



**MEMBERSHIP
CONSULTANTS**
AN OSG COMPANY

Pulse of Membership Survey Recap

2021 YEAR-END SURVEY RESULTS

AND

MEMBERSHIP TRENDS





Introductions



- Dana Hines
 - Membership Strategist, New Business Development



- 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!

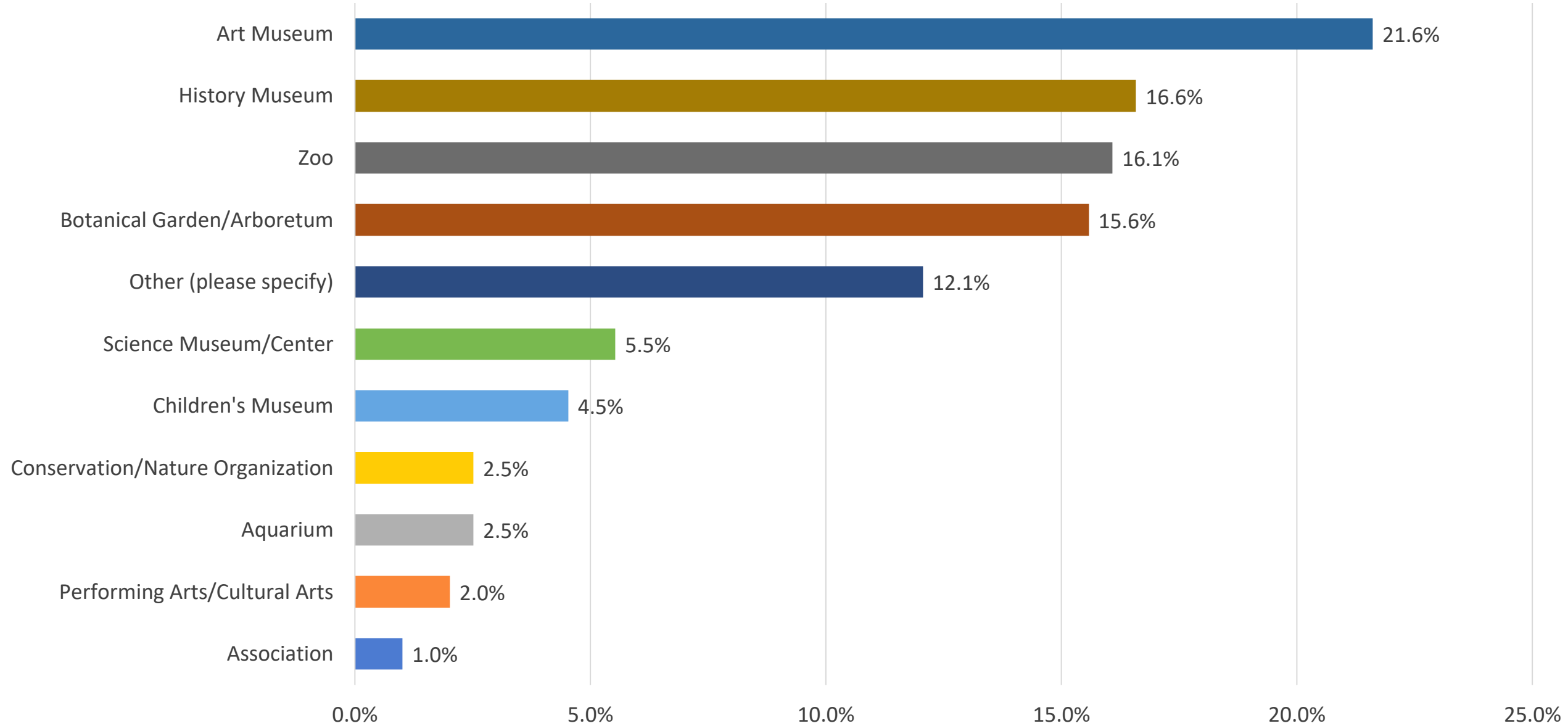


Demographics

Pulse 2021 Year-End Data

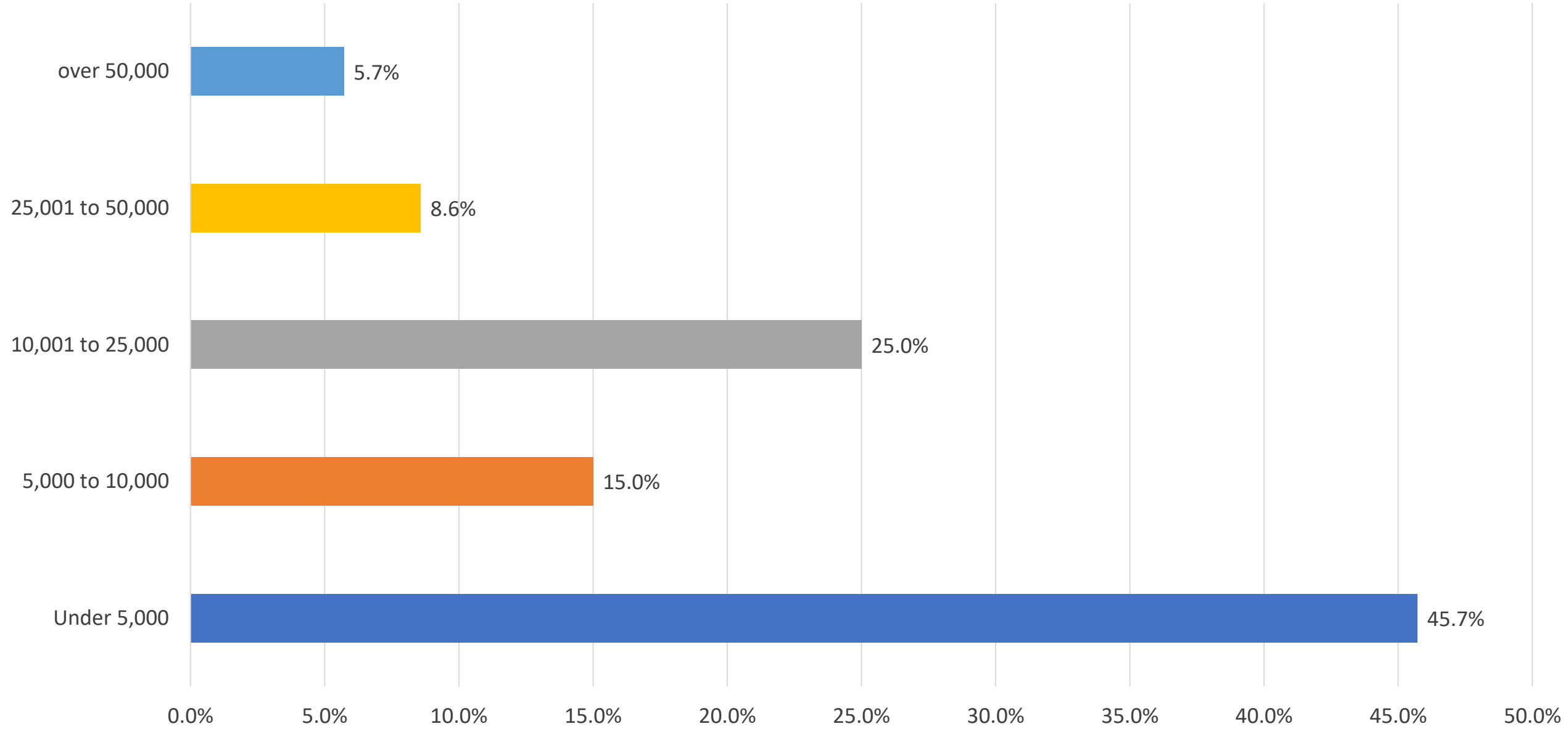


What type of organization does your membership serve?





How many members does your organization have?





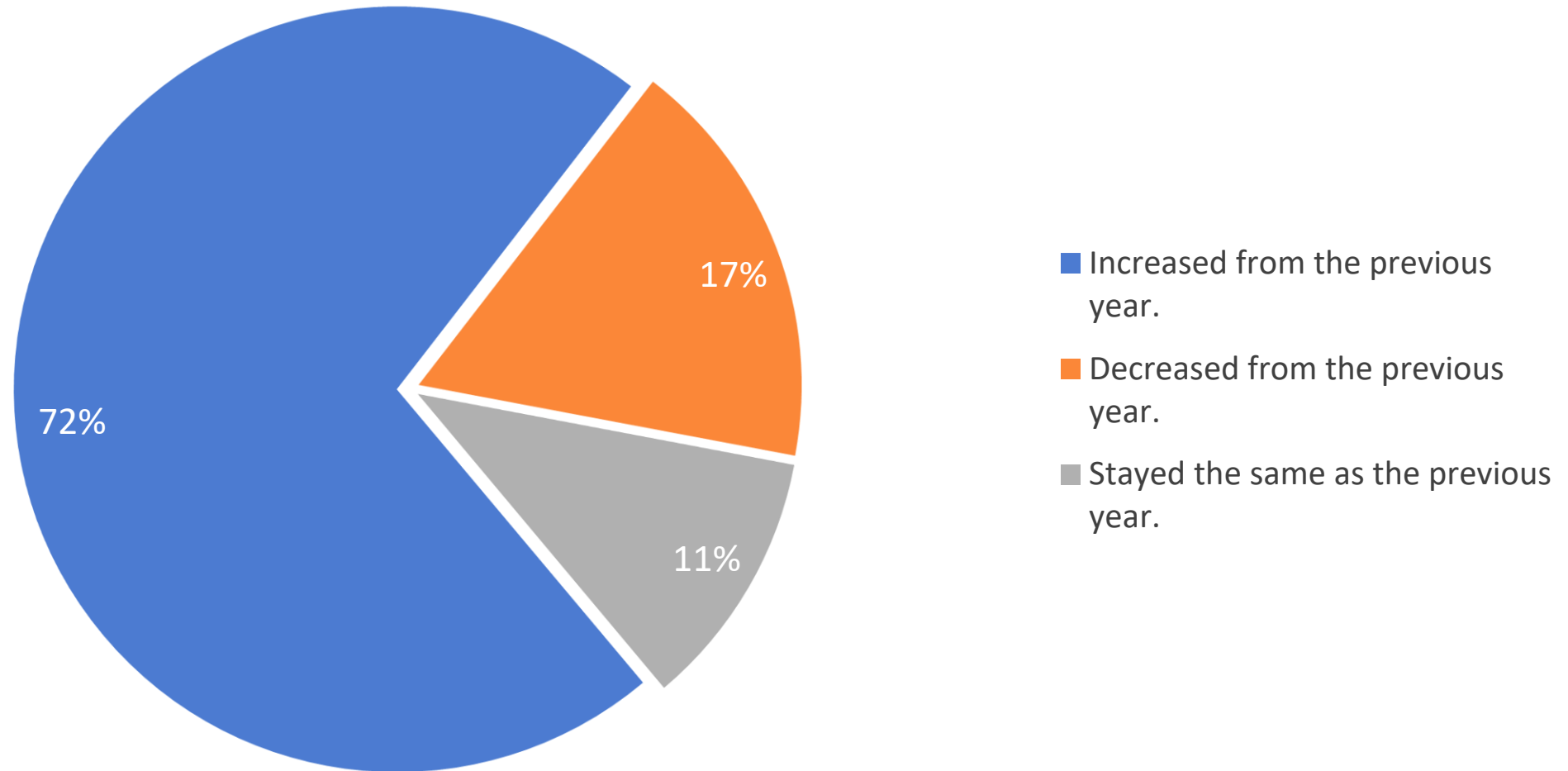
Trends

Pulse 2021 Year-End Data



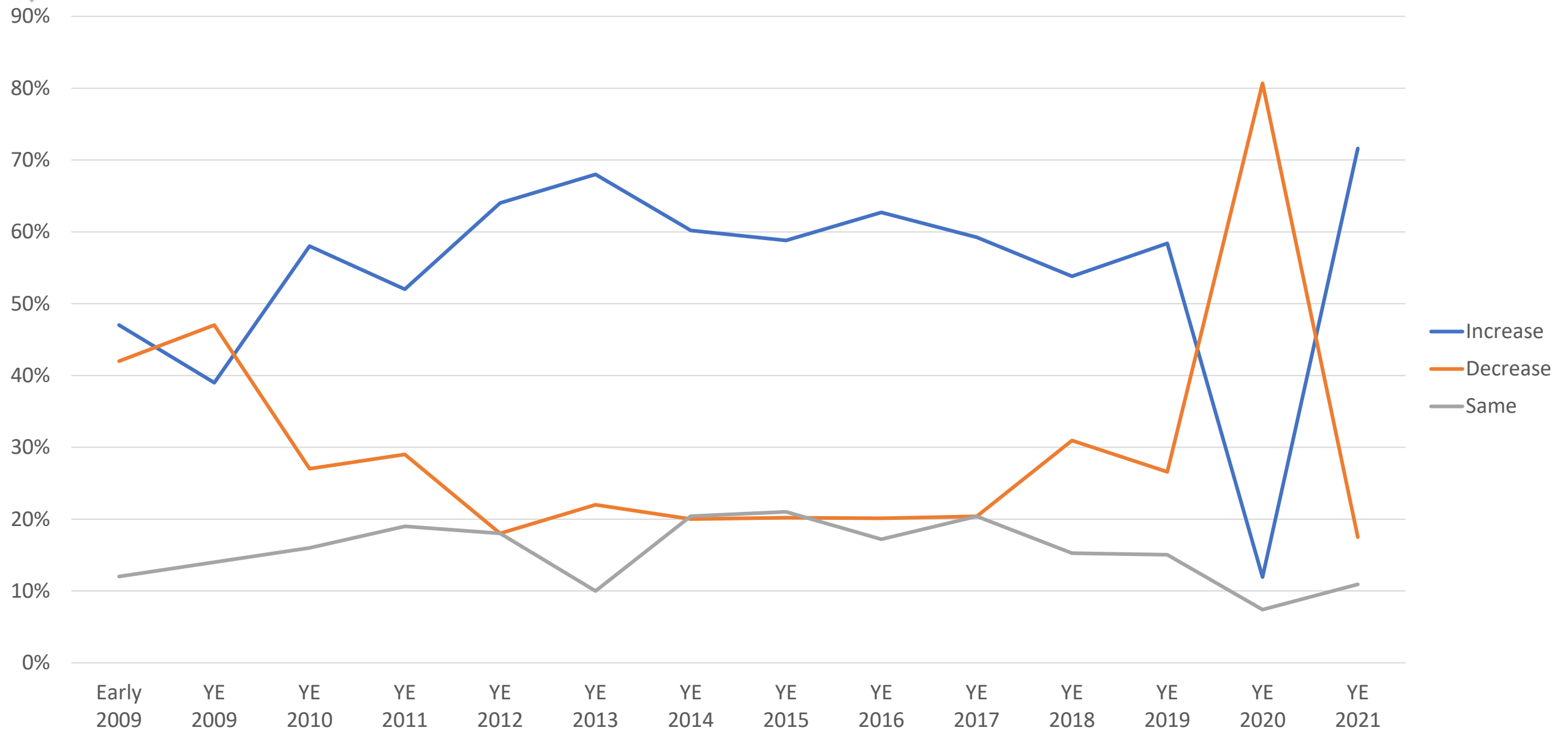


Comparing end-of-year membership totals for 2021 to end-of-year membership totals for 2020, your membership totals...



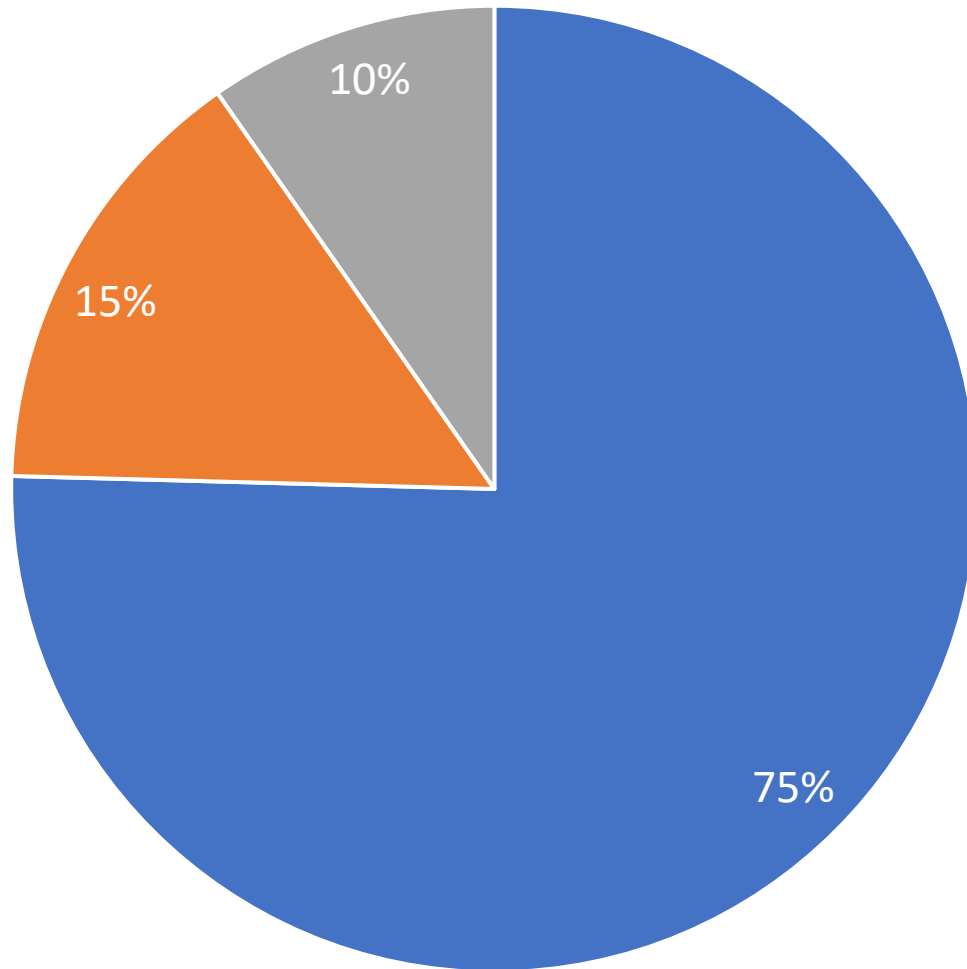


Membership Totals from Year to Year





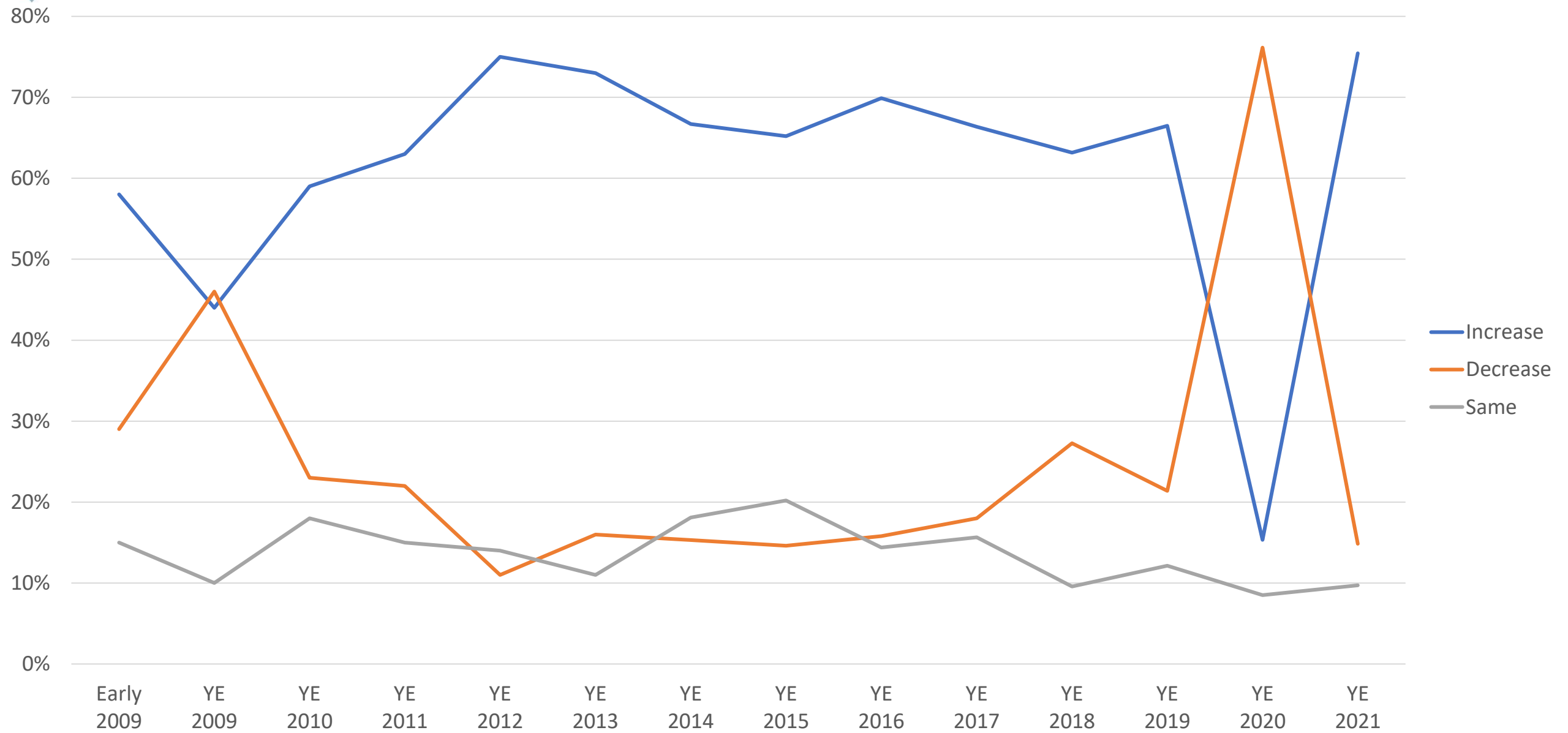
In comparing membership revenues at year-end 2021 to membership revenues at year-end 2020, your membership revenues...



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

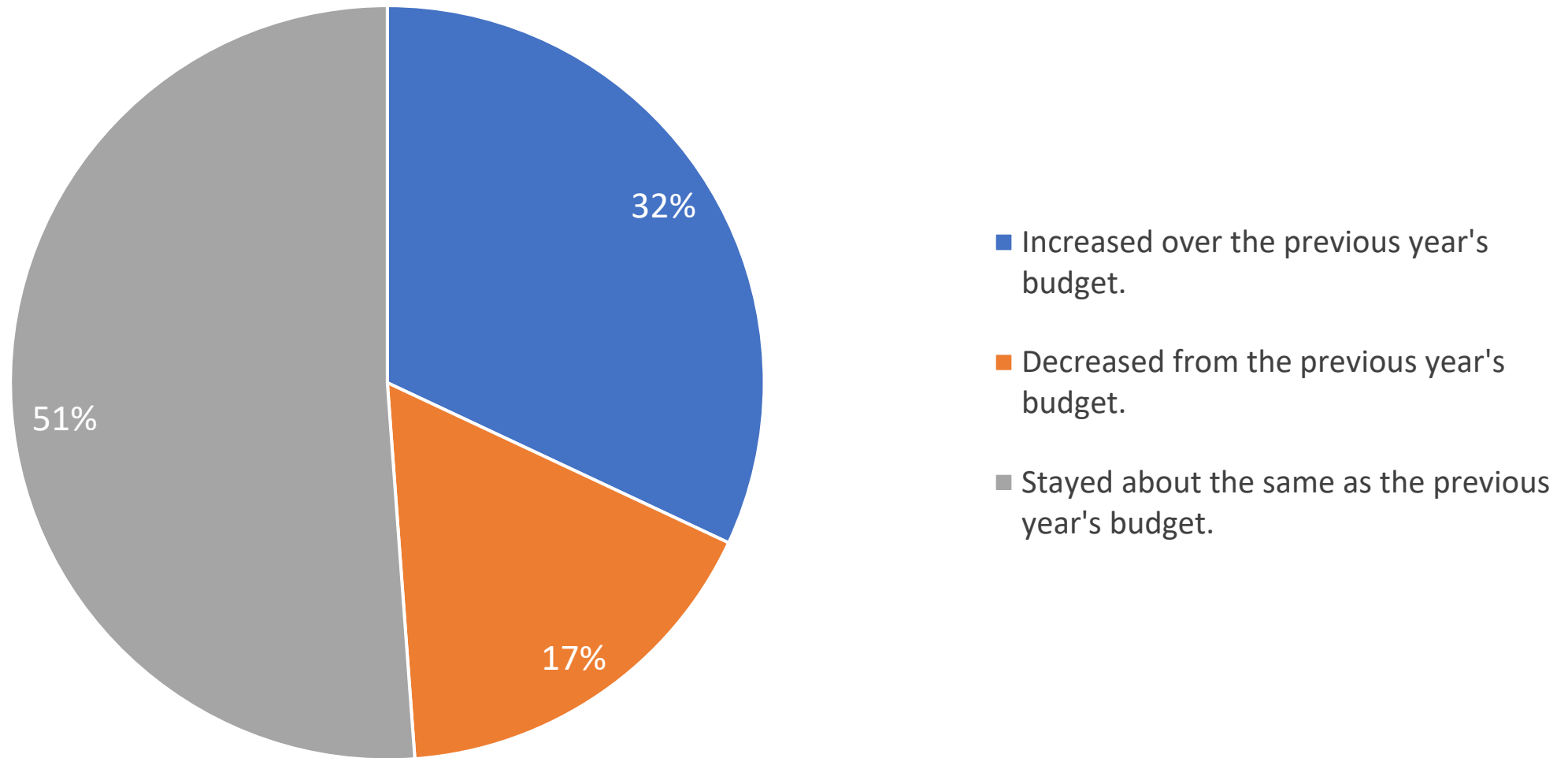


Membership Revenue



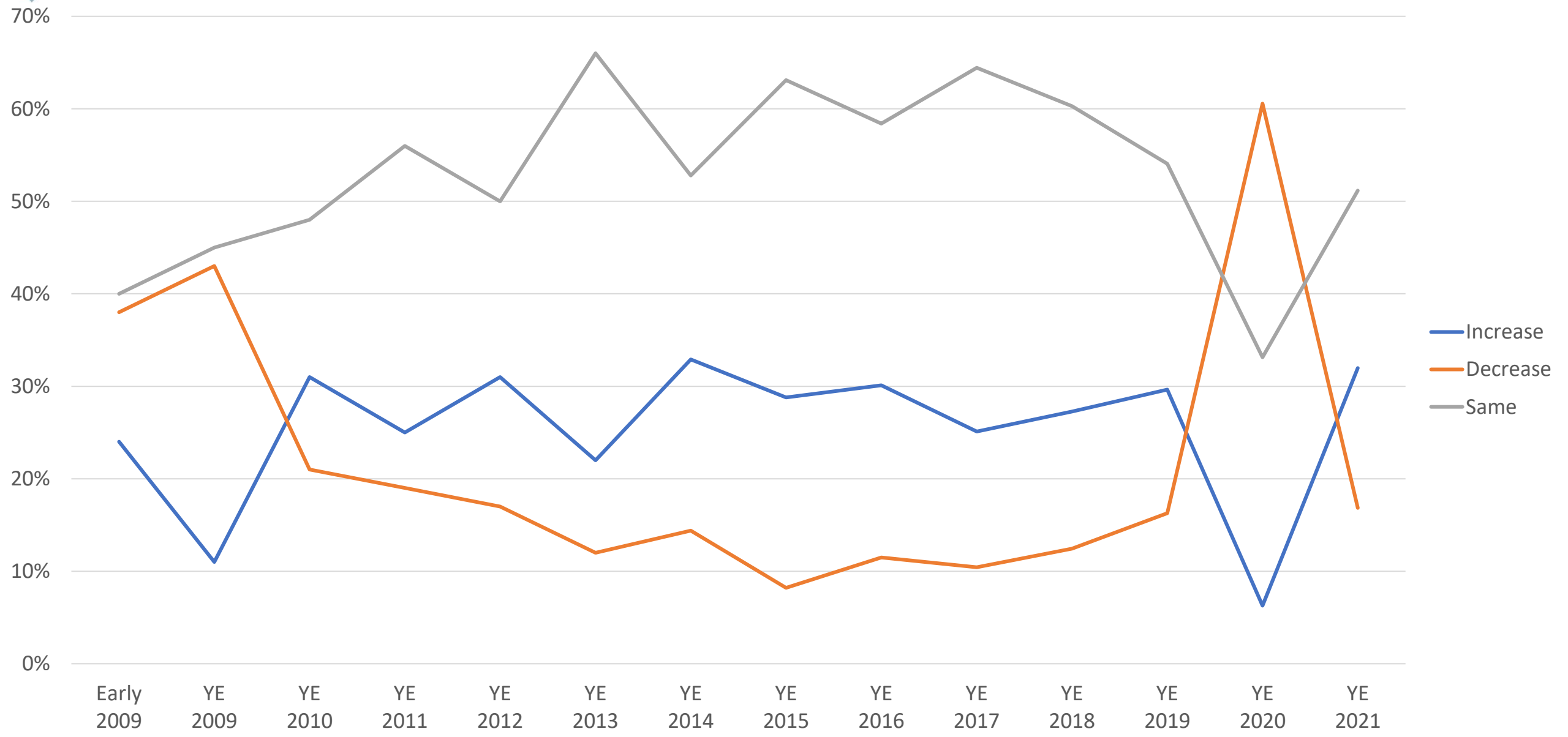


Comparing your membership expenditure budget for 2021 to your membership expenditure budget from 2020, your membership expenditure budget...



