

DANILLER + COMPANY

Market Trends and Membership

AMMC
April 11, 2016 | Chicago

Presenters



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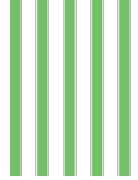
Overview of Session

- The world has changed forever
- Important business and societal trends
- Giving is up, especially for arts and culture
- What are the charitable habits of different generational groups?
- Hot topics are video, big data, and ethics/regulation
- What does this new world mean for membership in 2016?

How has the World Changed Forever?



- The world population has more than doubled in the past 50 years
- The percent of people over 65 is 14% in the US, higher than ever and growing
- There are more people migrating than ever before – 232MM per year, up from 175MM in 2000
- More than half the global population is urban
- 2.6B smart phone users worldwide
- 280 million in the US (of 400 million mobile)

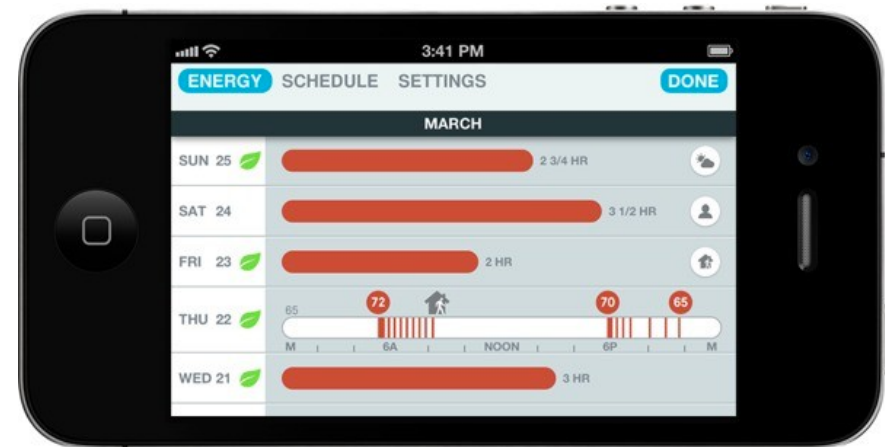


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Business and Societal Trends

