



Pulse of Membership Survey Recap

2022 MID-YEAR SURVEY RESULTS

AND

MEMBERSHIP TRENDS



Introductions



- Dana Hines
 - President



- Tabetha Pund
 - Strategic Planning & Project Manager



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!

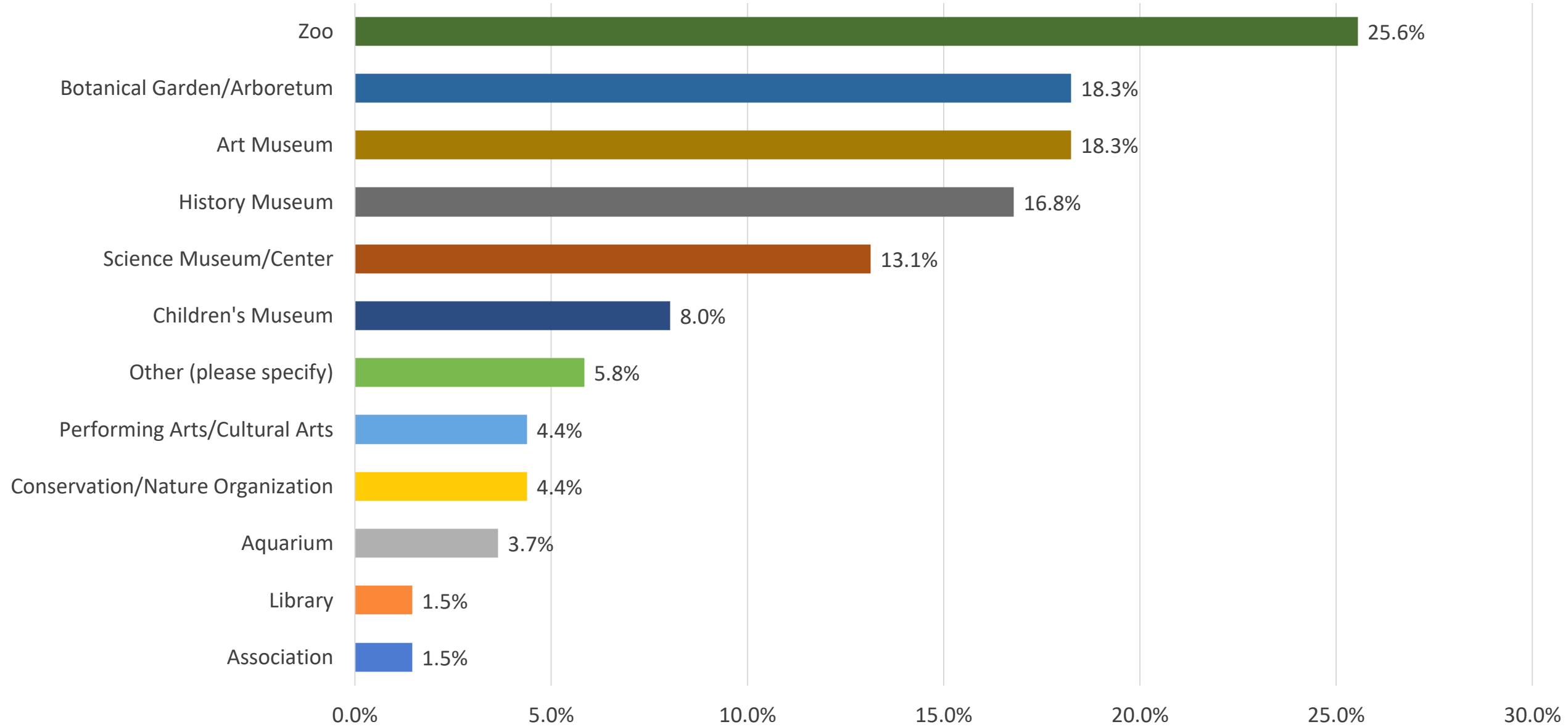


Demographics

Pulse 2022 Mid-Year Data

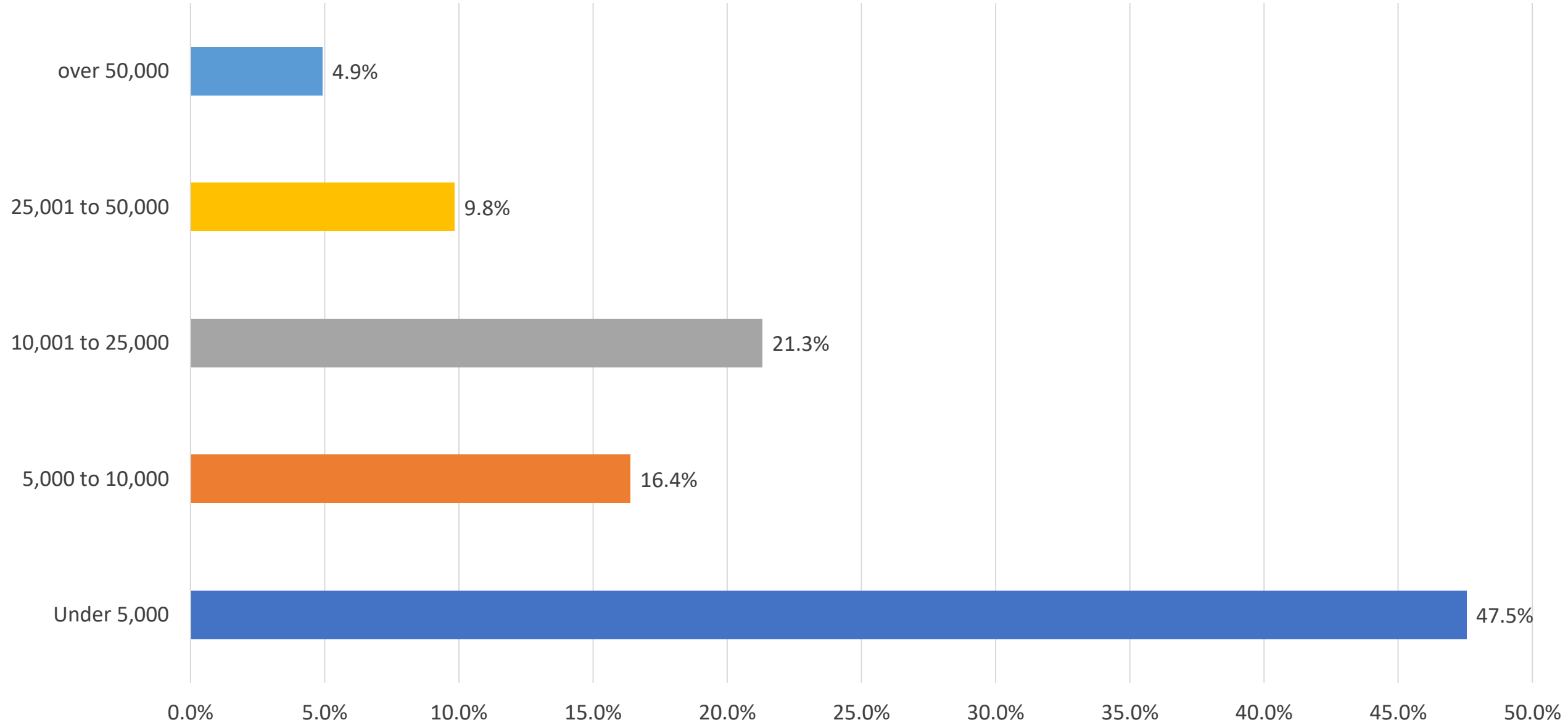


What type of organization does your membership serve?





How many members does your organization have?





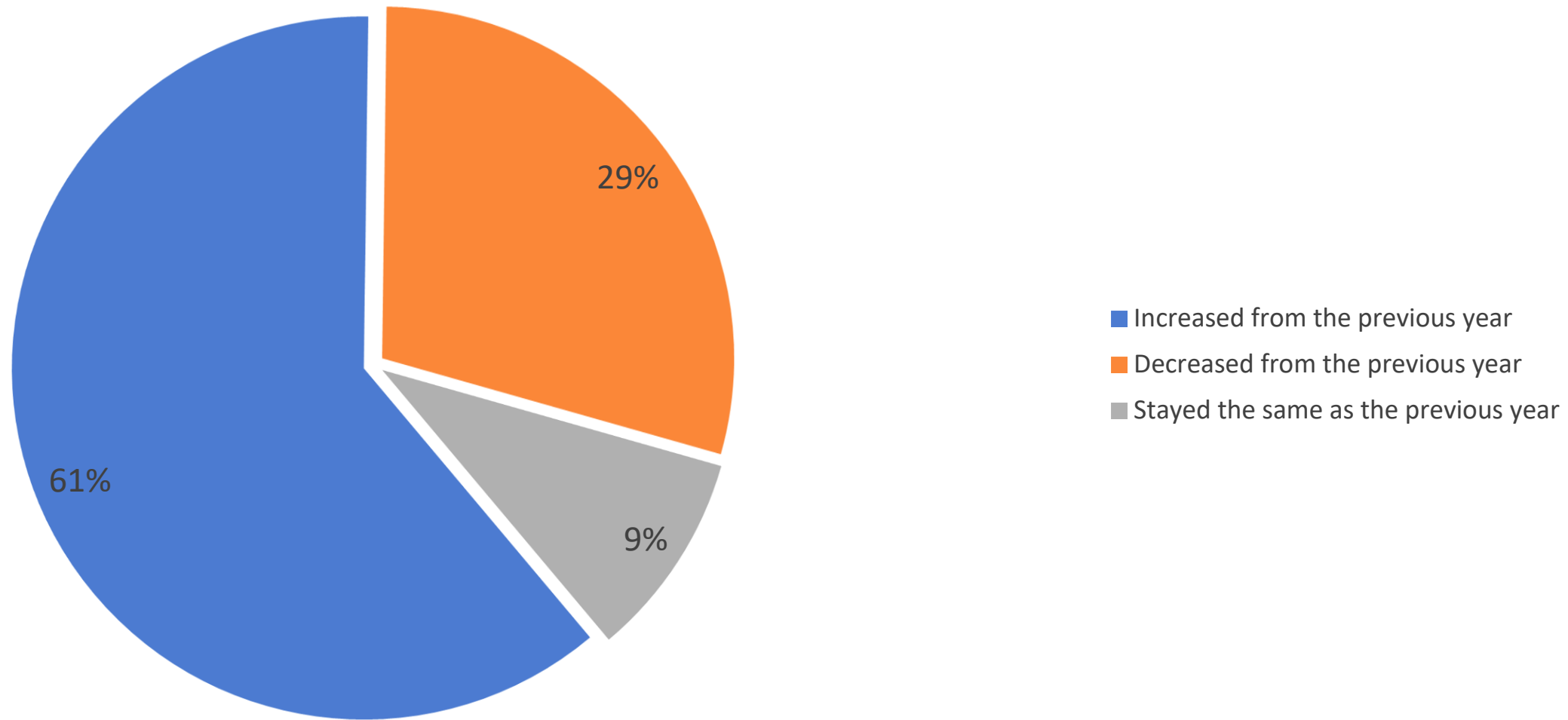
Trends

Pulse 2022 Mid-Year Data



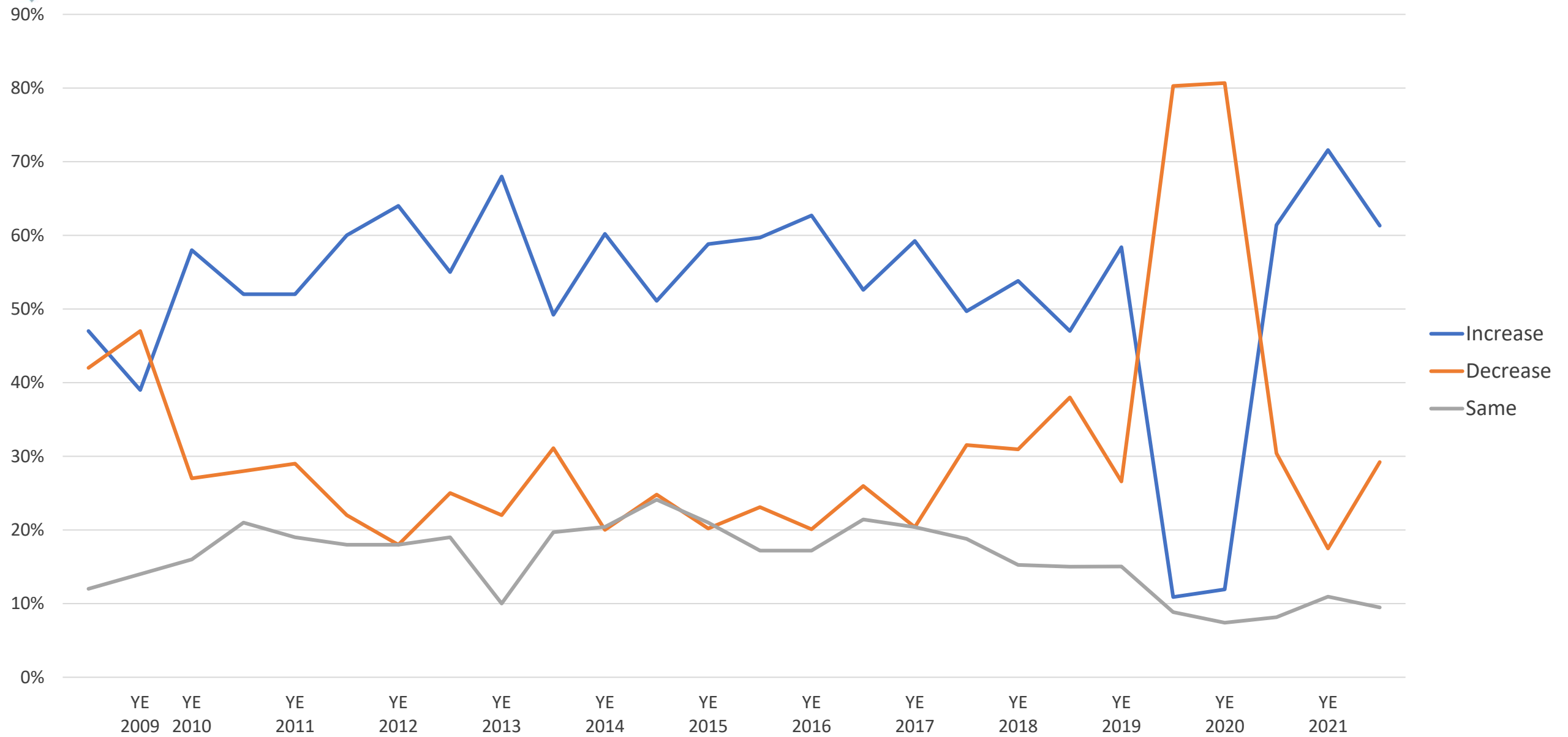


Comparing mid-year membership totals for 2022 to mid-year membership totals for 2021, your membership totals...



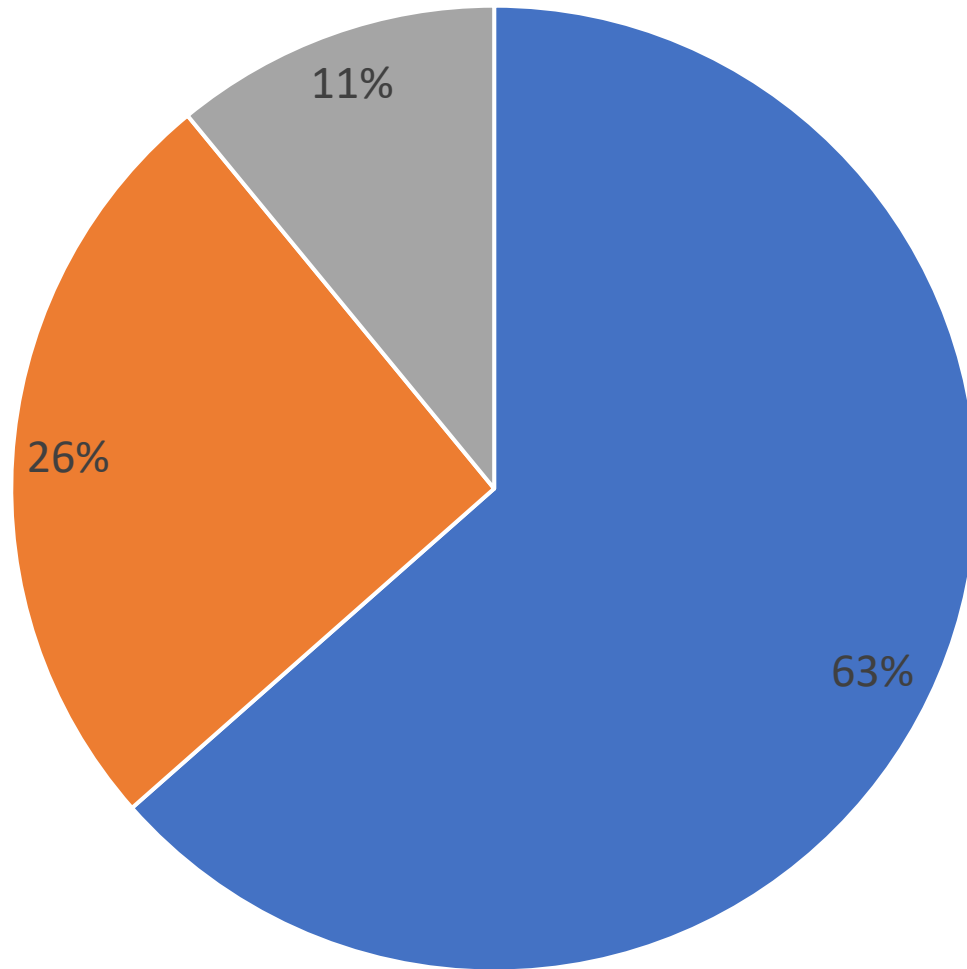


Membership Totals from Year to Year





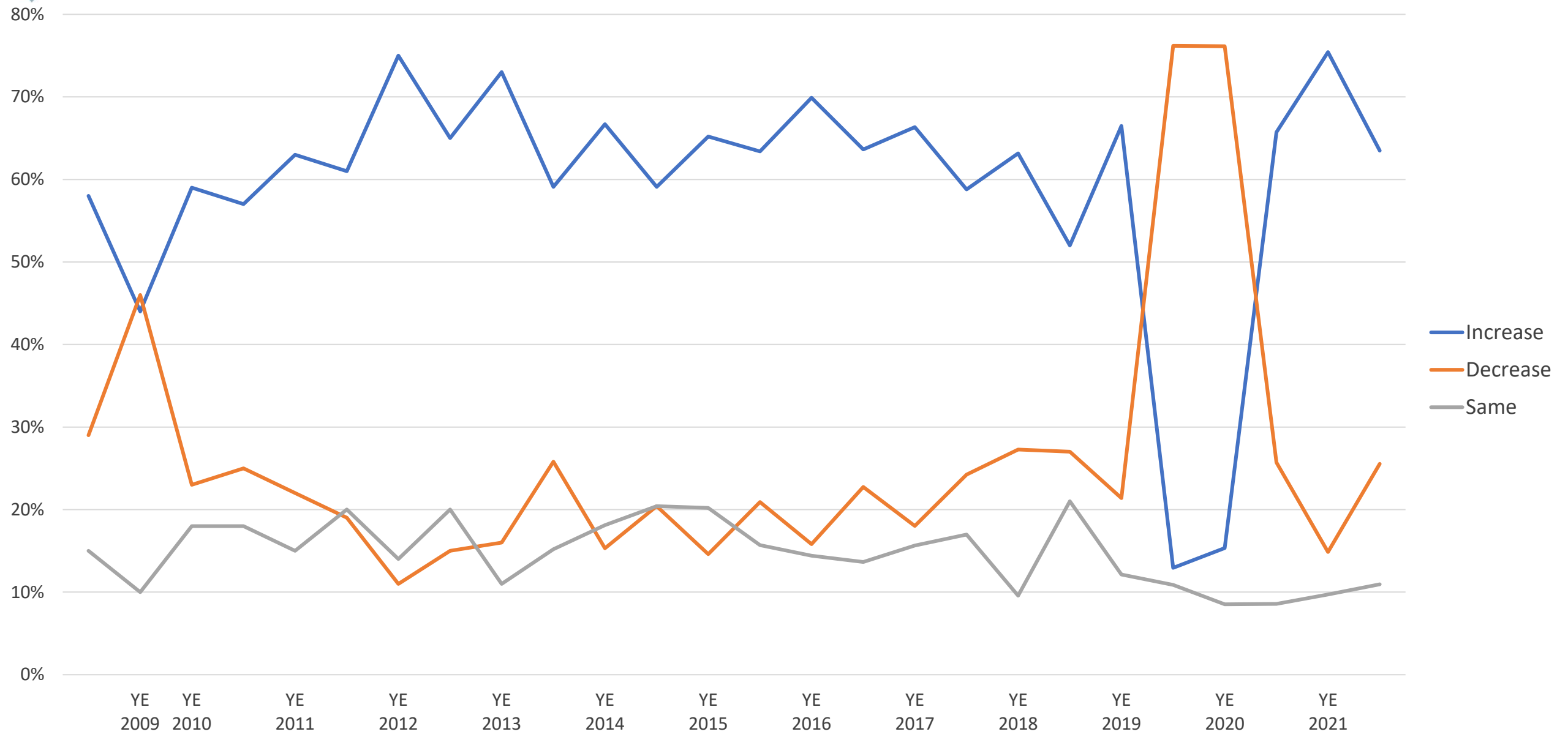
In comparing membership revenues at mid-year 2022 to membership revenues at mid-year 2021, your membership revenues...



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

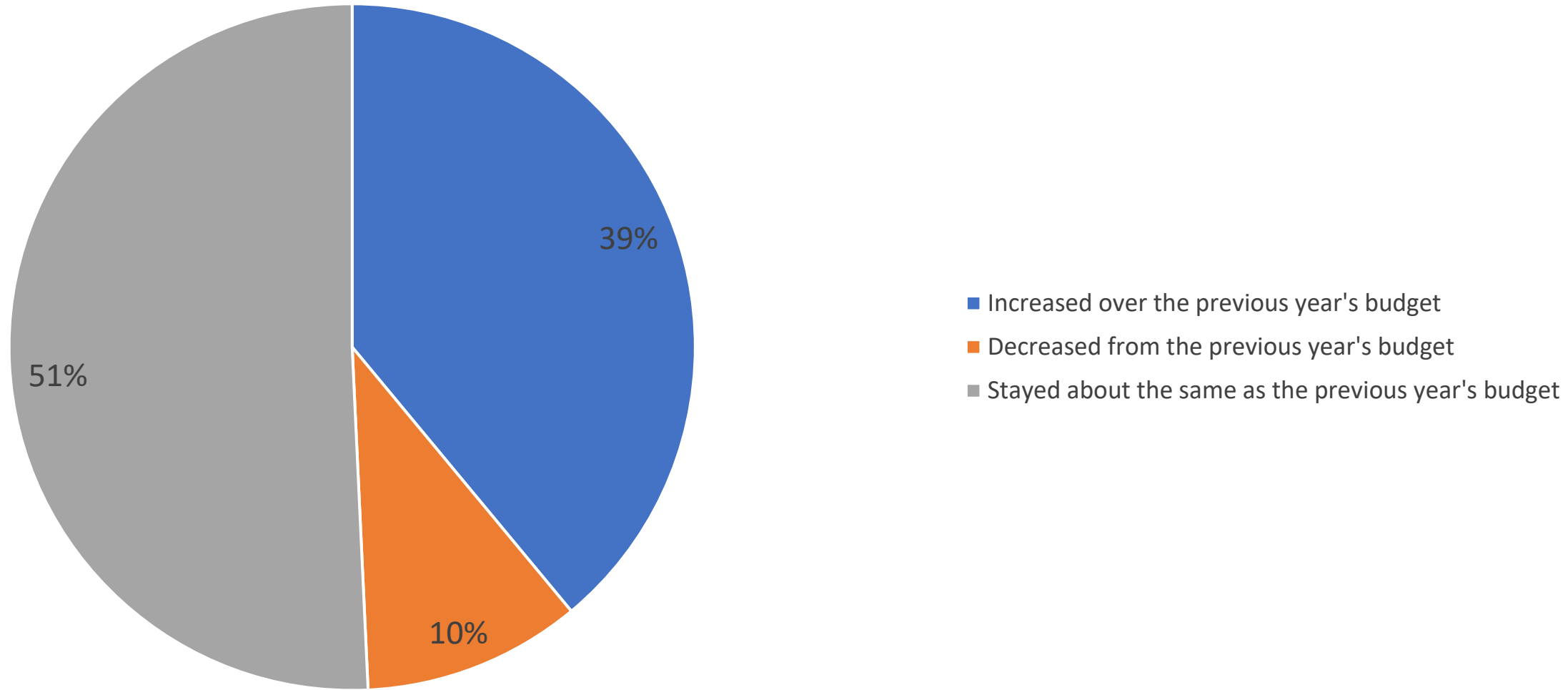


Membership Revenue



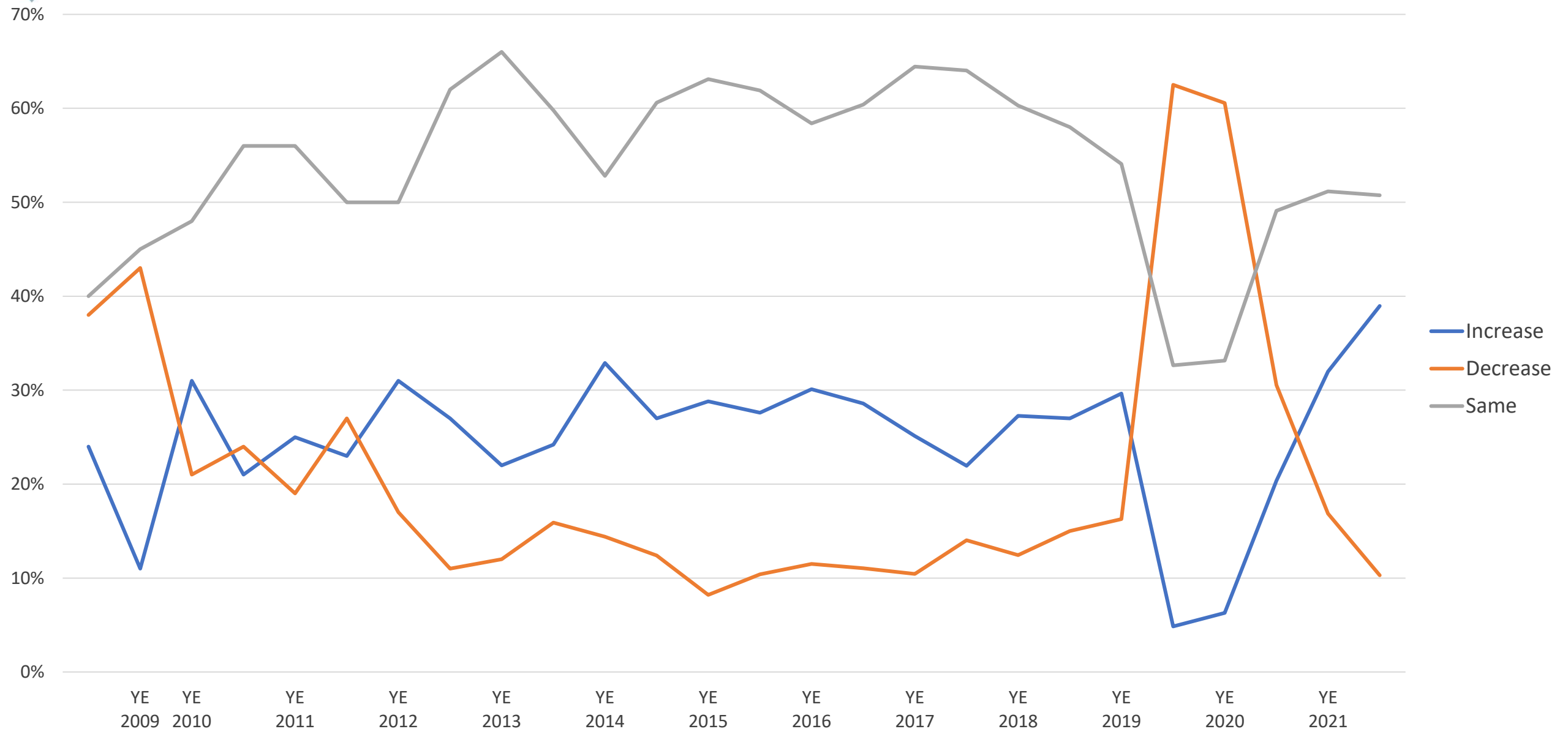


Comparing your membership expenditure budget for mid-year 2022 to your membership expenditure budget from 2021, your membership expenditure budget...





