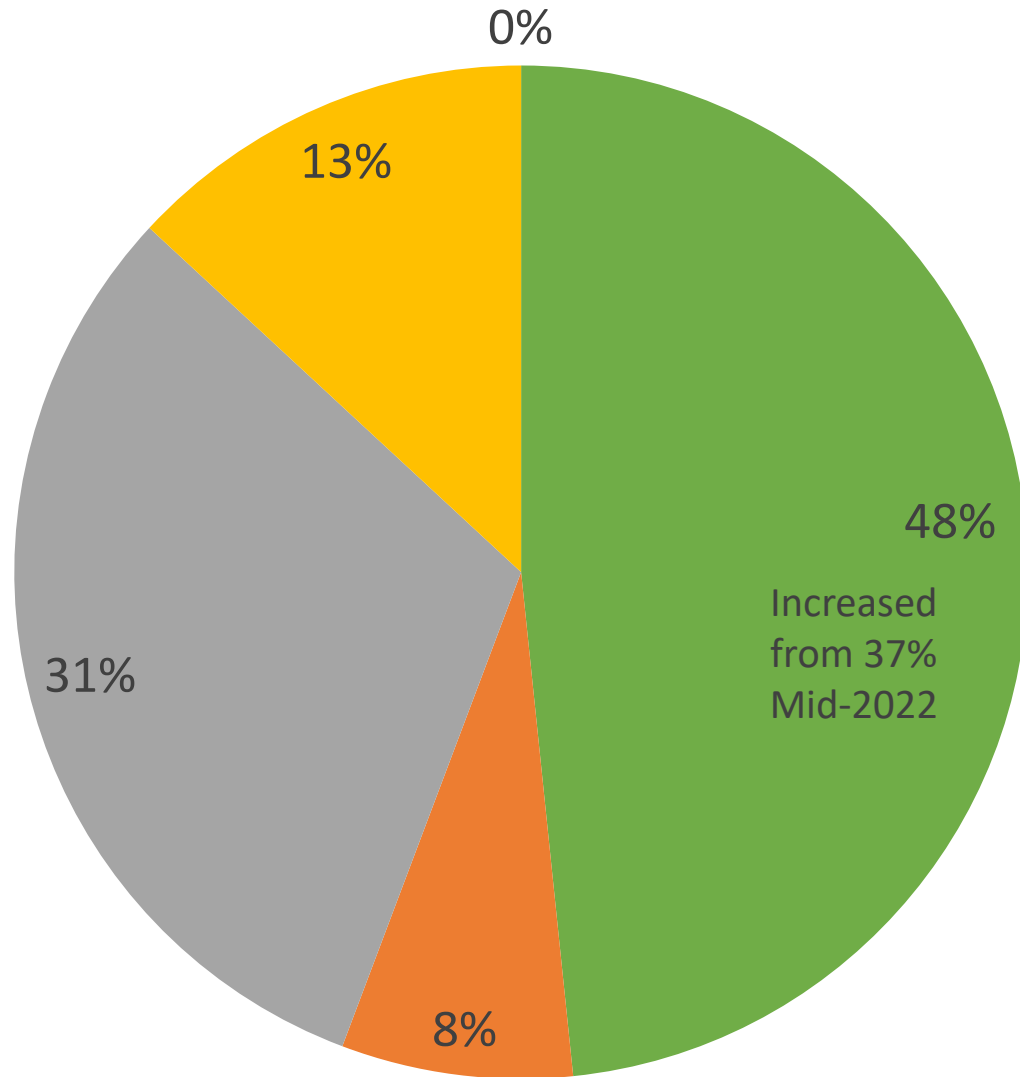
Is Membership acquisition supported by membership advertising as a portion of the Google Grant?



— Yes. — No. — I don't know.



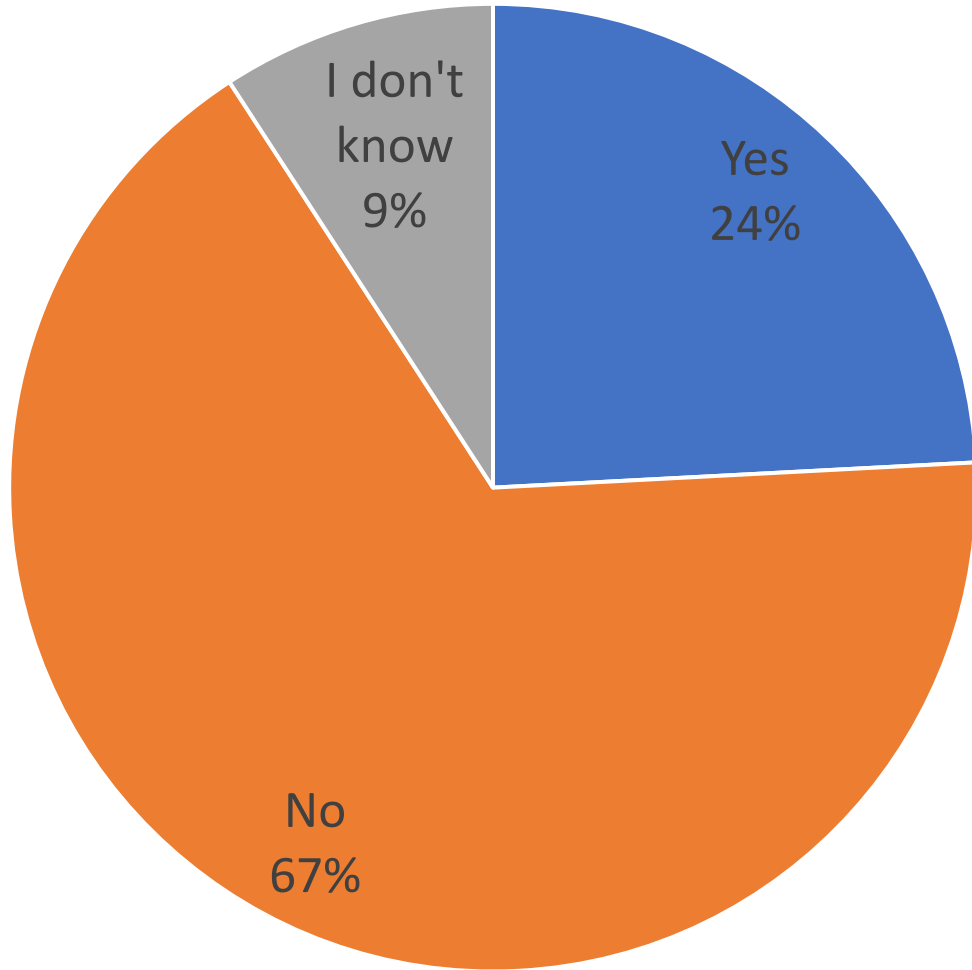
Are you currently able to deliver digital membership cards to your members?



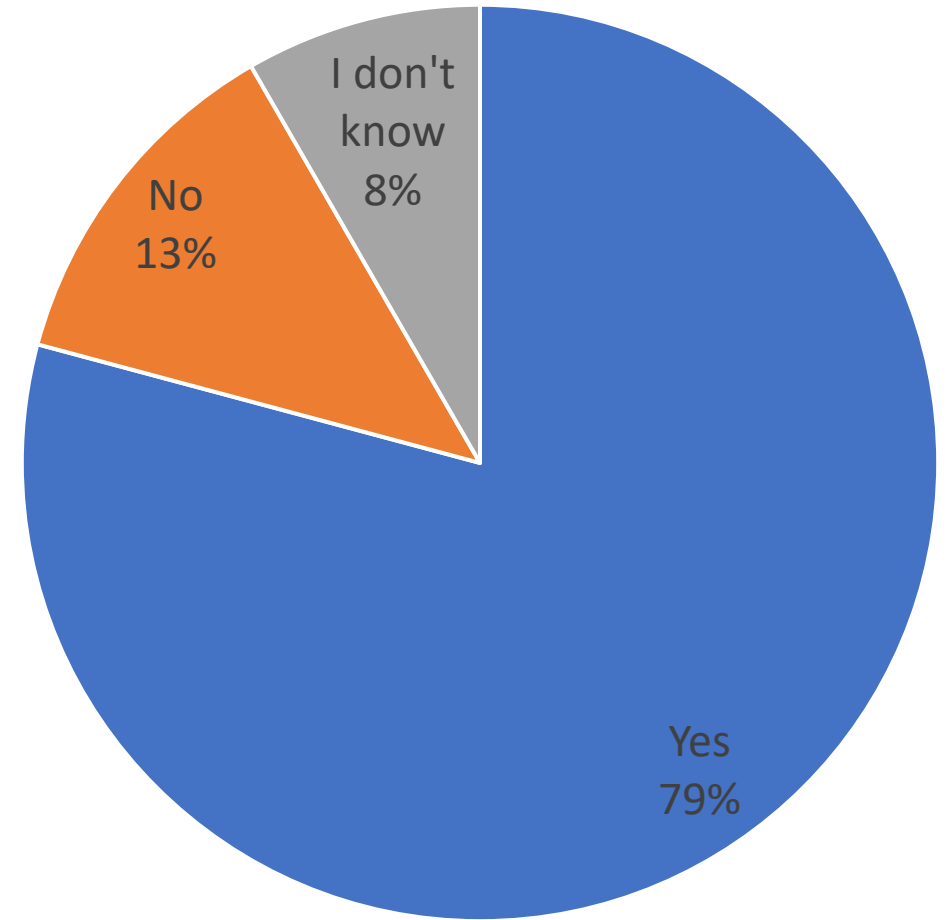
- Yes, and we do offer this service to members.
- Yes, but we do not offer this service to members.
- No, we are unable to offer this service to members, but would like to offer it to members.
- No, we are unable to offer this service to members, and do not wish to offer it to members.
- I don't know about our digital member card capabilities.



Does your organization limit the number of emails members can receive?



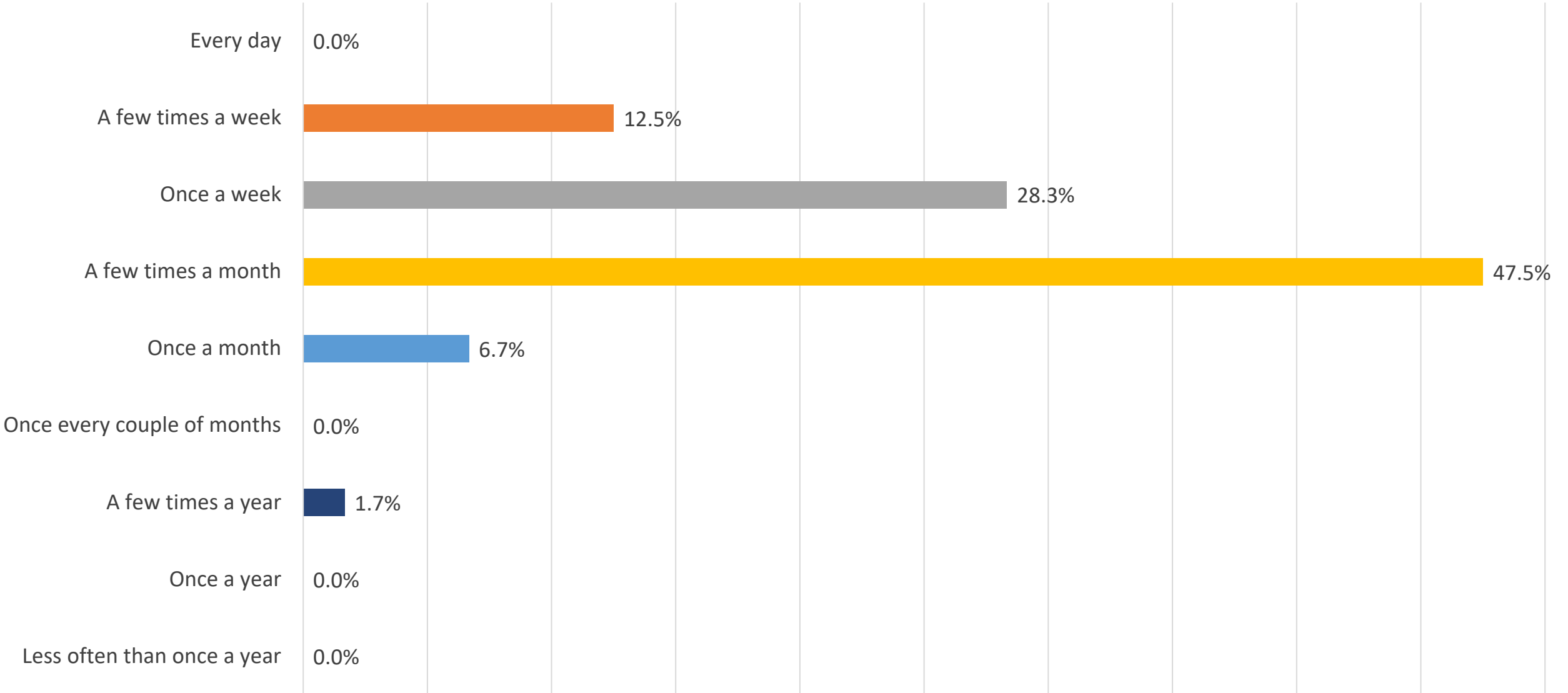
Are you able to send promotional emails about membership to the institutional house list (e.g., ticket buyers, visitors, etc.)?