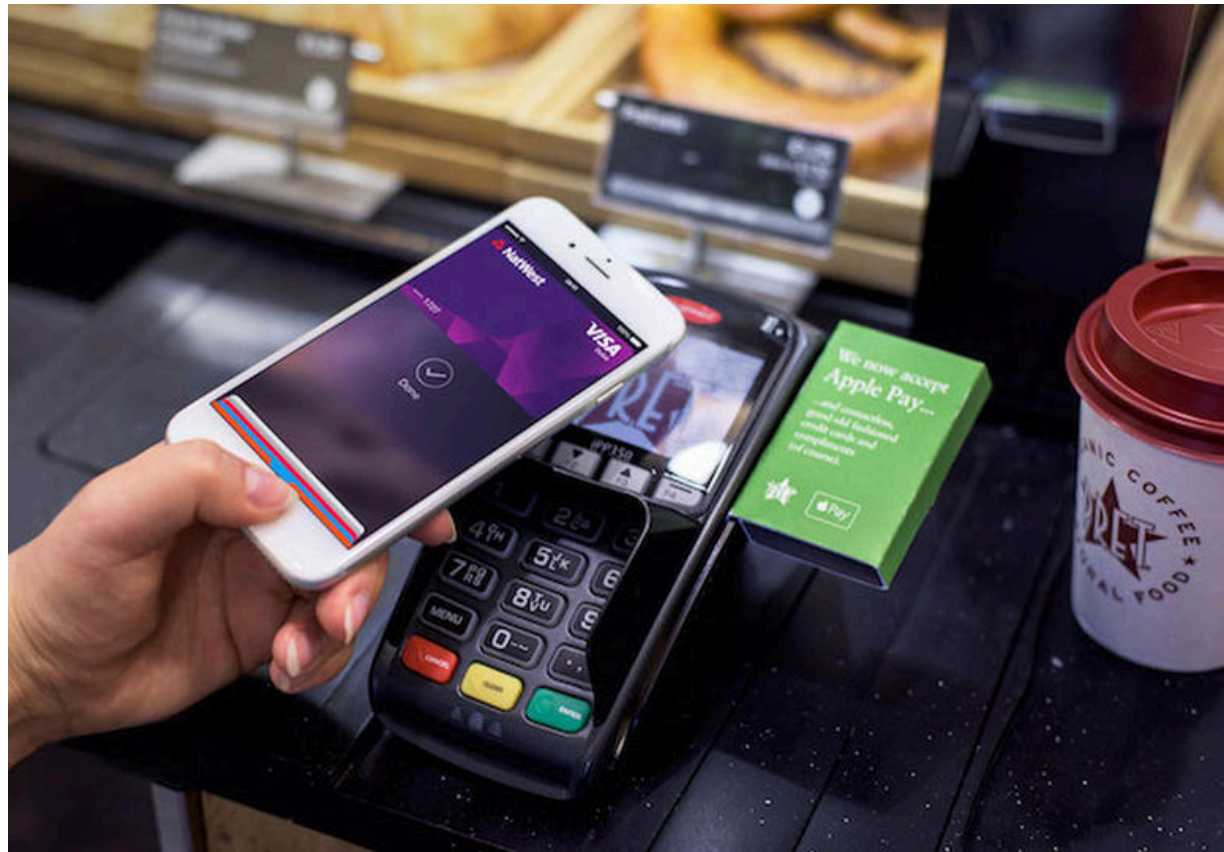
Business and Societal Trends

Internet of Things



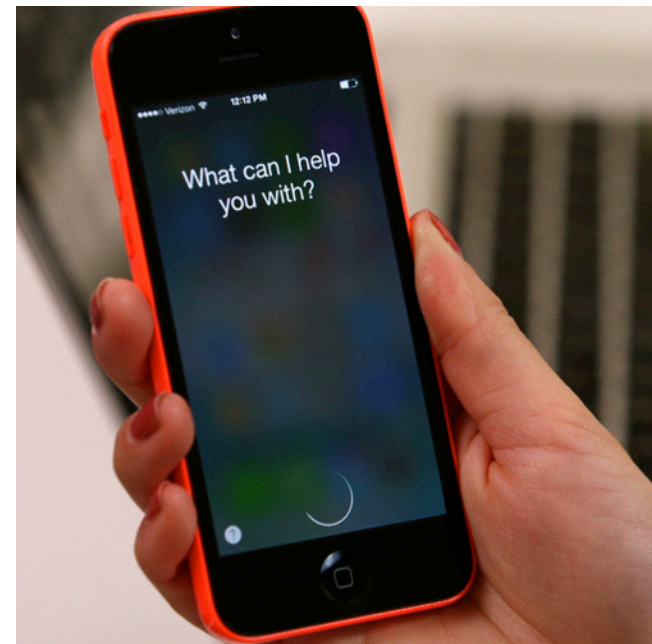
Business and Societal Trends

Mobile payment



Business and Societal Trends

More natural tech interface



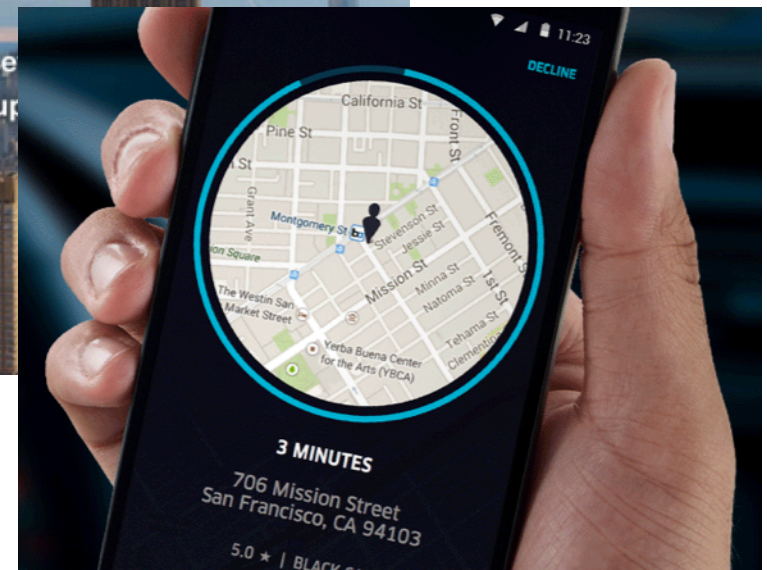
Business and Societal Trends

Virtual/augmented reality



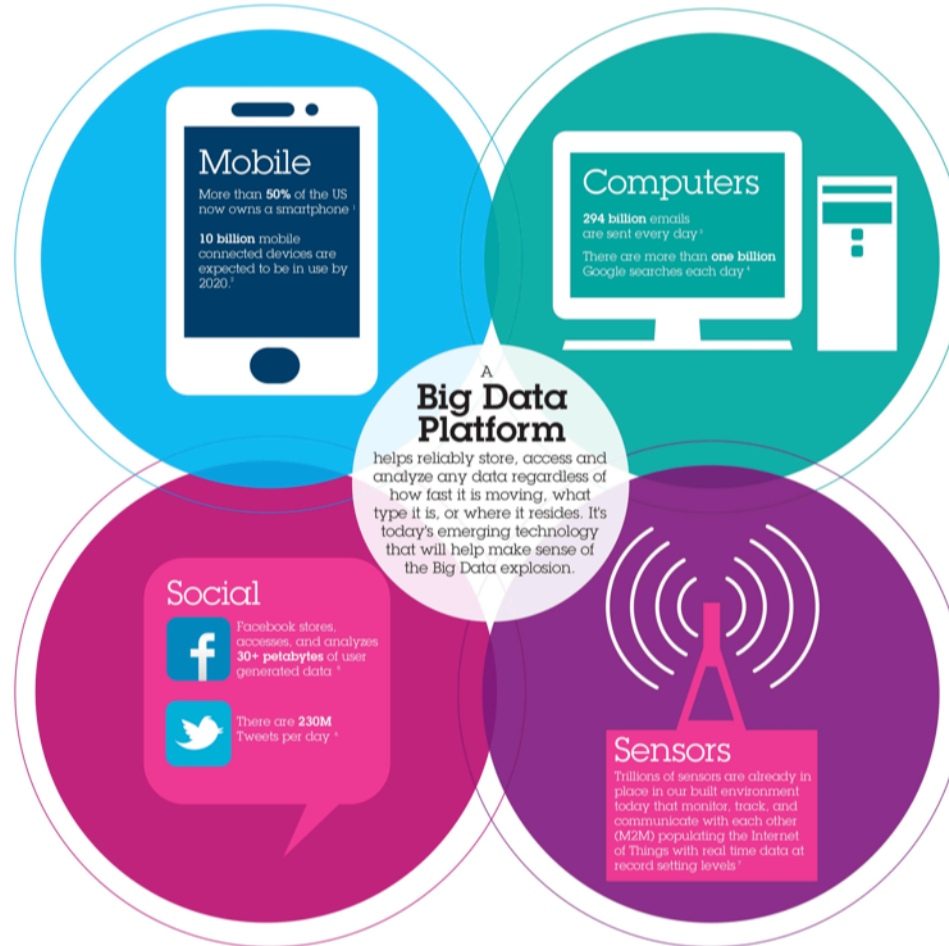
Business and Societal Trends

Sharing economy



Business and Societal Trends

Big data



Business and Societal Trends

Big data hacks



Business and Societal Trends

Streaming and user-generated video



Business and Societal Trends

Premium paid content

The screenshot shows a list of apps under the 'Free' tab. The apps are ranked 1 through 4. Each app entry includes a number, the app icon, the app name, the category 'Entertainment', a star rating with the number of reviews, and a button to 'GET' or 'OPEN' the app. The 'GET' buttons indicate that these apps are available for purchase within the app.

Rank	App Name	Category	Rating	Reviews	Action
1	KYLIE Kylie Jenner Official App	Entertainment	★★★★☆	(729)	+ GET (In-App Purchases)
2	KHLOÉ Khloé Kardashian Official App	Entertainment	★★★★☆	(124)	+ OPEN
3	f.kim Kim Kardashian West Official App	Entertainment	★★★★☆	(152)	+ GET (In-App Purchases)
4	KENDALL Kendall Jenner Official App	Entertainment	★★★★☆	(50)	+ GET (In-App Purchases)

The screenshot shows a web browser displaying a New York Times article. The article title is "How Not to Explain Success" and the author is "Gray Matter". The article text discusses a study on success and cognitive abilities. A paywall overlay is visible at the bottom of the article, offering a 4-week trial for 99¢. The overlay includes the New York Times logo and the text "Real news deserves real journalism." and "START NOW".