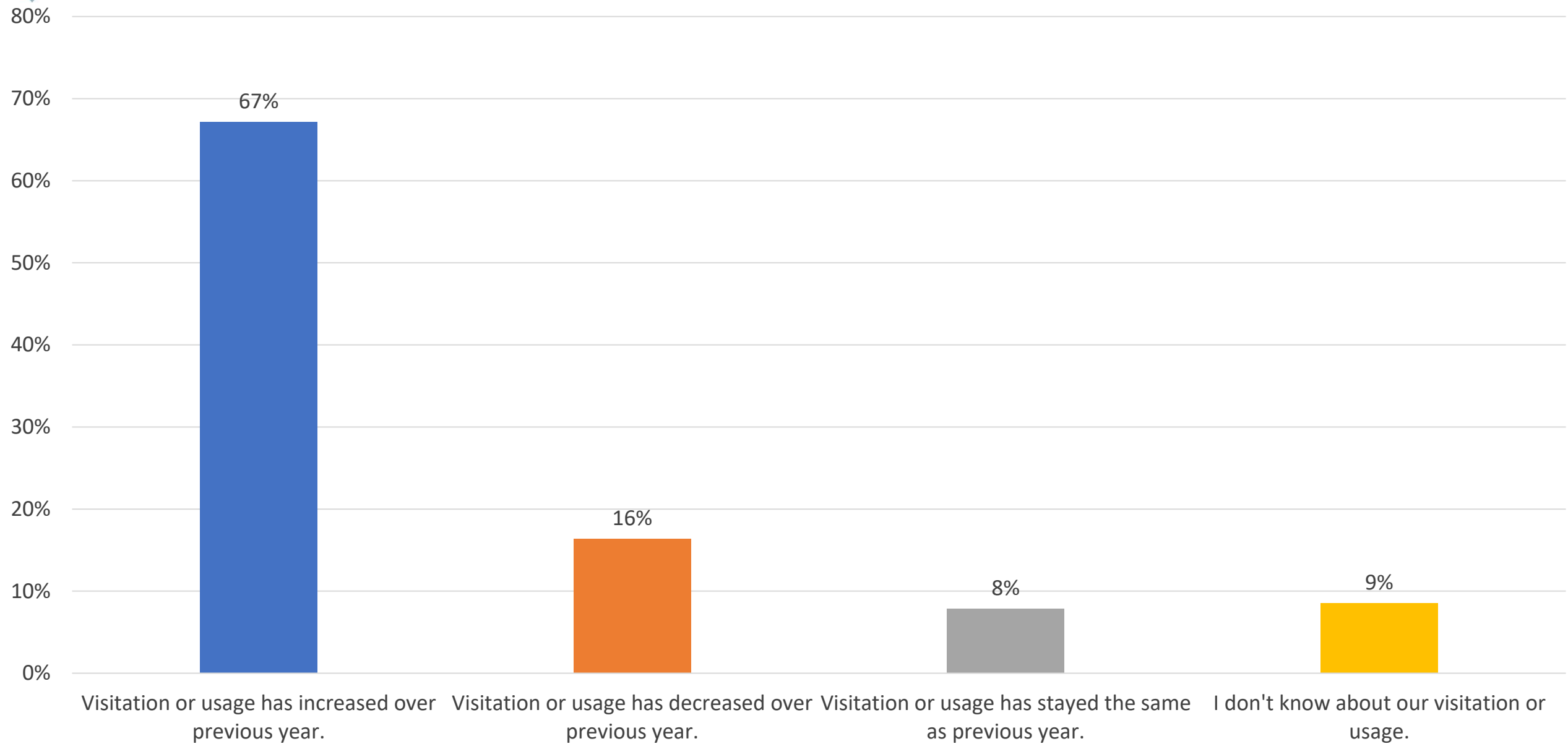


Membership Budget



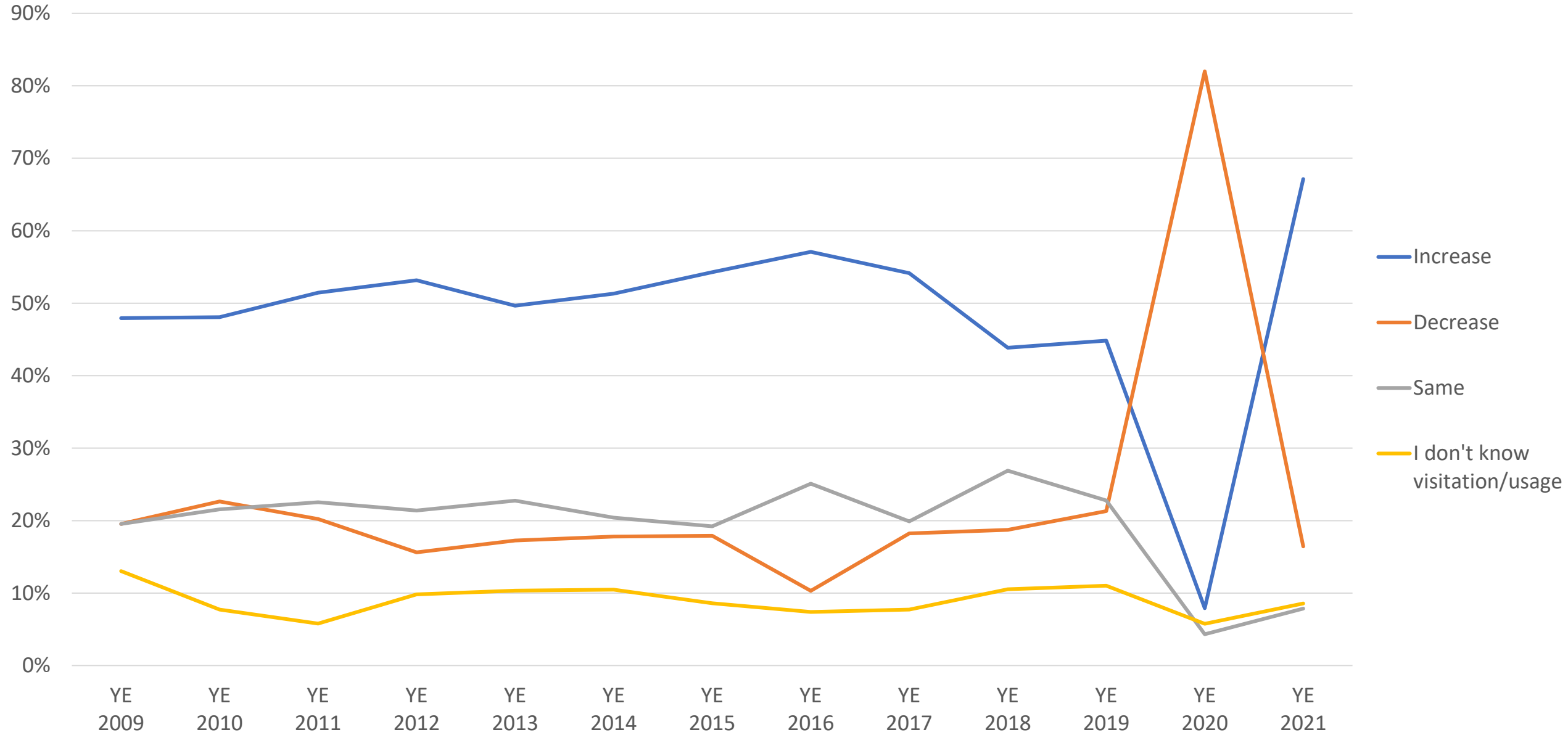


Please describe your organization's visitation or usage patterns in 2021.





Visitation or Usage





Recap

Year-End 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

Year-End 2020

- Membership Totals
 - 12% said increase
 - 7% stayed the same
 - 81% decrease
- Revenues
 - 15% said increase
 - 9% stayed the same
 - 76% decrease
- Expenditure Budgets
 - 6% said increase
 - 33% stayed the same
 - 61% decrease
- Visitation/Usage
 - 8% said increase
 - 4% stayed the same
 - 82% decrease

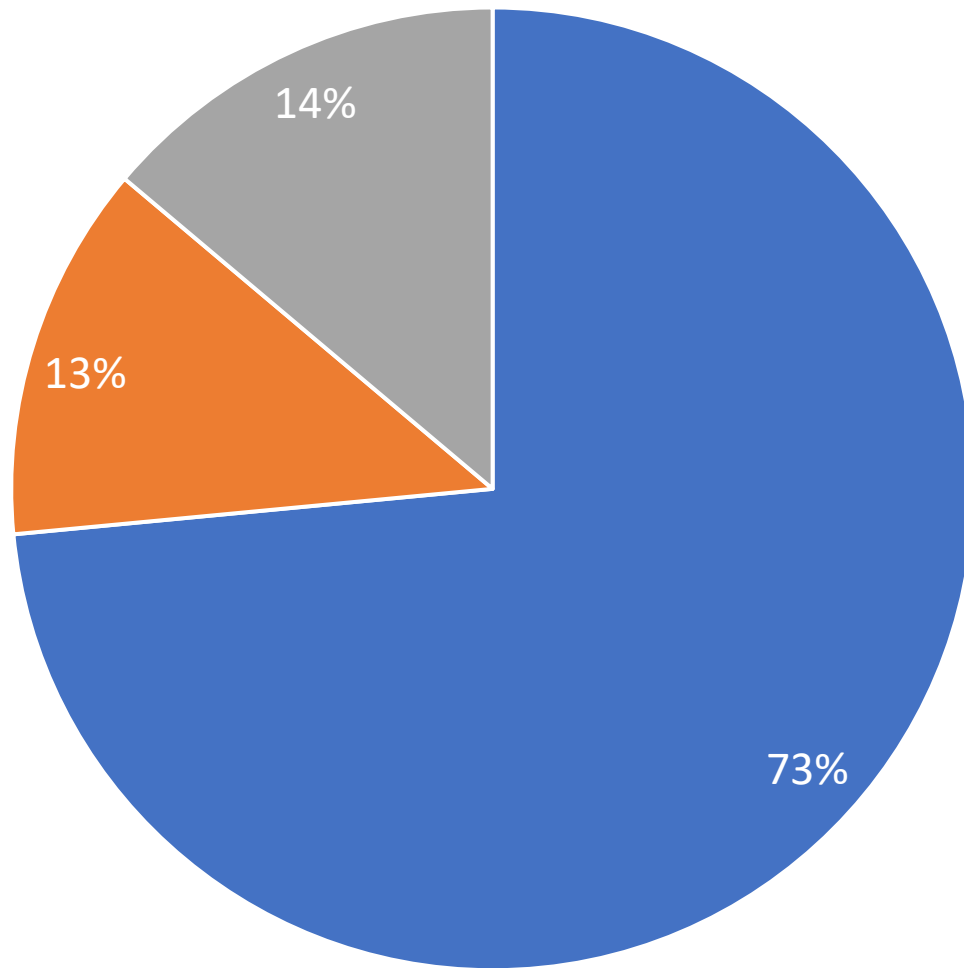


Trends – Acquisition

Pulse 2021 Year-End Data



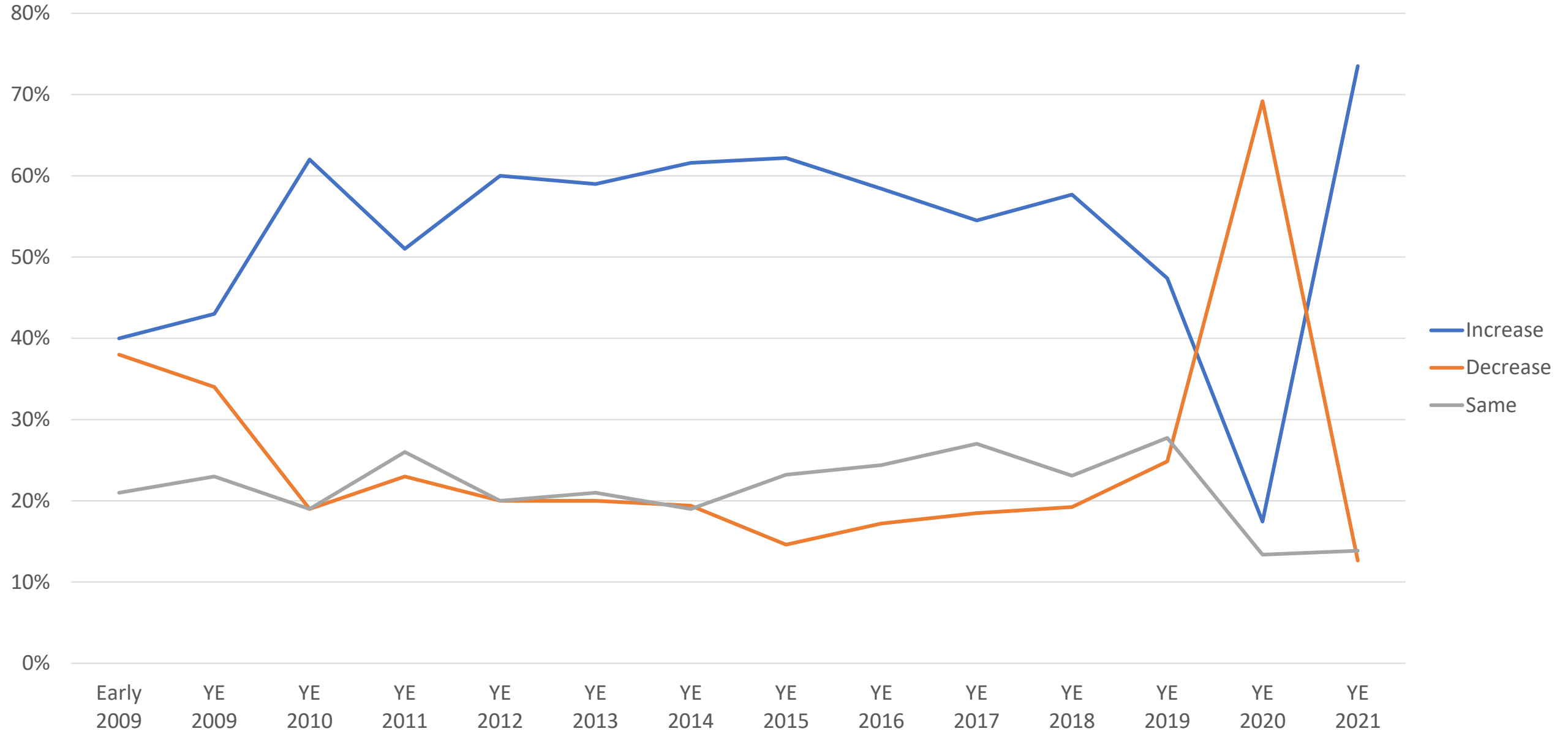
Comparing new members acquired in 2021 to new members acquired in 2020, your membership acquisition efforts have...



- 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.

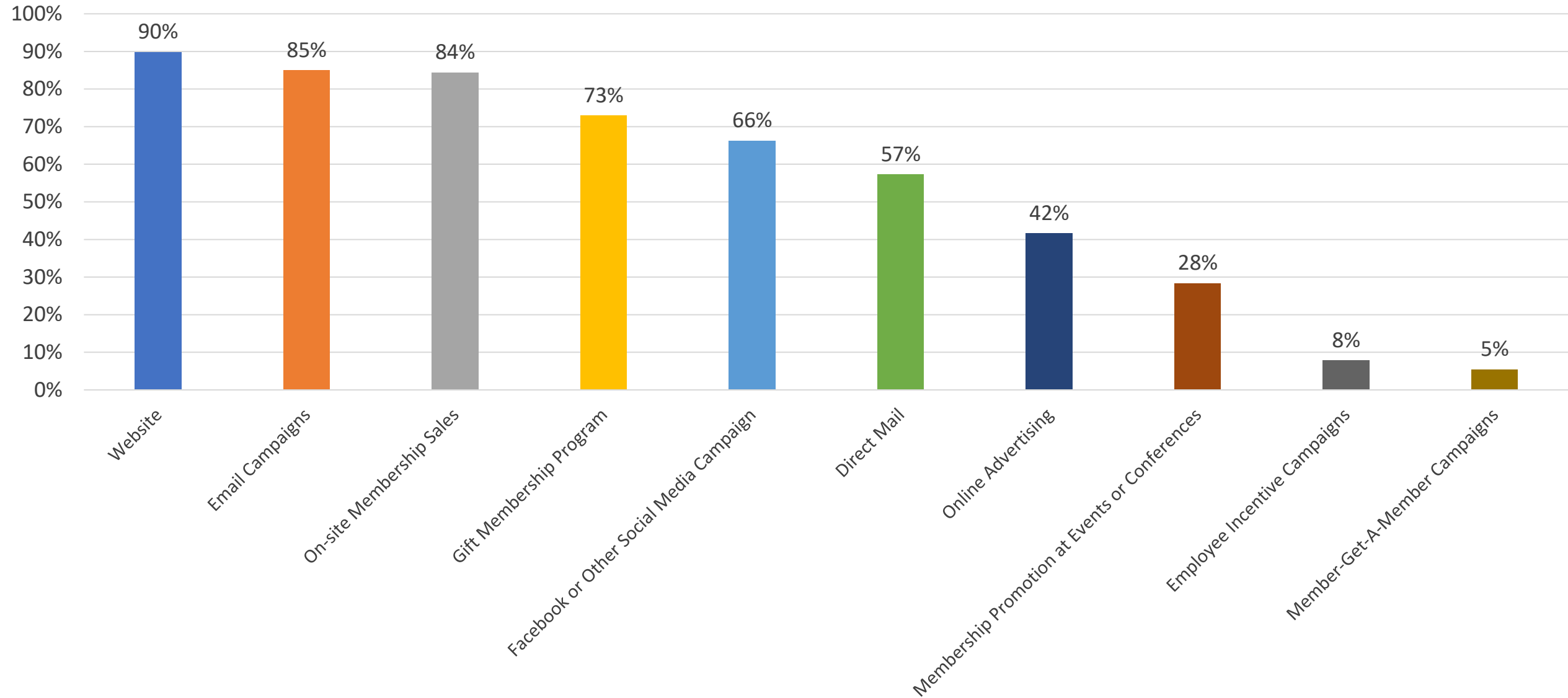


New Members Acquired



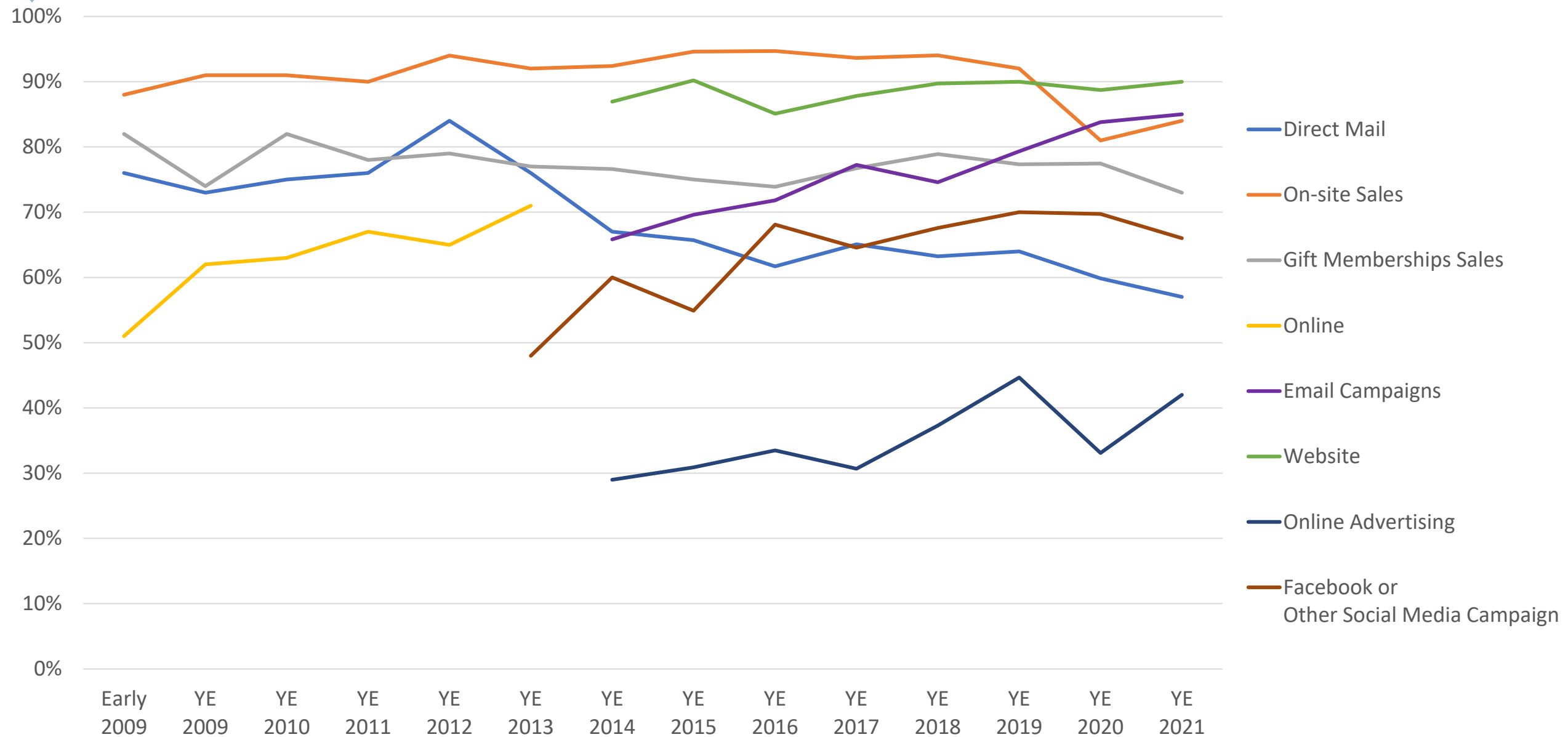


Membership Acquisition: Please select all of the means of acquiring new members that your program utilizes.





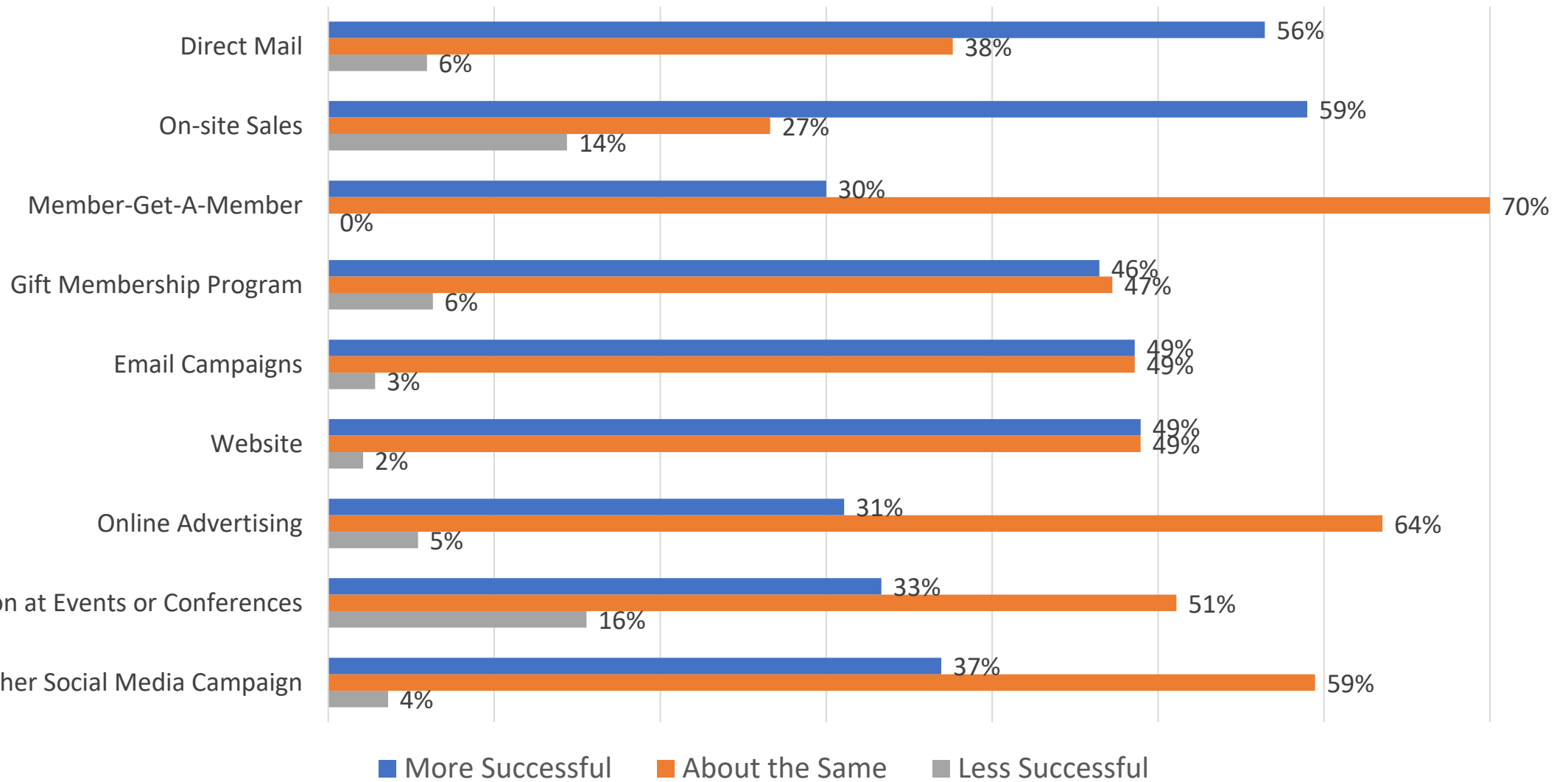
Acquisition Sources Used





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.

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





Recap – Acquisition Methods

Year-End 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

Year-End 2020

- New Members
 - 17% said increase
 - 69% decrease
 - 13% staying the same
- Top 5 Acquisition Methods
 1. Website (*on-site sales was #1 pre-Covid*)
 2. Email Campaigns
 3. On-Site Membership Sales
 4. Gift Membership Program
 5. Facebook or Other Social Media Campaign

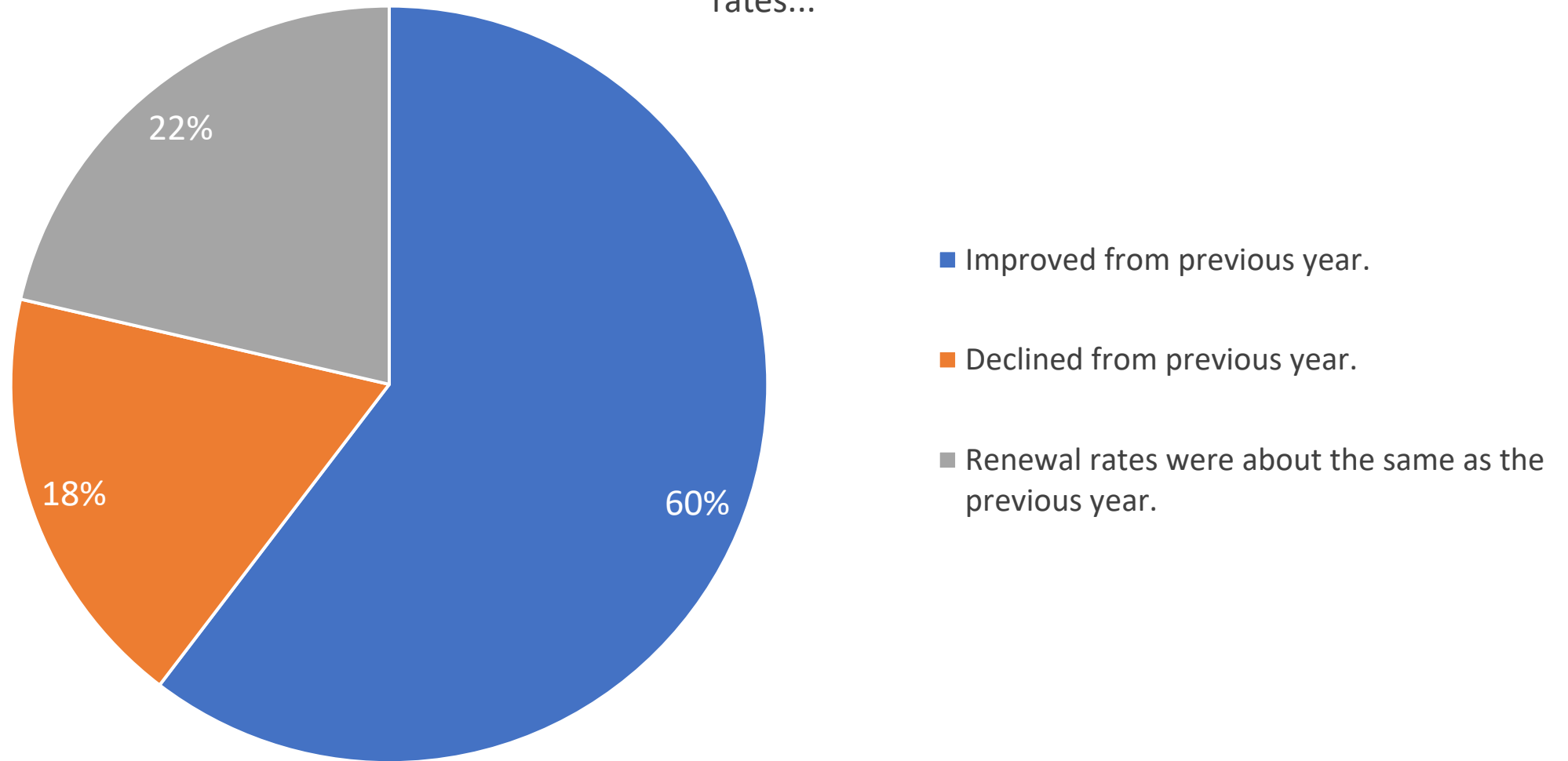


Trends – Renewals

Pulse 2021 Year-End Data

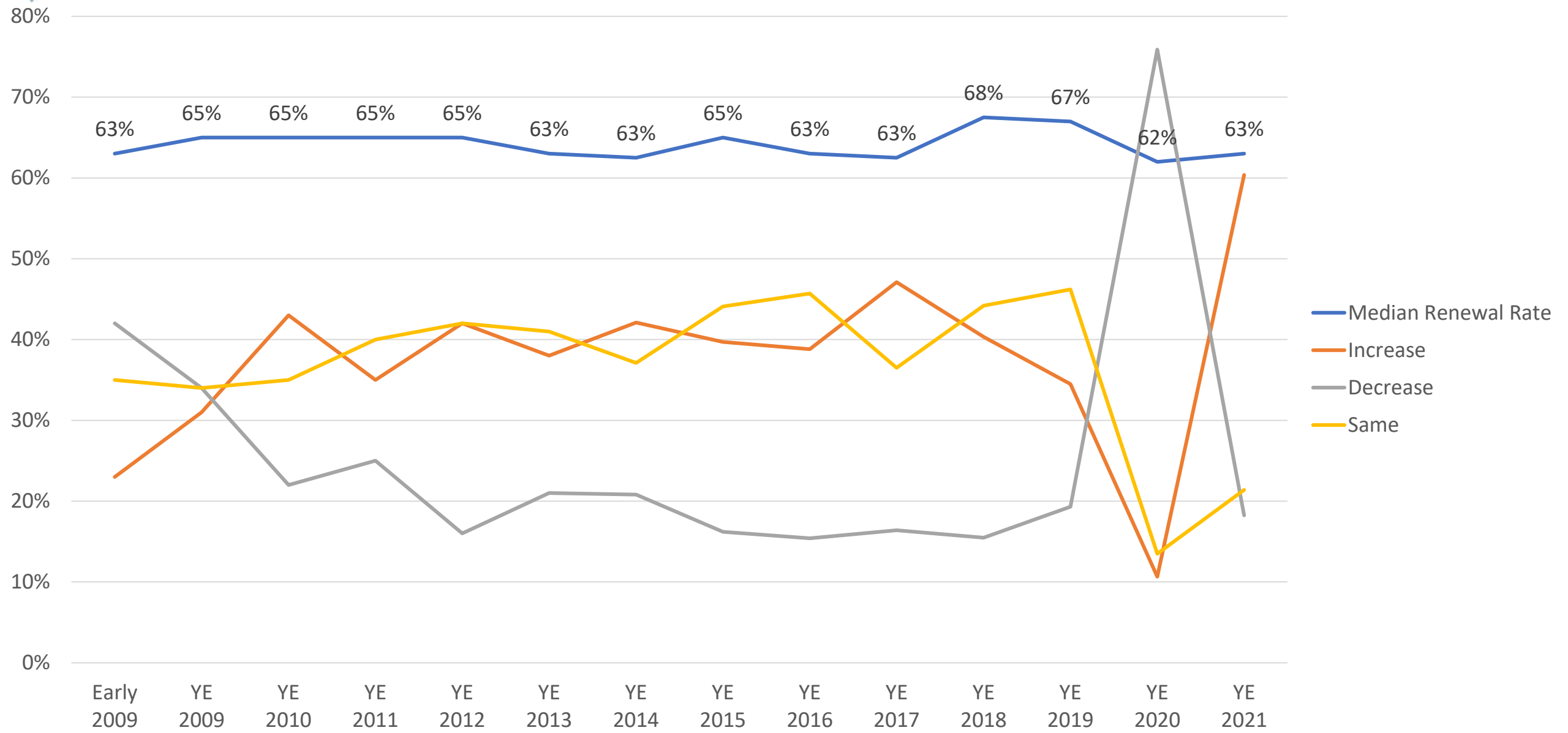


Comparing membership renewal rates in 2021 compared to those in 2020, would you say that renewal rates...