How often do your members receive email communication from your organization?

0.0% 5.0% 10.0% 15.0% 20.0% 25.0% 30.0% 35.0% 40.0% 45.0% 50.0%





Recap – Digital, Online, Social Media and Mobile Marketing

- Online & digital communications are very important
- Need for budgeting for digital efforts
- Increases in digital member card usage among institutions
- Still a need for more access for membership managers for digital reporting and analytics
- Recommend 24 to 48 email touches annually for members

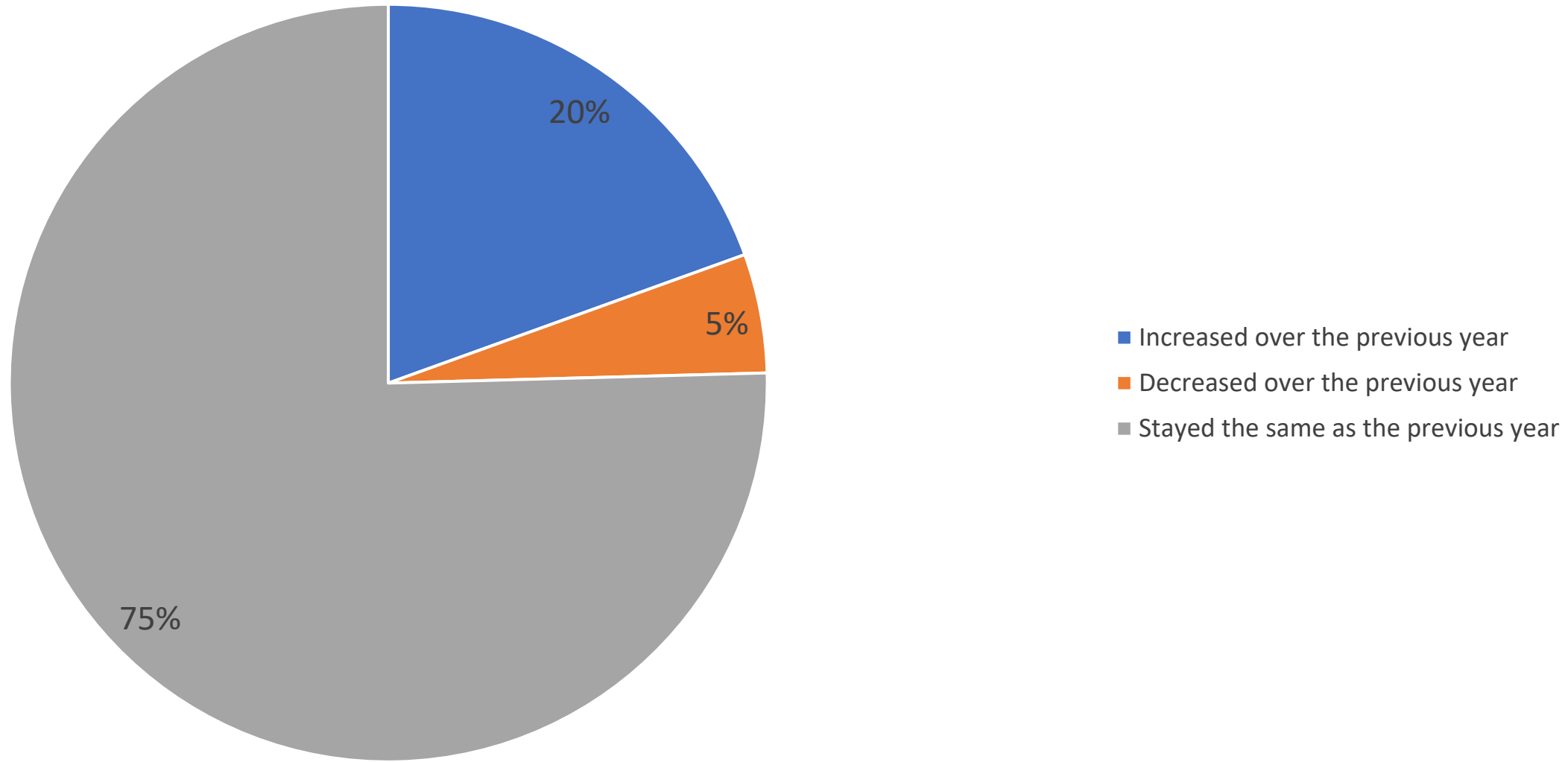


Staffing and Salary

Pulse 2023 Mid-Year Data

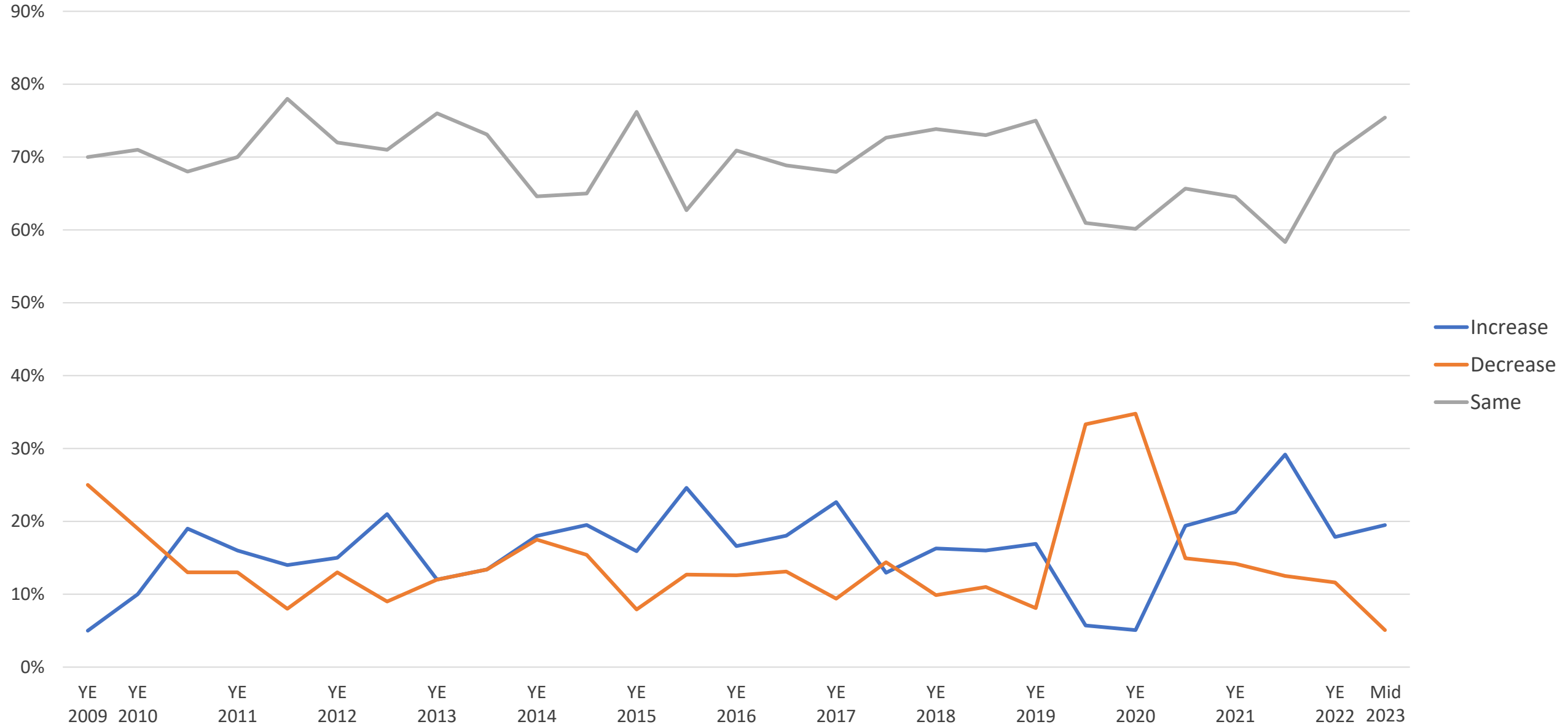


In 2023 year-to-date, staffing levels within the membership department...