www.nytimes.com/2016/04/10/opinion/sunday/how-not-to-explain-success.html?action=click&pgtype=Ho...
SundayReview | How Not to Explain Success

evidence.

Rather than join the fray when the topic was hot but nobody seemed to have anything definitive to say, we took the time to empirically test the triple package hypothesis directly. [Our results have just been published](#) in the journal Personality and Individual Differences. We found scant evidence for Professors Chua and Rubenfeld's theory.

We conducted two online surveys of a total of 1,258 adults in the United States. Each participant completed a variety of standard questionnaires to measure his or her impulsiveness, ethnocentrism and personal insecurity. (Professors Chua and Rubenfeld describe insecurity as "a goading anxiety about oneself and one's place in society." Since this concept was the most complex and counterintuitive element of their theory, we measured it several different ways, each of which captured a slightly different aspect.)

Next, the participants completed a test of their cognitive abilities. Then they reported their income, occupation, education and other achievements, such as receiving artistic, athletic or leadership awards, all of which we combined to give each person a single score for overall

FROM OUR ADVERTISERS

- TANIUM: How Many Devices Do You Use? Discover why each device creates a door to intruders.
- EMBASSY OF JAPAN: Finding the Best Blossoms Where to find a cherry blossom festival near you.
- TOYOTA: Hacking World Hunger This woman's app has helped feed more than 660,000 people.