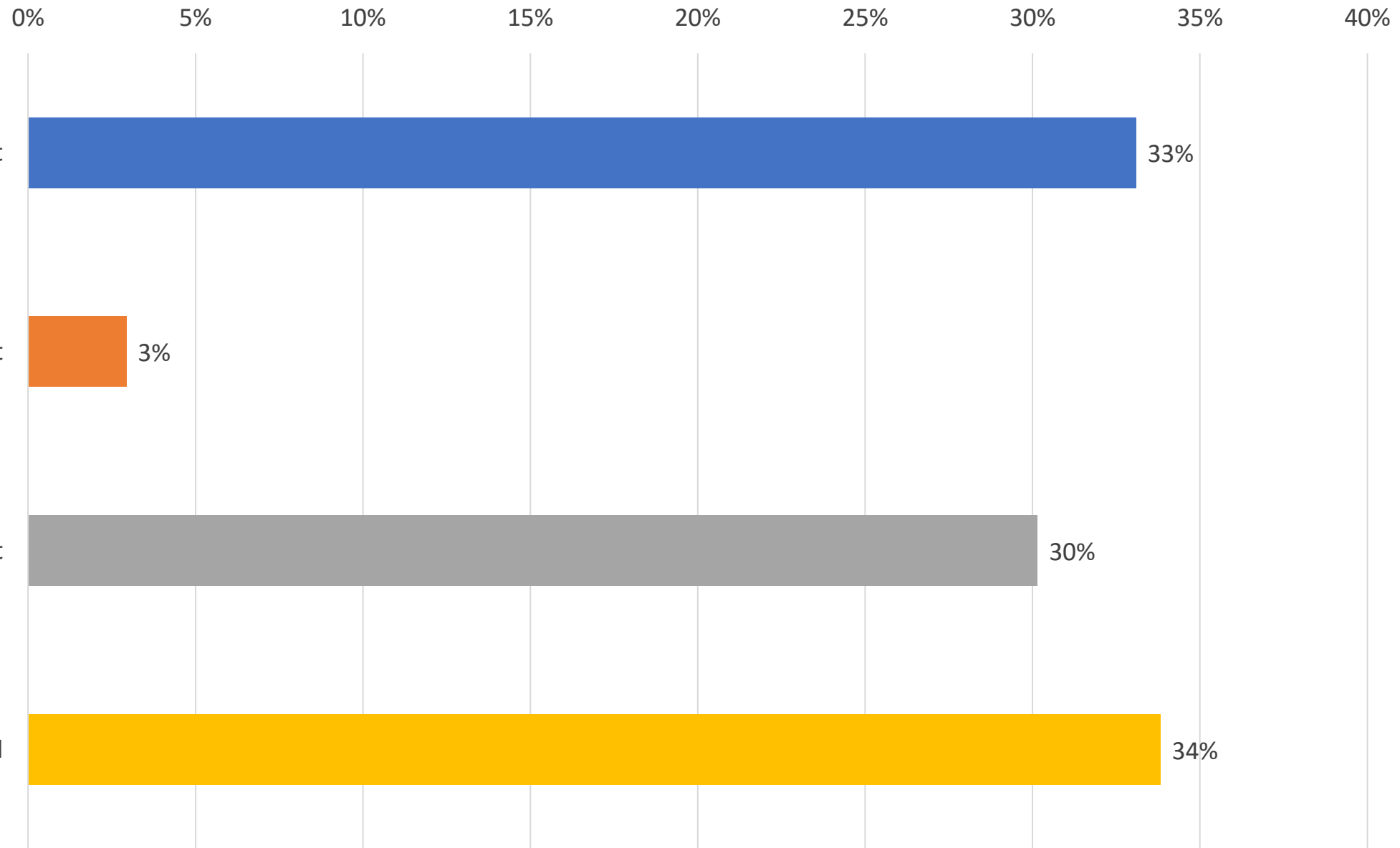
Membership Budget



- Increase
- Decrease
- Same

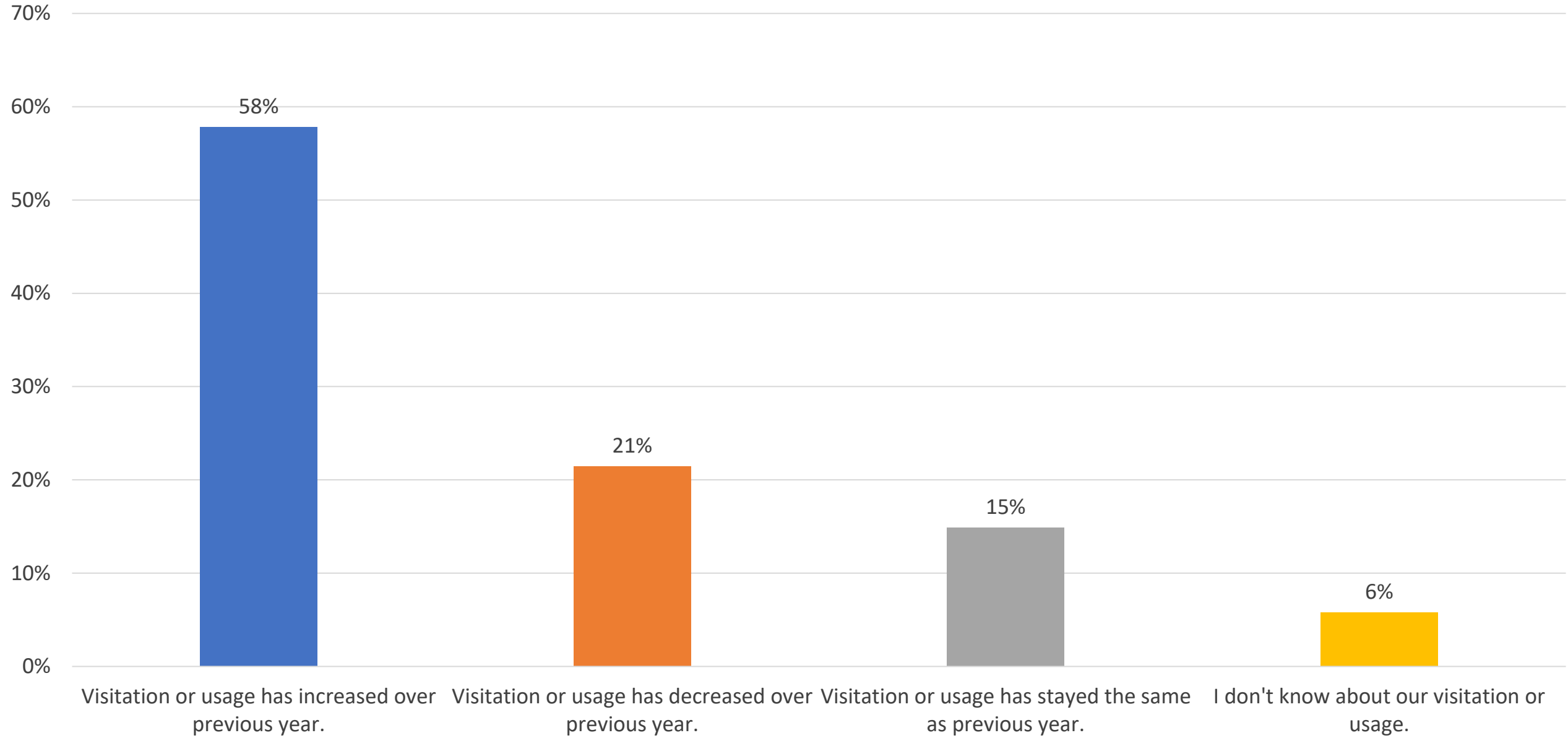


Your 2023 expenditure budget is...



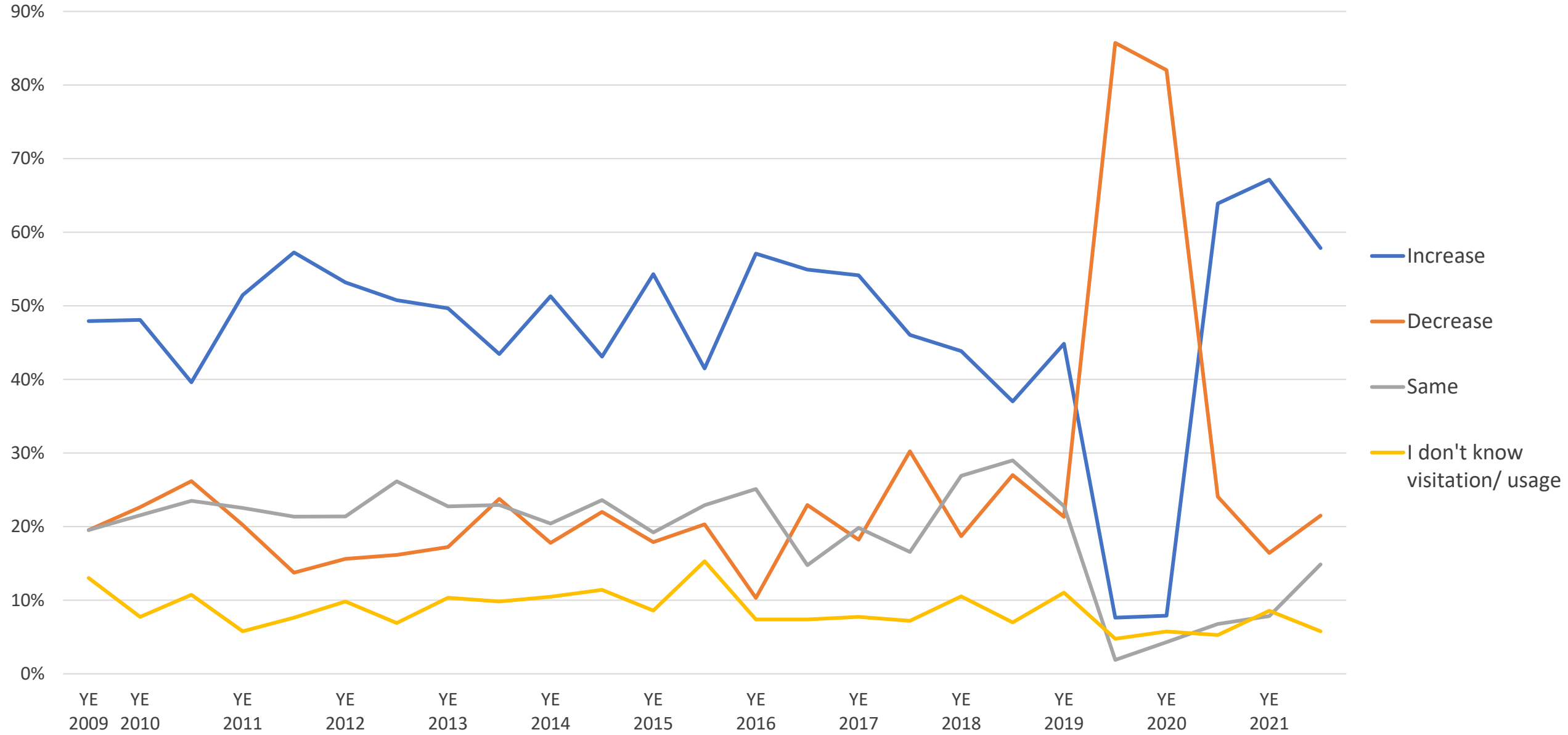


Please describe your organization's visitation or usage patterns in 2022.





Visitation or Usage





Recap

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

Mid-Year 2021

- Membership Totals
 - 72% increase
 - 11% stayed the same
 - 17% decrease
- Revenues
 - 75% increase
 - 10% stayed the same
 - 15% decrease
- Expenditure Budgets
 - 32% increase
 - 51% stayed the same
 - 17% decrease
- Visitation/Usage
 - 67% increase
 - 8% stayed the same
 - 16% decrease

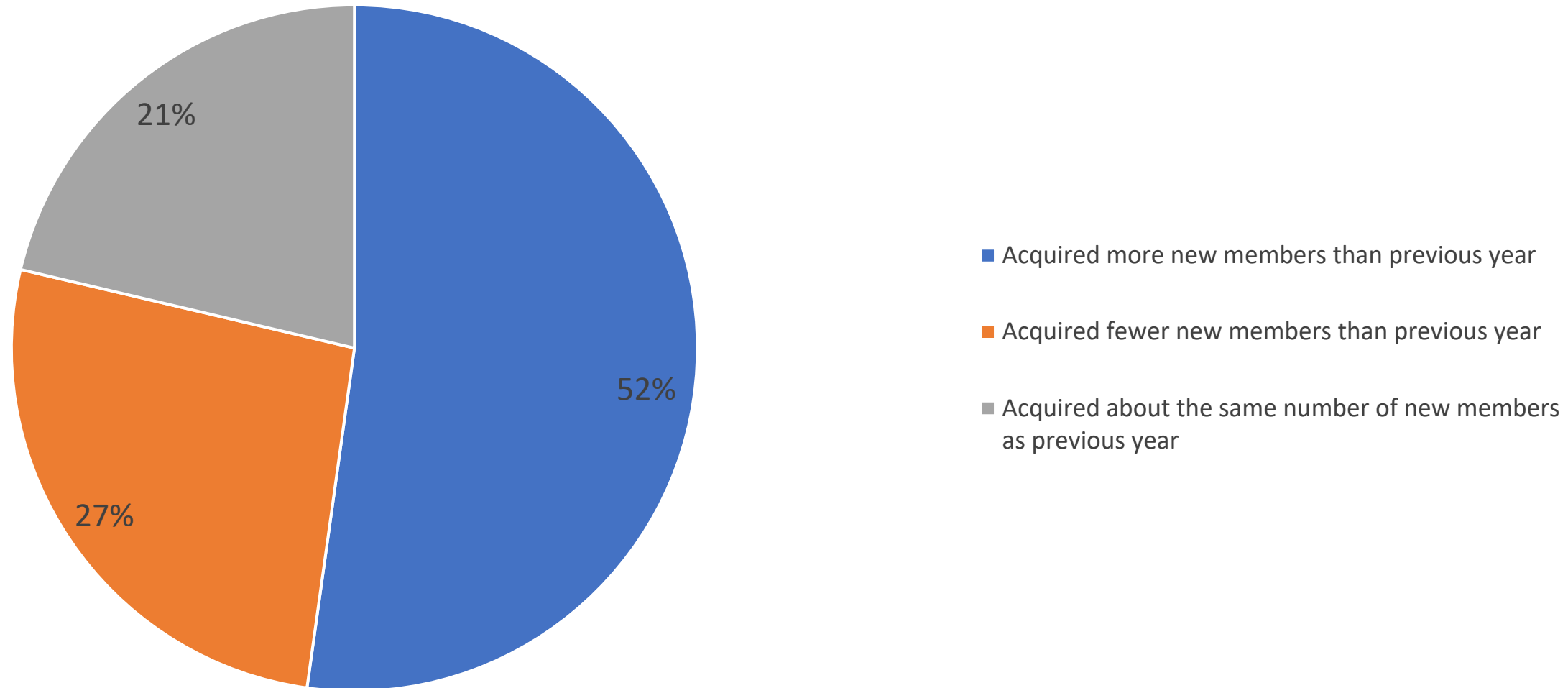


Trends – Acquisition

Pulse 2022 Mid-Year Data

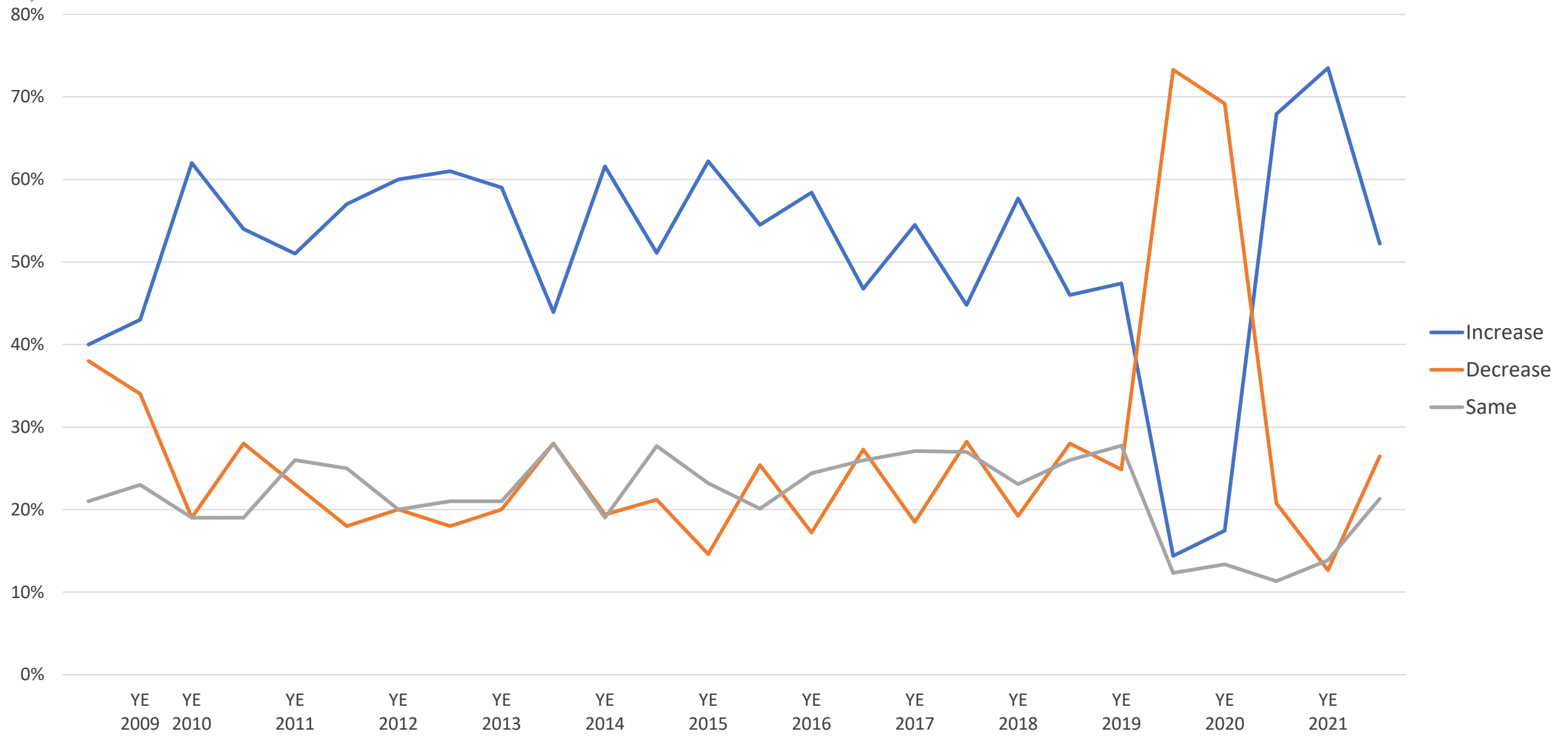


Comparing new members acquired in 2022 year-to-date to new members acquired in 2021 year-to-date, your membership acquisition efforts have...



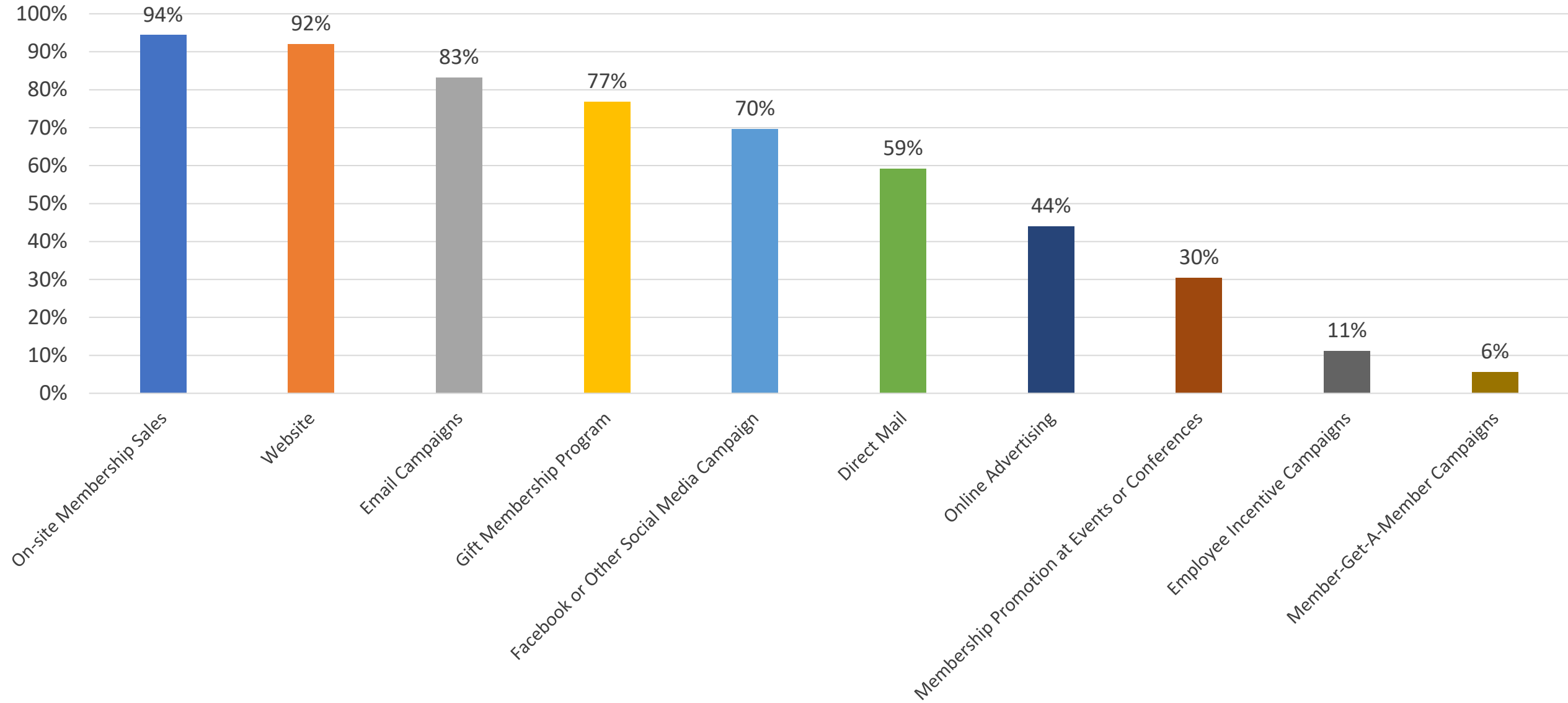


New Members Acquired



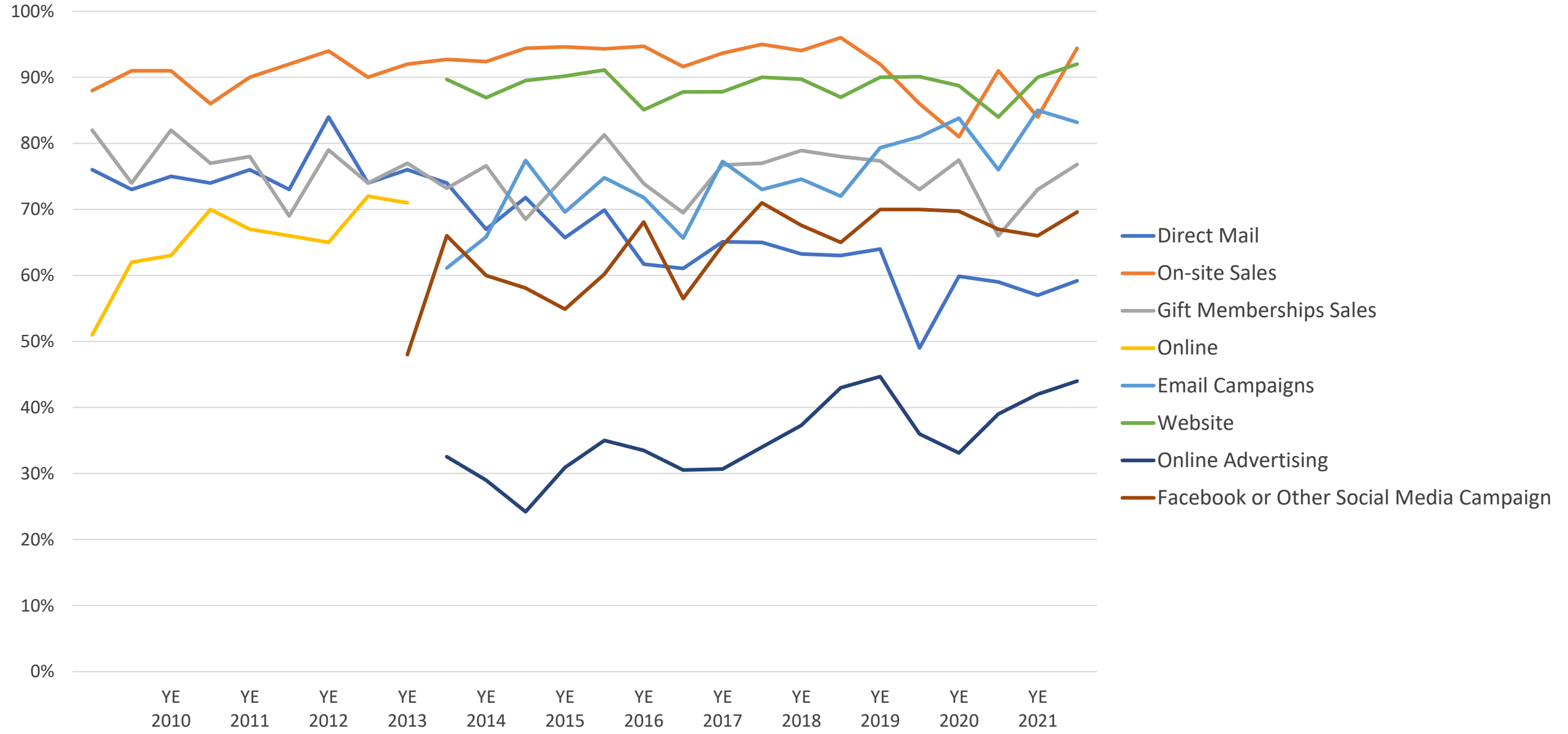


Membership Acquisition: Please select all of the means of acquiring new members that your program utilizes.



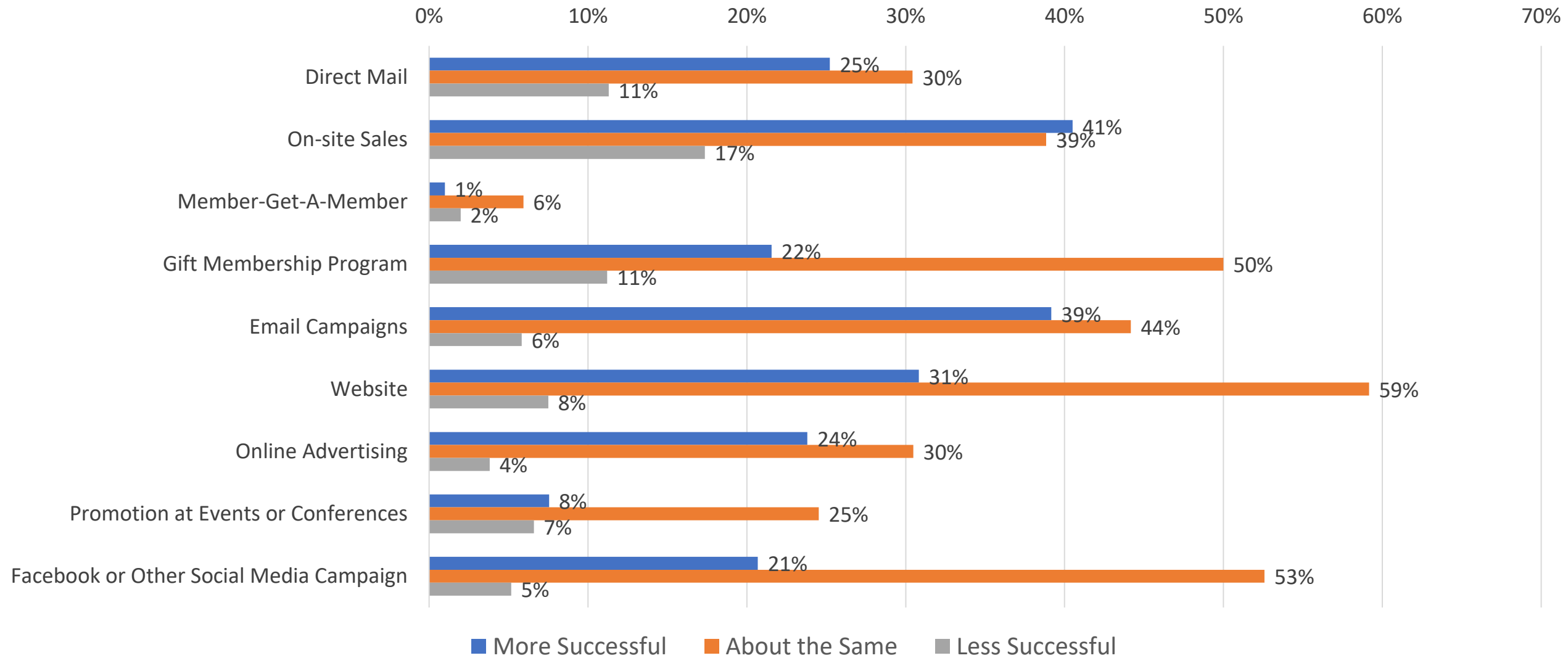


Acquisition Sources Used





Please rate each source of member acquisition that you used in 2022 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.





Recap – Acquisition Methods

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

Mid-Year 2021

- New Members
 - 68% increase
 - 21% said decrease
 - 11% staying the same
- Top 5 Acquisition Methods
 1. Website
 2. Email Campaigns
 3. On-site Membership Sales
 4. Gift Membership Program
 5. Facebook or Other Social Media Campaign

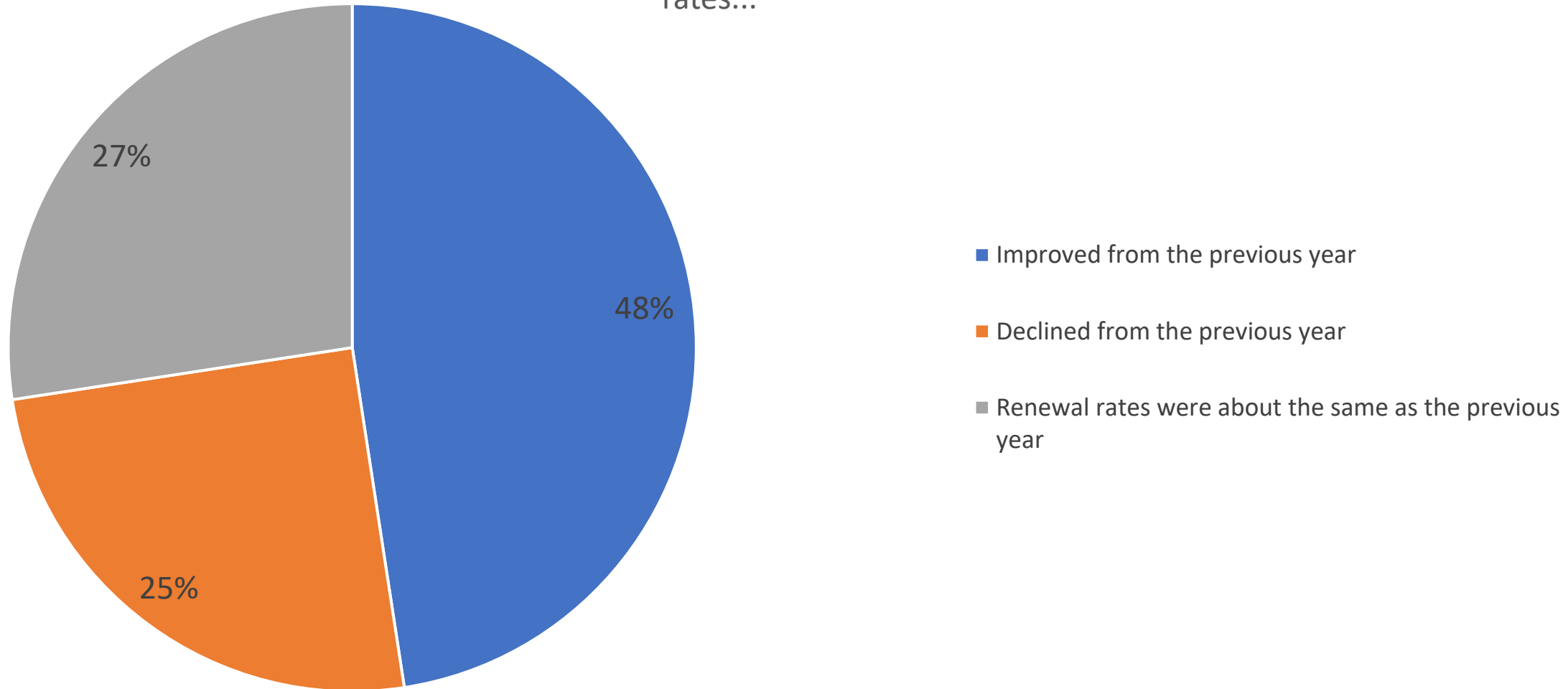


Trends – Renewals

Pulse 2022 Mid-Year Data

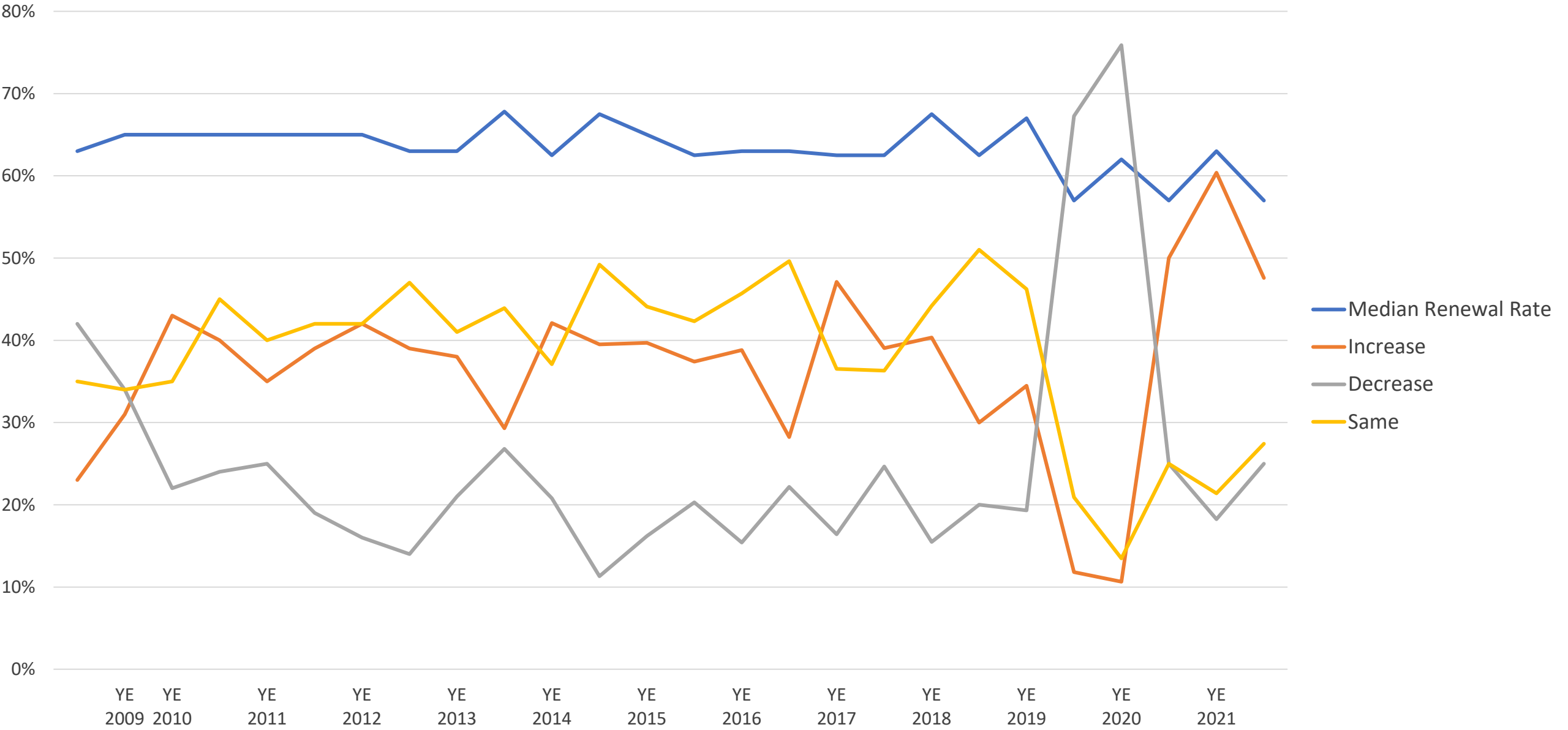


Comparing membership renewal rates in 2022 compared to those in 2021, would you say that renewal rates...