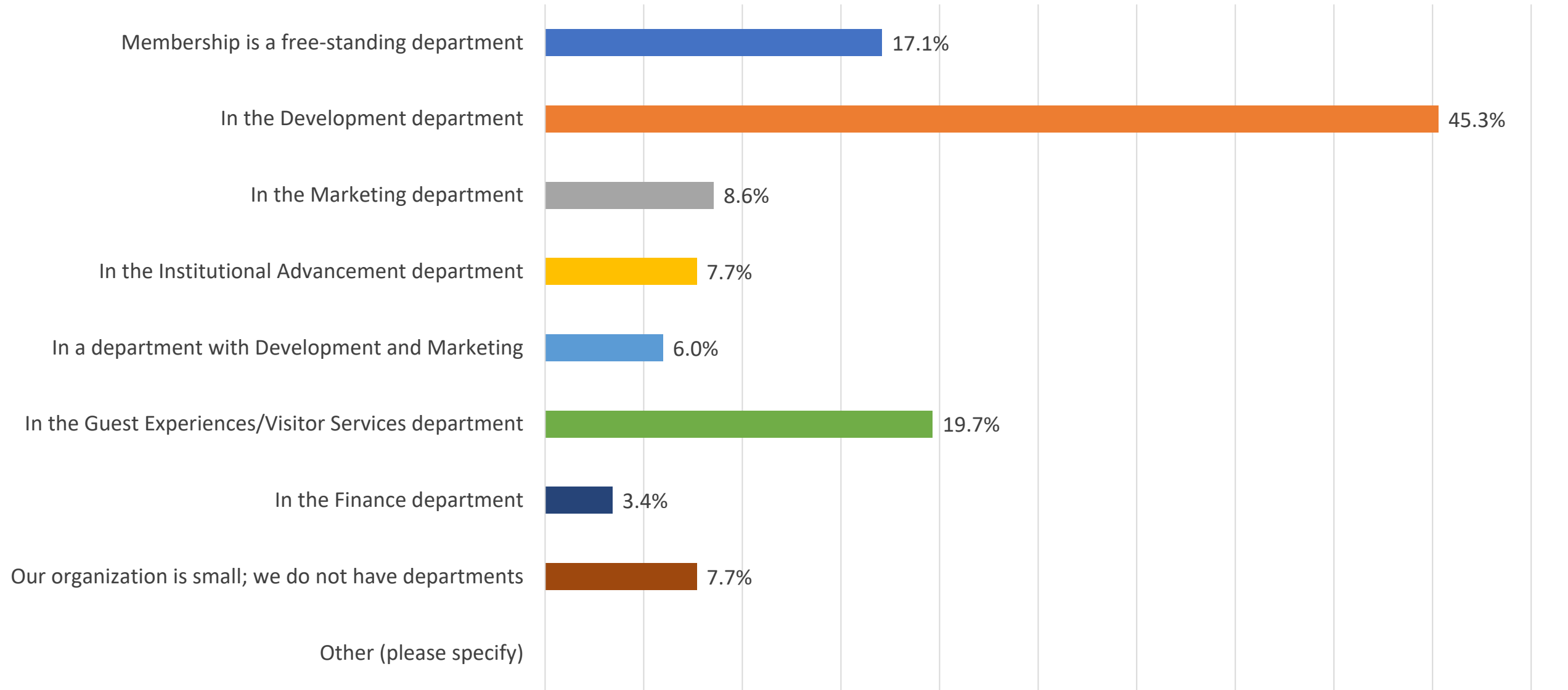
Staffing Levels





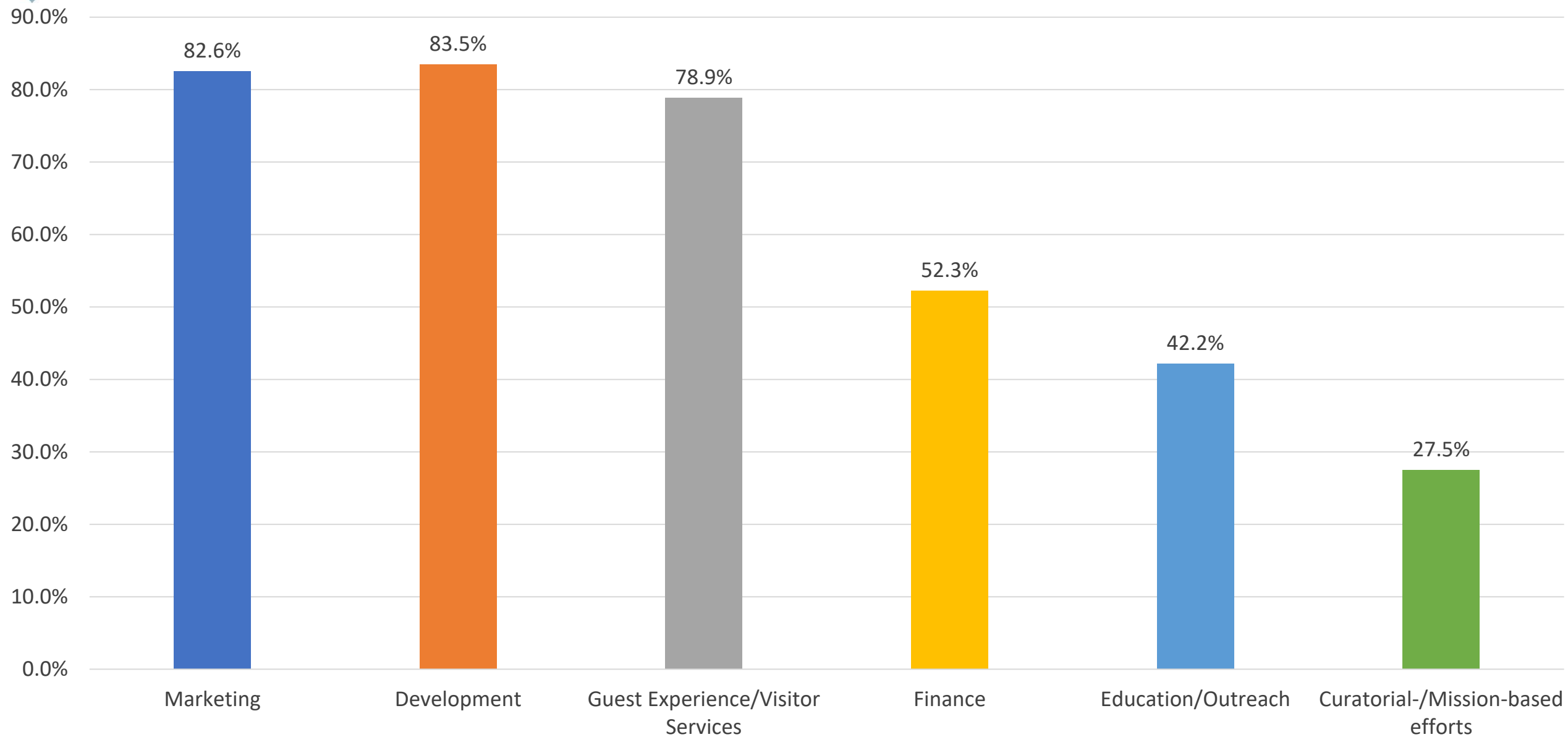
How is Membership positioned in your organization?

0.0% 5.0% 10.0% 15.0% 20.0% 25.0% 30.0% 35.0% 40.0% 45.0% 50.0%



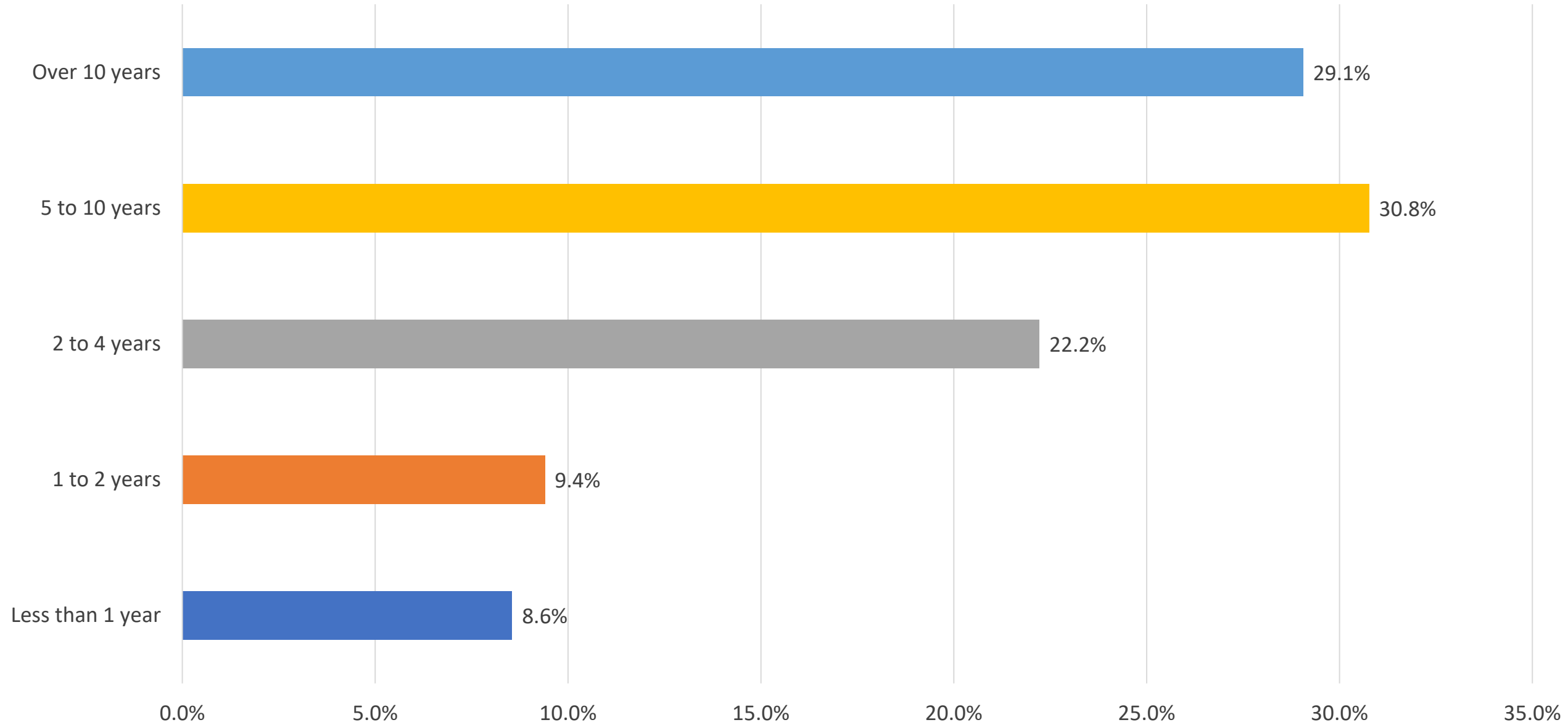


Does Membership planning occur with and do you have the support of the following departments?



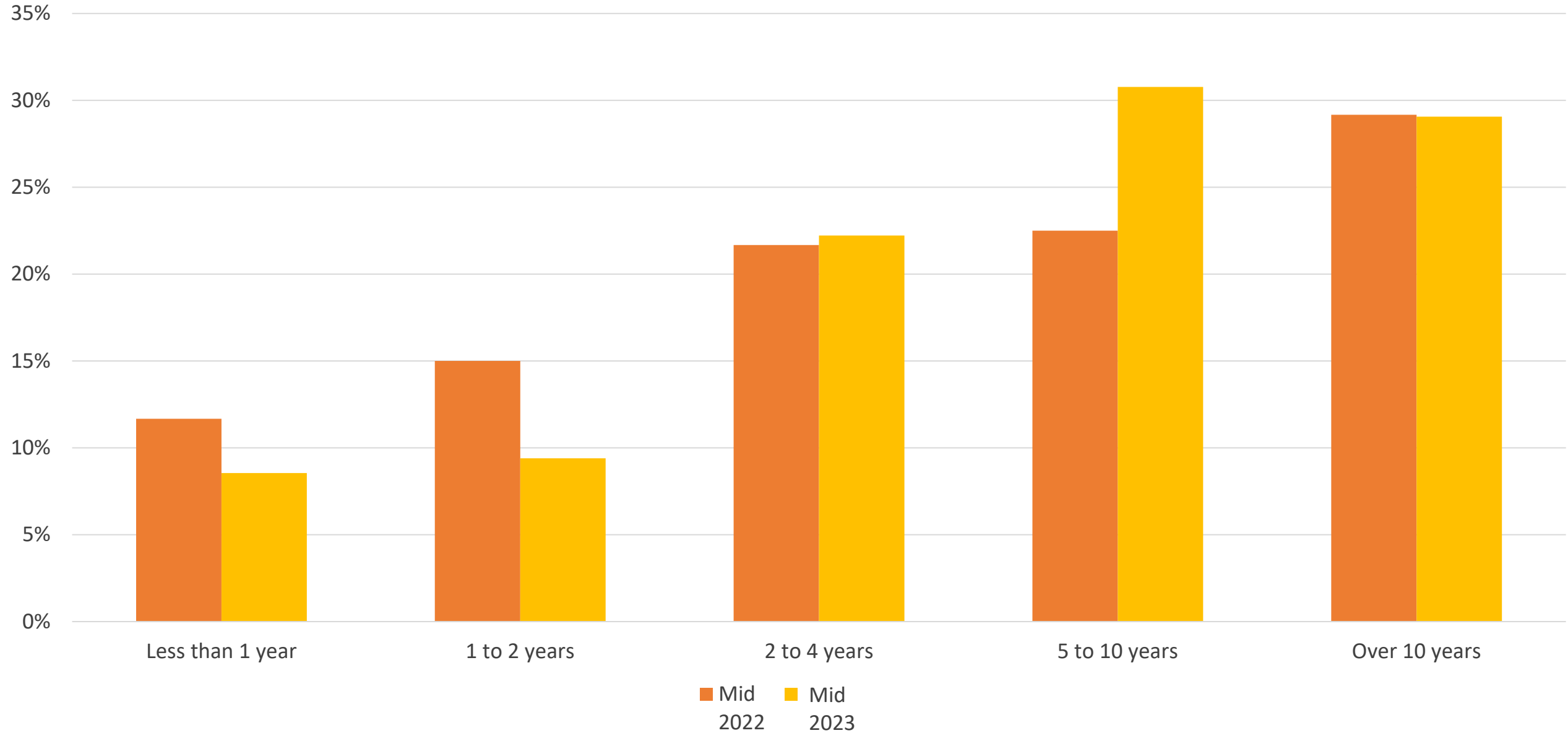


How long have you served in a membership position?