Gray Matter

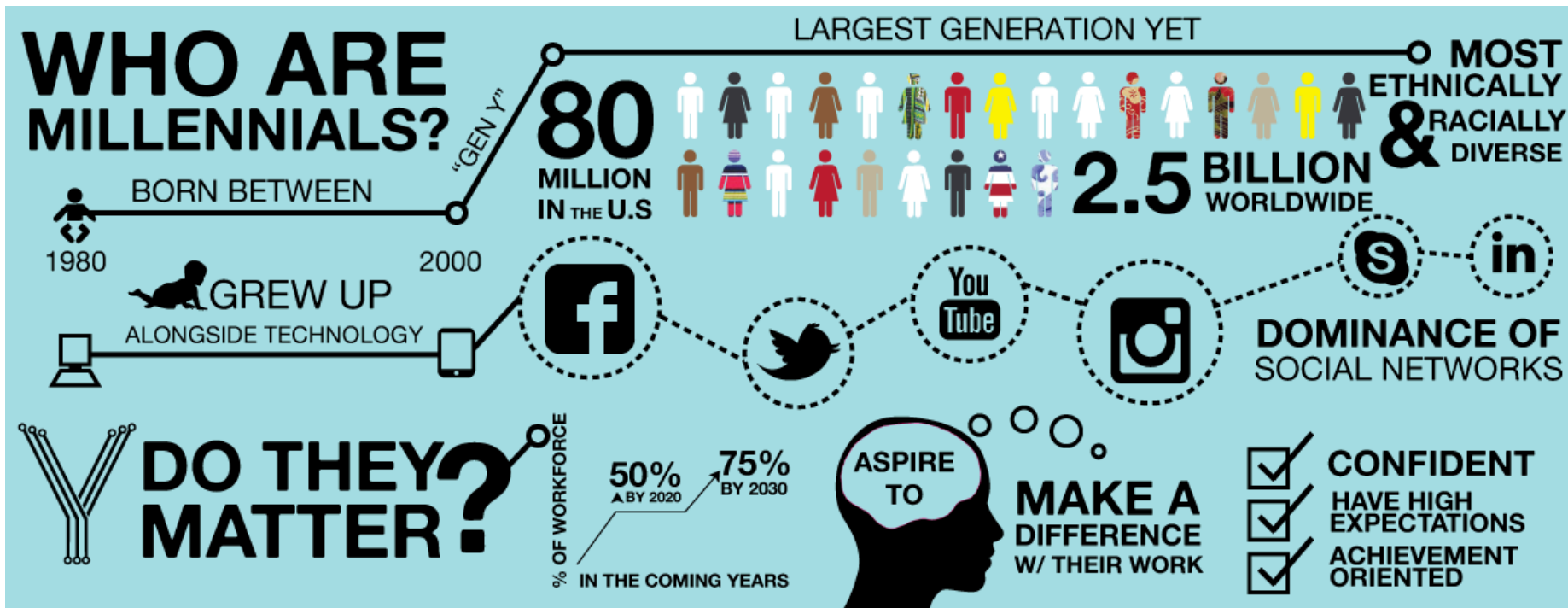
Get 4 weeks of The Times. Just 99¢. ALREADY A SUBSCRIBER? LOG IN

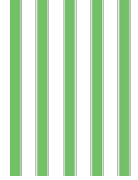
The New York Times | Get 4 weeks of The Times. Just 99¢. | Real news deserves real journalism. | START NOW

What is it: Offering some info for free, and some info only for paid users. Often free content is provided to attract people to paid content.

Business and Societal Trends

Millennials becoming homeowners and parents!





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U.S. Giving Trends

U.S. Giving Trends in 2014

- Total giving rose 5.4%
- Individual giving (72% of giving) rose 4%
- Giving was up across all sectors except International Affairs
- Arts, Culture, and Humanities grew more than any other sector – at 7.4%, now back to pre-2008 recession dollars
- Blackbaud's 2015 Charitable Giving Report, not as comprehensive, has Arts and Culture growing at 0.5% in 2015



U.S. Direct Marketing Giving Trends

- Since 2010, donor counts down 12.5%, and new donor counts down 17.6%! Overall revenue is flat.

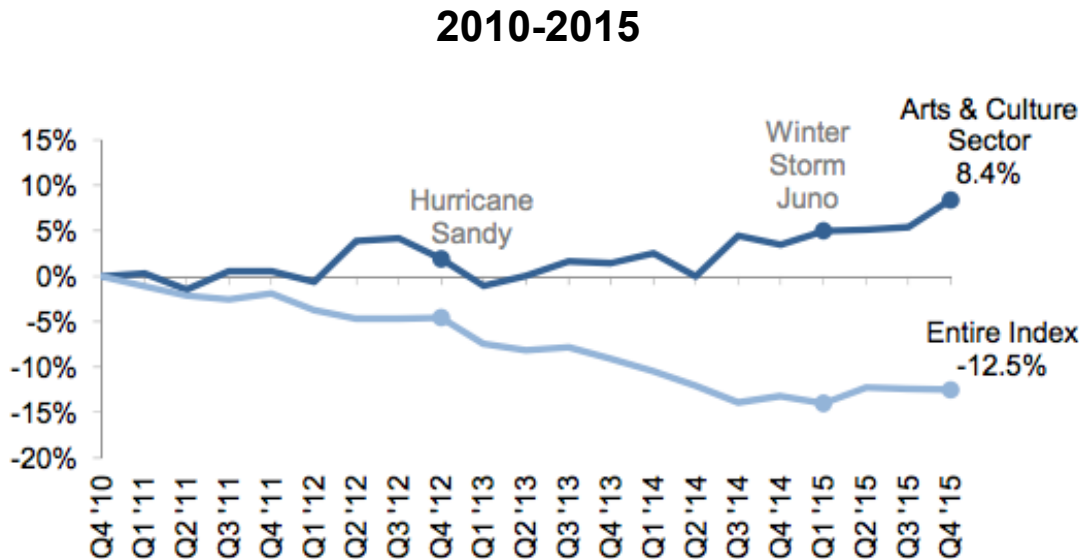
2015 vs 2014:

- **New donors down 2.6%**
- **Retention up 0.4%**
- **Revenue per donor up 3.7%**
 - May reflect higher mix of long-term donors
- **Revenue up 1.3%**
 - Finally back to pre-recession numbers, but not when adjusted for inflation!



