



MEMBERSHIP
CONSULTANTS
AN OSG COMPANY

Pulse of Membership Survey Recap

2020 MID-YEAR SURVEY RESULTS

AND

MEMBERSHIP TRENDS



Introductions



- Dana Hines
 - Vice President, Membership Marketing



- Meg Carosello
 - Digital & Social Media Director, Captiva Marketing



- Tabetha Pund
 - Account Manager, Strategic Planning




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!



Covid-19 Membership Impact Survey Recap



Covid-19 Survey Recap – Oct 1

- 94% experienced a closure
- 73% opened, 10% still closed, 15% partially closed

	Members	Revenues	Budgets	Renewals
Increased	38%	10%	1%	11%
Decreased	38%	77%	64%	67%
Same	14%	8%	27%	7%
Unsure	10%	5%	9%	15%



Covid-19 Survey Recap – Oct 1

<i>Acquisition</i>	Direct Mail	Email	Digital
As Planned	25%	37%	19%
Delayed	27%	22%	15%
Canceled	15%	6%	31%
Had No Plans	26%	17%	5%

<i>Renewals</i>	
As Usual	60%
Limited Basis	12%
Only Email	19%
Only Mail	1%
No renewals	6%
Reopened & on Track	19%
Reopened, Not on Track	3%

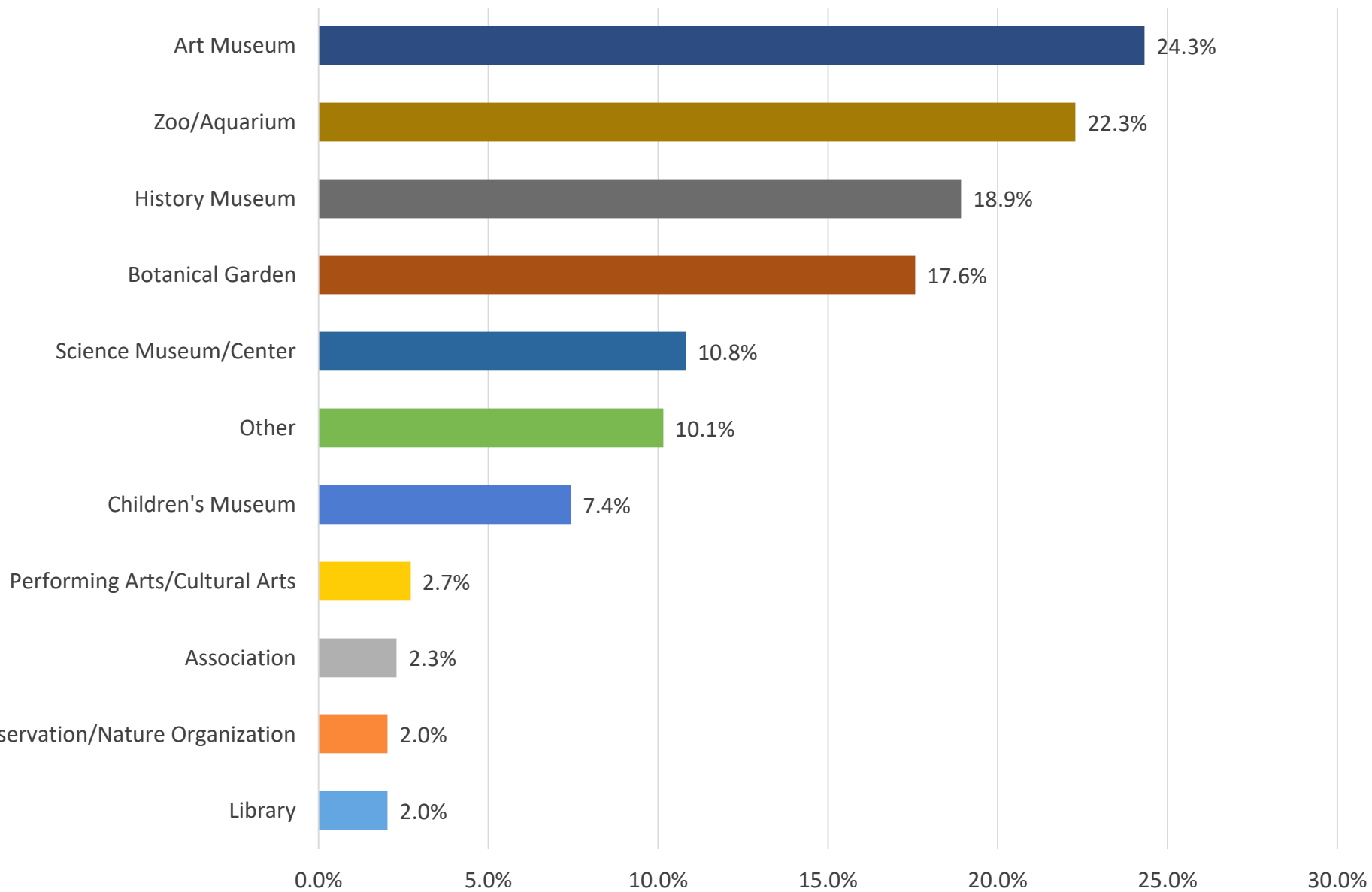


Demographics

Pulse 2020 Mid-Year Data

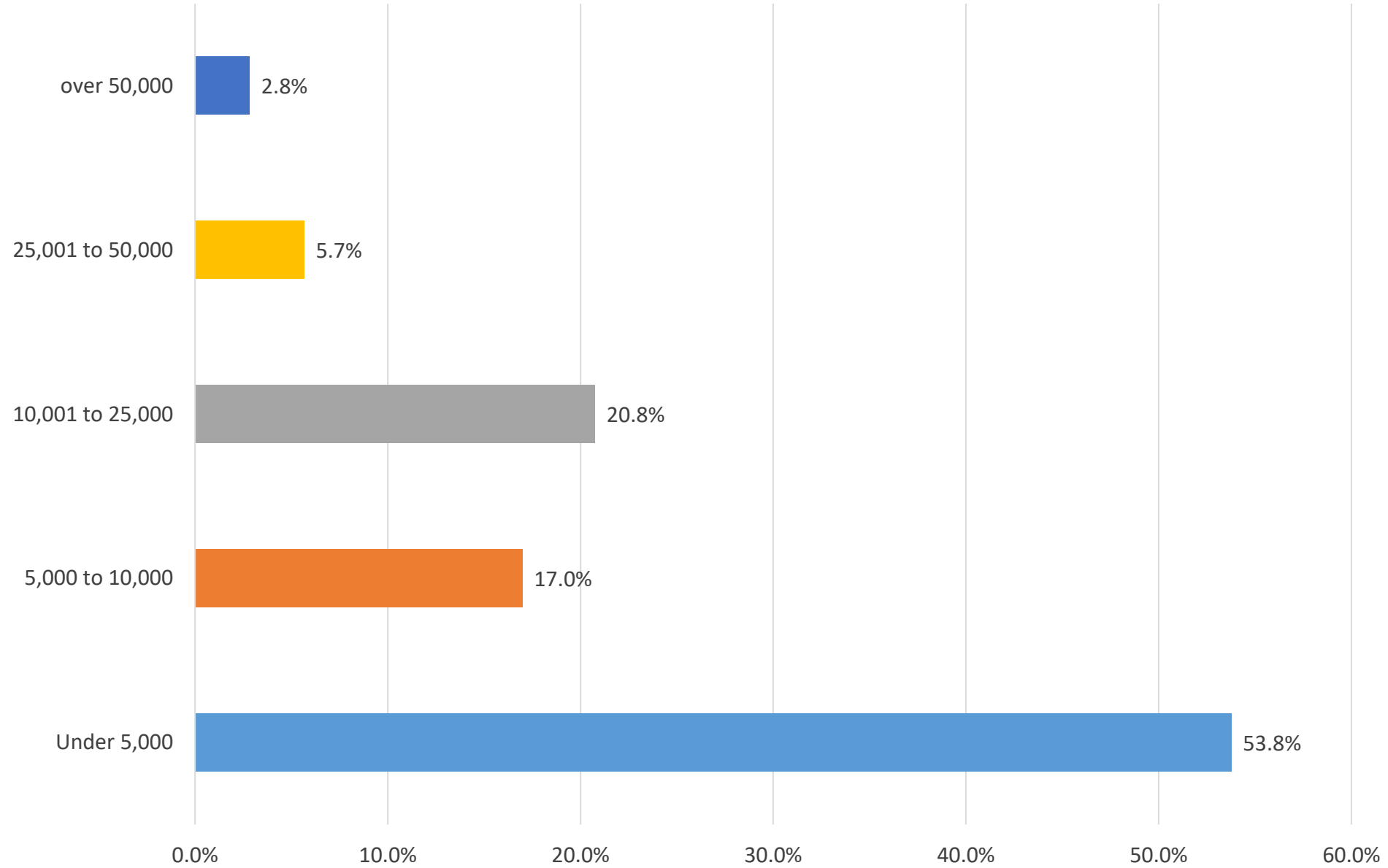


What type of organization does your membership serve?





How many members does your organization have?



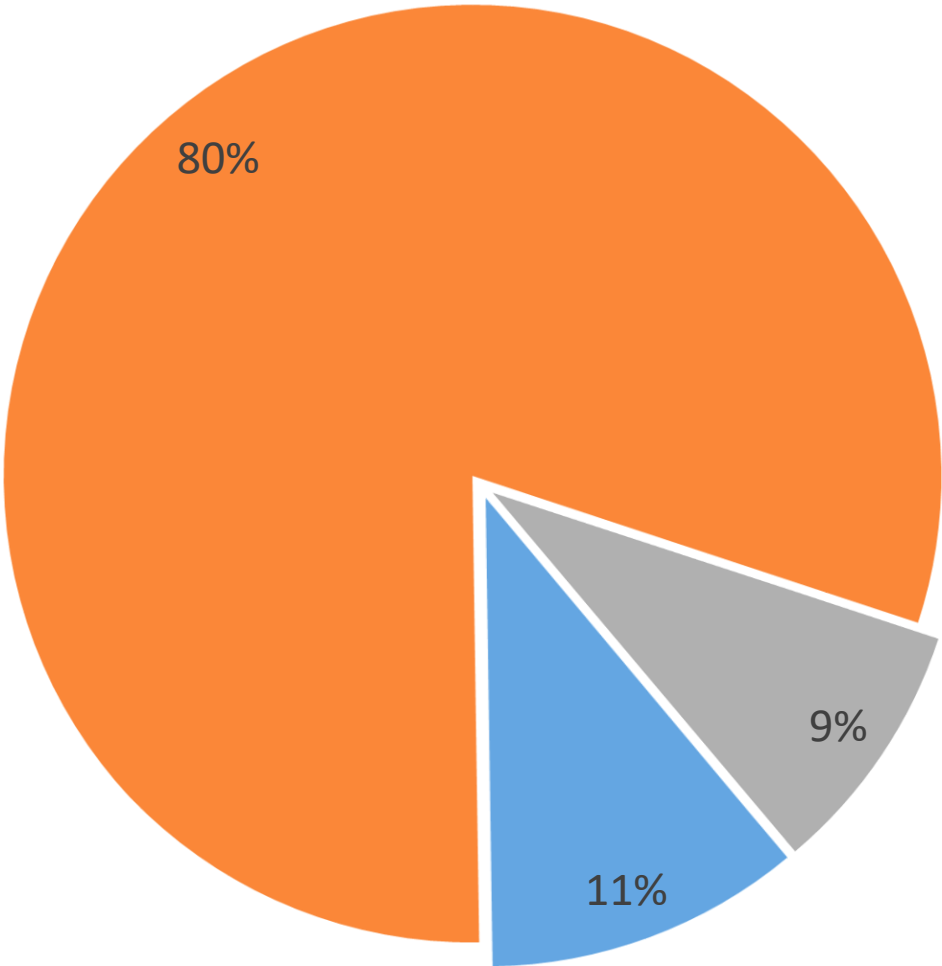


Trends

Pulse 2020 Mid-Year Data



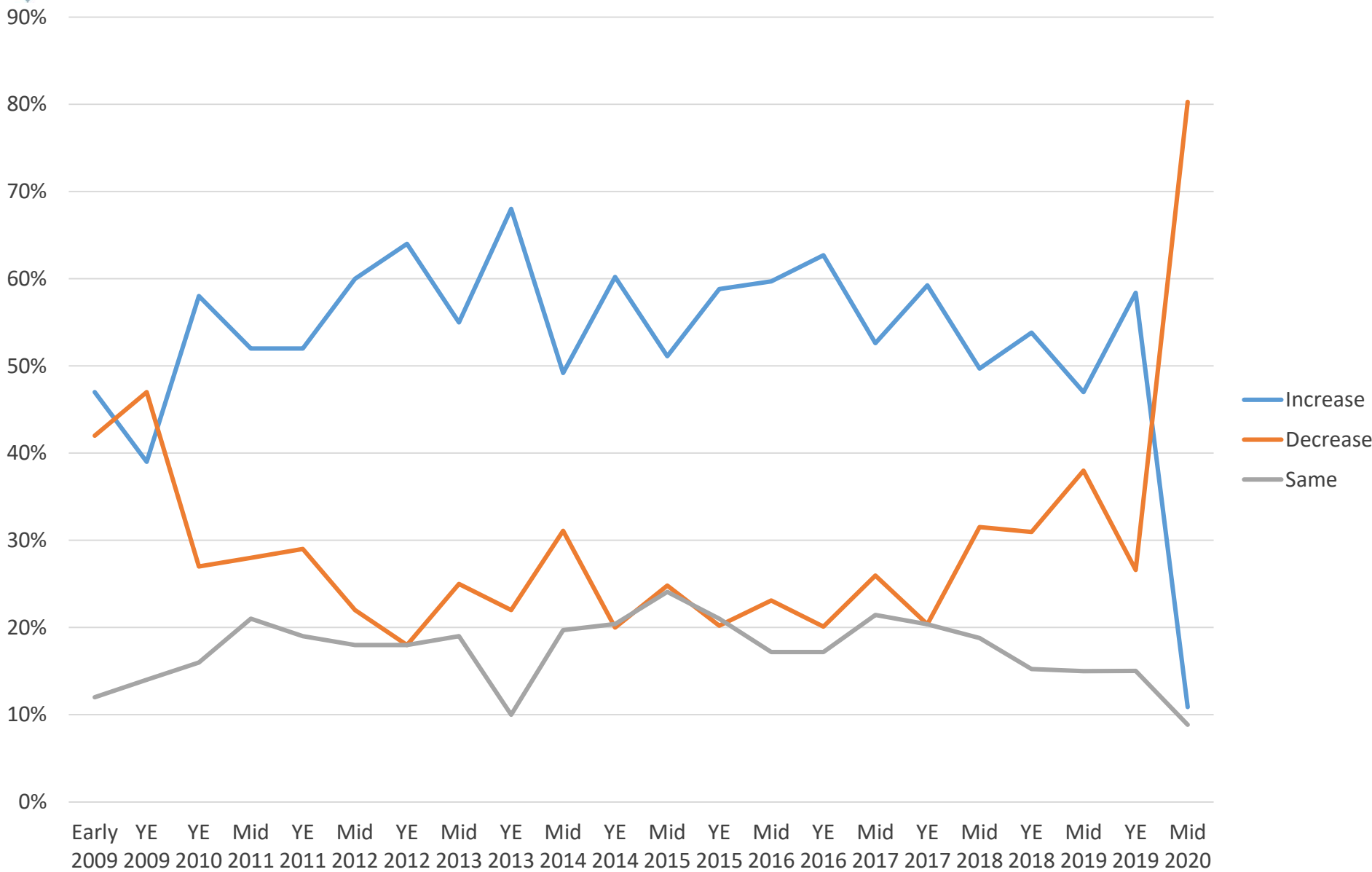
Comparing membership totals at mid-year this year to membership totals at mid-year last year, your membership ...



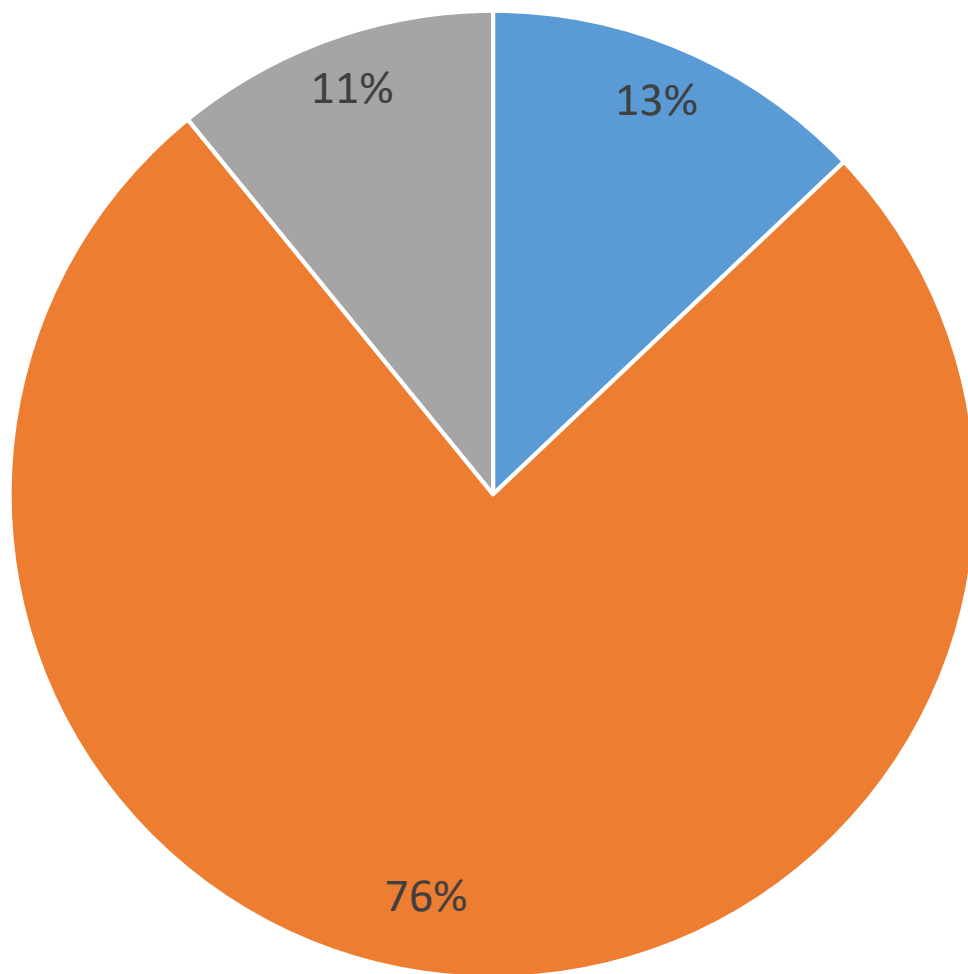
- Increased from the previous year.
- Decreased from the previous year.
- Stayed the same as the previous year.



Membership Totals from Year to Year



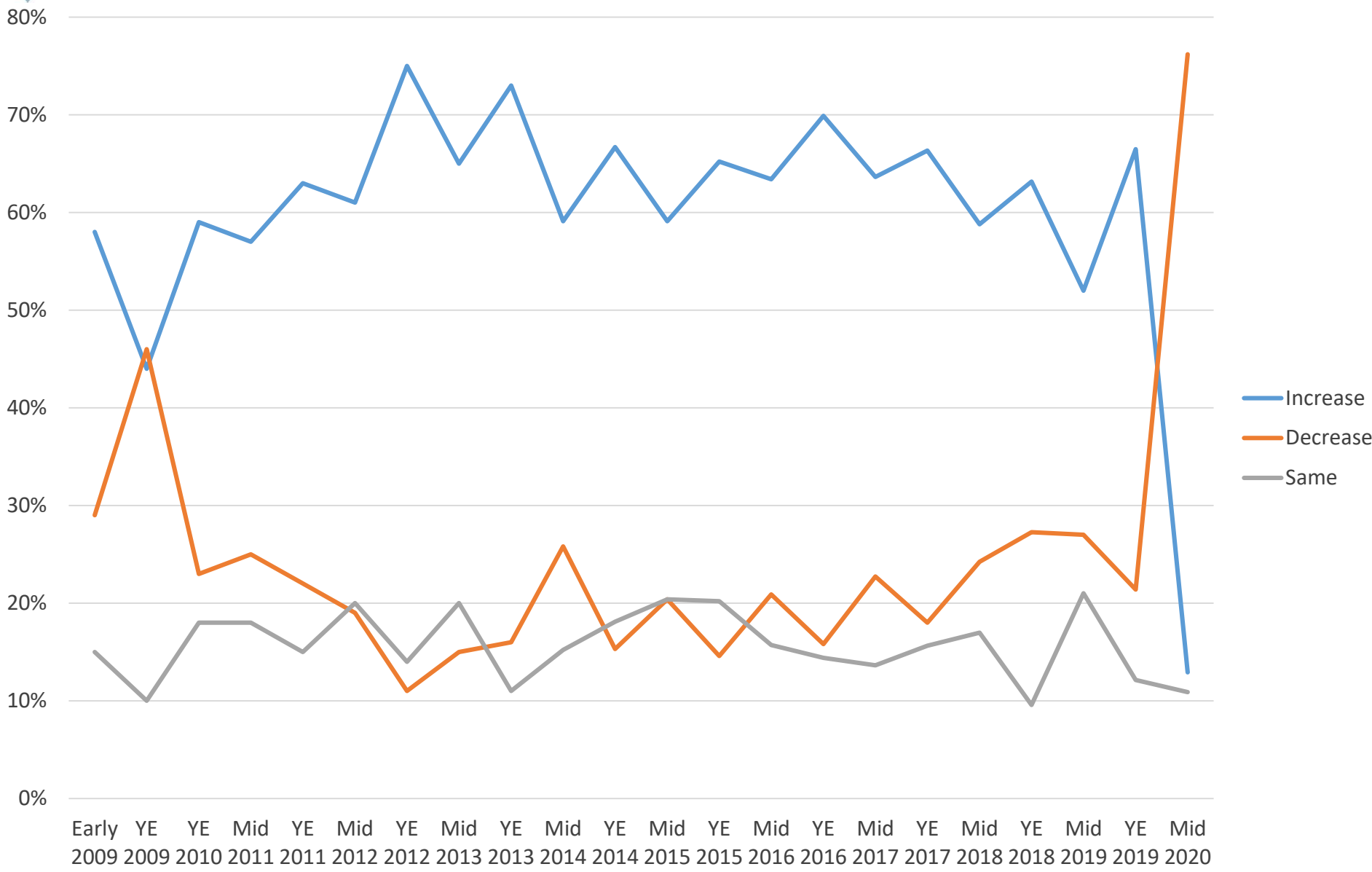
In comparing membership revenues at mid-year this year to membership revenues at mid-year last year, your membership revenues ...



- Increased over previous year's revenues.
- Decreased from previous year's revenues.
- Revenues are about the same as the previous year.

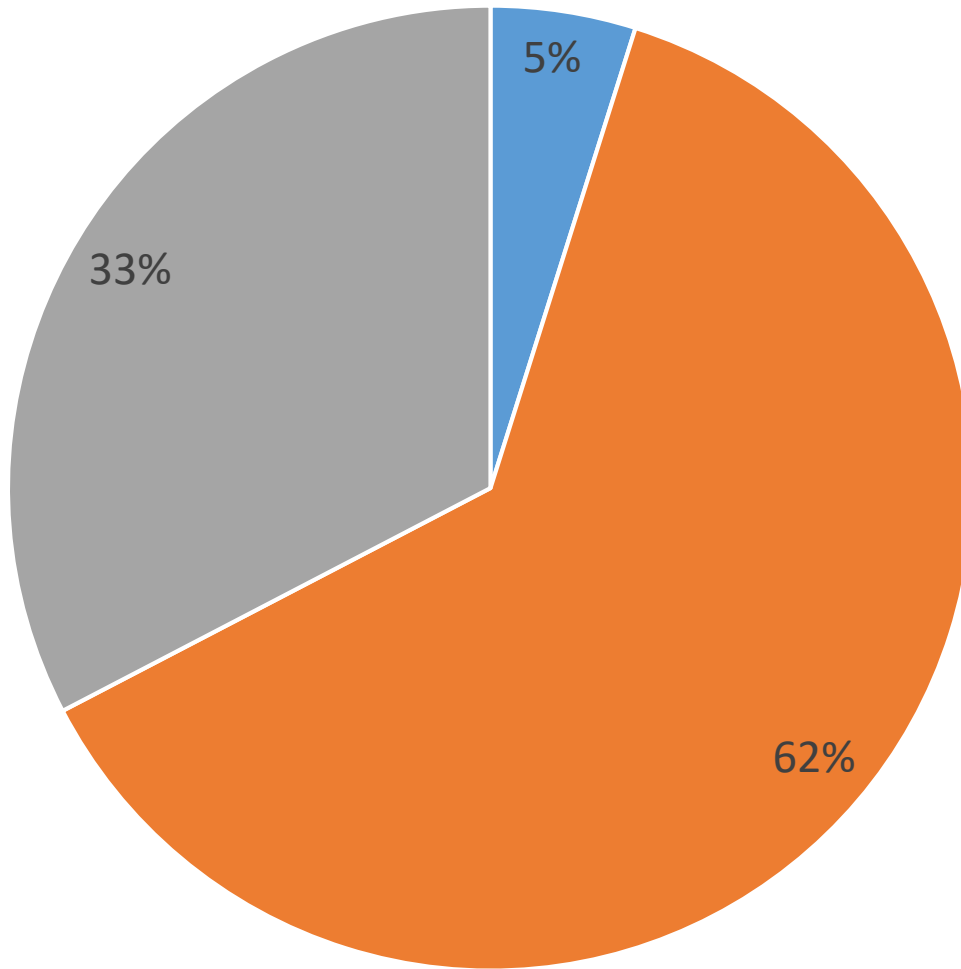


Membership Revenue





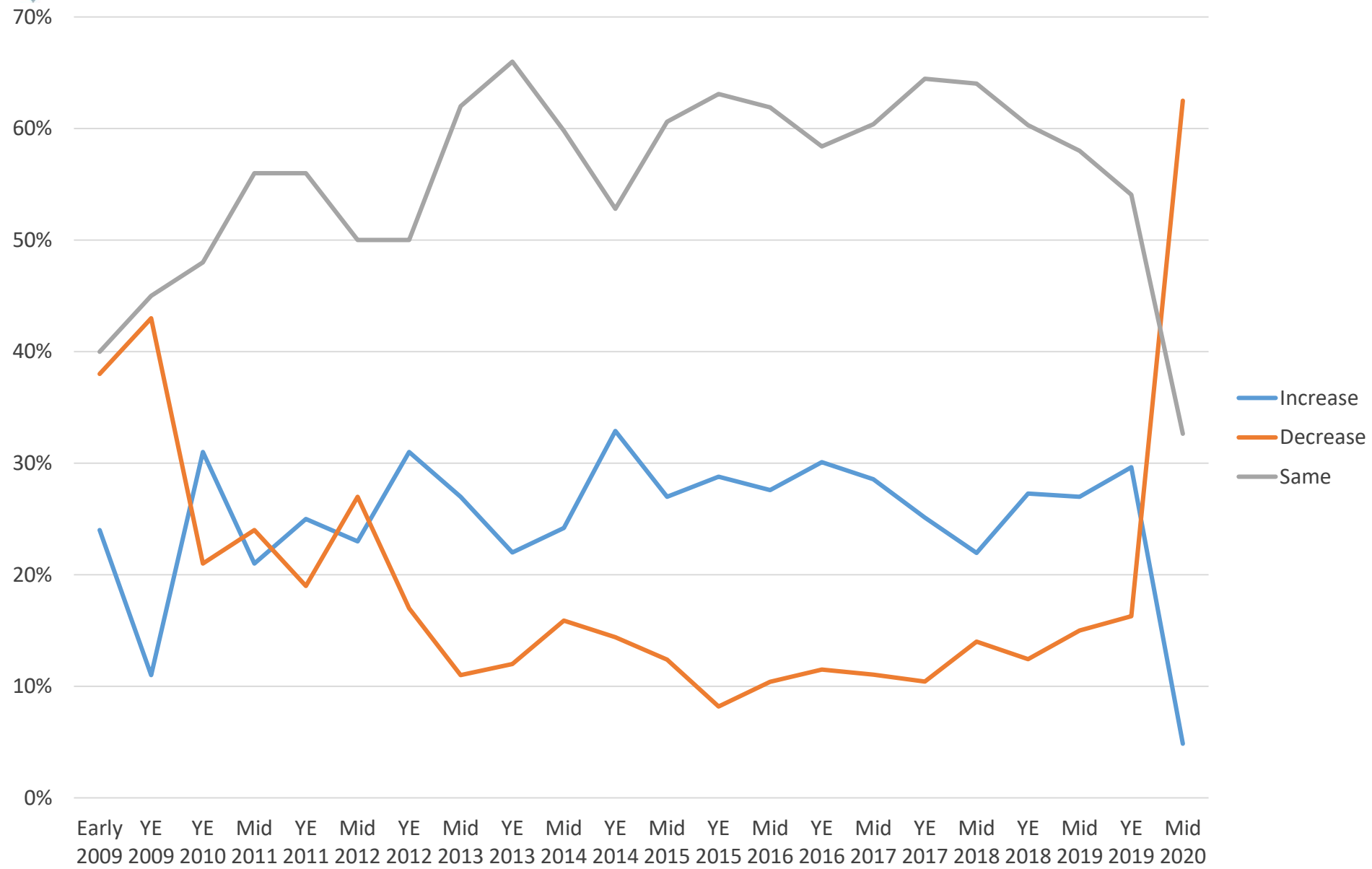
Comparing your membership expenditure budget for this year to the previous year's budget, your membership budget ...