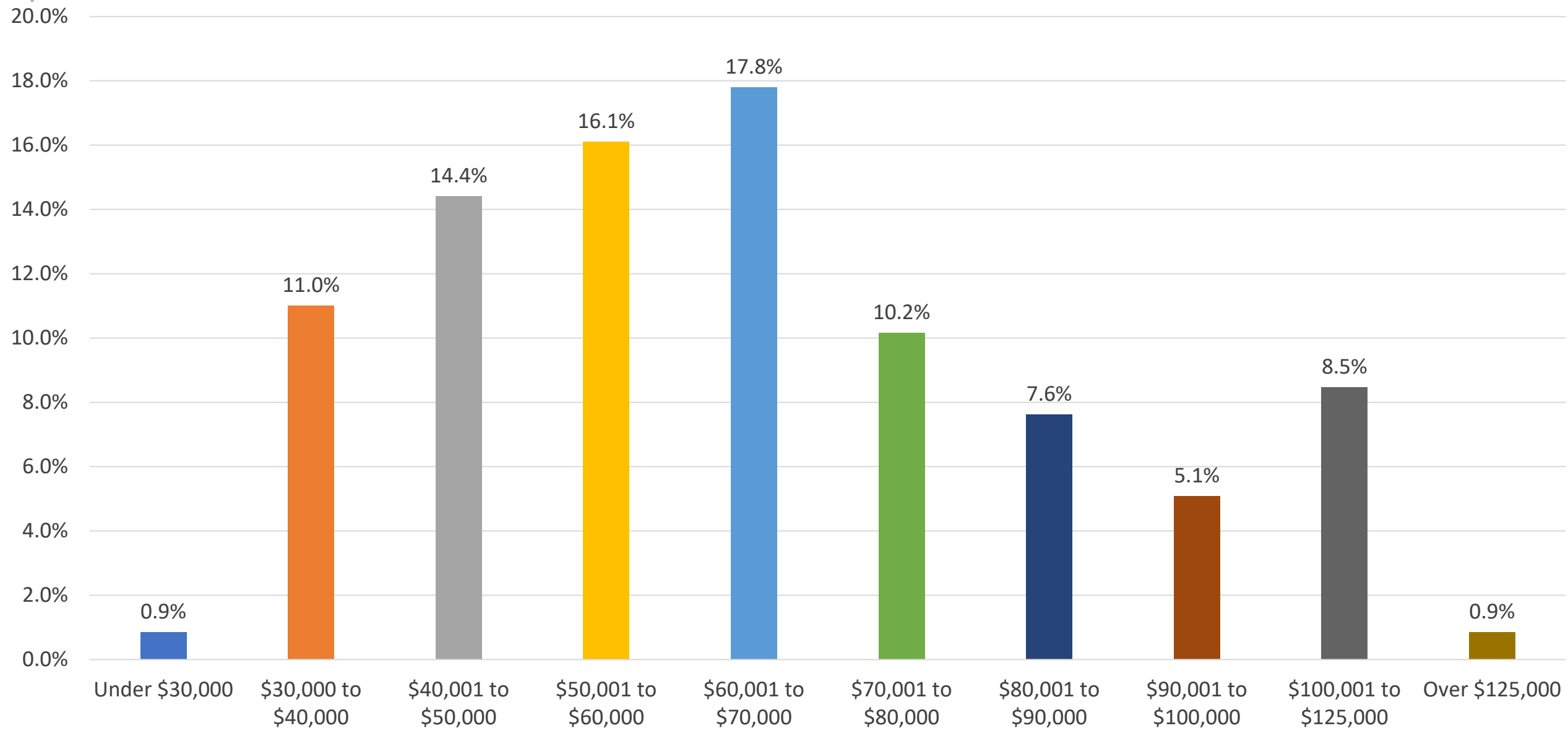


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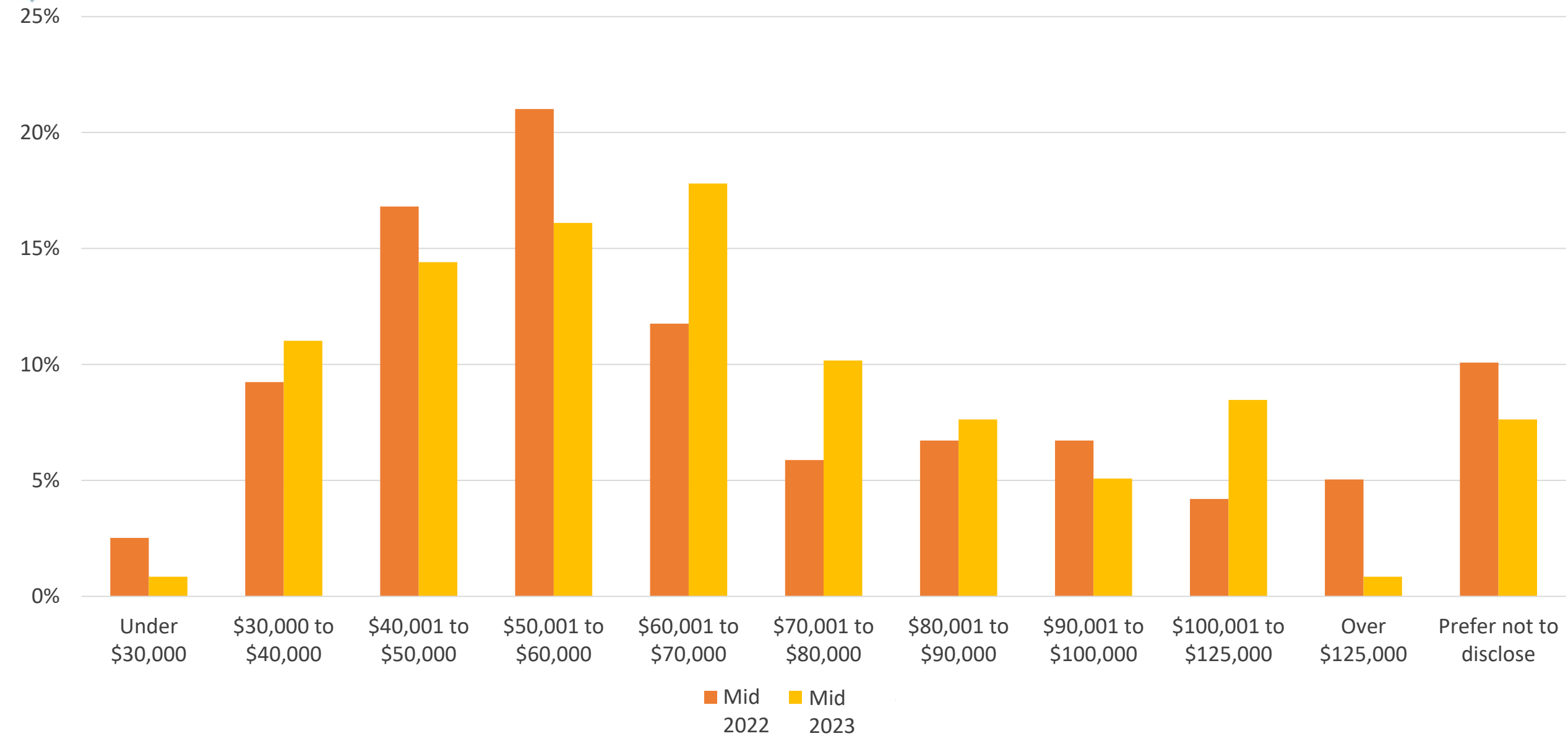


What is your annual salary range?





What is your annual salary range?