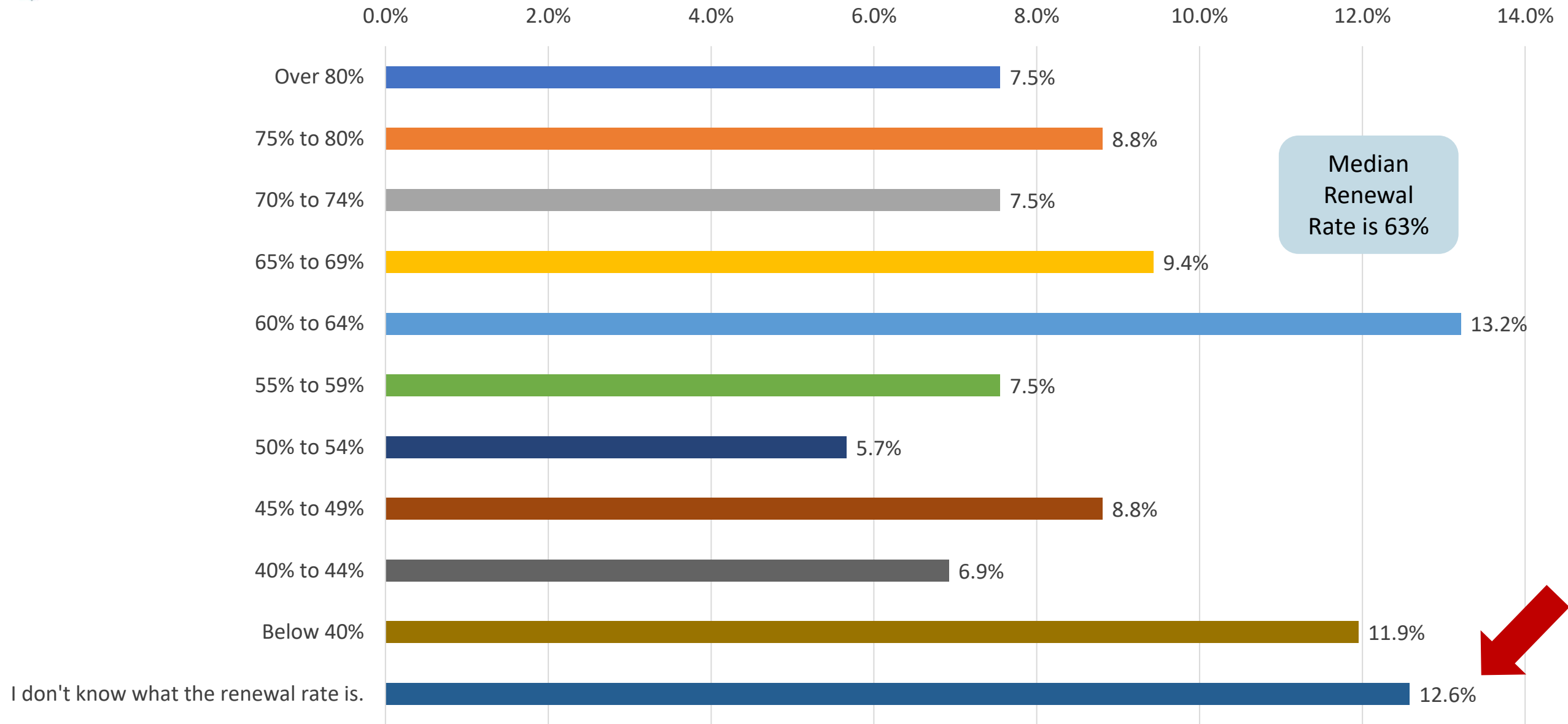


Renewal Rates





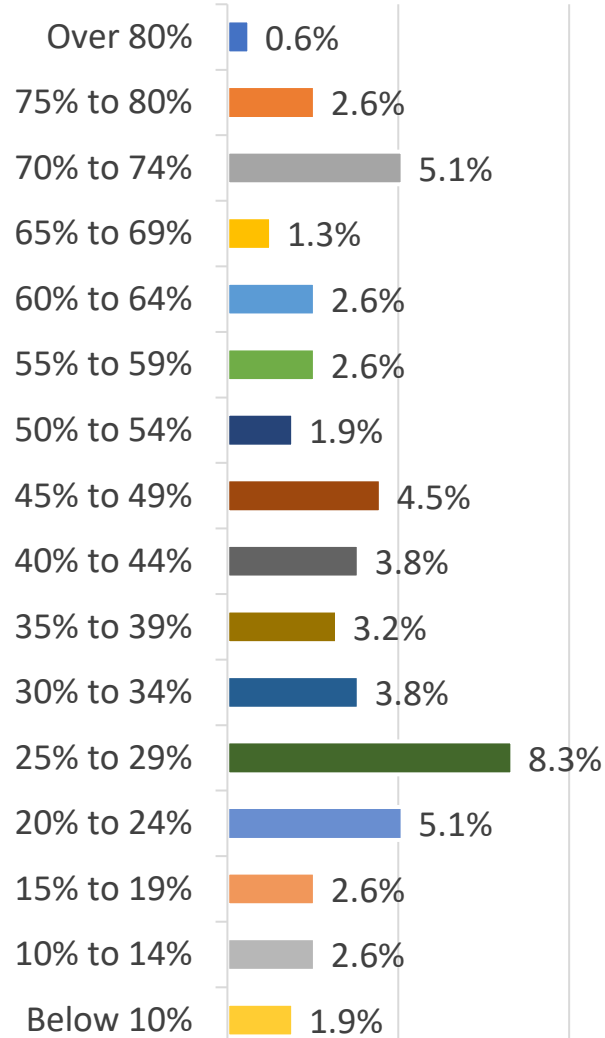
What is your membership renewal rate?





What is your first-year member renewal rate?

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



Median First-Year Renewal Rate is 37%

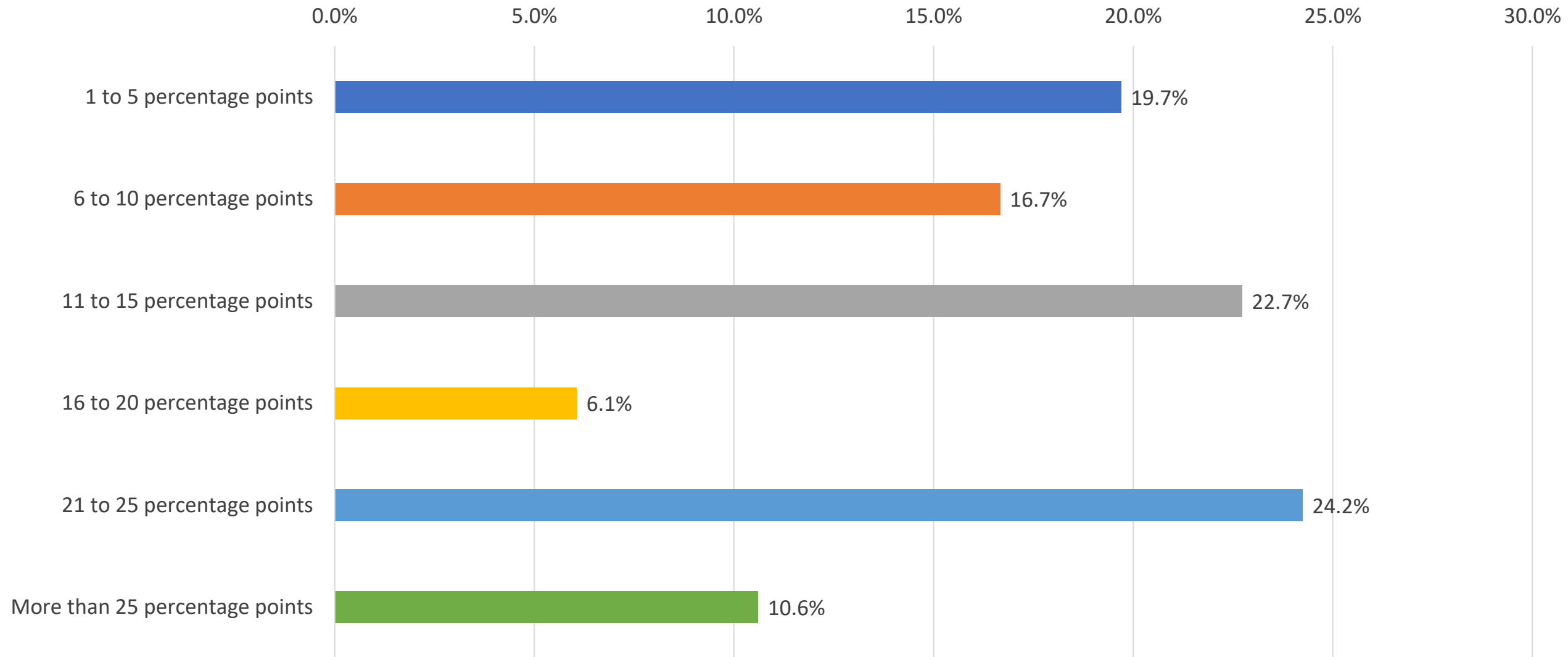


I don't know what the first-year renewal rate is.

47.4%



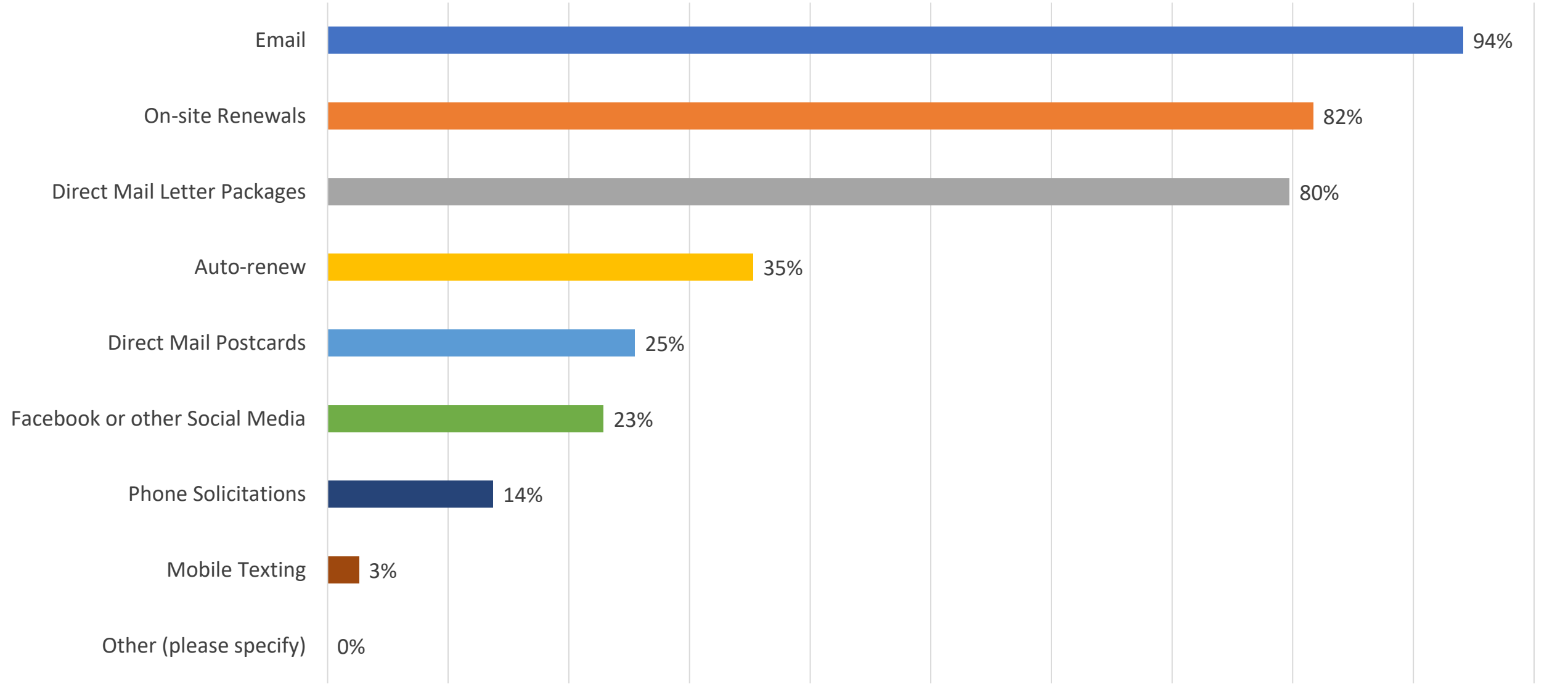
If you reported a decline in renewal rates due to the Covid-19 pandemic and closures, how many percentage points did your renewal rate decline? (E.g. a decrease from 60% renewal rate to a 55% renewal rate is a decline of 5 percentage points).





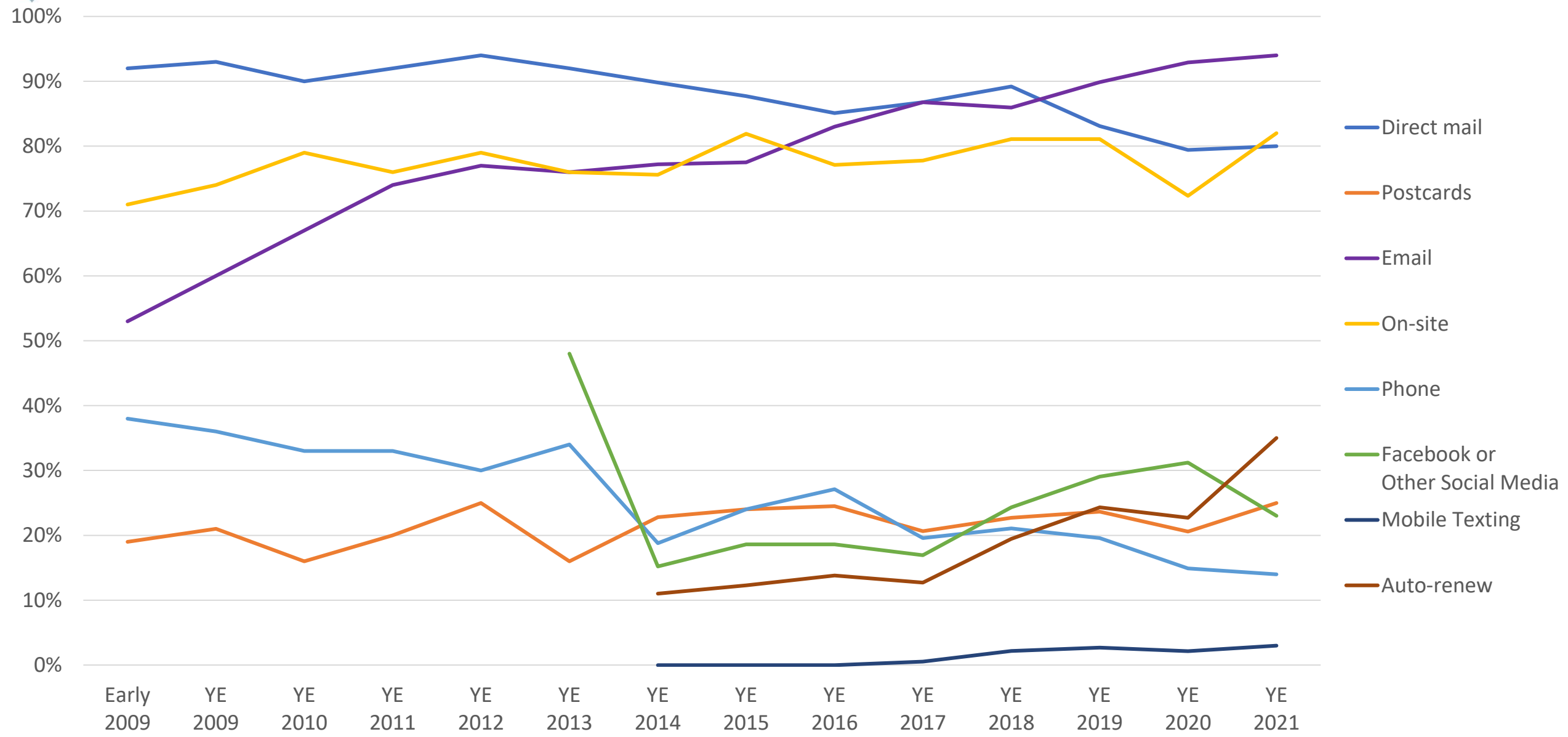
Please indicate the methods your program utilizes to drive membership renewals (check all that apply).

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





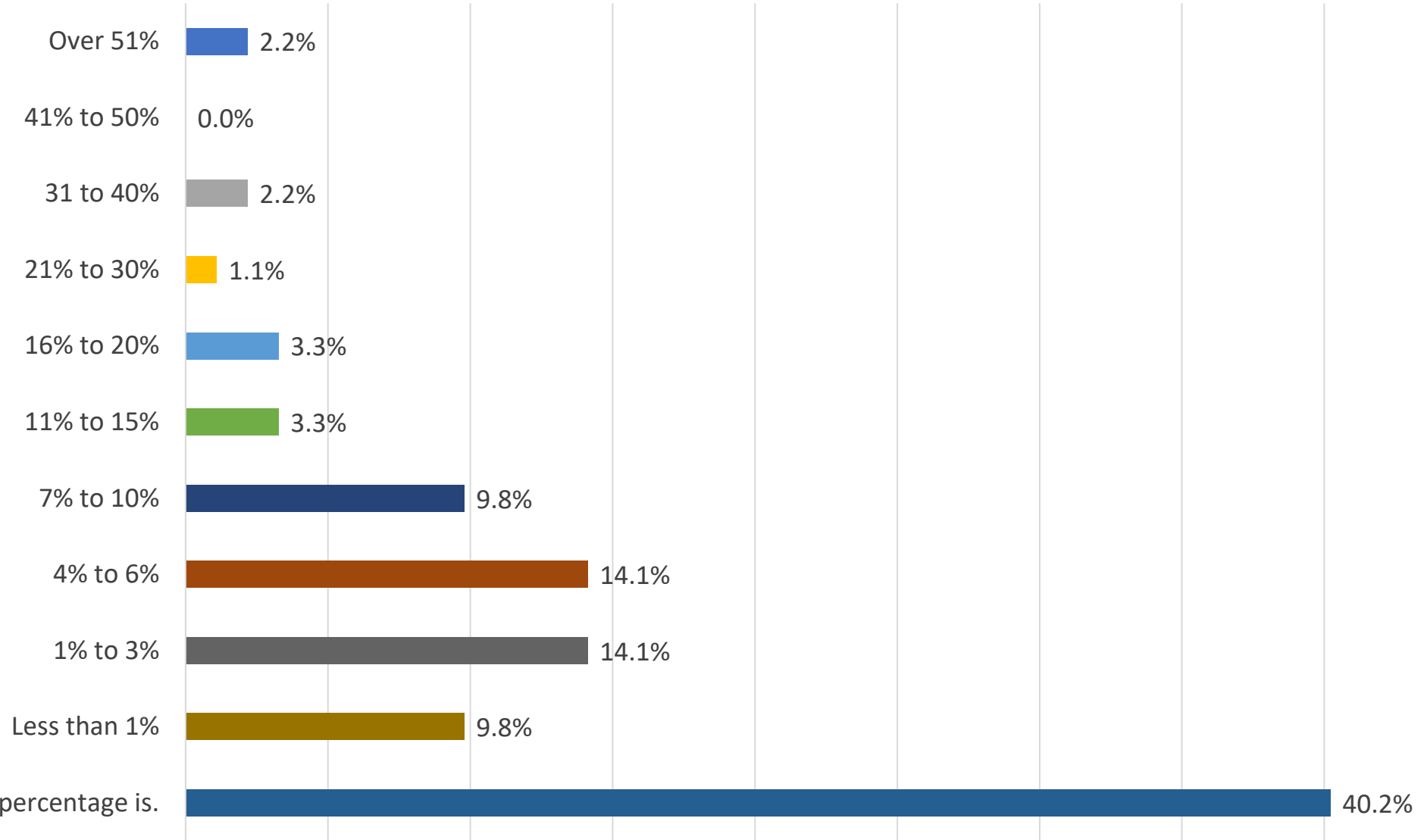
Methods Utilized to Drive Membership Renewals





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

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



I don't know what our auto-renew percentage is.

40.2%



Recap – Renewals

Year-End 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

Year-End 2020

- Renewal Rates
 - 11% said increase
 - 76% reported a decrease
 - 13% staying the same
- Median Renewal Rate = 62%
 - Down 5 percentage points from 2019 year-end
 - 20.4% DO NOT KNOW Renewal Rate
- Median First-Year Renewal Rate = 45%
- Top 3 Renewal Methods
 1. Email
 2. Direct Mail letter packages
 3. On-Site Renewals

And **Auto-Renewal** is on the rise with 23% utilizing now

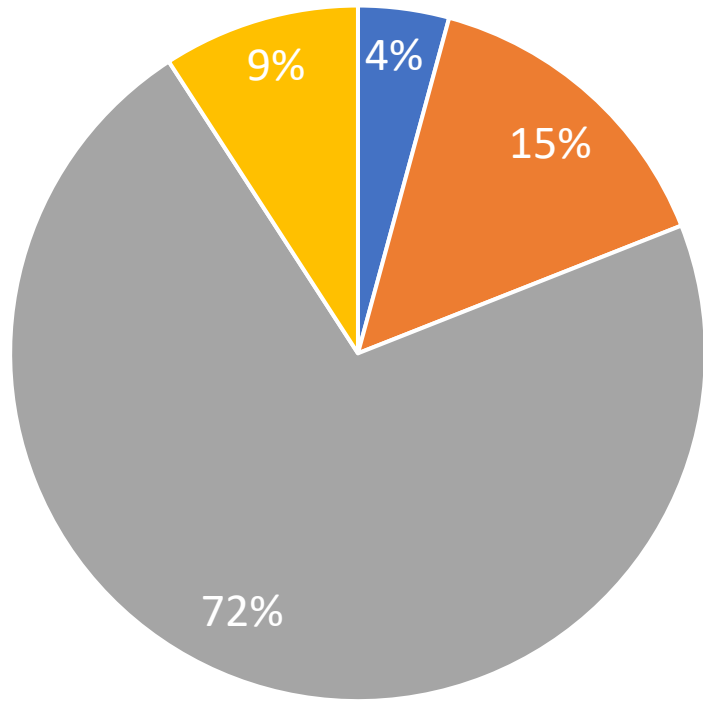


Digital, Online, Social Media and Mobile Marketing

Pulse 2021 Year-End Data

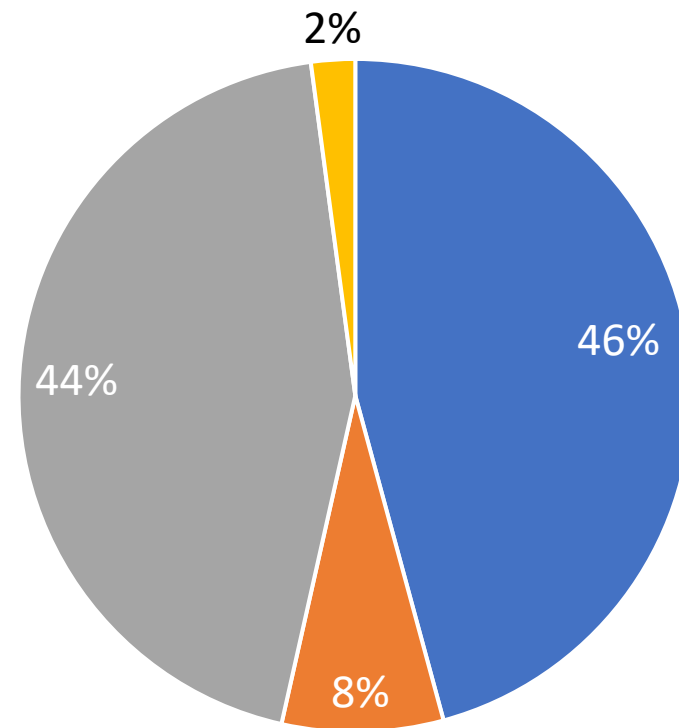


Who manages social media at your organization?



- 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.

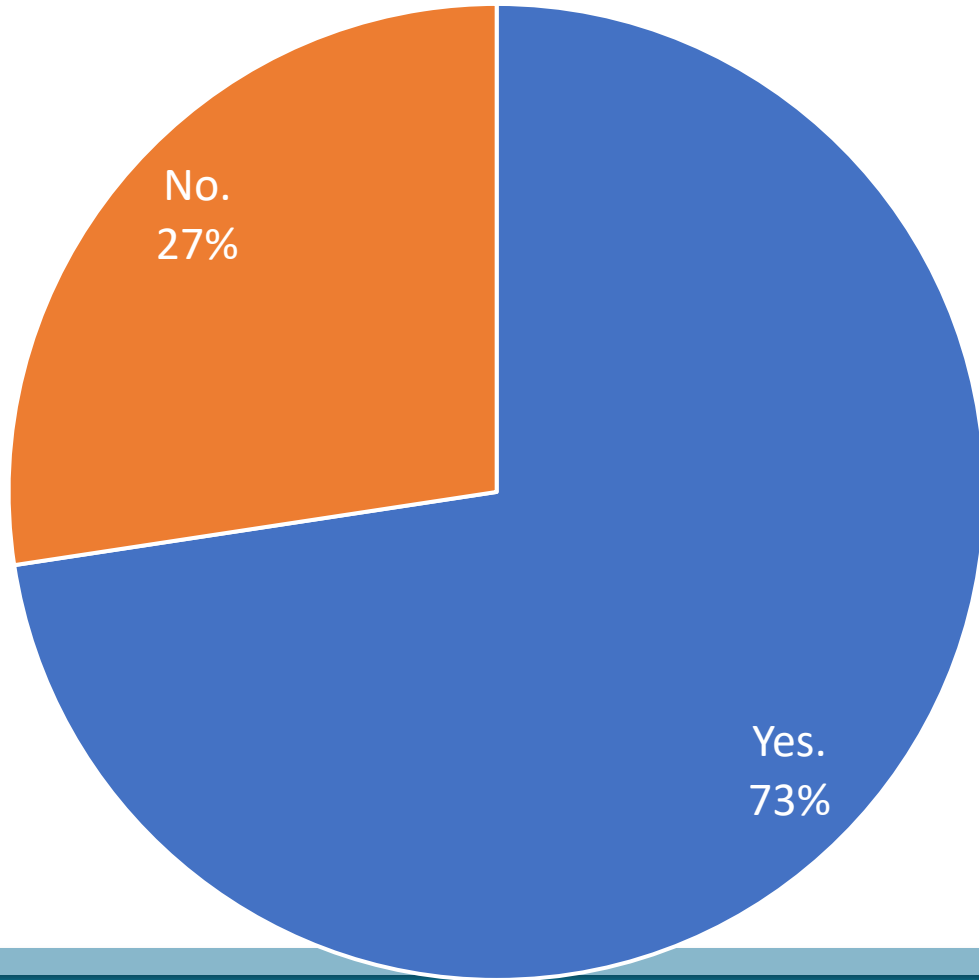
The person at my organization who manages social media is ...