- Increased over the previous year's budget.
- Decreased from the previous year's budget.
- Stayed about the same as the previous year's budget.

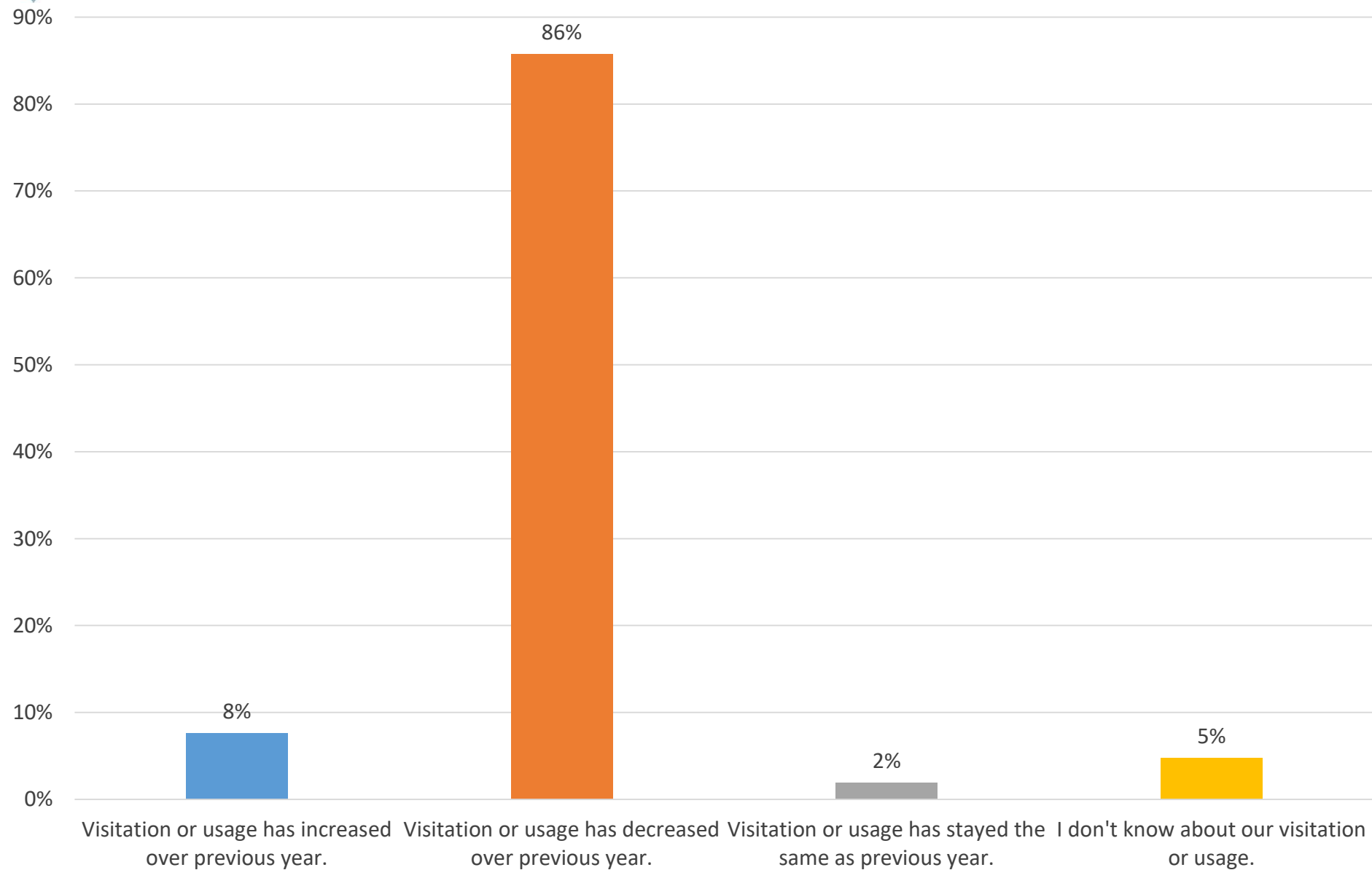


Membership Budget



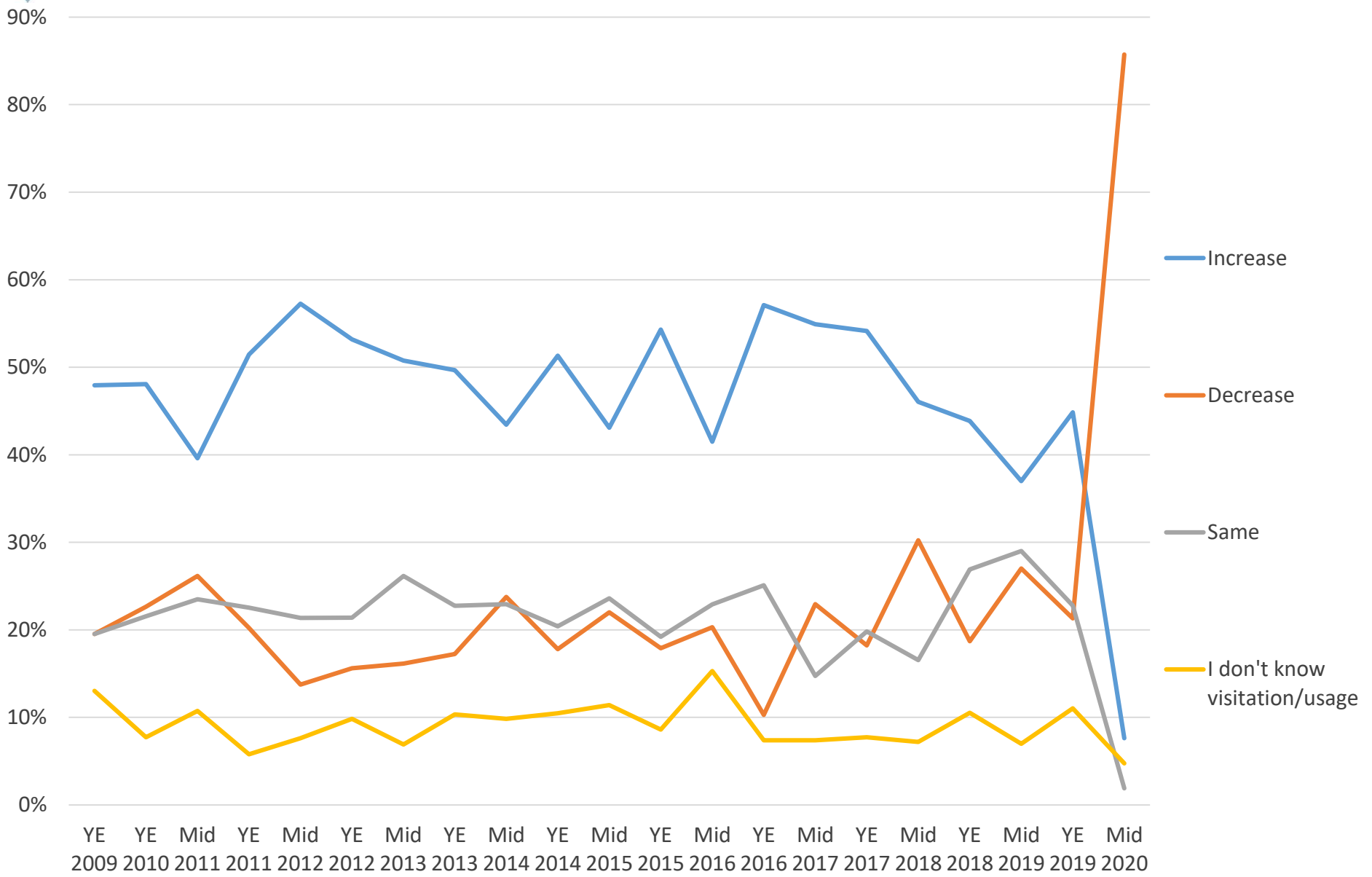


This year, visitation or usage patterns so far this year have ...





Visitation or Usage





Recap

- Membership Totals
 - 80% decrease
 - 11% said increase and 9% stayed the same
- Revenues
 - 76% decrease
 - 13% said increase and 11% stayed the same
- Expenditure Budgets
 - 62% decrease
 - 5% said increase and 33% stayed the same
- Visitation/Usage
 - 86% decrease
 - 8% said increase and 2% stayed the same

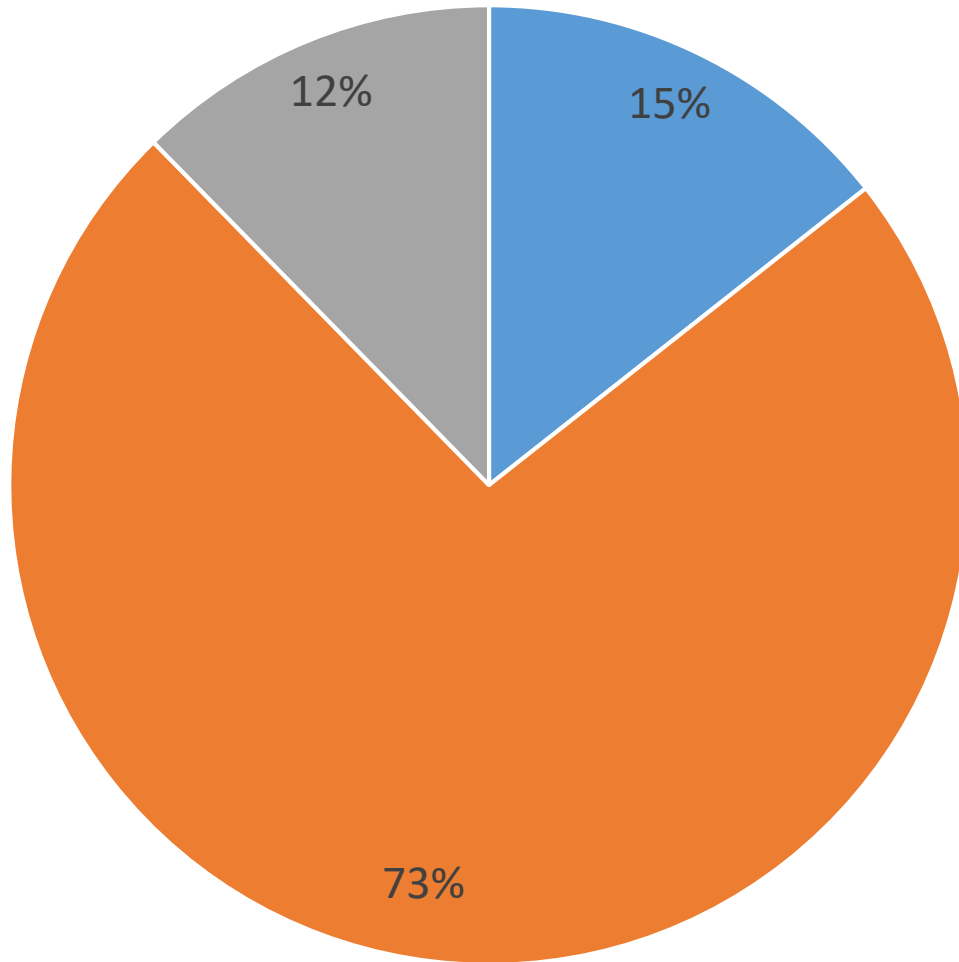


Trends – Acquisition

Pulse 2020 Mid-Year Data



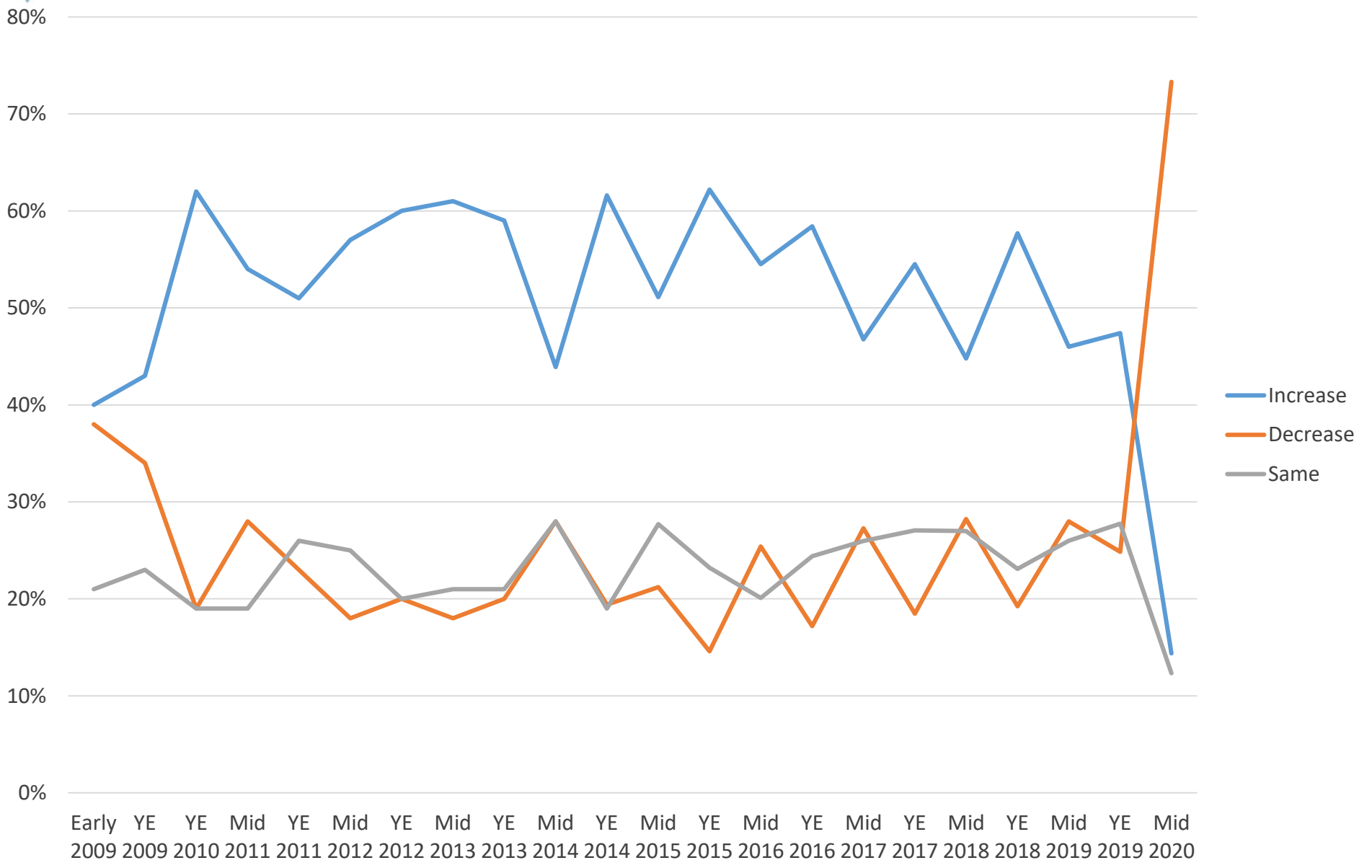
Comparing new members acquired thus far this year to new members acquired at this point last year, your membership acquisition efforts have ...



- Acquired more new members this year than last year.
- Acquired fewer new members this year than last year.
- Acquired about the same number of new members this year as last year.

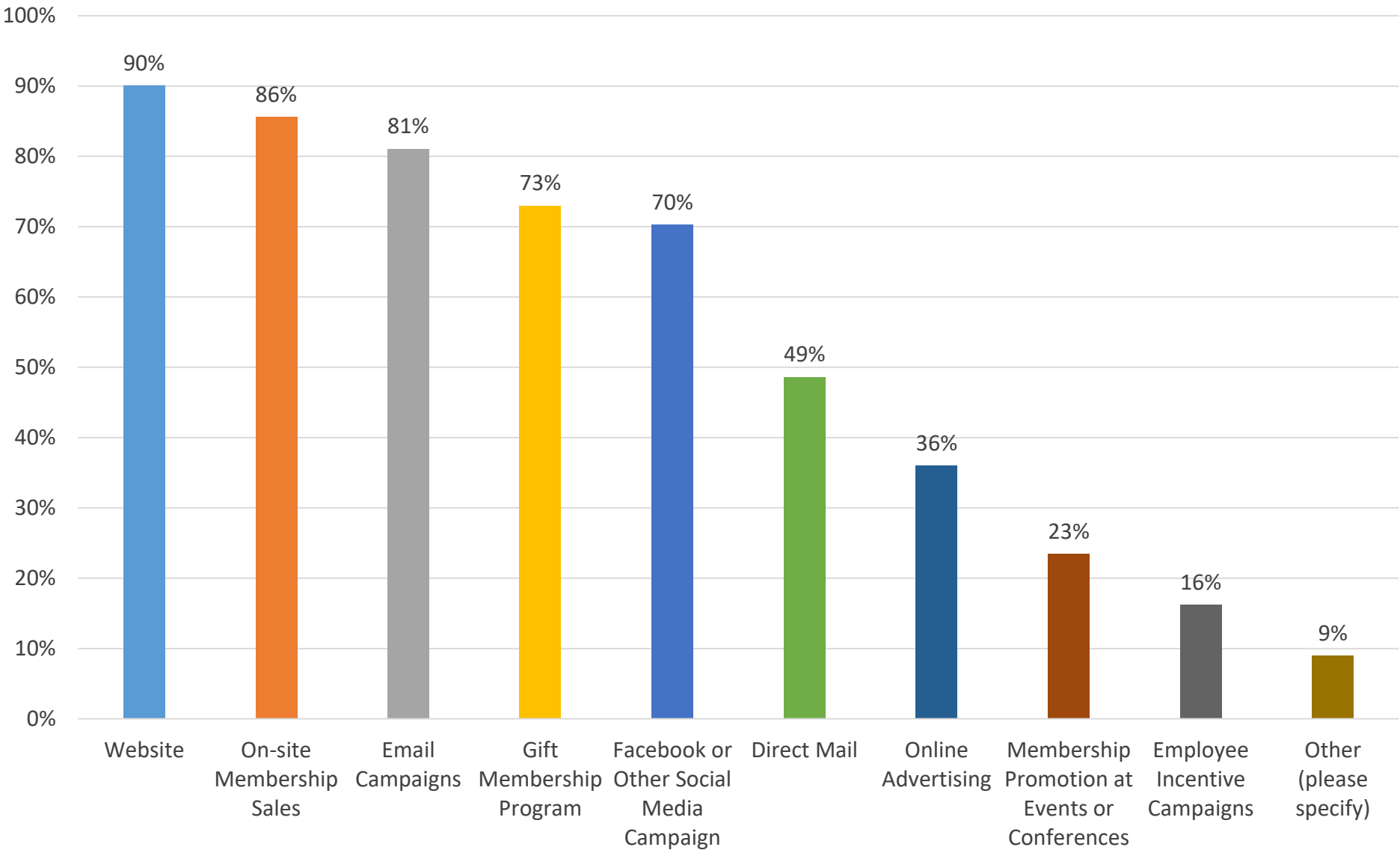


New Members Acquired



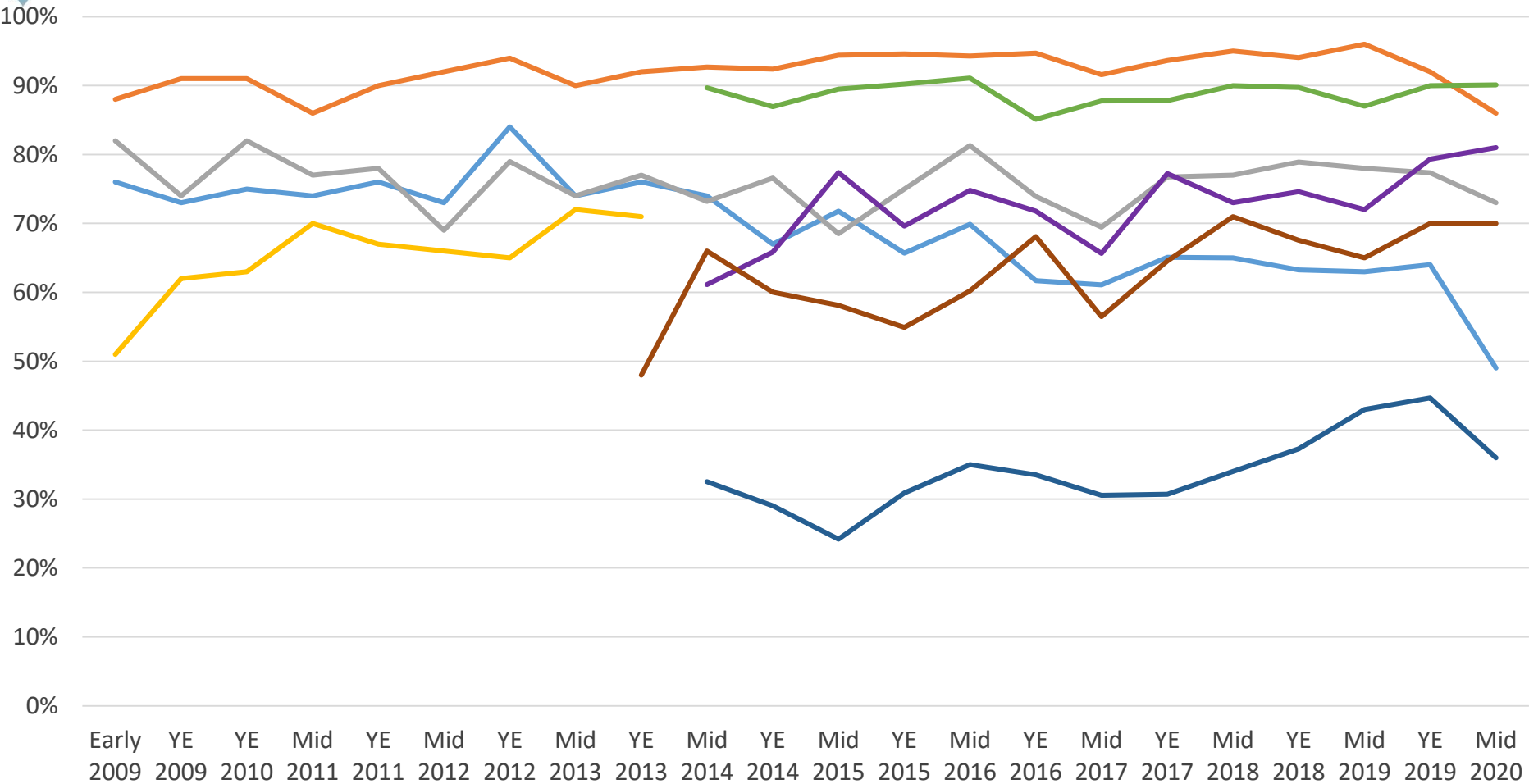


Membership Acquisition: Please select all of the means of acquiring new members that your program utilizes.





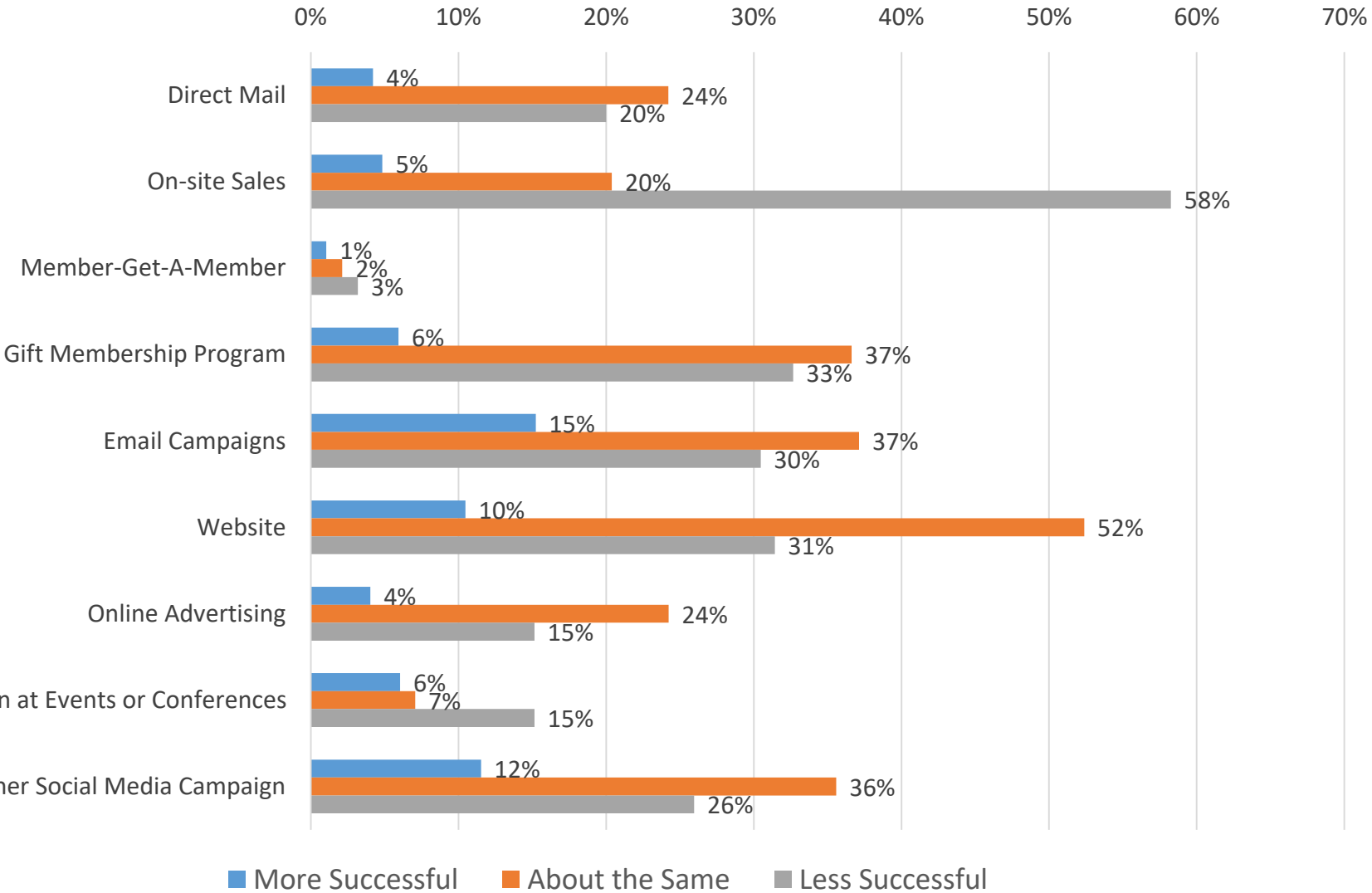
Acquisition Sources Used



- Direct Mail
- Gift Memberships Sales
- Email Campaigns
- Online Advertising
- On-site Sales
- Online
- Website
- Facebook or Other Social Media Campaign



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





Recap – Acquisition Methods

- New Members
 - 73% decrease
 - 14% said increase and 12% staying the same
- Top 5 Acquisition Methods
 1. Website (*beat out on-site sales first time*)
 2. On-Site Membership Sales
 3. Email Campaigns
 4. Gift Membership Program
 5. Facebook or Other Social Media Campaign