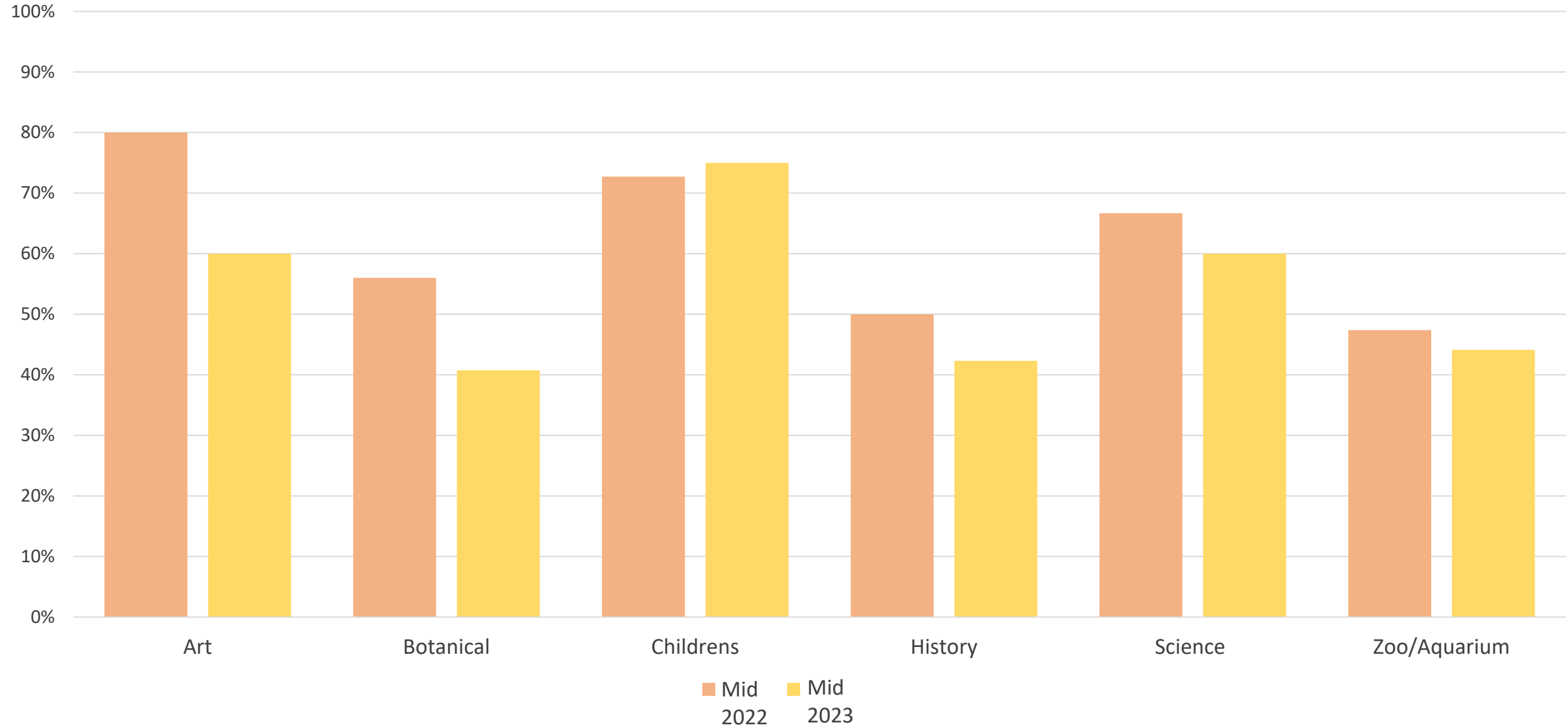


Trends by Niche Audience

Pulse 2023 Mid-Year Data

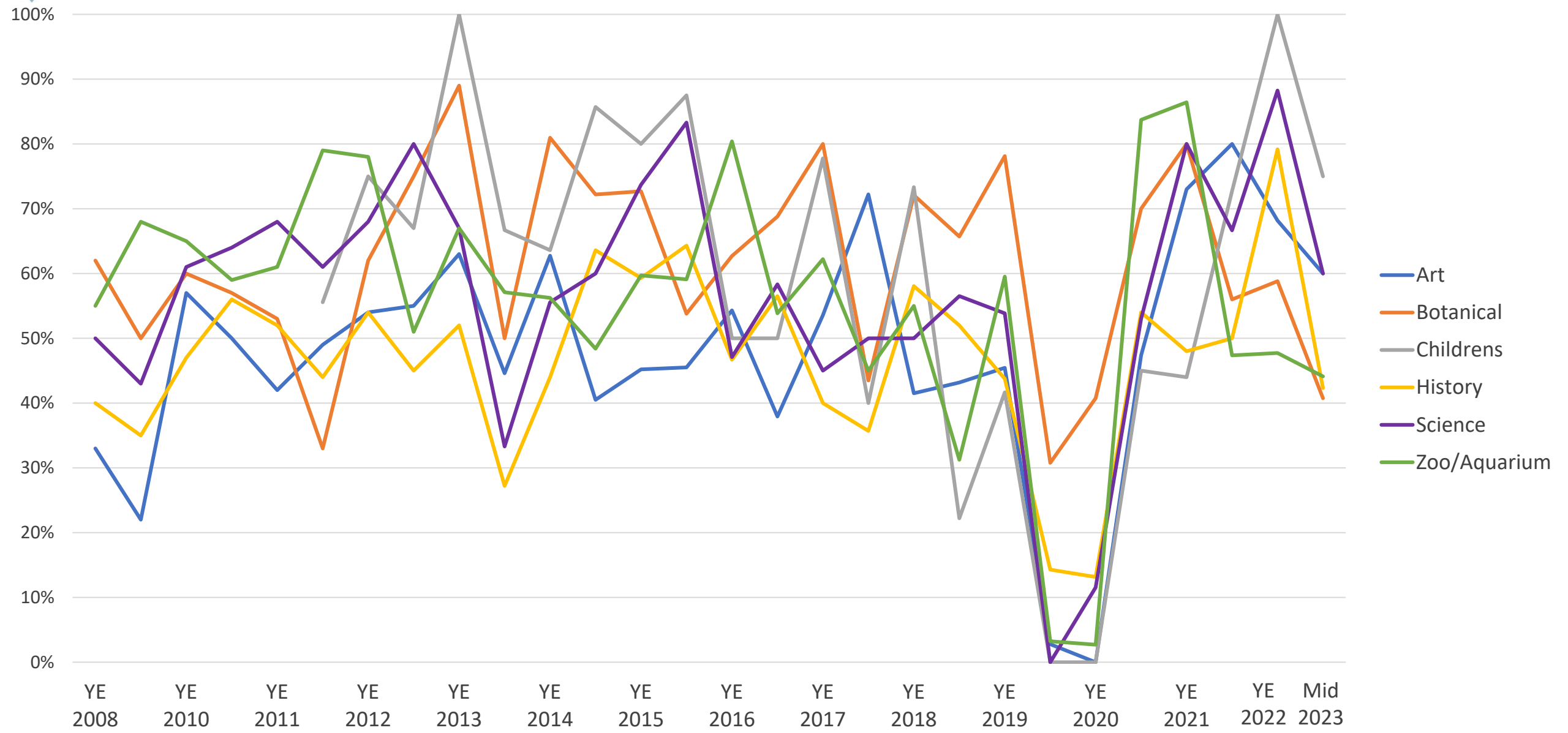


Membership increase from last year



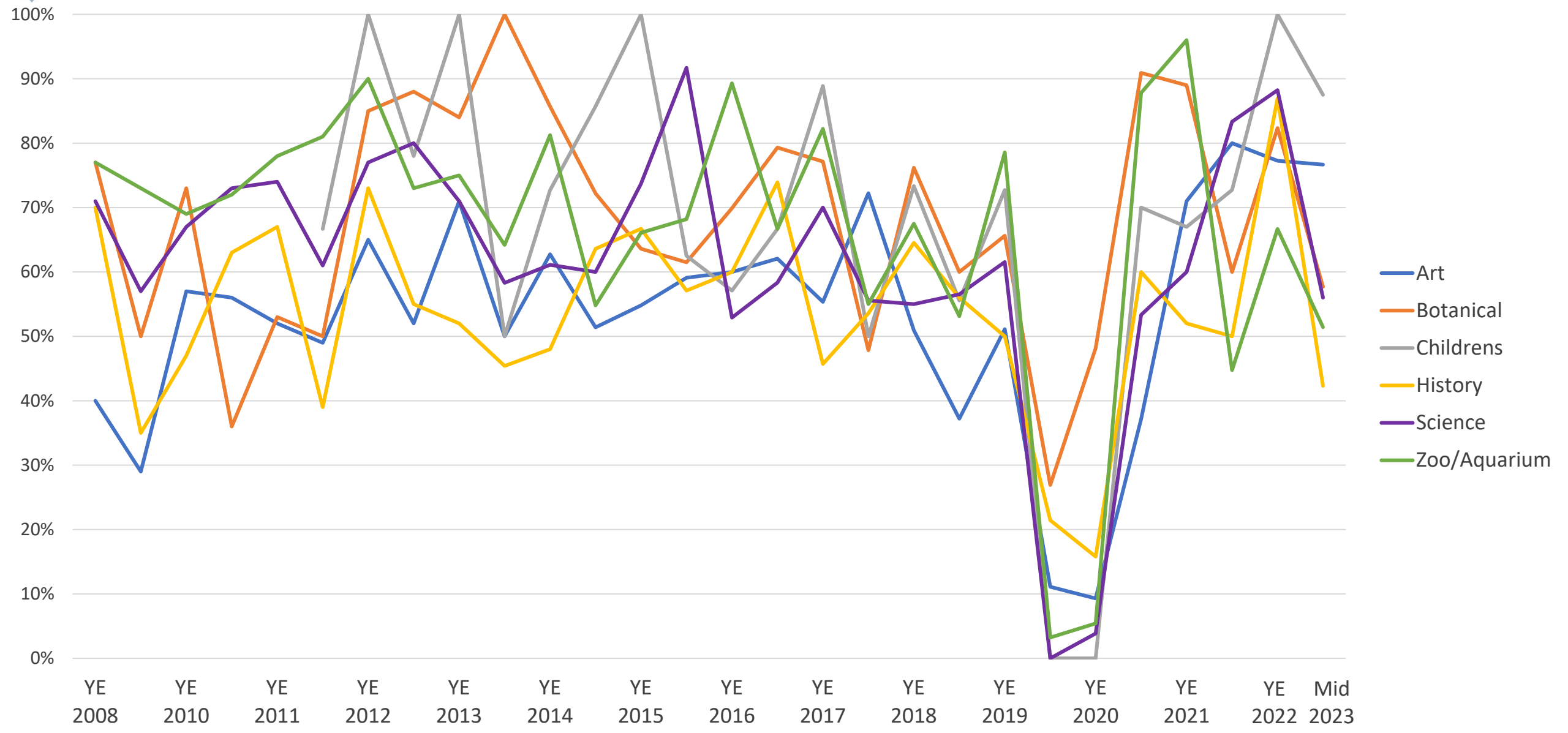


Membership increase from last year



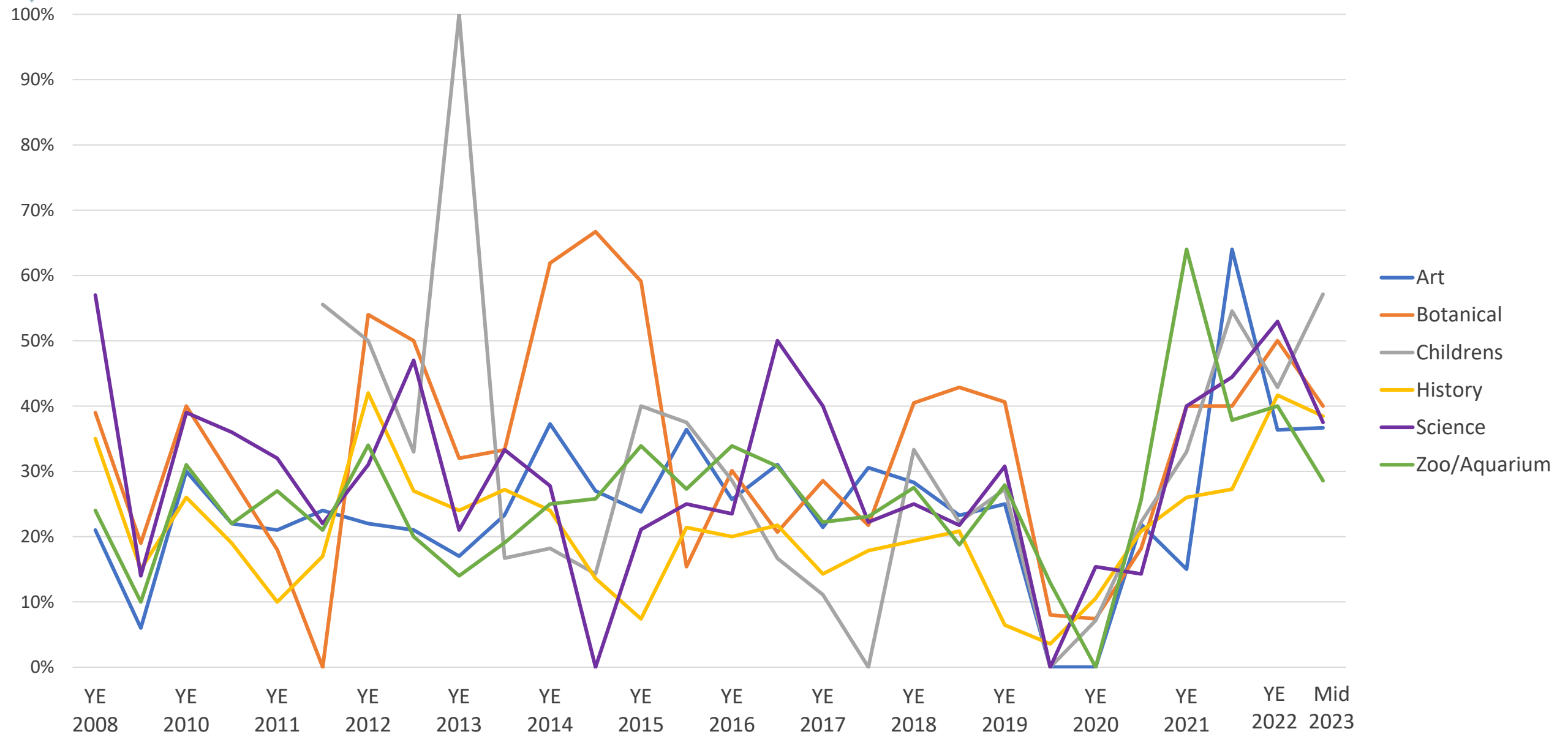


Increased Revenue over last year



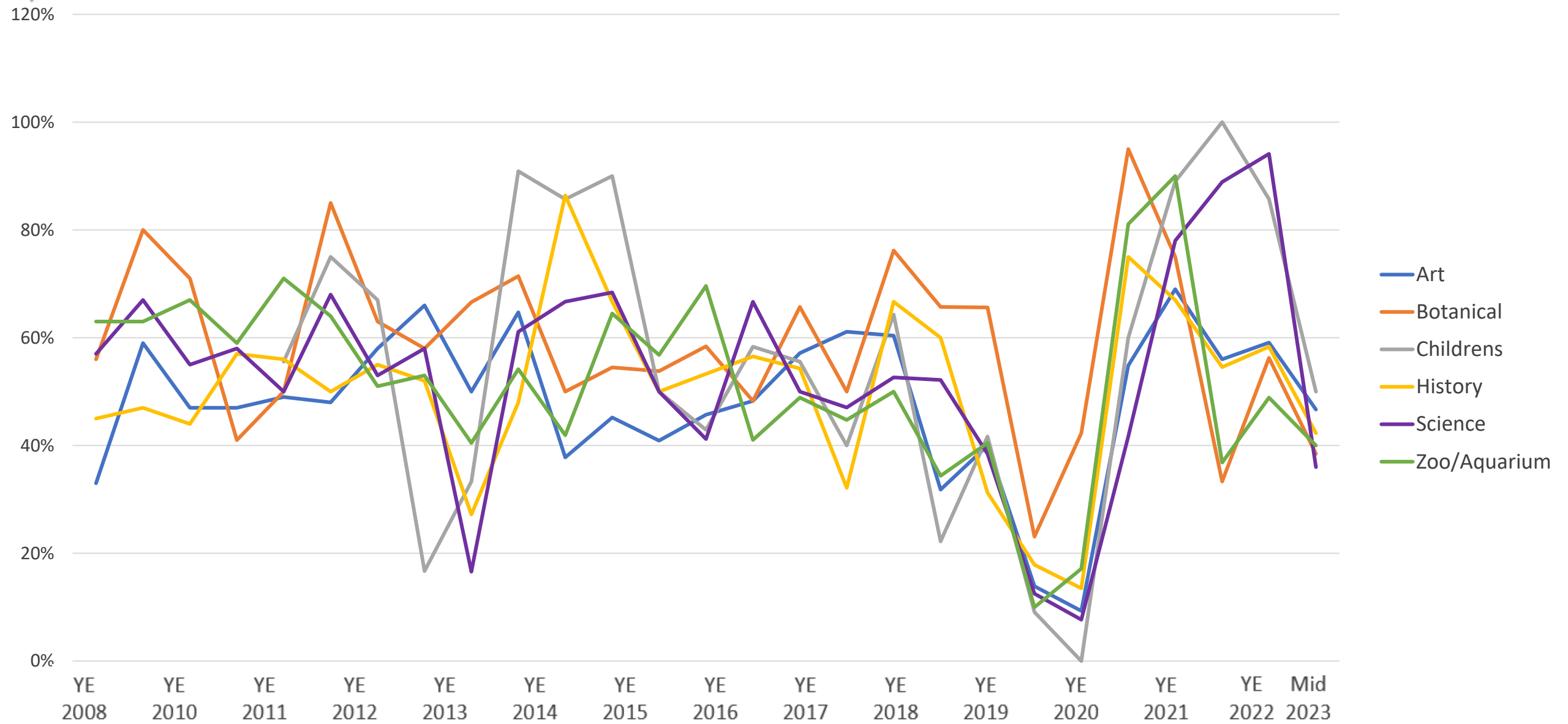


Budgets Increased over last year



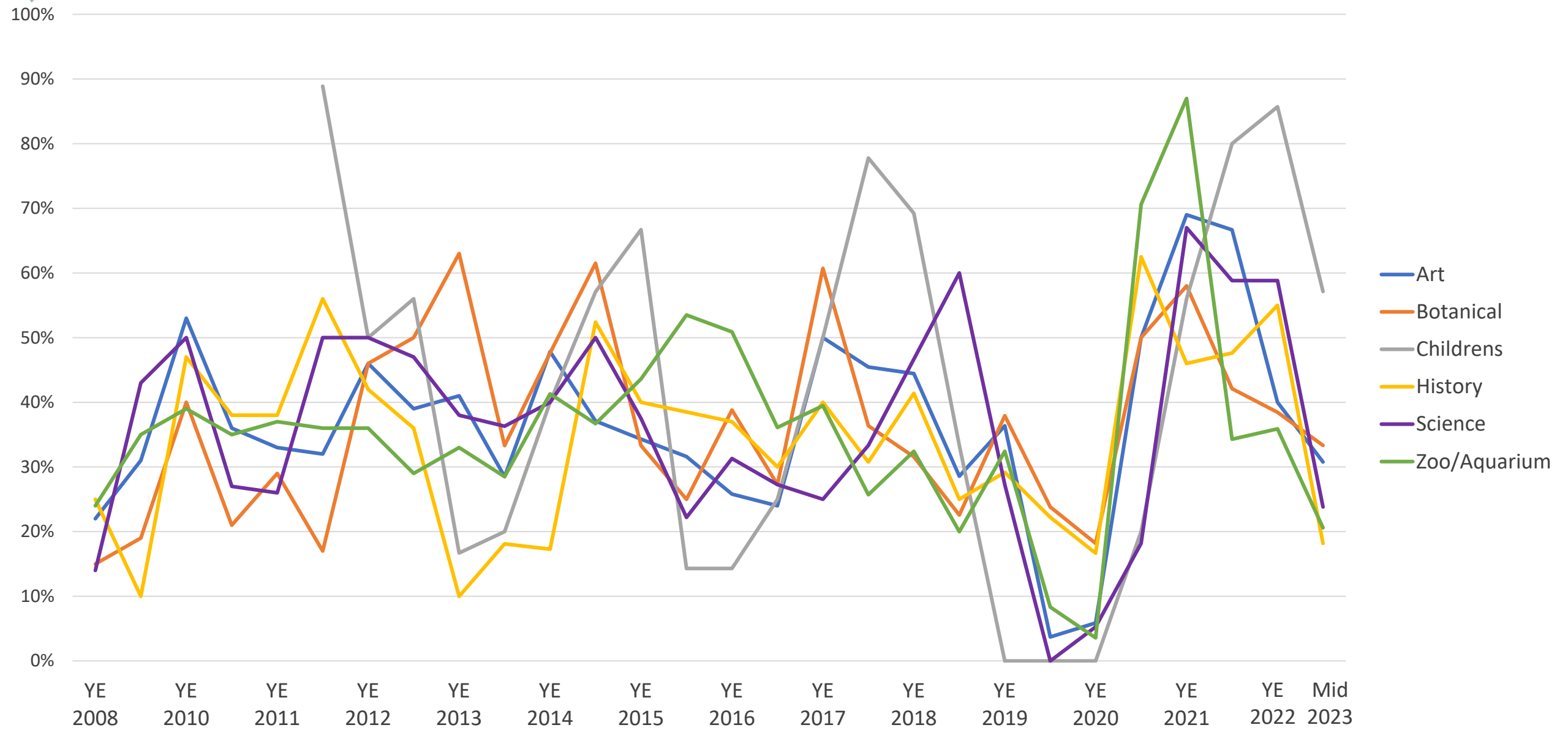


More new members this year than last year



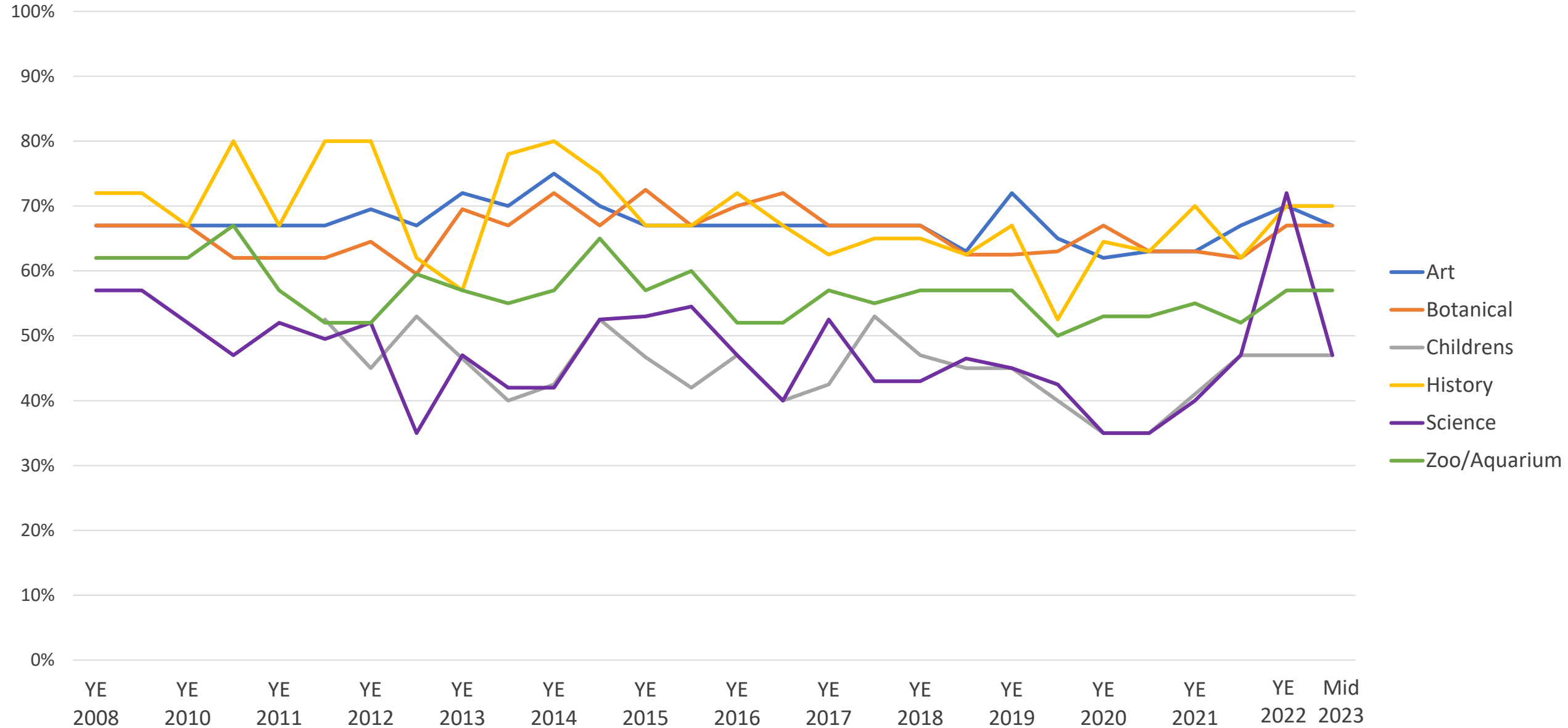


Renewal rates improved this year over last





Median Renewal Rate





Highlights – Zoos and Aquariums

Mid-Year 2023

- Reported *increase*
 - 44% membership totals
 - 51% revenues
 - 29% expenditure budgets
 - 40% new members
 - 55% visitation
 - 21% renewals
- Median Renewal Rate = 57%

Mid-Year 2022

- Reported *increase*
 - 47% membership totals
 - 45% revenues
 - 38% expenditure budgets
 - 37% new members
 - 34% visitation
 - 34% renewals
- Median Renewal Rate = 52%



Highlights – Gardens and Arboreta

Mid-Year 2023

- Reported *increase*
 - 41% membership totals
 - 58% revenues
 - 40% expenditure budgets
 - 38% new members
 - 52% visitation
 - 33% renewals