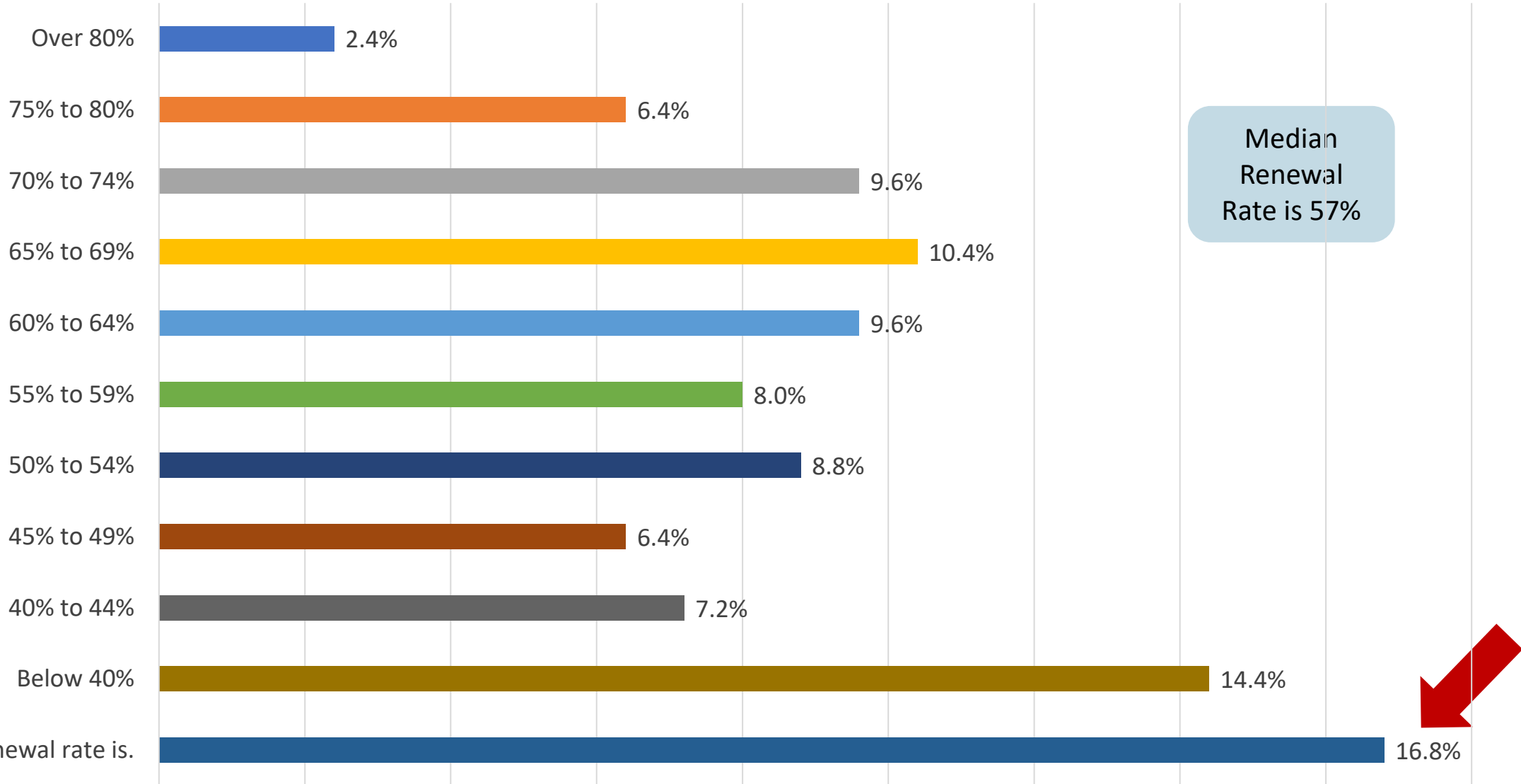
Renewal Rates





What is your membership renewal rate?

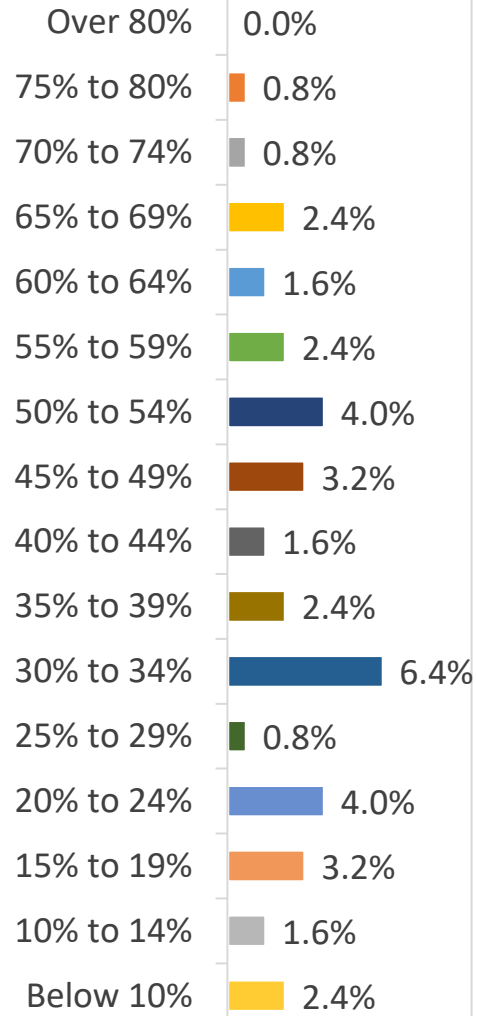
0.0% 2.0% 4.0% 6.0% 8.0% 10.0% 12.0% 14.0% 16.0% 18.0%





What is your first-year member renewal rate?

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



Median First-Year Renewal Rate is 37%



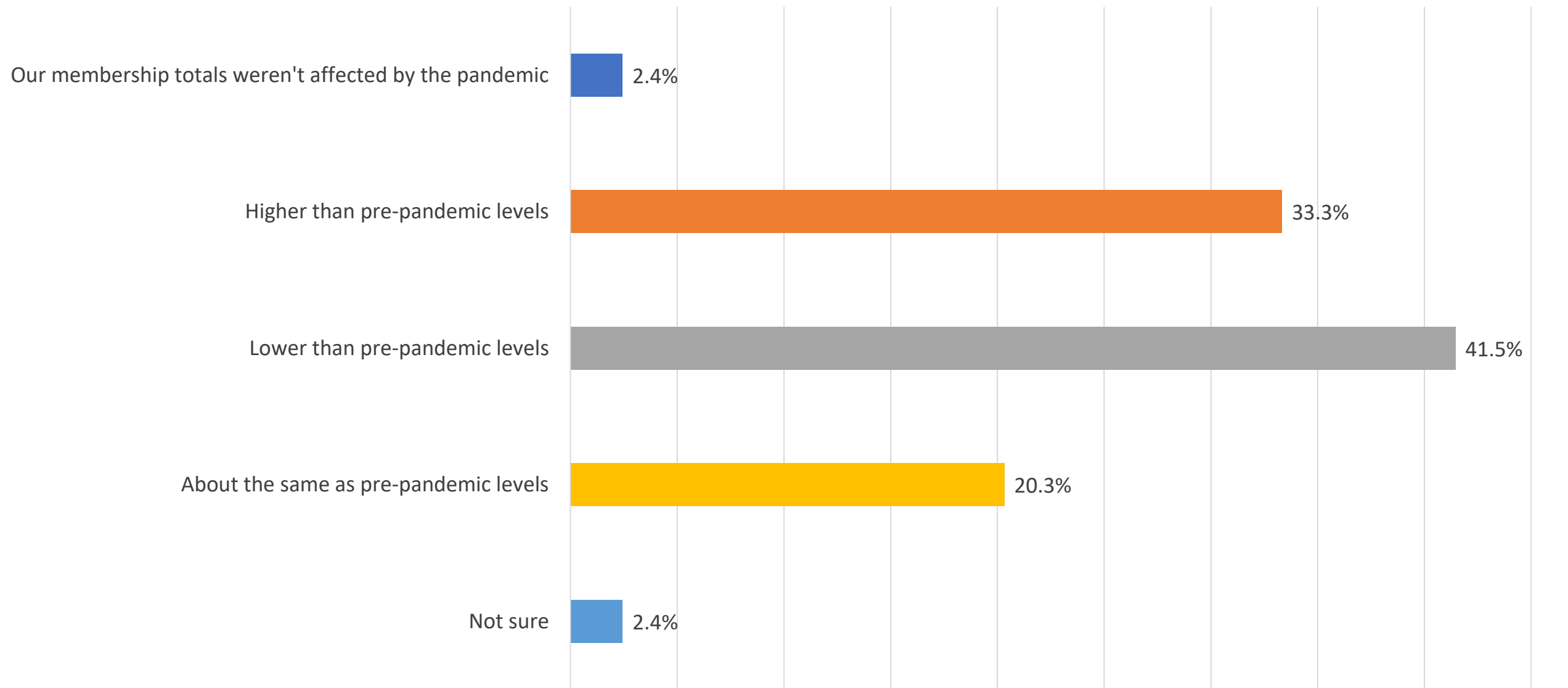
I don't know what the first-year renewal rate is.

62.4%



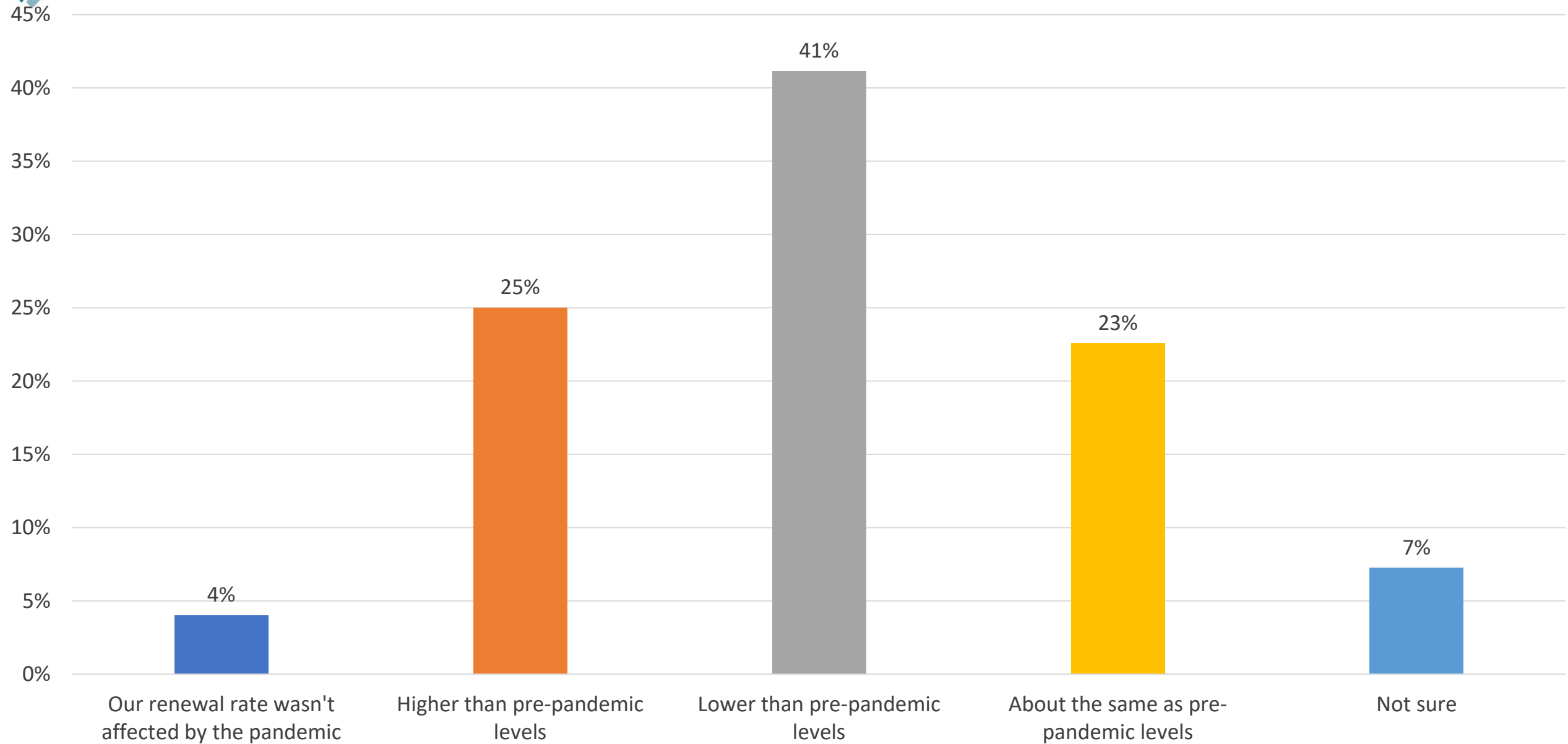
How has the pandemic affected your membership totals?

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





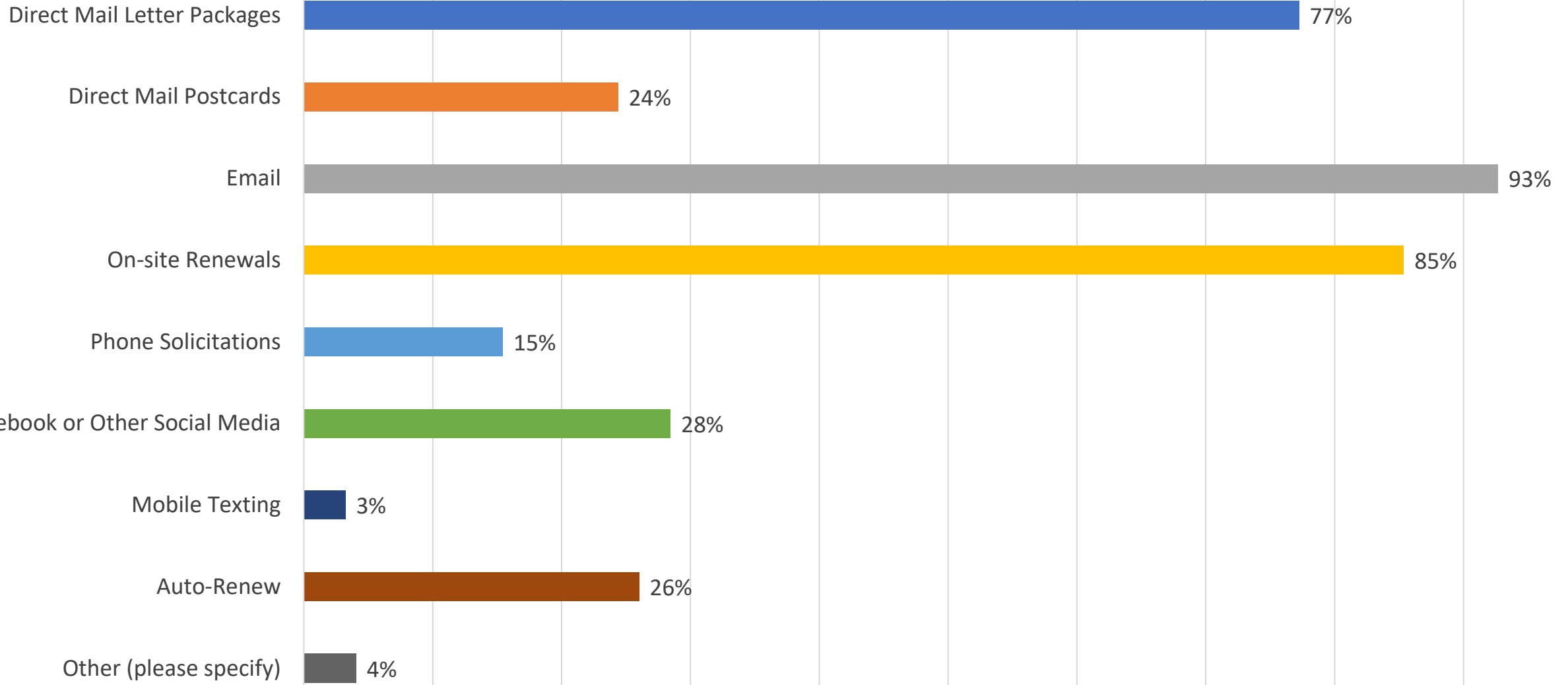
How has the pandemic affected your renewal rate?





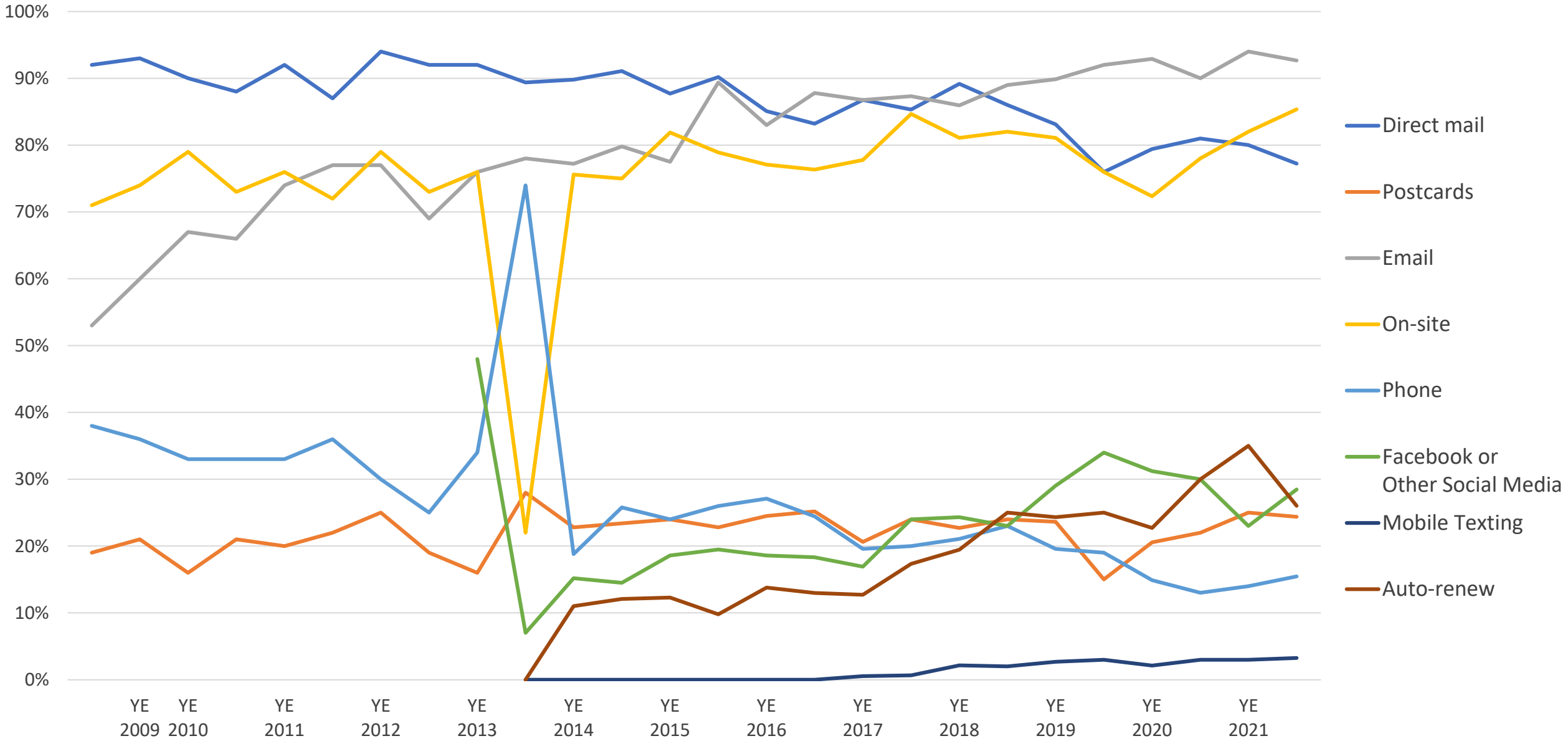
Please indicate the methods your program utilizes to drive membership renewals.

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



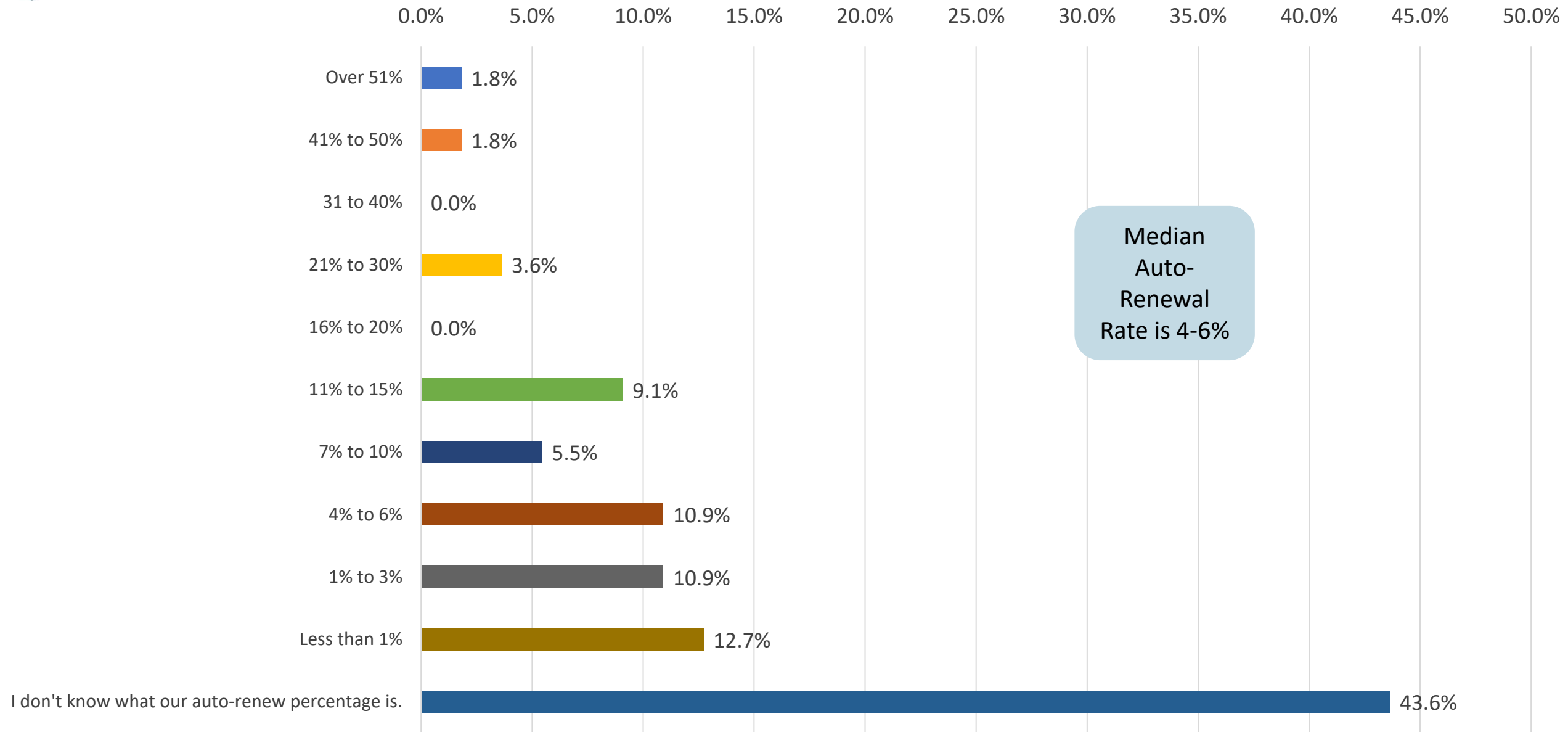


Methods Utilized to Drive Membership Renewals





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





Recap – Renewals

Mid-Year 2022

- Renewal Rates
 - 48% increase
 - 25% decrease
 - 27% staying the same
- Median Renewal Rate = 57%
 - 16.8% 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 has 26% utilizing now

Mid-Year 2021

- 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

And **Auto-Renewal** is on the rise with 35% utilizing now

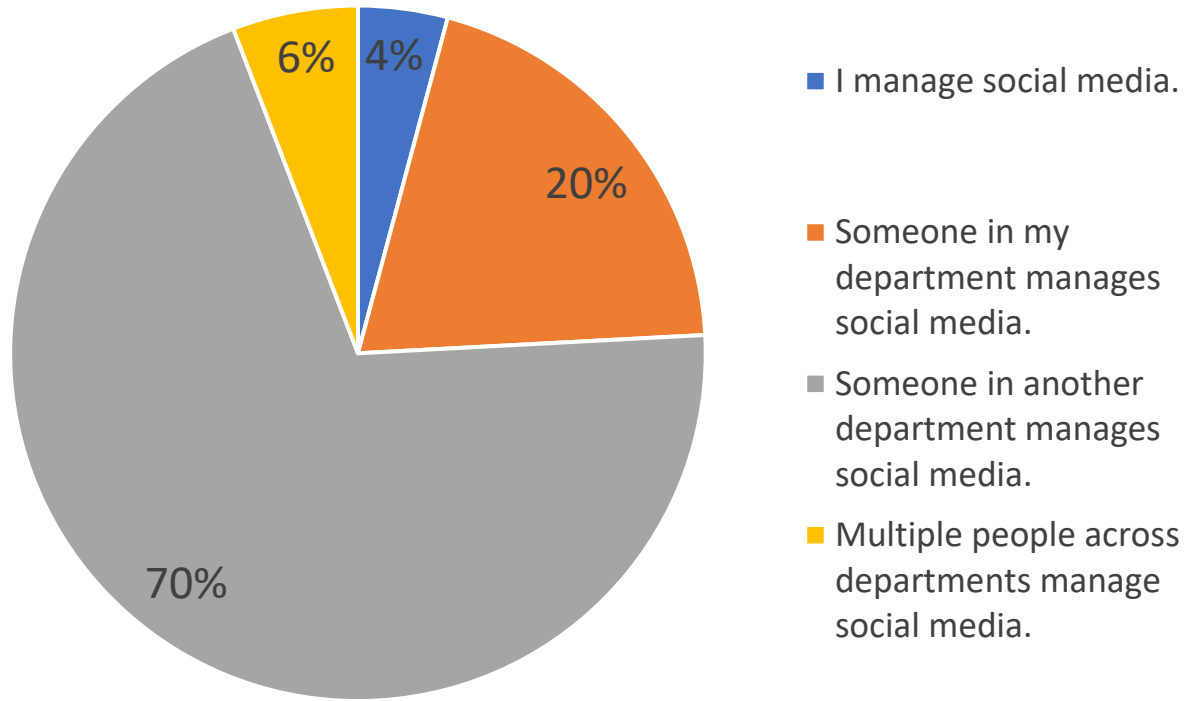


Digital, Online, Social Media and Mobile Marketing

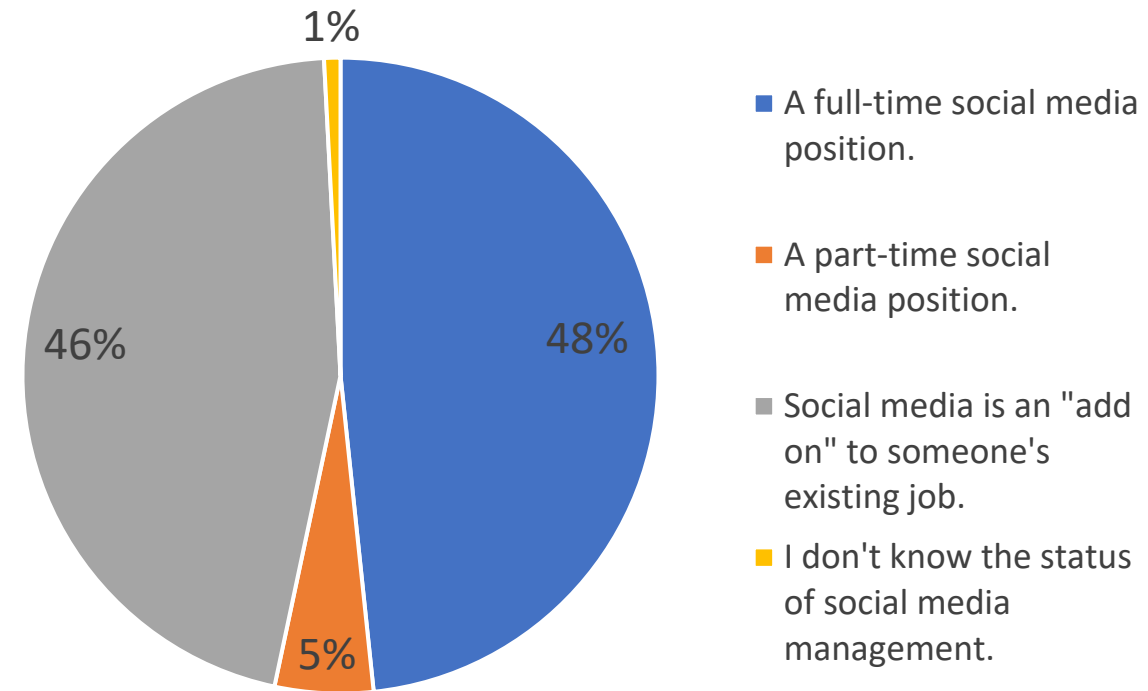
Pulse 2022 Mid-Year Data



Who manages social media at your organization?