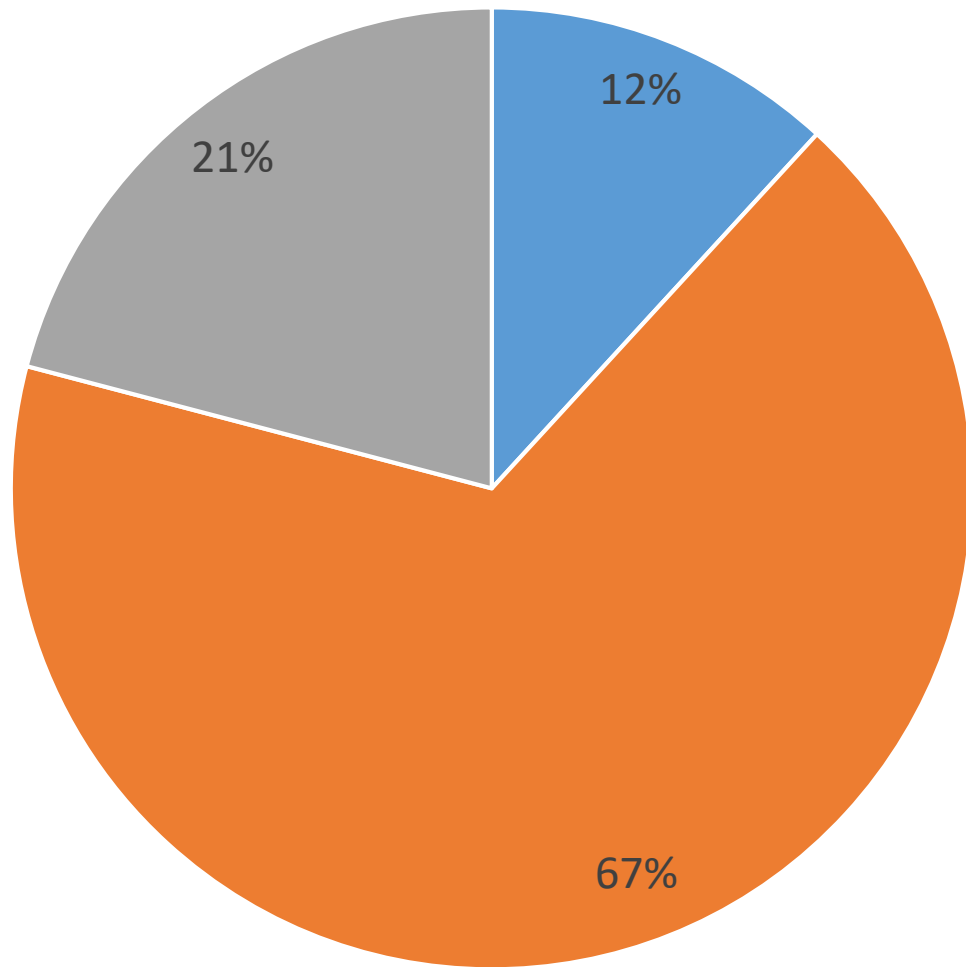


Trends – Renewals

Pulse 2020 Mid-Year Data



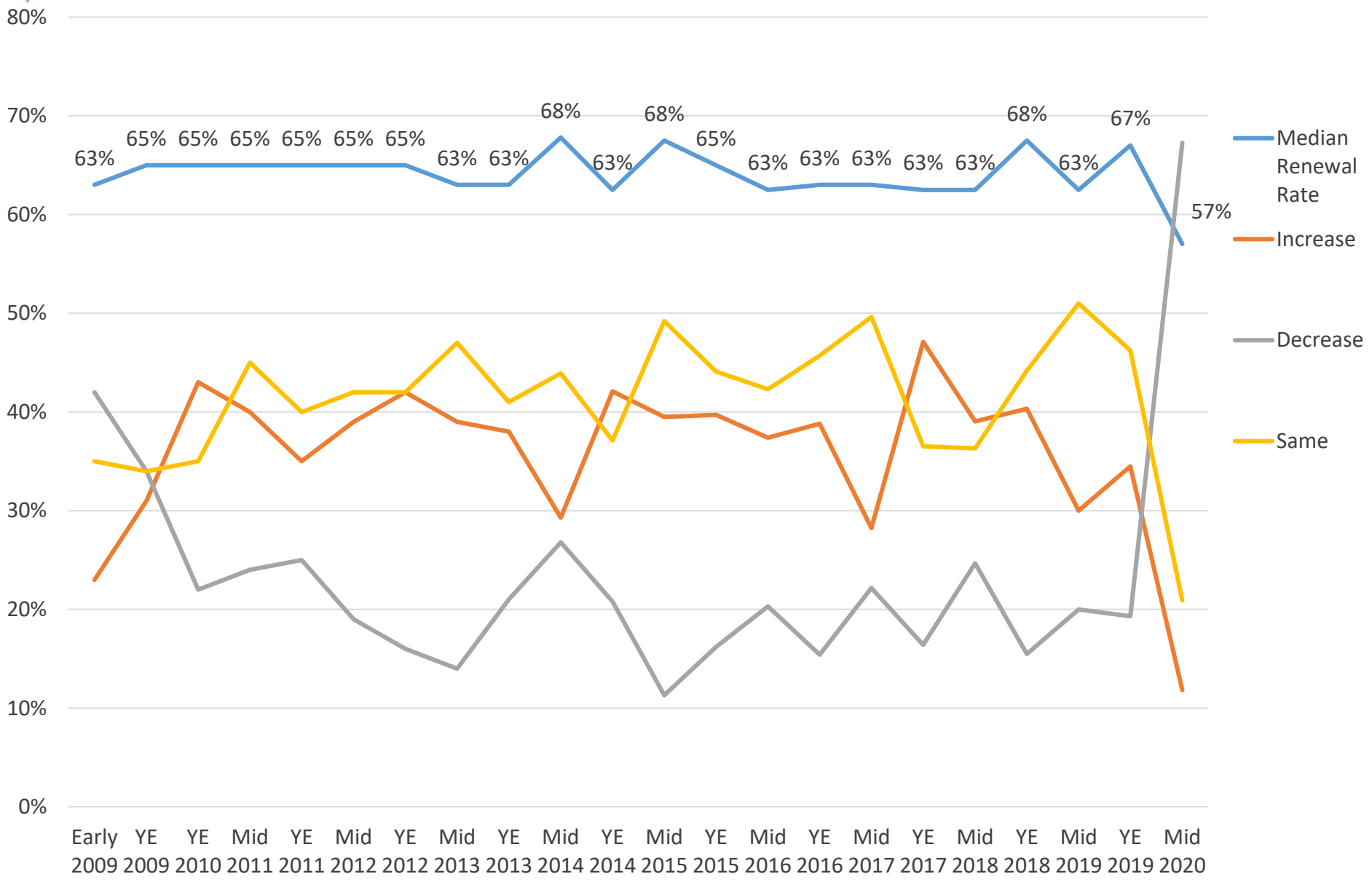
Comparing membership renewal rates thus far this year to rates at this point last year, would you say that renewal rates ...



- Improved from previous year.
- Declined from previous year.
- Renewal rates were about the same as the previous year.

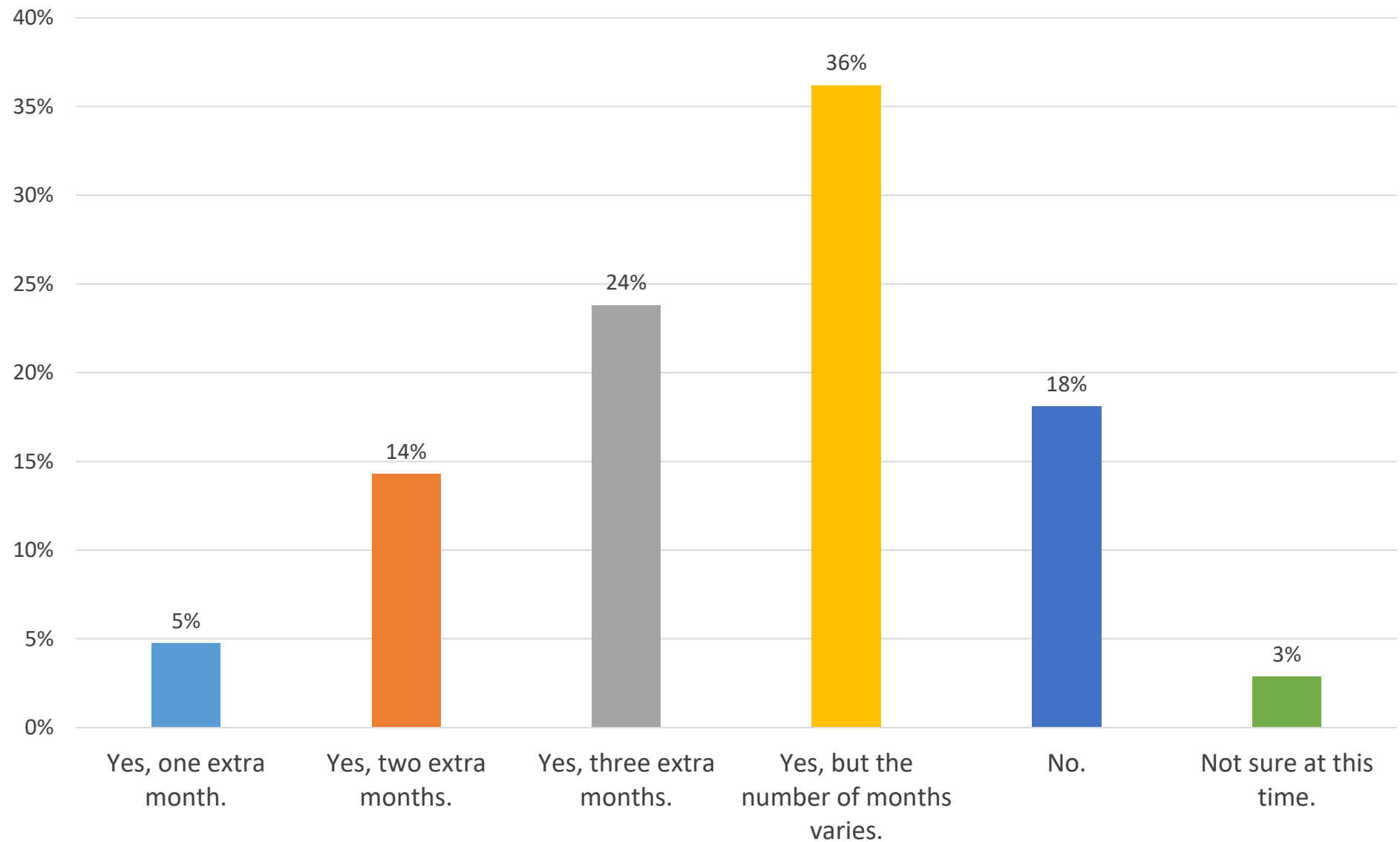


Renewal Rates



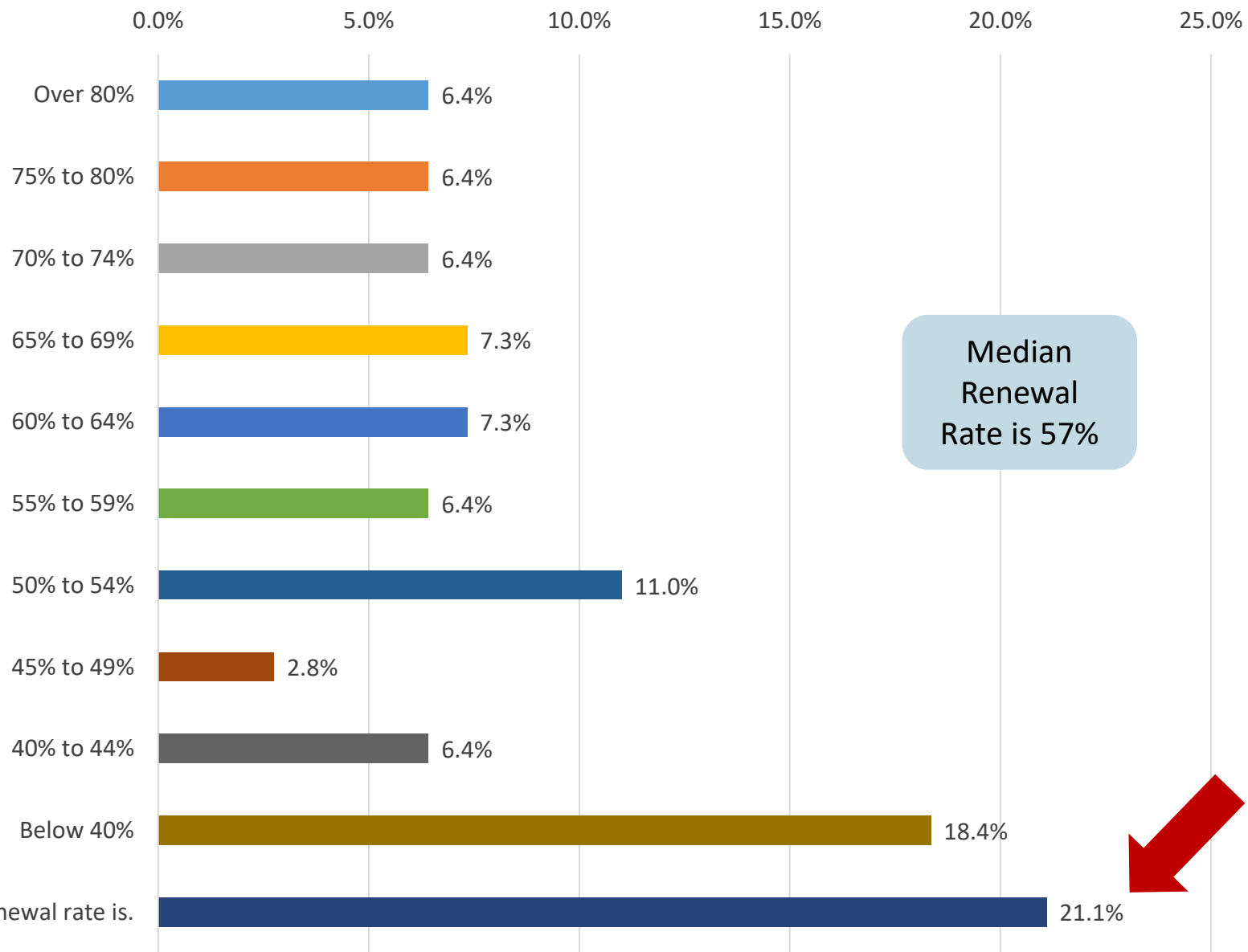


Due to the **Covid-19** pandemic, have you offered or will you be offering members additional months of membership?





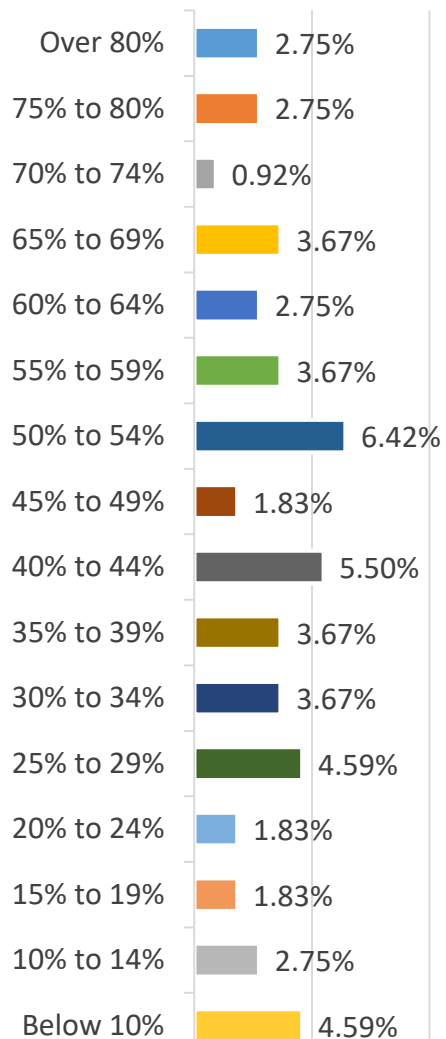
What is your membership renewal rate?





What is your first-year member renewal rate?

0.00% 5.00% 10.00% 15.00% 20.00% 25.00% 30.00% 35.00% 40.00% 45.00% 50.00%



Median First-Year Renewal Rate is 42%

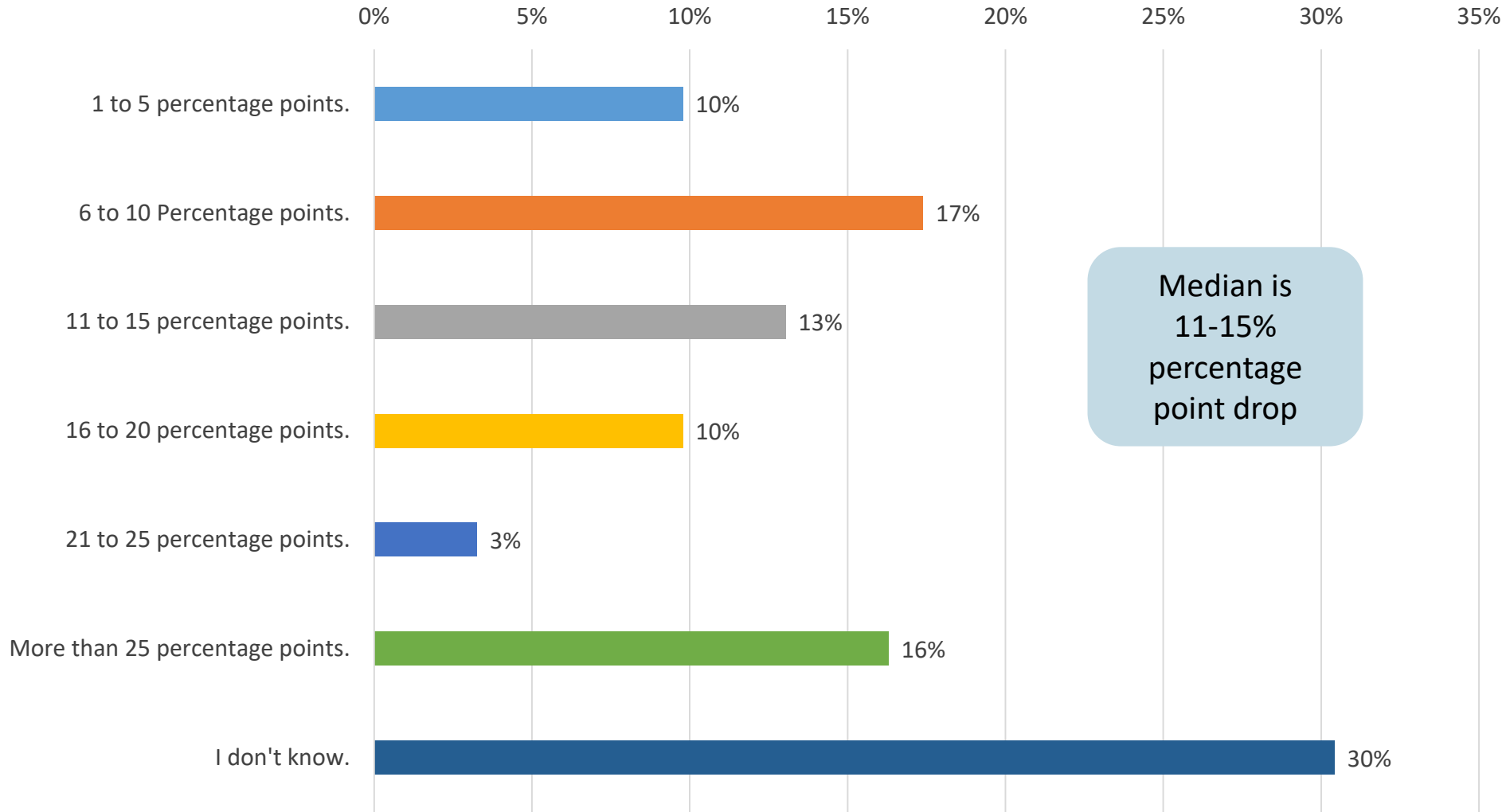


I don't know what the first-year renewal rate is.

46.79%

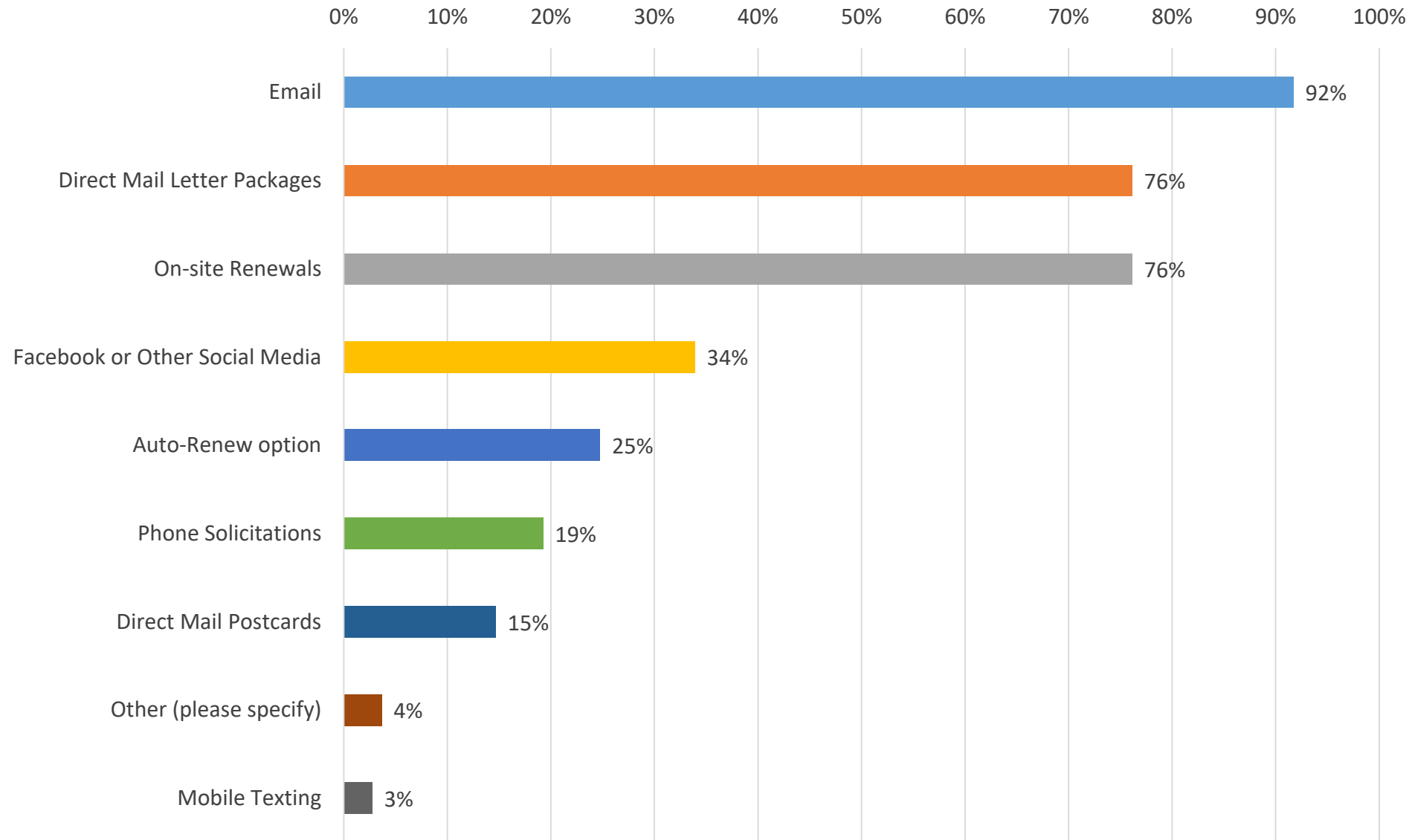


If you reported a decline in renewal rates due to the **Covid-19** pandemic and closures, how many percentage points did your renewal rate decline? (E.g. a decrease from a 60% renewal rate to a 55% renewal rate is a decline of 5 percentage points.)



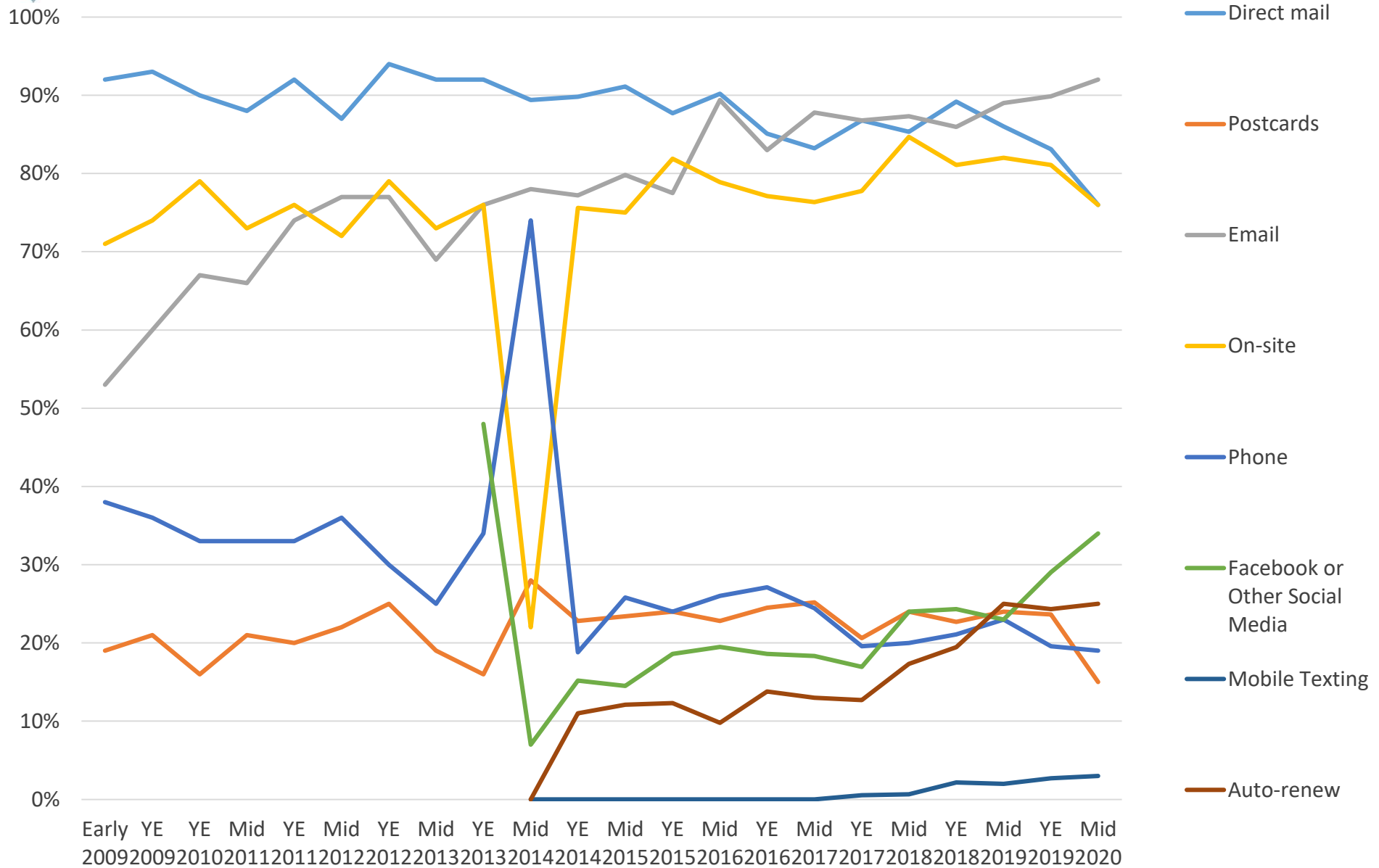


Please indicate the methods your program utilizes to drive membership renewals (check all that apply).





Methods Utilized to Drive Membership Renewals





Recap – Renewals

- Renewal Rates
 - 67% reported a decrease
 - 12% said improved and 21% staying the same
- Median Renewal Rate = 57%
 - Down 10 percentage points from 2019 year-end
 - Median percentage point drop reported was 11 to 15 percentage points
 - 21.1% DO NOT KNOW Renewal Rate
- Median First-Year Renewal Rate = 42%
- Top 3 Renewal Methods
 1. Email
 2. Direct Mail letter packages
 3. On-Site Renewals

And **Auto-Renewal** is on the rise with 25% utilizing now

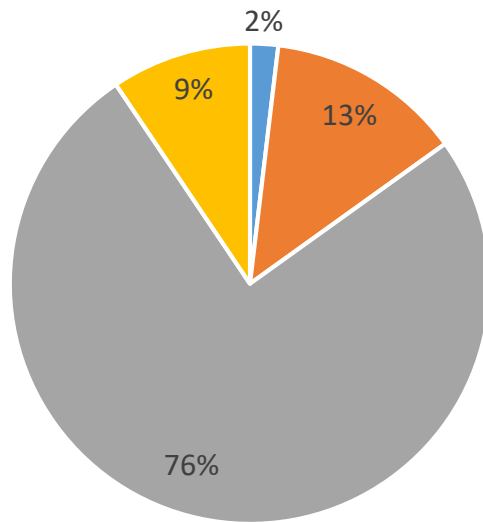


Digital, Online, Social Media and Mobile Marketing

Pulse 2020 Mid-Year Data

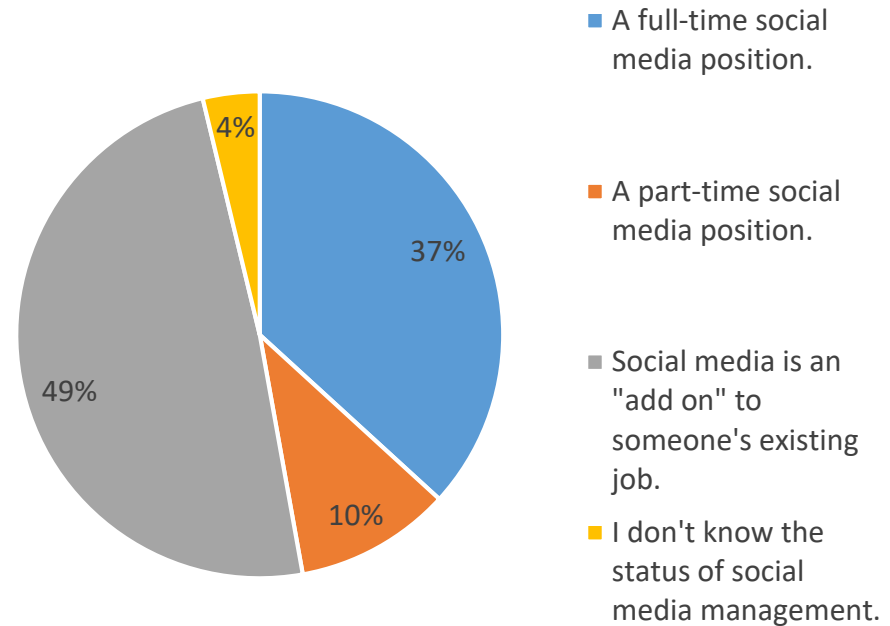


Who manages social media at your organization?



- 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.