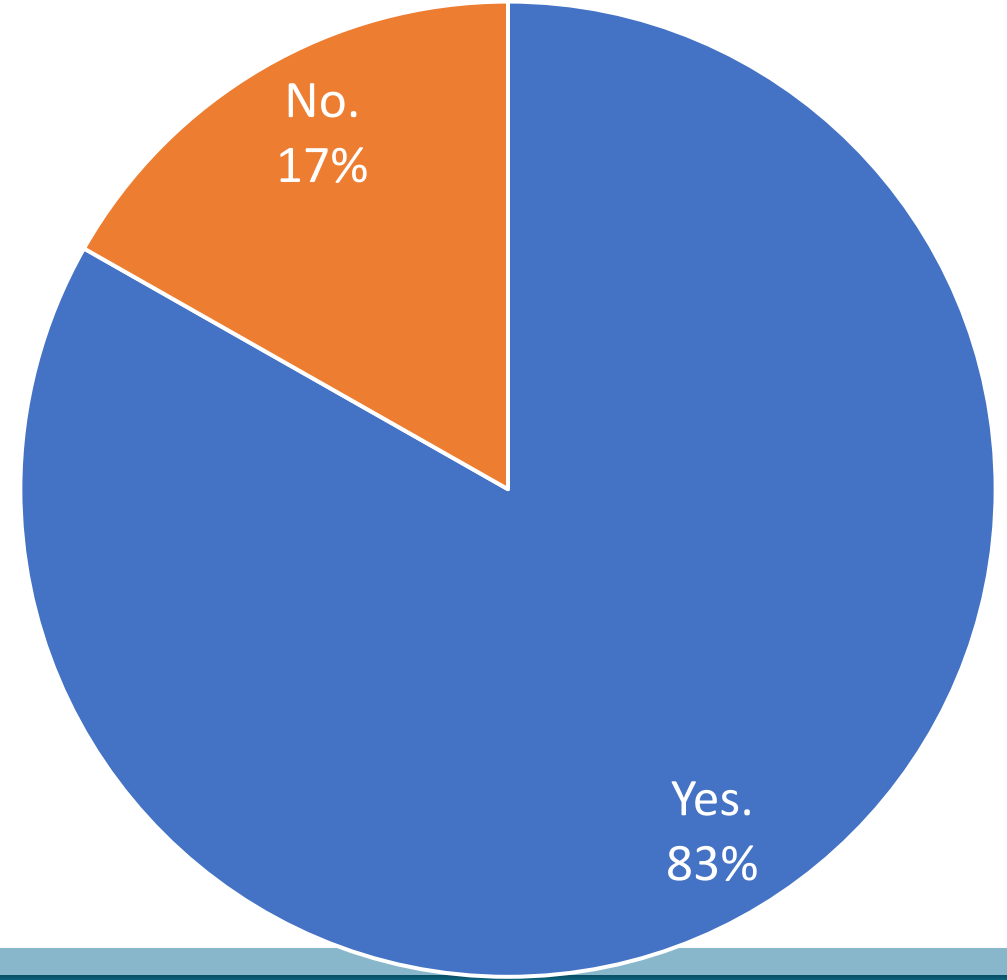
- A full-time social media position.
- A part-time social media position.
- Social media is an "add on" to someone's existing job.
- I don't know the status of social media management.



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

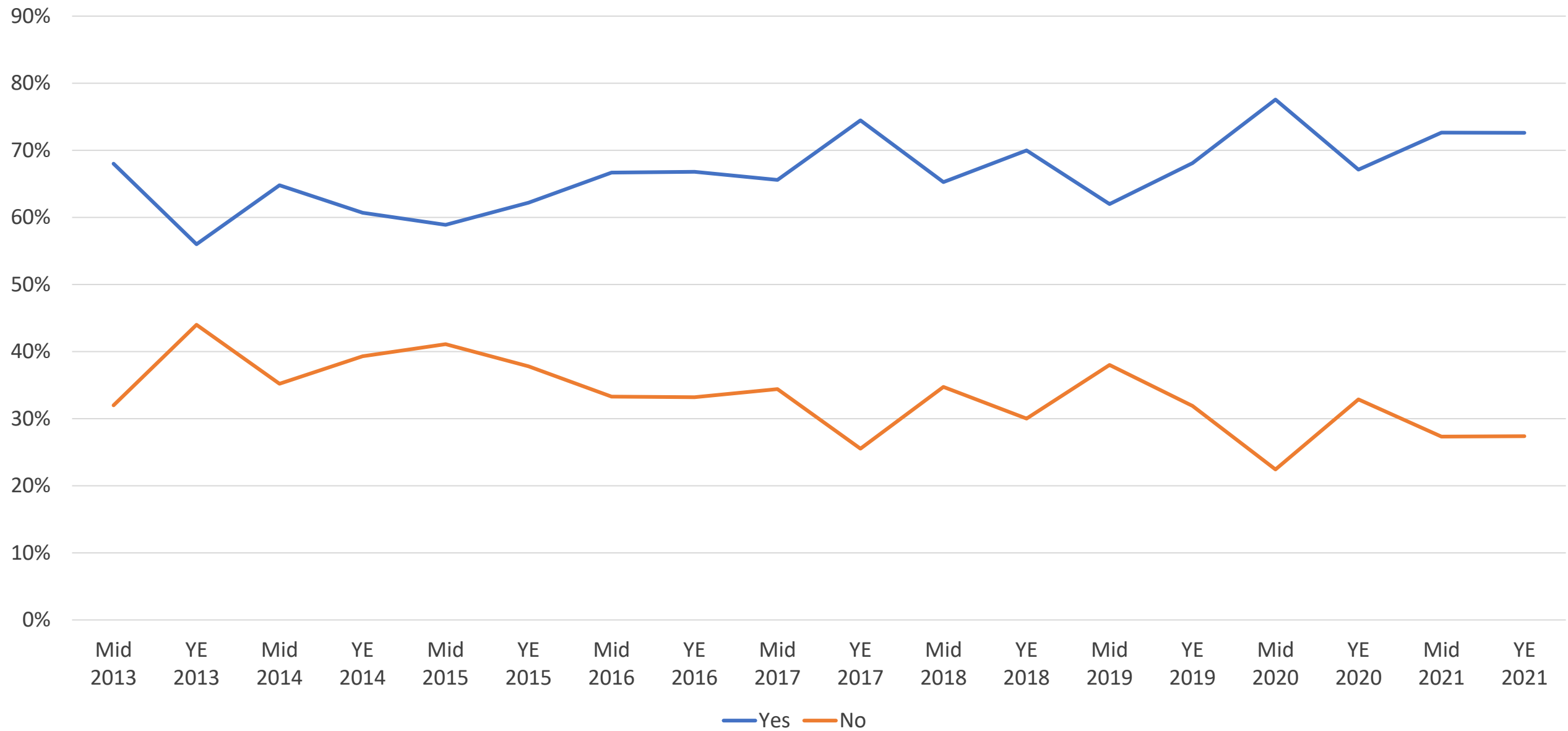


Does Membership have a voice in your organization's social media content management (e.g., membership messages, promotions, contests)?





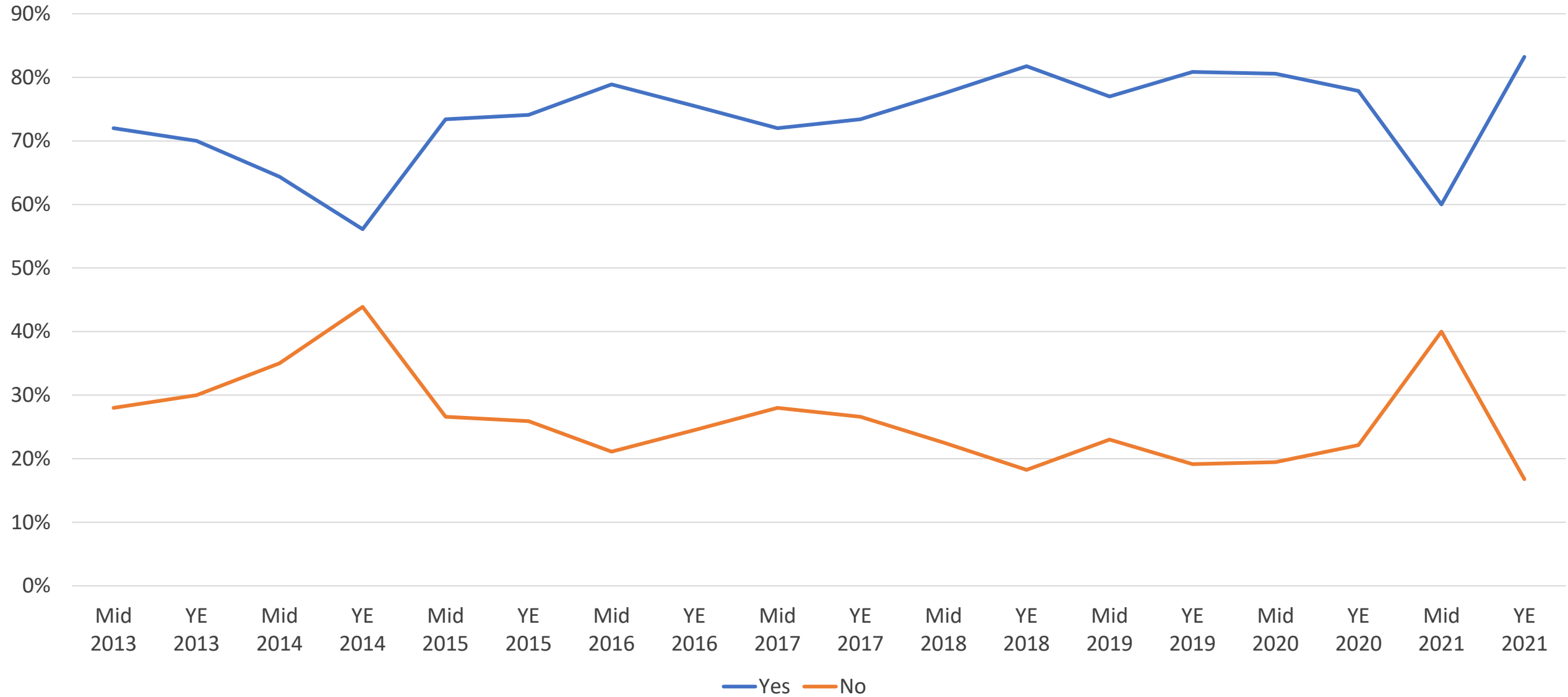
Does Membership have a voice in your organization's social media strategy?



— Yes — No

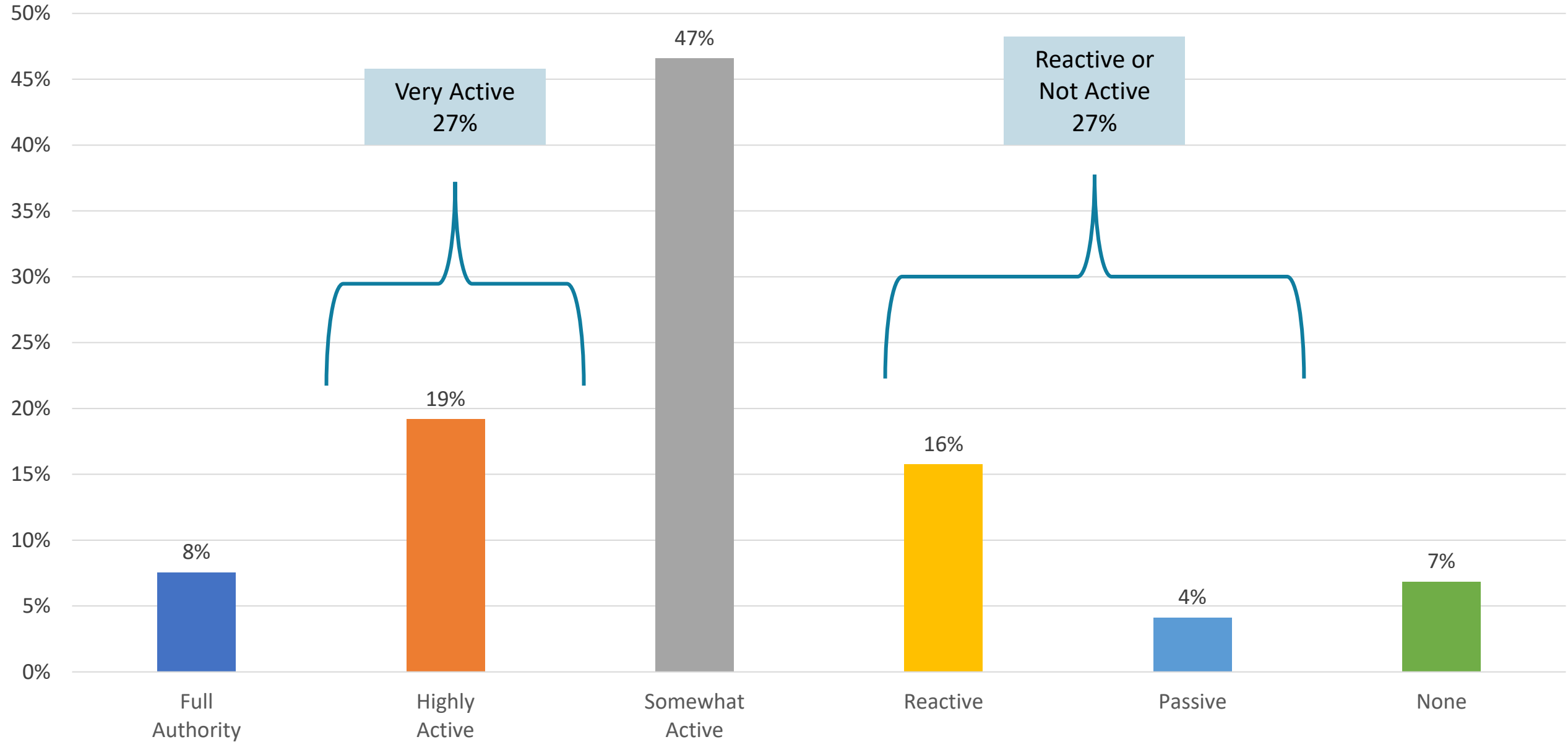


Does Membership have a voice in your organization's social media content management (e.g., membership messages, promotions, contests)?



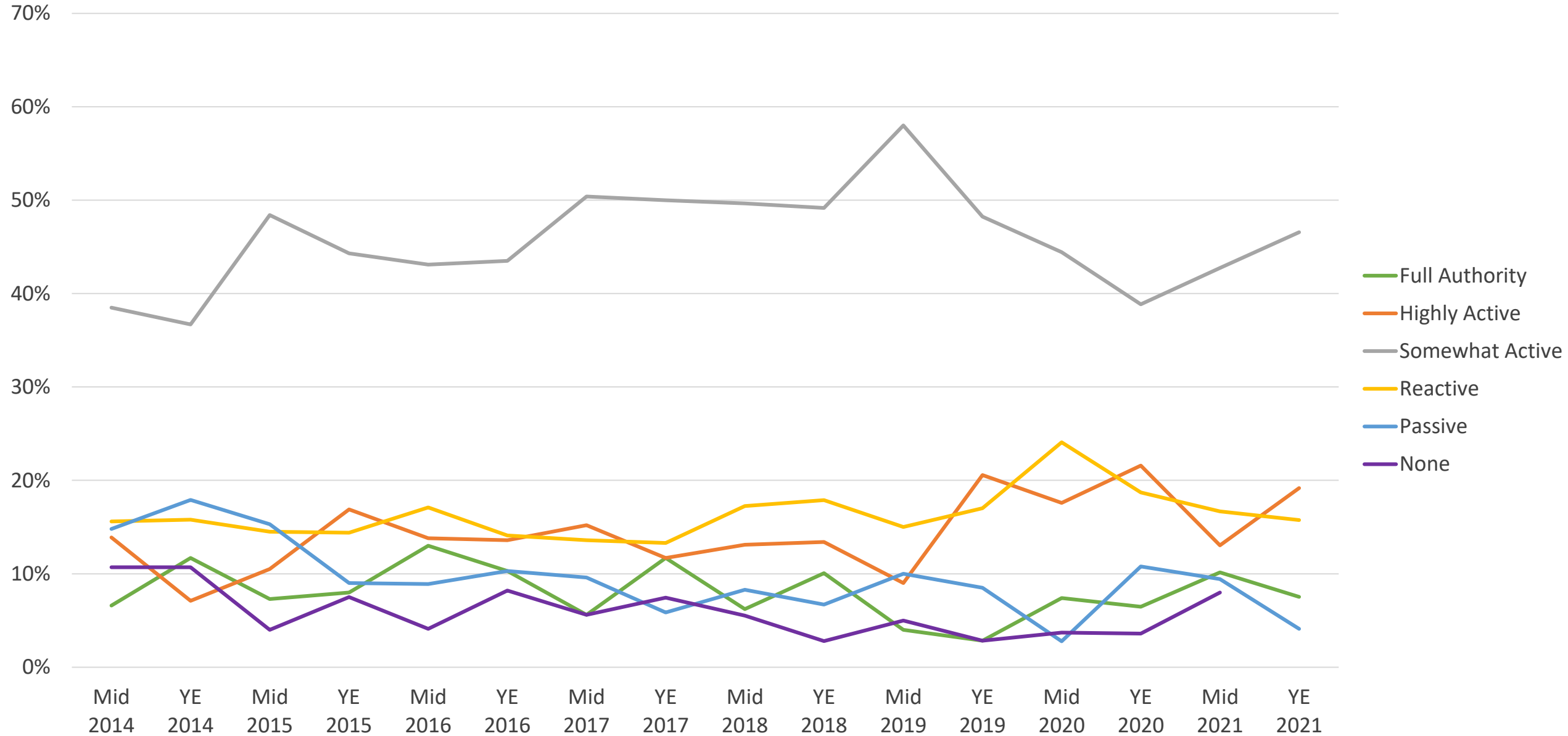


What type of role does membership have in social media content management?



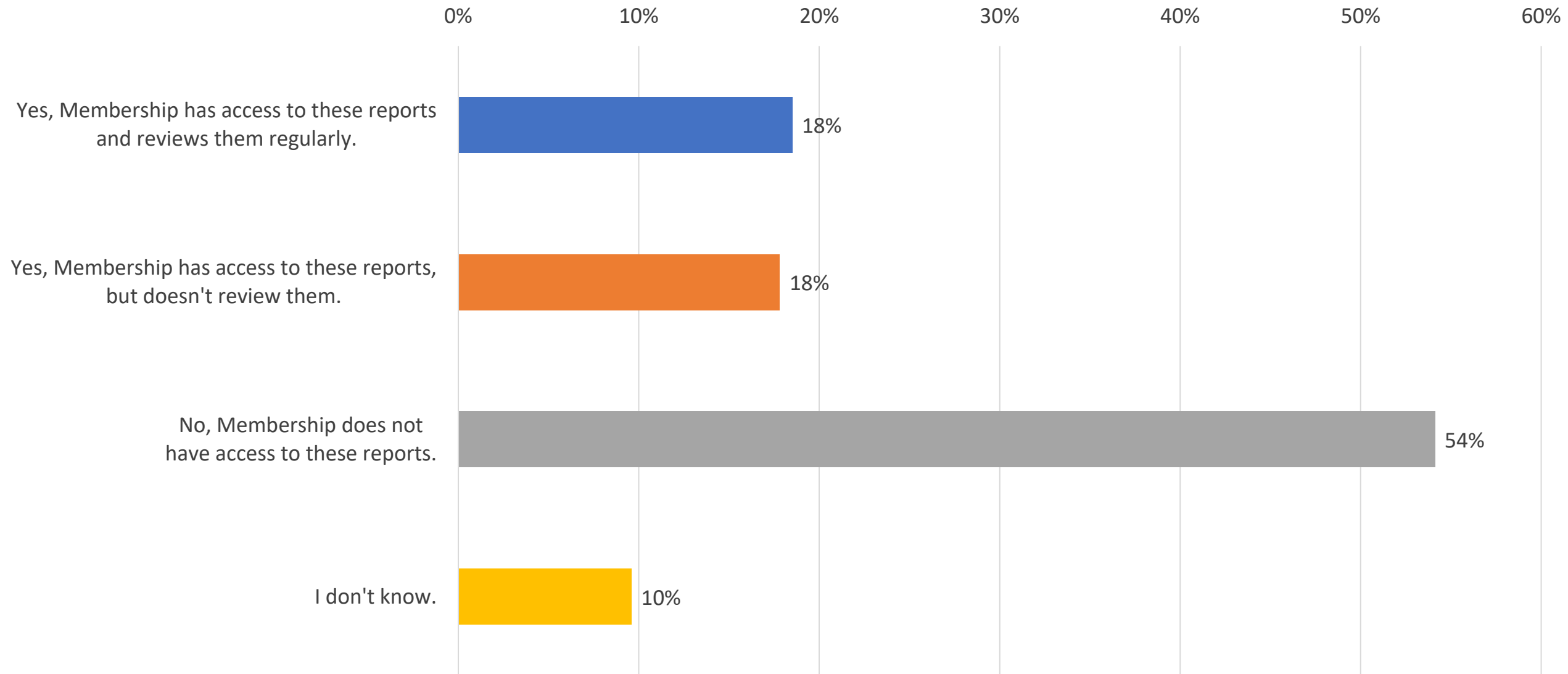


What type of role does membership have in social media content management?



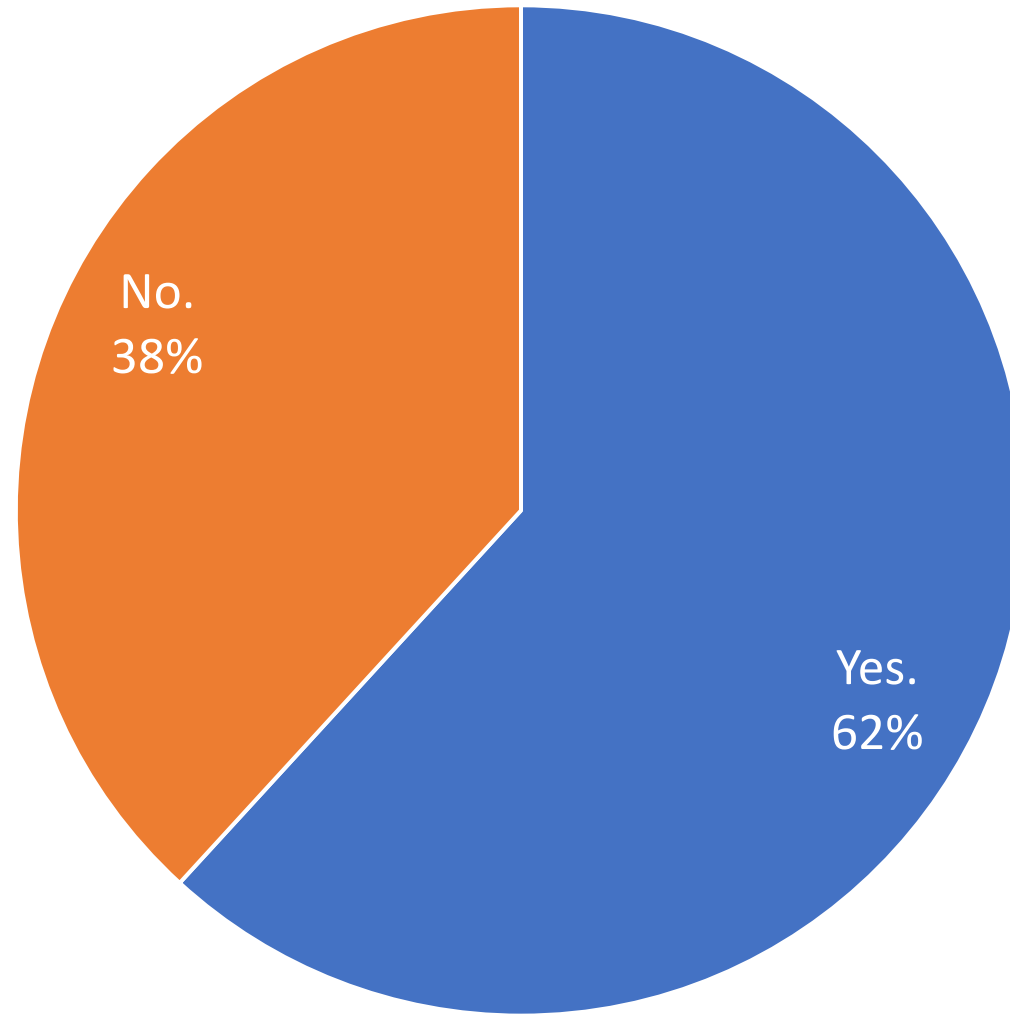


Does Membership have access to and/or does Membership review website/Google Analytics reports?



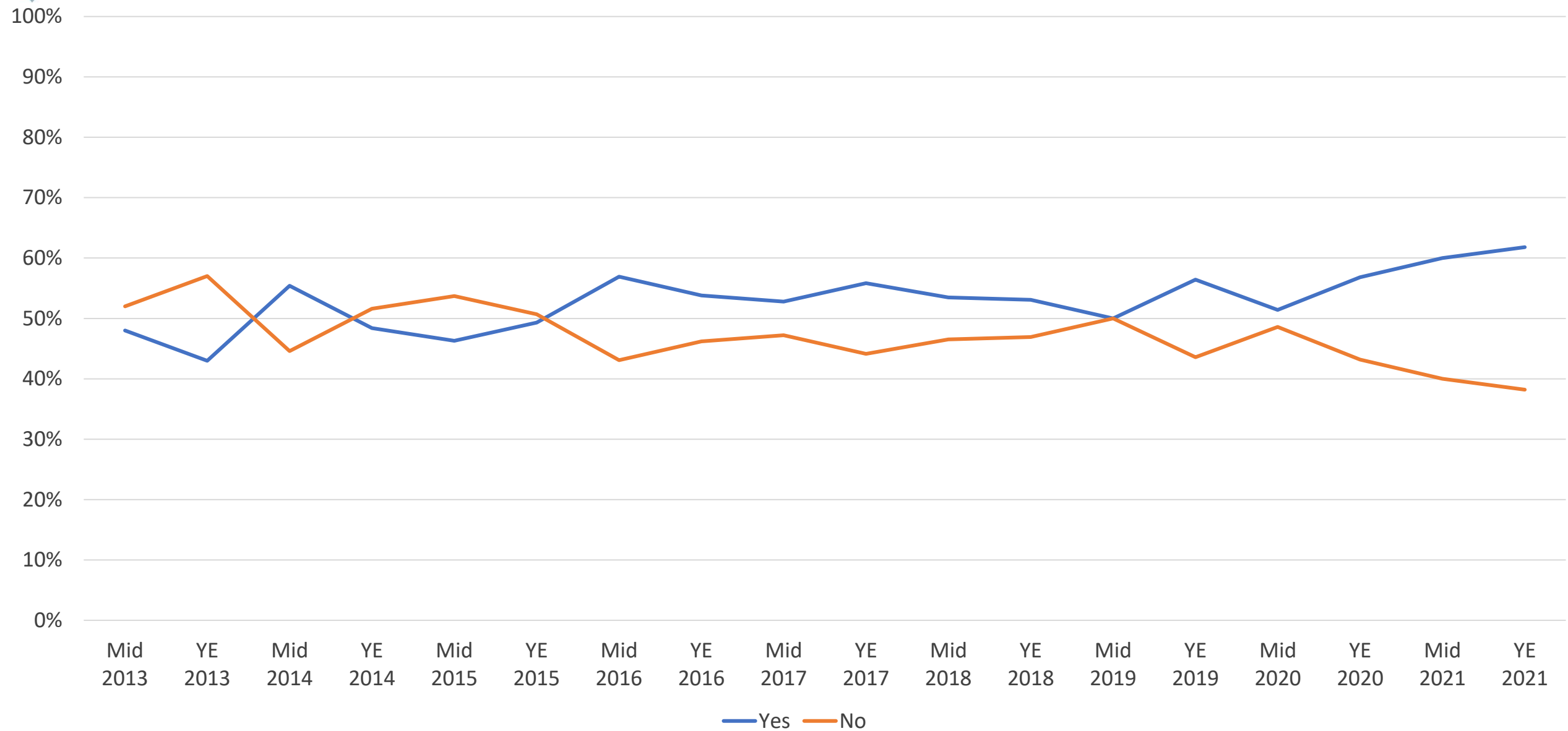


I am satisfied with the voice/role Membership has in our organization's social media strategy.





