



# Covid-19 Membership Impact Survey 2020

Results from May - September, 2020 surveys

Thursday, October 1, 2020



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Karen Meyer  
Account Manager, Direct Mail



Dana Hines  
Vice President, Membership Marketing



# The Demographics

## Q1: What type of organization does your membership serve?

	May	June	July	August	September
Aquarium	5.70%	3.63%	5.10%	5.23%	4.94%
Art Museum	26.32%	26.94%	25.00%	27.91%	29.01%
Association	3.07%	2.59%	1.53%	1.74%	1.23%
Botanical Garden/Arboretum	13.60%	18.13%	16.33%	20.35%	19.14%
Children's Museum	7.02%	4.66%	7.14%	8.72%	8.64%
Conservation/Nature Organization	3.95%	3.11%	4.59%	2.91%	3.09%
History Museum	16.67%	15.54%	18.37%	12.21%	19.14%
Library	0.44%	1.55%	0.51%	0.58%	1.85%
Performing Arts/Cultural Arts	2.19%	5.70%	1.53%	1.16%	0.00%
Science Museum/Center	15.35%	8.81%	14.29%	12.79%	12.35%
Zoo	19.74%	14.51%	19.39%	18.60%	19.75%
Other (please specify)	7.02%	8.29%	7.14%	6.40%	8.64%

## Q21: How many members does your organization have?

	May	June	July	August	September
Under 5,000	52.07%	50.00%	52.75%	51.57%	51.32%
5,000 to 10,000	17.05%	23.33%	16.48%	16.98%	19.74%
10,001 to 25,000	17.05%	15.00%	18.13%	21.38%	18.42%
25,001 to 50,000	7.83%	8.33%	9.34%	8.18%	5.26%
over 50,000	5.99%	3.33%	3.30%	1.89%	5.26%

## Q22: What is your geographic location?

	May	June	July	August	September
Northeastern US	16.67%	16.11%	13.33%	13.29%	19.74%
East Coast US	6.94%	7.78%	5.00%	3.80%	3.95%
Southeastern US	12.04%	15.56%	15.56%	18.35%	15.79%
Midwestern US	27.78%	28.89%	26.67%	25.32%	27.63%
Mountain States US	3.24%	3.33%	3.89%	6.33%	2.63%
Southwestern US	10.65%	9.44%	15.56%	17.72%	10.53%
West Coast US	16.67%	14.44%	17.22%	13.92%	14.47%
National	0.46%	1.67%	1.67%	0.00%	0.00%
International	5.56%	2.78%	1.11%	1.27%	5.26%

## Q2: Did your organization experience a closure as a result of the Covid-19 pandemic?

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	May	June	July	August	September
Yes	94.71%	93.78%	93.88%	94.19%	94.19%
No	2.64%	3.11%	3.06%	2.33%	2.33%
Only a partial closure	2.64%	3.11%	3.06%	3.49%	3.49%

### Q3: What is you institution's current status?

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	May	June	July	August	September
Closed	92.07%	64.58%	31.63%	20.35%	<b>10.00%</b>
Open	3.08%	22.92%	53.57%	65.12%	<b>73.13%</b>
Partially closed	4.85%	12.50%	13.27%	13.95%	15.00%
We Reopenend, but had to close again			1.53%	0.58%	1.88%





## Q4: Comparing membership totals NOW vs same time last year, your membership totals have ...

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	May	June	July	August	September
Increased from the previous year.	4.41%	9.33%	12.37%	32.09%	<b>38.19%</b>
Decreased from the previous year.	71.37%	77.20%	70.62%	47.76%	<b>37.50%</b>
Stayed the same as the previous year.	11.45%	6.74%	15.46%	11.19%	14.58%
Unsure at this time.	12.78%	6.74%	1.55%	8.96%	9.72%

## Q5: In comparing membership revenues this year vs last year at this same time, your membership revenues have ...

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	May	June	July	August	September
Increased over the previous year's revenues.	5.29%	8.85%	14.95%	12.28%	9.94%
Decreased from the previous year's revenues.	77.97%	78.65%	74.23%	76.61%	76.40%
Revenues are about the same as the previous year.	8.37%	6.77%	6.70%	7.60%	8.07%
Unsure at this time.	8.37%	5.73%	4.12%	3.51%	5.59%



## Q6: Since the arrival of the Covid-19 pandemic, my membership expenditure budget has ...

	May	June	July	August	September
Increased.	0.44%	0.52%	1.55%	1.74%	0.62%
Decreased.	50.44%	51.83%	58.25%	62.21%	<b>63.58%</b>
Stayed about the same.	32.74%	32.98%	29.38%	30.23%	27.16%
Unknown at this time.	16.37%	14.66%	10.82%	5.81%	8.64%

## Q8: How have your membership and development staffs been affected during the Covid 19 pandemic? (Check all that apply.)