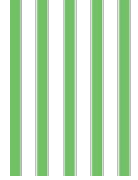
U.S. Direct Marketing Giving Trends

- **Arts and culture sector** donor counts up 8.4% since 2010



Arts and Culture 2015 vs 2014:

- Donor counts up 3% and revenue up 3.6%
- New donors up 31%

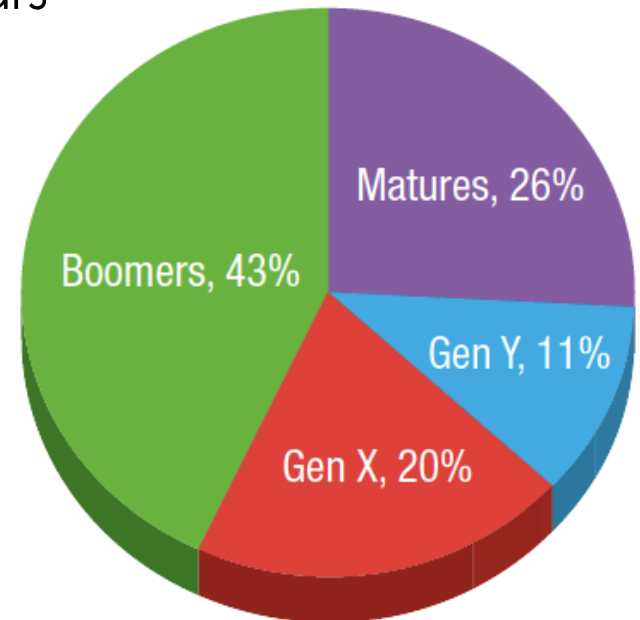


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U.S. Charitable Habits by Generation

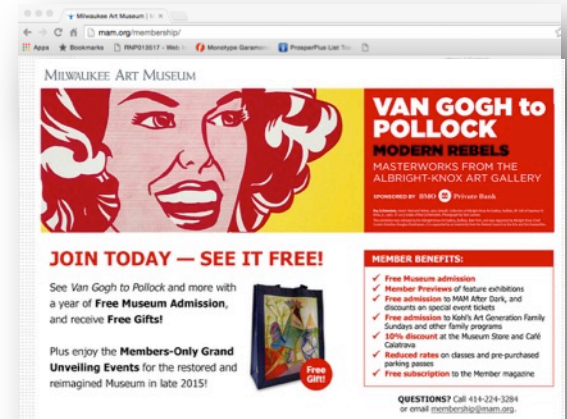
U.S. Charitable Habits by Generation

- Matures and Boomers give 69% of dollars raised
- Gen X and Y give 31% of dollars
- Sustainer giving liked best by Boomers (convenience cited)
- Total annual charitable contributions grow with age—with number of charities
- What inspired their gift or “un-attributable donations” is an ongoing issue for non-profits to understand efficiency of campaigns



U.S. Charitable Habits by Generation

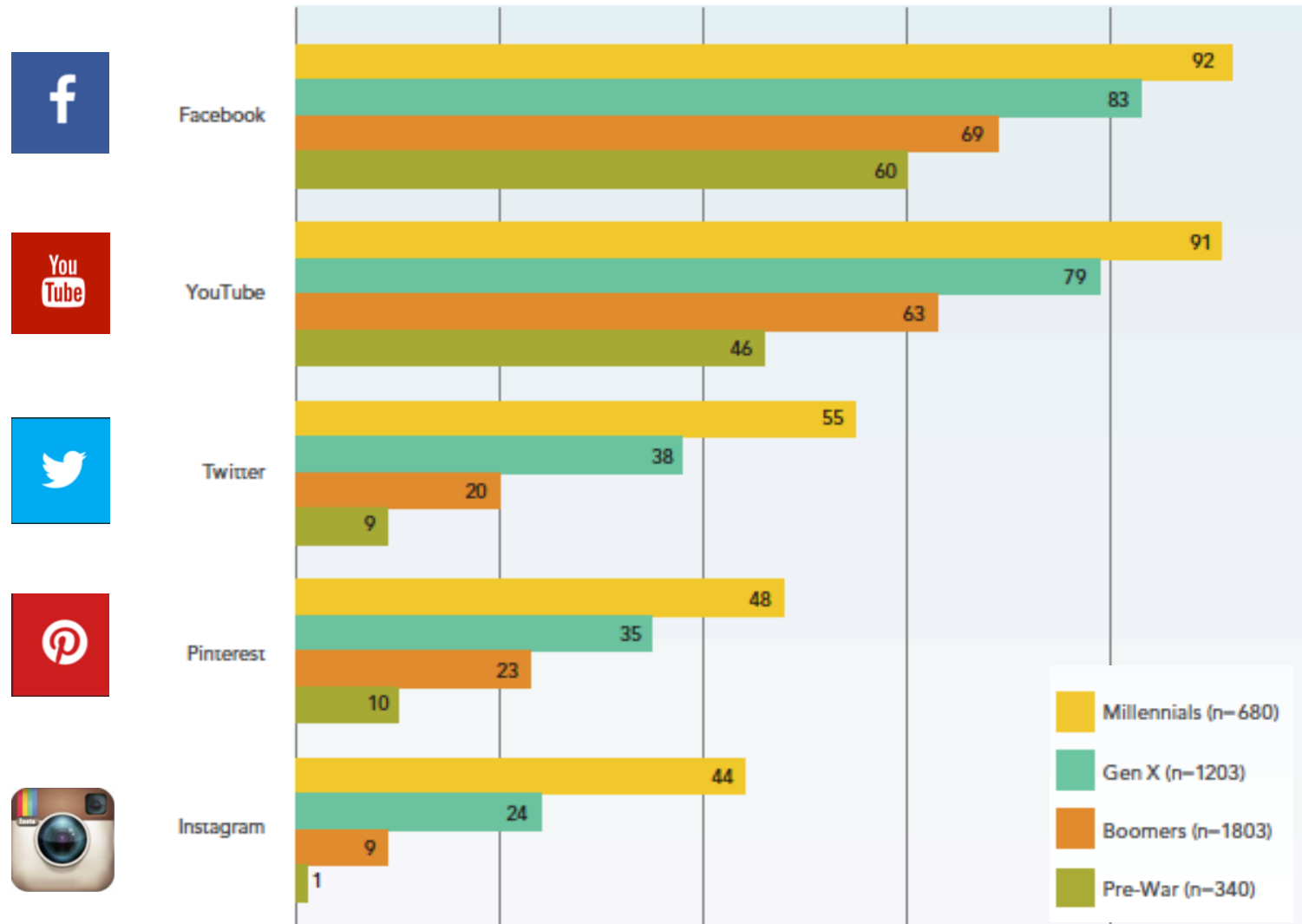
- Channels donors give through*
 - More Gen X and Y give online than through mail
 - Baby Boomers now give equally online and by mail
- Optimizing and customizing your **online join/renew process** matters!
 - Org X used an **un-optimized, generic** membership transaction process → **16%** of acquisition campaign \$ received online
 - Org X created a custom, optimized transaction page → **26%** of acquisition campaign \$ received online; achieved higher results