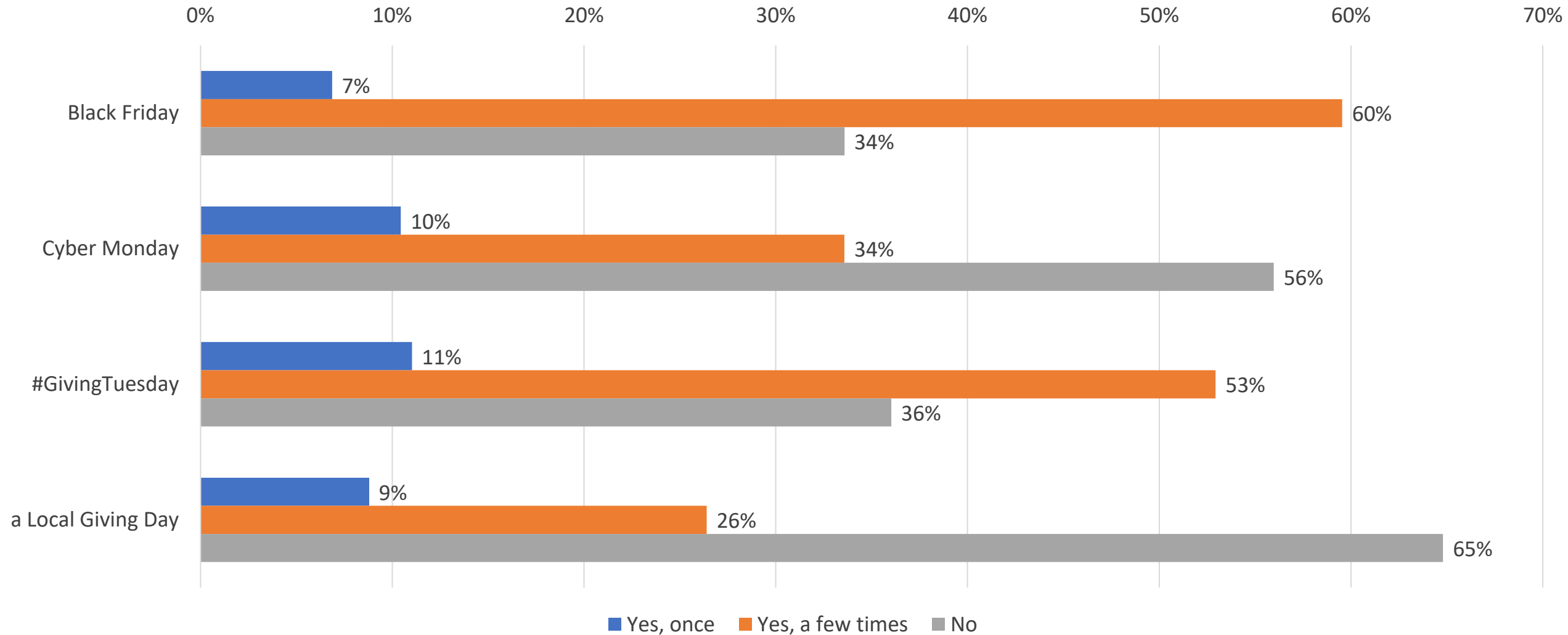
I am satisfied with the voice/role Membership has in our organization's social media strategy.



— Yes — No

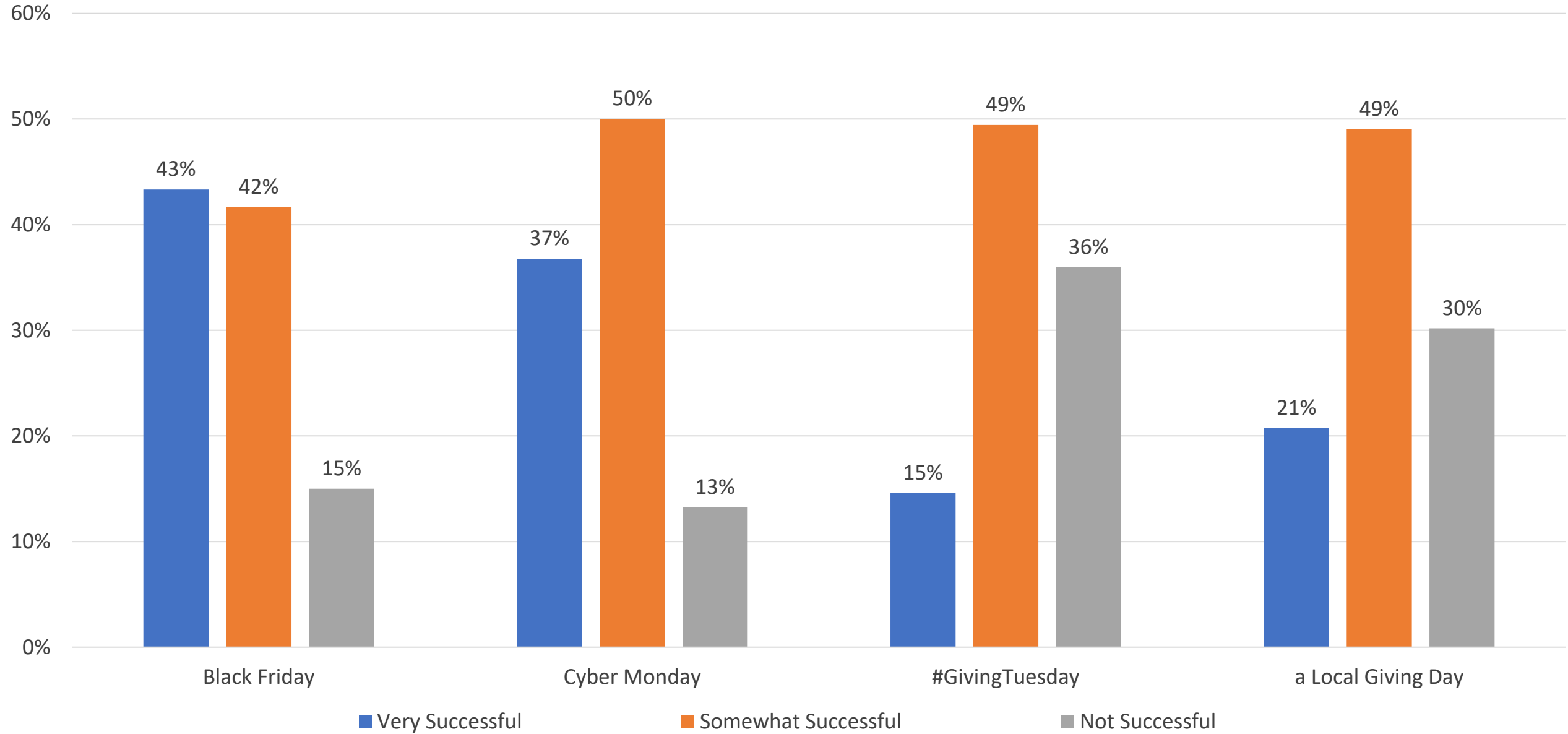


Has your organization participated in any of the following promotions for membership?



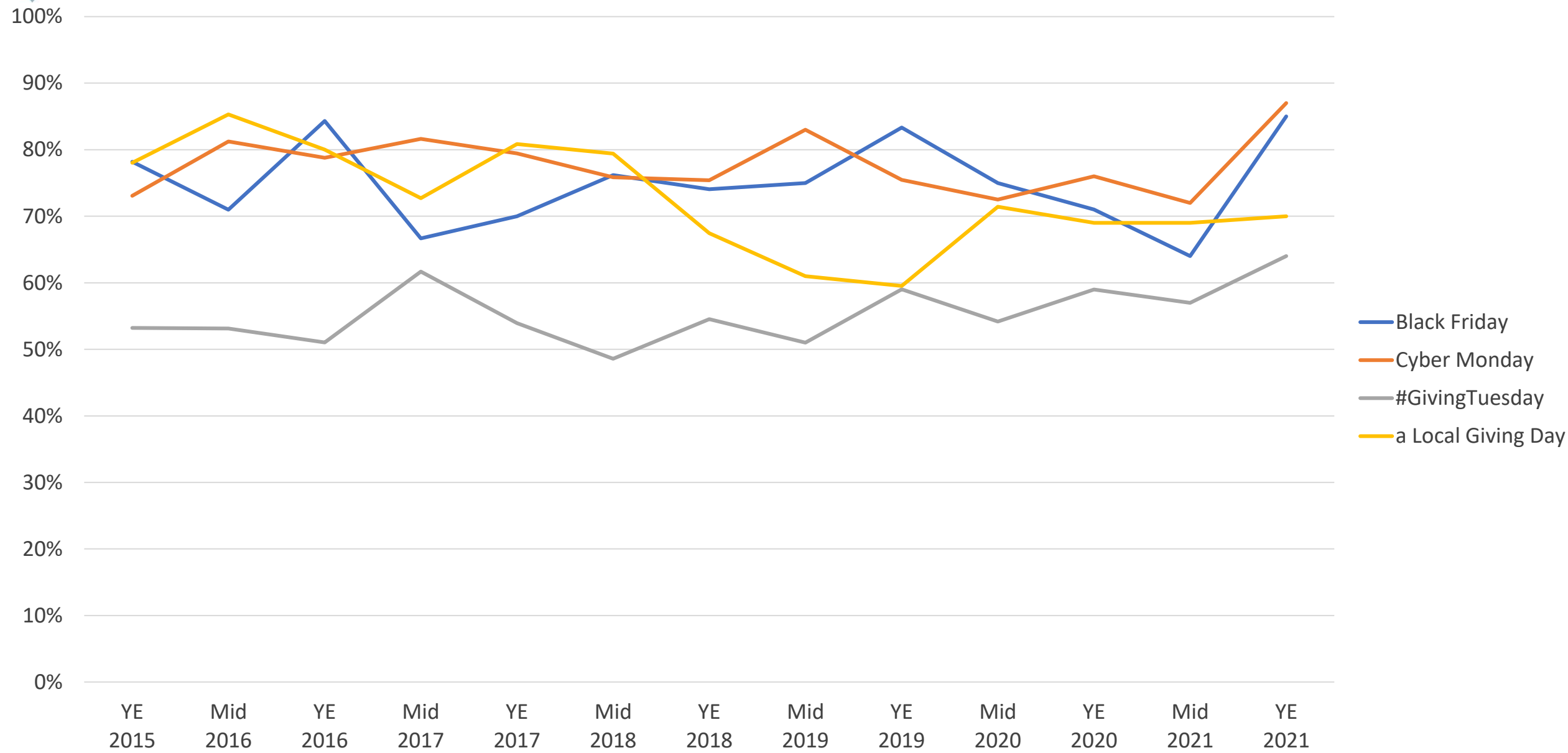


Was the campaign(s) successful?



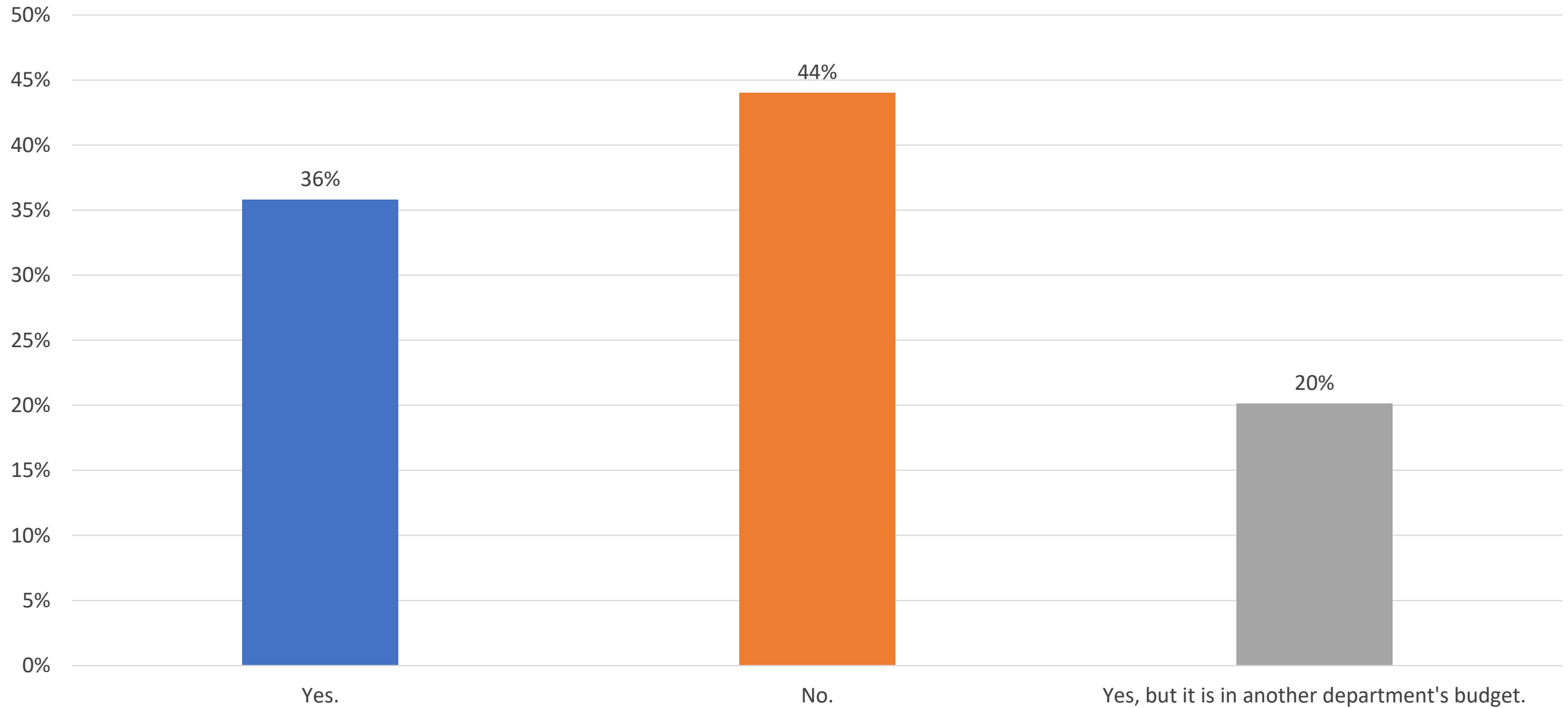


Giving Day Very or Somewhat Successful



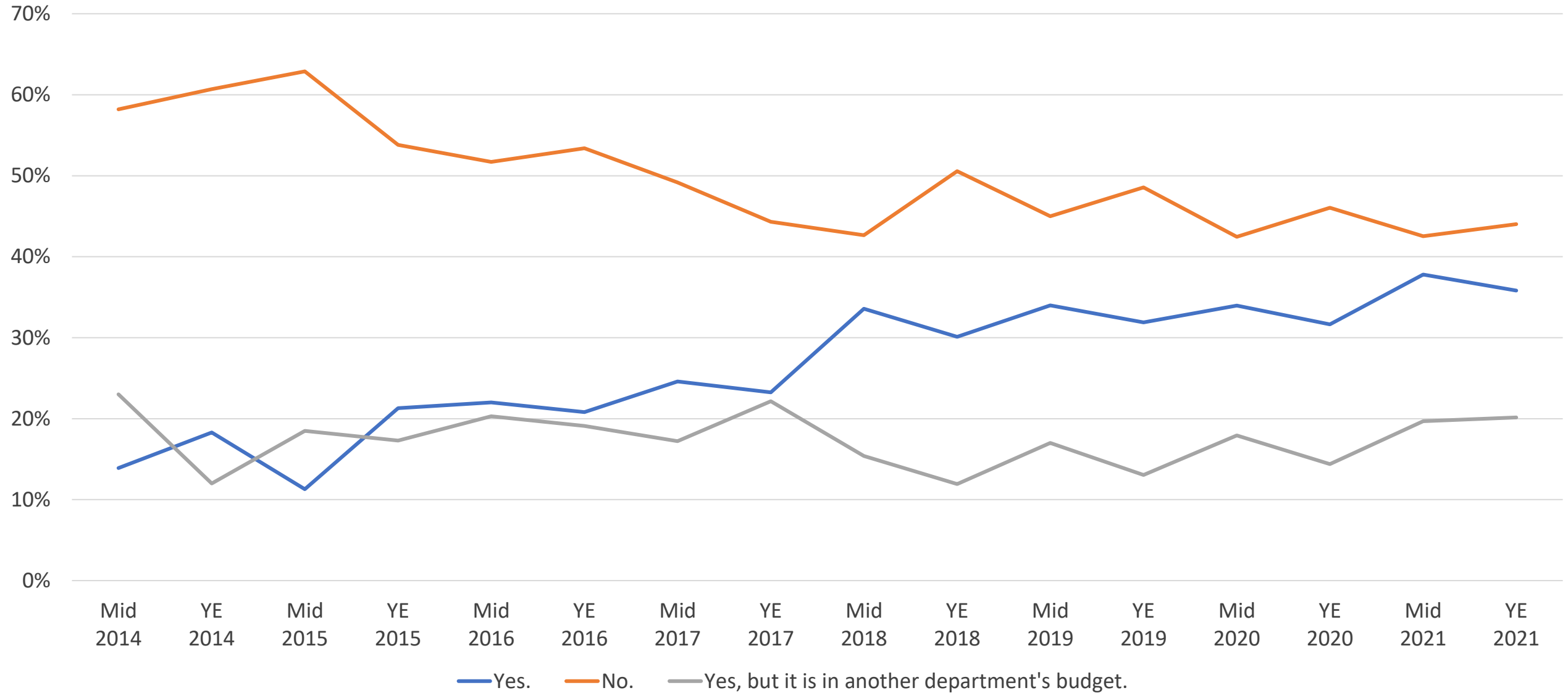


Does Membership have a dedicated line item in the budget for digital marketing (e.g., online advertising, social media campaigns, email marketing)?



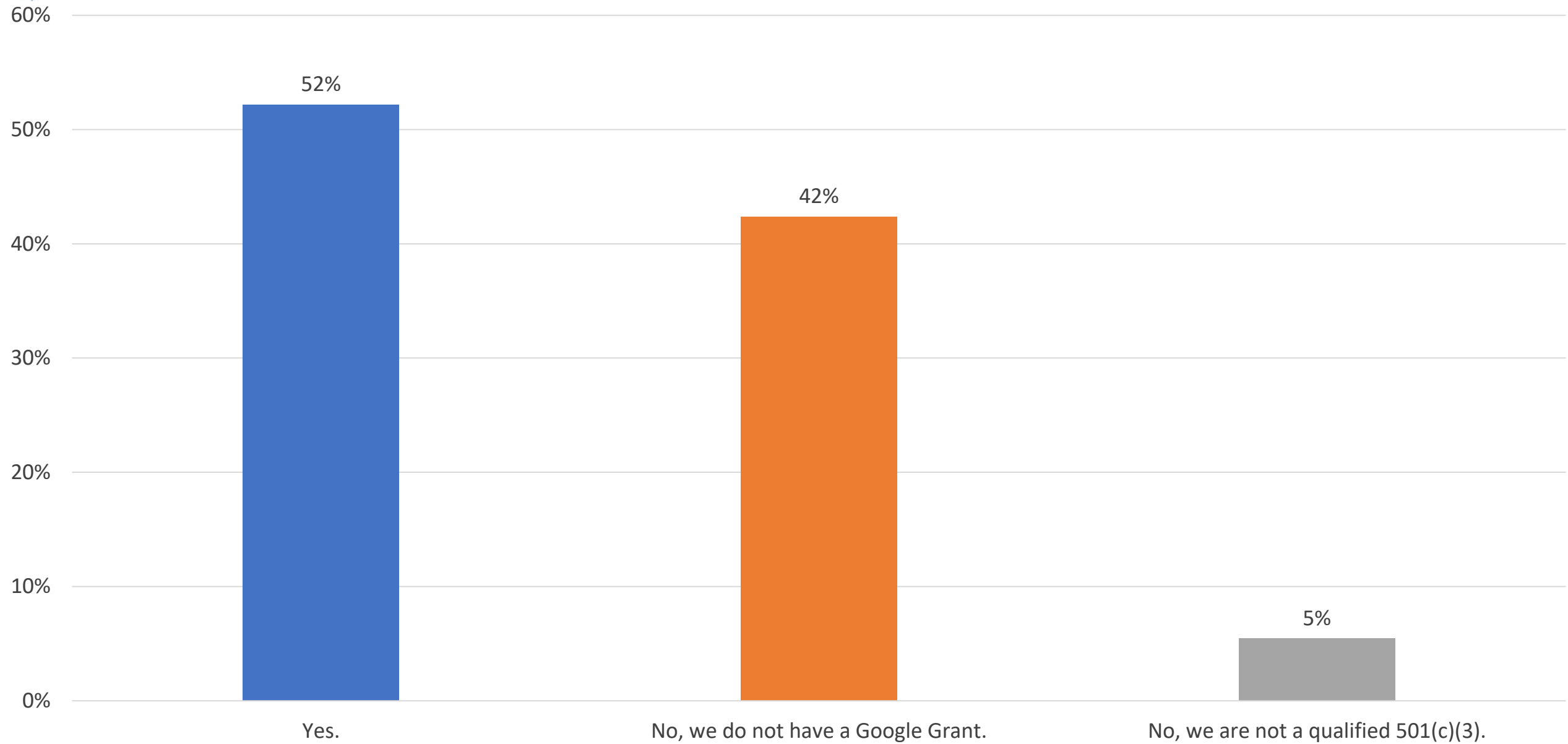


Does Membership have a dedicated line item in the budget for digital marketing (e.g., online advertising, social media campaigns, email marketing)?



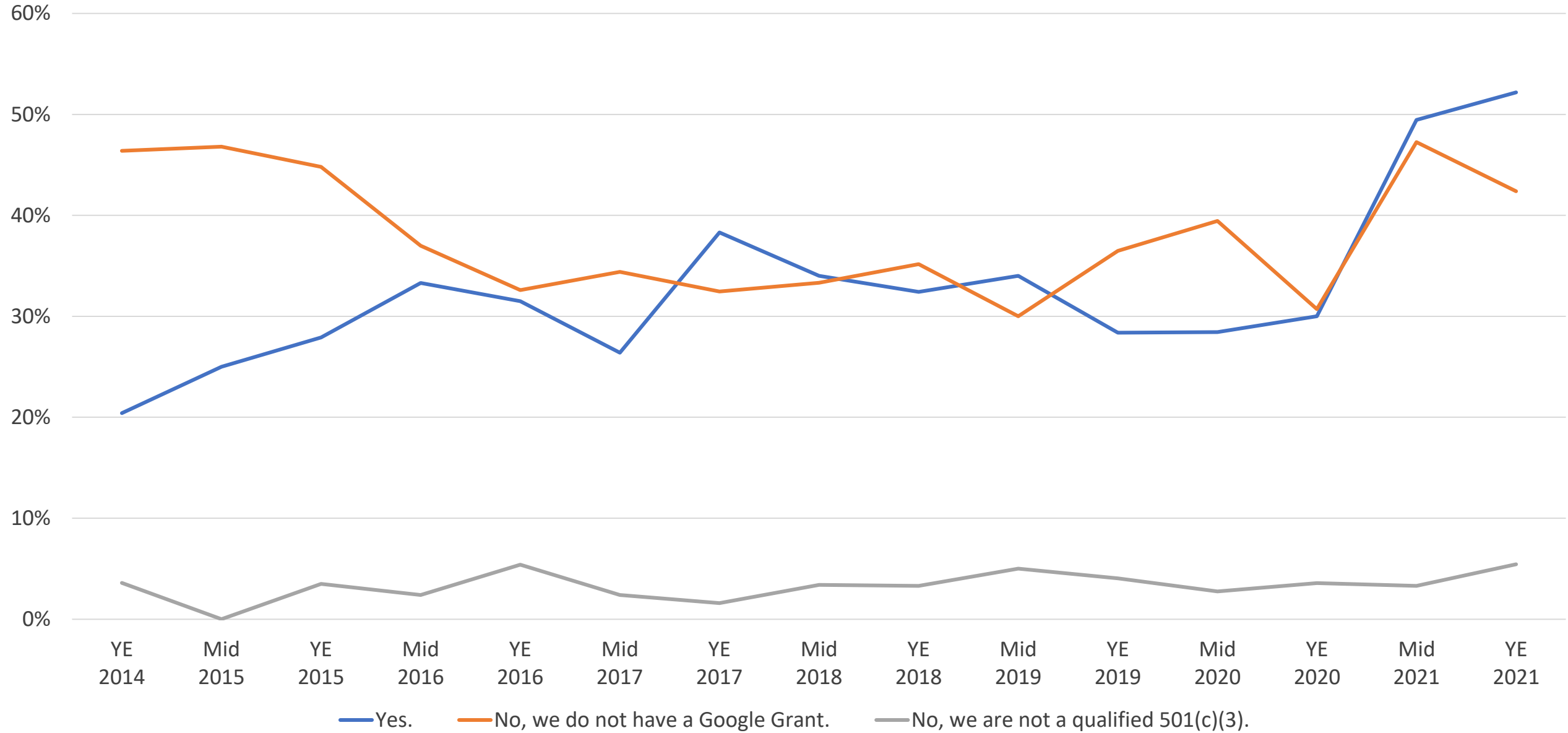


Does your organization have a Google Grant for online advertising (i.e., Google AdWords)?





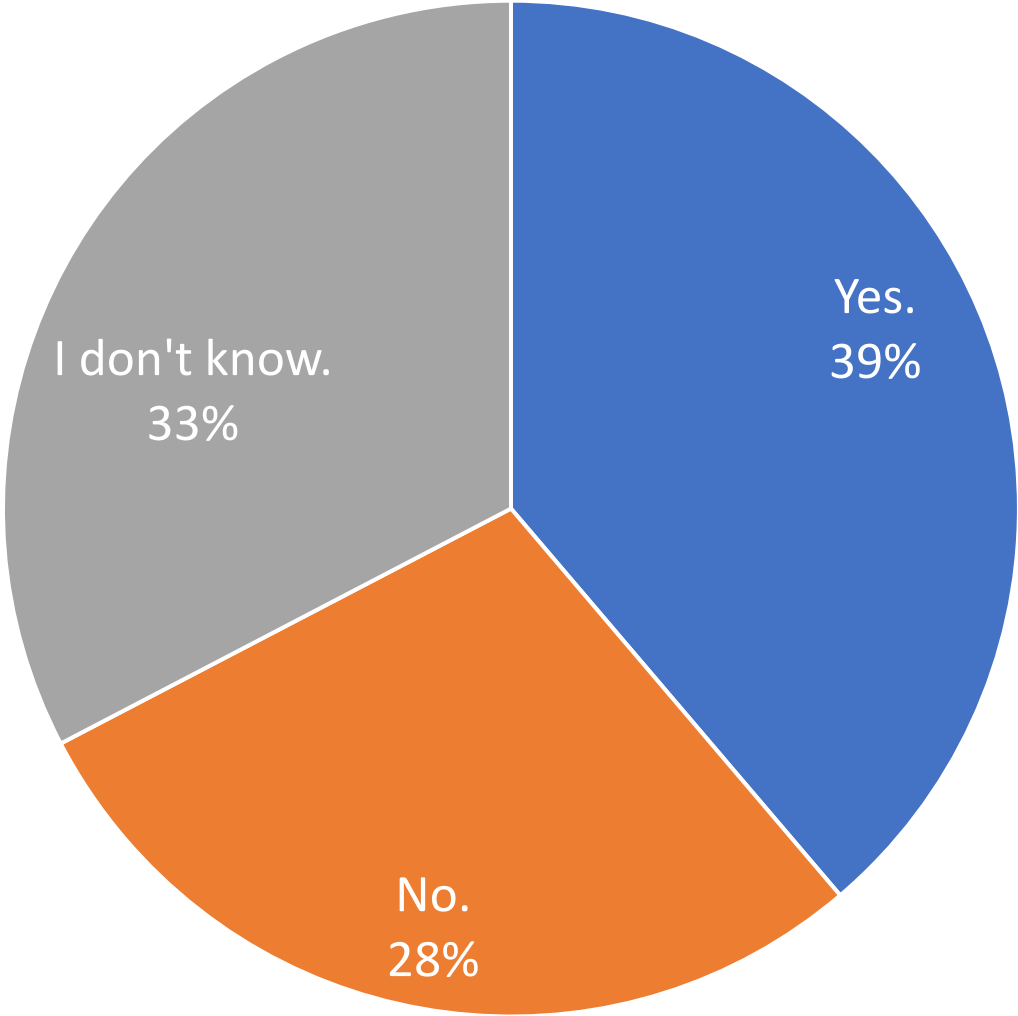
Does your organization have a Google Grant for online advertising (i.e., Google AdWords)?



— Yes. — No, we do not have a Google Grant. — No, we are not a qualified 501(c)(3).

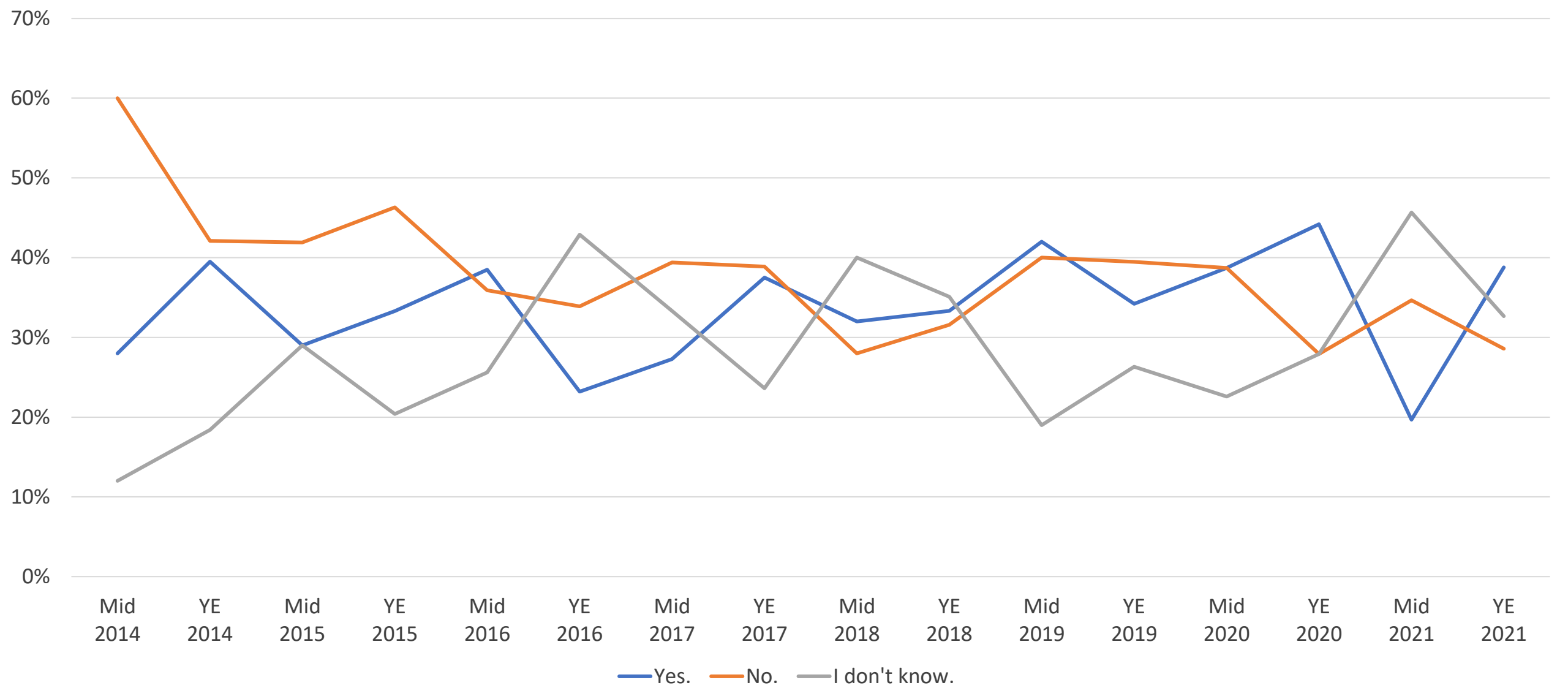


Is Membership acquisition supported by membership advertising as a portion of the Google Grant?