	May	June	July	August	September
No change in staffing levels.	58.15%	54.92%	51.53%	53.49%	<b>43.13%</b>
Staffing levels have increased.	0.00%	0.52%	1.02%	2.33%	1.88%
Staffing levels have decreased.	20.26%	24.35%	<b>31.12%</b>	31.98%	<b>39.38%</b>
Staff members have been furloughed or laid off.	33.04%	30.05%	34.69%	31.40%	<b>36.88%</b>
Salary cuts have been taken.	16.74%	20.73%	21.43%	20.35%	23.13%

## Q10: What is the status of any new member acquisition efforts during the Covid-19 pandemic? (Check all that apply.)

	May	June	July	August	September
Direct mail campaign continued as planned.	16.28%	22.22%	24.32%	25.32%	25.33%
Direct mail campaign was delayed.	24.19%	22.22%	25.41%	20.25%	26.67%
Direct mail campaign was canceled.	14.88%	12.78%	17.30%	17.72%	15.33%
We had no plans for a direct mail campaign.	33.95%	37.22%	27.57%	32.28%	26.00%
Email acquisition Campaign continued as planned.	27.91%	24.44%	37.84%	34.18%	36.67%
Email acquisition campaign was delayed.	29.77%	24.44%	21.62%	24.05%	22.00%
Email acquisition campaign was canceled.	4.19%	6.11%	7.57%	5.70%	6.00%
We had no plans for an email acquisition campaign.	26.51%	31.11%	19.46%	20.89%	17.33%
Digital acquisition ad campaign continued as planned.	15.35%	12.22%	22.70%	21.52%	19.33%
Digital acquisition ad campaign was delayed.	20.00%	17.78%	14.59%	13.29%	14.67%
Digital acquisition ad campaign was canceled.	7.91%	7.78%	8.11%	8.23%	8.67%
We had no plans for a digital acquisition ad campaign.	38.60%	41.67%	37.30%	39.24%	31.33%
Other (please specify)	10.70%	5.00%	7.57%	6.96%	4.67%

**Q10: What is the status of any new member acquisition efforts during the Covid-19 pandemic? (Check all that apply.)**

	August	September
Lapsed Member campaign	37.33%	74.83%
New Member Acquisition Campaign	19.33%	45.03%
Upgrade Campaign	2.00%	26.49%
Special Appeal	9.33%	24.50%
Year End Annual Fund Appeal	21.33%	63.58%
Gift Membership Campaign	10.67%	52.98%
Other (please specify)		0.00%

If you are going to perform any of the campaigns just listed, what channel(s) will you be using?

	September	
Direct Mail	70.86%	
Email	92.05%	
Digital or Social Media	74.17%	
On-site sales	43.71%	
Telemarketing	7.28%	
In Person asks	19.21%	
Other (please specify)	5.96%	

## Q11: With respect to renewal notices during the Covid-19, what were/are you able to do during this time? (Check all that apply.)

	May	June	July	August	September
Continued renewal notices as usual.	53.99%	54.70%	57.30%	60.76%	60.00%
Continued renewals, but on a limited basis.	16.90%	17.68%	15.14%	12.66%	12.00%
Continued renewals, but only email, not mailed notices.	22.07%	18.23%	21.62%	17.09%	19.33%
Continued renewals, but only mailed notices, no emails.	1.88%	2.76%	1.08%	1.27%	0.67%
Was not able to continue sending renewal notices at all.	9.39%	12.71%	5.95%	6.96%	6.00%
Now that we have reopened, we are back on track with our pre-Covid 19 renewal schedule and renewal touches			10.81%	12.03%	18.67%
We have reopened, but we are still not up to full speed on renewal notices			9.19%	10.13%	3.33%



# If you have reopened, have you been able to return to previous renewal timing and strategy?

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	August	September
Yes	73.48%	81.20%
No	26.52%	18.80%

## With respect to renewal revenues during this time, what results are you experiencing so far?

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	August	September
Increased renewal revenues.	8.86%	11.33%
Decreased renewal revenues.	72.15%	66.67%
No change in renewal revenues.	8.86%	7.33%
Not sure at this time.	10.13%	14.67%

## Q13: What is your anticipated reopening date?

Answer Choices	May	June	July	Responses	Responses
already reopened	2.76%	20.44%	46.41%	65.00%	68.87%
May 1 - 15	0.46%	0.55%	0.55%	0.00%	0.00%
May 16 - 31	11.98%	2.76%	0.55%	5.00%	5.30%
June 1 - 15	20.74%	8.29%	9.94%	3.75%	3.31%
June 16 - 30	10.14%	13.26%	0.55%	2.50%	1.99%
July 1 - 15	14.29%	23.76%	1.10%	0.63%	0.66%
July 16 - 31	1.38%	6.08%	4.42%	2.50%	1.32%
August 1 - 15	0.92%	2.21%	3.87%	0.63%	0.00%
August 16 - 31	0.46%	0.55%	3.87%	1.25%	0.66%
September or later	9.68%	8.29%	11.60%	11.88%	7.28%
I don't know	27.19%	13.81%	17.13%	6.88%	10.60%

## Q14: Have you asked your members, donors or prospects to give in a special appeal during this time? (Check all that apply.)