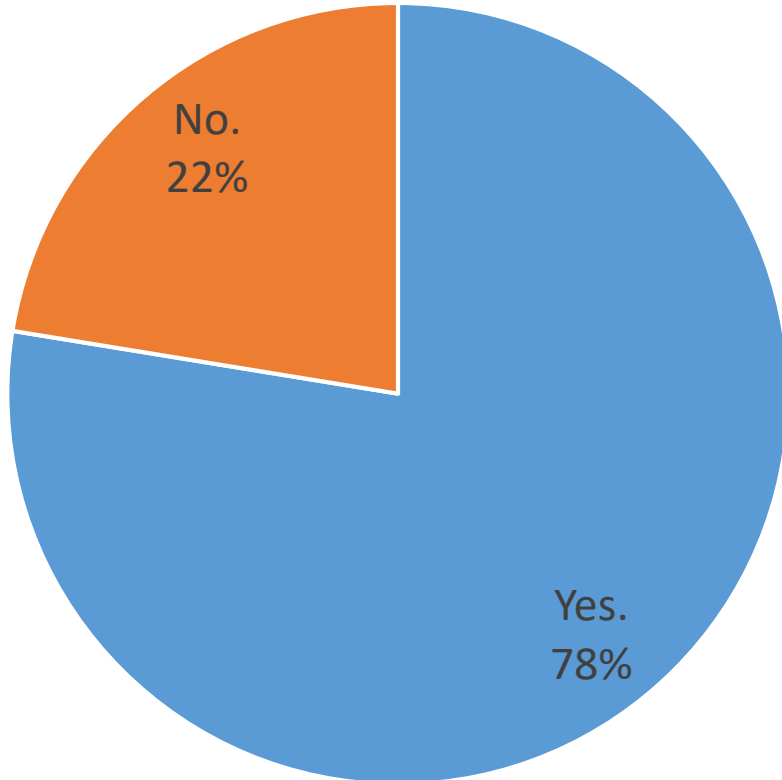
The person at my organization who manages social media is ...



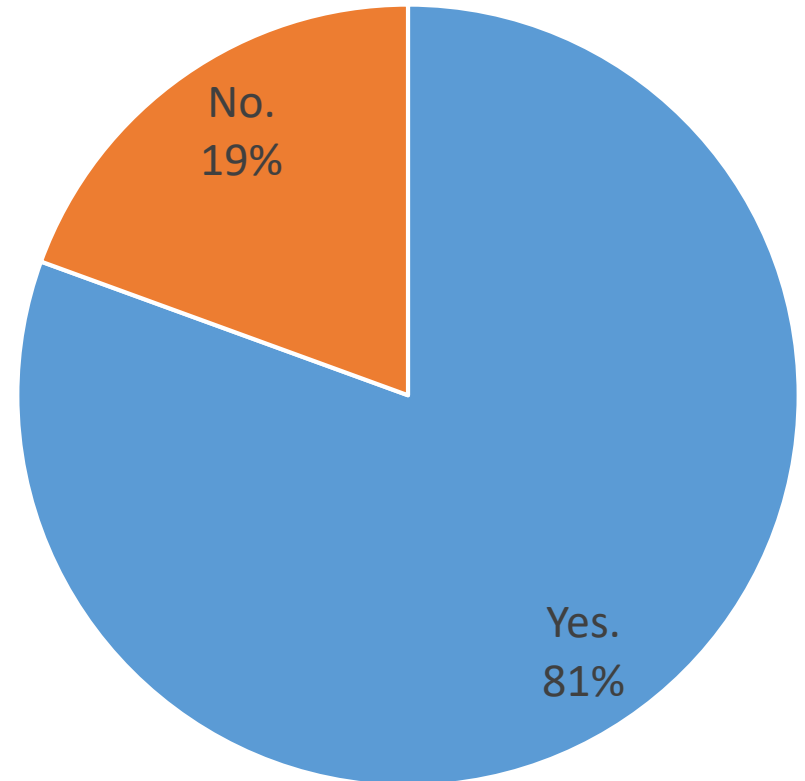
- A full-time social media position.
- A part-time social media position.
- Social media is an "add on" to someone's existing job.
- I don't know the status of social media management.



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

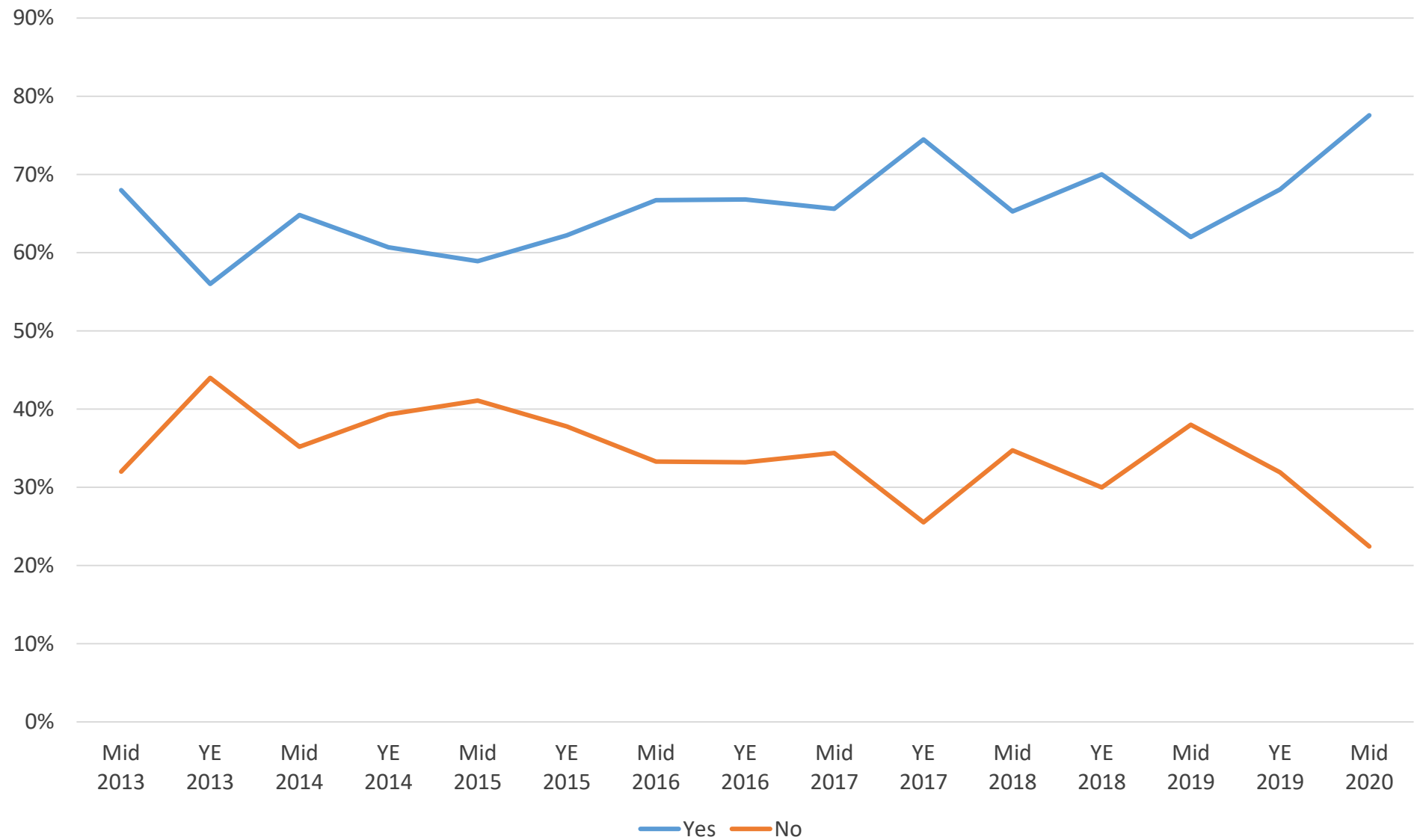


Does Membership have a voice in your organization's social media content management (e.g., membership messages, promotions, contests)?



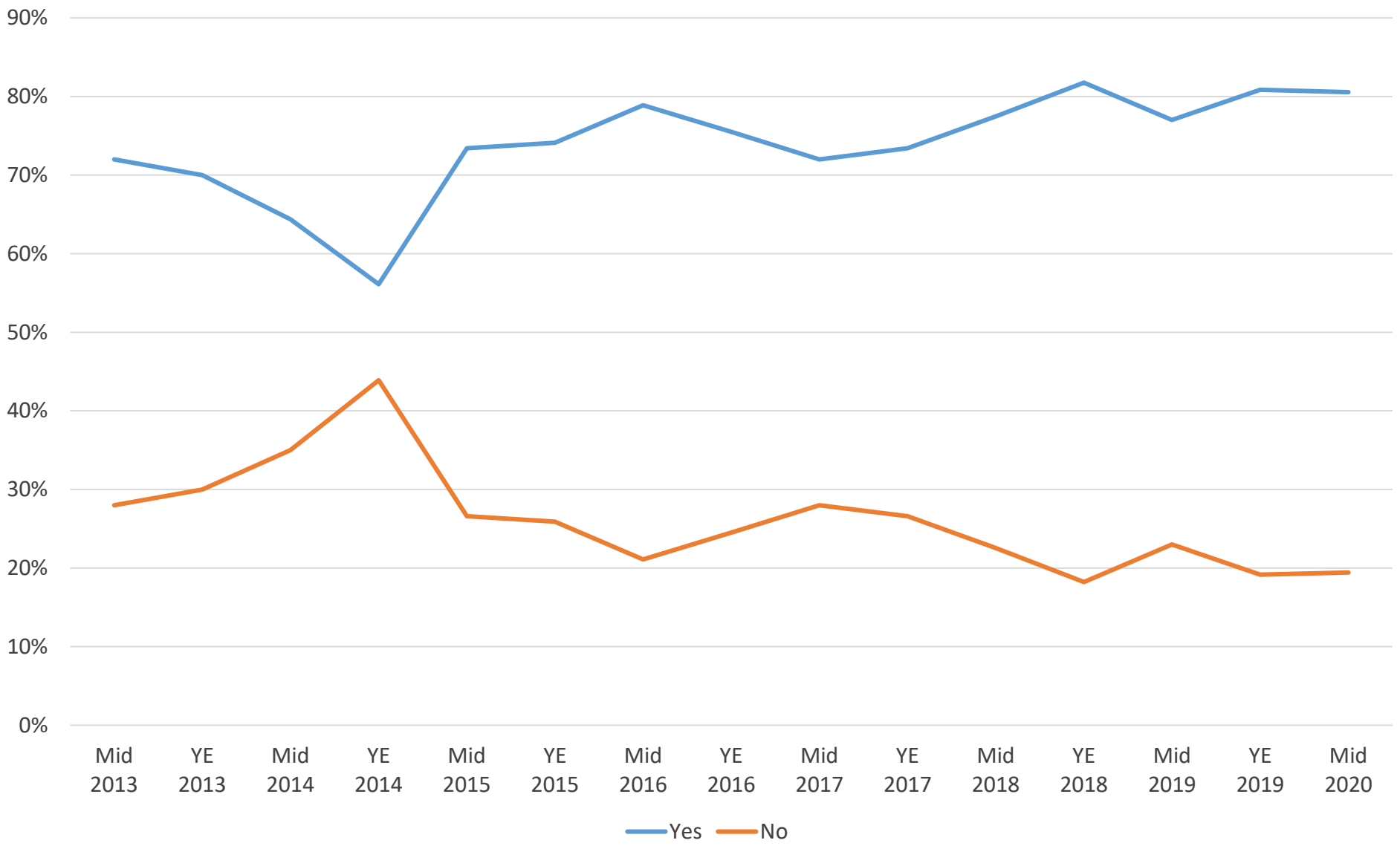


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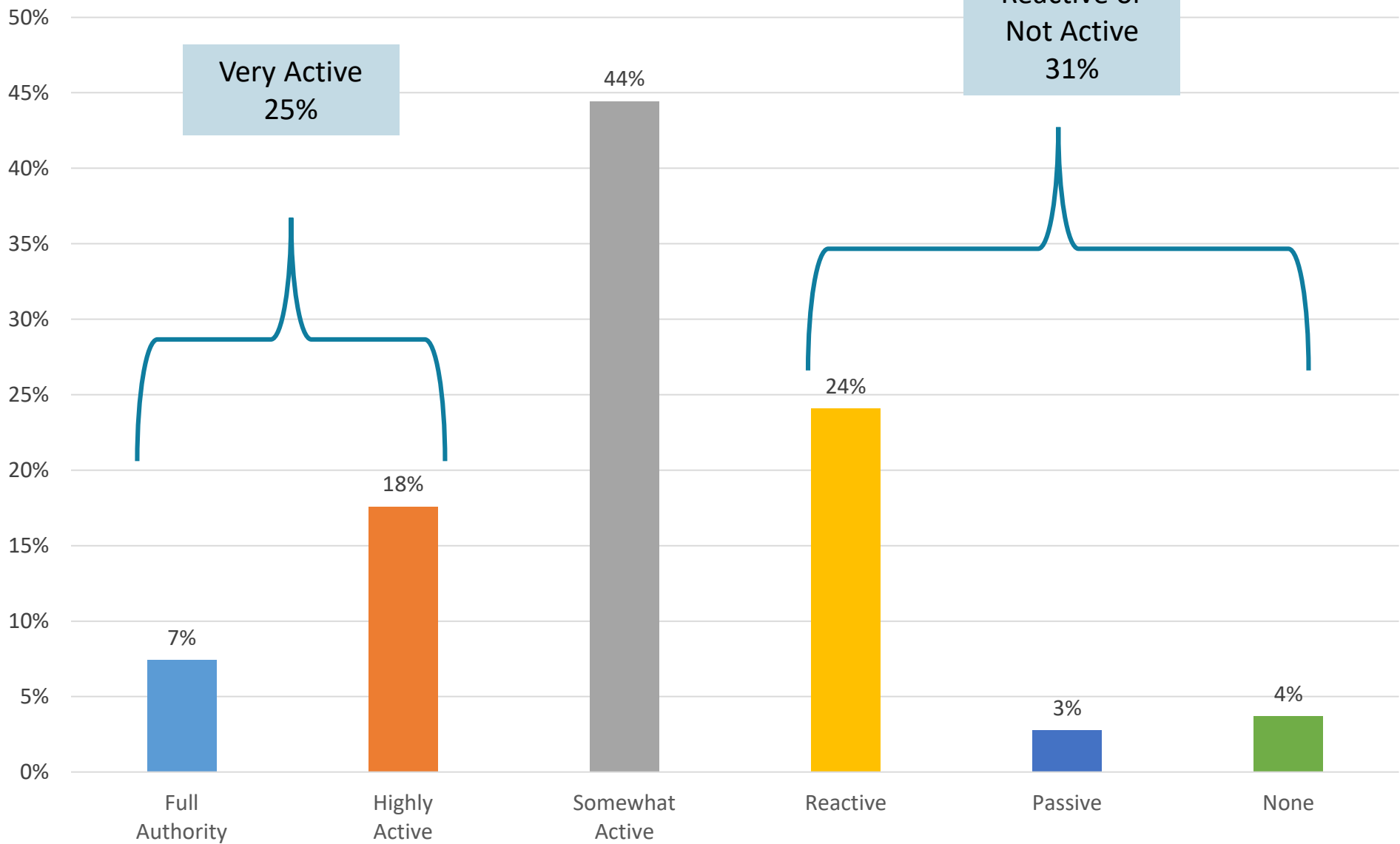


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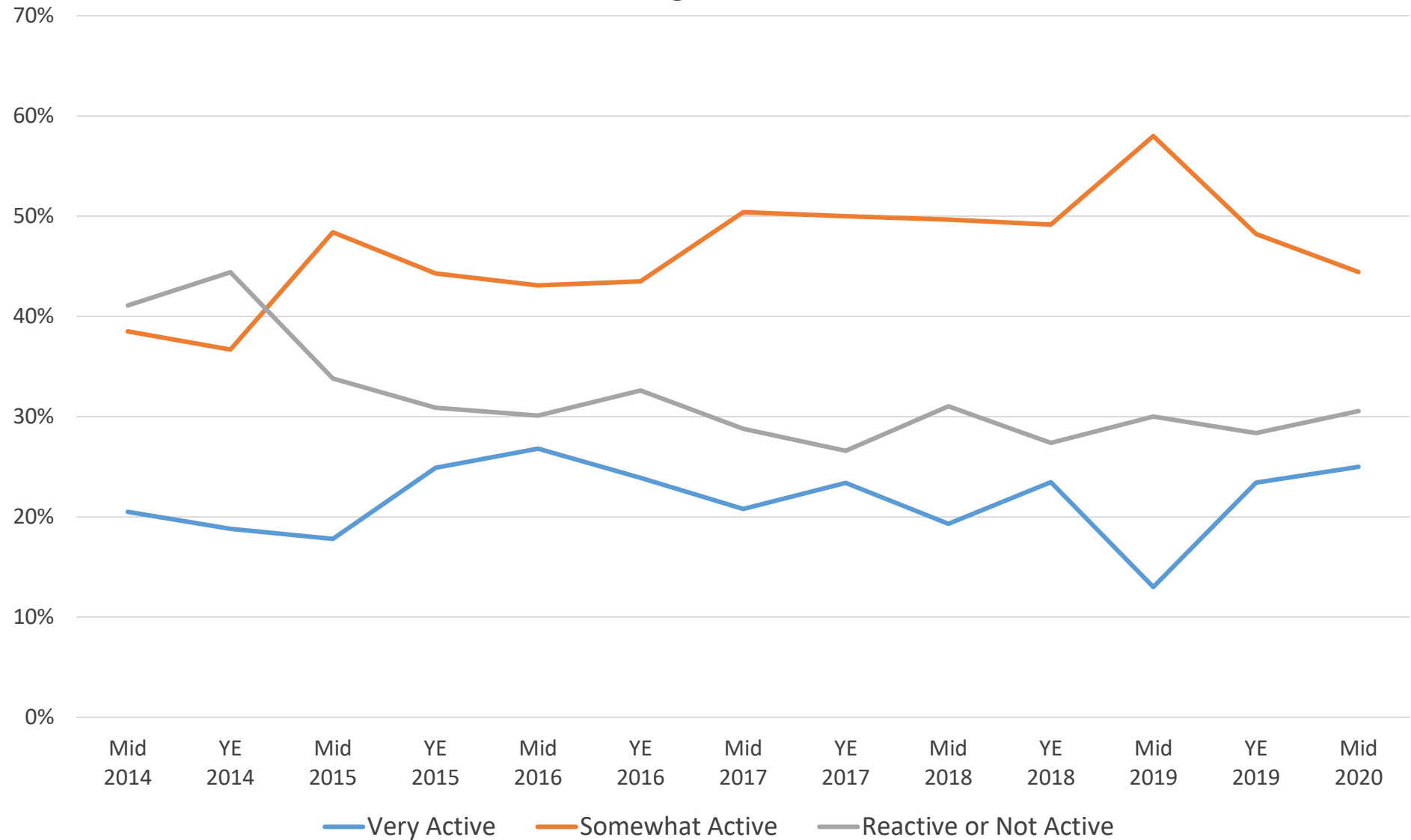


What type of role does membership have in social media content management?



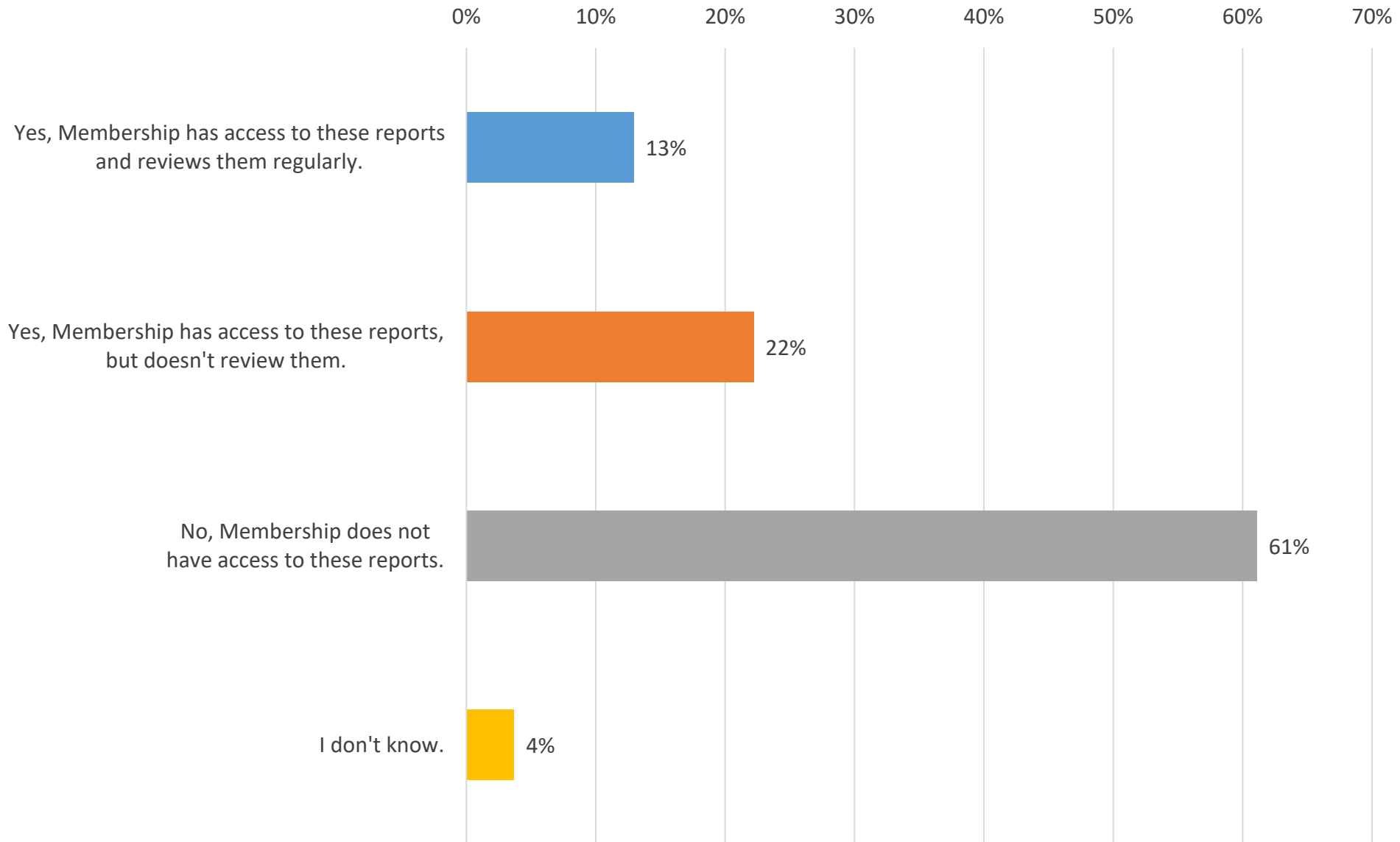


What type of role does membership have in social media content management?



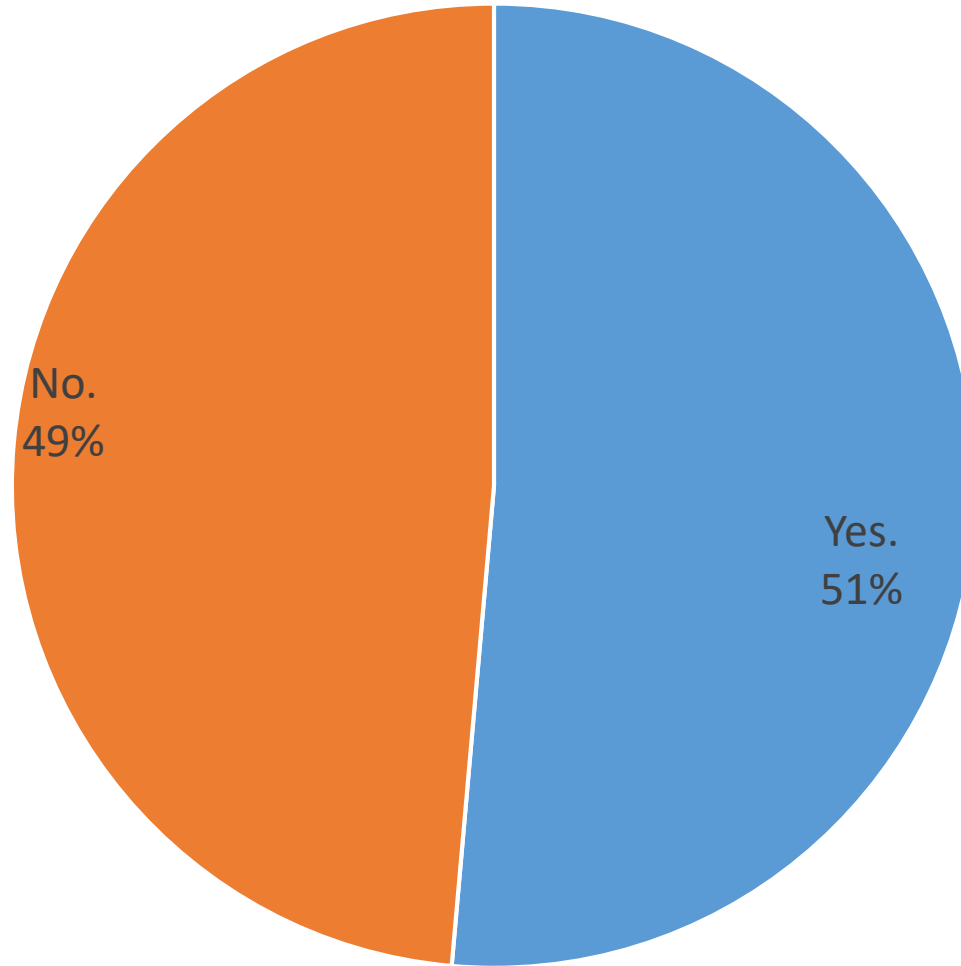


Does Membership have access to and/or does Membership review website/Google Analytics reports?



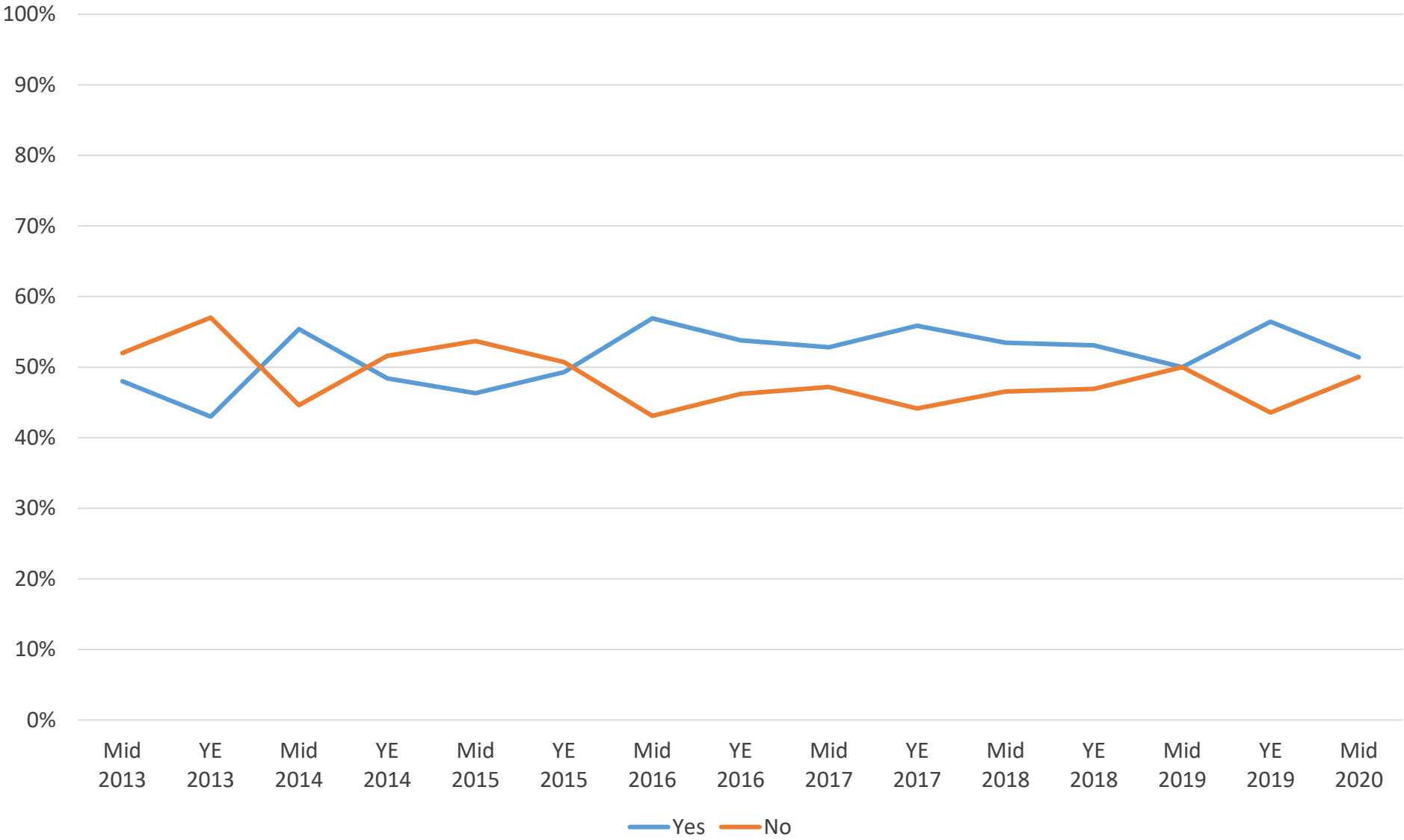


I am satisfied with the voice/role Membership has in our organization's social media strategy.