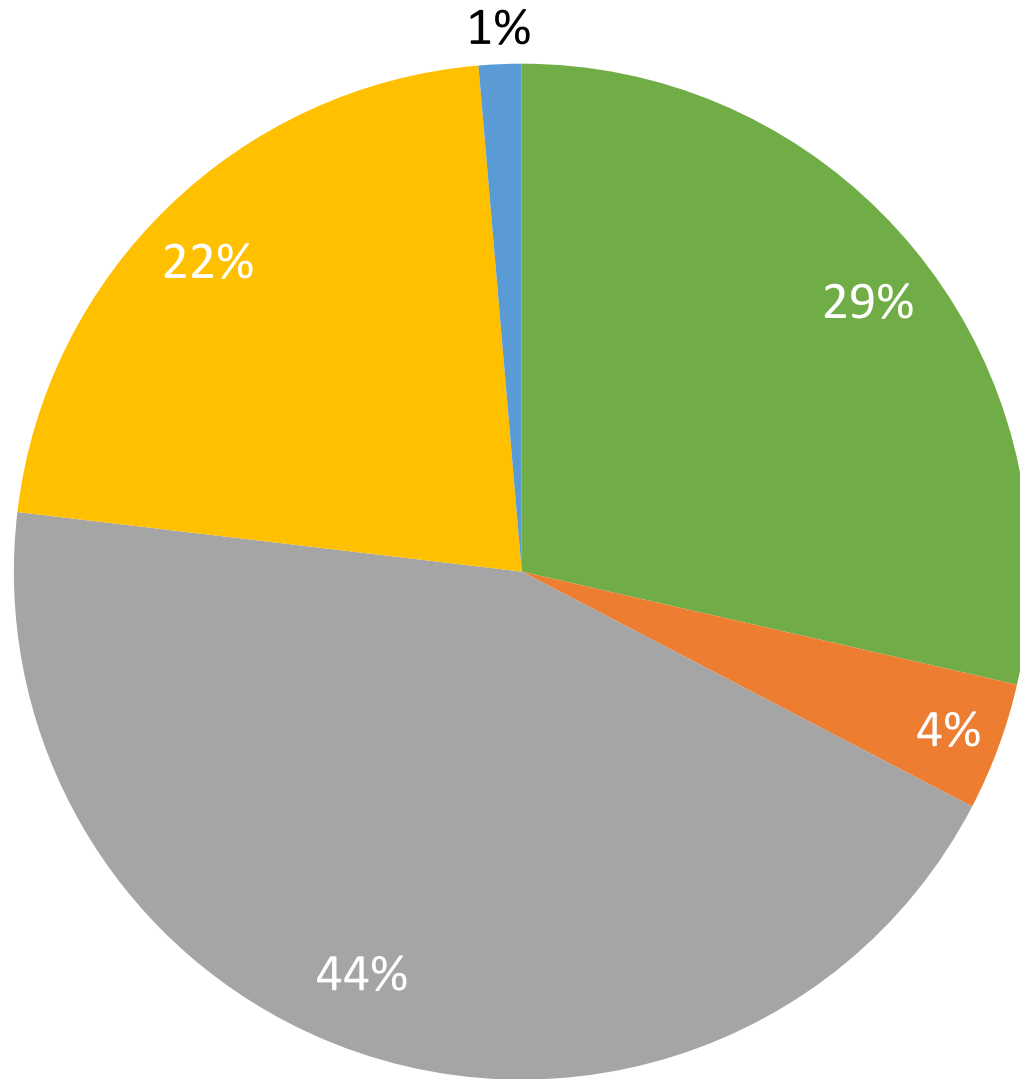


Is Membership acquisition supported by membership advertising as a portion of the Google Grant?





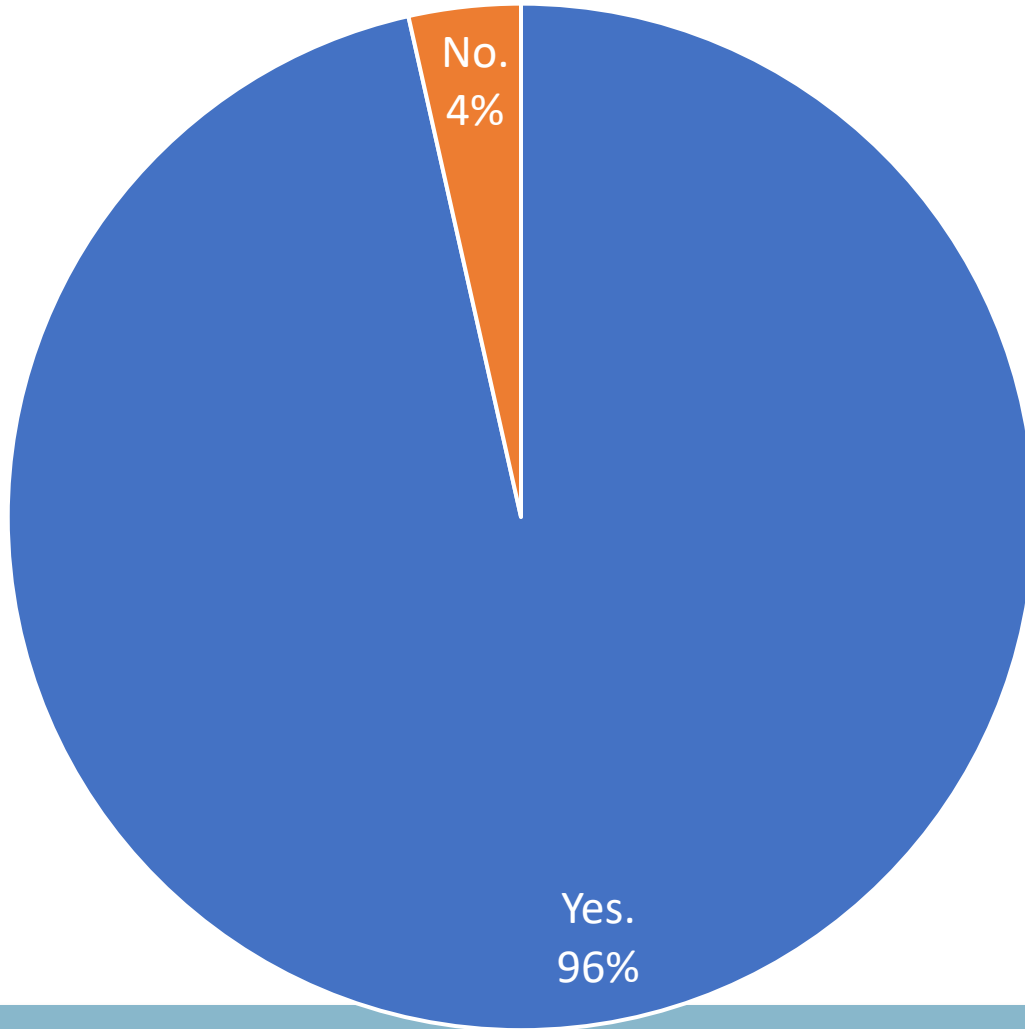
Are you currently able to deliver digital membership cards to your members?



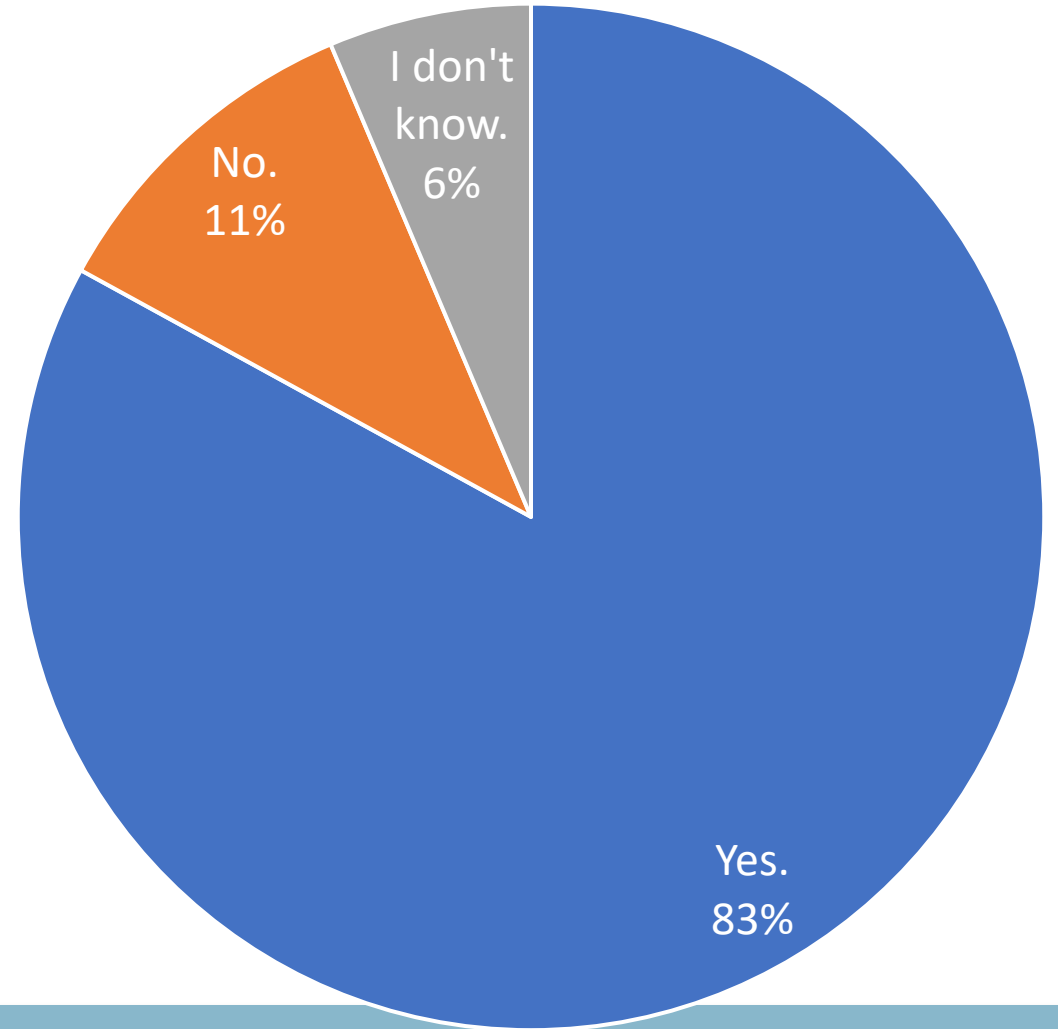
- Yes, and we do offer this service to members.
- Yes, but we do not offer this service to members.
- No, we are unable to offer this service to members, but would like to offer it to members.
- No, we are unable to offer this service to members, and do not wish to offer it to members.
- I don't know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



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

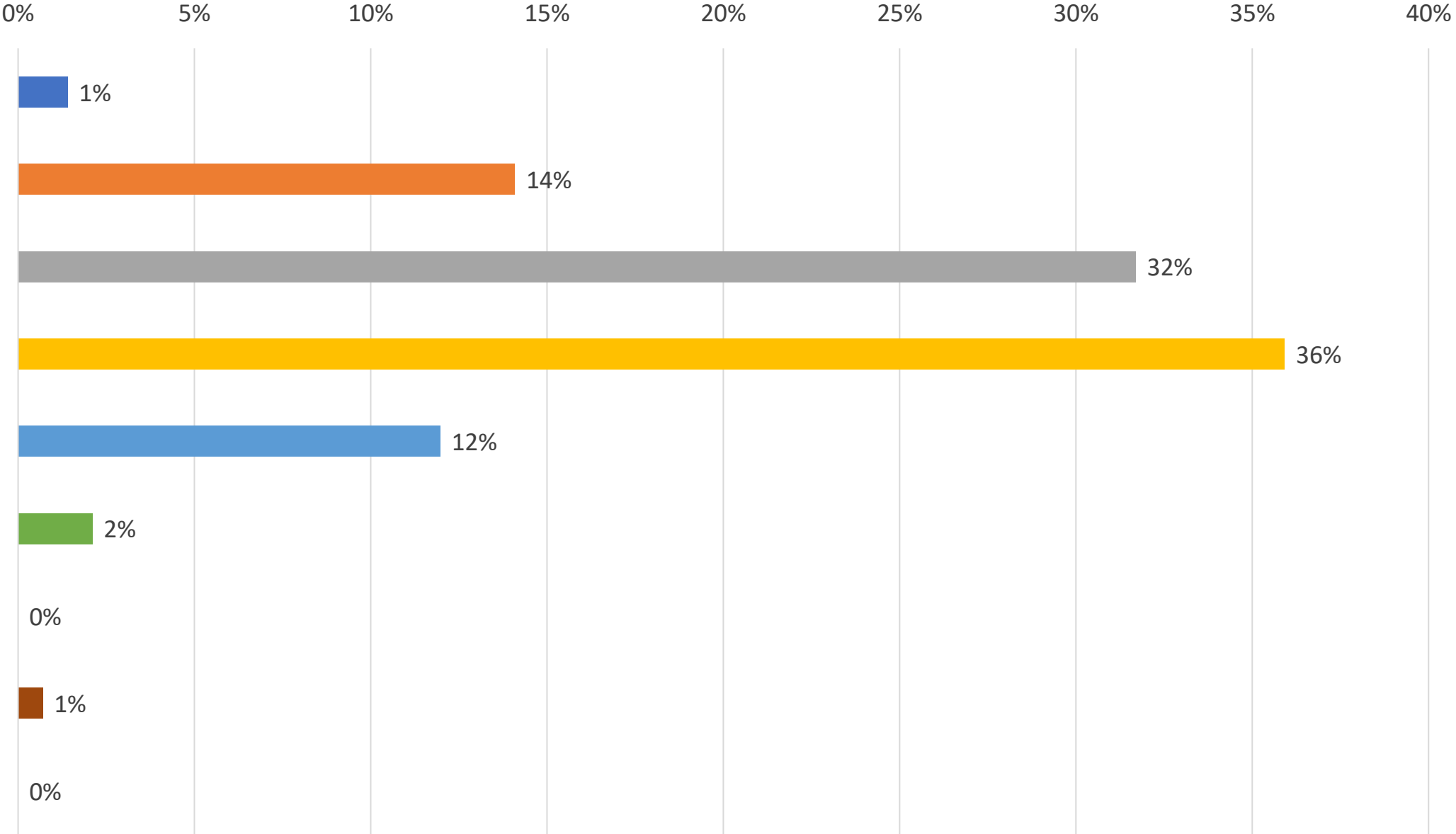


Are you able to send promotional emails about membership to the institutional house list (e.g., ticket buyers, visitors, etc.)?



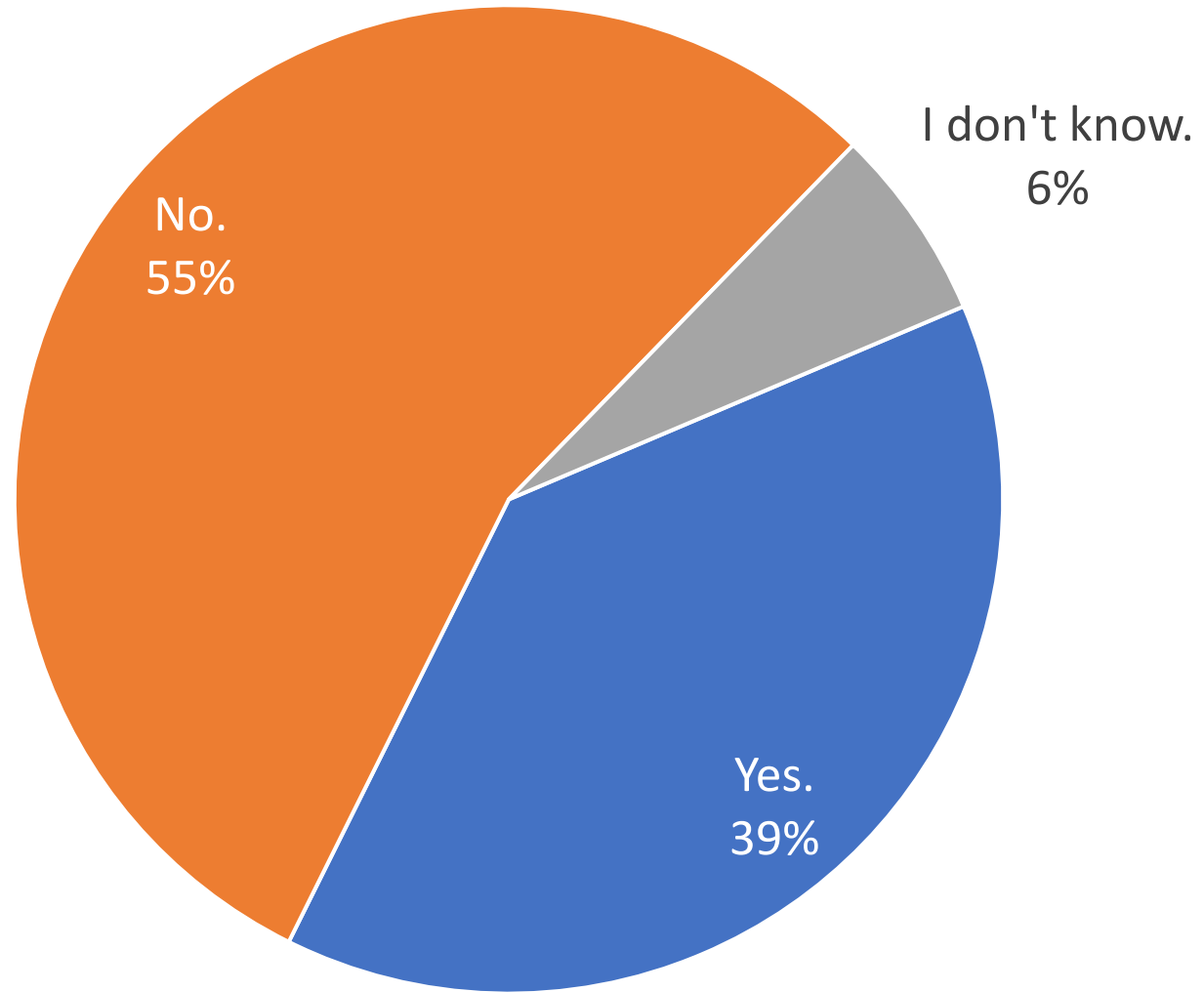


How often do your members receive email communication from your organization?



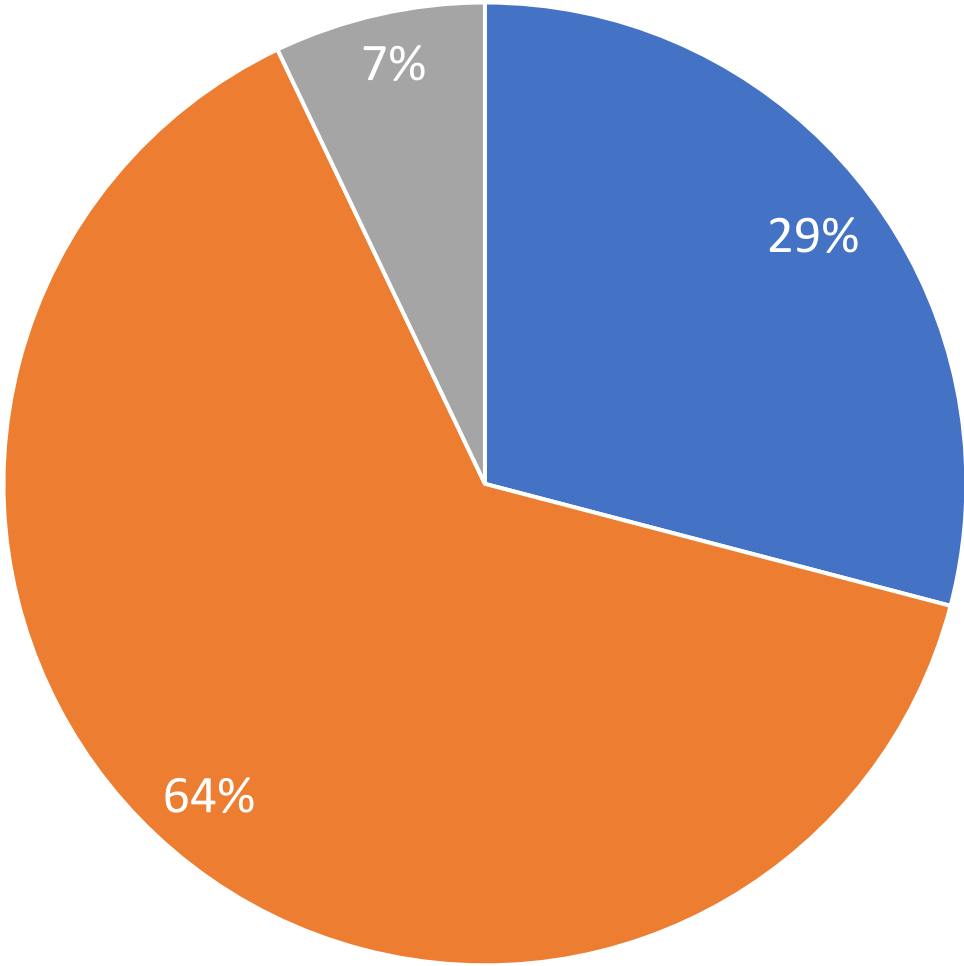


Does your organization limit the number of emails members can receive?





During the Covid-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 very important
- 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

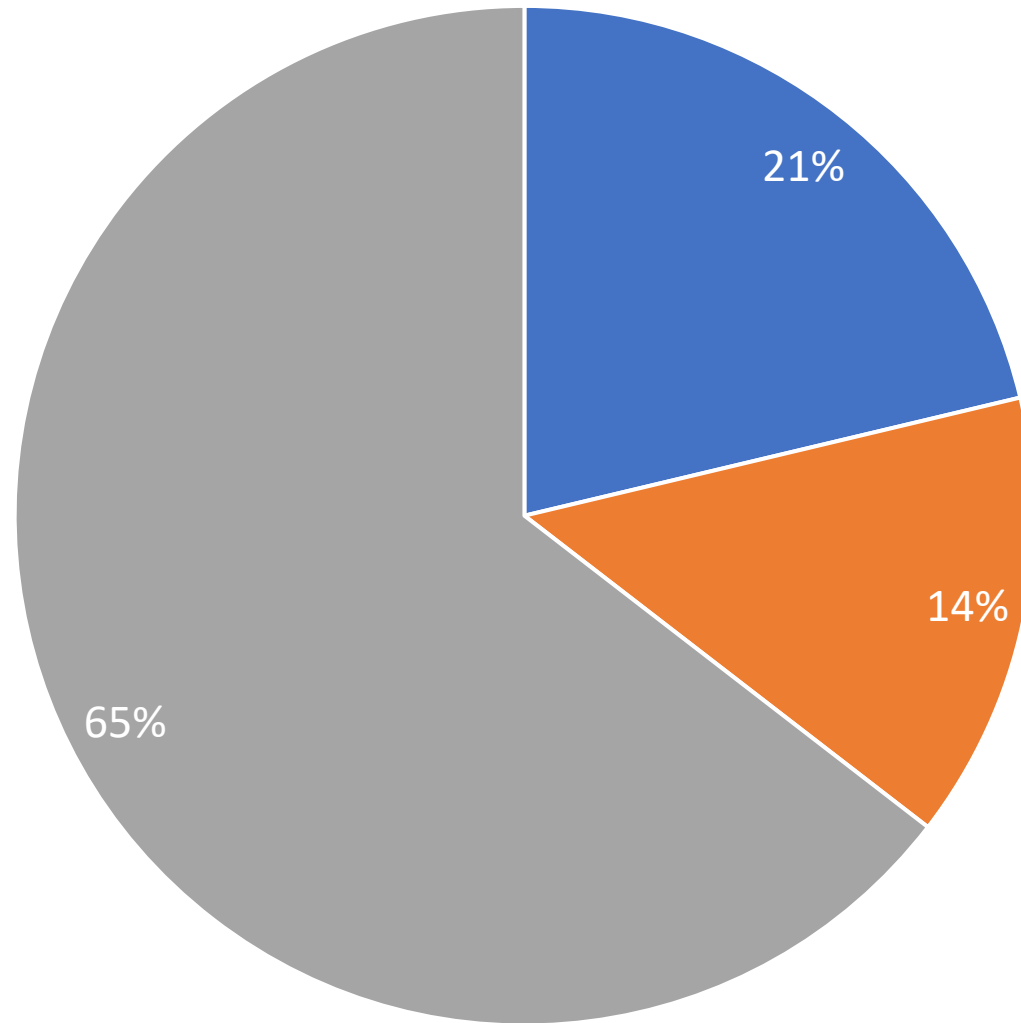


Staffing and Salary

Pulse 2021 Year-End Data



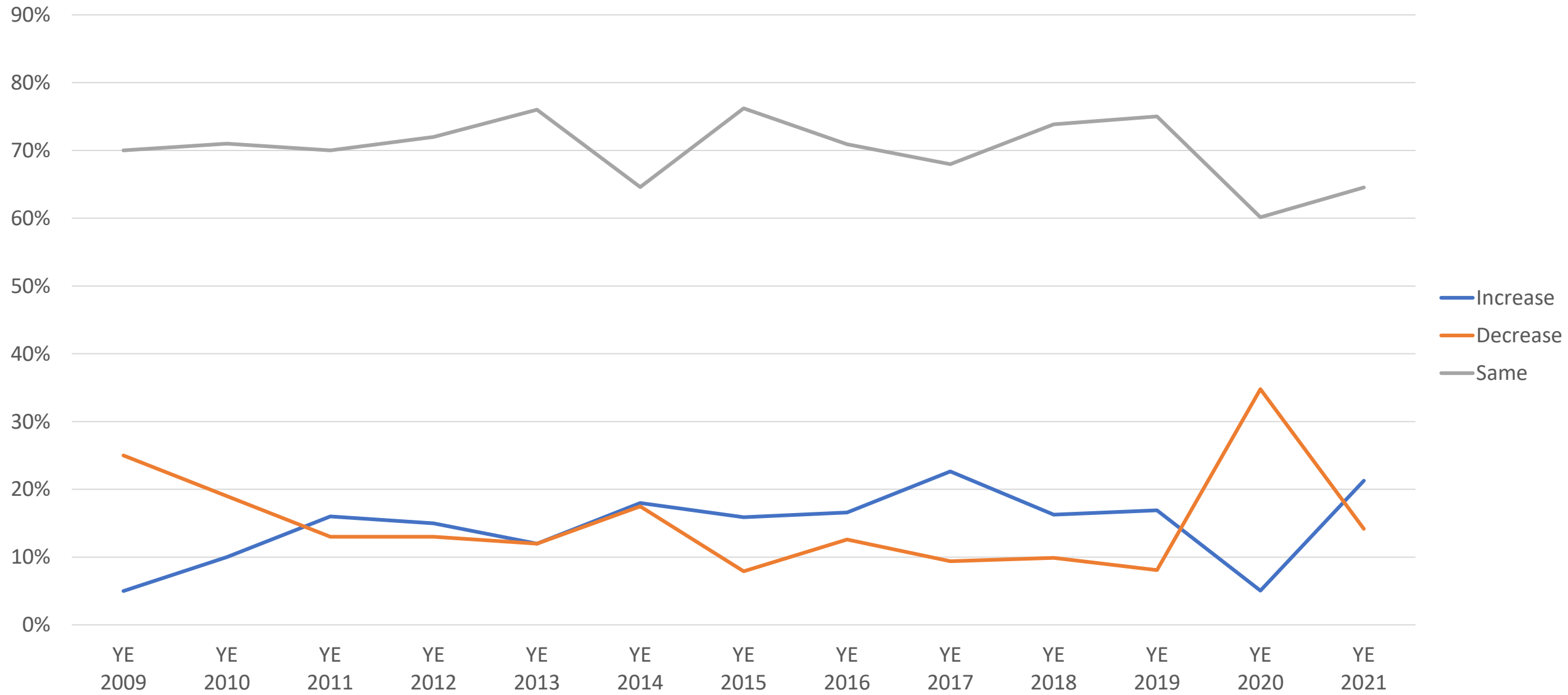
In 2021, staffing levels within the membership department ...



