

Campbell Rinker

Marketing Research for the Nonprofit World

Art Museum Membership Conference 2010
Attendee Survey

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Summary

The Art Museum Membership Conference 2010 partnered with research firm Campbell Rinker to conduct the 2010 Attendee Survey. Topics ranged from museum size and location to membership size, pricing, renewal rate, renewal practices, benefits and more. Approximately 160 registrants as of May 17th were invited to participate via e-mail in the online survey. The results below reflect the responses of 88 museum respondents. Detailed results and break-outs by museum type, active membership size and cost of adult admission are at the end of the report.

AMMC Attendees

- † This is the first year the conference was opened to all museums. Six in ten respondents (60%) represented Art Museums, 7% represented Gardens, another 7% represented Science Museums, and 13% categorized themselves as “other”, most of which were largely multi-focused museums.
- † For approximately half of all respondents (47%), AMMC 2010 is their first Art Museum Membership Conference. Previous AMMC attendees have been coming for an average of 4 years.
- † Similar proportions of respondents have been with their museum for 1 to 3 years (39%) or 4 to 9 years (38%). One in 10 (11%) have been with their museum for 10+ years.
- † Respondents have been in museum membership in general for a slightly longer period of time. Two in 10 (17%) have been in membership for 10+ years, and four in 10 (38%) have been in membership for 4 to 9 years.

Museum Location, Size, and Visitation

- † About half of the respondents (51%) work in museums with large metro populations of 1.5 million or more. Half (53%) also have about 10 or more other museums in their city.
- † Half of the museums represented have a local membership base (54%), and a third (35%) have a regional base.
- † Most respondents (42%) consider their museums to be medium, while a third (33%) describes their museum as large.
- † About a quarter of the museums represented (23%) have an active membership size of less than 2,500, while a little more than a quarter (28%) have between 2,500 to 9,999 active members. Fifteen percent of museums surveyed have active memberships of 50,000+.
- † Most museums represented (60%) have annual visitation of 150,000+. Only one in 10 (10%) have less than 50,000 visitors annually.

- † Two in 10 museums (21%) offer free adult admission. About half (49%) offer admission between \$10 and \$19.99.

Membership Categories and Prices

- † Most museums have seven or more membership categories (79%), with nearly four in 10 (37%) having 10 or more categories.
 - The typical cost of the most populated membership is between \$50 and \$99.99.
 - For six in 10 museums (63%), the lowest membership level starts at under \$50.
 - For more than half of the museums (51%), upper level membership begins at \$1000+.
 - Six in 10 museums represented (62%) report their highest membership level price at \$10,000+.
- † Most museums (40%) report that they rarely increase their membership prices, while similar proportions increase the prices every two to three years (24%) or every four to five years (24%).
- † Three-quarters of the museums represented (77%) have not raised their prices in the last 12 months. Art museums are less likely than other types of museums to have raised prices in the past year.
- † Two in 10 (20%) plan to raise prices in the next 12 months, while three in 10 (31%) are not sure.

Membership Budget

- † One in three museums represented (32%) receive \$1 million to less than \$5 million annually in gross revenue from their membership program. A quarter (26%) receives \$250,000 to less than \$1 million in revenue, and another quarter (23%) receives less than \$250,000.
- † Four in ten museums (40%) report an increase in gross revenue from last year. Three in ten (31%) report a decrease and 23% say revenue has stayed the same.
- † For more than half of all respondents (54%) membership revenue provides 5%-25% of the overall funds for their institution.
- † Six in ten museums (61%) report annual membership expense budgets of less than \$500,000 per year: 30% report a budget of less than \$100,000 and 31% report a budget between \$100,000 and \$499,999.
- † Four in ten (42%) say their expense budget has decreased since last year. Thirty-five percent say their budget has stayed the same.
- † Membership income supports operations for 85% of responding museums. For over half, membership income also supports education/outreach (58%) and exhibitions (53%).