- Median Renewal Rate = 67%

Mid-Year 2022

- Reported *increase*
 - 56% membership totals
 - 60% revenues
 - 40% expenditure budgets
 - 33% new members
 - 47% visitation
 - 42% renewals
- Median Renewal Rate = 62%



Highlights – Art Museums

Mid-Year 2023

- Reported *increase*
 - 60% membership totals
 - 77% revenues
 - 37% expenditure budgets
 - 47% new members
 - 56% visitation
 - 31% renewals
- Median Renewal Rate = 67%

Mid-Year 2022

- Reported *increase*
 - 80% membership totals
 - 80% revenues
 - 64% expenditure budgets
 - 56% new members
 - 64% visitation
 - 67% renewals
- Median Renewal Rate = 67%



Highlights – Science Museums

Mid-Year 2023

- Reported *increase*
 - 60% membership totals
 - 56% revenues
 - 38% expenditure budgets
 - 36% new members
 - 62% visitation
 - 24% renewals
- Median Renewal Rate = 47%

Mid-Year 2022

- Reported *increase*
 - 67% membership totals
 - 83% revenues
 - 44% expenditure budgets
 - 89% new members
 - 94% visitation
 - 59% renewals
- Median Renewal Rate = 47%



Highlights – Children’s Museums

Mid-Year 2023

- Reported *increase*
 - 75% membership totals
 - 88% revenues
 - 57% expenditure budgets
 - 50% new members
 - 67% visitation
 - 57% renewals
- Median Renewal Rate = 47%