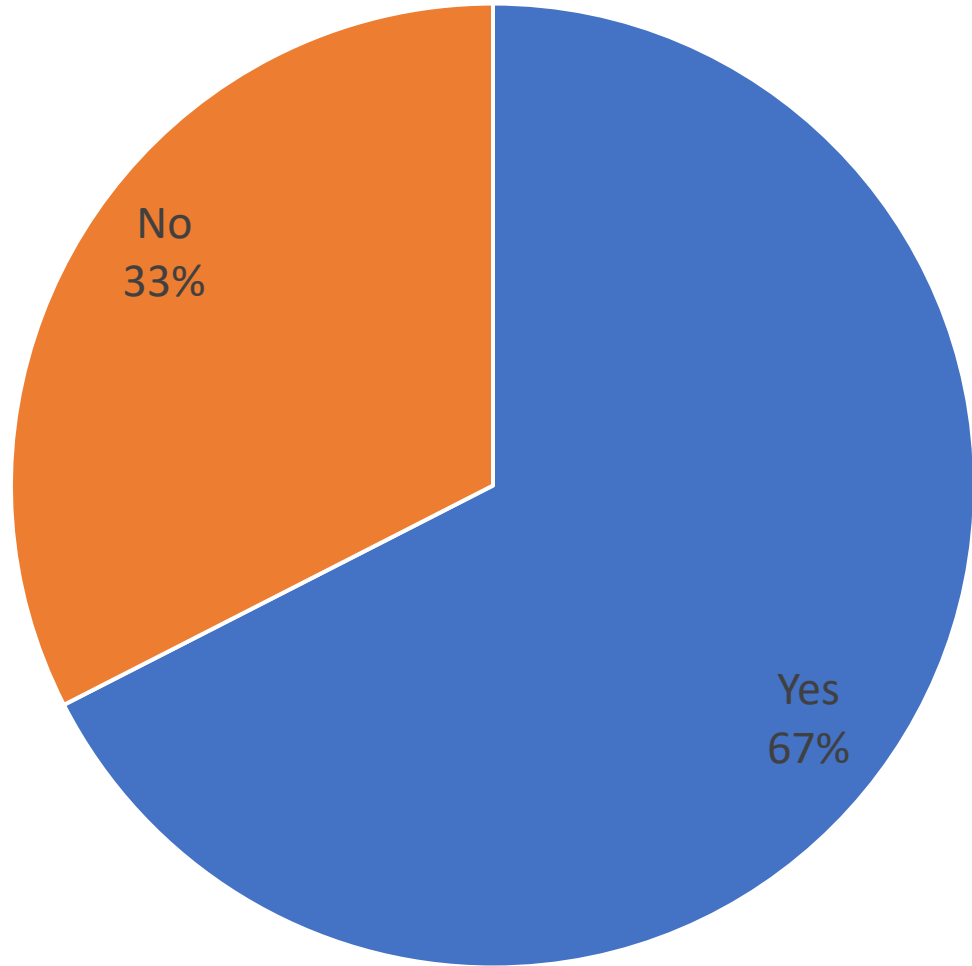


The person at my organization who manages social media is ...

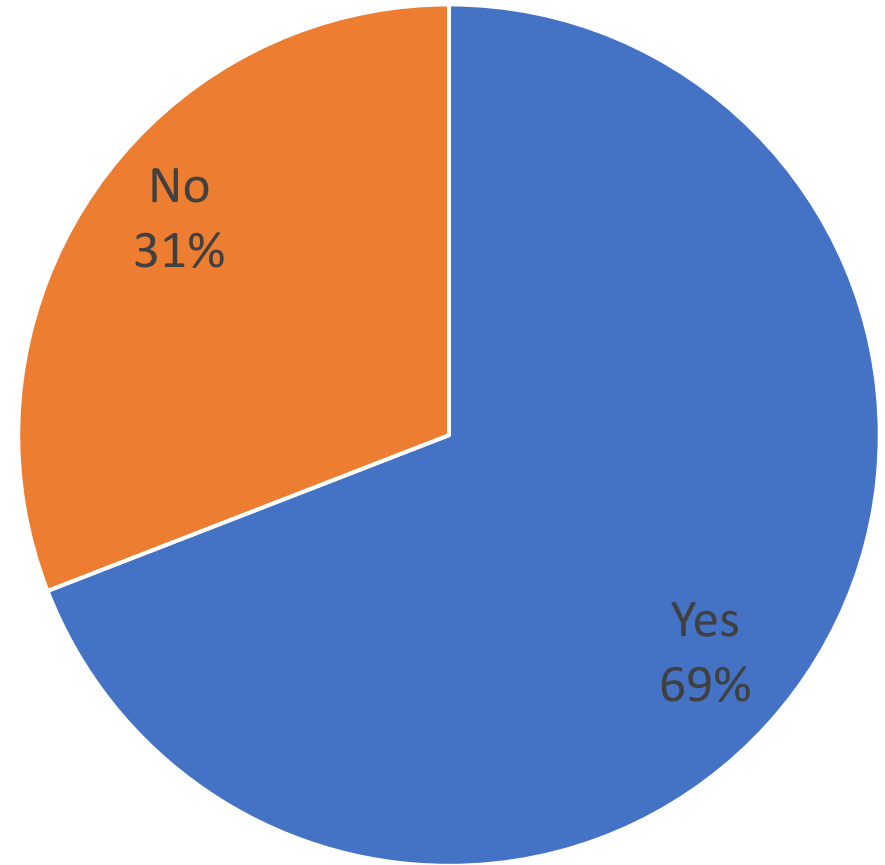




Does Membership have a voice in your organization's social media strategy?

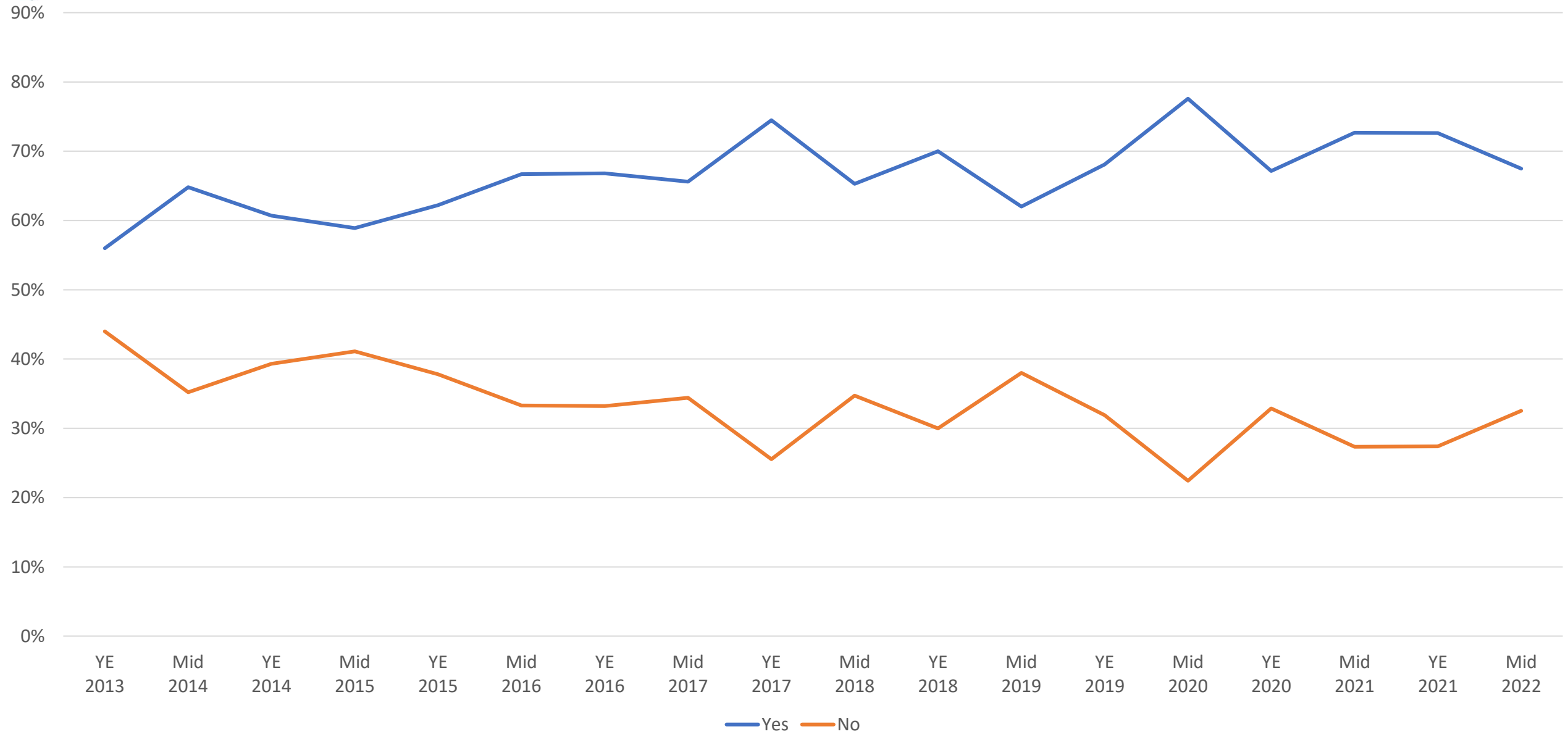


Does Membership have a voice in your organization's social media content management (e.g., membership messages, promotions, contests)?





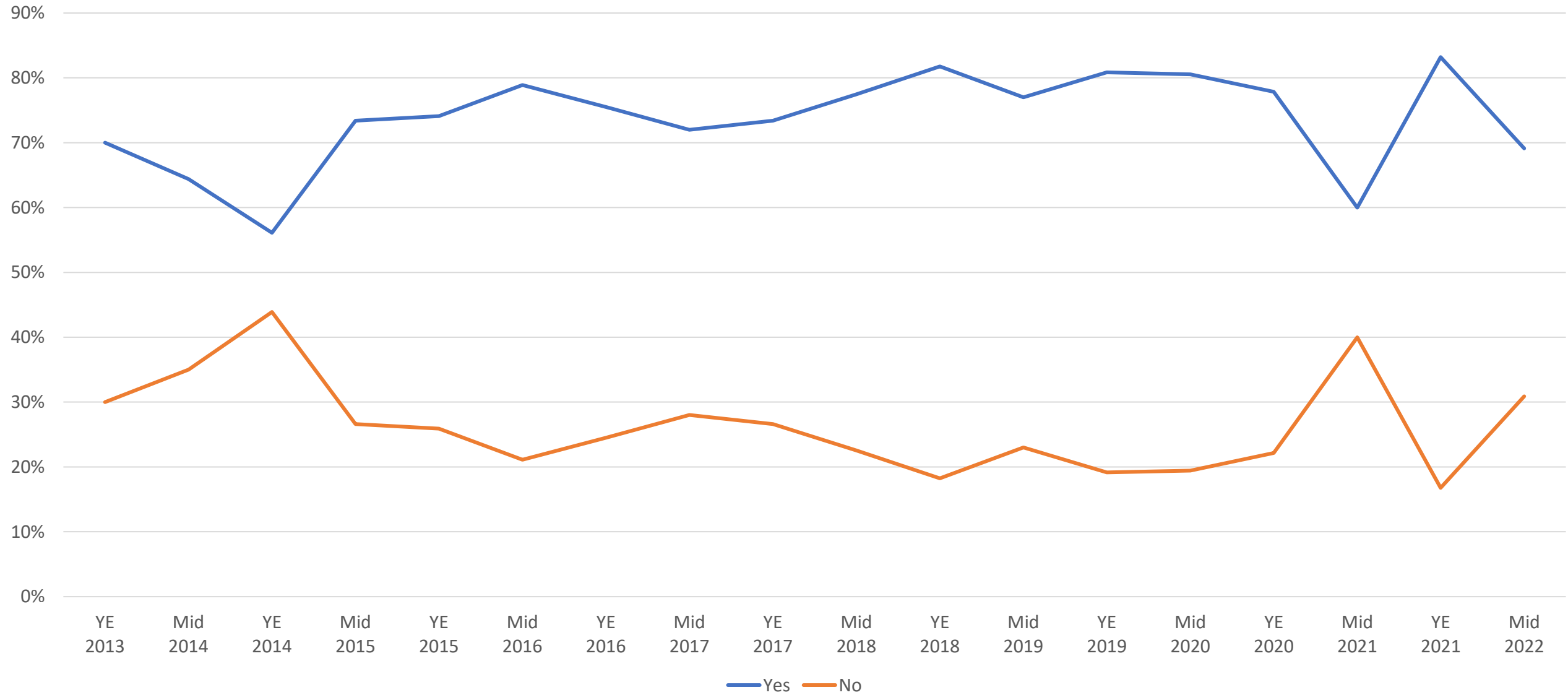
Does Membership have a voice in your organization's social media strategy?



— Yes — No

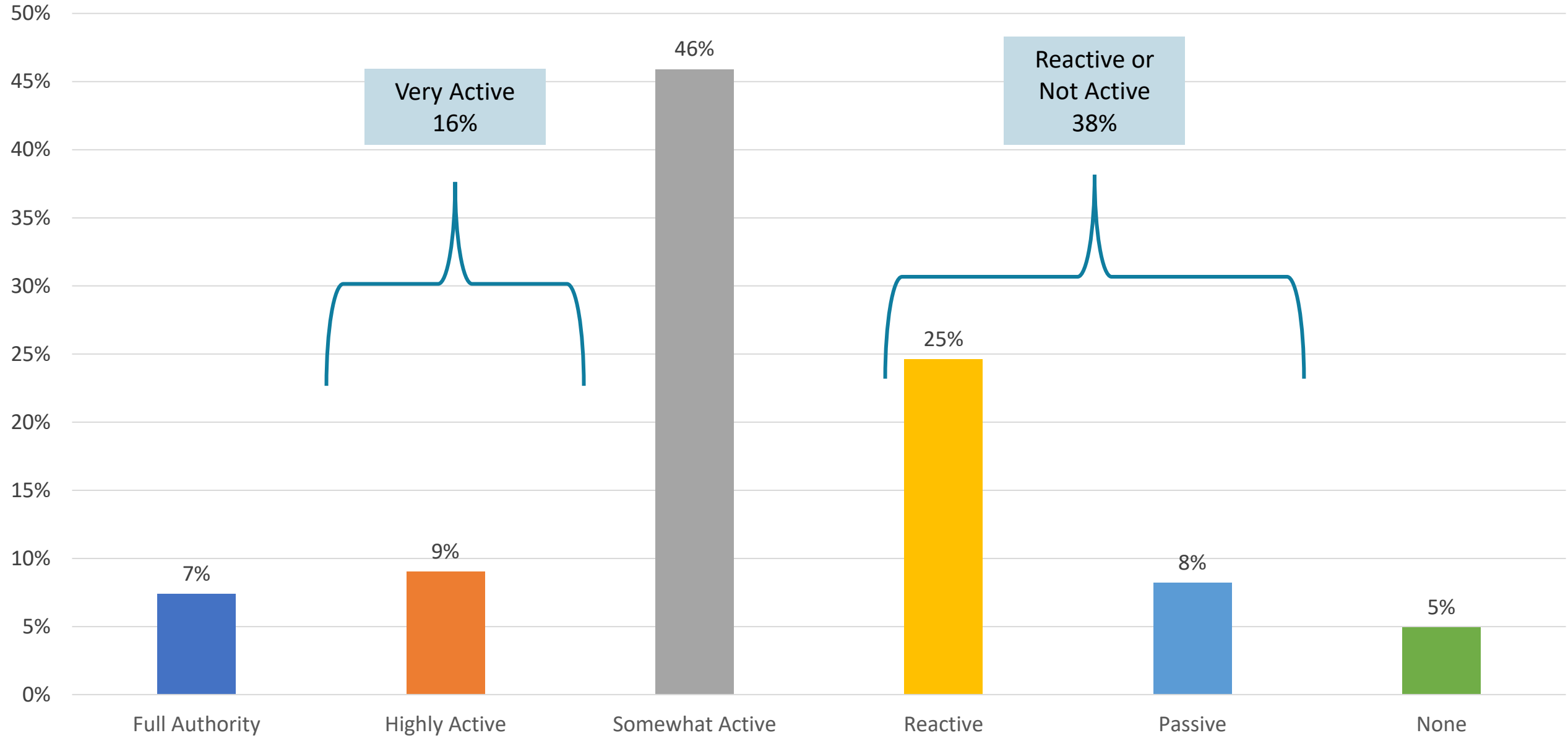


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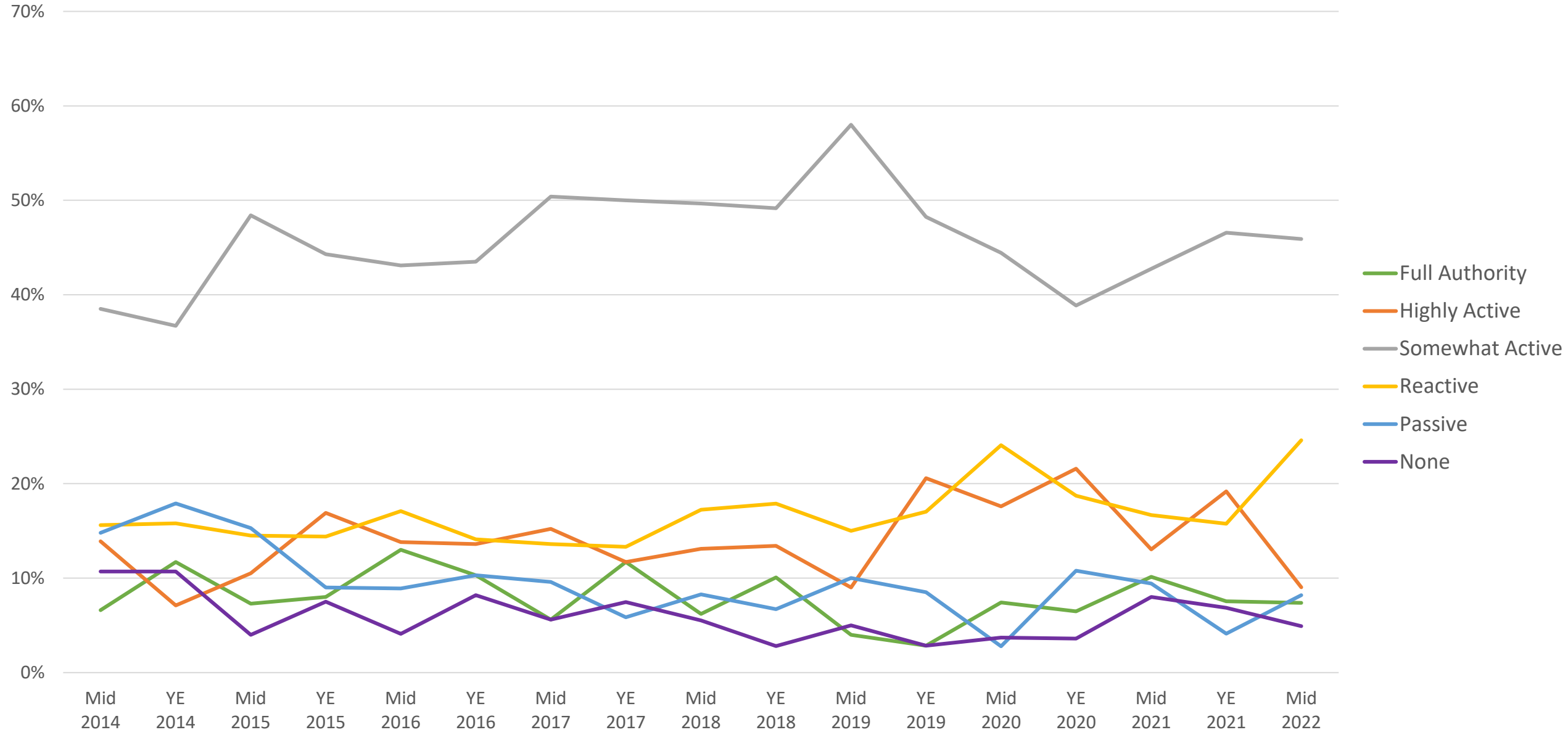


What type of role does membership have in social media content management?



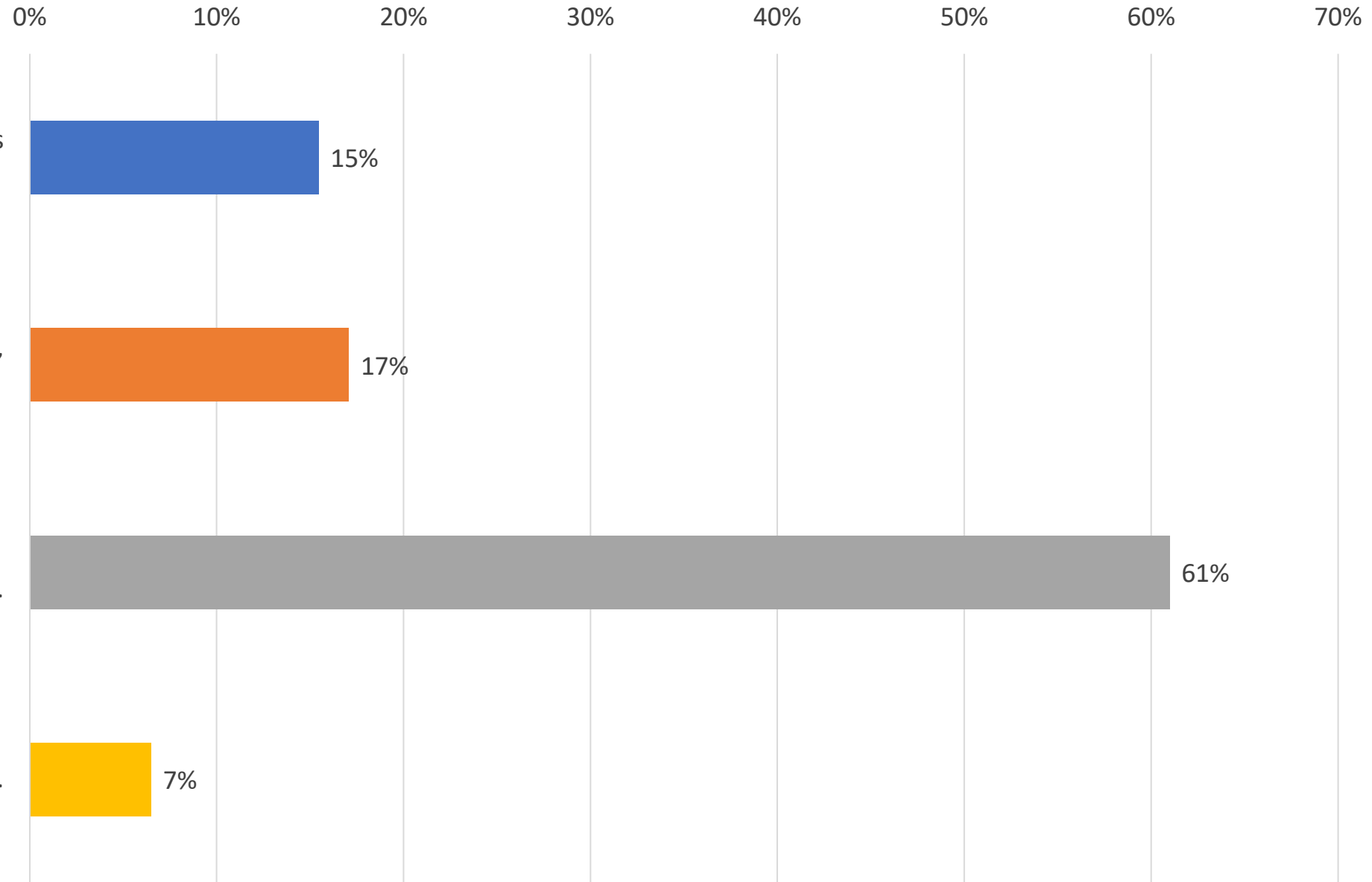


What type of role does membership have in social media content management?





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



Yes, Membership has access to these reports and reviews them regularly.

15%

Yes, Membership has access to these reports, but doesn't review them.

17%

No, Membership does not have access to these reports.

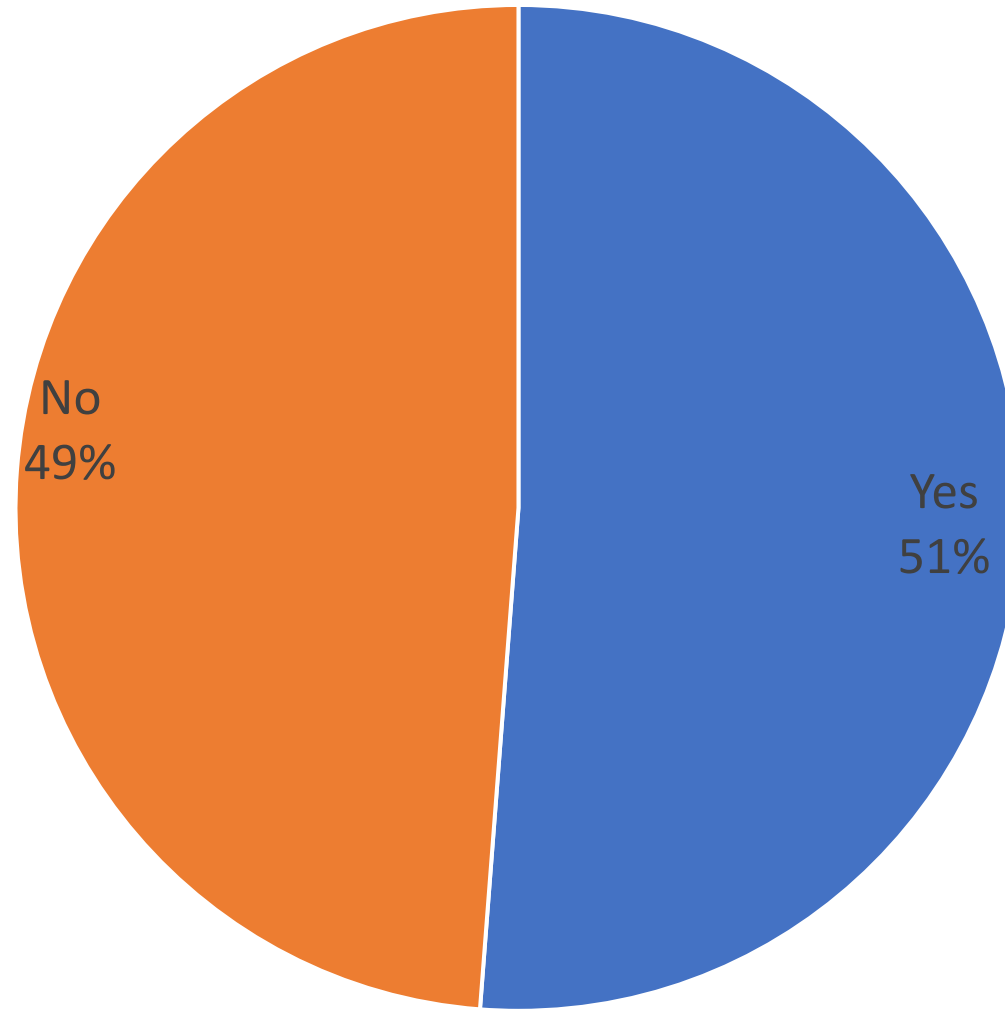
61%

I don't know.

7%

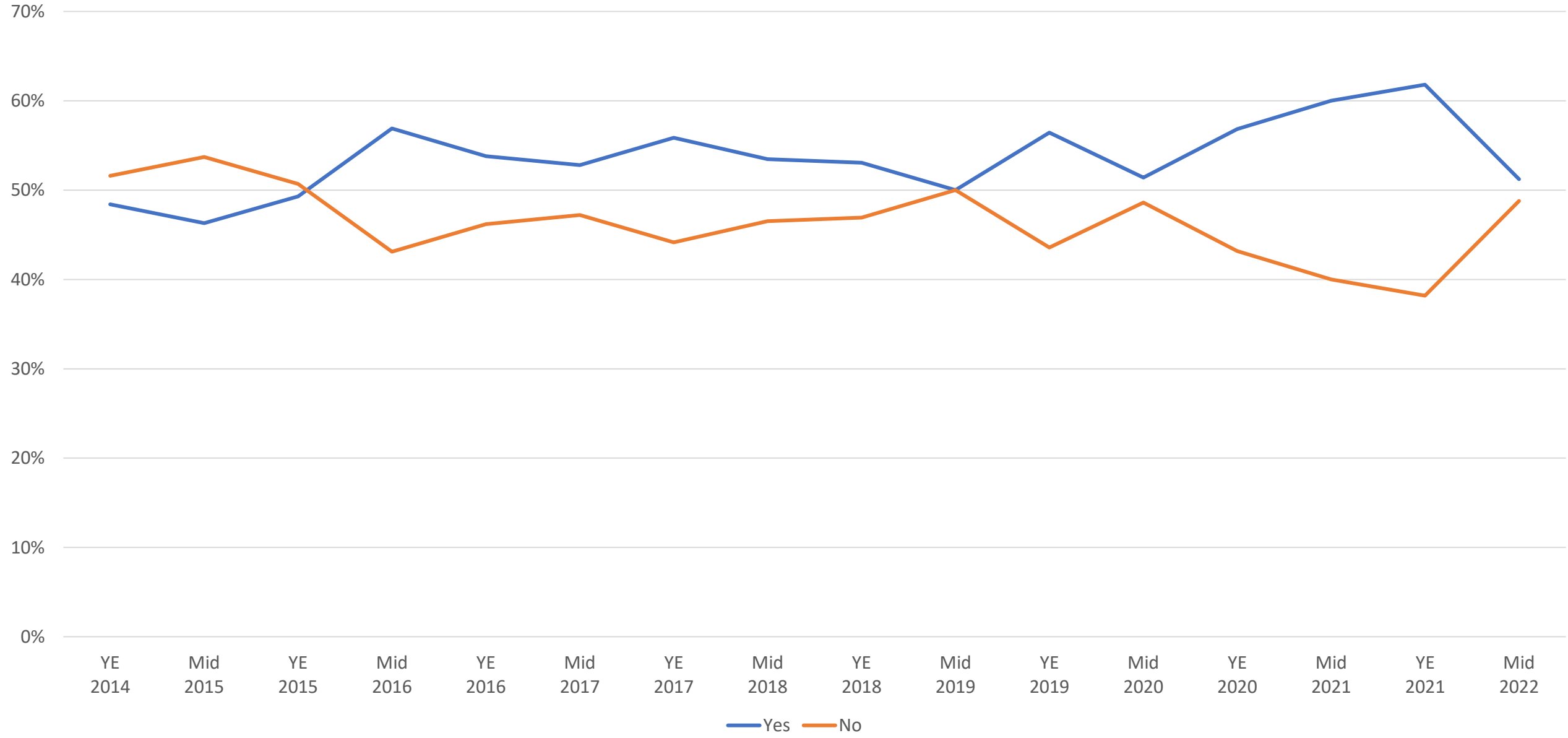


I am satisfied with the voice/role Membership has in our organization's social media strategy.