- † In terms of membership expenses,
 - 73% of museums cover all of the membership staff expenses
 - 63% cover all mailing expenses
 - 53% cover all event expenses
 - 36% cover all magazine or newsletter expenses
 - 36% cover all donor/member database expenses, and
 - 29% cover all overhead expenses
- † Almost three-quarters of museums represented (73%) have staff of 5 or fewer: 43% have just one to two paid staff members and 30% have three to five paid membership staff. Most museums (69%) say their membership staff size has stayed the same since last year.
- † One in three museums (32%) have no paid on-site sales staff. Of those that do, most pay less than \$12 an hour.
- † Six in 10 museums (62%) do not pay commission for on-site sales.

Membership Renewals

- † The average renewal gift is generally between \$50 and \$124.99. One in four (25%) report renewal gifts of \$50 to less than \$75, 21% report gifts of \$75 to less than \$100, and 23% report gifts of \$100 to less than \$125.
- † The average overall renewal rate is between 50% and 79%, with 69% of respondents reporting renewal rates within this range. For nearly four in ten (37%) the renewal rate is 60% to 69%.
- † Three in ten (30%) say their renewal rate has increased in the last year, another 30% say it has remained the same, and 27% say it has decreased.
- † Nearly one in three respondents (32%) are unaware of the renewal rate for their first year members. Thirty-five percent are also unsure of the renewal rate for 2+ year members.
- † Most museums represented (81%) send between 3 and 5 renewal notices.
- † Six in ten (61%) use a combination of e-mail and paper mail notices. Nearly four in ten (38%) also use telemarketing.
- † Less than half (45%) offer premiums with renewals. A third (36%) offers discounts with renewals.

New Member Acquisitions

- † Three in four museums (73%) sell memberships on-site through visitor services, more than half (56%) sell memberships in their shop and 44% sell memberships via paid sales staff.

- † One in three museums (34%) have one member acquisition campaign annually. One in four (25%) have two member acquisition campaigns each year, and less than one in 10 (8%) have 5 or more campaigns.
- † A third of museums (33%) send less than 50,000 acquisition mailings annually, while three in 10 (29%) send between 50,000 to less than 250,000 mailings.
- † The average mailing quantity for half of these museums (52%) is less than 50,000 pieces. Three in 10 (30%) send 100,000+ pieces on average.
- † Most museums (38%) report the volume of their acquisition mailings decreased over the past year, while three in ten (31%) say it stayed the same.
- † Three in ten respondents (29%) are unsure of the response rate they receive from acquisition mailings. Almost half (46%) report response rates of less than 1.00%.
- † More than half (56%) do not split their mailing for testing.
- † Almost six in ten (57%) offer a membership discount in their acquisition mailings. A similar proportion (58%) offer intangible benefits and four in ten (43%) offer tangible benefits for those who join at a certain level.
- † The average gift in acquisition among responding museums is between \$50 and \$99.99. One in four (24%) give \$50 to less than \$75 and twenty-six percent give \$75 to less than \$100.

Member Appeals and Acknowledgements

- † Most museums send send lapsed/re-join appeals (86%) and annual fund appeals (81%). Six in ten (59%) also send upgrade appeals to their members.
- † Approximately half of the museums (48%) send one to two special appeals throughout the year. Another third (34%) send three to five special appeals.
- † The typical acknowledgment letter is produced in-house (81%) and sent out weekly (56%) in response to gifts at the \$500 and above level (56%). The typical signers are museum directors (60%) and membership directors (54%).

Websites and E-mail

- † Nine in 10 (92%) allow members to join or renew on their website.
- † Nearly six in 10 (57%) use e-mail to send renewal notices and almost all respondents (98%) say they use e-mail renewal notices in conjunction with direct mail renewal notices.
- † Most museums publish an e-newsletter (94%) and do so on a monthly basis (56%).

- † Email appeals are largely used for renewals (57%), new member acquisition (47%), annual fund (47%), and lapsed/re-join campaigns (43%).
- † Nearly all responding museums (96%) have a presence on Facebook and 75% have a presence on Twitter.

Exhibitions, Special Events, and Receptions

- † More than half of the museums (53%) normally host one “blockbuster” exhibition annually. Fifty-six percent do not surcharge major exhibitions. One in four (27%) do surcharge major exhibitions, but not for members.
- † One in four respondents (25%) report having three to five events/receptions each year. Approximately three in ten (28%) hold six to ten events and 20% hold eleven to fifteen events annually.
- † Most museums (70%) have not cut back on the number of special events offered in the last year.
- † Over seven in ten (72%) offer special events and receptions at no cost.