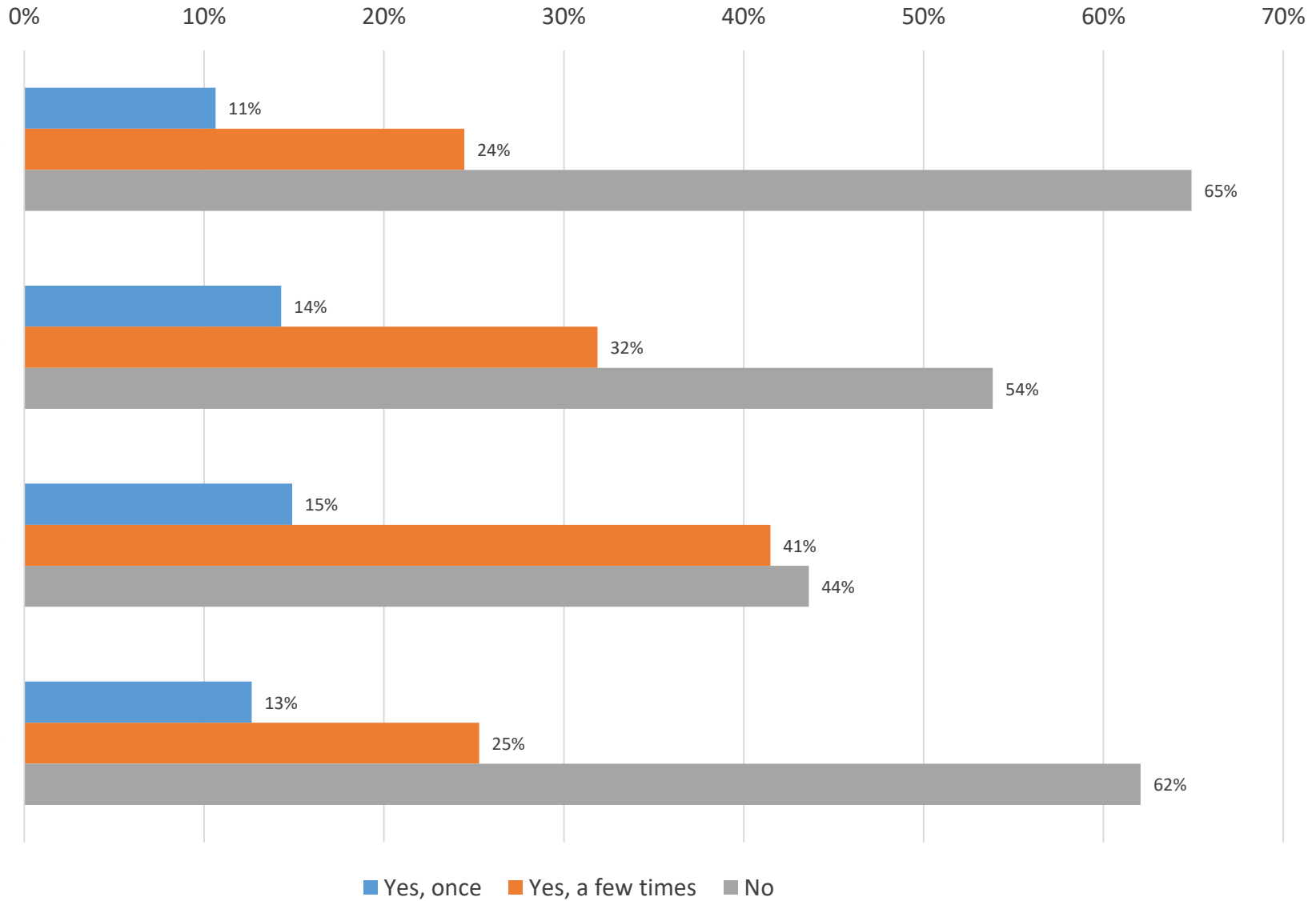


I am satisfied with the voice/role Membership has in our organization's social media strategy.



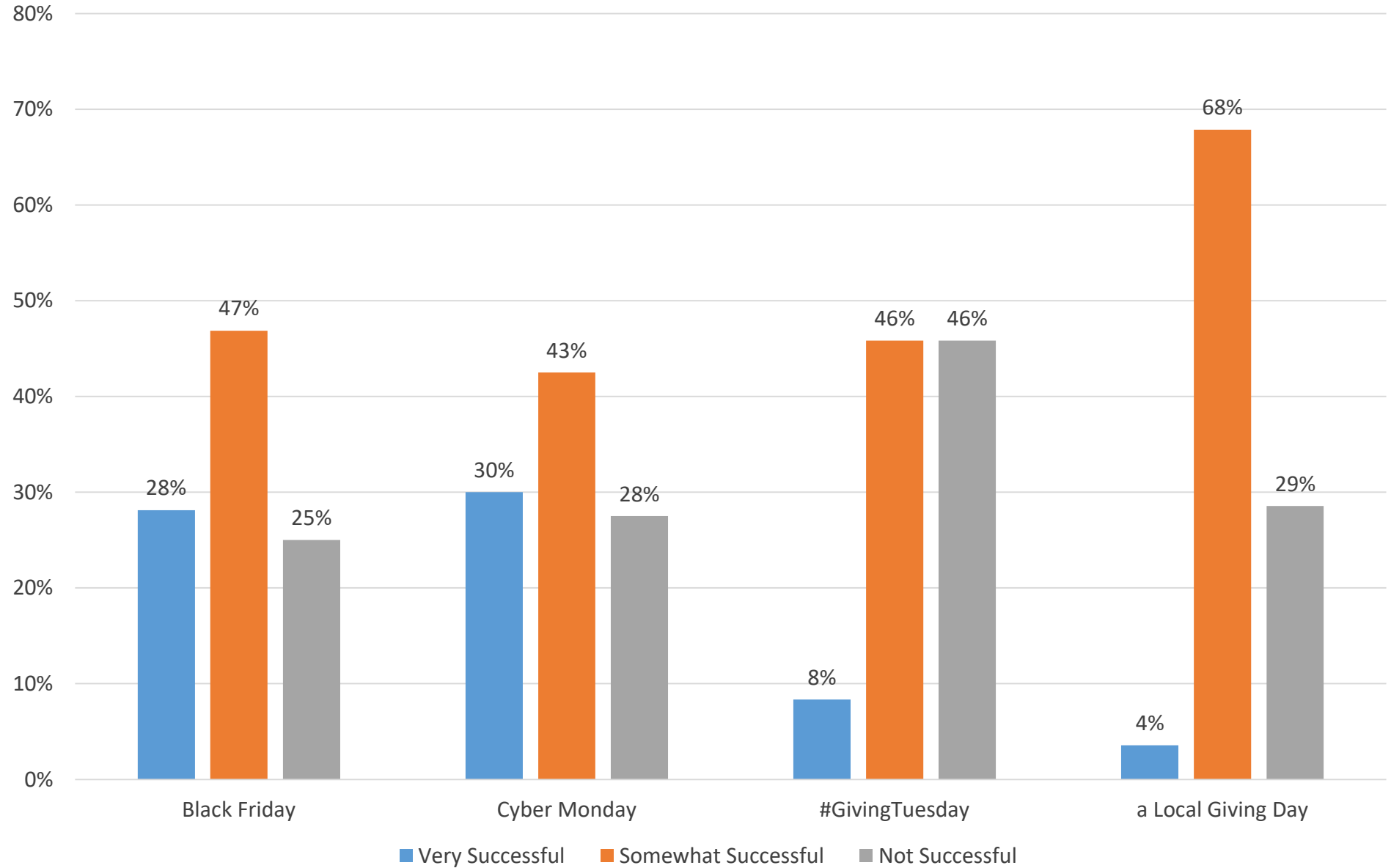


Has your organization participated in any of the following promotions for membership?



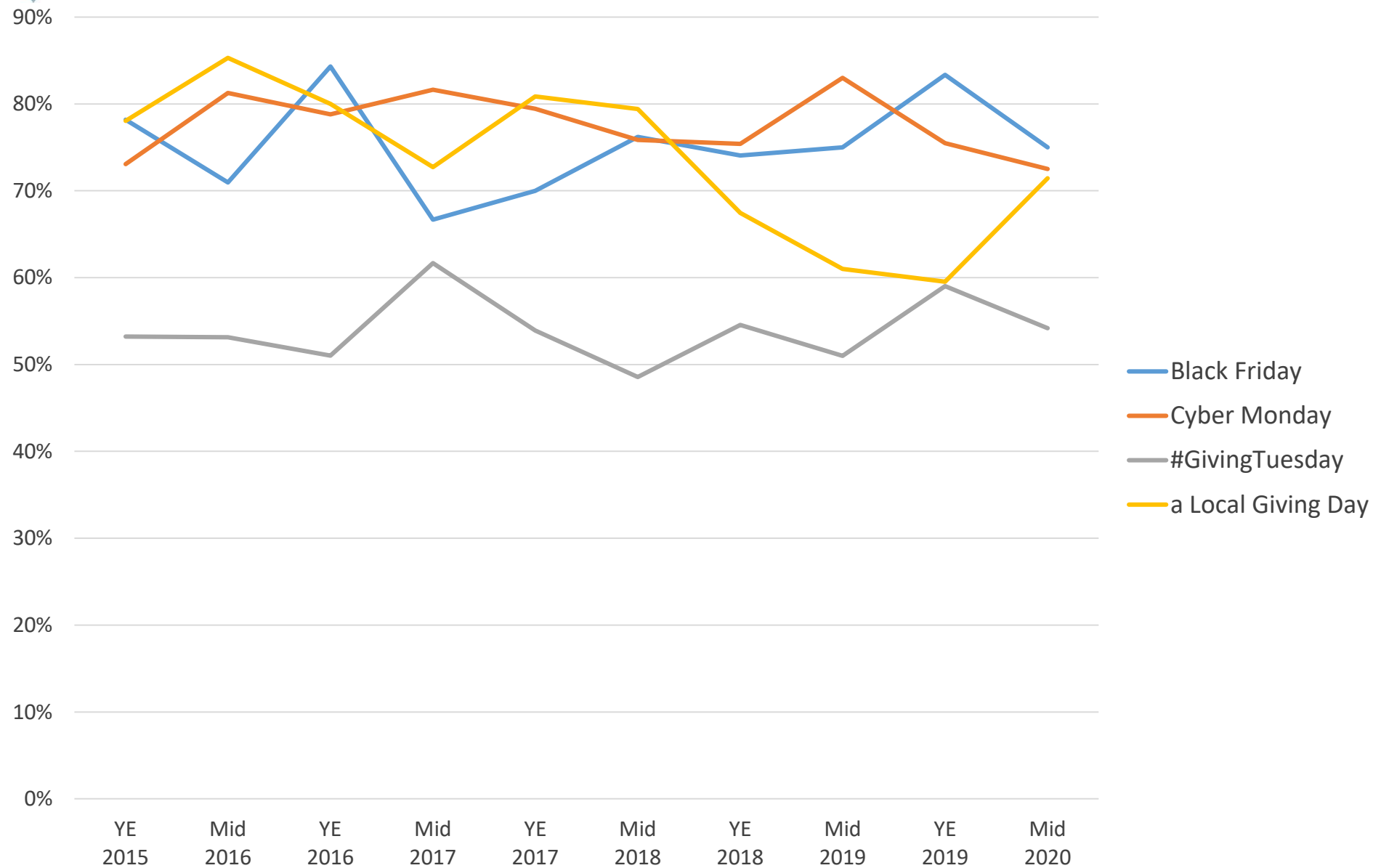


Was the campaign(s) successful?



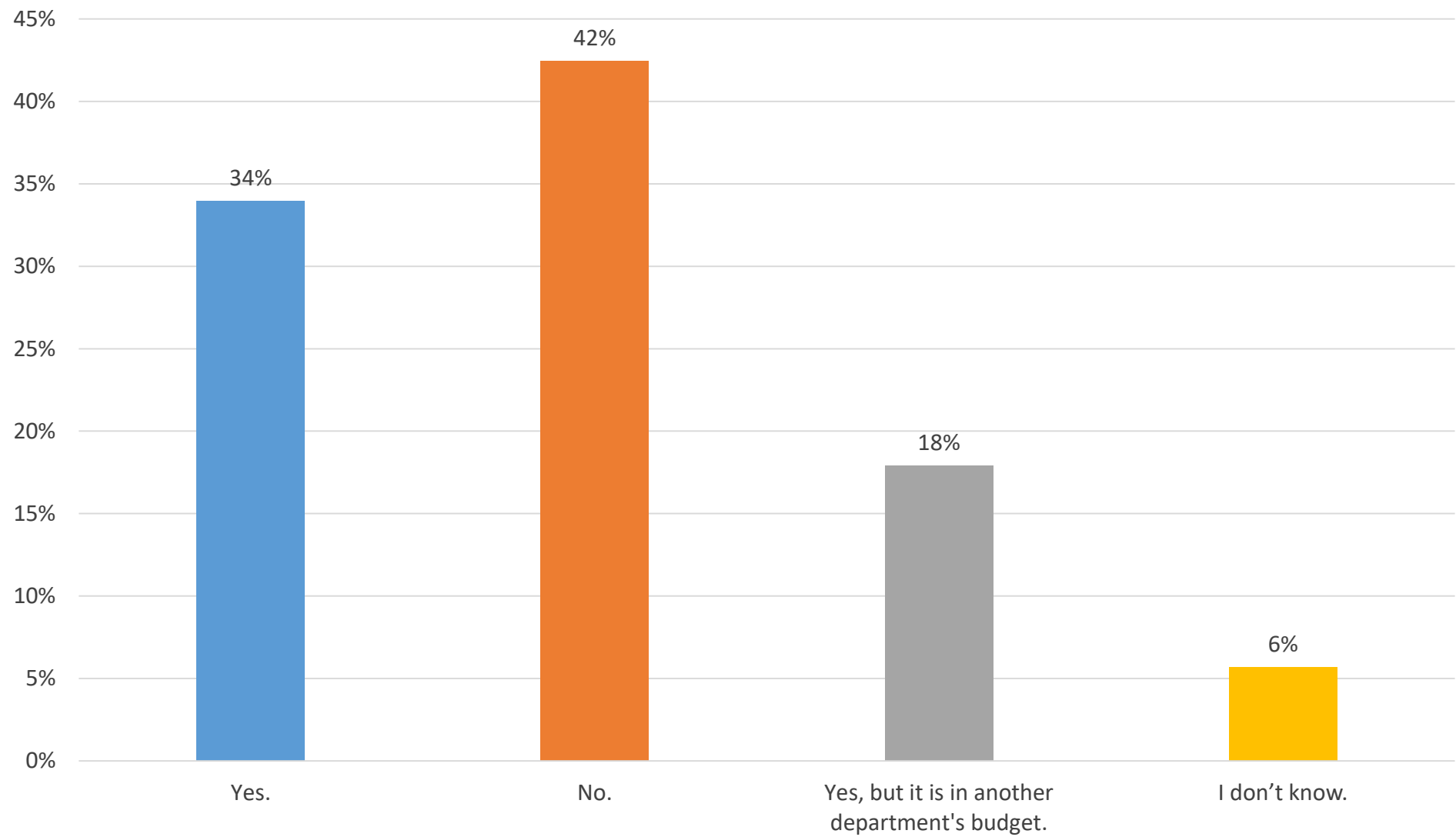


Giving Day Very or Somewhat Successful



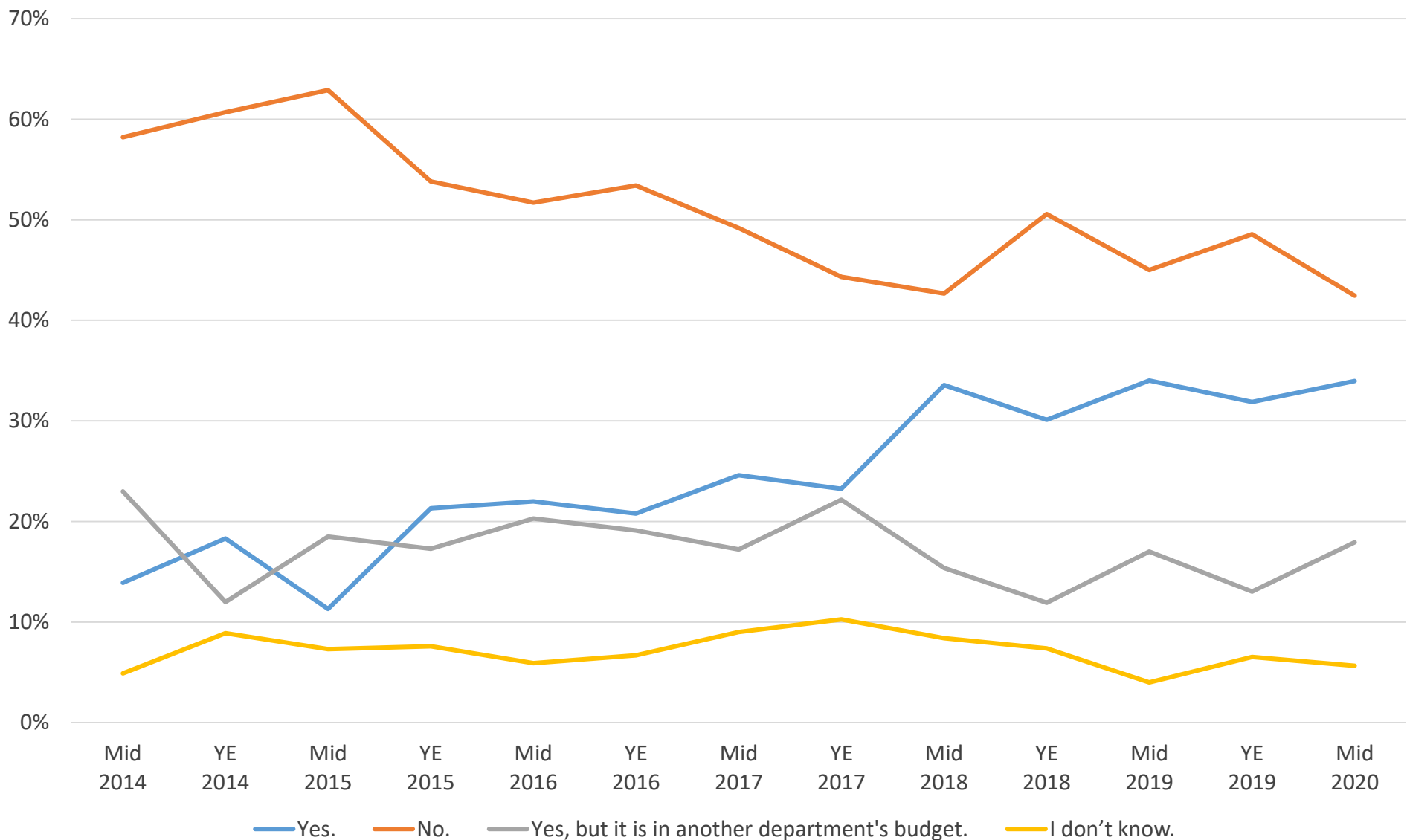


Does Membership have a dedicated line item in the budget for digital marketing (e.g., online advertising, social media campaigns, email marketing)?



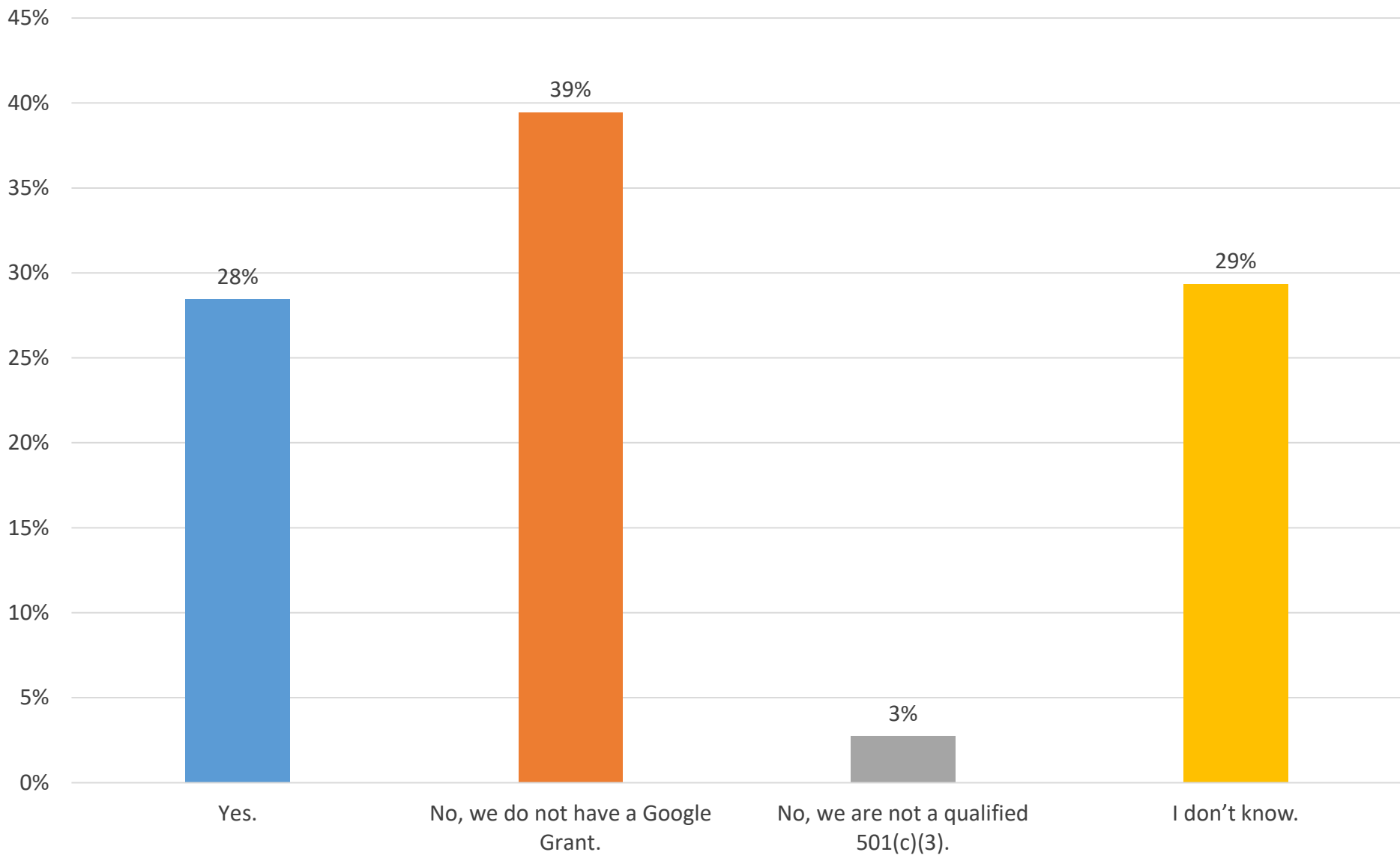


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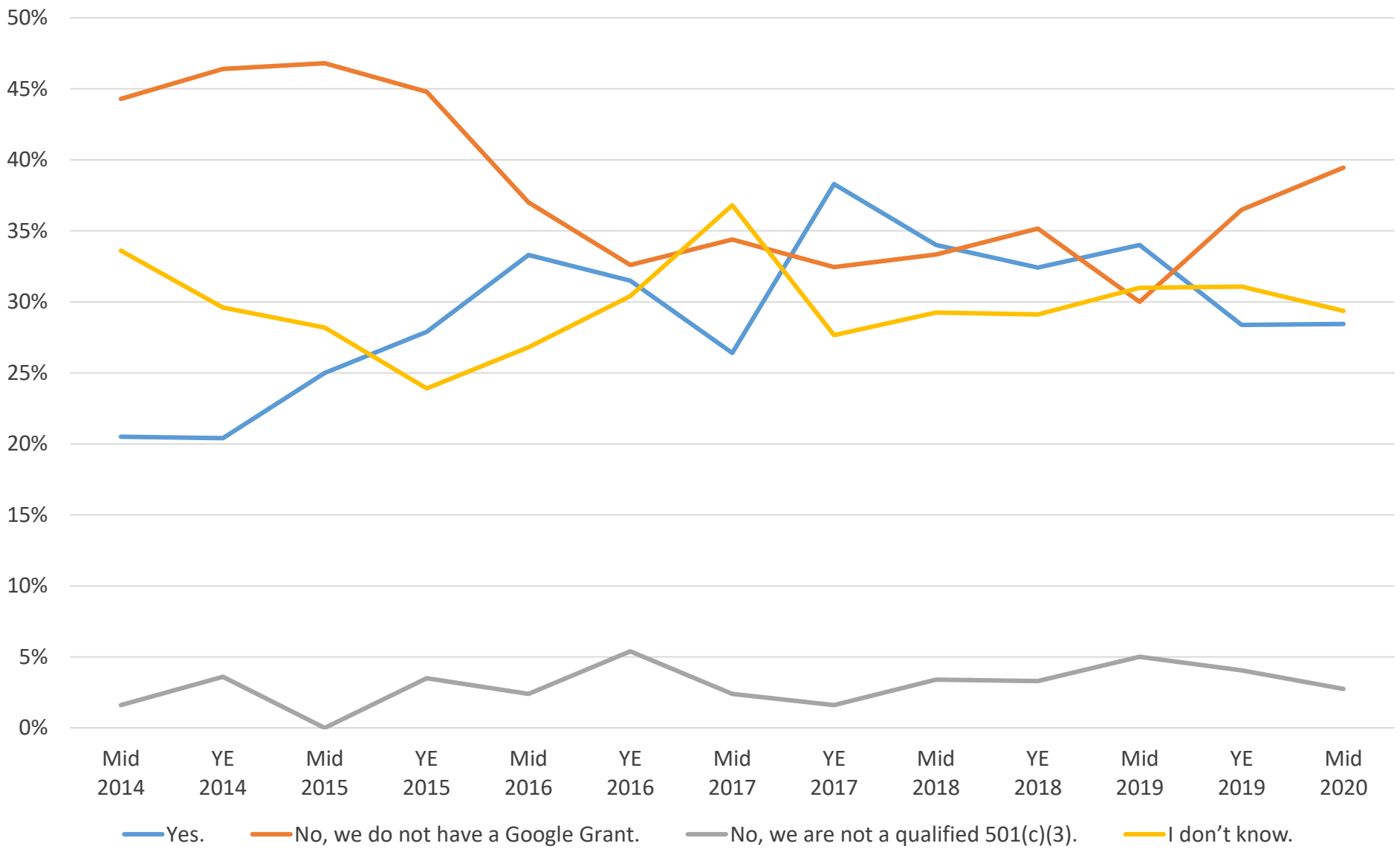


Does your organization have a Google Grant for online advertising (i.e., Google AdWords)?