Mid-Year 2022

- Reported *increase*
 - 73% membership totals
 - 73% revenues
 - 55% expenditure budgets
 - 100% new members
 - 80% visitation
 - 80% renewals
- Median Renewal Rate = 47%



Highlights – History Museums

Mid-Year 2023

- Reported *increase*
 - 42% membership totals
 - 42% revenues
 - 38% expenditure budgets
 - 42% new members
 - 67% visitation
 - 18% renewals
- Median Renewal Rate = 70%

Mid-Year 2022

- Reported *increase*
 - 50% membership totals
 - 50% revenues
 - 27% expenditure budgets
 - 55% new members
 - 57% visitation
 - 48% renewals
- Median Renewal Rate = 62%

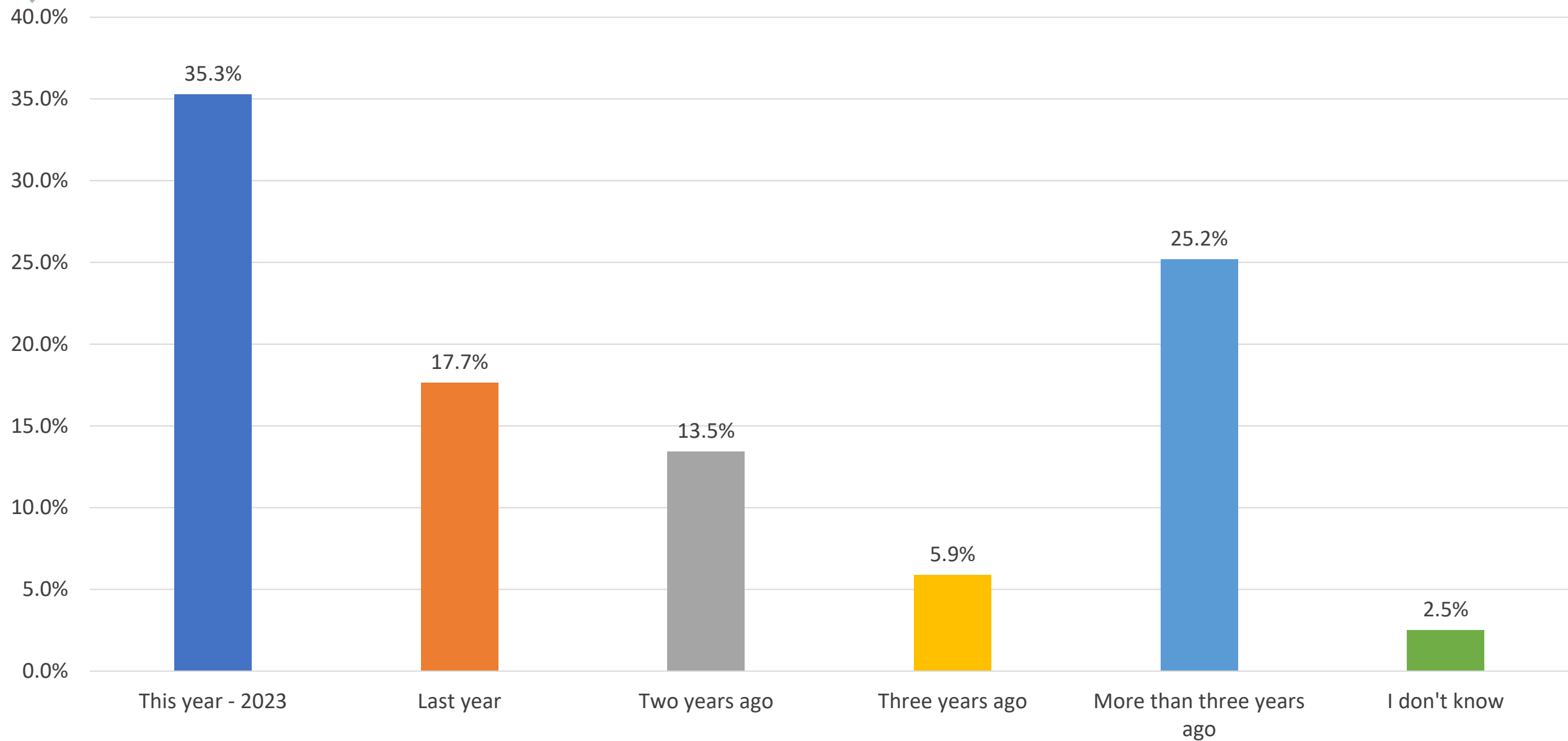


Dues, Categories and Benefits

Pulse 2023 Mid-Year Data

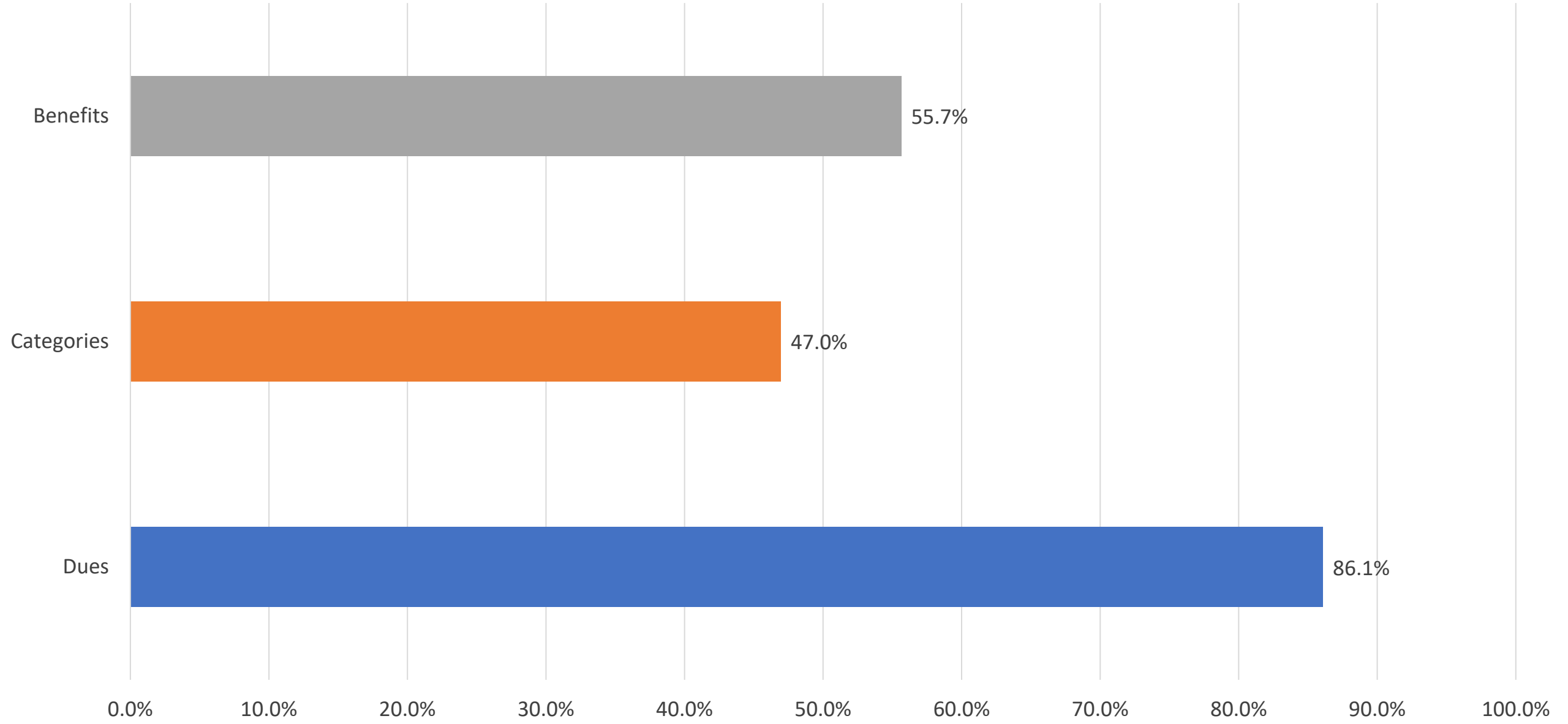


When was the last time your organization changed your dues, categories, or benefit offerings?



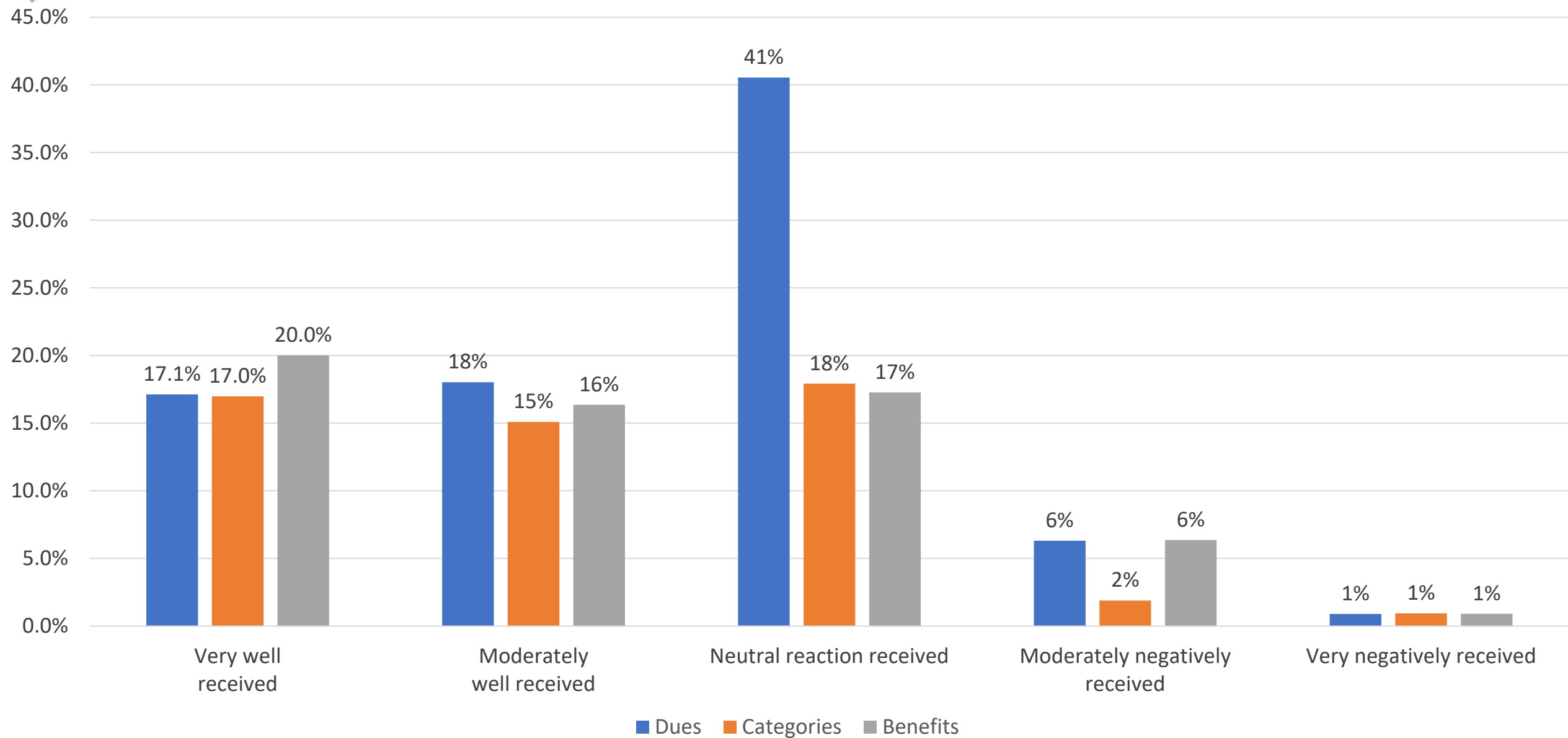


When you made these changes, what aspects did you change?