Member Benefits

- † The most commonly offered tangible benefits are museum newsletters (63%), museum magazines (54%), calendars of events (53%), exhibition tickets (41%), and exhibition catalogs (38%).
- † Among the most commonly offered intangible benefits are discounts in the museum shop (95%), reciprocal membership (87%), free admission (86%), and discounts in the museum restaurant (61%).
- † Over six in ten museums (63%) report their benefit offers remaining the same over the past year.
- † More than eight in ten (82%) offer free member programming such as tours, lectures, concerts, and films.
- † Most museums (84%) belong to a reciprocal membership program: 42% belong to more than one reciprocal membership program and another 42% belong to just one reciprocal membership program.
- † Seven in 10 museums (70%) offer reciprocal membership privileges at the \$100+ price level. One in four (26%) provide reciprocal membership at all price levels.

Tabulations

About Campbell Rinker

Campbell Rinker is recognized as a leader in producing quality marketing research for museums, universities, and other nonprofits. The full-service firm specializes in conducting research among donors, members, and alumni and is a pioneer in using trade-off analysis to understand the value members assign to membership benefits and build forecasts based on the results.

The firm brings core values to each project it delivers. The results are usable and concrete; not lofty and theoretical. The findings are interpreted with care and precision, giving clients confidence that their decisions will result in the best possible marketing direction. And, as members of the MRA and CASRO, Campbell Rinker follows a code of ethics designed to set an example for others in the research community.

Selected Campbell Rinker Staff Biographies

Dirk Rinker succeeded founder Bruce Campbell as the owner of the firm in December, 2003. He joined the firm in early 1999. He has been active in the field of nonprofit direct marketing analysis, research, and fundraising since 1983. During his tenure with Campbell Rinker, the firm has produced research and analysis for nonprofit clients as diverse as Mercy Corps, American Heart Association, Catholic Relief Services, American Red Cross, University of Michigan, Project HOPE, The Carter Center, Houston Grand Opera, Save the Children, UCLA School of Law, Arthritis Foundation, World Vision, and hundreds of other nonprofits around the country. Dirk earned a B. A. in Advertising with Distinction from San Jose State University.

Jim McGee, Vice President and Southeast Asia Director, leads many of Campbell Rinker's efforts to adapt leading-edge quantitative research methods to the nonprofit sector. In his work for Campbell Rinker, he has aided clients such as the Alumni Association of the University of Michigan, the Corcoran Gallery of Art in Washington D.C., Seattle Art Museum, the University of Iowa, and the Arthritis Foundation. Jim holds an M.S. degree in Marketing Research from the University of Texas at Arlington. He has worked with Campbell Rinker since 2000.

Jennifer Spencer, Director of Custom Research, has been with Campbell Rinker since 1995 and has served in her current position since 2003. During her tenure at the firm, Jennifer has worked with nearly every client in some capacity, including managing projects for the American Red Cross, the Japanese American National Museum, the Museum of Modern Art, Campus Crusade for Christ, Winterthur Museum & Country Estate, the Salvation Army, and Museum of Fine Arts, Boston among many others. Jennifer also oversees all Campbell Rinker's data analytics. She graduated summa cum laude from Biola University with a B. A. in Psychology. Jennifer is a member of the Market Research Association (MRA) and the Council of American Survey Research Organizations (CASRO).

Capabilities

When you select Campbell Rinker as your research partner, you receive our experience, our professionalism, and much more...

- † *A deep understanding of opinions and attitudes among donors, members and alumni*
- † *State-of-the-art calling centers featuring computer-aided telephone interviewing software*
- † *Interviewers trained in the art and science of donor and member interviews,*
- † *Remote silent monitoring for interview quality control,*
- † *Live pre-testing of all survey instruments,*
- † *SurveySystem™ software for cross-tabulations and banners,*
- † *SPSS™ and Sawtooth™ software fully-optimized for advanced analyses,*
- † *Proprietary Campbell Rinker software for database analyses,*
- † *Full-color reports suitable for boardroom presentations,*
- † *Optional, on-site presentation of research results and implications.*



Market Expertise

Campbell Rinker has experience with a wide range of research areas, demonstrating an ability to meet the needs of varied clientele.