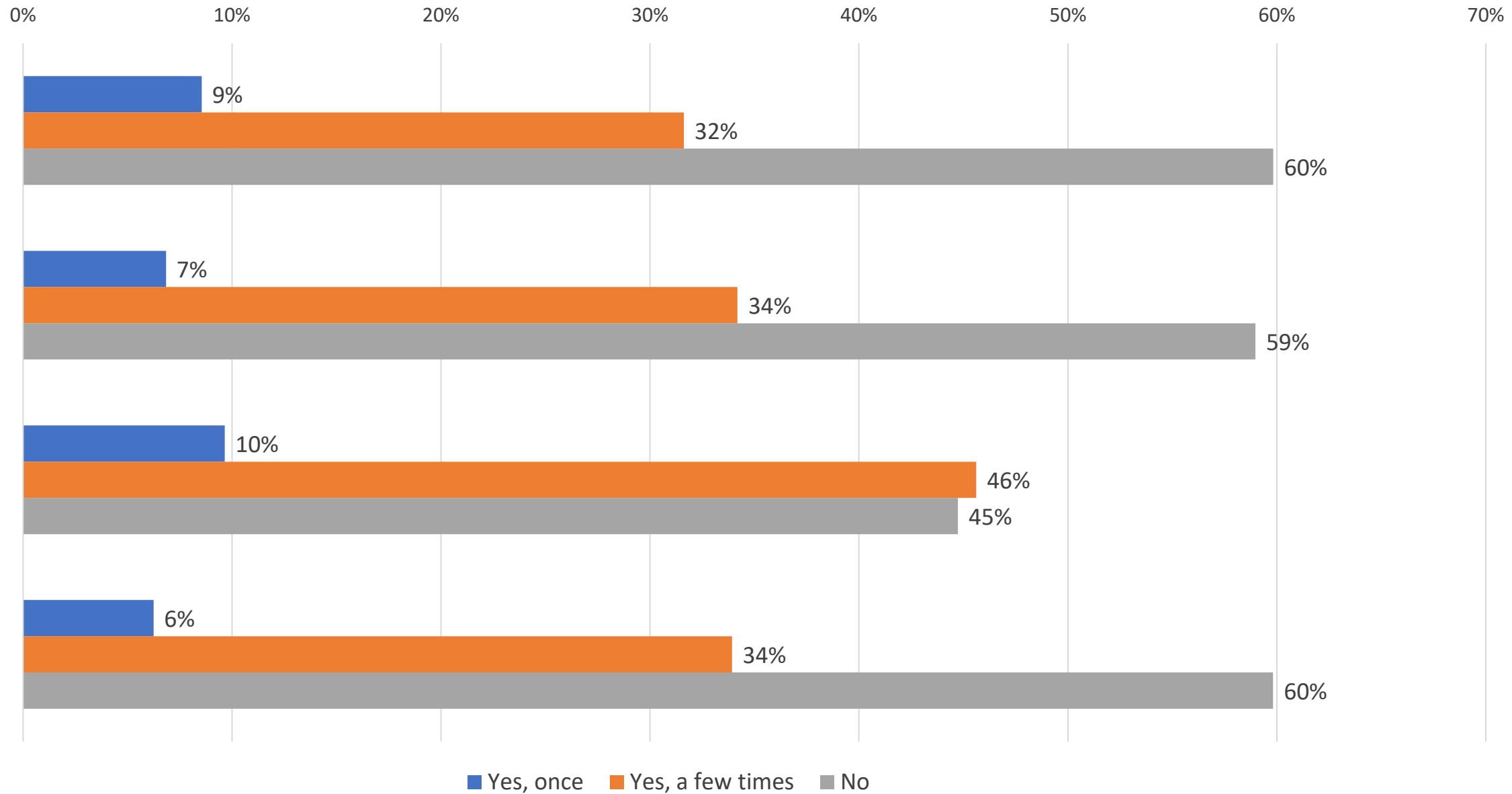
I am satisfied with the voice/role Membership has in our organization's social media strategy.



— Yes — No

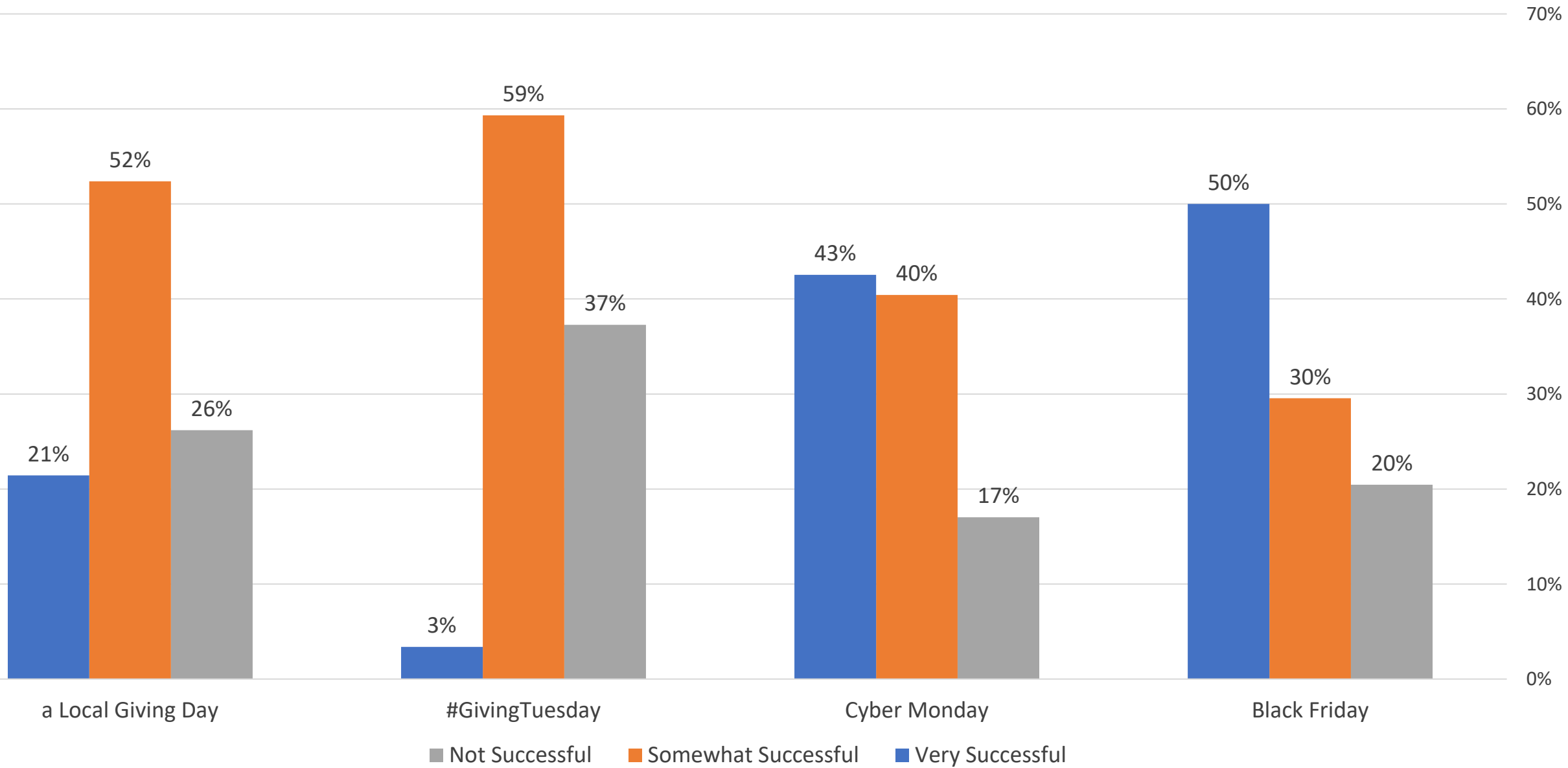


Has your organization participated in any of the following promotions for membership?



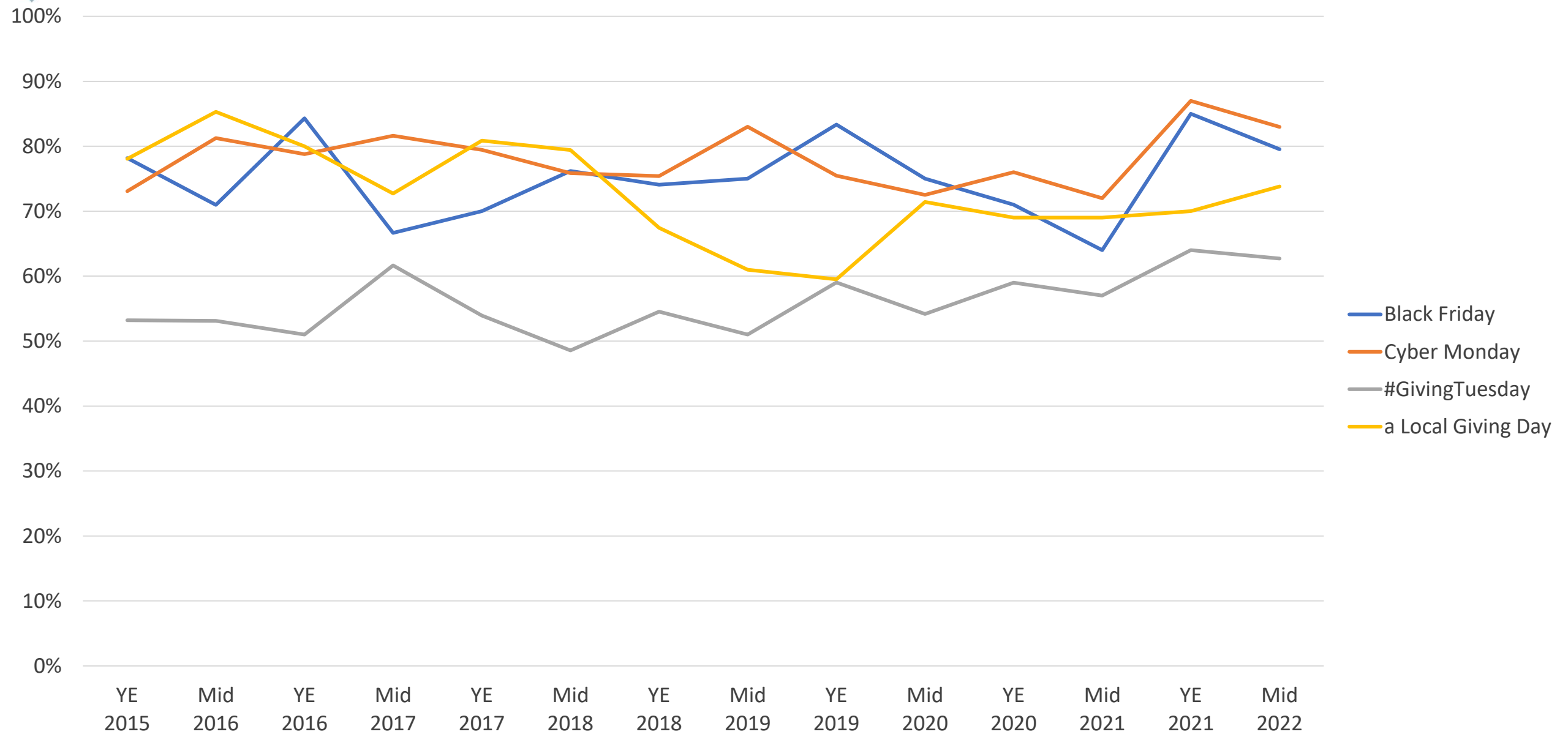


Was the campaign(s) successful?



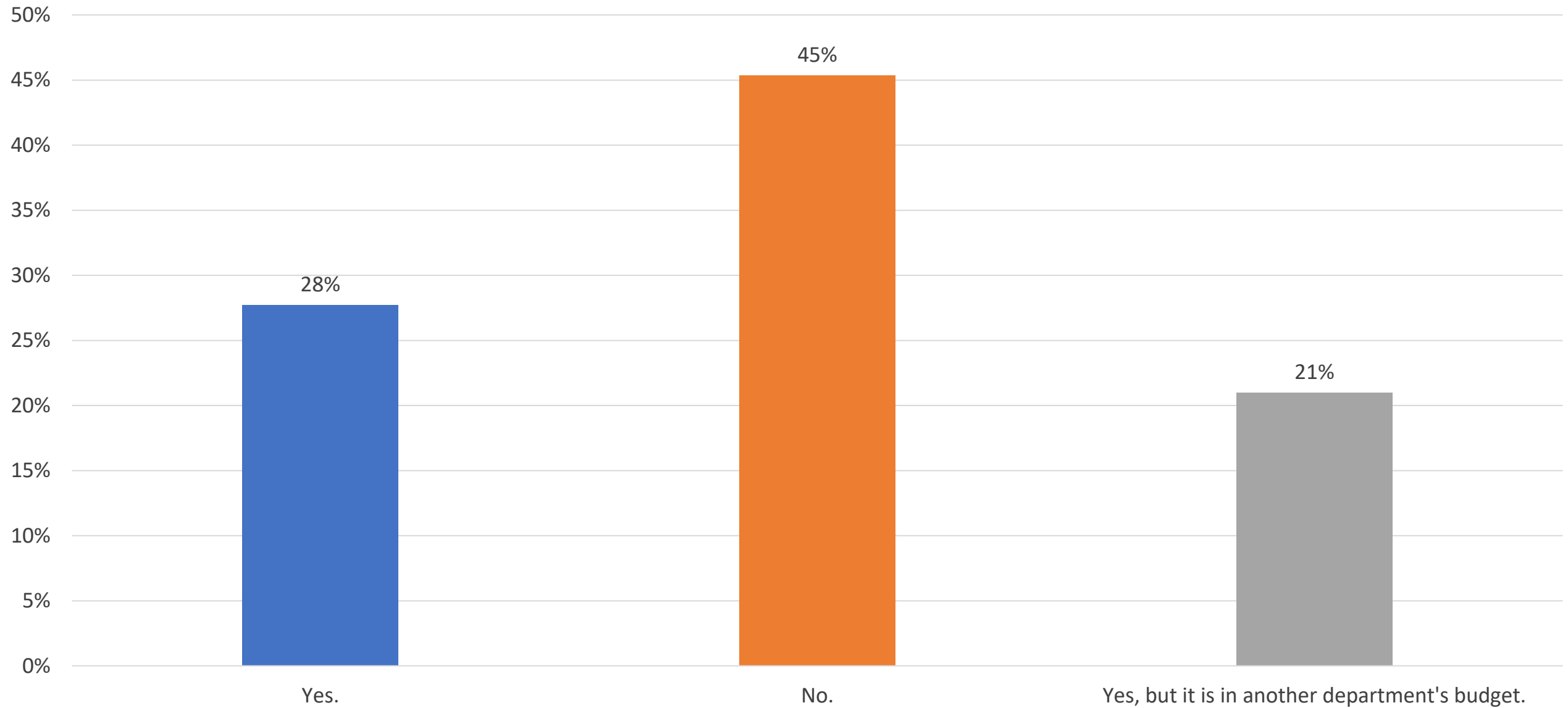


Giving Day Very or Somewhat Successful



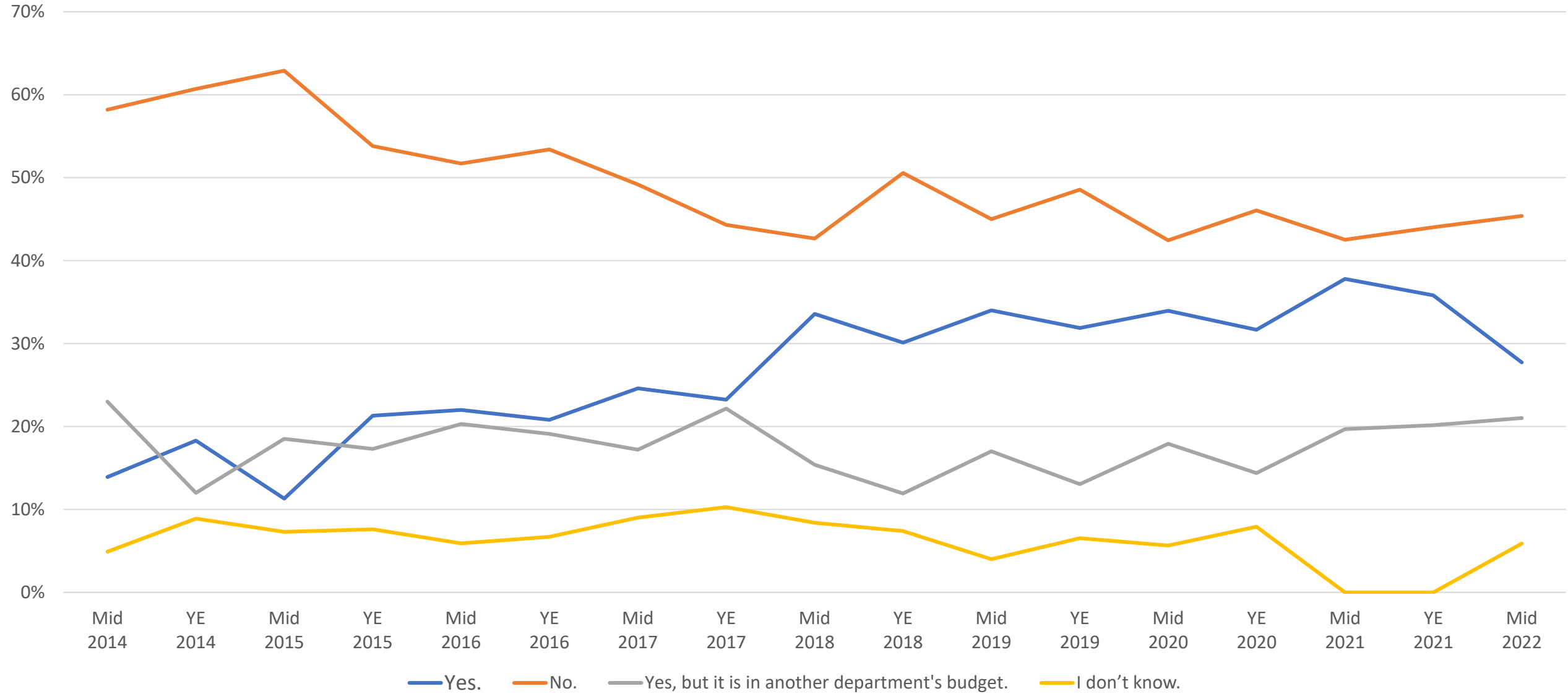


Does Membership have a dedicated line item in the budget for digital marketing (e.g., online advertising, social media campaigns, email marketing)?



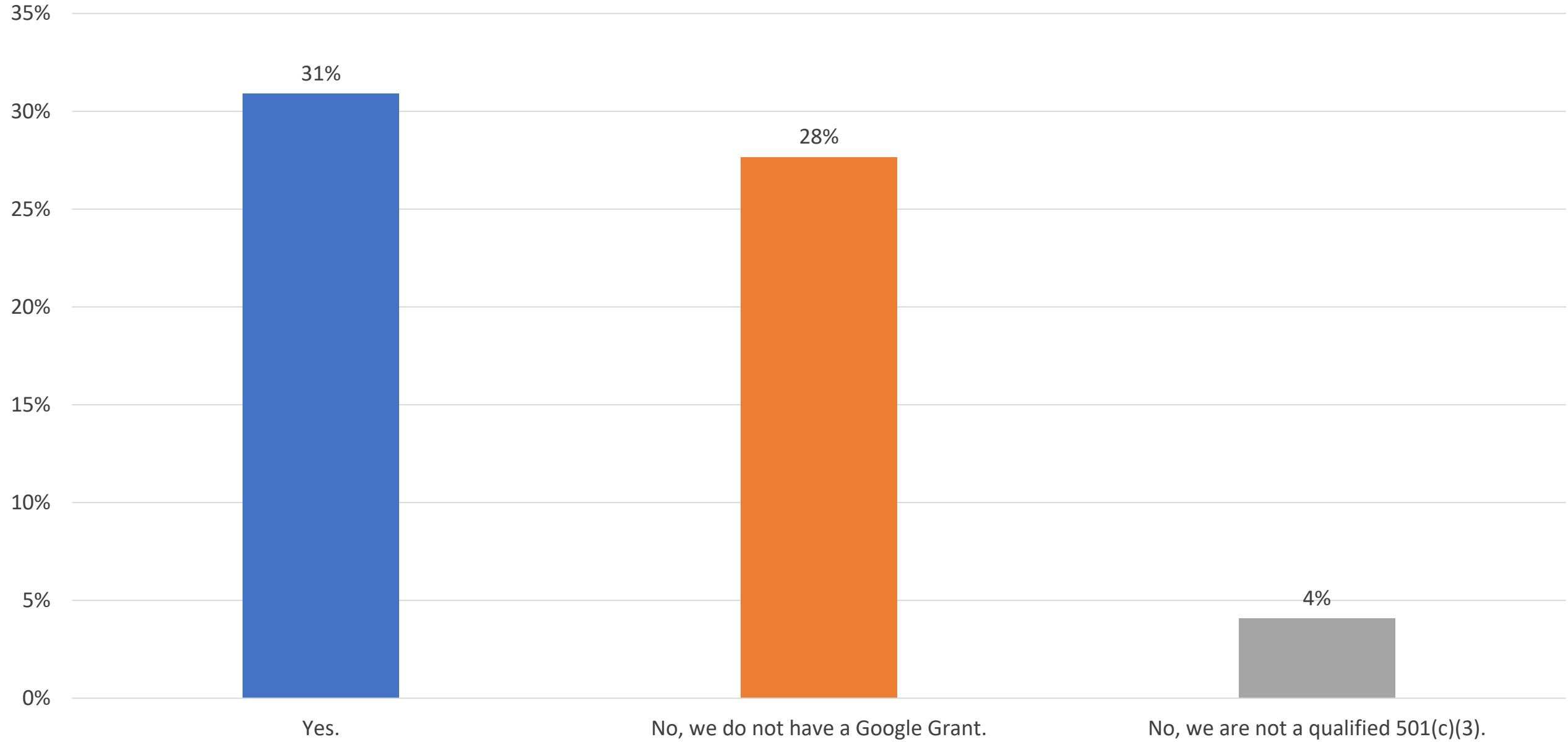


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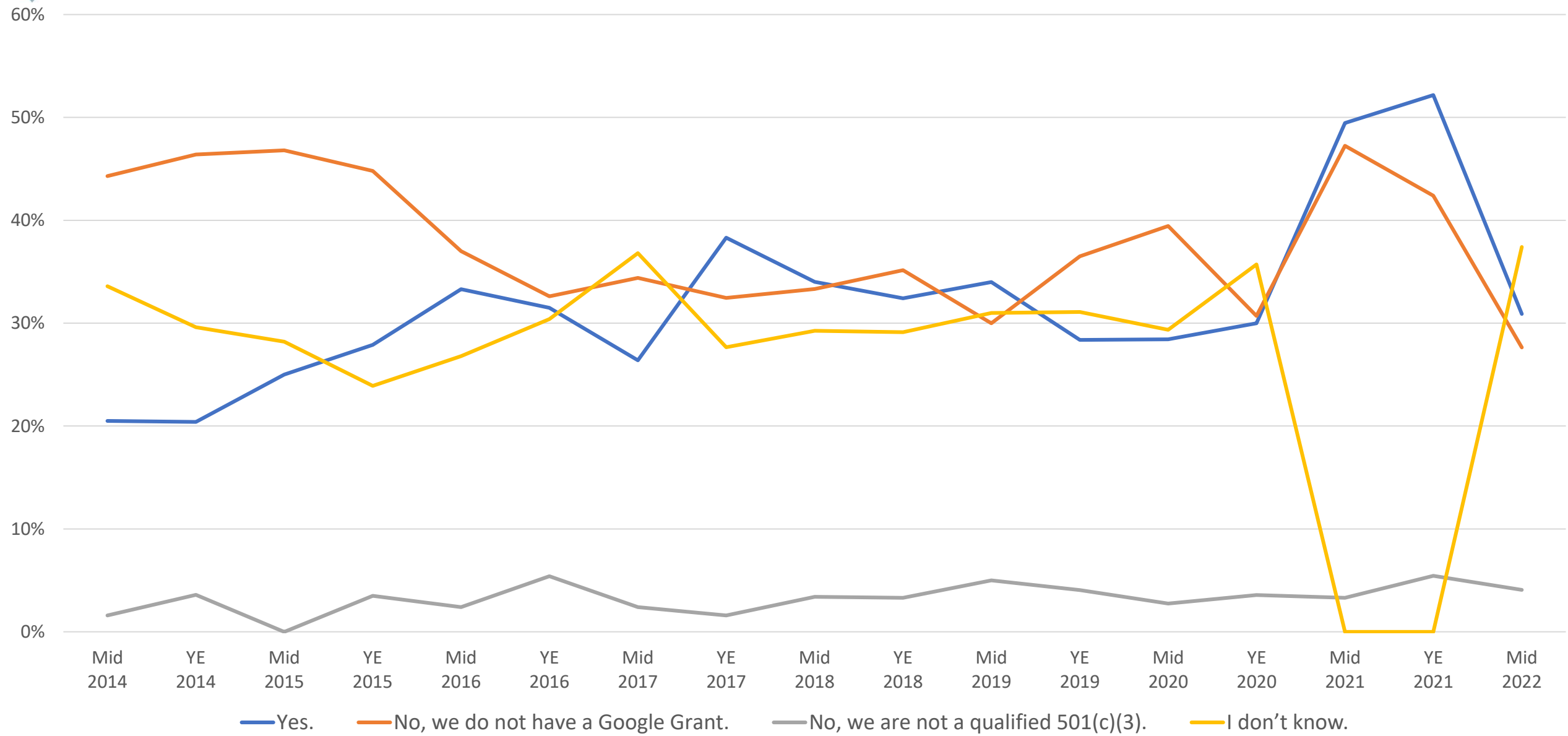


Does your organization have a Google Grant for online advertising (i.e., Google AdWords)?





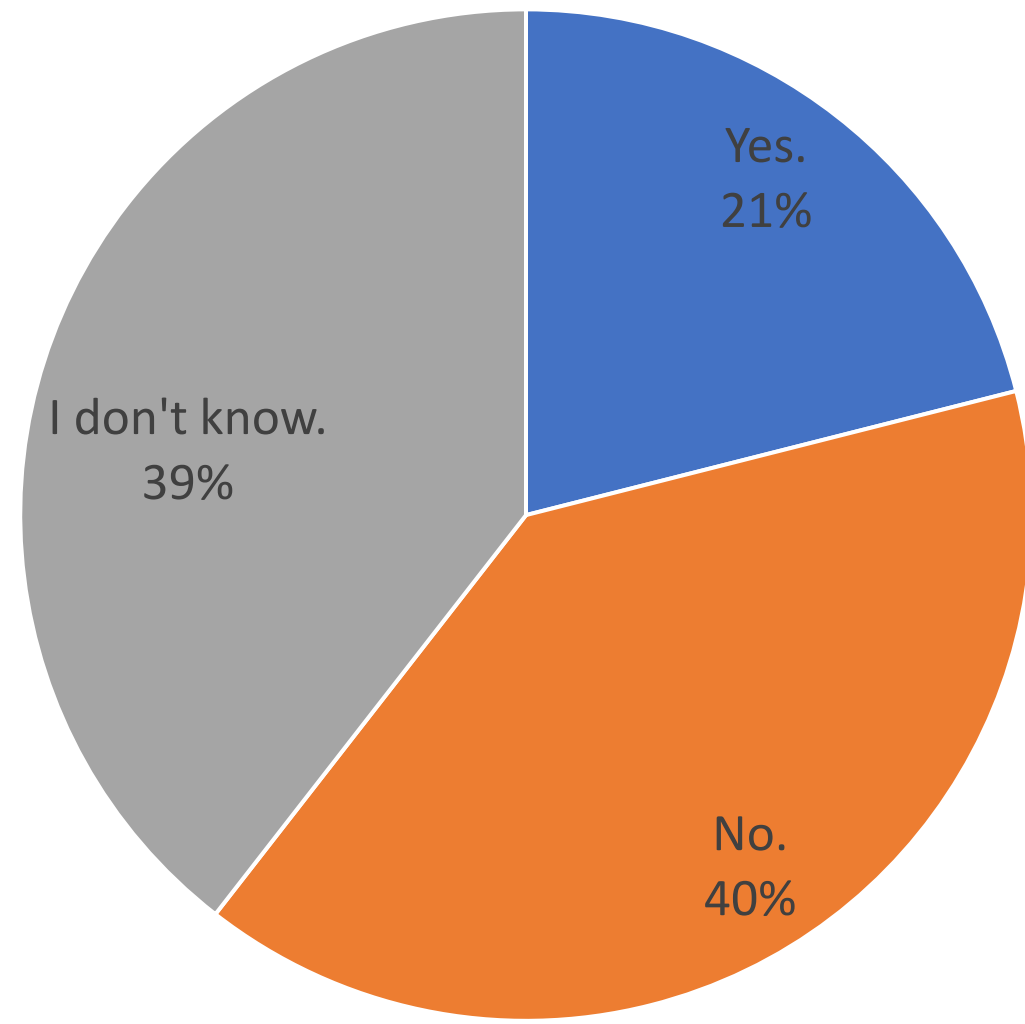
Does your organization have a Google Grant for online advertising (i.e., Google AdWords)?



— Yes. — No, we do not have a Google Grant. — No, we are not a qualified 501(c)(3). — I don't know.

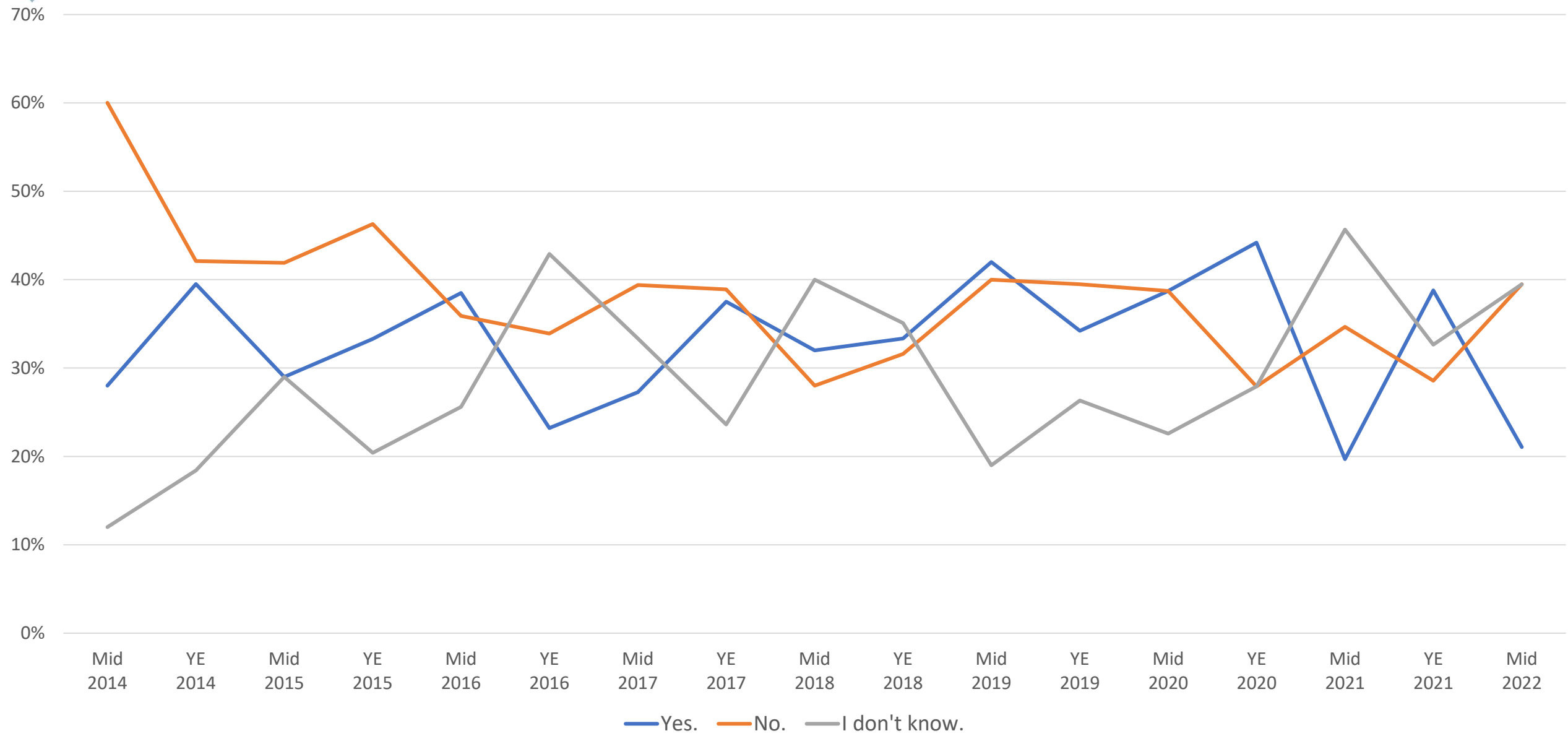


Is Membership acquisition supported by membership advertising as portion of the Google Grant?