—Blackbaud, The Next Generation of American Giving, Aug 2013

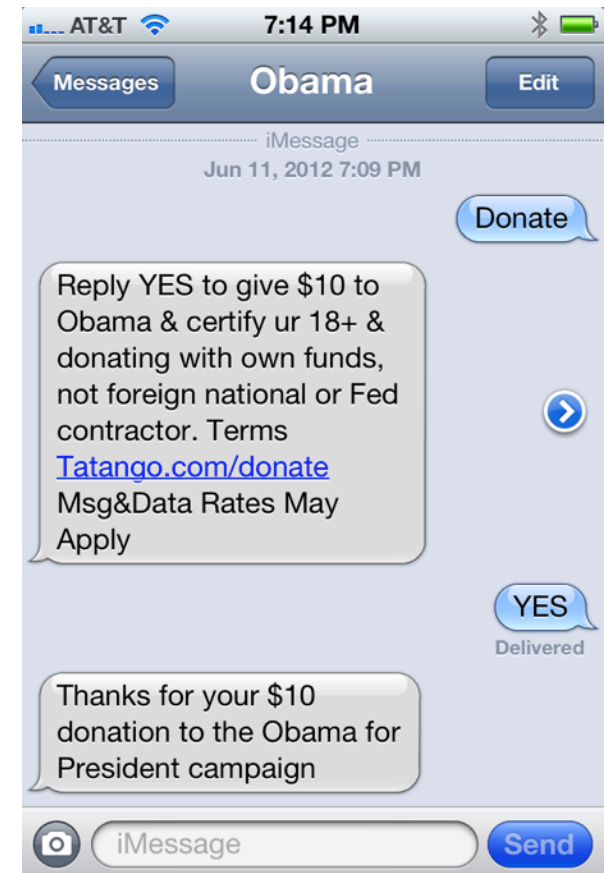
*other than giving at the grocery store checkout and cause-related products

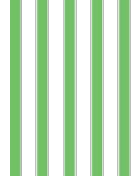
U.S. Social Media Use by Generation



U.S. Mobile Phone Use

- 12% of membership purchases on smartphone or tablet
 - 17% if site is mobile responsive
- 49% of fundraising emails are read on mobile
- 79% of social media traffic is on mobile
- 70% of donors report that texts are a good way for nonprofits to get their attention





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Hot Topics

Hot Topic: Video Everything

- **Facts:**

- YouTube, Facebook, and Snapchat EACH have 4B+ videos views per day
- YouTube viewers grew 40% YOY in March 2015
- Facebook grew 4X YOY in June 2015
- More than half of views come from mobile
- Video can increase landing page conversions by 80%



- **Potential Membership Uses:**

- Emails/webpages for renewal, upgrade, acquisition, annual fund
- Promote membership on homepage, general member page
- Member thank-you/cultivation emails
- Drive awareness, clicks on YouTube/social media

- **Challenges:**

- Budget, staff training, tracking ROI

Hot Topic: Video Everything



The Fashion World of Jean Paul Gaultier at the Brooklyn Museum (directed by Stéphane Sednaoui)



BrooklynMuseum

[Subscribe](#) 6,309

27,531

[+](#) Add to [Share](#) [...](#) More

[Like](#) 301 [Dislike](#) 7

Published on Oct 15, 2013

There is no better way to experience this exhibition than as a Brooklyn Museum Member. For exclusive access, free tickets and more: <http://www.brooklynmuseum.org/support...>