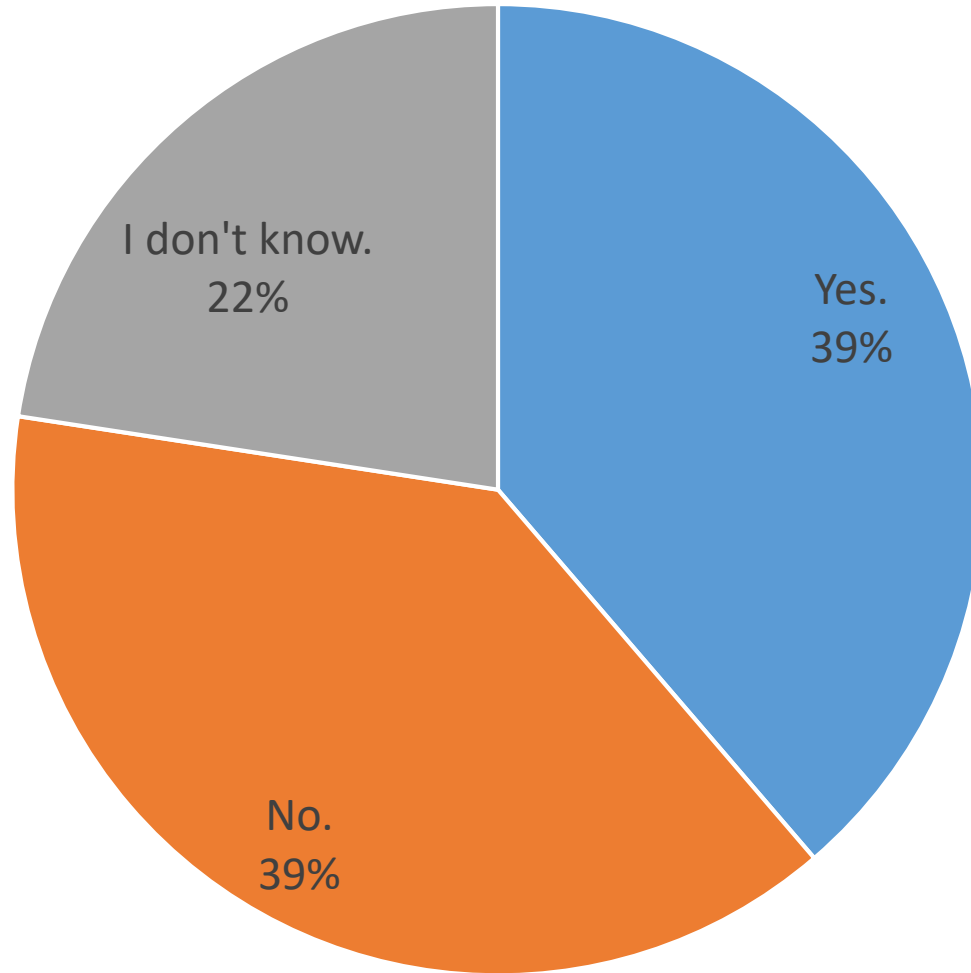


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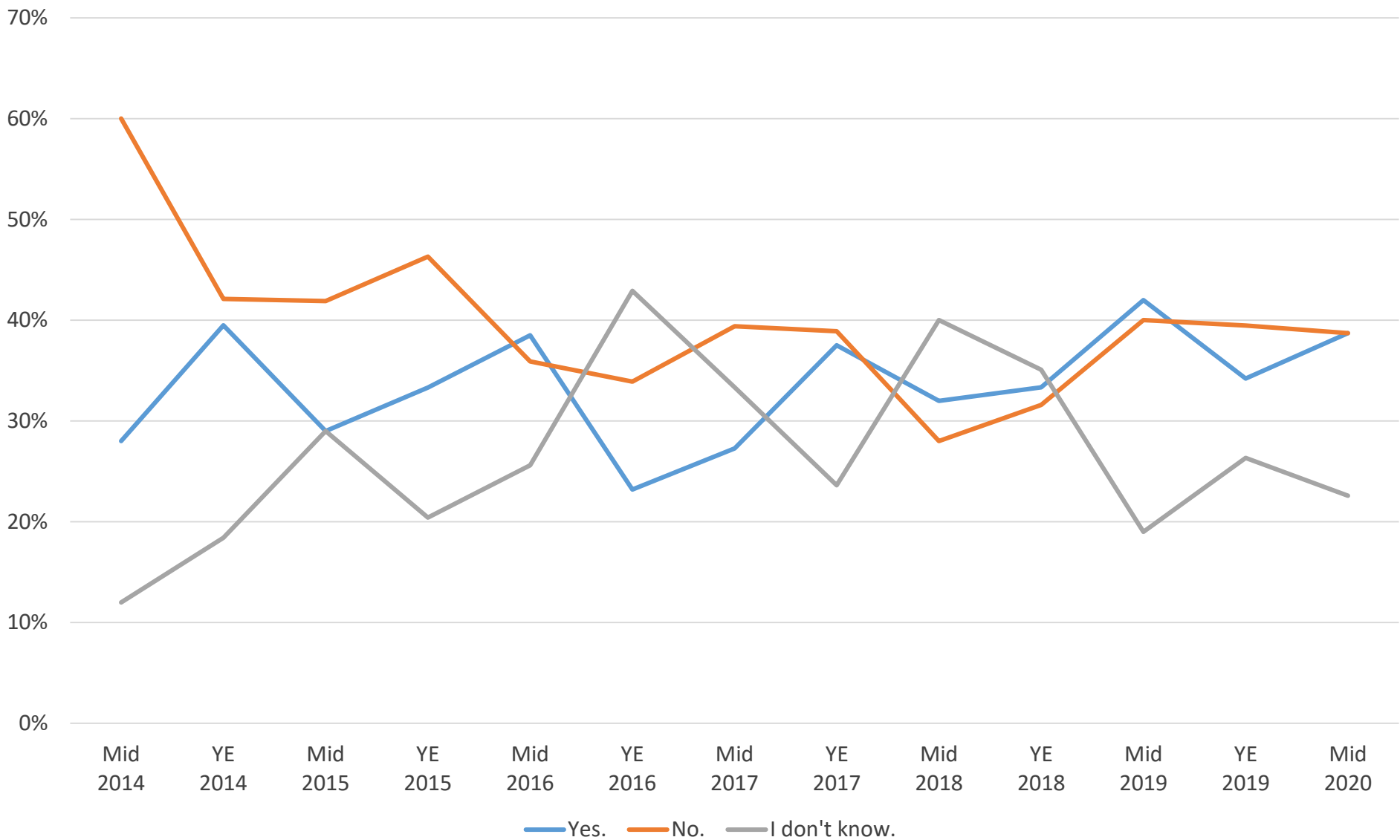


Is Membership acquisition supported by membership advertising as a portion of the Google Grant?





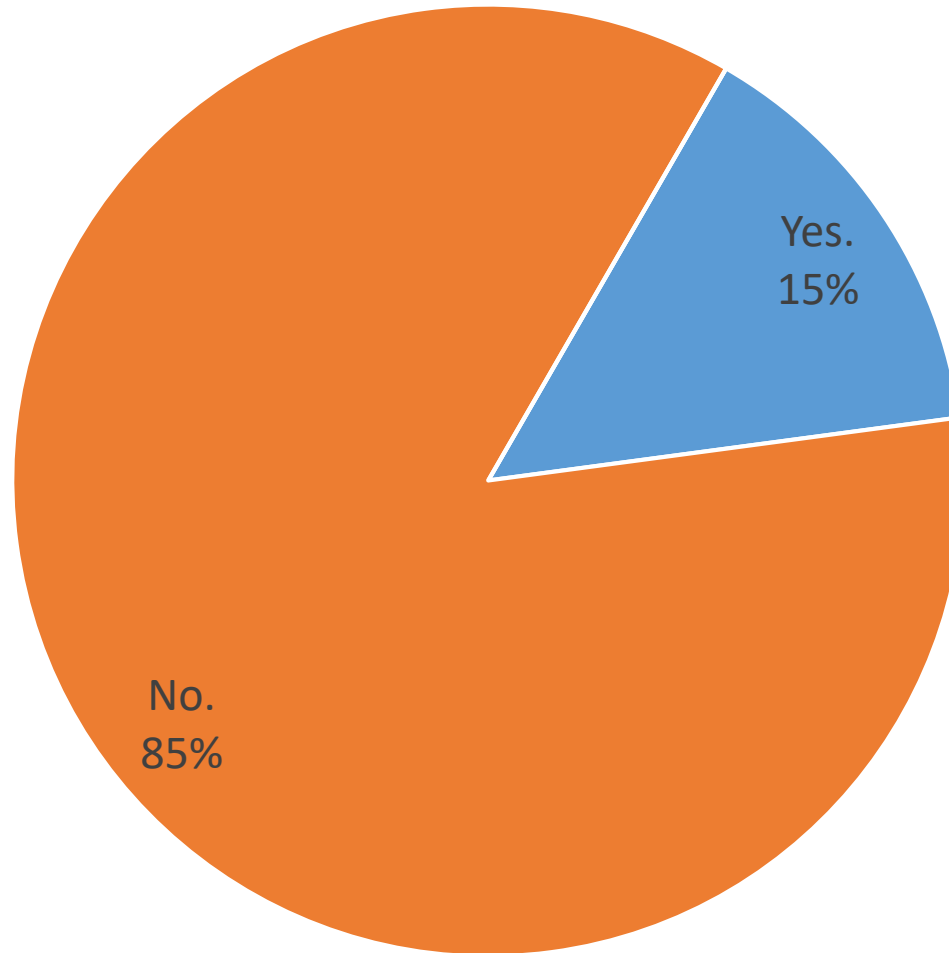
Is Membership acquisition supported by membership advertising as a portion of the Google Grant?



— Yes. — No. — I don't know.

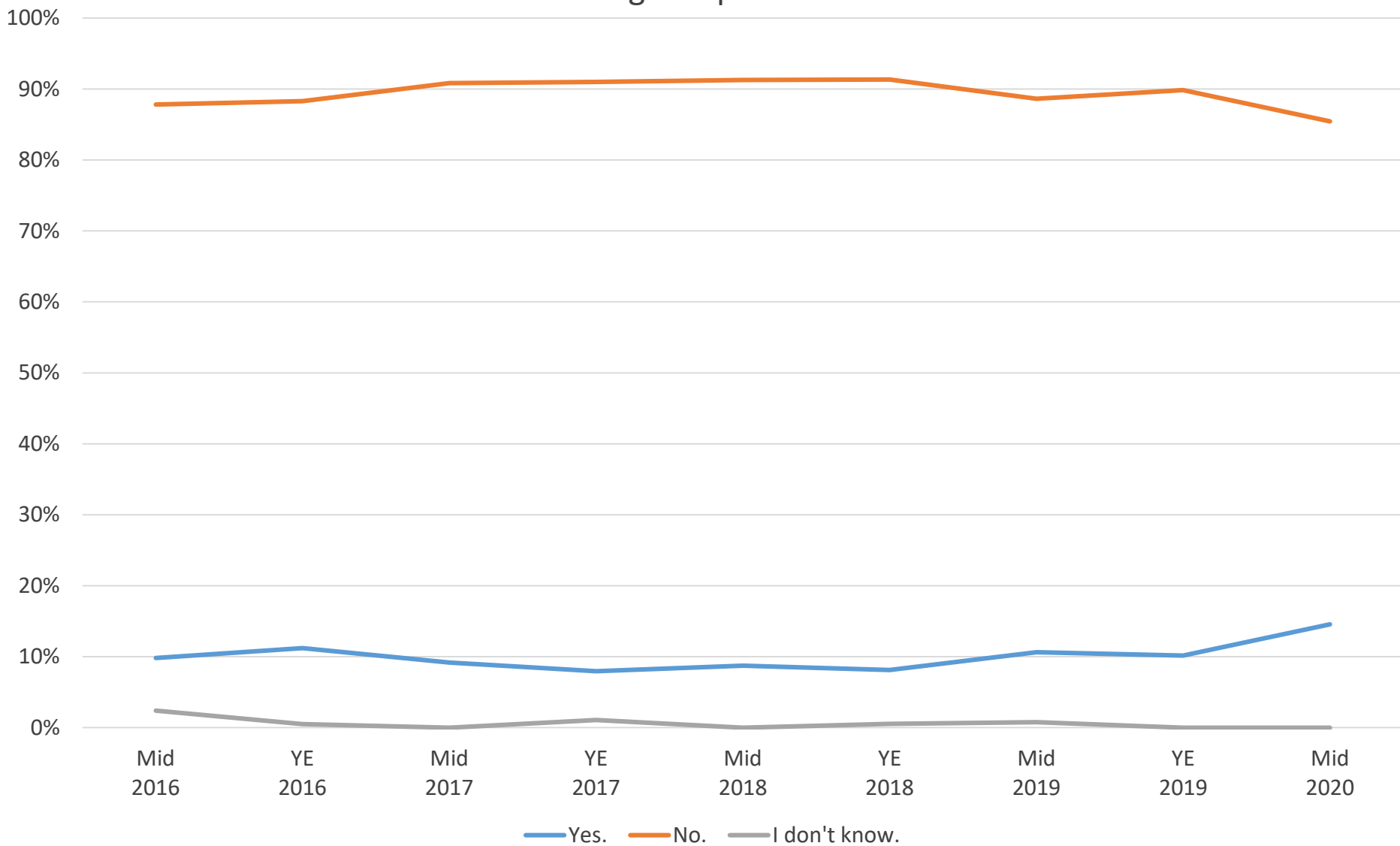


Does your organization have a mobile app that features a membership servicing component?



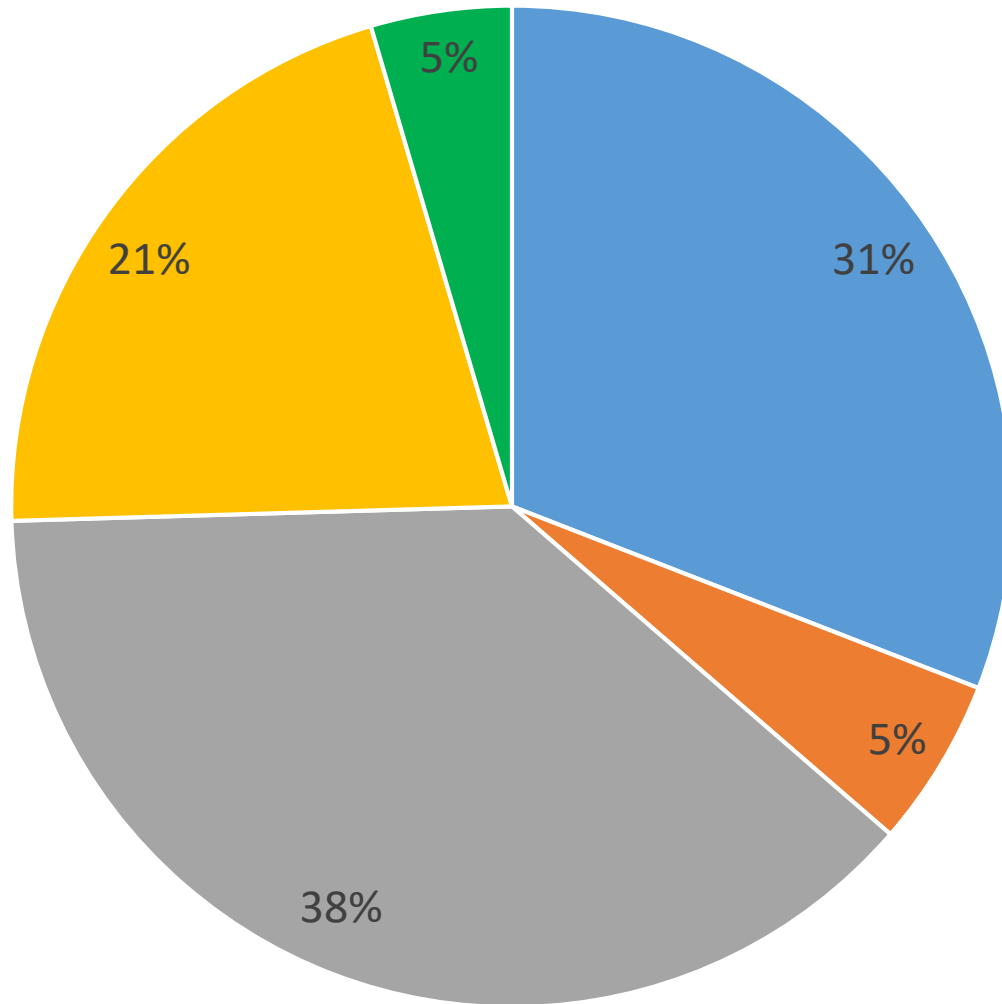


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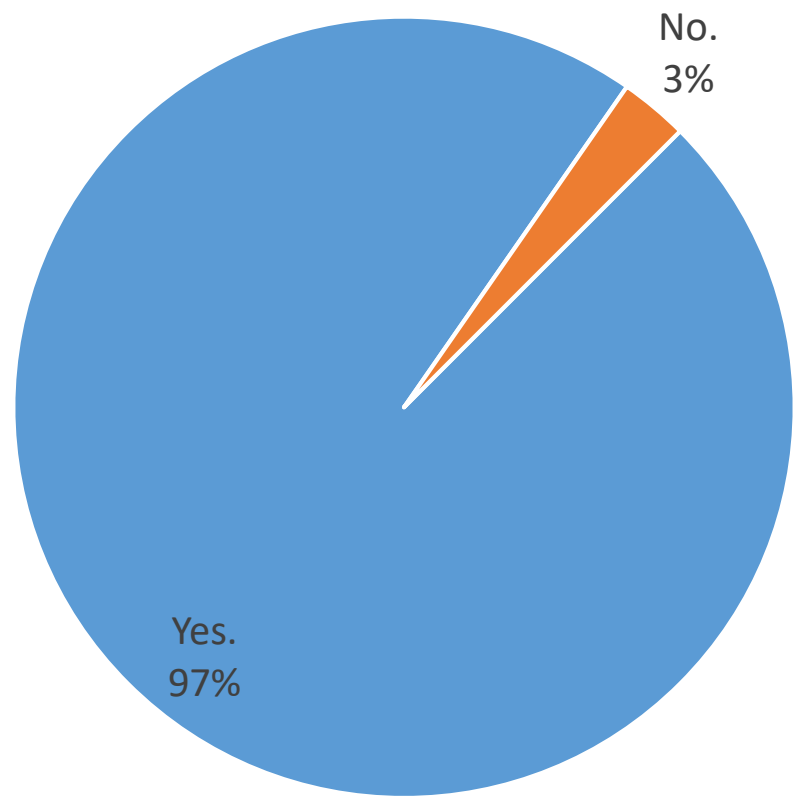
Are you currently able to deliver digital membership cards to your members?



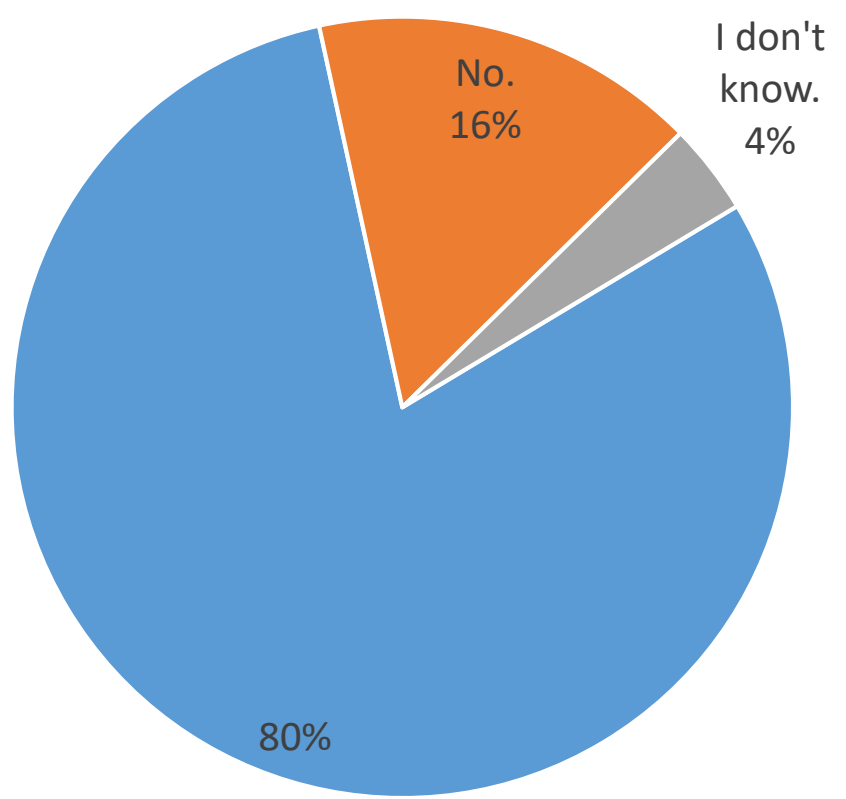
- Yes, and we do offer this service to members.
- Yes, but we do not offer this service to members.
- No, we are unable to offer this service to members, but would like to offer it to members.
- No, we are unable to offer this service to members, and do not wish to offer it to members.
- I don't know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



Do you, as a membership manager, have the authority/ability to communicate with your members via email?



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%

Everyday.

0.0%

A few times a week.

15.1%

Once a week.

23.6%

A few times a month.

42.5%

Once a month.

12.3%

Once every couple of months.

1.9%

A few times a year.

1.9%

Once a year.

0.0%

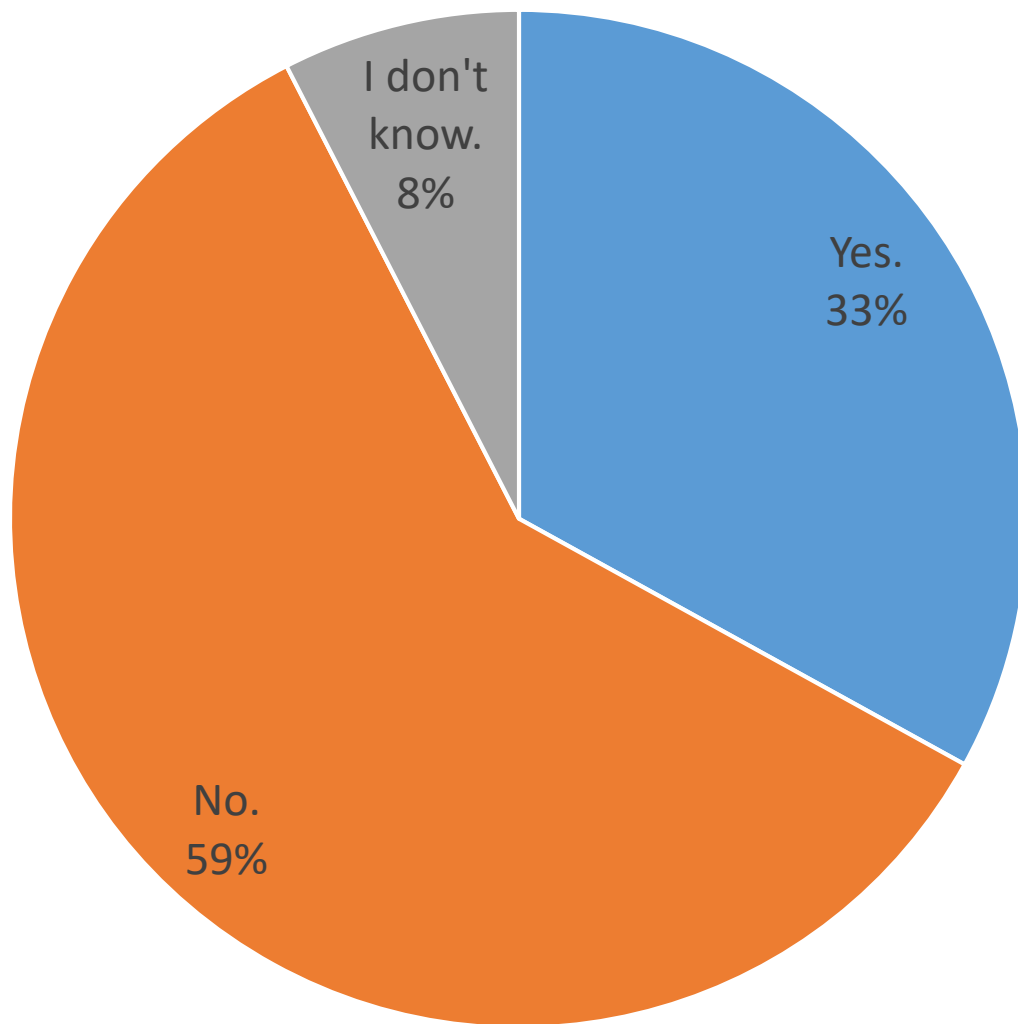
Less often than once a year.


0.0%



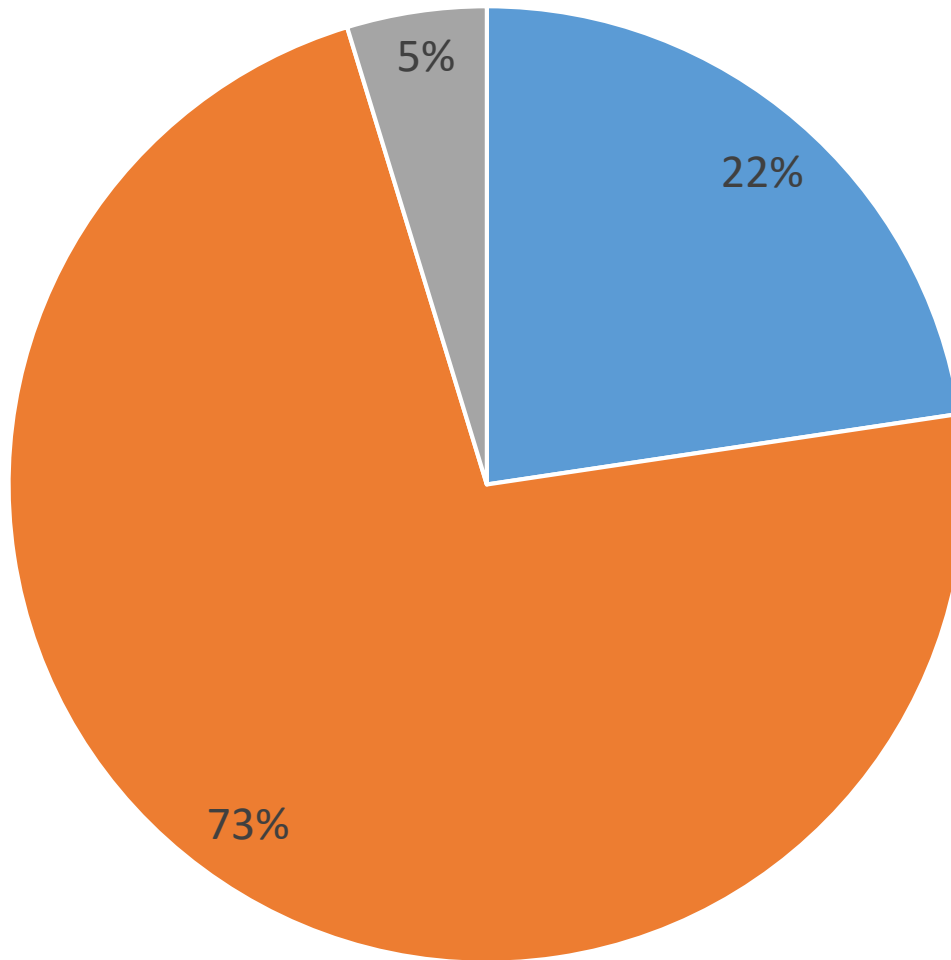


Does your organization limit the number of emails members can receive?





During the time of the **Coivd-19** pandemic and closures, how have you handled communications with members and others?



- We've communicated on our usual schedule.
- We've increased the frequency of communications.
- We've decreased the frequency of communications.



Recap – Digital, Online, Social Media and Mobile Marketing

- Online & digital communications are more important now than ever!
- Budgeting for digital on the rise
- Increases in digital member card usage among institutions
- Still a need for more access for membership managers for digital reporting and analytics
- Slight uptick in mobile texting
- Recommend 24 to 48 email touches annually for members

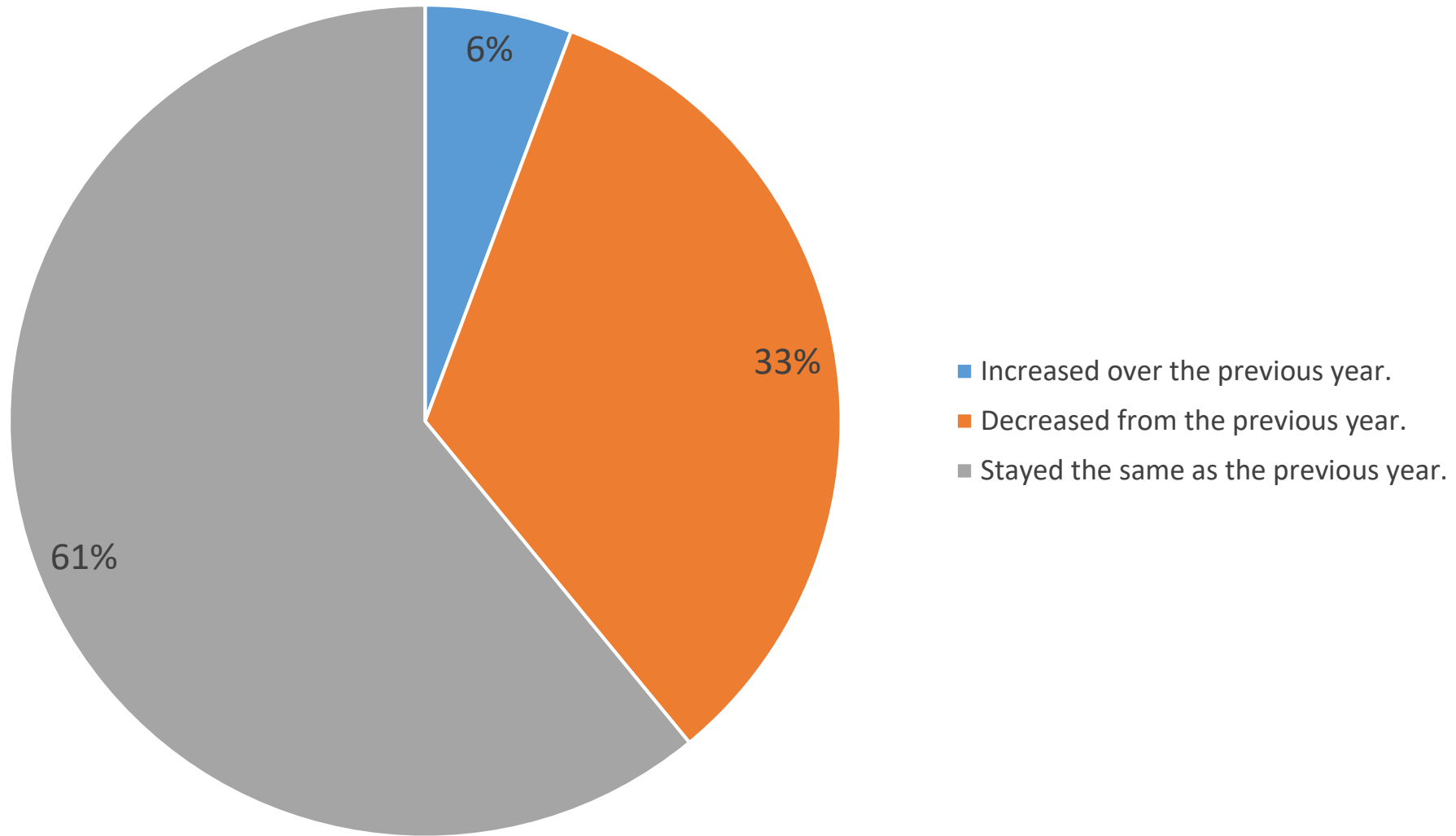


Staffing and Salary

Pulse 2020 Mid-Year Data

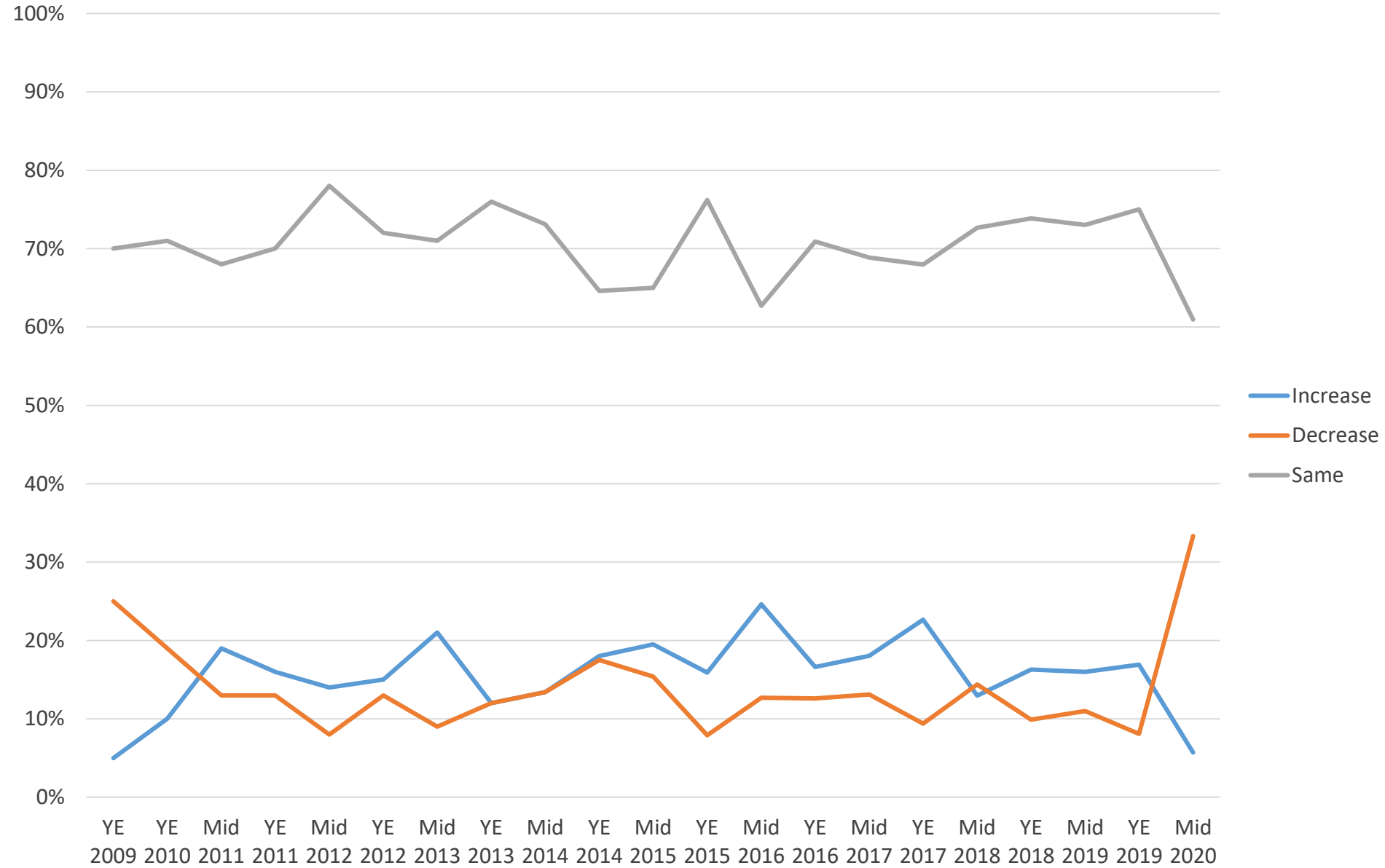


This year, staffing levels within the membership department have ...