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

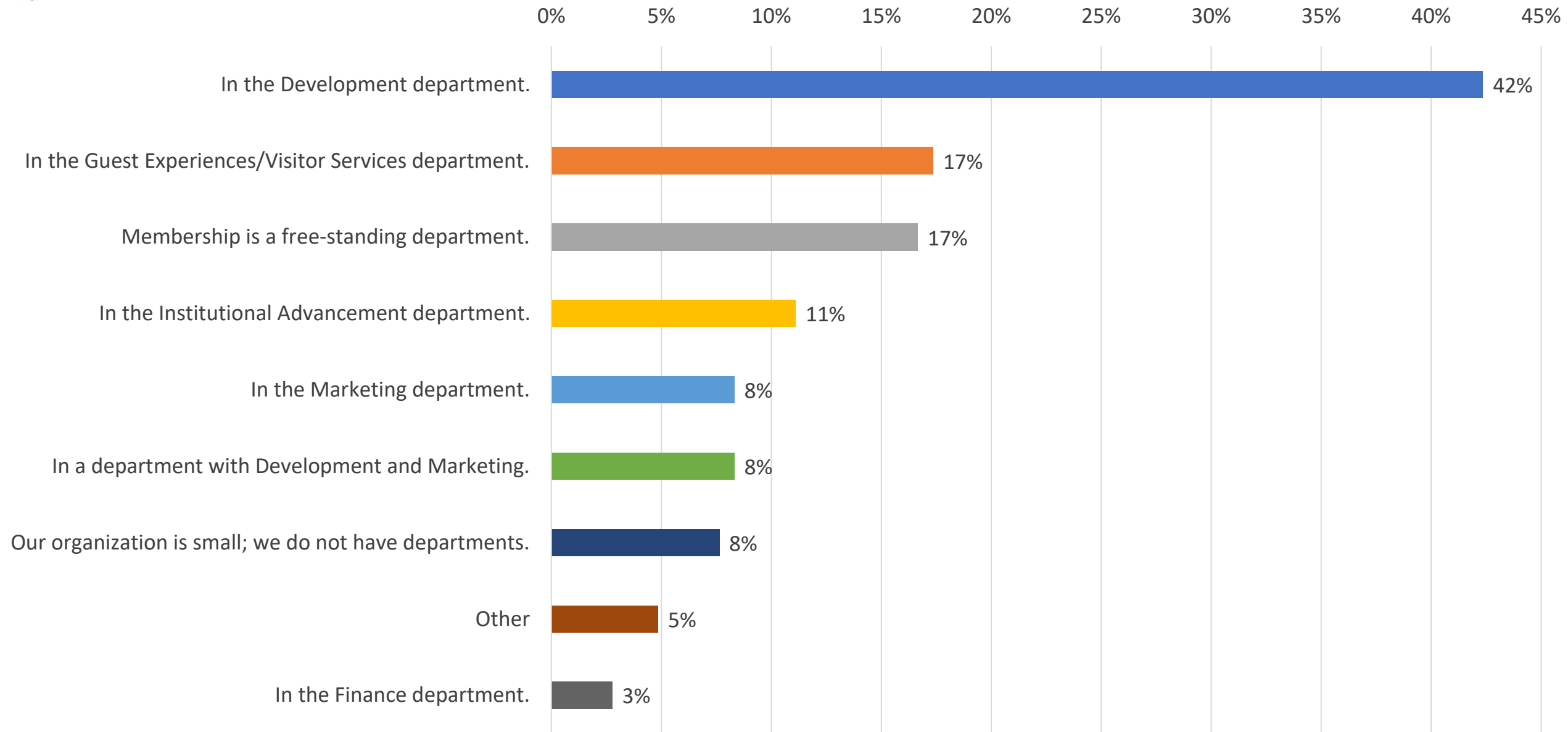


Staffing Levels



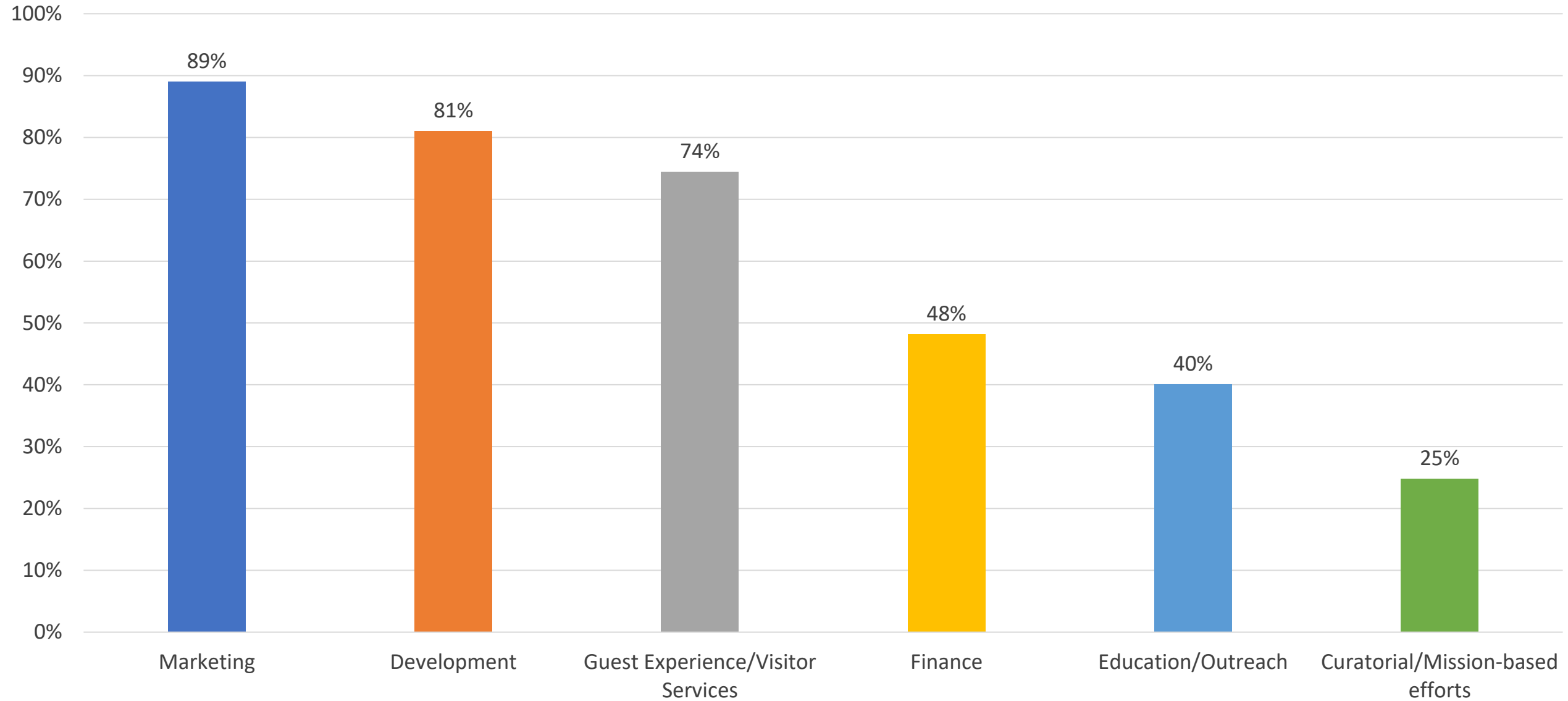


How is Membership positioned in your organization? (Check all that apply.)



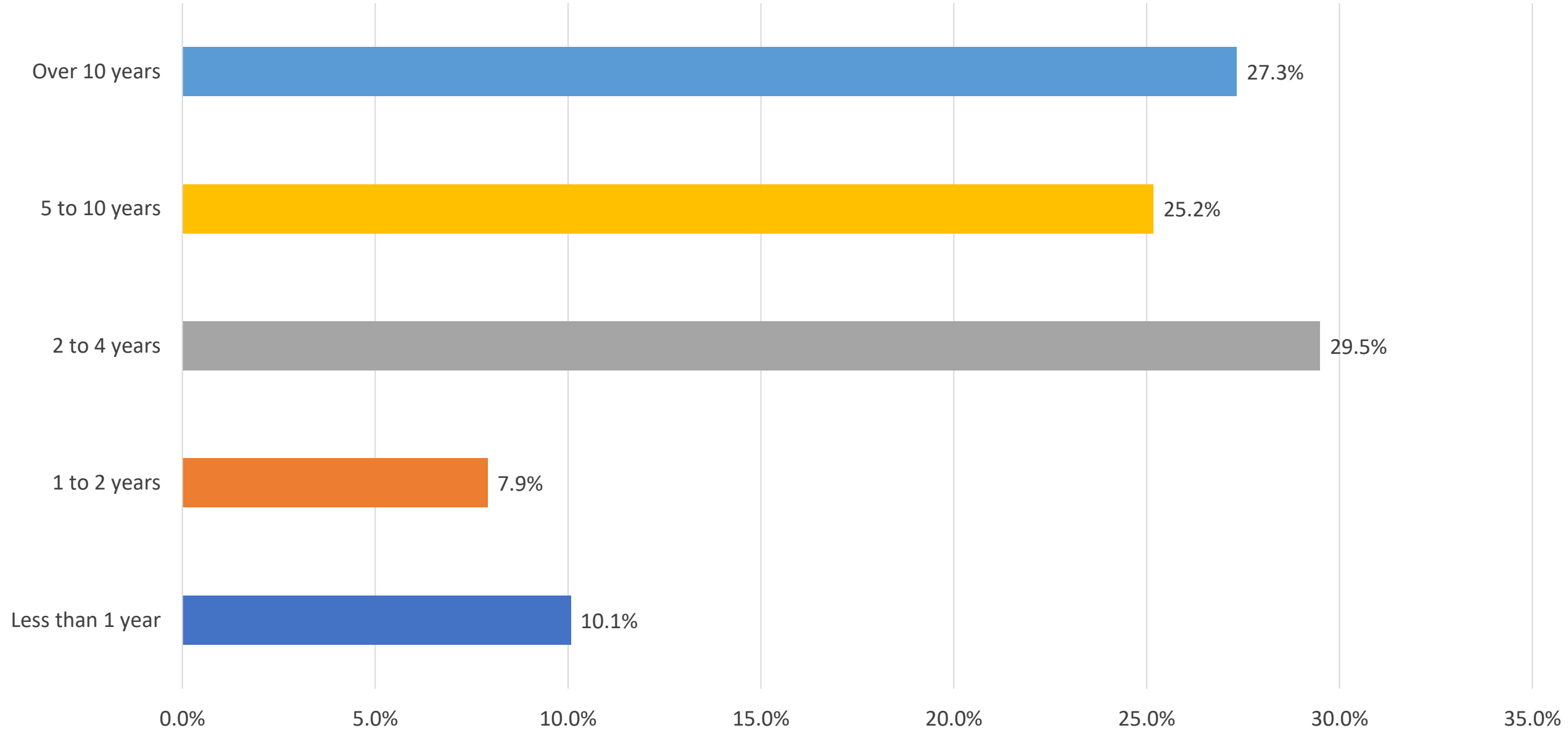


Does membership planning occur with and do you have the support of the following departments? (Check all that apply.)



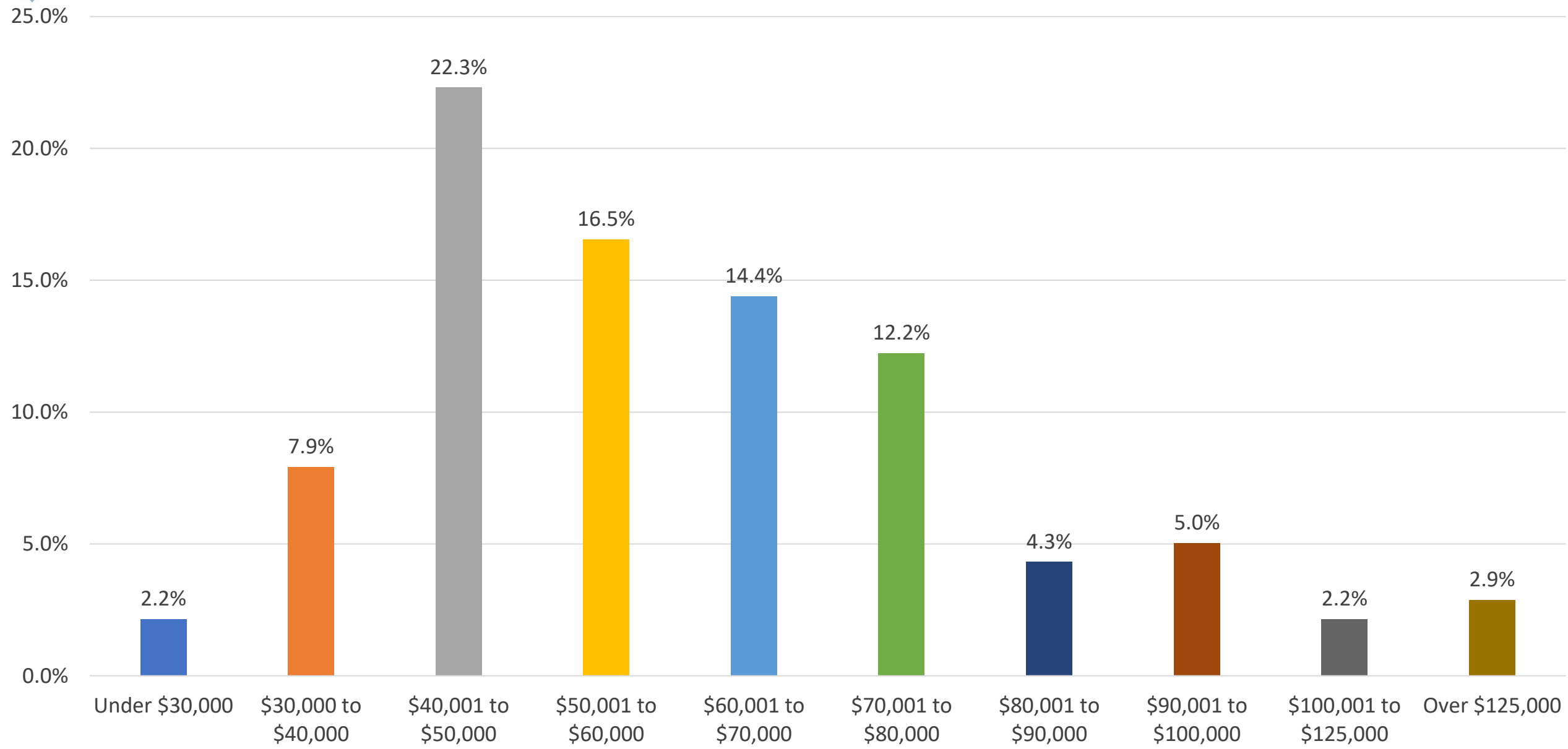


How long have you served in a membership position?





What is your annual salary range?