SHOW MORE

Membership plug

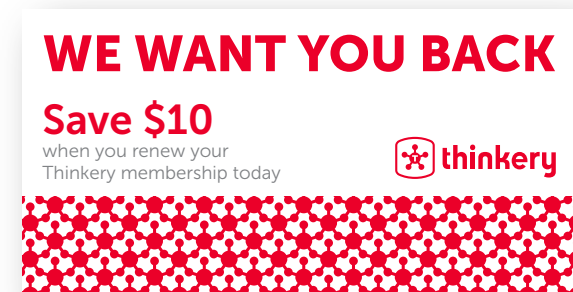
<https://www.youtube.com/watch?v=ZCgbBFibAVQ>



Hot Topic: Big Data

Example: You want to predict likelihood to renew, using a predictive analytics study

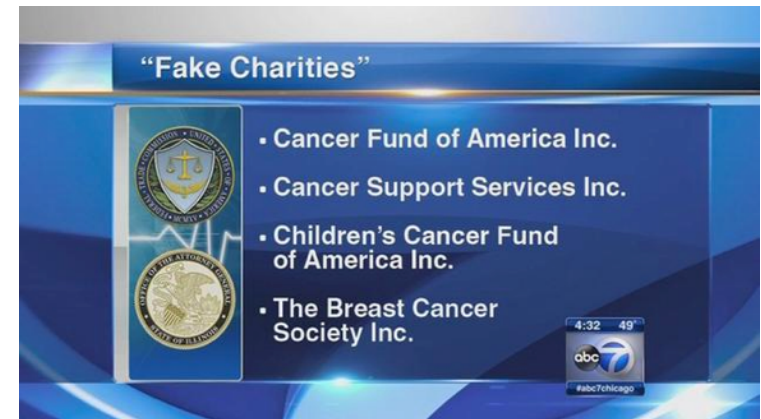
1. With vendor, **determine potential factors** correlated with renewals
 - Ex. longevity, join channel, join offer, # of visits, member level, etc.
2. **Vendor develops model** based on historical data, determines which factors actually correlated with renewals in the past
 - Ex. Members who joined with 10% off offer = 20% less likely to renew
3. Vendor then uses model to **calculate likelihood to renew** in the coming year for all current members (yielding score or segments)
4. You decide **how to use this information...**
 - Ex. No special offer to most likely to renew, 10% off to least likely to renew



Hot Topic: Ethics & Regulation

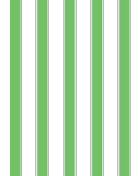
- **U.S.**

- 33% have “not too much” or “no confidence” in non-profits (June 2015 Gallup Poll)
- March 2016: Four “sham” cancer charities run by single family exposed for misusing \$75 million in donations for personal use, closed by FTC



- **California**

- Recently defeated an effort to require disclosure of fundraising counsel cost on all fundraising efforts
- Proposing non-profits disclose list of top donors to state



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What does our new world
mean for membership in 2016?

What does our new world mean for membership in 2016?

- One size does not fit all in your program. Use multiple, integrated tactics and channels.



The Barnes Foundation

March 14 at 5:22pm · 🌐

Only a few hours left to receive a free copy of "Masterworks of the Barnes." Become a Barnes member at the Supporter level or above using the code JOINMAST by midnight to receive your free copy.

THE BARNES FOUNDATION

PICASSO

The Great War,
Experimentation and Change

Last chance for free tickets!

JOIN NOW! >

Pablo Picasso (Spanish, 1881-1973). Harlequin Musician, 1904. Oil on canvas, 51 3/16 x 38 1/4 in. (130 x 97.2 cm). Given in loving memory of her husband, Tull Schreiber, by Rita Schreiber, 1989. D.C. National Gallery of Art, Washington, D.C. © 2008 Estate of Pablo Picasso/Artists Rights Society (ARS), New York

THE BARNES FOUNDATION
2025 BENJAMIN FRANKLIN PARKWAY PHILADELPHIA, PA 19130

Join us for the most extraordinary exhibition of Picasso paintings, only in Philadelphia.

Sample A. Sample
Address
Address
Address
City, State Zip

Details inside about a private preview, free tickets, special discounts, and more!

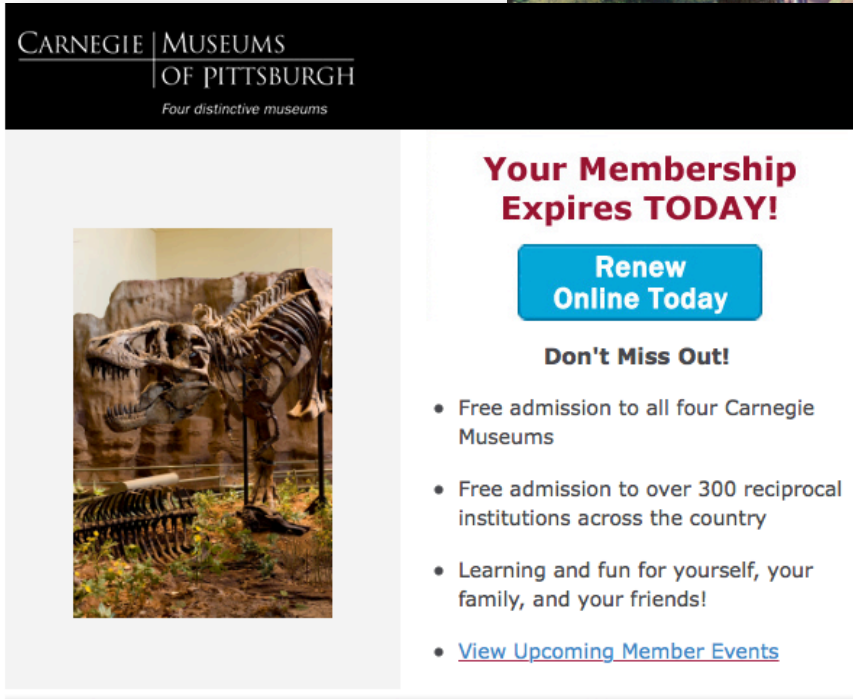

What does our new world mean for membership in 2016?