Staffing Levels





How is membership positioned in your organization? (Check all that apply.)

0% 10% 20% 30% 40% 50% 60%

In the development department.



Membership is a free-standing department.



In the guest experiences/visitor services department.



In the institutional advancement department.



In a department with development and marketing.



Our organization is small; we do not have departments.



In the marketing department.

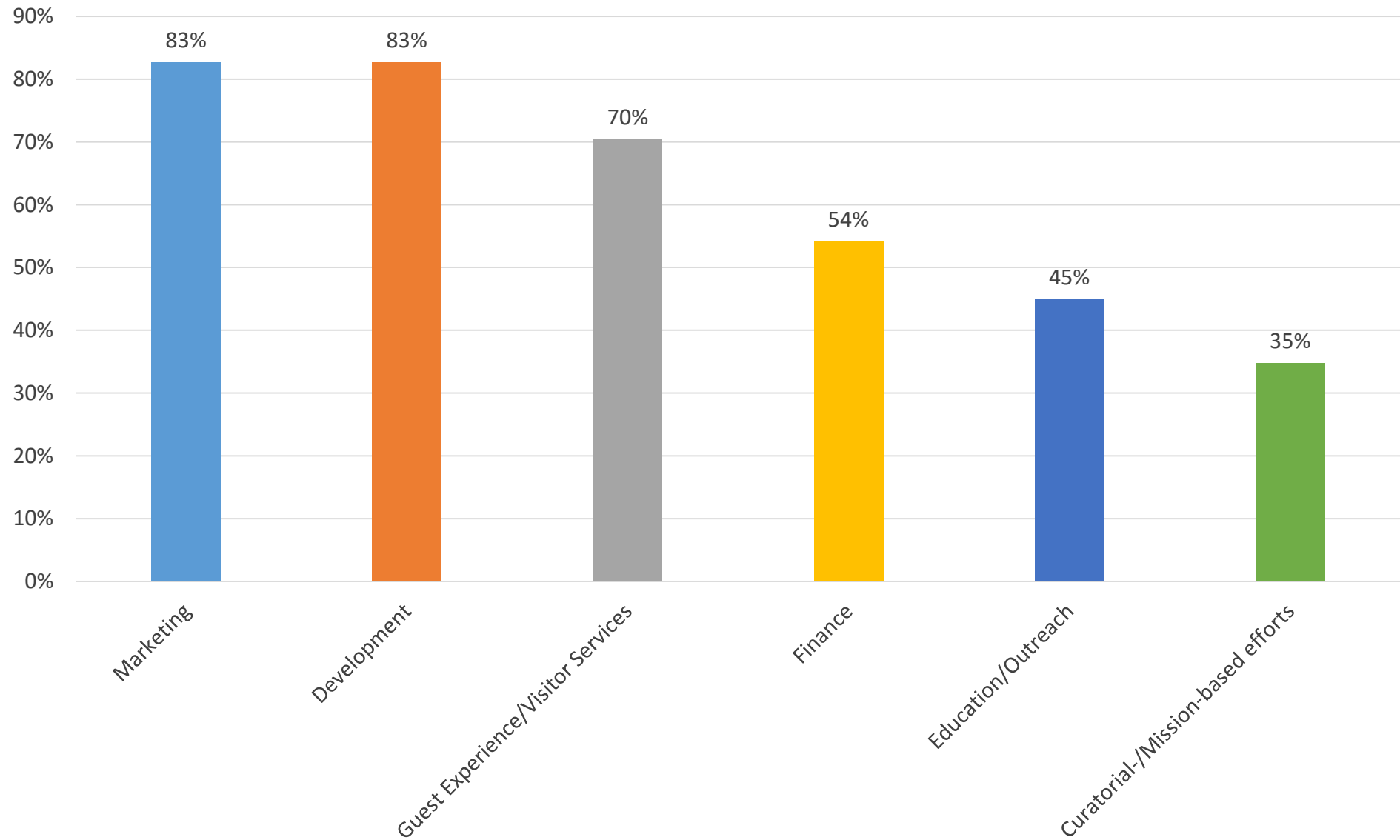


In the finance department.



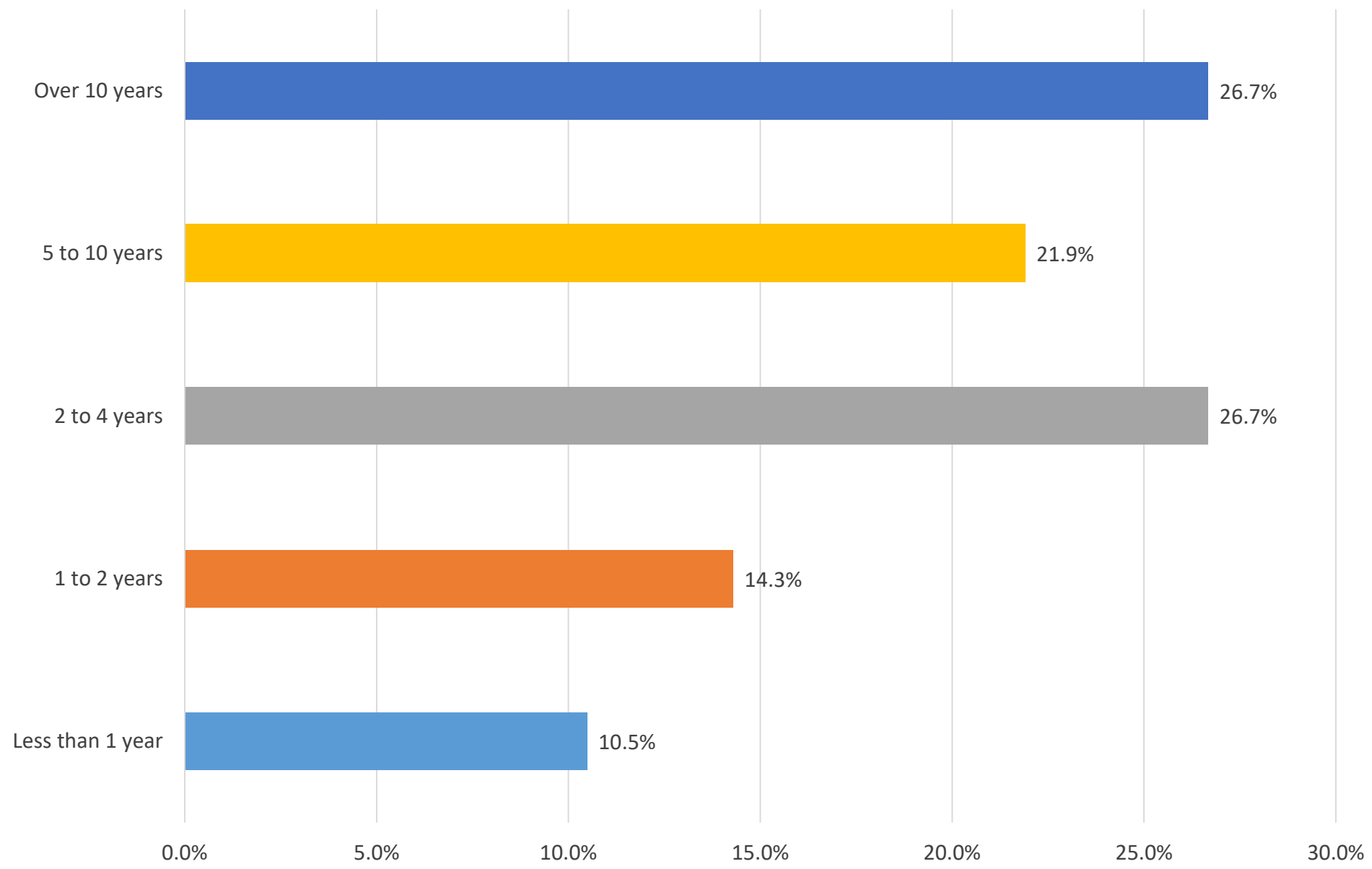


Does membership planning occur with and do you have the support of the following departments? (Check all that apply.)



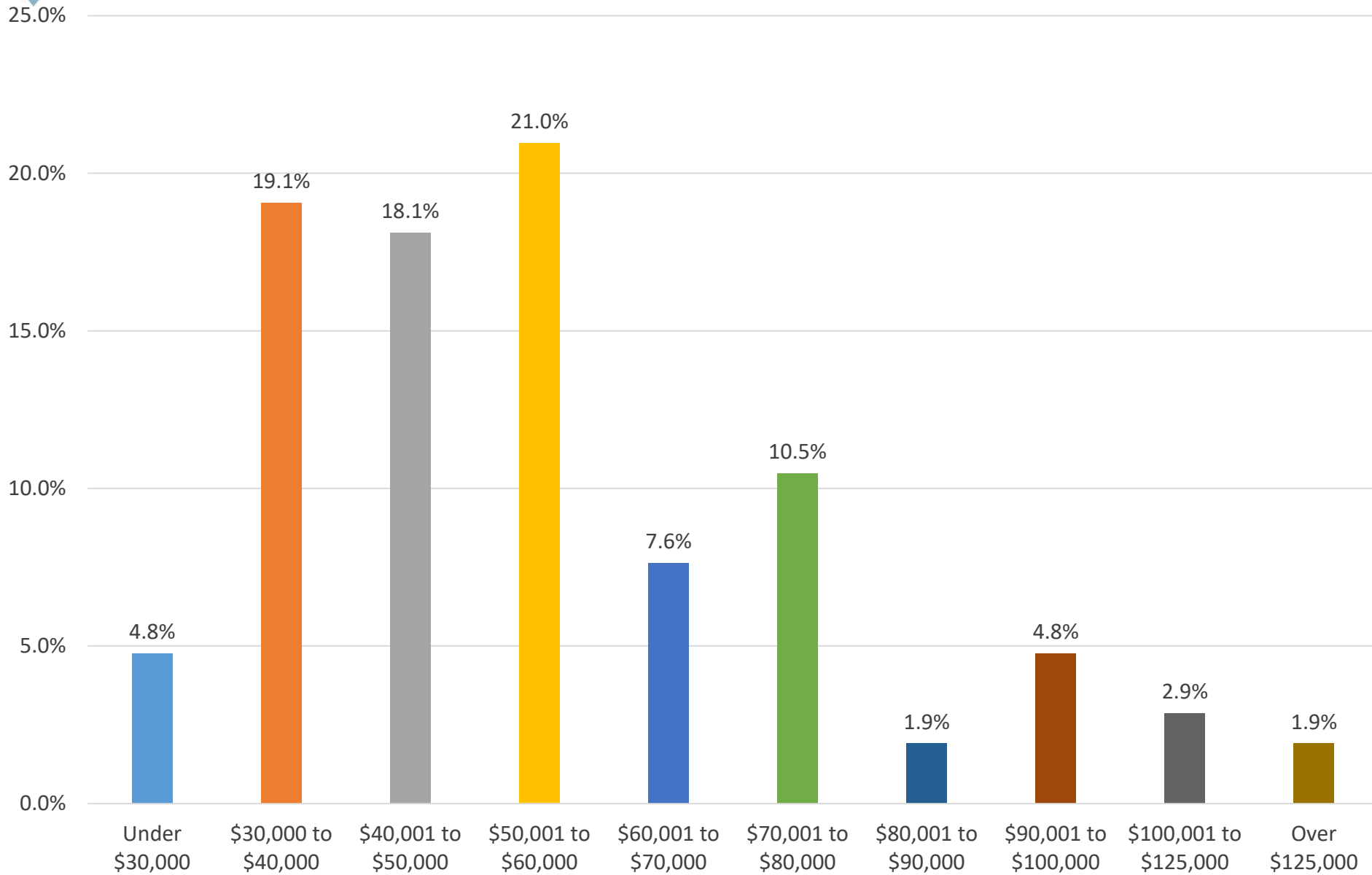


How long have you served in a membership position?





What is your annual salary range?