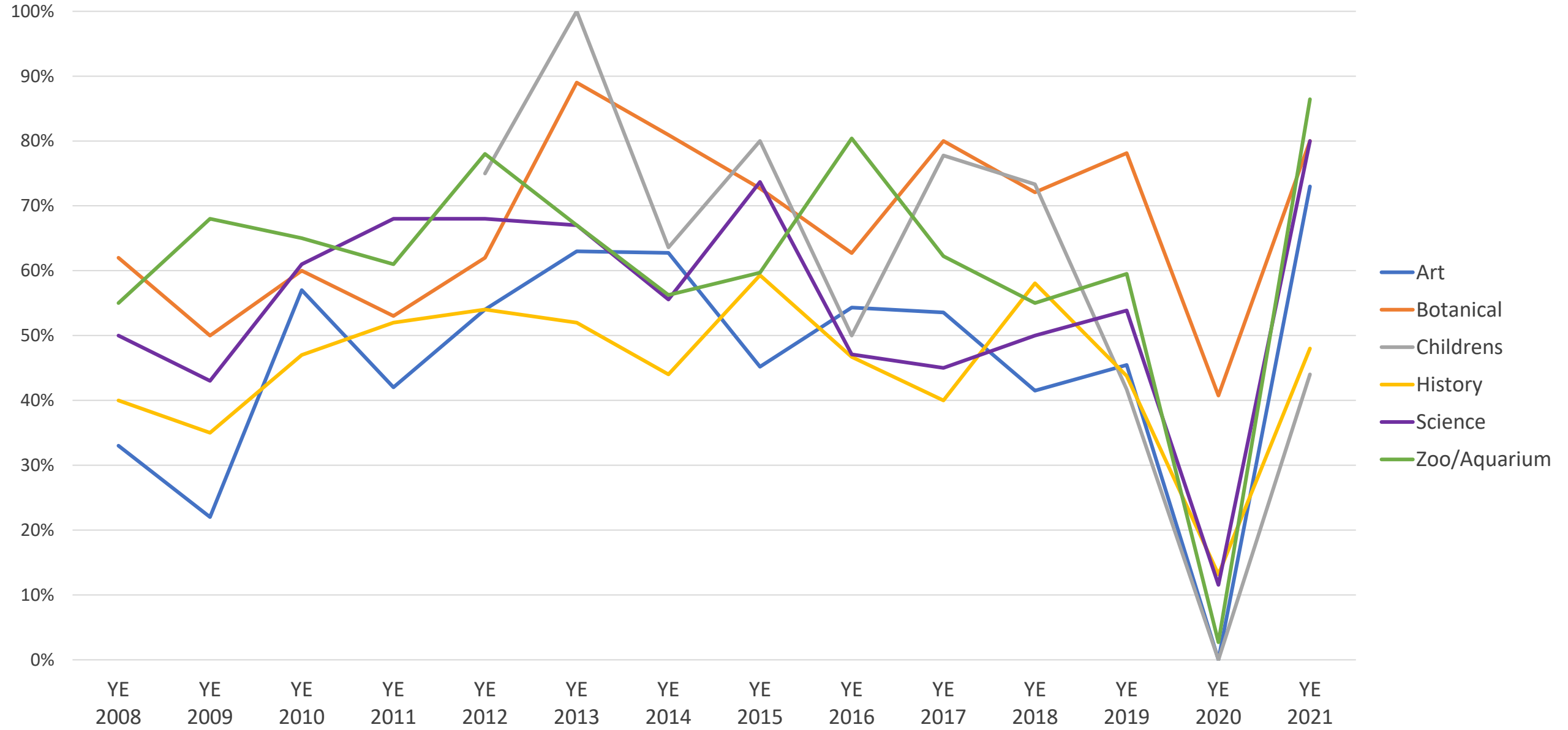


Trends by Niche Audience

Pulse 2021 Year-End Data

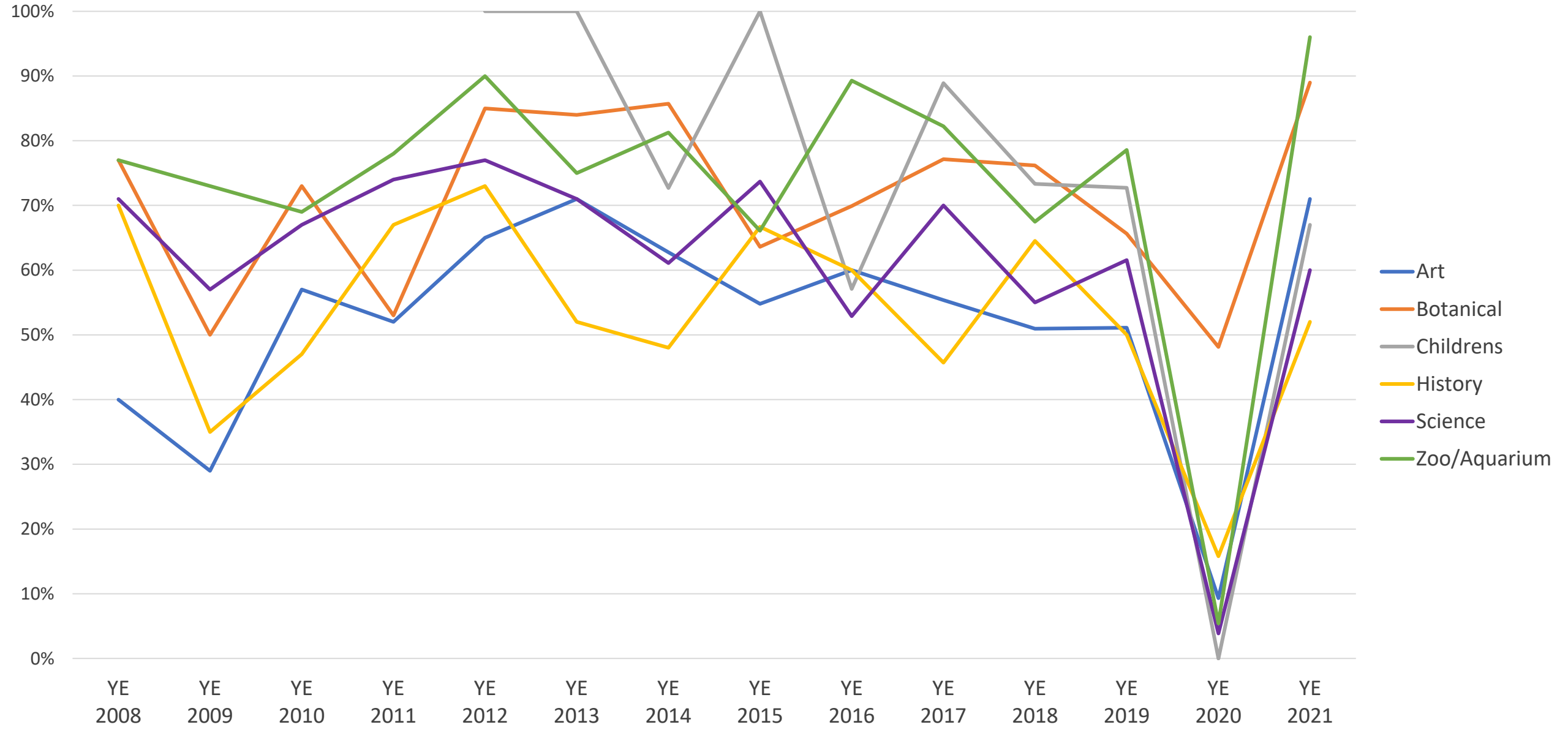


Membership increase from last year



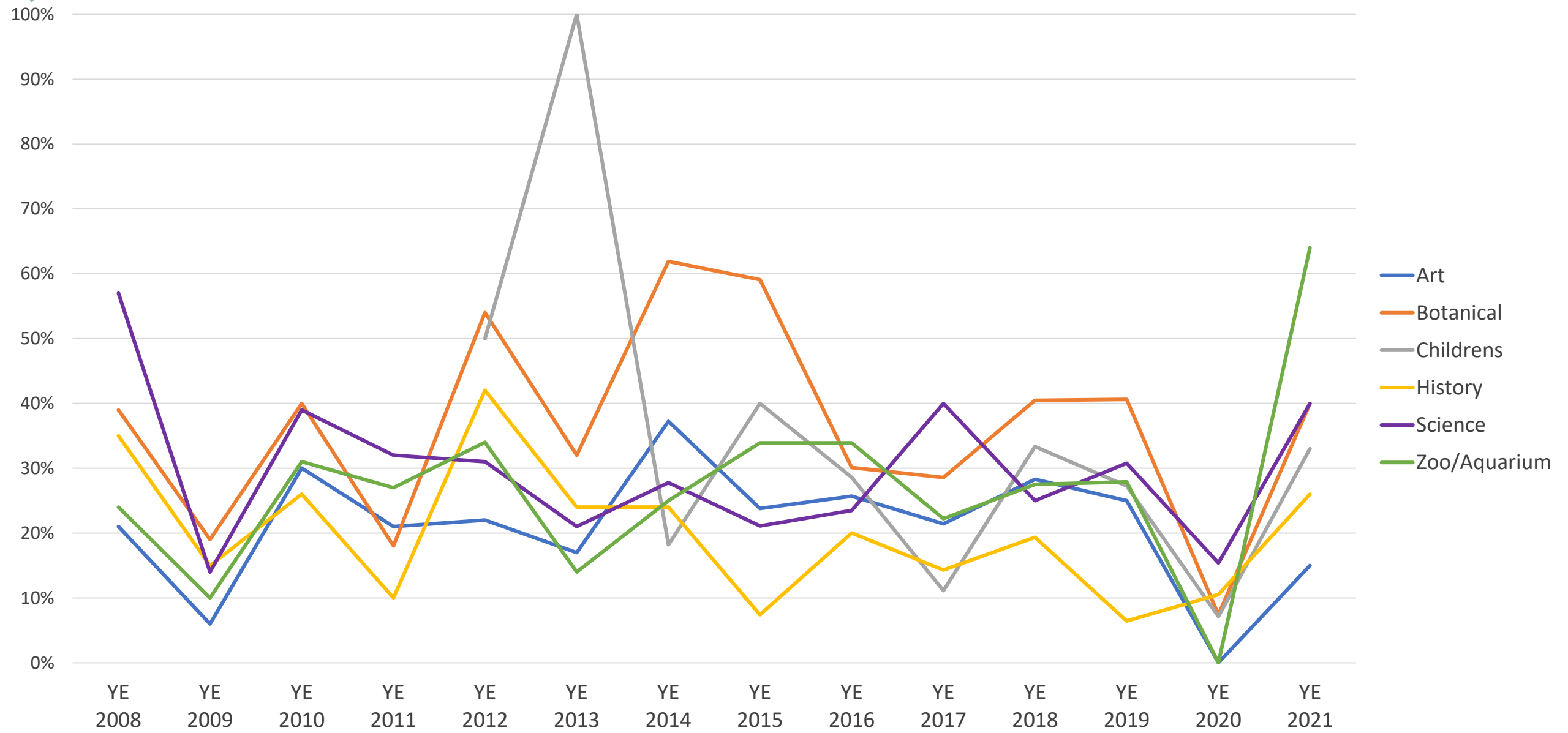


Increased Revenue over last year



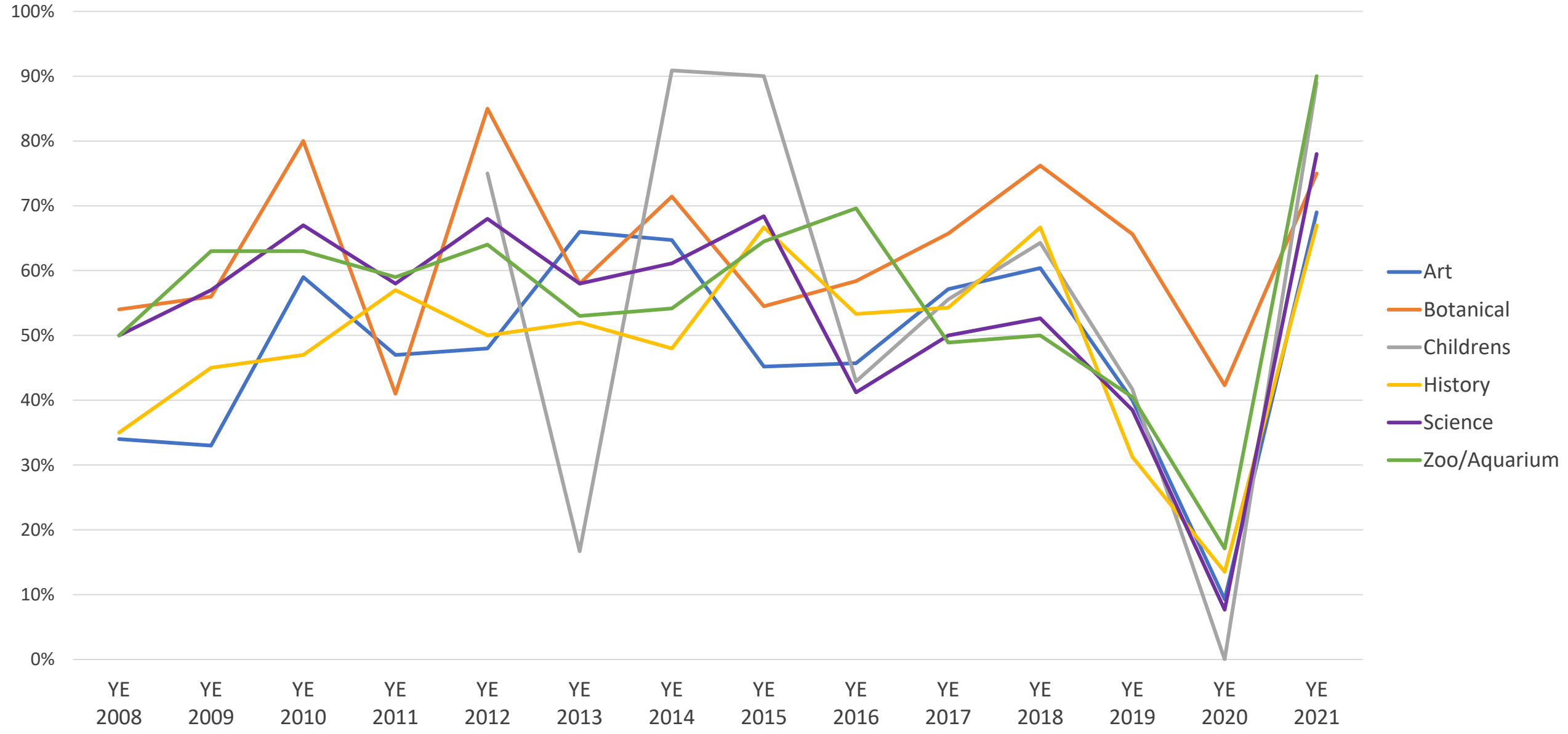


Budgets Increased over last year



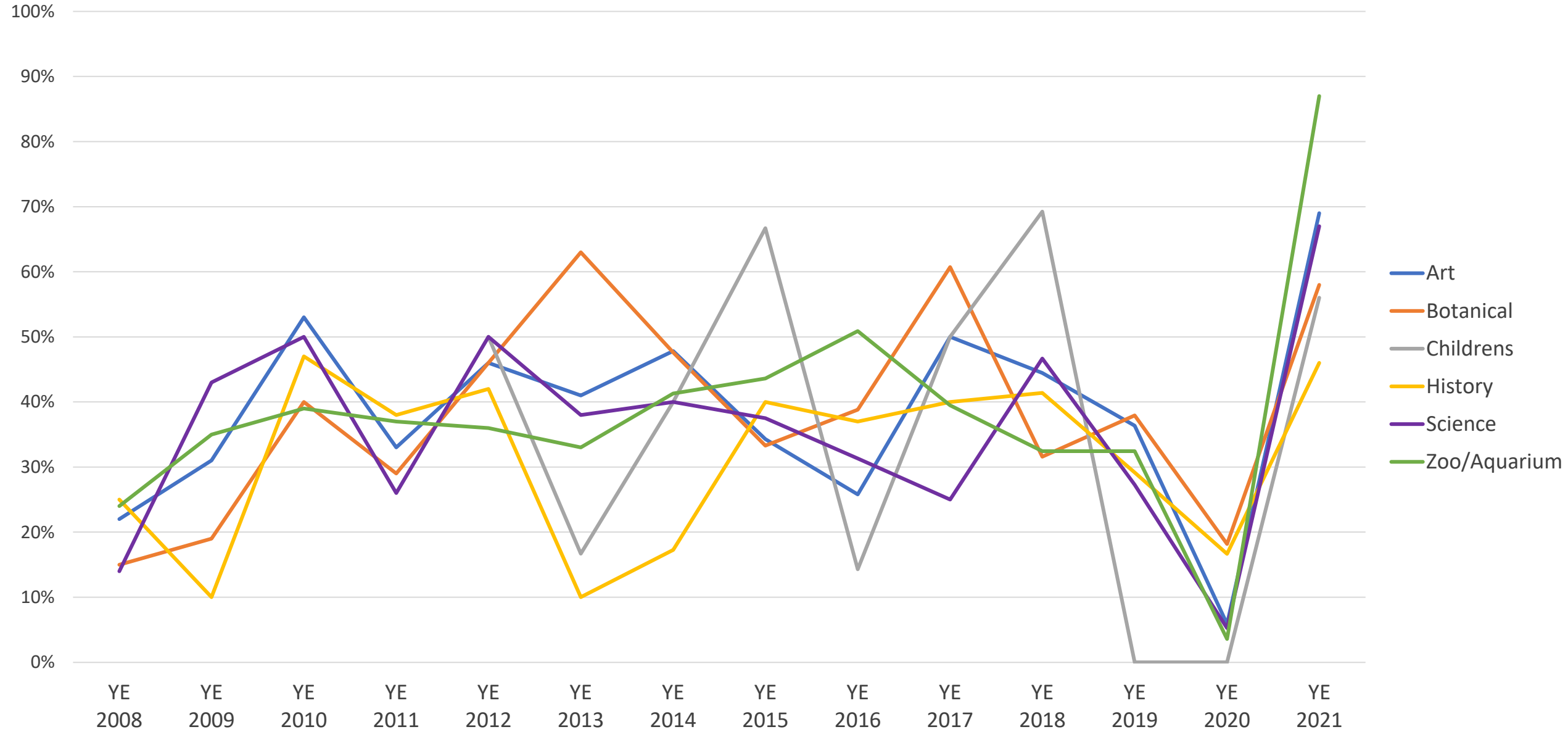


More new members this year than last year



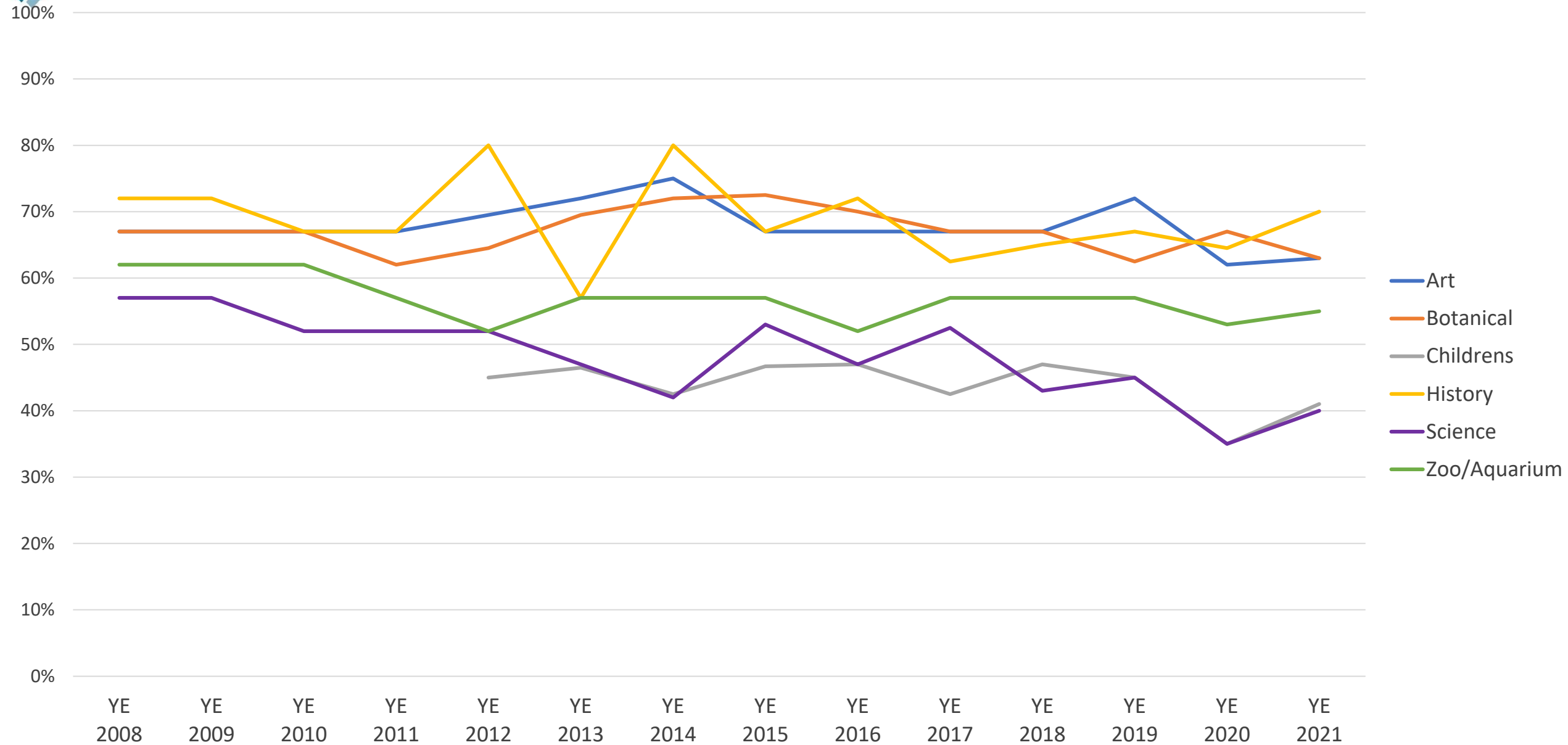


Renewal rates improved this year over last





Median Renewal Rate





Highlights – Zoos and Aquariums

Year-End 2021

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

Year-End 2020

- Reported *decrease*
 - 89% (93.5%) membership totals
 - 86.5% (97%) revenues
 - 67.5% (74%) expenditure budgets
 - 63% (83%) new members
 - 78% (83%) visitation
 - 82% (84%) renewals
- Median Renewal Rate = 52% (50%)



Highlights – Gardens and Arboreta

Year-End 2021

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

Year-End 2020

- Reported *decrease*
 - 52% (61.5%) membership totals
 - 44% (65.5%) revenues
 - 63% (60%) expenditure budgets
 - 35% (69%) new members
 - 59% (80%) visitation
 - 64% (43%) renewals
- Median Renewal Rate = 67% (63%)



Highlights – Art Museums

Year-End 2021

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

Year-End 2020

- Reported *decrease*
 - 95% (86%) membership totals
 - 79% (69.5%) revenues
 - 60% (53%) expenditure budgets
 - 86% (88%) new members
 - 91% (100%) visitation
 - 88% (70%) renewals
- Median Renewal Rate = 62% (65%)



Highlights – Science Museums

Year-End 2021

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

Year-End 2020

- Reported *decrease*
 - 95% (86%) membership totals
 - 79% (69.5%) revenues
 - 60% (53%) expenditure budgets
 - 86% (88%) new members
 - 91% (100%) visitation
 - 88% (70%) renewals
- Median Renewal Rate = 35% (43%)



Highlights – Children’s Museums

Year-End 2021

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

Year-End 2020

- Reported *decrease*
 - 93% (100%) membership totals
 - 100% (100%) revenues
 - 64% (90%) expenditure budgets
 - 100% (82%) new members
 - 92% (100%) visitation
 - 100% (89%) renewals
- Median Renewal Rate = 35% (40%)



Highlights – History Museums

Year-End 2021

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

Year-End 2020

- Reported *decrease*
 - 74% (71.5%) membership totals
 - 74% (68%) revenues
 - 63% (50%) expenditure budgets
 - 76% (71.5%) new members
 - 90% (100%) visitation
 - 67% (66%) renewals
- Median Renewal Rate = 65% (53%)

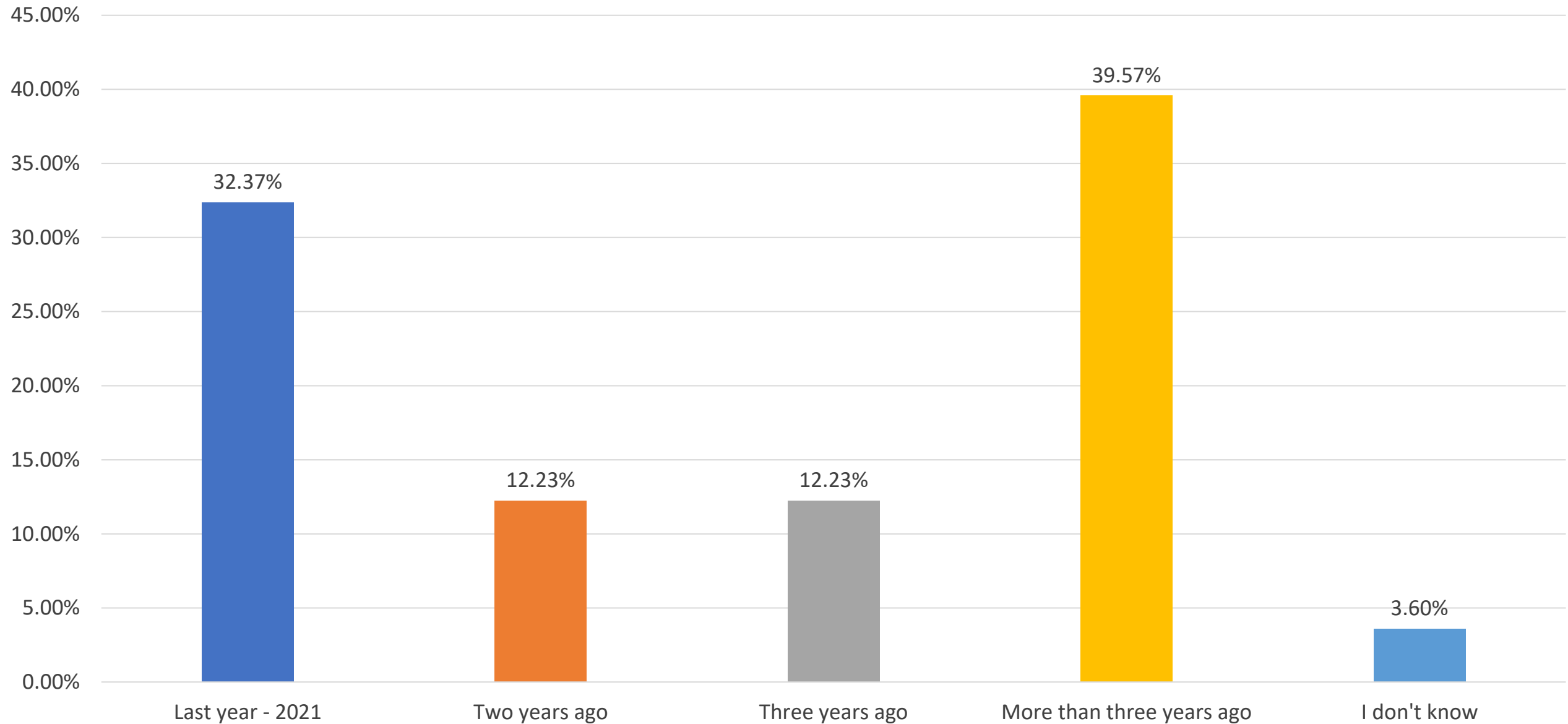


Dues, Categories and Benefits

Pulse 2021 Year-End Data

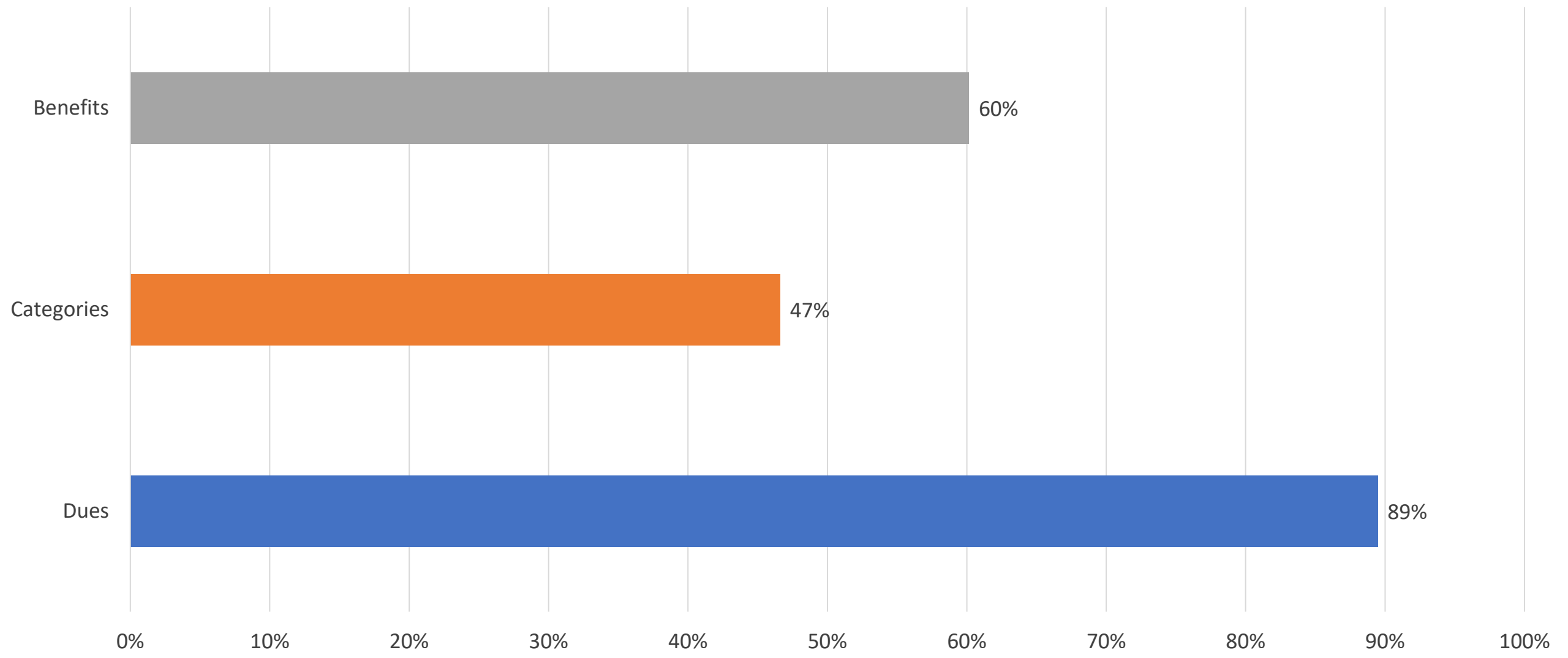


When was the last time your organization changed your dues, categories or benefit offerings?



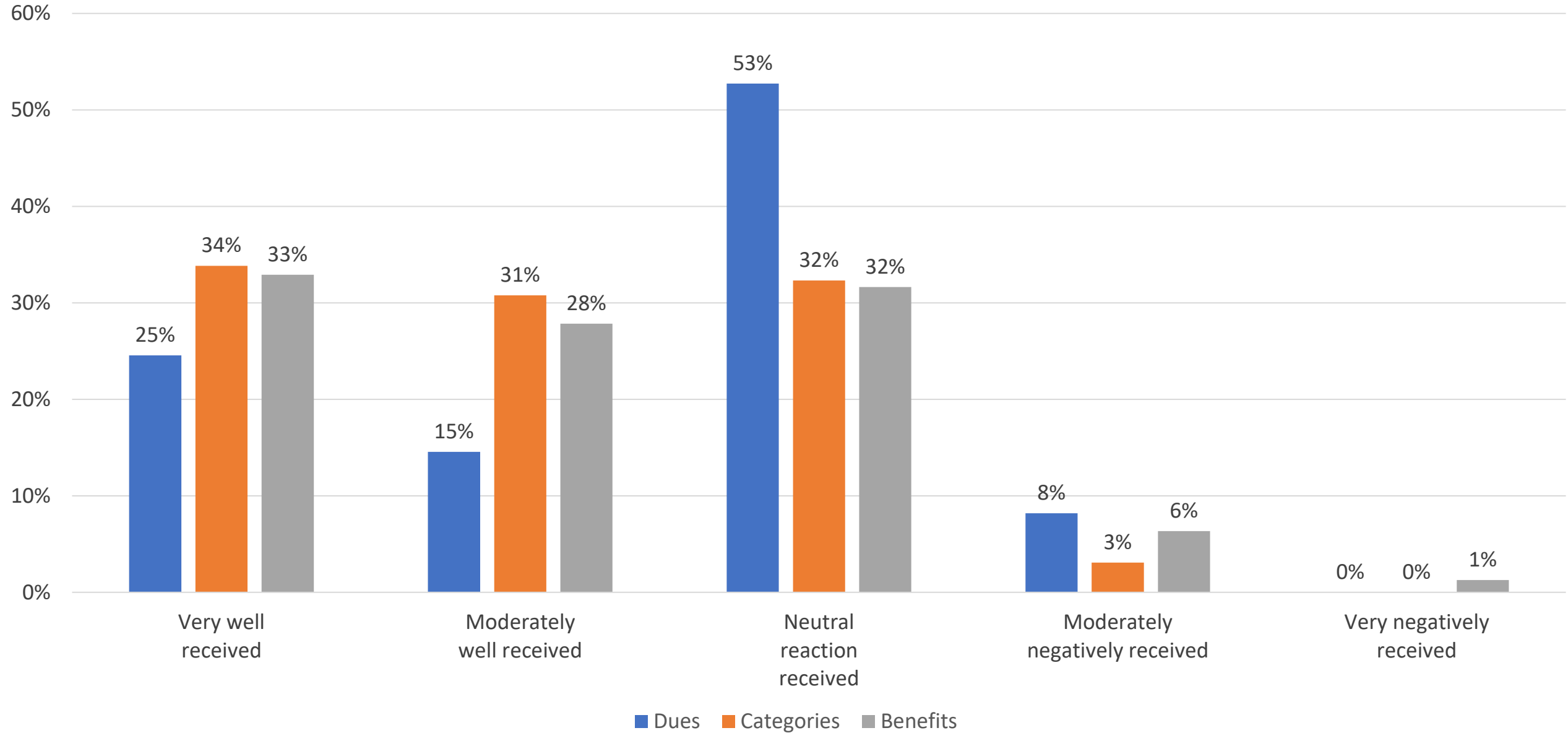


When you made these changes, what aspects did you change? (Check all that apply.)



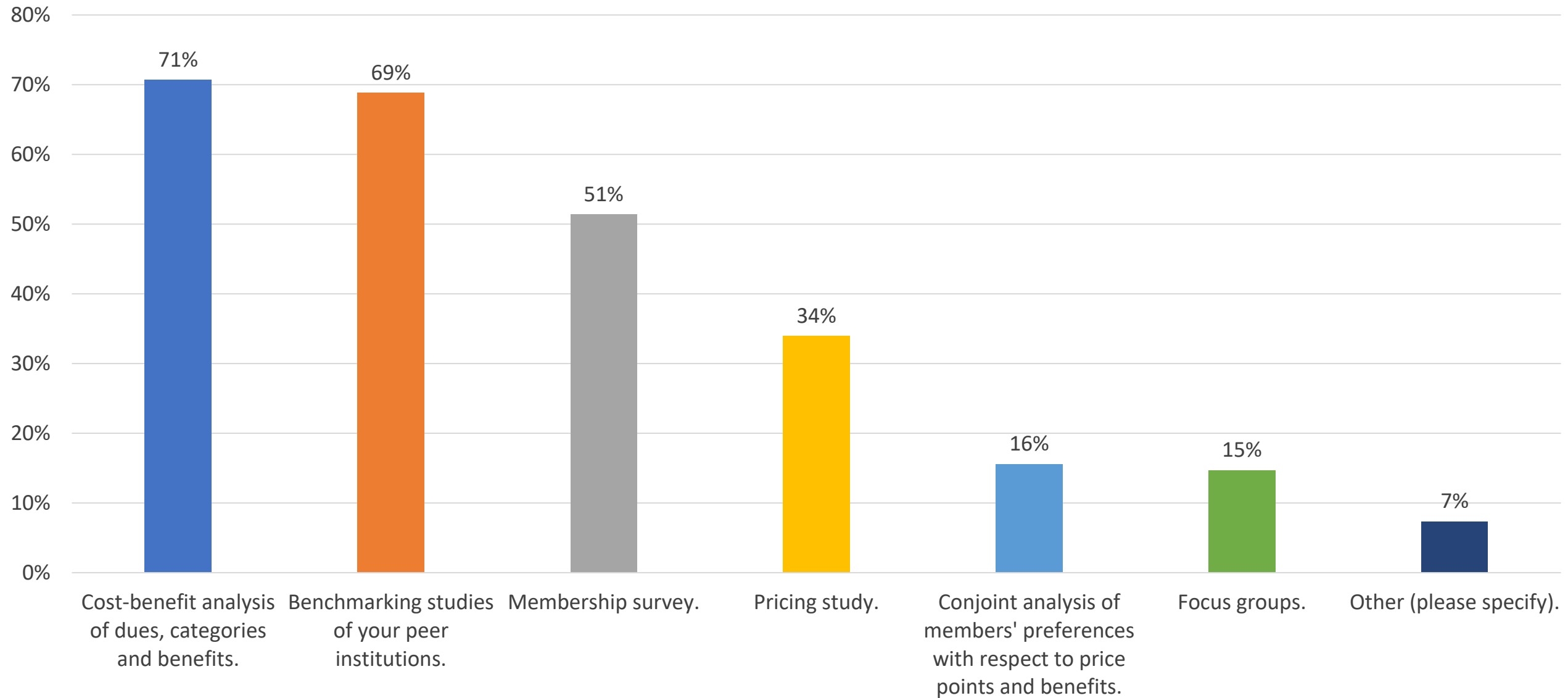


In changing dues, categories and/or benefits, how well were the changes received by your members?





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



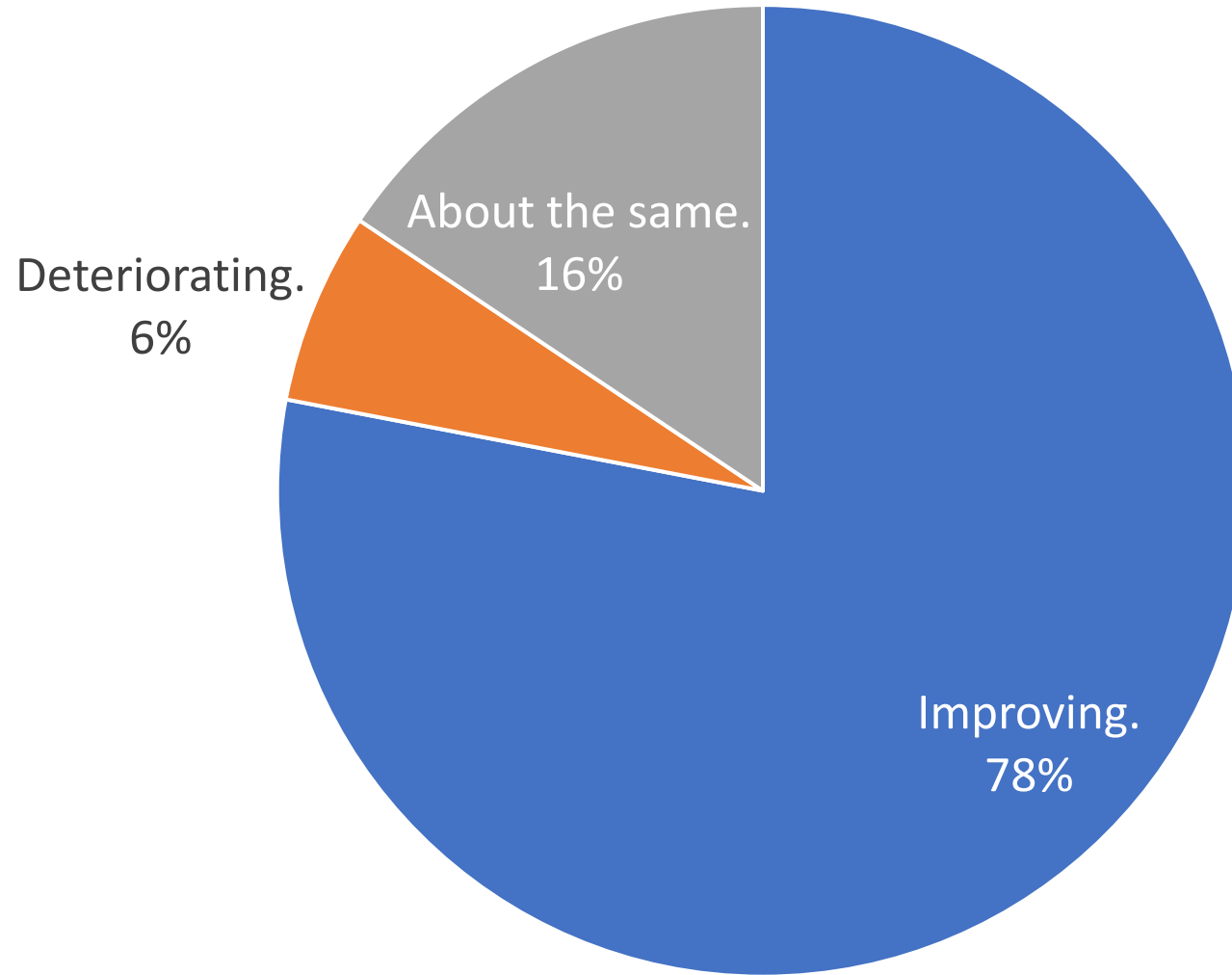


Membership Forward

Pulse 2021 Year-End Data

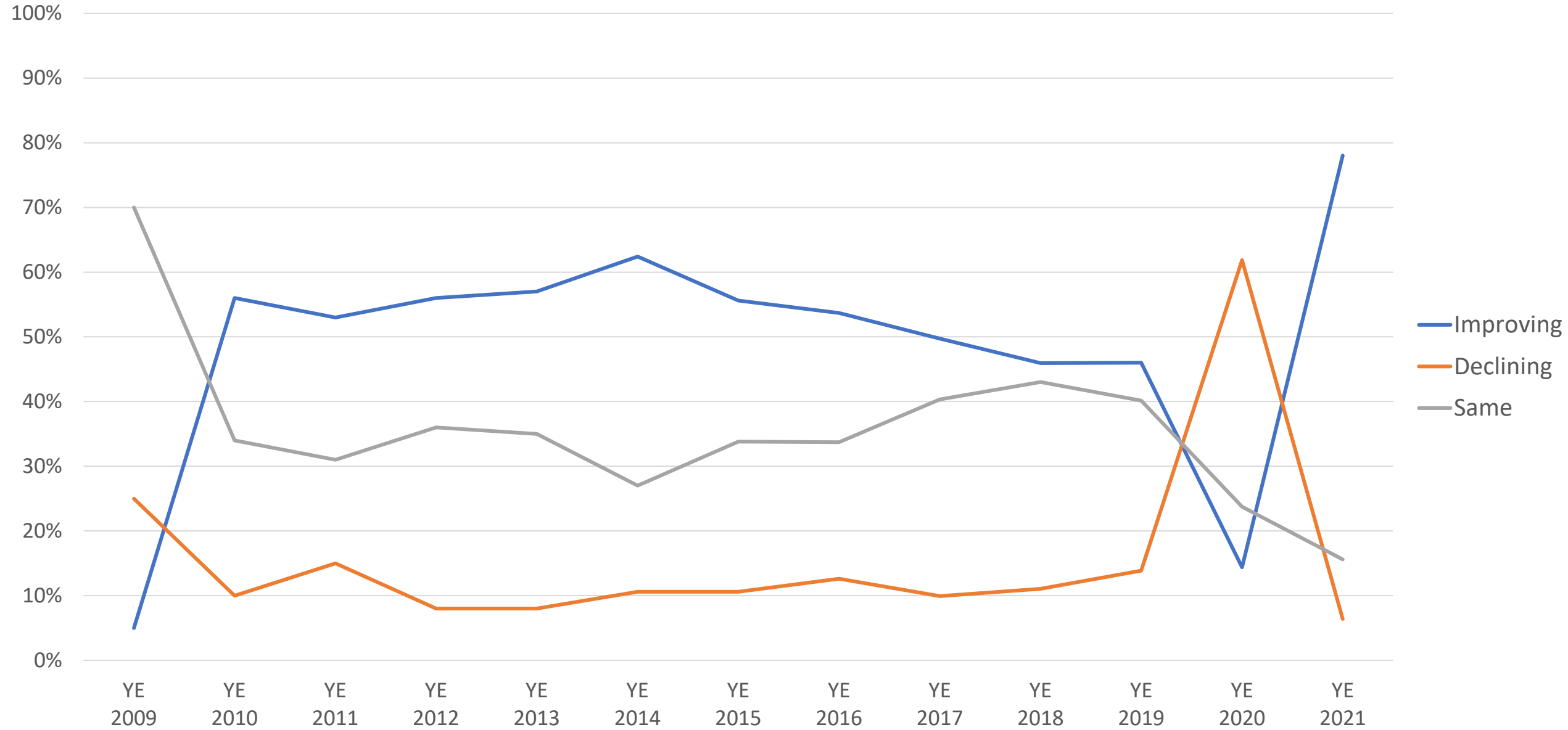


In your professional opinion, comparing 2021 to 2020, the membership climate is ...





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 ...

- 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**
AN OSG COMPANY

Questions?

Thank you!

info@membership-consultants.com

www.membership-consultants.com