- † *Membership Engagement*
- † *Donor Engagement*
- † *Alumni Engagement*
- † *Nonprofits and Fundraising*
- † *Civic and Governmental*
- † *Publishing and Broadcasting*
- † *Software*
- † *Tourism*

Research Expertise

Campbell Rinker is a full-service research agency, offering a complete array of research tools. We tailor our use of proven, innovative research techniques to deliver results to fulfill your specific objectives.

Satisfaction Research

- † *DASHtrack™ satisfaction system*

Custom Research & Analysis

- † *Live or Online Focus Groups*
- † *In-person interviews*
- † *Surveys by Internet, mail and phone*
- † *Conjoint Analysis and Modeling*
- † *Donor Value ModelingSM*
- † *Perceptual Mapping*
- † *Segmentation Analysis*
- † *Gift Sensitivity MeterSM*

Data Analytics

- † *Donor Performance Analysis*
- † *Member Performance Analysis*
- † *Life Time Value Analysis*
- † *Event Analysis*

Research Reports

- † *DonorPulseSM studies of donor attitudes, awareness and giving by sector*
- † *Donor & Member Software*
- † *NonProfit Accounting Software*
- † *NonProfit Consulting*
- † *Home School Curriculum*

Selected Clients

Advocacy

American Center for Law and Justice
American Scottish Foundation
Evangelical Development Ministries
Massachusetts SPCA
Presbyterian Lay Committee
Prison Fellowship
Voice of America
Wildlife Conservation Society

Arts

Corcoran Gallery of Art
Detroit Institute of Arts
Houston Grand Opera
Japanese American National Museum
Museum of Fine Arts, Boston
Museum of Modern Art
Museum of New Mexico Foundation
San Francisco Symphony Orchestra
Santa Fe International Folk Ark Market
Seattle Art Museum
Winterthur Museum & Country Estate

Education

Belmont Abbey College
Biola University
Bridgewater College
Bucknell University
California State University System
Clarkson University
Centennial College
Chicago Theological Seminary
Fordham University
Loyola Univ. of New Orleans
Meharry Medical College
Oral Roberts University
Phillips Academy Andover
Saint Mary's College (TX)
St. Mary's University
State University of New York

Summit Country Day School
Tiger Woods Foundation
UCLA External Affairs
The UCLA Fund
UCLA School of Law
University of Michigan College of Engineering
University of Pittsburgh
University of South Carolina
Western Governors University

Health and Hospital

ALS Association
Alzheimer's Association
American Heart Association
Arthritis Foundation
Children's Medical Center of Dallas
Little Company of Mary Hospital
MD Anderson Cancer Center
National Easter Seals
National Jewish Medical and Research Center
St. Jude Children's Research Hospital

International

American Red Cross
CARE
Catholic Medical Mission Board
ChildReach / Plan International
Compassion International
Food for the Hungry
Habitat for Humanity, Int'l
Heifer, International
Int'l Service Agencies
Latin American Childcare
Mercy Corps
Opportunity International
Project HOPE
Save the Children
The Carter Center
UNICEF
Voice of America
World Emergency Relief
World Witness

Membership

Alpha Beta Tau

Alumni Association of the University of Michigan
American Zoological Association
Binder Park Zoo
Boy Scouts of America
Brooklyn Botanical Gardens
California Society of CPAs
Fort Worth Museum of Science and History
International Code Council
Monterey Bay Aquarium
National Athletic Trainers' Association
National Catholic Development Conference
Point Defiance Zoo and Aquarium
University of Iowa Alumni Association

Social Service

Boy Scouts of America
Lutheran Social Services
Martin Luther Home
Methodist Children's Home
Salvation Army
Teen Challenge
The Bowery Mission
Union Rescue Mission
United Way of Greater Los Angeles

Partial list, some served through agencies