Answered: 215 Skipped: 12

	May	June	July	August	September
Yes, via direct mail.	24.07%	32.96%	32.07%	40.51%	35.76%
Yes, via email.	62.96%	63.69%	62.50%	68.99%	67.55%
Yes, via a digital, social media campaign.	43.52%	44.13%	41.30%	47.47%	37.09%
Yes via #GivingTuesdayNow.	47.22%	40.22%	33.15%	32.91%	24.50%
Not yet, but we will.	7.87%	3.35%	11.41%	6.96%	9.93%
Not yet, but not sure we will.	13.89%	14.53%	13.59%	12.03%	15.89%

## Q15: Has the Membership Department been involved in planning for a reopening?

	May	June	July	August	September
Yes	71.30%	77.90%	79.78%	77.99%	80.54%
No	14.35%	16.02%	13.66%	16.35%	10.74%
I don't know	2.78%	3.31%	2.73%	1.89%	5.37%
Other (please specify)	12.96%	5.52%	5.46%	6.92%	5.37%

## Q16: If you have been involved in that planning, what steps will your organization be taking? (Check all that apply.)

	May	June	July	August	September
Offering special member only hours or opening days.	63.83%	65.27%	66.28%	67.36%	64.03%
Requiring members to have reserved entry times.	53.72%	56.89%	65.70%	65.28%	61.87%
Timed tickets for visitors.	62.23%	62.87%	66.28%	68.06%	68.35%
Limiting number of visitors.	81.38%	81.44%	84.30%	88.19%	84.17%
Ensuring special safety measures like social distancing, staff with gloves and masks, special cleaning measures,	86.17%	90.42%	94.19%	94.44%	94.96%
Requiring masks for all visitors.	44.68%	65.87%	83.14%	84.03%	82.01%
Other (please specify)	21.81%	16.17%	16.86%	9.72%	12.23%

## Q17: During this time of the Covid-19 closure, how have you handled communications with members and others?

	May	June	July	August	September
Communicated on our usual schedule	19.35%	24.31%	22.70%	31.88%	24.50%
Increased the frequency of communications	72.81%	70.72%	69.19%	59.38%	67.55%
Decreased the frequency of communications	7.83%	4.97%	8.11%	8.75%	7.95%

## Q18: Have you or will you be offering members additional months of membership?

	May	June	July	August	September
Yes, one extra month	3.23%	3.33%	5.91%	5.63%	6.58%
Yes, two extra months	15.21%	17.22%	11.83%	16.88%	13.82%
Yes, three additional months	17.51%	21.11%	23.12%	24.38%	25.66%
Yes, but it varies	36.87%	30.56%	38.17%	27.50%	32.24%
No	12.90%	16.67%	15.59%	20.63%	16.45%
Not sure at this time	14.29%	11.11%	5.38%	5.00%	5.26%



## Q19: Have you added any membership benefits or online offerings as a result of the Covid-19 closures and challenges? (Check all that apply.)

	May	June	July	August	September
Virtual tours, behind the scenes experiences	47.74%	55.90%	48.80%	47.26%	55.56%
Daily or weekly collection highlights	40.20%	36.65%	30.72%	28.77%	33.33%
Online programs, lectures or content	58.29%	67.70%	71.69%	69.18%	67.36%
Members days or early entry once reopened	31.16%	39.13%	43.37%	43.15%	48.61%
Educational programs for children	45.73%	50.31%	47.59%	50.00%	51.39%
Entertaining and engaging social media posts	71.36%	67.08%	70.48%	63.01%	64.58%
Other (please specify)	11.56%	6.83%	9.04%	4.11%	7.64%

## Q20: In this year, I am able to (check all that apply) ...

	May	June	July	August	September
Attend membership/association conferences in other cities.	2.80%	0.56%	1.10%	1.27%	1.97%
Attend membership/association conferences within driving distance.	3.27%	2.22%	0.55%	2.53%	4.61%
Participate in webinars.	79.44%	79.44%	81.87%	81.65%	82.89%
I cannot attend conferences.	26.17%	29.44%	34.07%	29.75%	24.34%
Our travel and conference attendance budgets have been frozen.	39.72%	46.67%	45.05%	47.47%	45.39%
I am not sure at this time.	28.04%	25.00%	14.84%	6.33%	6.58%
Other (please specify)	2.80%	1.11%	2.75%	3.16%	3.29%



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# **Please participate in the Membership Consultants' Pulse of Membership Survey to be sent soon.**

We need your data to share with the Membership community!

Take care and be well!



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**Questions?**



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**Dana Hines**     [Dana@membership-consultants.com](mailto:Dana@membership-consultants.com)

**Karen Meyer**     [Karen.Meyer@gabrielgroup.com](mailto:Karen.Meyer@gabrielgroup.com)