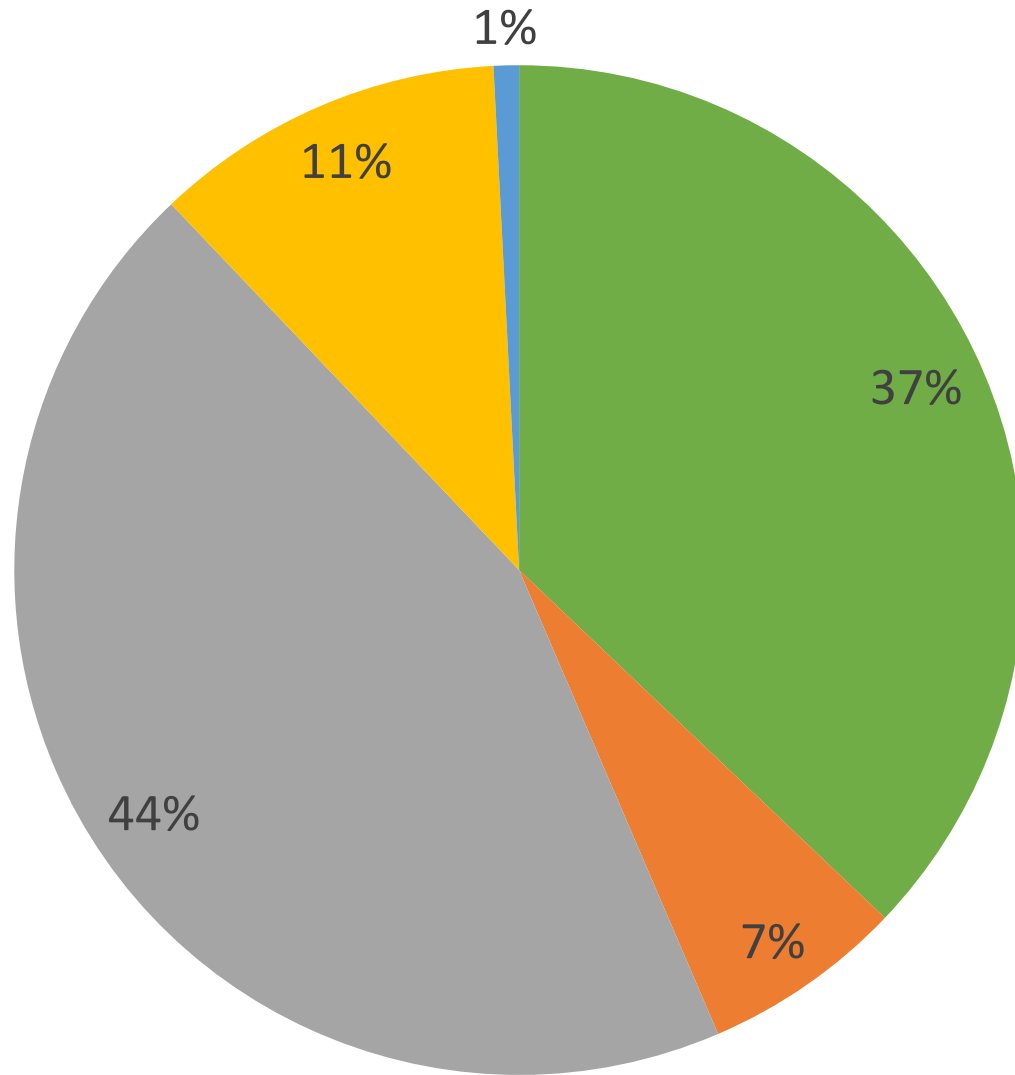


Is Membership acquisition supported by membership advertising as a portion of the Google Grant?





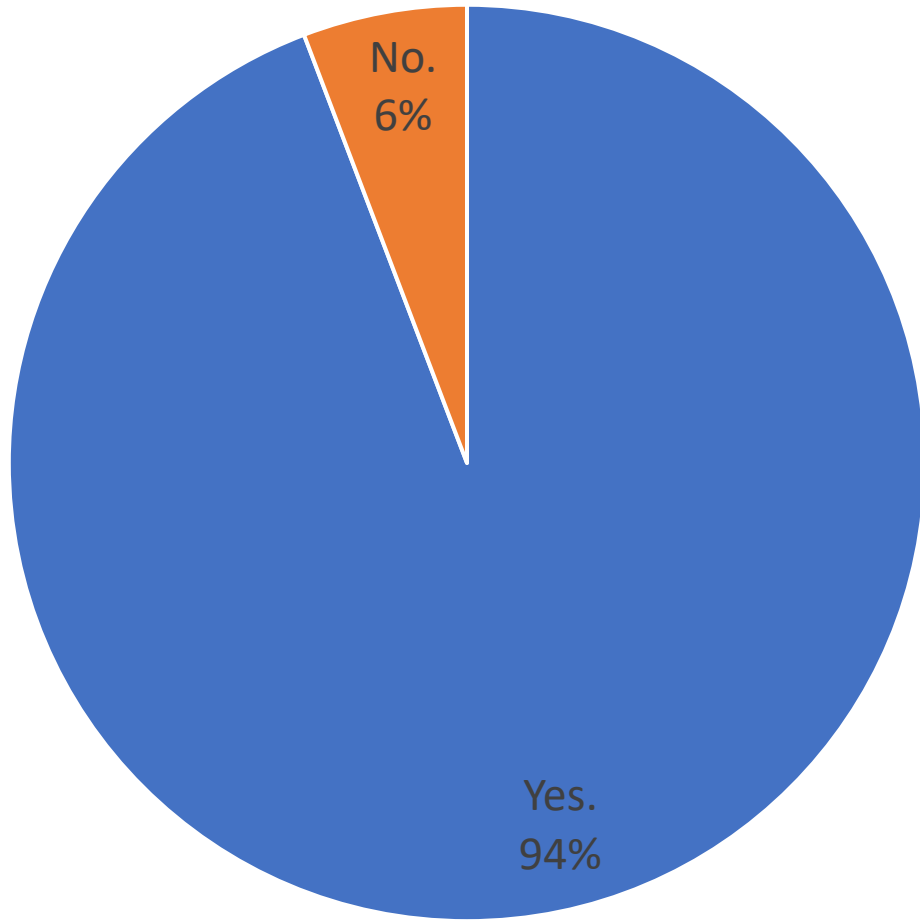
Are you currently able to deliver digital membership cards to your members?



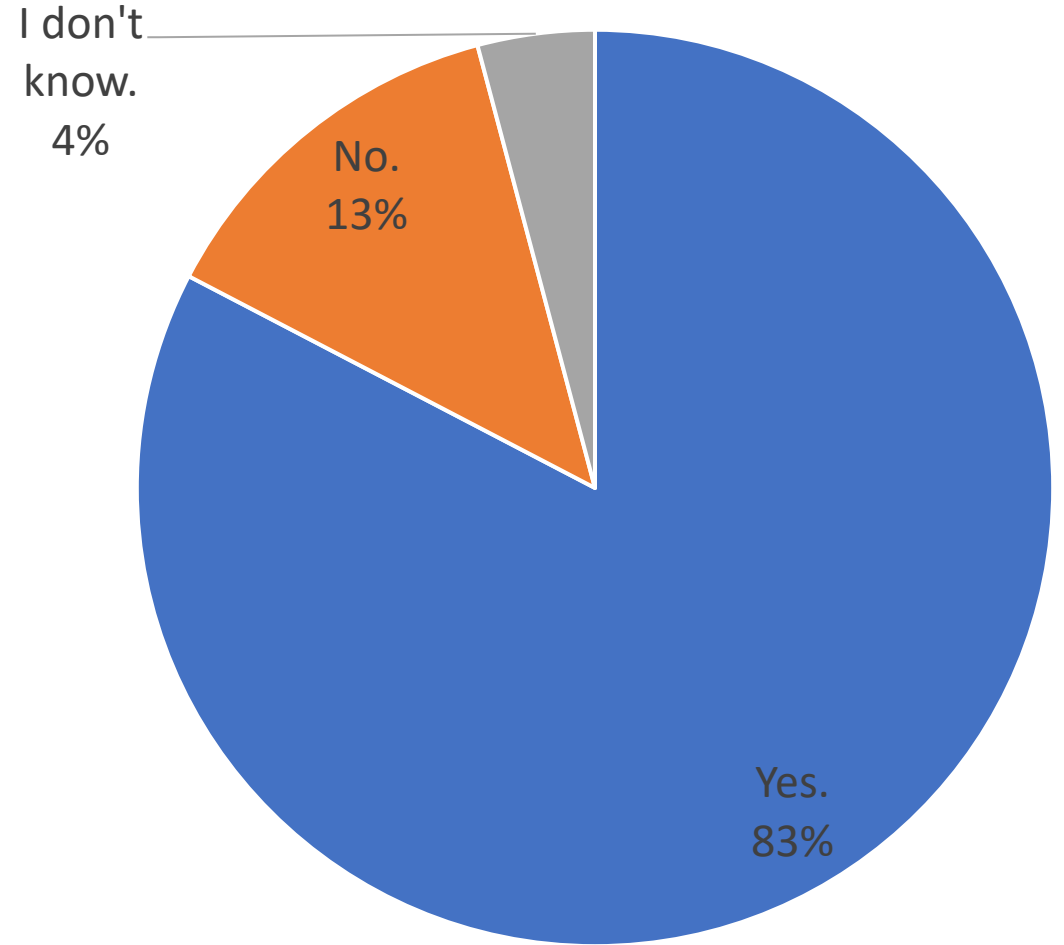
- Yes, and we do offer this service to members.
- Yes, but we do not offer this service to members.
- No, we are unable to offer this service to members, but would like to offer it to members.
- No, we are unable to offer this service to members, and do not wish to offer it to members.
- I don't know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



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

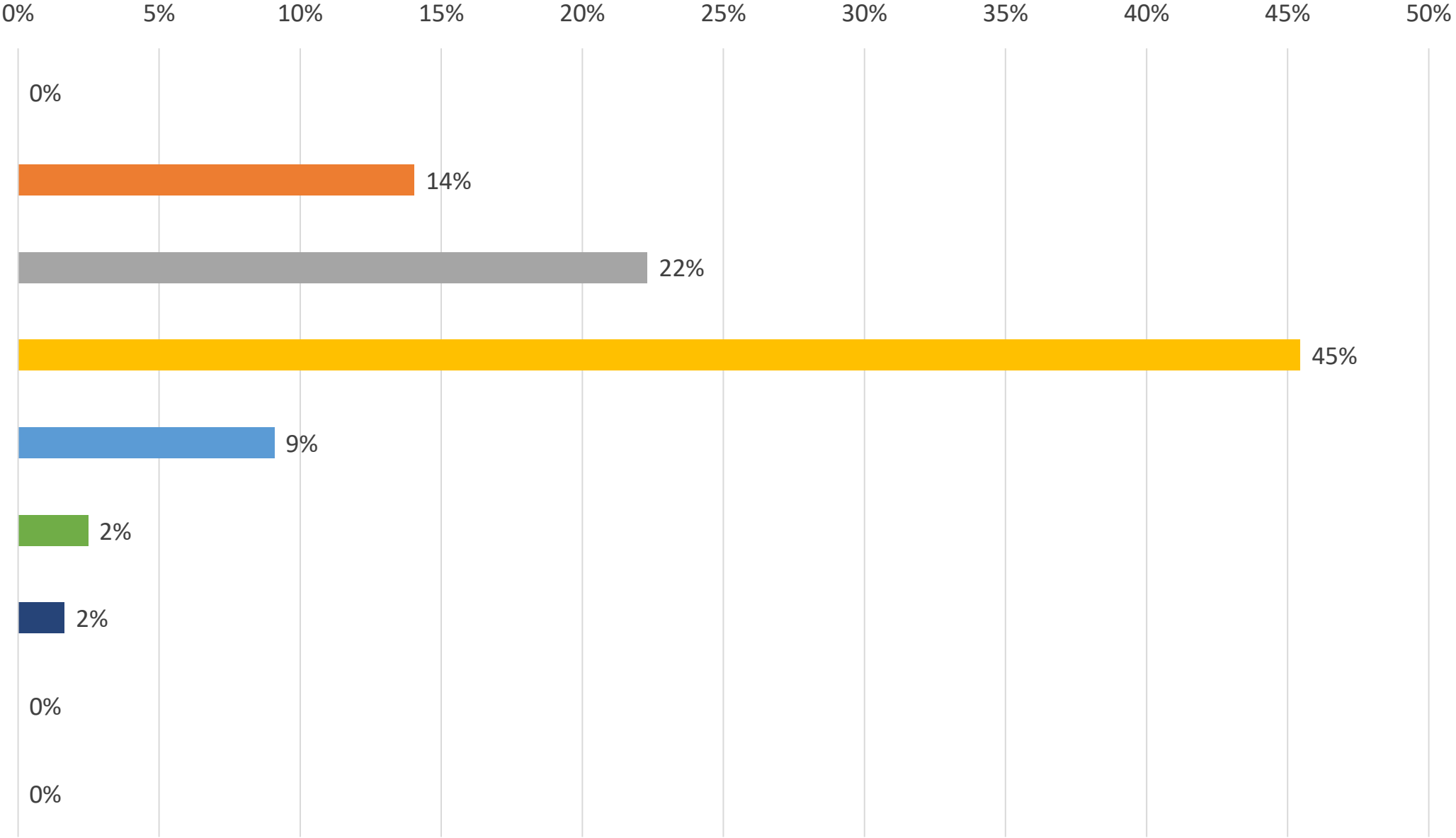


Are you able to send promotional emails about membership to the institutional house list (e.g., ticket buyers, visitors, etc.)?



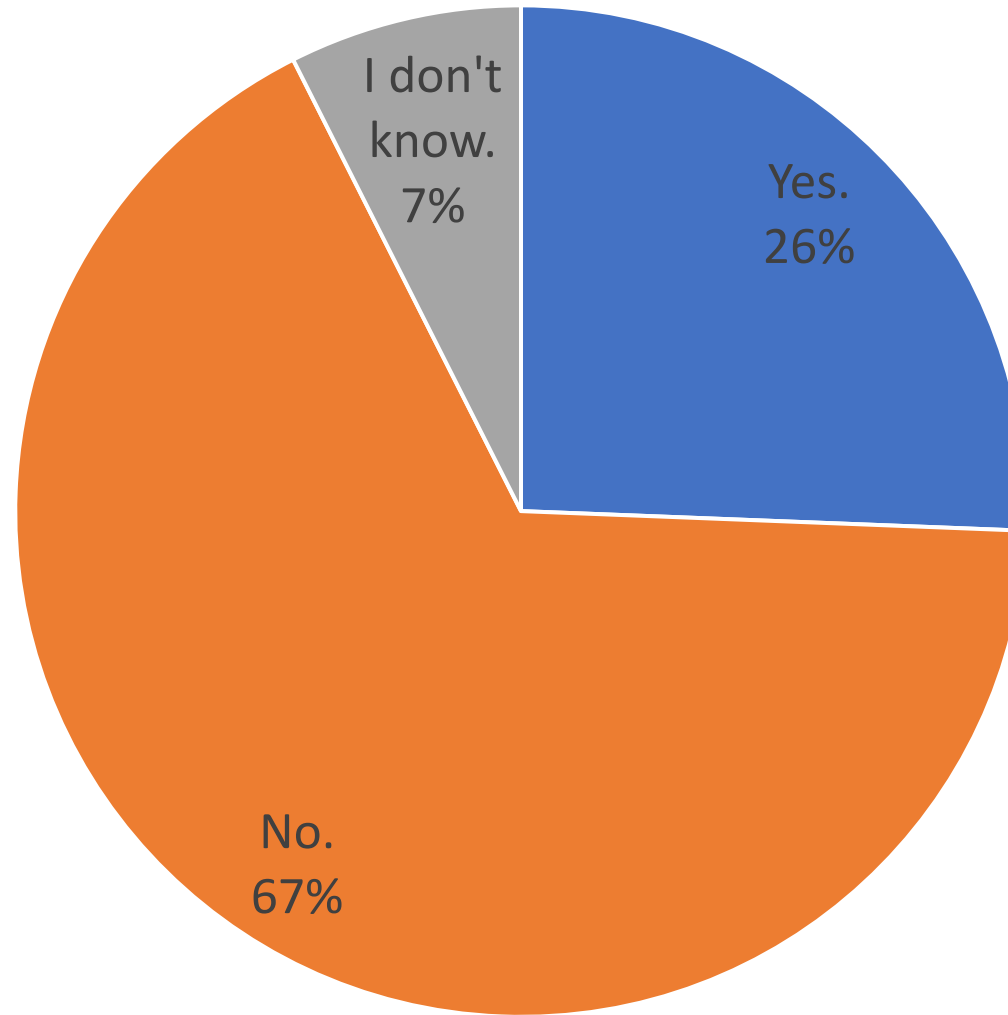


How often do your members receive email communication from your organization?





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





Recap – Digital, Online, Social Media and Mobile Marketing

- Online & digital communications are very important
- Budgeting for digital is important
- Increases in digital member card usage among institutions
- Still a need for more access for membership managers for digital reporting and analytics
- Promotional days often are successful for membership promotions
- Recommend 24 to 48 email touches annually for members



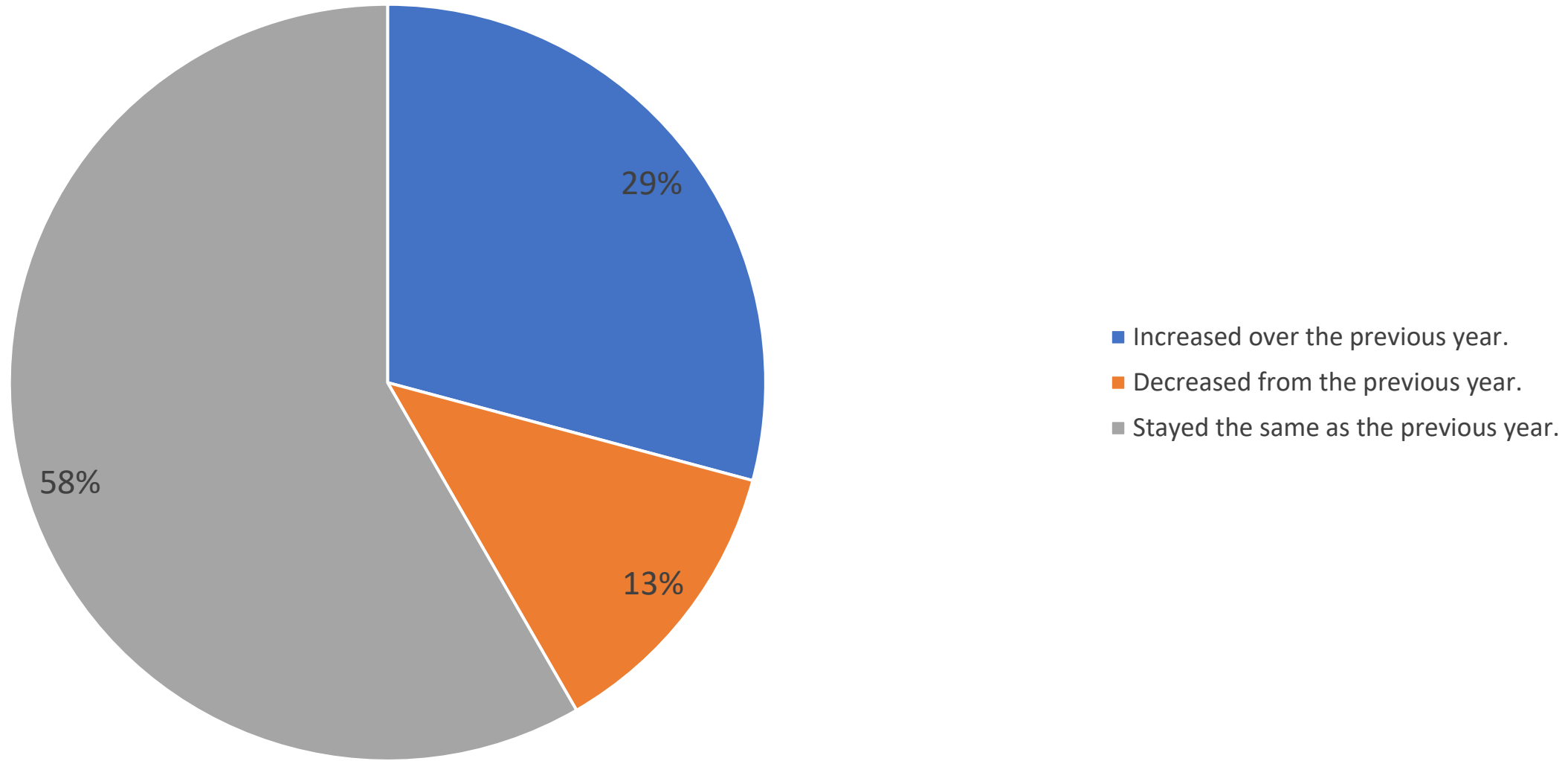
Staffing and Salary

Pulse 2022 Mid-Year Data



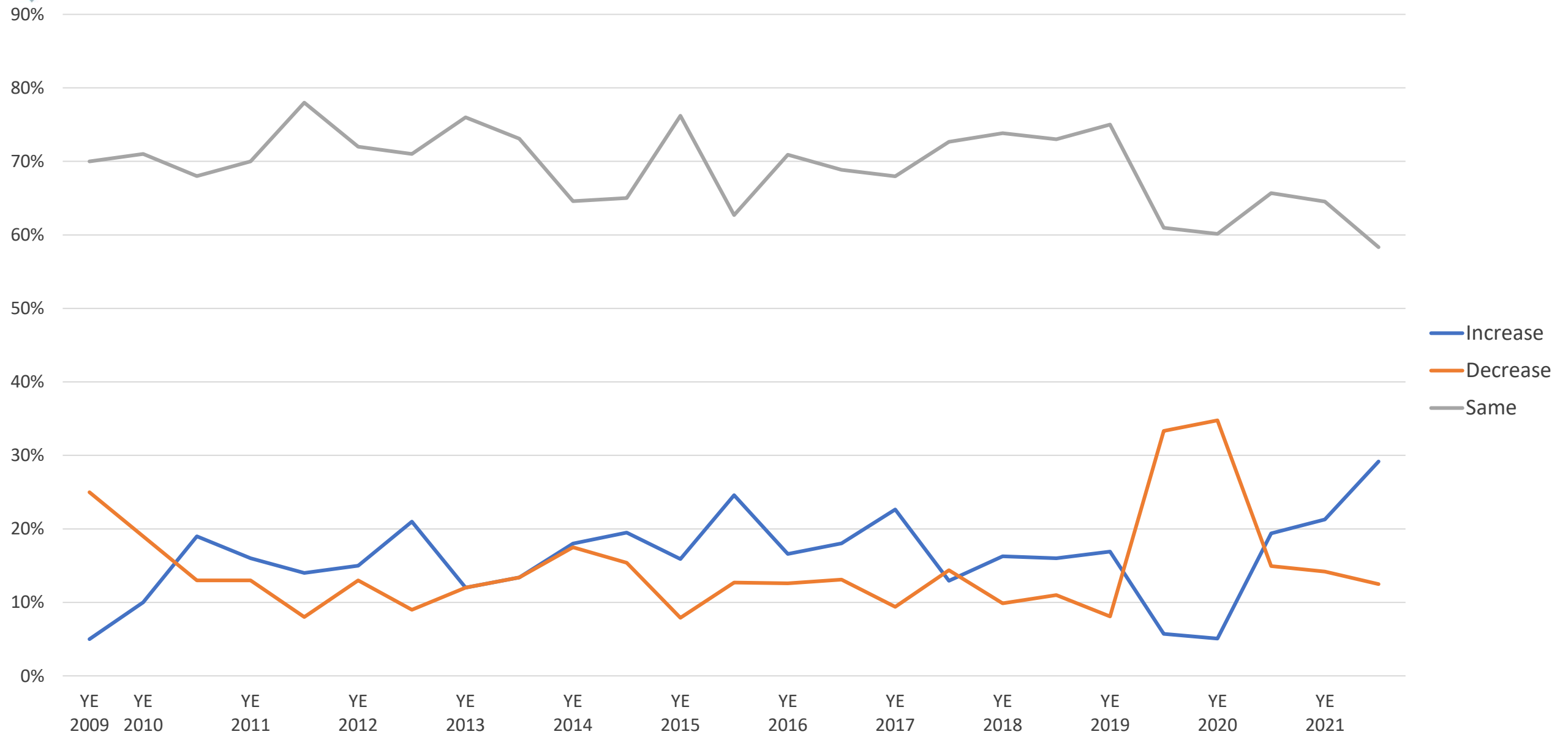


In 2022 year-to-date, staffing levels within the membership department...



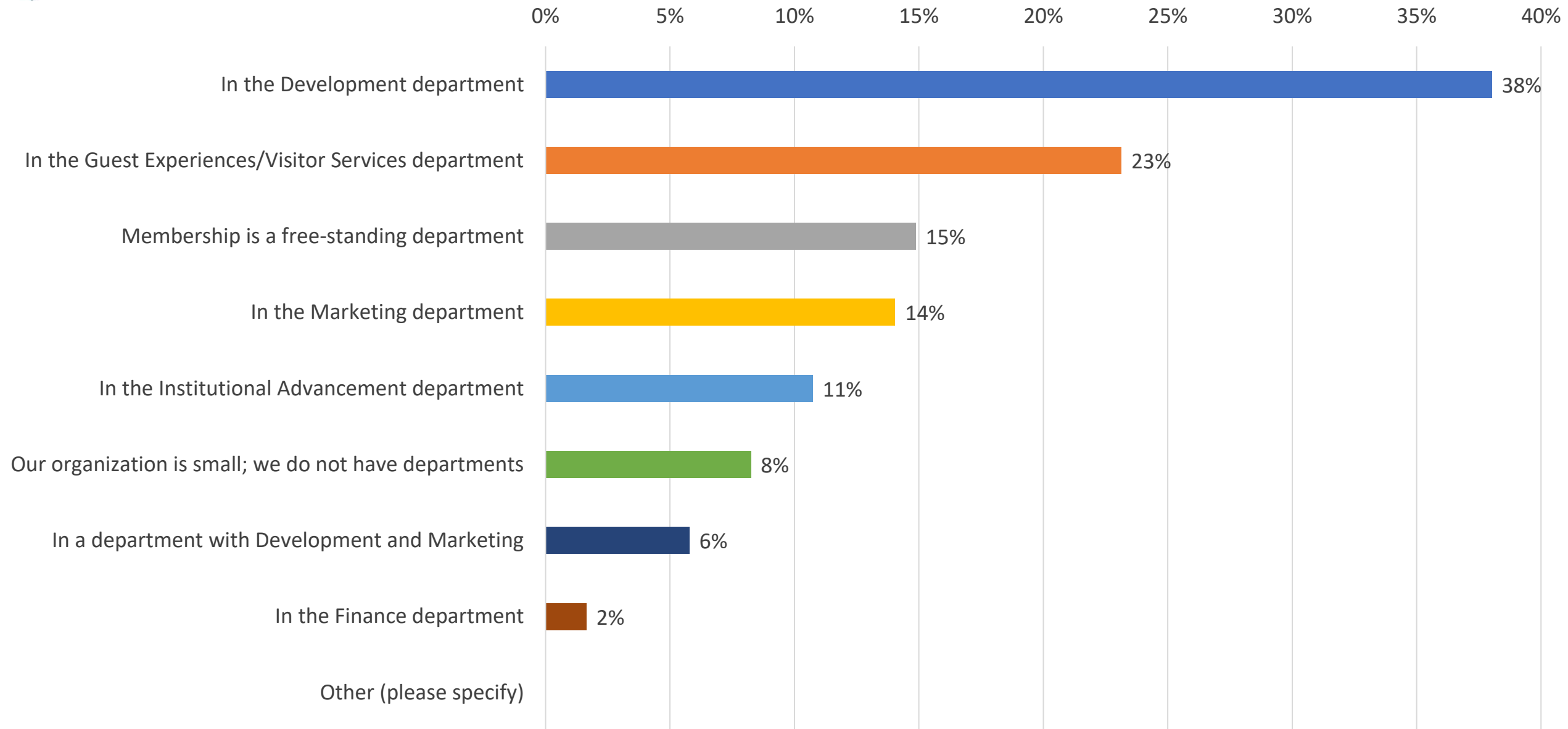


Staffing Levels



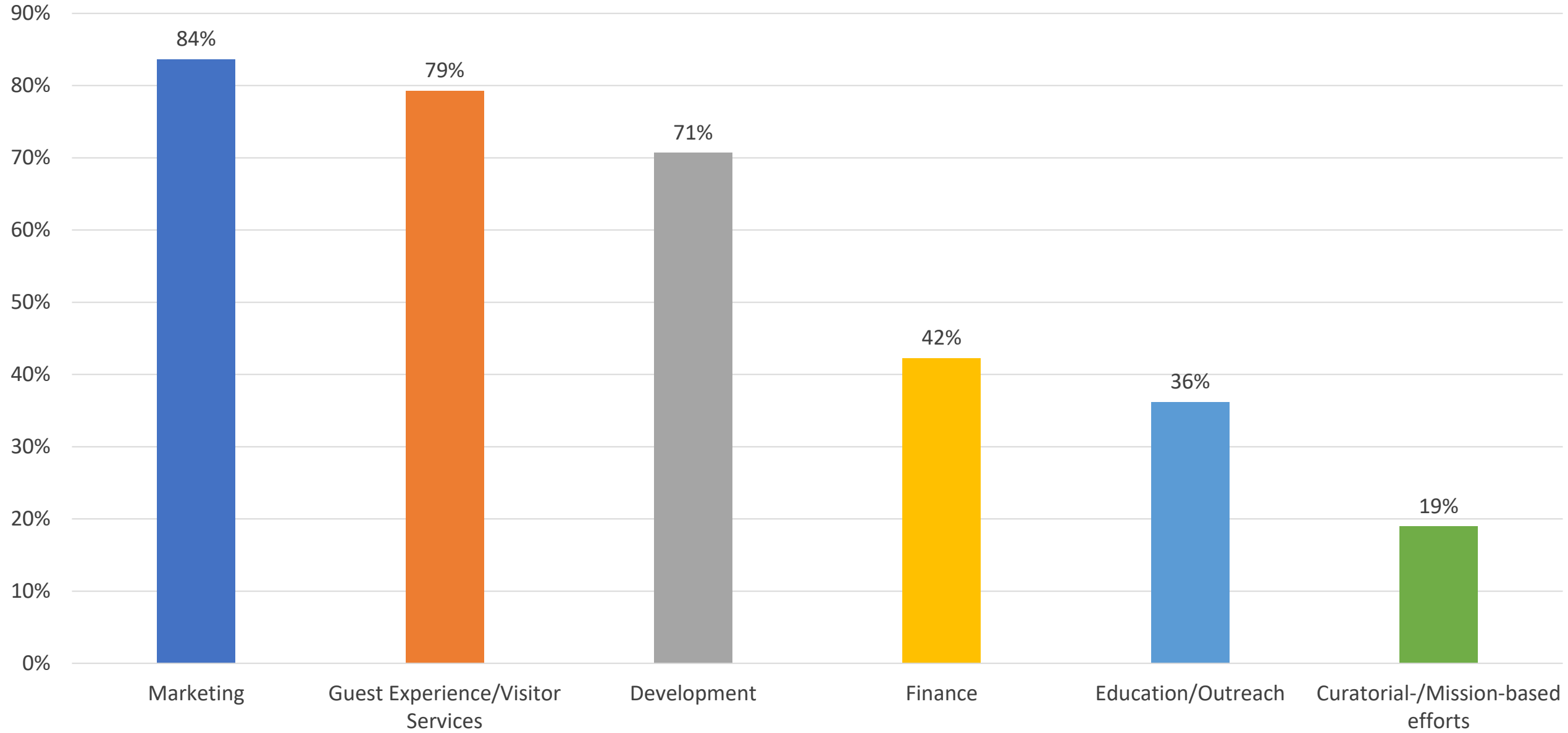


How is Membership positioned in your organization? (Check all that apply.)