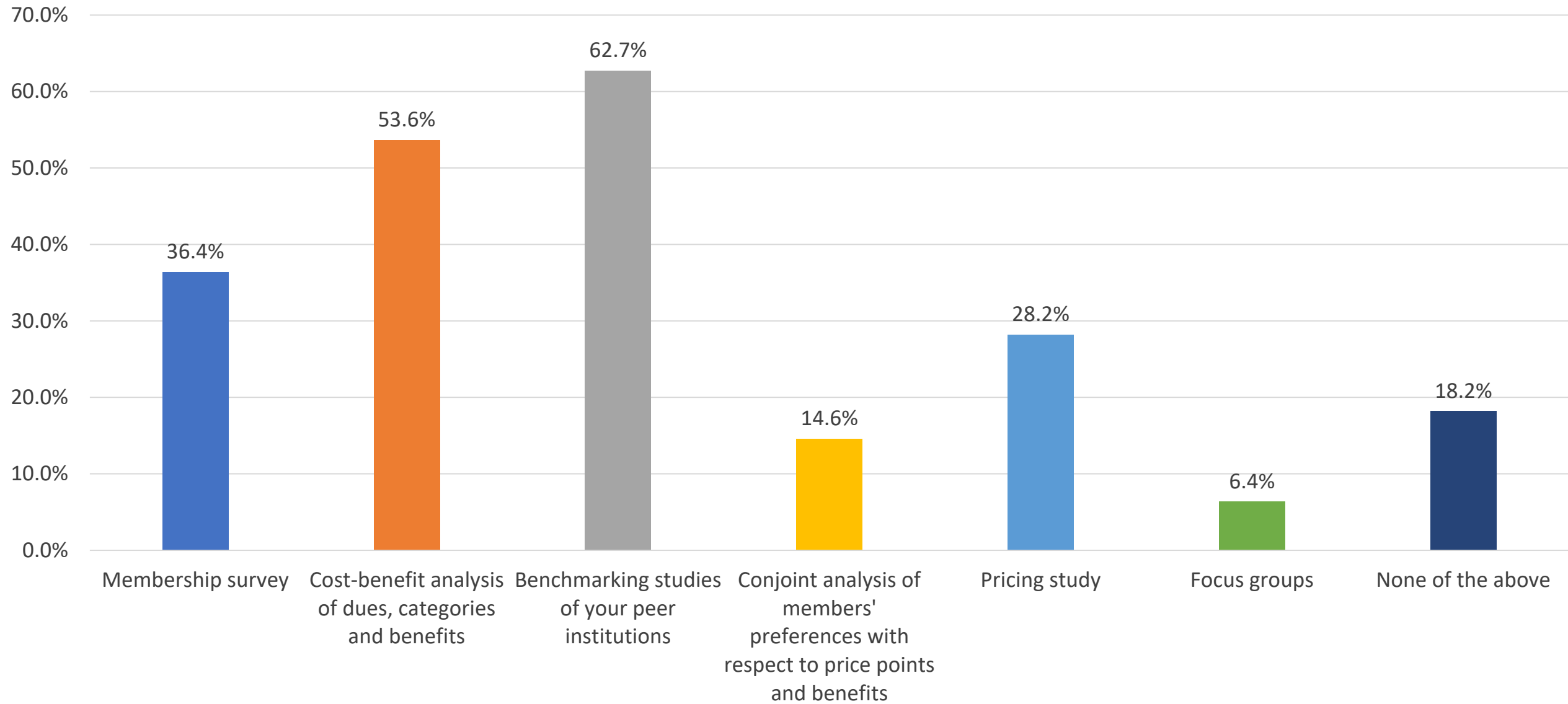


In changing dues, categories, and/or benefits, how well were the changes received by your members?





Before making changes to dues, categories, and/or benefits, did you use any of the following tools or research?



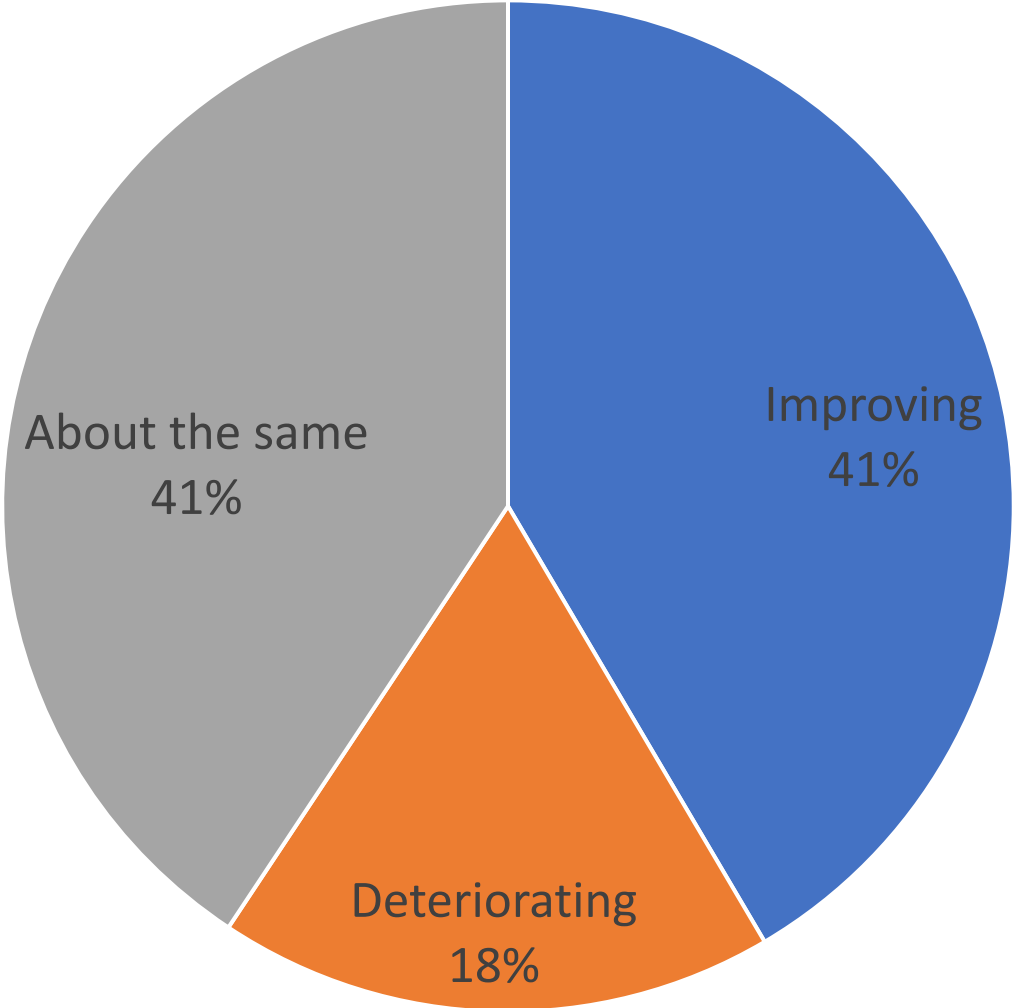


Membership Forward

Pulse 2023 Mid-Year Data

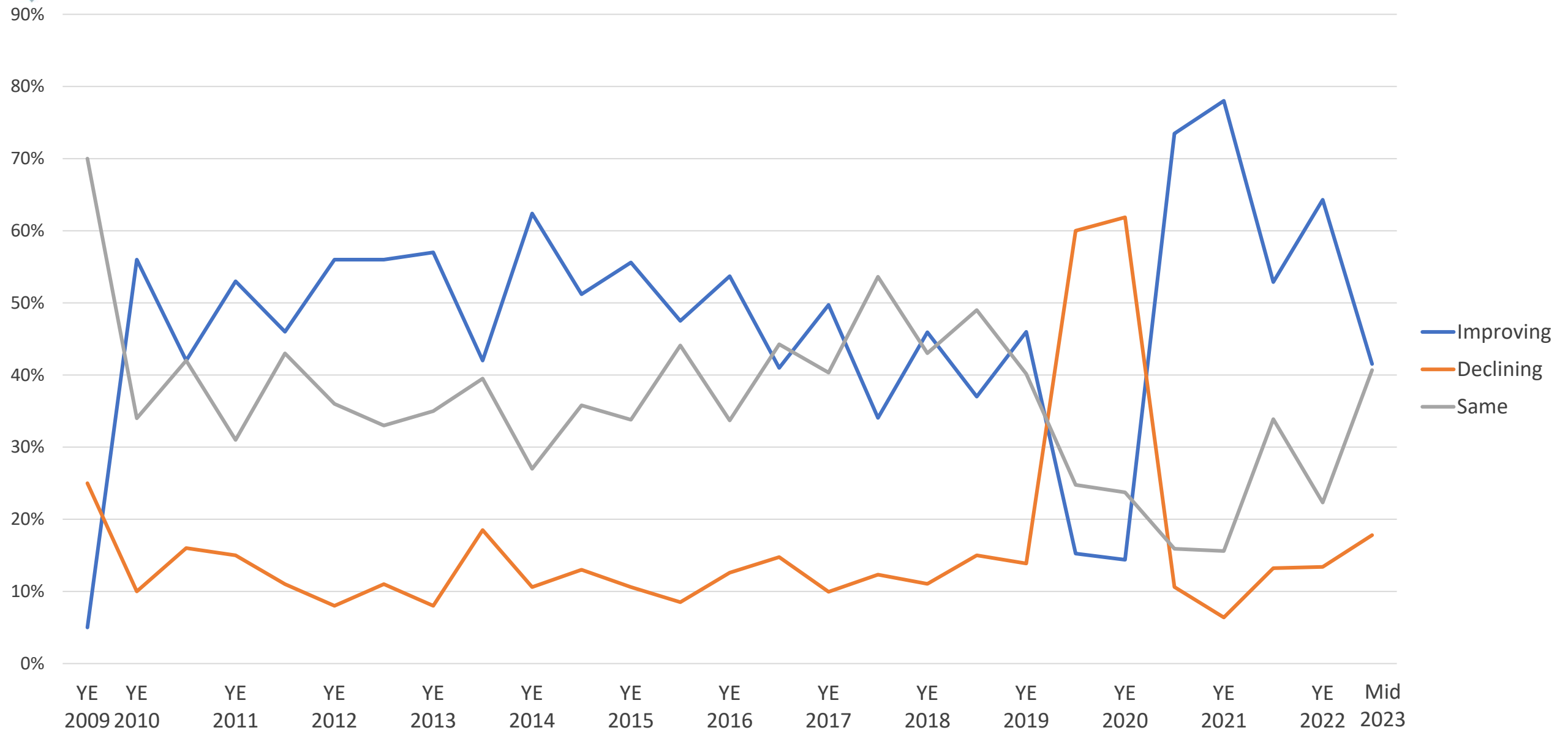


In your professional opinion, comparing 2023 to 2022, the membership climate is...





Membership Future Outlook





Best Practices

- Continue to increase digital efforts for all areas of membership
- For acquisition, use a mix of on-site, direct mail, email, and digital channels; find ways to address any on-site challenges
- Renewals should include snail mail AND email; add Facebook & digital touches when possible
- Email stand alone membership promotions monthly to new prospects; utilize new email addresses collected from online reservations
- Increase usage of website & digital platform reporting & analytics to drive decisions
- Allocate and increase dedicated budget for digital marketing
- Empower membership staff to be proactive on social media channels (i.e., distributed authorship)
- Utilize digital card options



Going Forward ...

- Stay positive!
- Keep fighting for your budget
- Work with Marketing
- Communicate with lapsed members more often
- Continue with plans for dues increases, category changes
- Stick to what works!
 - Combining direct mail, email and digital communications and promotions for new and renewing members



MEMBERSHIP
CONSULTANTS

Questions?

Thank you!

info@membership-consultants.com

www.membership-consultants.com



Stay in Touch!



Dana Hines

Dana@Membership-Consultants.com



Tabetha Pund

Tabetha@Membership-Consultants.com