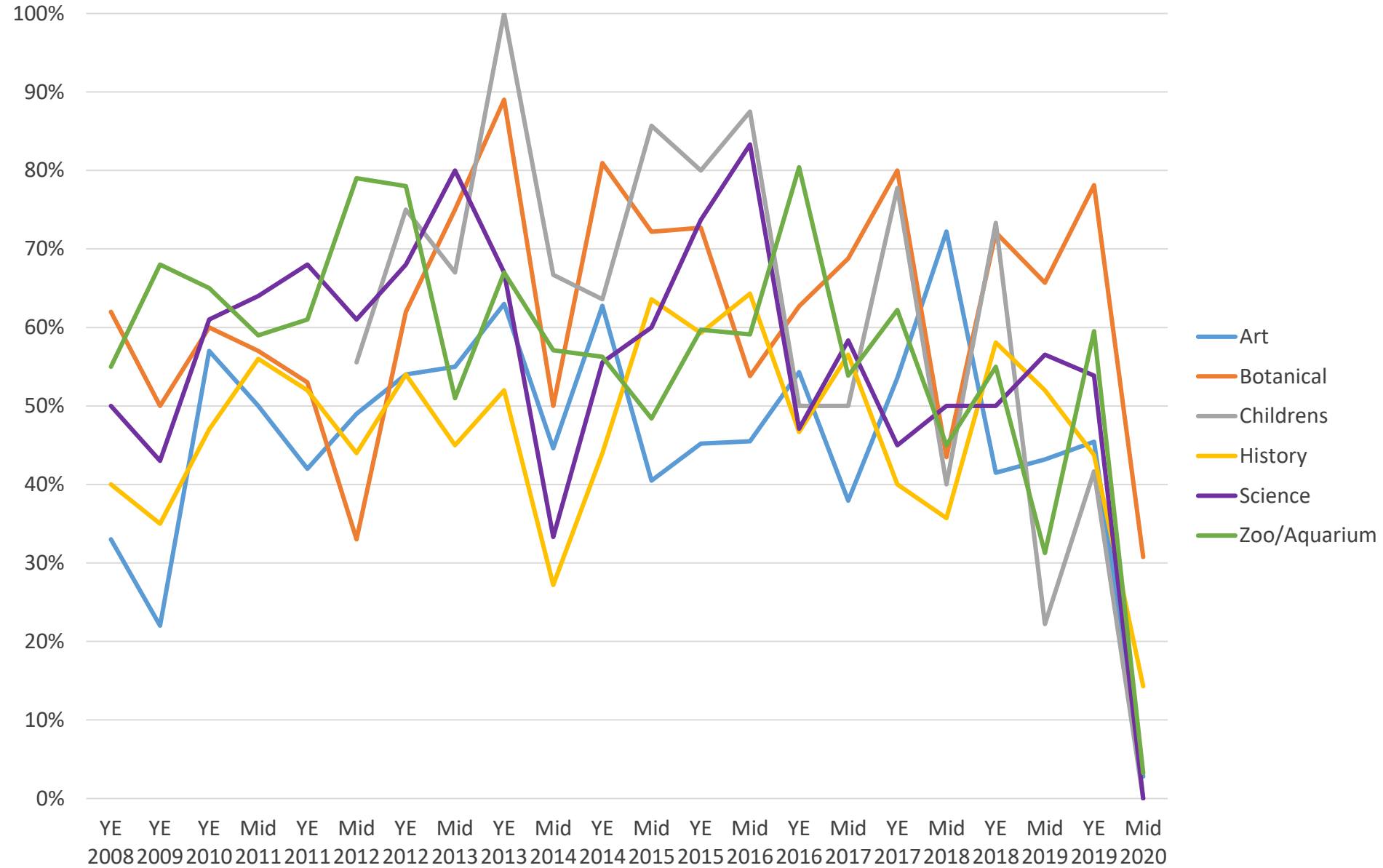


Trends by Niche Audience

Pulse 2020 Mid-Year Data

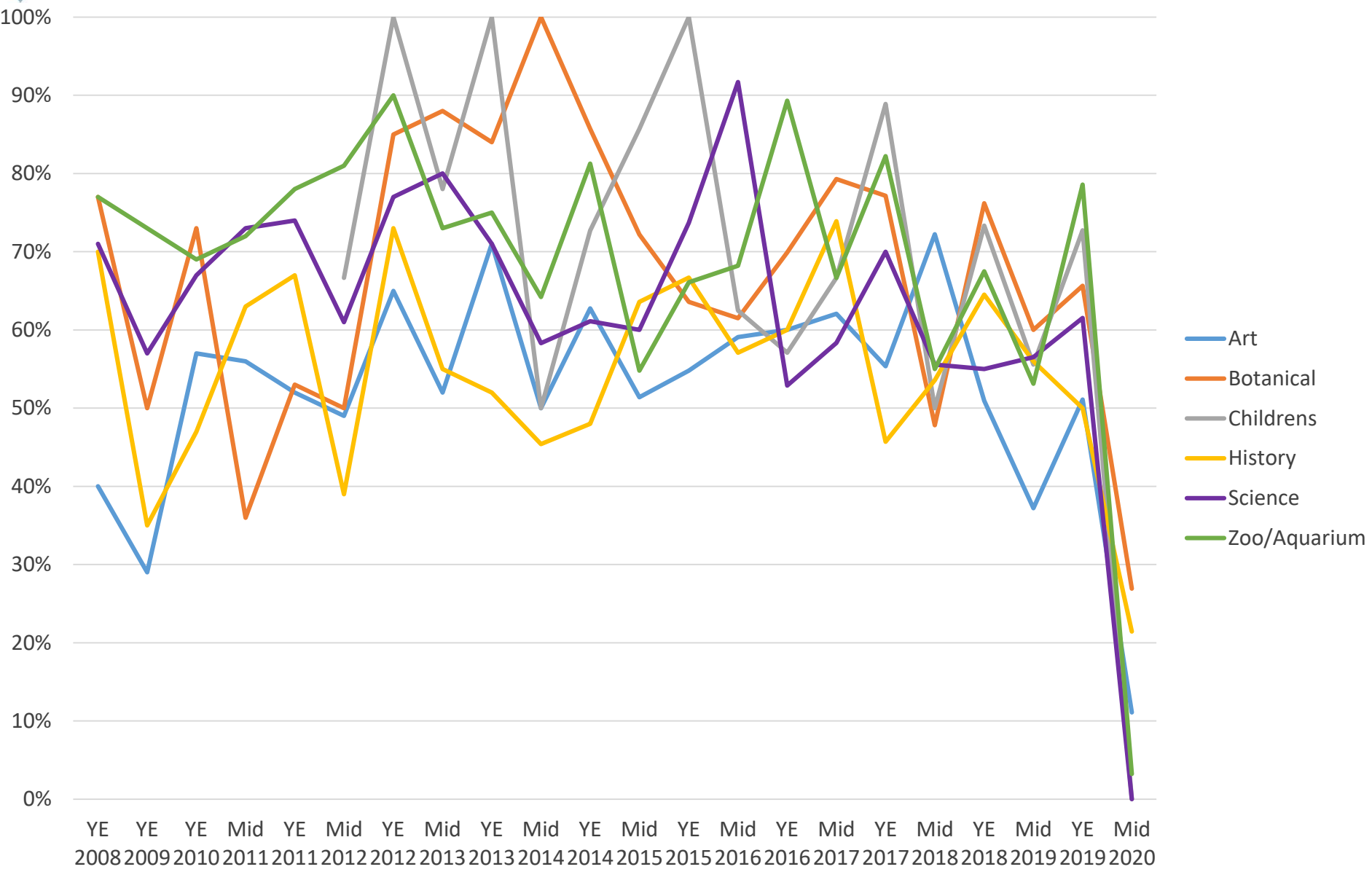


Membership increase from last year



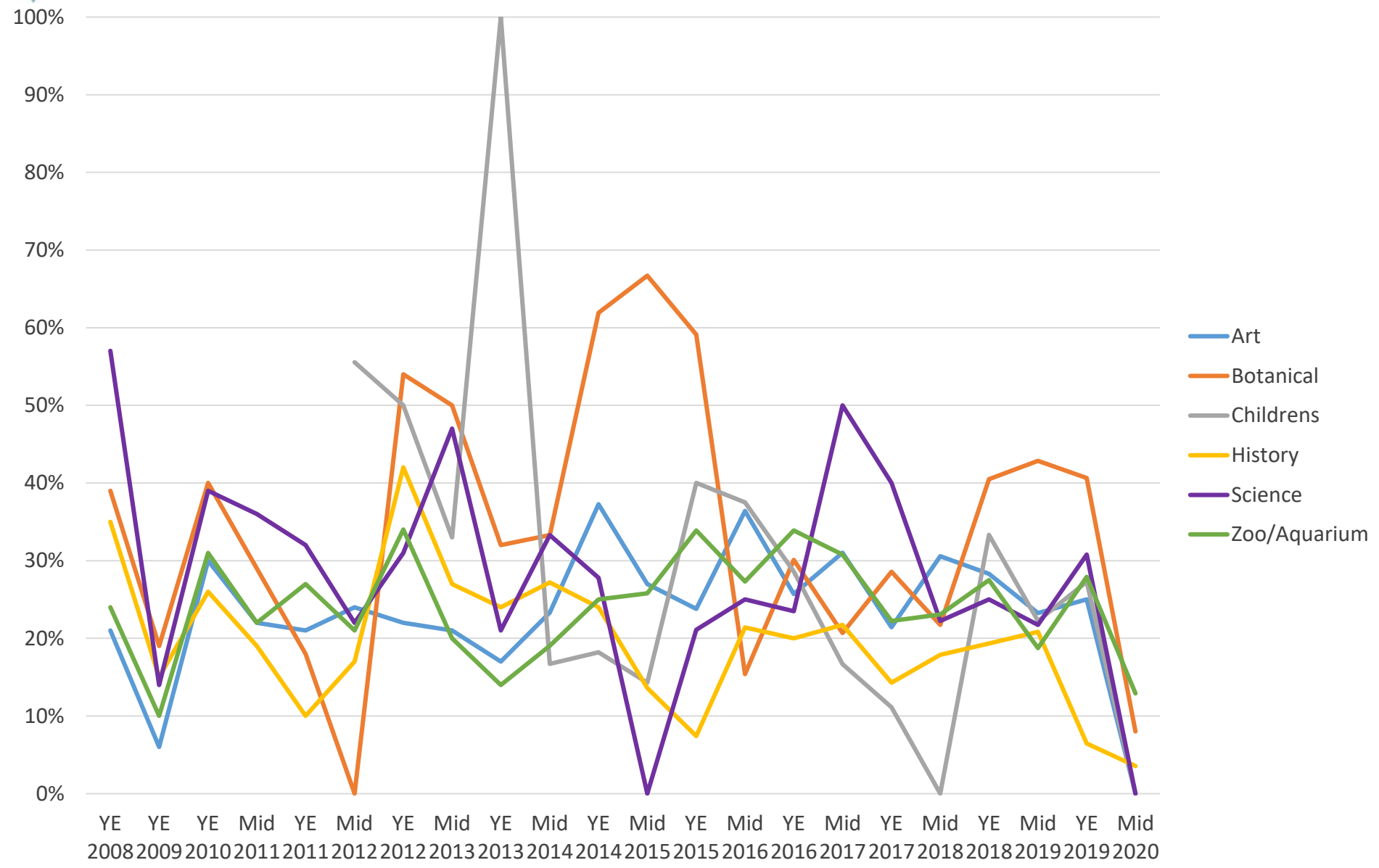


Increased Revenue over last year



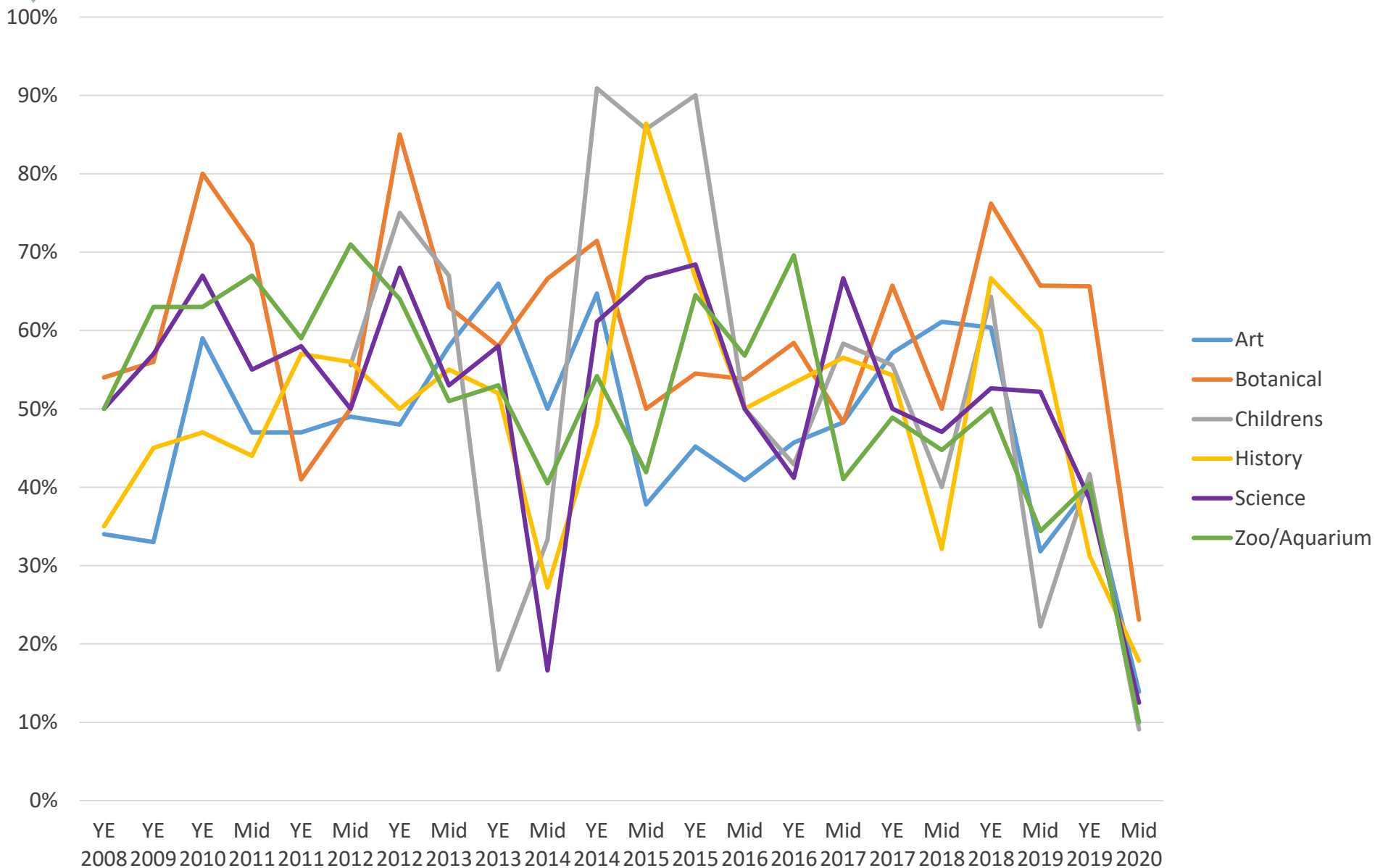


Budgets Increased over last year



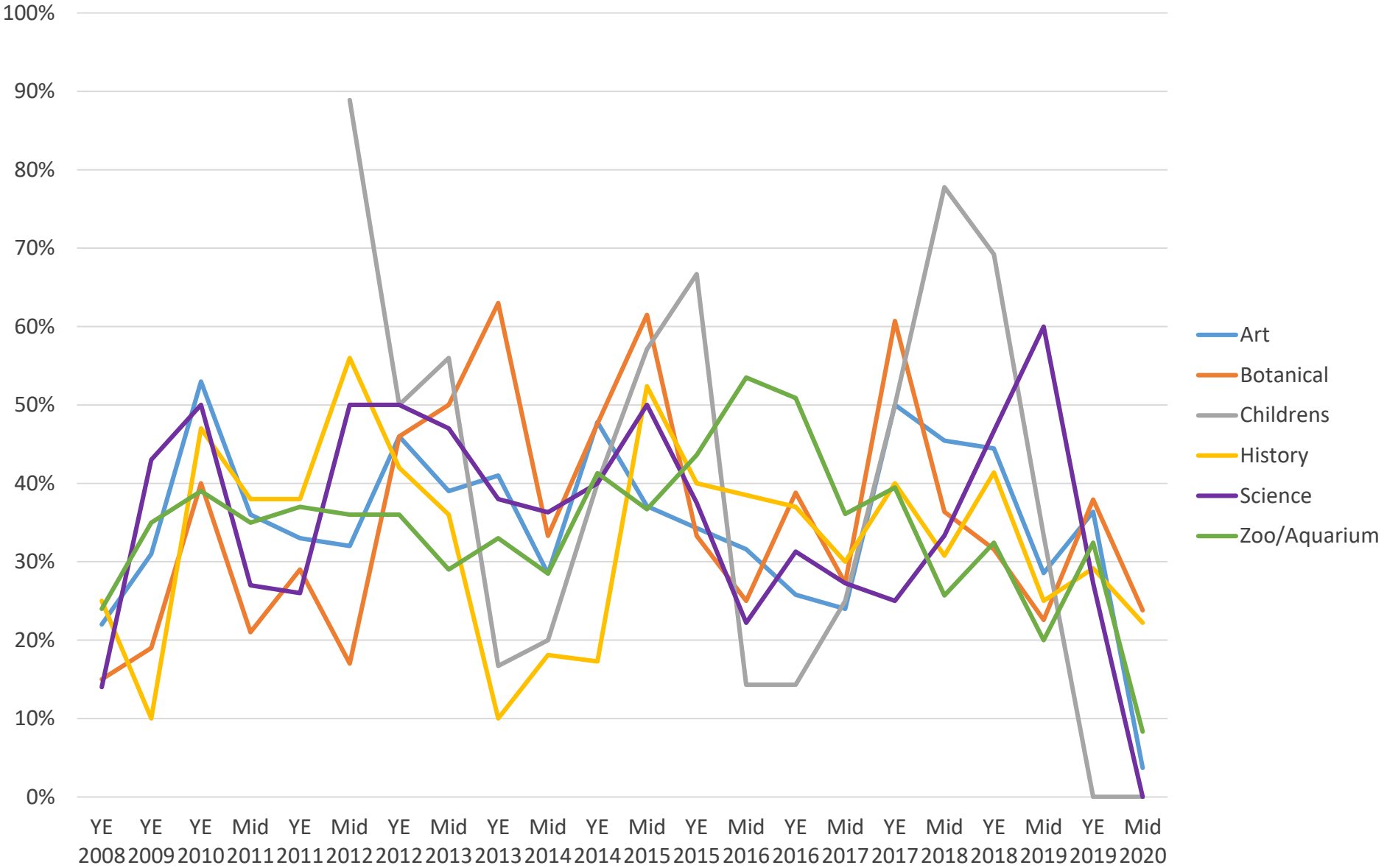


More new members this year than last year



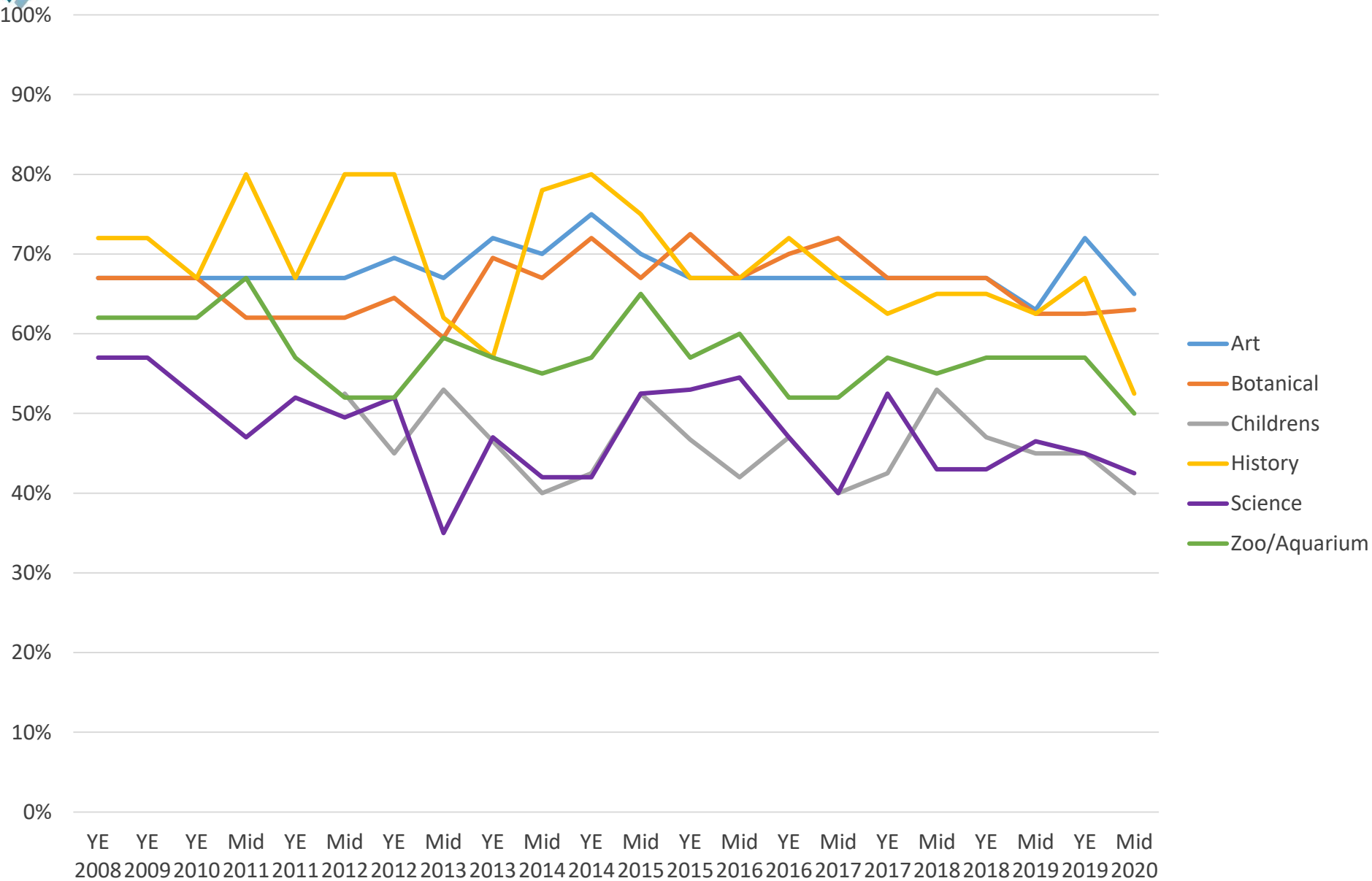


Renewal rates improved this year over last





Median Renewal Rate





Highlights – Gardens and Arboreta

- Reported *decrease*
 - 61.5% membership totals
 - 65.5% revenues
 - 60% expenditure budgets
 - 69% new members
 - 80% visitation
 - 43% renewals
- Median Renewal Rate = 63%



Highlights – History Museums

- Reported *decrease*
 - 71.5% membership totals
 - 68% revenues
 - 50% expenditure budgets
 - 71.5% new members
 - 100% visitation
 - 66% renewals
- Median Renewal Rate = 53%



Highlights – Art Museums

- Reported *decrease*
 - 86% membership totals
 - 69.5% revenues
 - 53% expenditure budgets
 - 88% new members
 - 100% visitation
 - 70% renewals
- Median Renewal Rate = 65%



Highlights – Zoos and Aquariums

- Reported *decrease*
 - 93.5% membership totals
 - 97% revenues
 - 74% expenditure budgets
 - 83% new members
 - 83% visitation
 - 84% renewals
- Median Renewal Rate = 50%



Highlights – Science Museums

- Reported *decrease*
 - 94% membership totals
 - 94% revenues
 - 73.5% expenditure budgets
 - 81% new members
 - 100% visitation
 - 100% renewals
- Median Renewal Rate = 43%



Highlights – Children’s Museums

- Reported *decrease*
 - 100% membership totals
 - 100% revenues
 - 90% expenditure budgets
 - 82% new members
 - 100% visitation
 - 89% renewals
- Median Renewal Rate = 40% or below

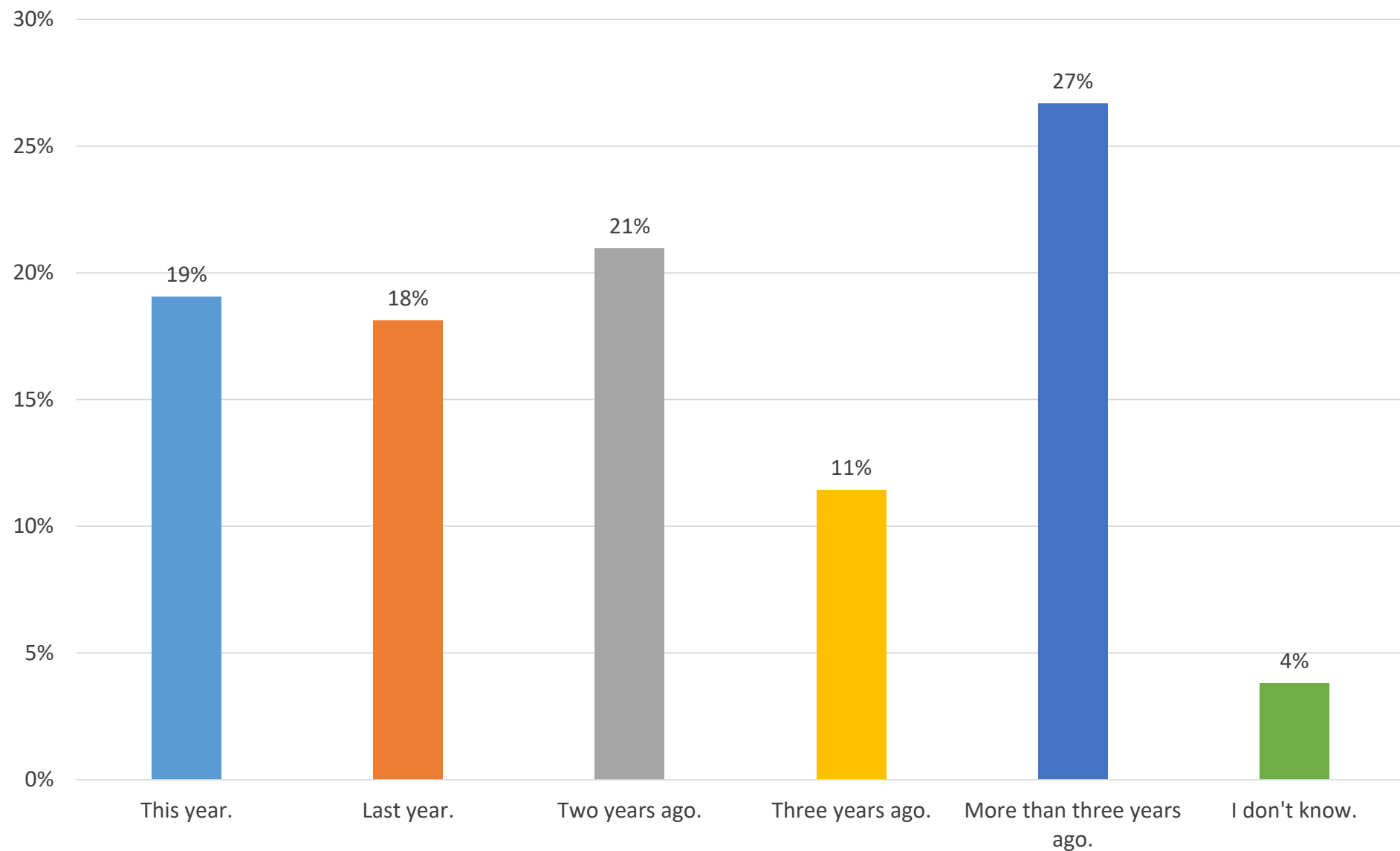


Dues, Categories and Benefits

Pulse 2020 Mid-Year Data

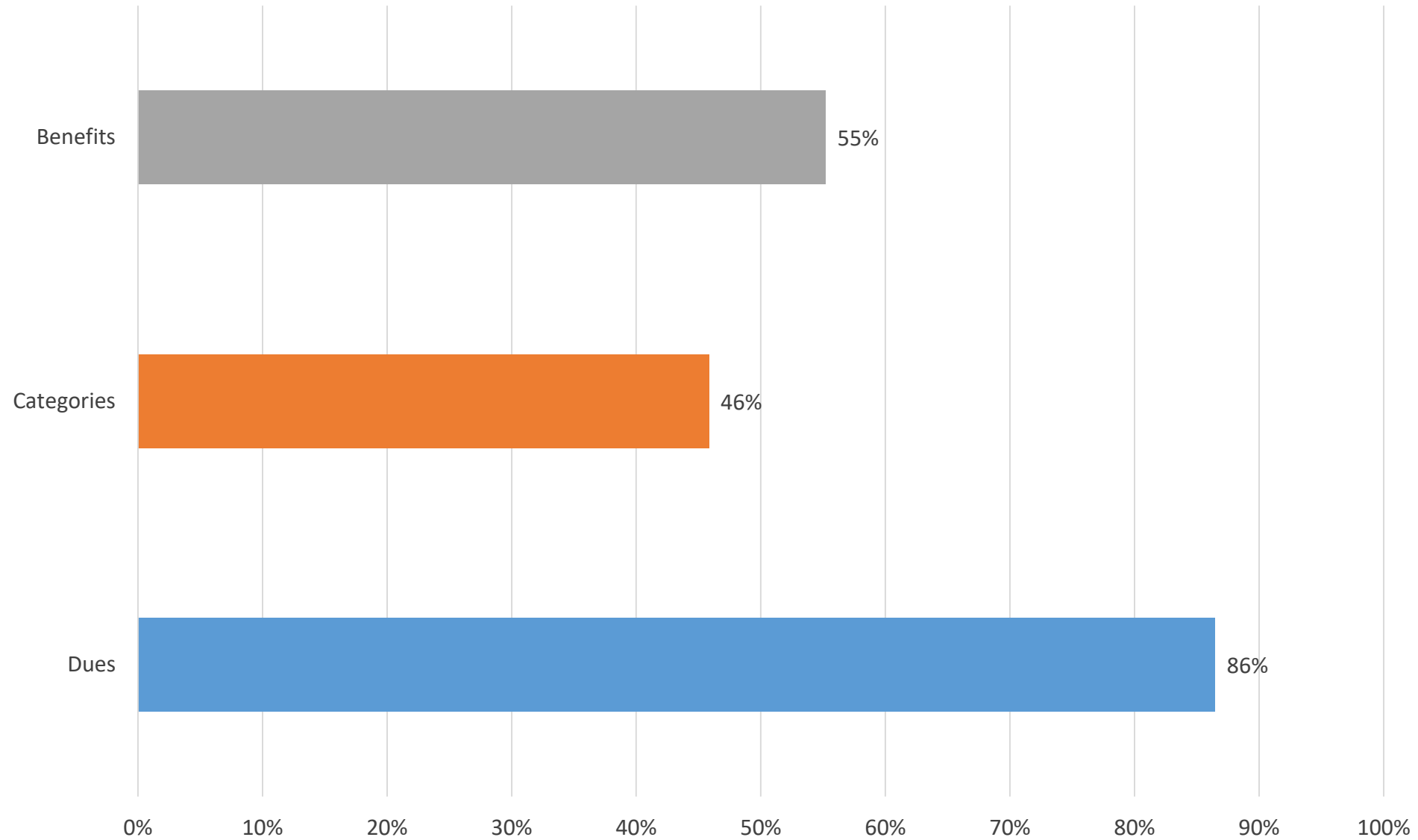


When was the last time your organization changed your dues, categories or benefit offerings?



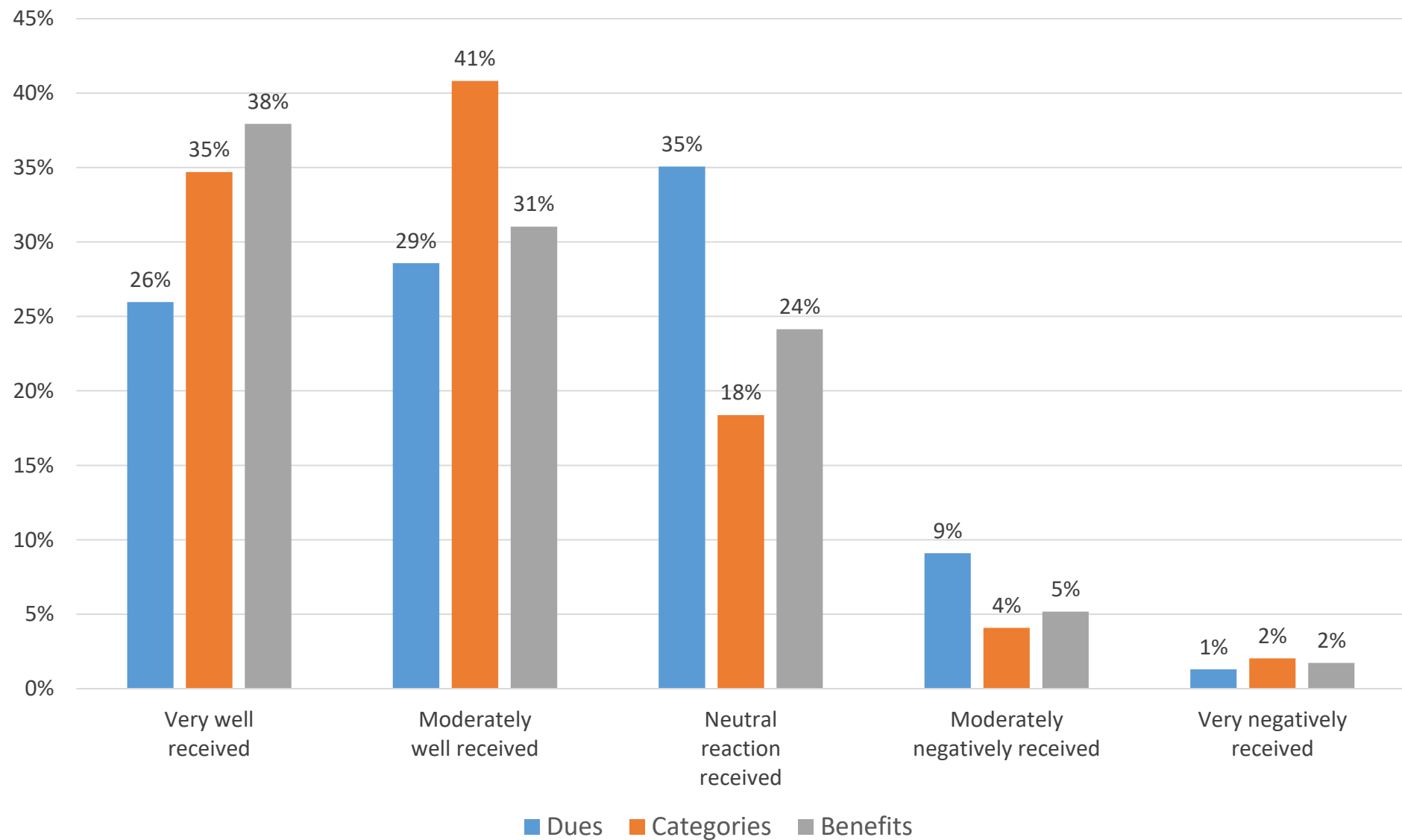


When you made these changes, what aspects did you change? (Check all that apply.)





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



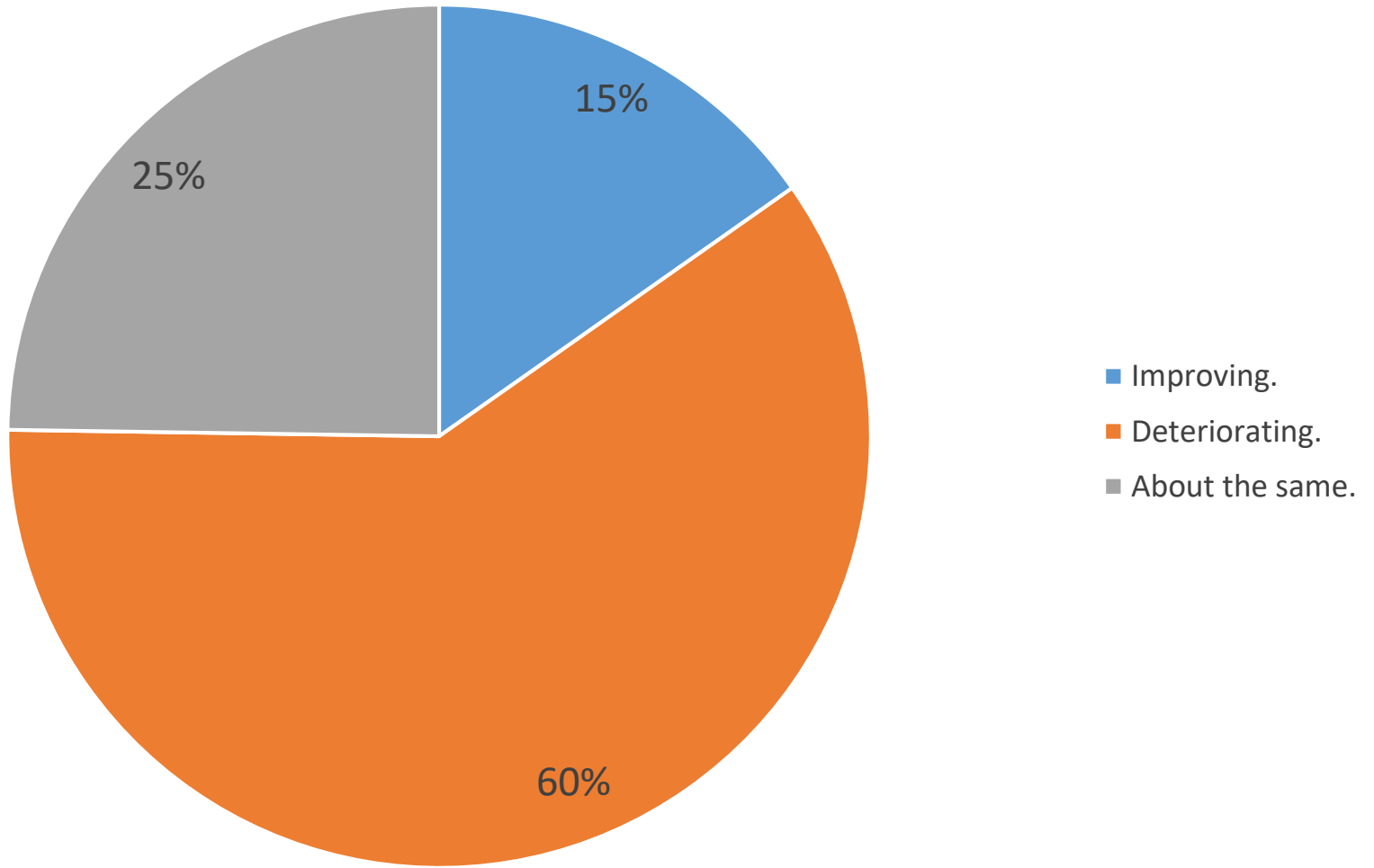


Membership Forward

Pulse 2020 Mid-Year Data

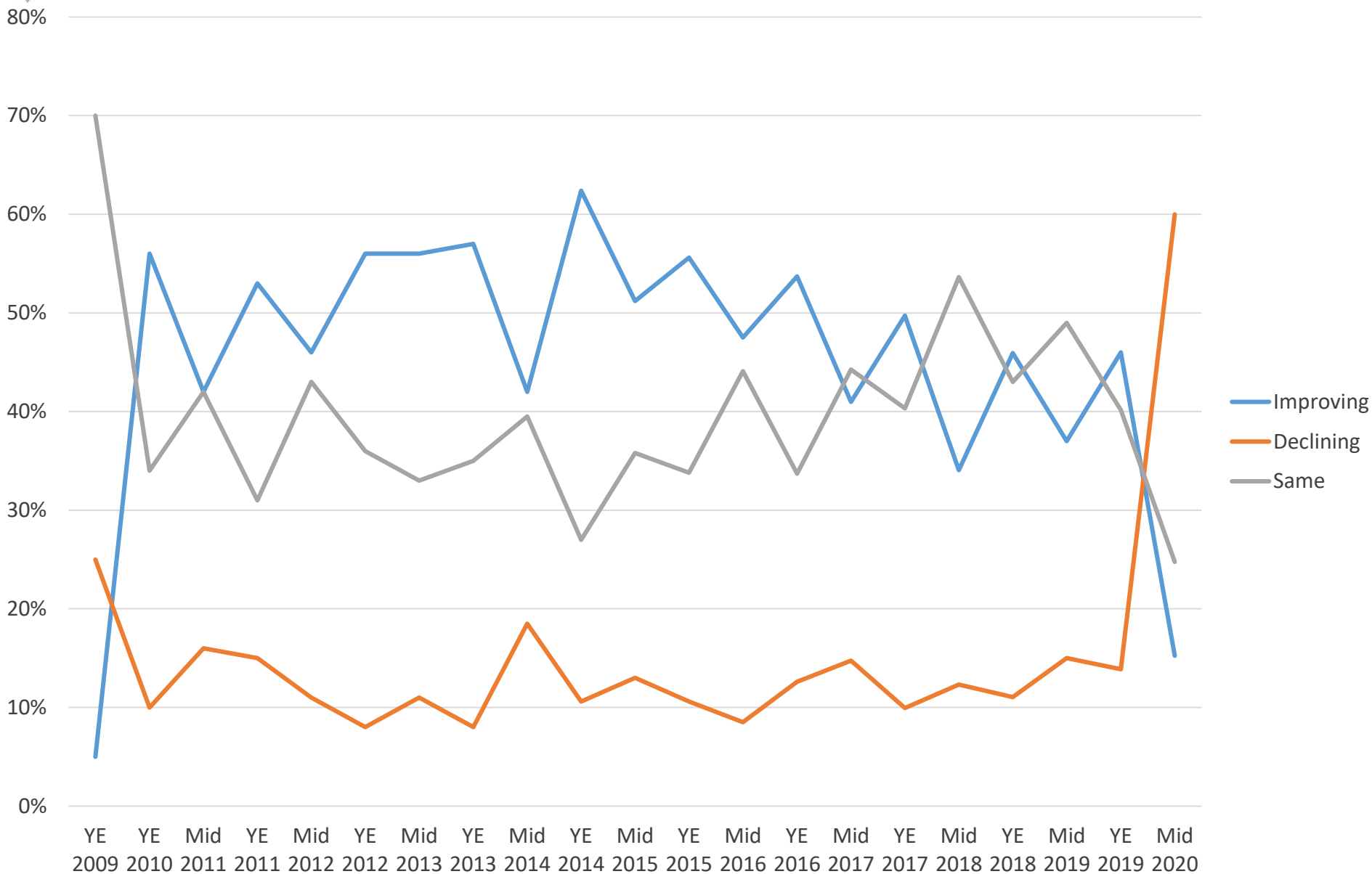


In your professional opinion, comparing last year to this year, the membership climate is...





Membership Future Outlook





Best Practices

- Increase digital efforts for all areas of membership
- For acquisition, you should use a mix of on-site, direct mail, and email, digital channels; find ways to address on-site challenges
- Renewals should include snail mail AND email; add Facebook & digital touches
- Email stand alone membership promotions monthly; utilize new email addresses collected from online reservations
- Increase usage of website & digital platform reporting & analytics
- 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



Silver Lining

- Importance of membership
 - Cashflow during closures
 - Some members philanthropic
 - Some members more mission-oriented and less transactional
- Digital usage increase
- Increased communications
- Increased usage of digital cards
- Email collection from reserved ticketing
- Cashflow from renewals



Going Forward ...

- Stay positive!
- Fight for your budget
- Be more promotional
- Work with Marketing
- Communicate with lapsed members more often
- Stick to what works!
 - Combining direct mail, email and digital communications and promotions for new and renewing members



Please fill
out our
survey!



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Questions?

Thank you!

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