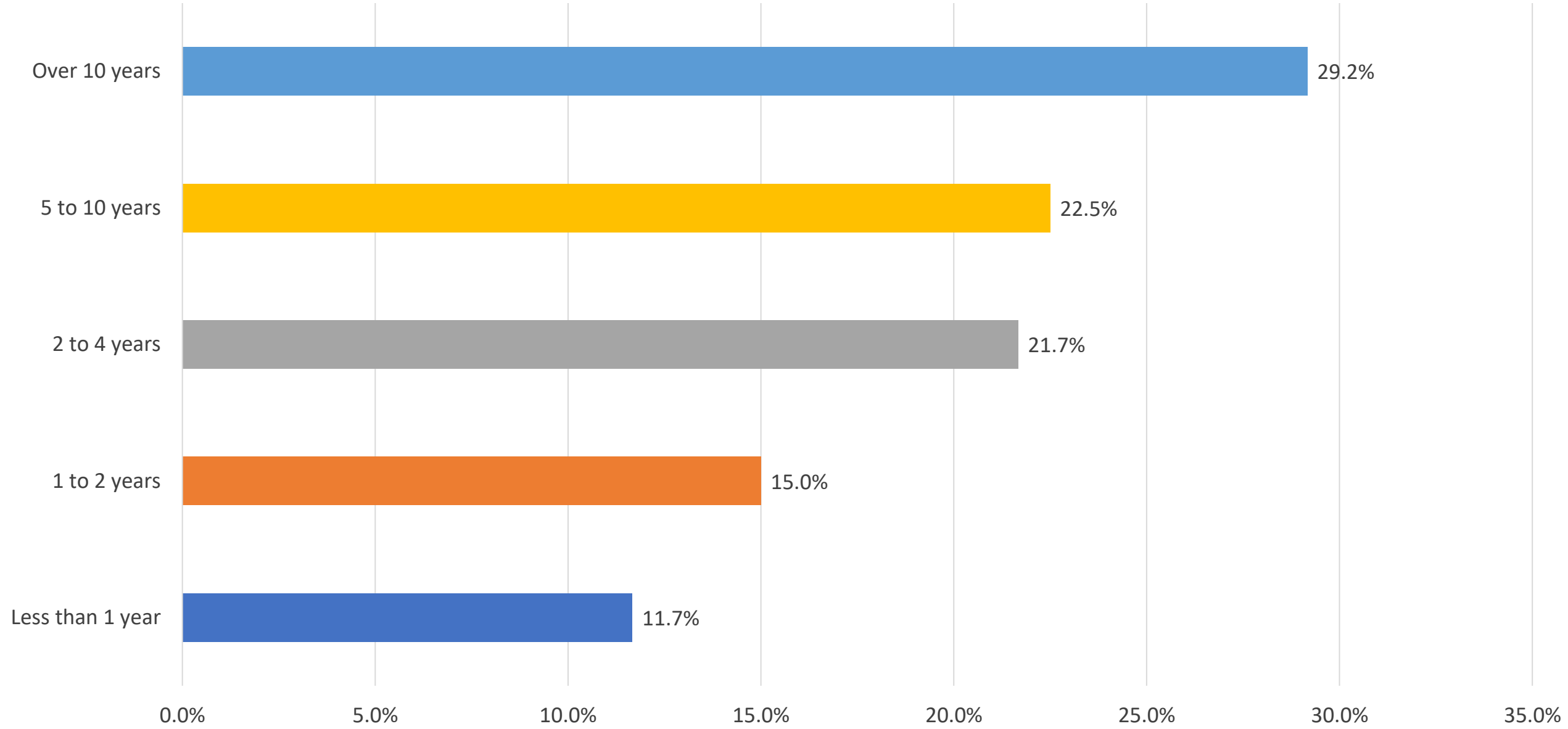


Does membership planning occur with and do you have the support of the following departments?



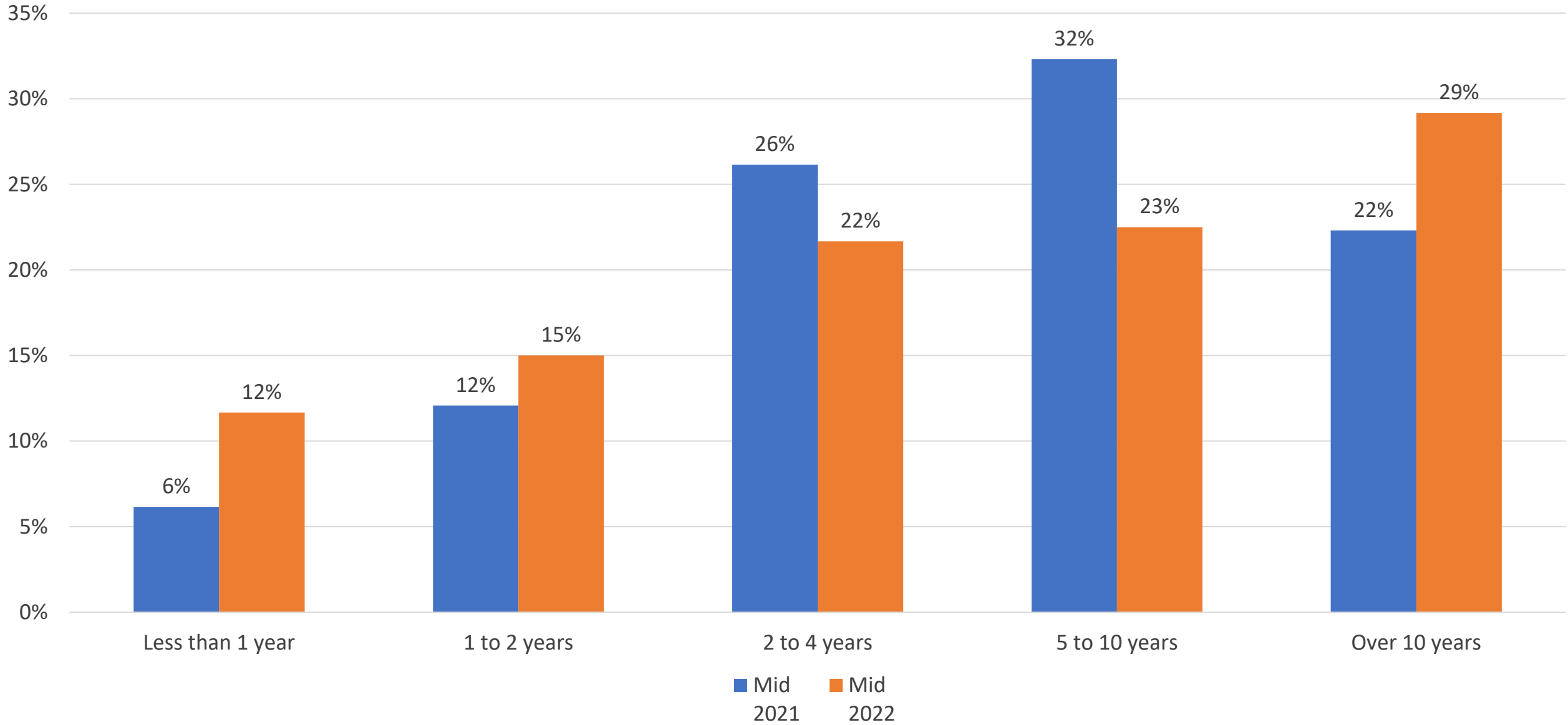


How long have you served in a membership position?



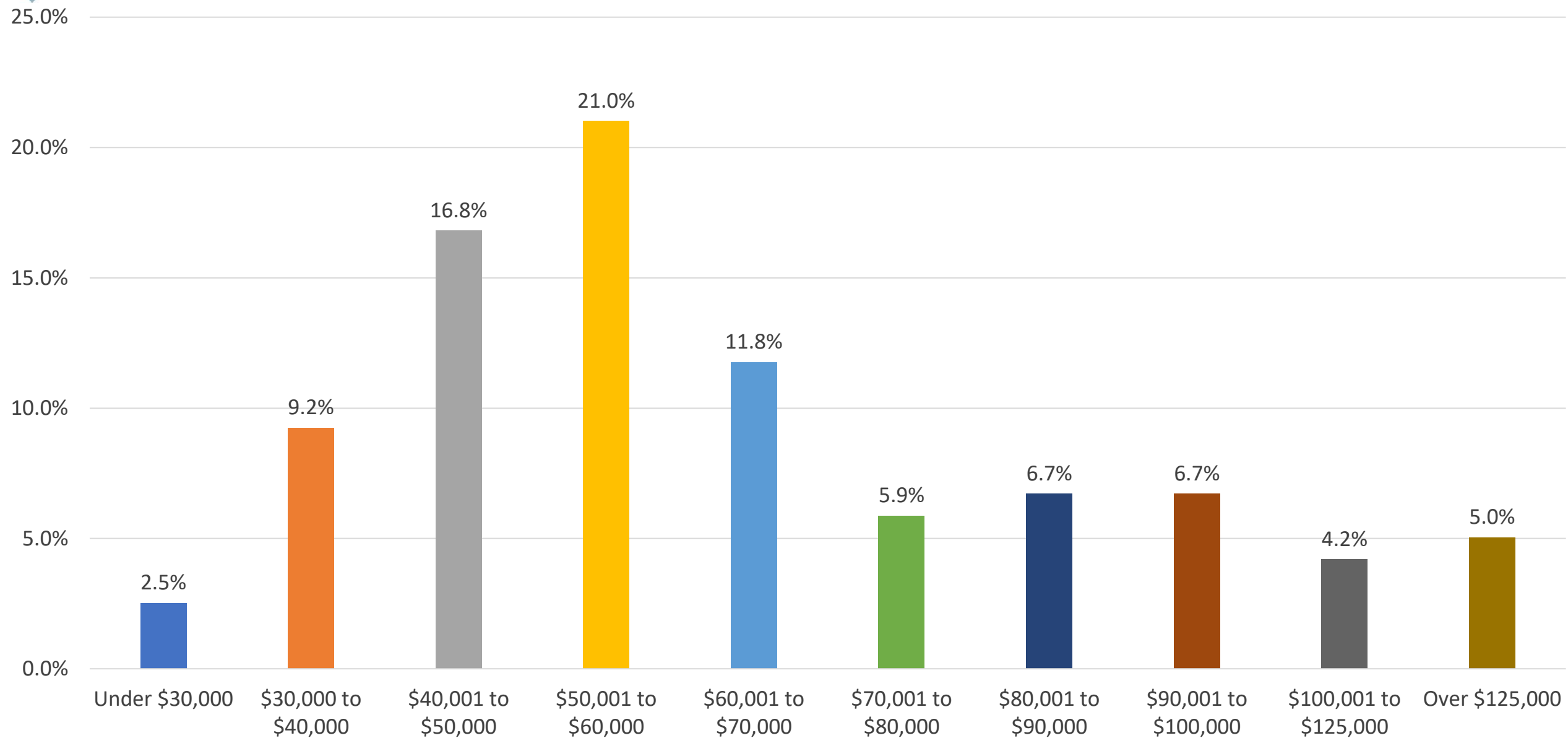


How long have you served in a membership position?



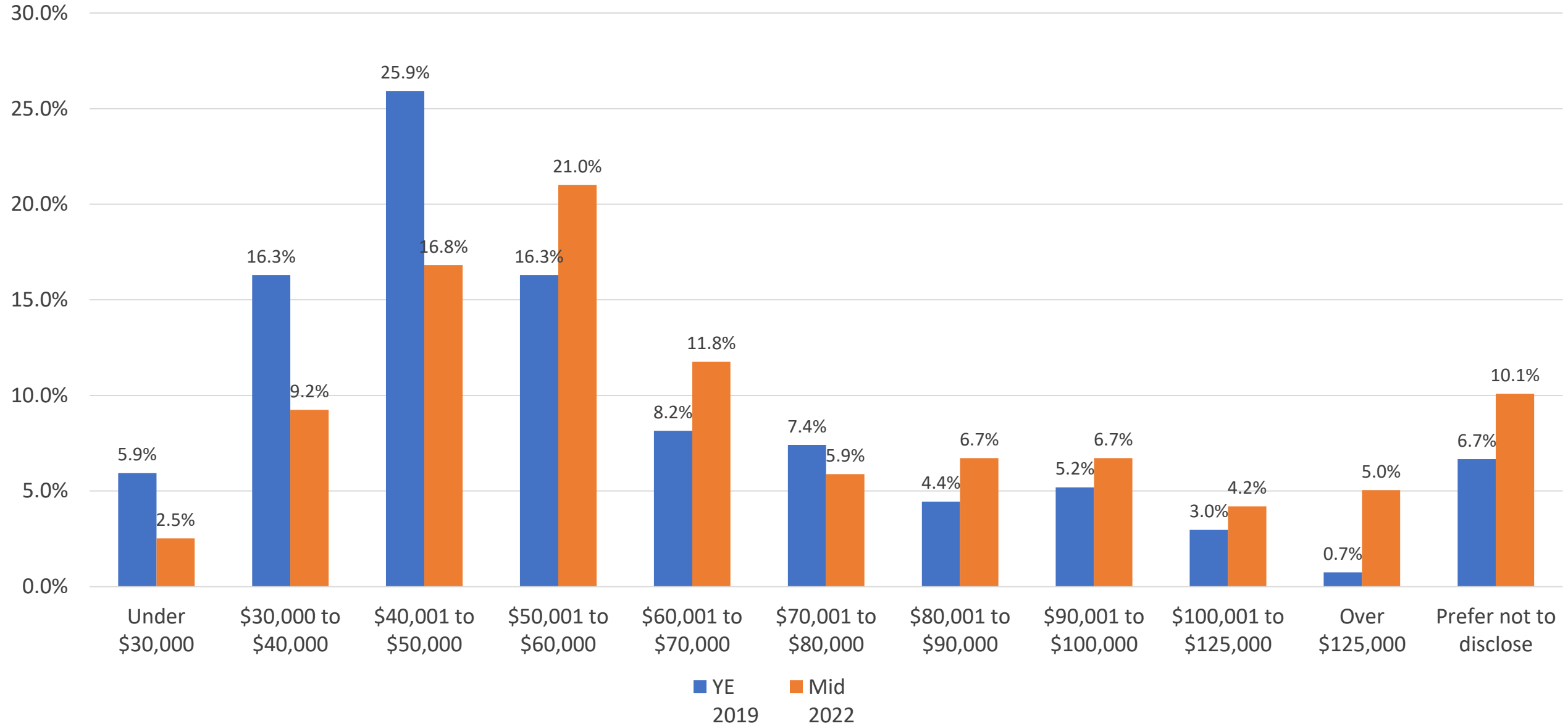


What is your annual salary range?





What is your annual salary range?



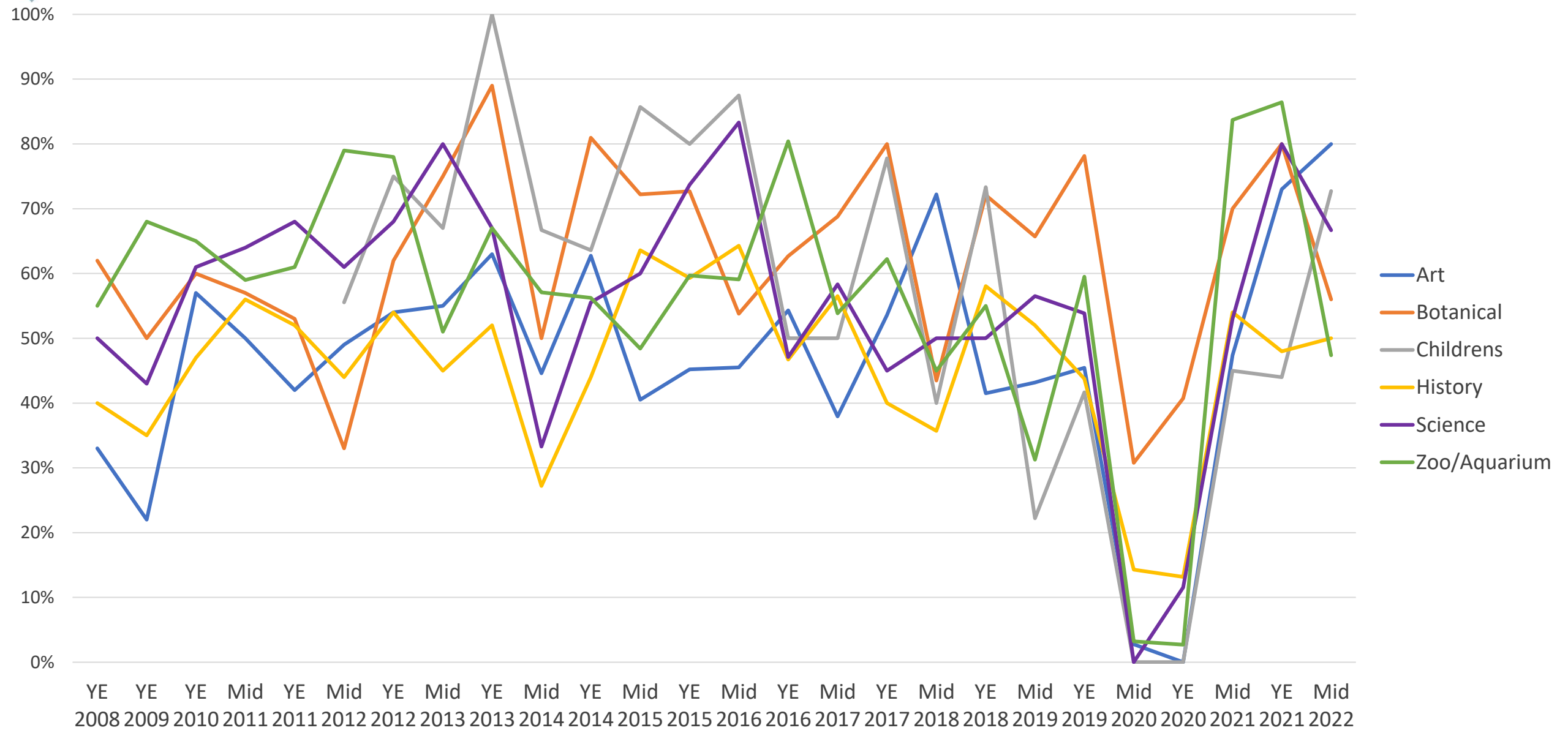


Trends by Niche Audience

Pulse 2022 Mid-Year Data

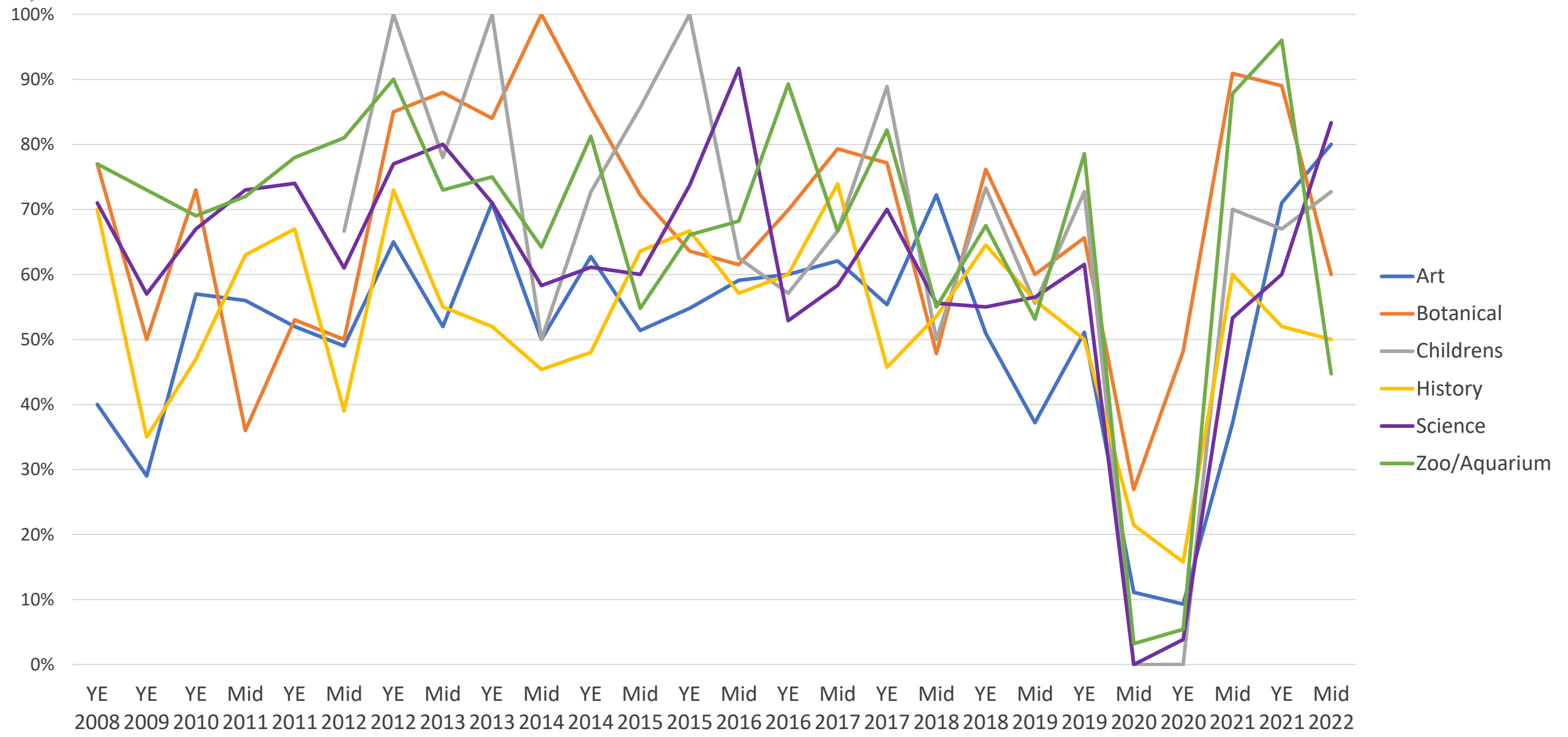


Membership increase from last year



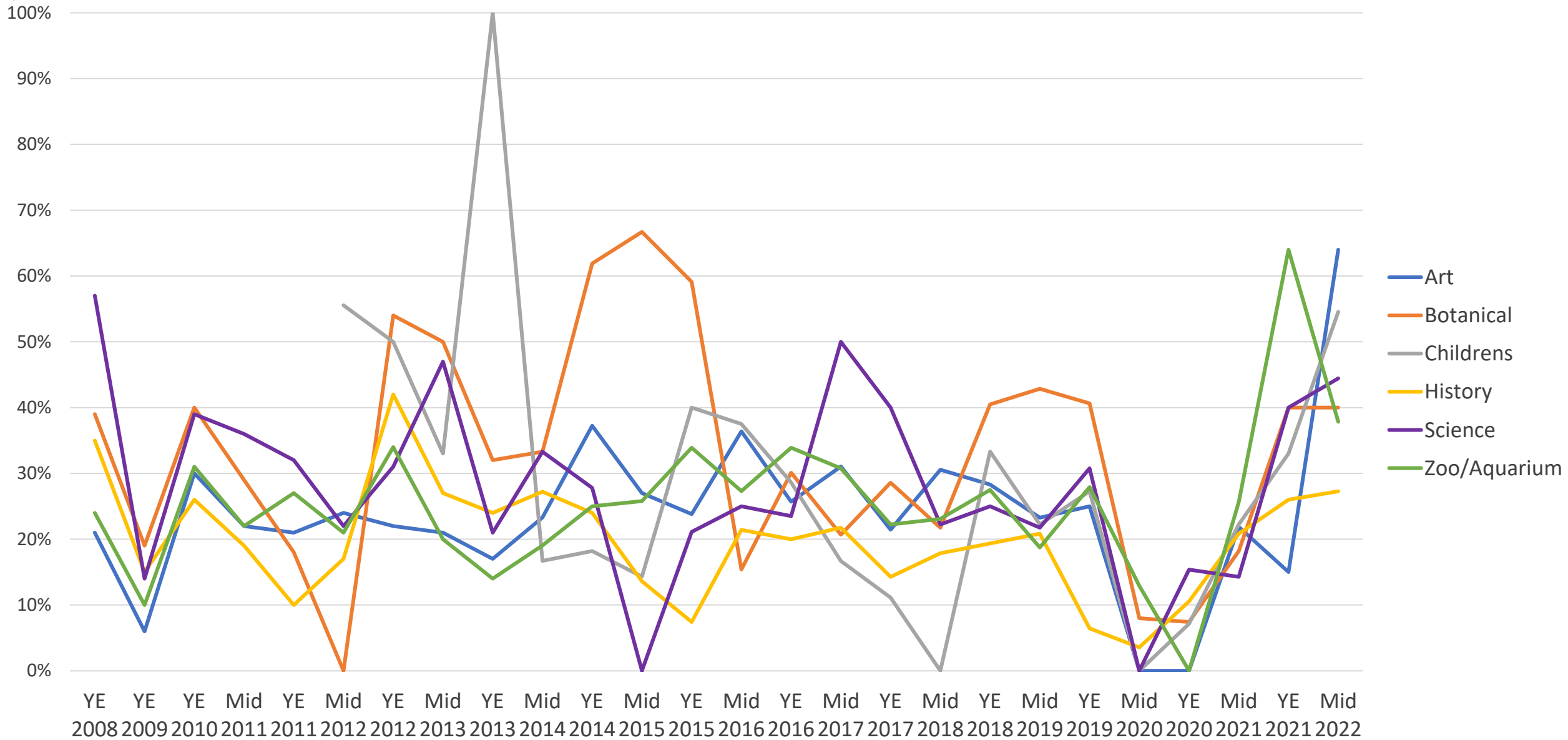


Increased Revenue over last year



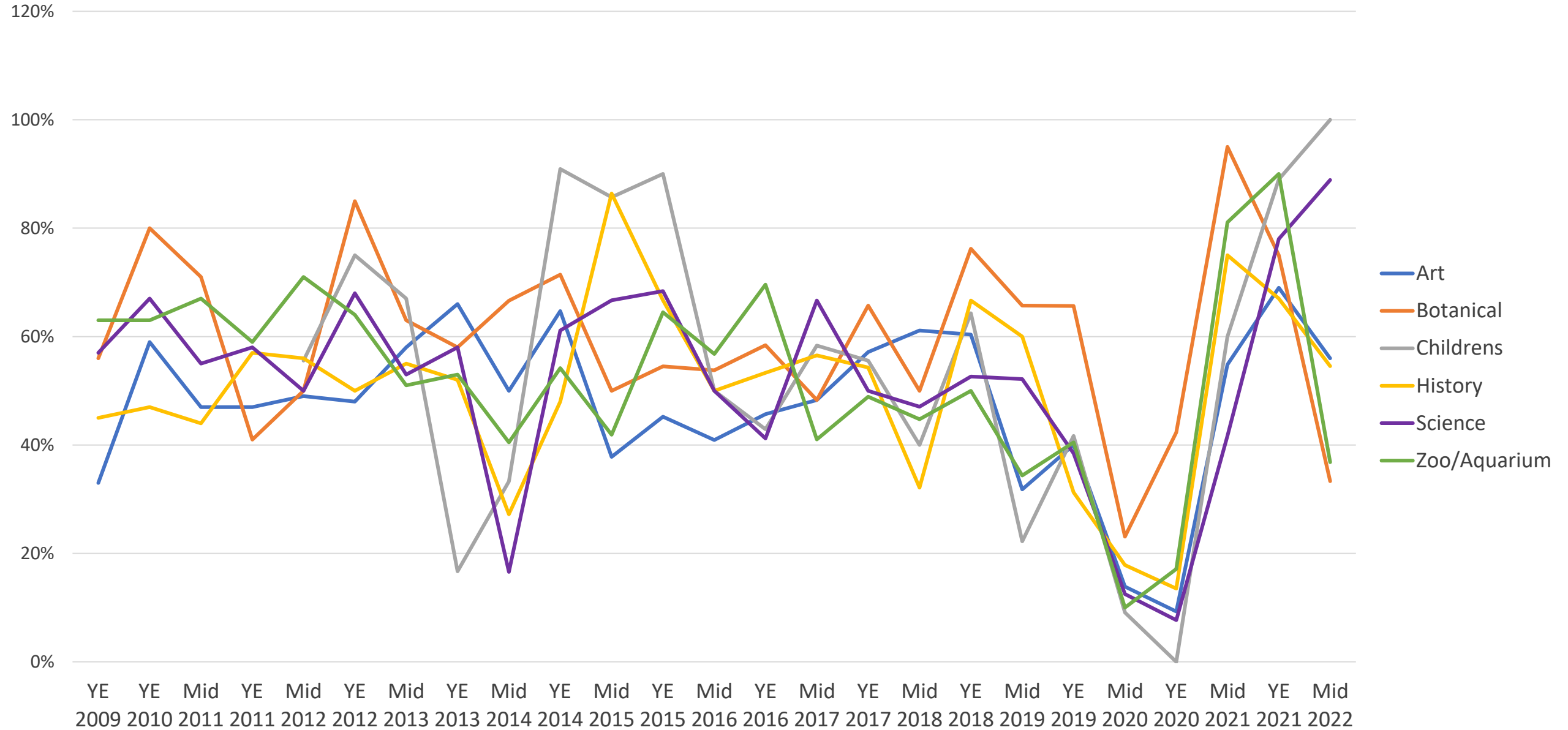


Budgets Increased over last year



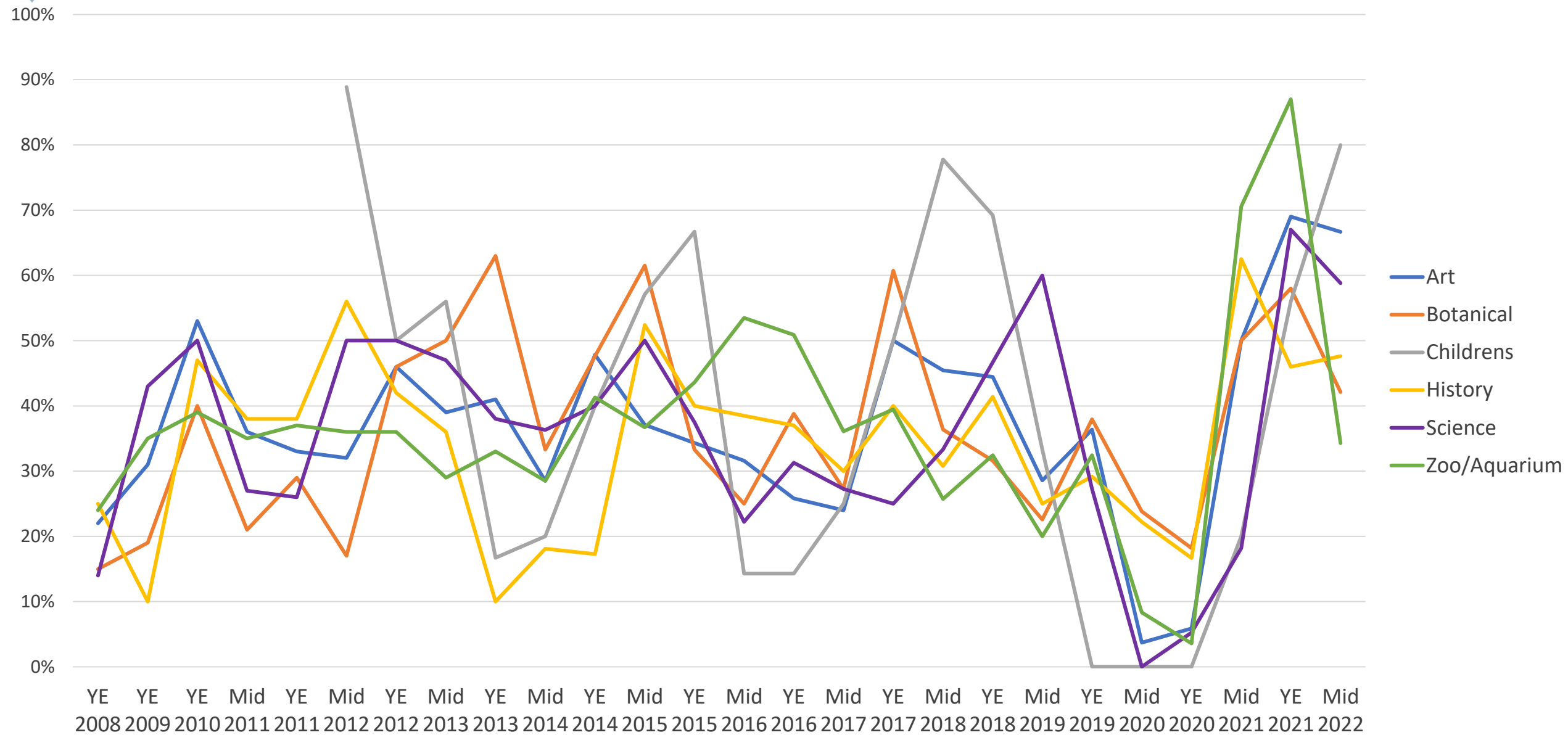


More new members this year than last year



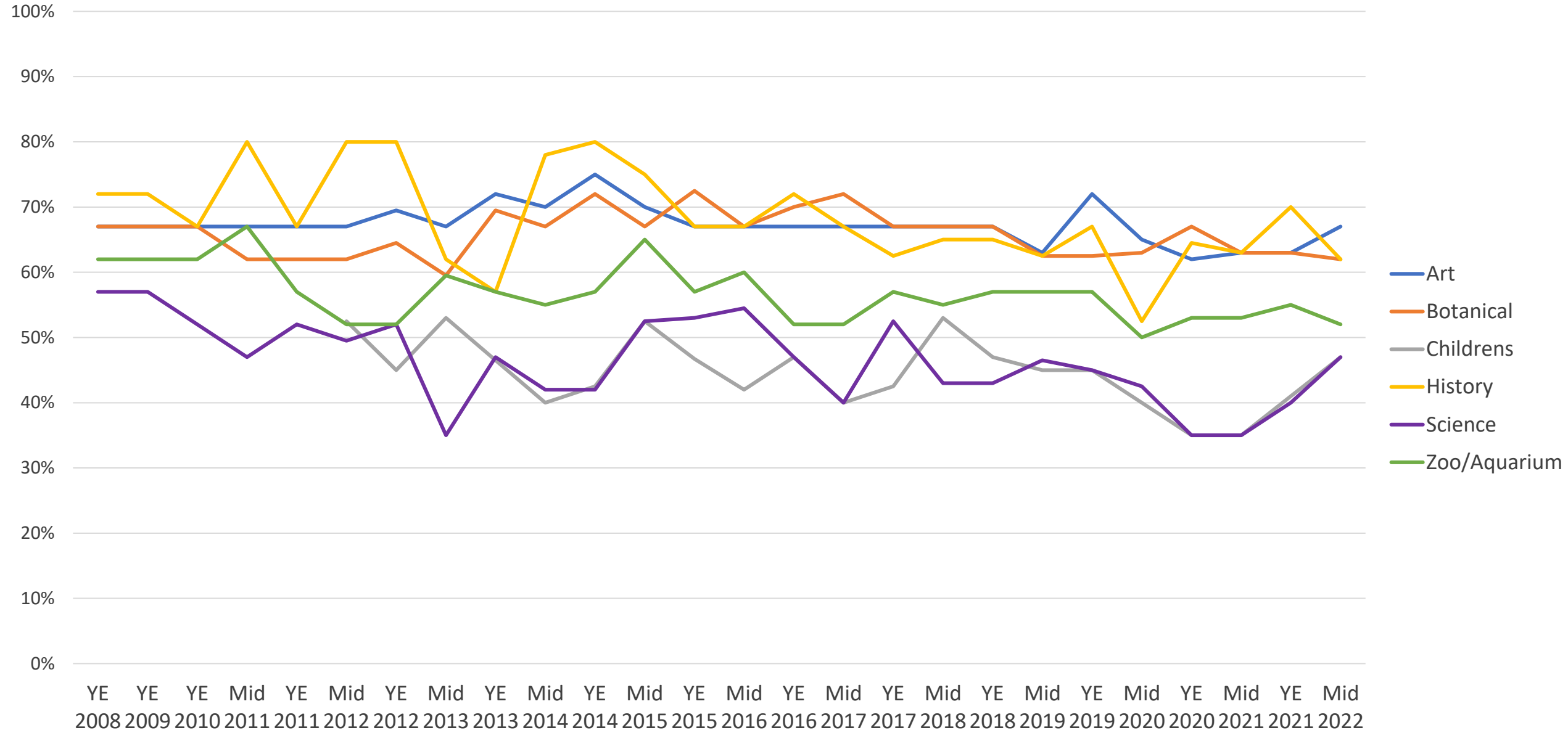


Renewal rates improved this year over last





Median Renewal Rate





Highlights – Children’s Museums

Mid-Year 2022

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

Mid-Year 2021

- Reported *increase*
 - 44% membership totals
 - 67% revenues
 - 33% expenditure budgets
 - 89% new members
 - 78% visitation
 - 56% renewals
- Median Renewal Rate = 41%



Highlights – Science Museums

Mid-Year 2022

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

Mid-Year 2021

- Reported *increase*
 - 80% membership totals
 - 60% revenues
 - 40% expenditure budgets
 - 78% new members
 - 75% visitation
 - 67% renewals
- Median Renewal Rate = 40%



Highlights – Art Museums

Mid-Year 2022

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

Mid-Year 2021

- Reported *increase*
 - 73% membership totals
 - 71% revenues
 - 15% expenditure budgets
 - 69% new members
 - 48% visitation
 - 69% renewals
- Median Renewal Rate = 63%



Highlights – History Museums

Mid-Year 2022

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

Mid-Year 2021

- Reported *increase*
 - 48% membership totals
 - 52% revenues
 - 26% expenditure budgets
 - 67% new members
 - 48% visitation
 - 46% renewals
- Median Renewal Rate = 70%



Highlights – Gardens and Arboreta

Mid-Year 2022

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

Mid-Year 2021

- Reported *increase*
 - 80% membership totals
 - 89% revenues
 - 40% expenditure budgets
 - 75% new members
 - 76% visitation
 - 58% renewals
- Median Renewal Rate = 63%



Highlights – Zoos and Aquariums

Mid-Year 2022

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

Mid-Year 2021

- Reported *increase*
 - 86% membership totals
 - 96% revenues
 - 64% expenditure budgets
 - 90% new members
 - 94% visitation
 - 87% renewals
- Median Renewal Rate = 55%

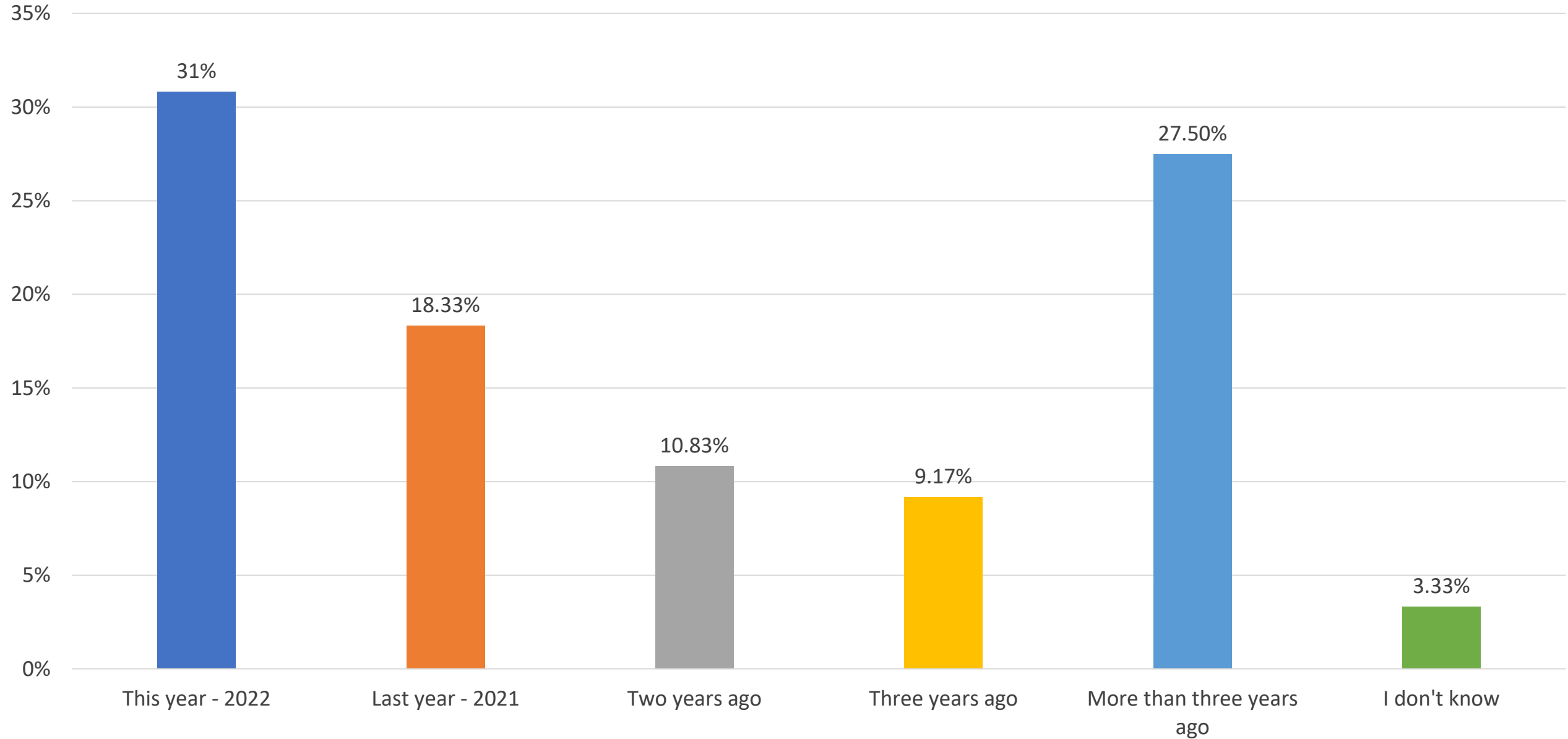


Dues, Categories and Benefits

Pulse 2022 Mid-Year Data

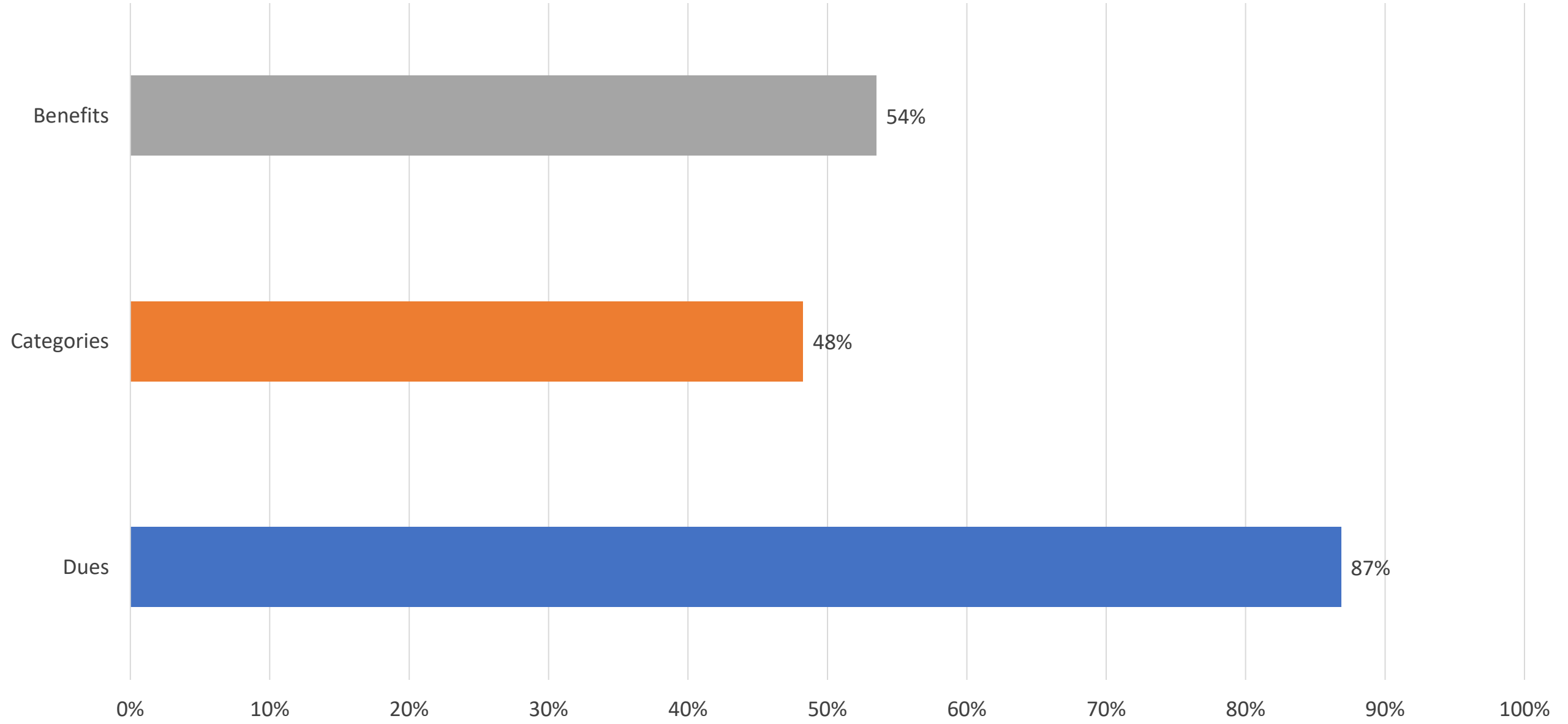


When was the last time your organization changed your dues, categories or benefit offerings?



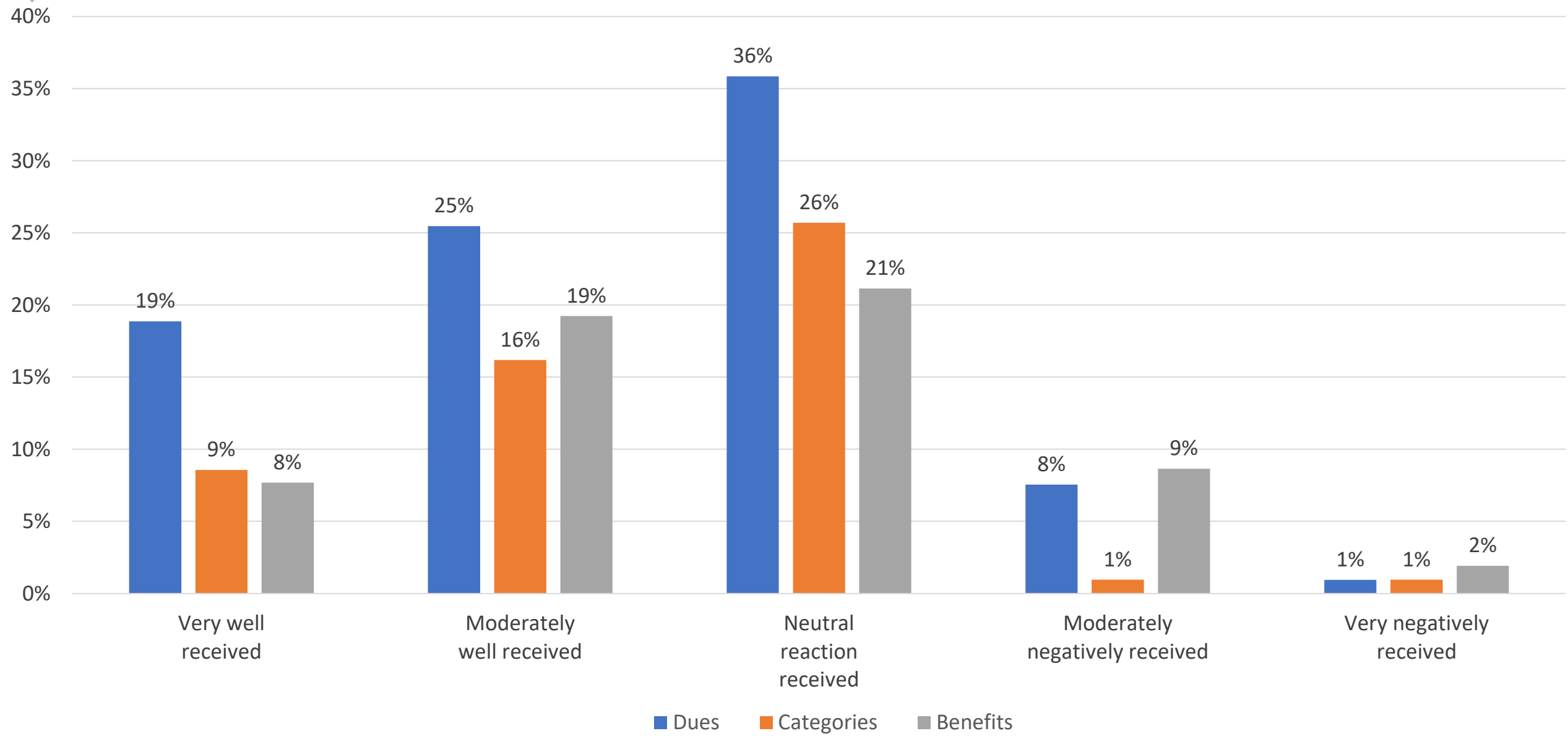


When you made these changes, what aspects did you change? (Check all that apply.)



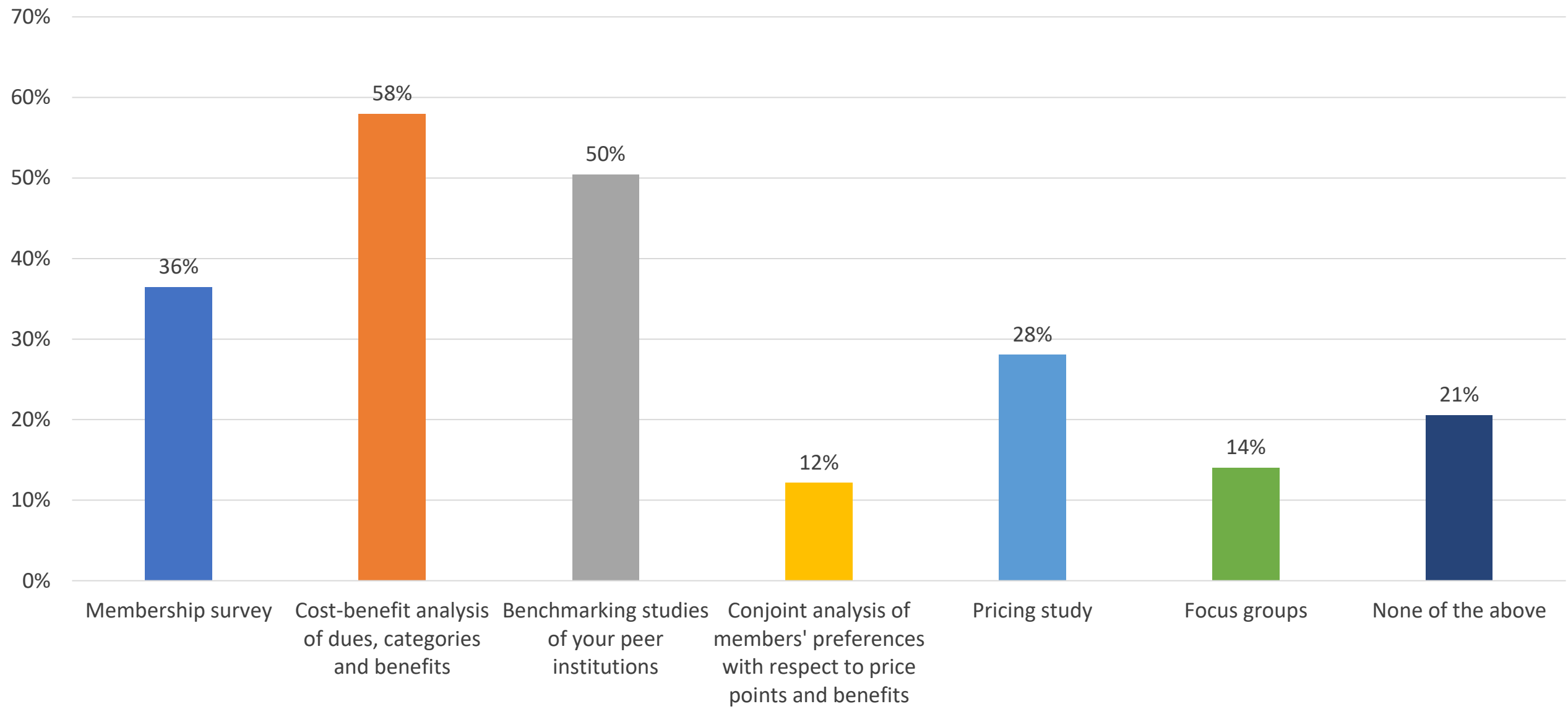


In changing dues, categories and/or benefits, how well were the changes received by your members?





Before making changes to dues, categories and/or benefits, did you use any of the following tools or research (check all that apply)?



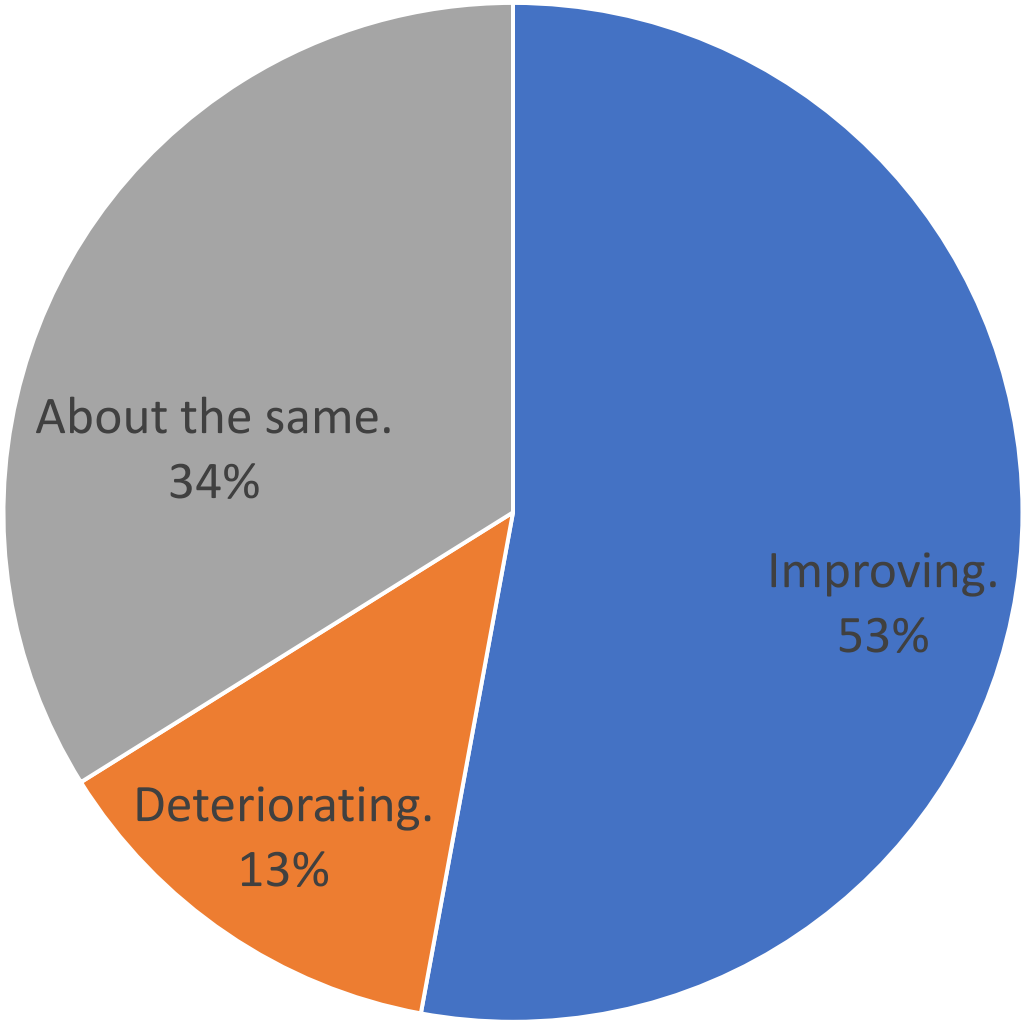


Membership Forward

Pulse 2022 Mid-Year Data

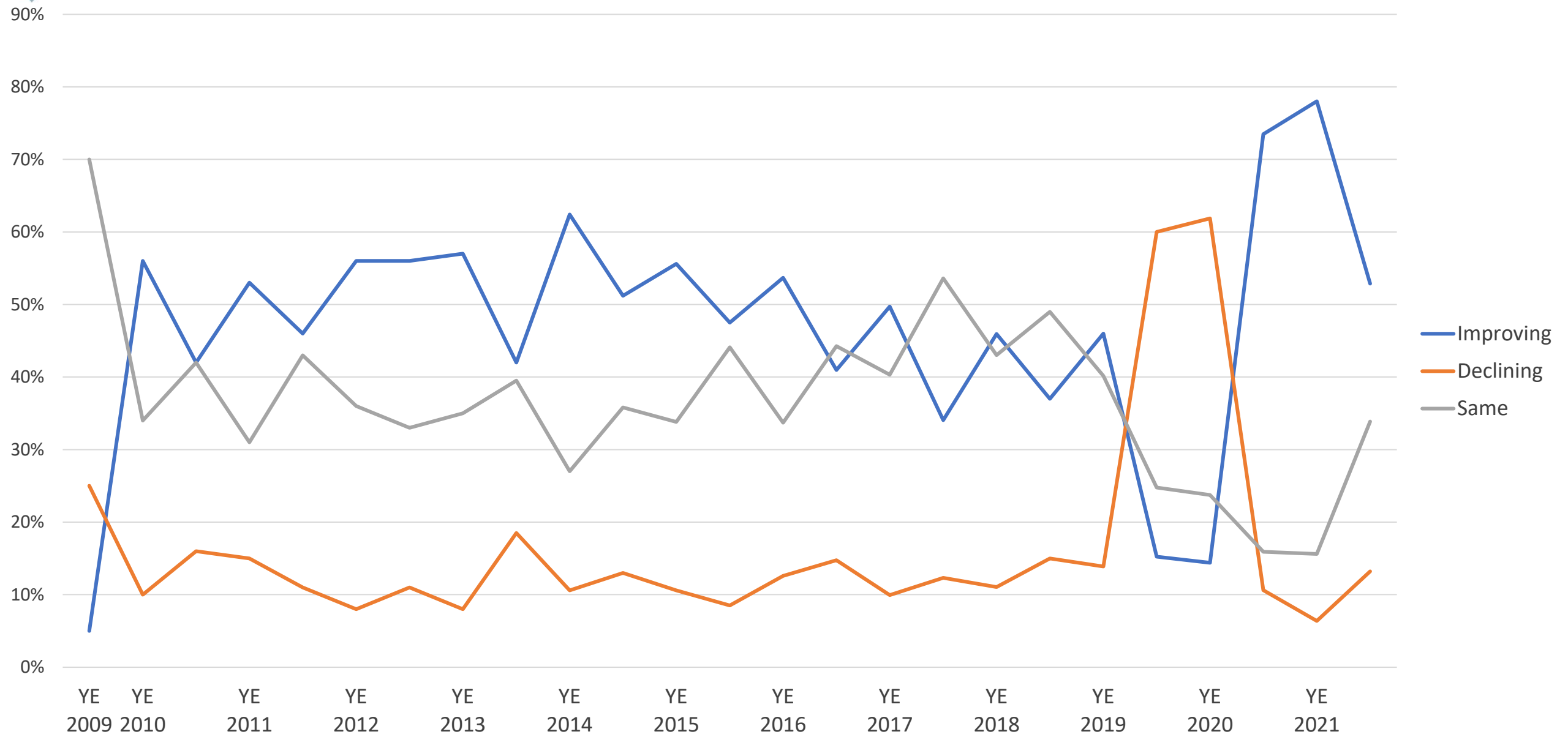


In your professional opinion, comparing 2022 to 2021, the membership climate is...





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



Silver Lining from Covid-19 Pandemic

- Importance of membership
 - Cashflow during closures and restricted or low visitation
 - Some members philanthropic
 - Some members more mission-oriented and less transactional than we thought
- Digital usage increase
- Increased communications
- Increased usage of digital cards
- Increase in auto-renewals
- Email collection from reserved ticketing



Going Forward ...

- 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



Questions?

Stay in Touch!



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Take our 2022
Year-End
Survey



We'll also be emailing
out the link soon!