- Members expect more current, customized solicitation, and communication.



What does our new world mean for membership in 2016?

- **Membership relationship** remains paramount. Use predictive analytics thoughtfully, understand your members' connection to your organization, and what they need from a membership program.




CARNEGIE | MUSEUMS
OF PITTSBURGH
Four distinctive museums

Your Membership Expires TODAY!

Renew Online Today

Don't Miss Out!

- Free admission to all four Carnegie Museums
- Free admission to over 300 reciprocal institutions across the country
- Learning and fun for yourself, your family, and your friends!
- [View Upcoming Member Events](#)



What does our new world mean for membership in 2016?

- Boomers will still be your key fundraising audience for many years. Along with the mythbuster alert!

Baby Boomers

Who are they?
People born between **1946-1964**


80+ million baby boomers exist today
THAT'S NEARLY 2X MORE THAN GEN X

10,000 baby boomers retire everyday
➔ **that will continue for the next 15-20 years**

Boomers earn **47%** of all income in the US

Average boomer household income: **\$53,000**

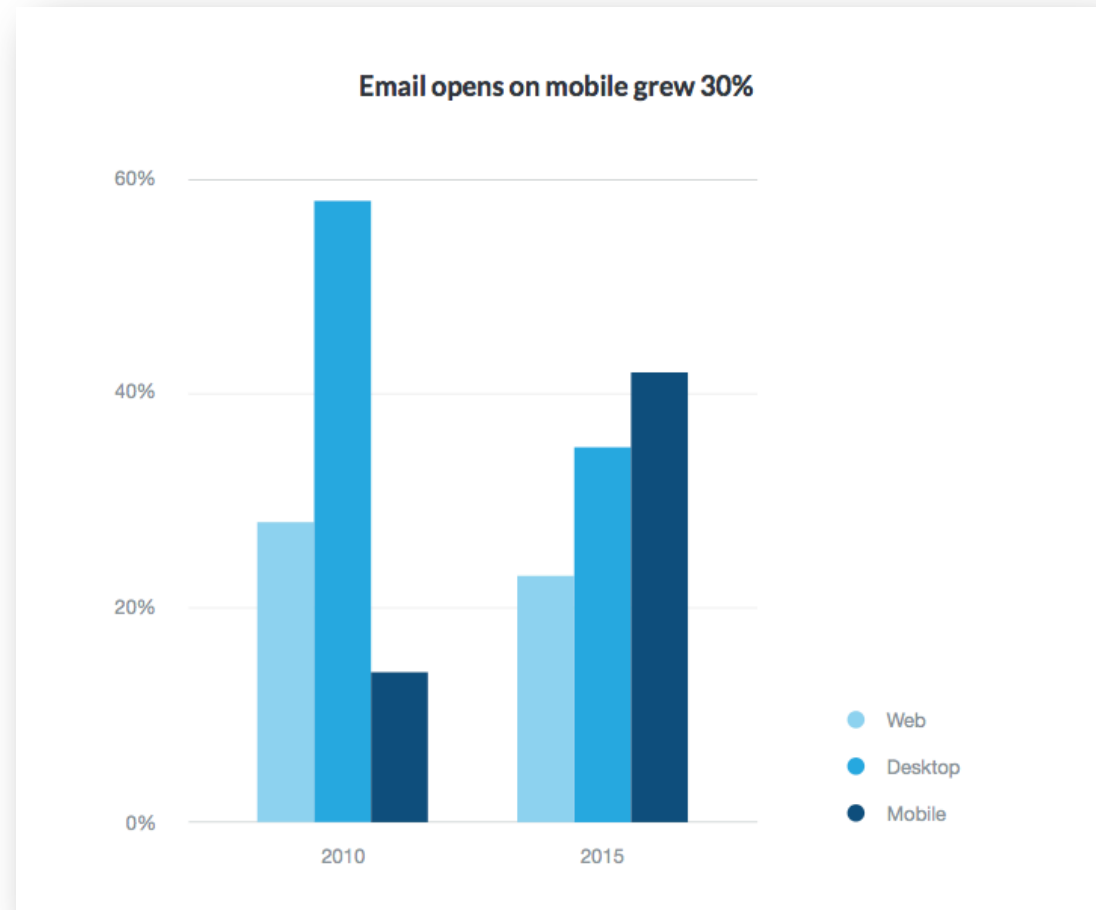
Boomers represent **40%** of consumer demand

Brought to you by  qSample
Online sample made easy



What does our new world mean for membership in 2016?

- Mobile viewing and mobile giving are the new normal.



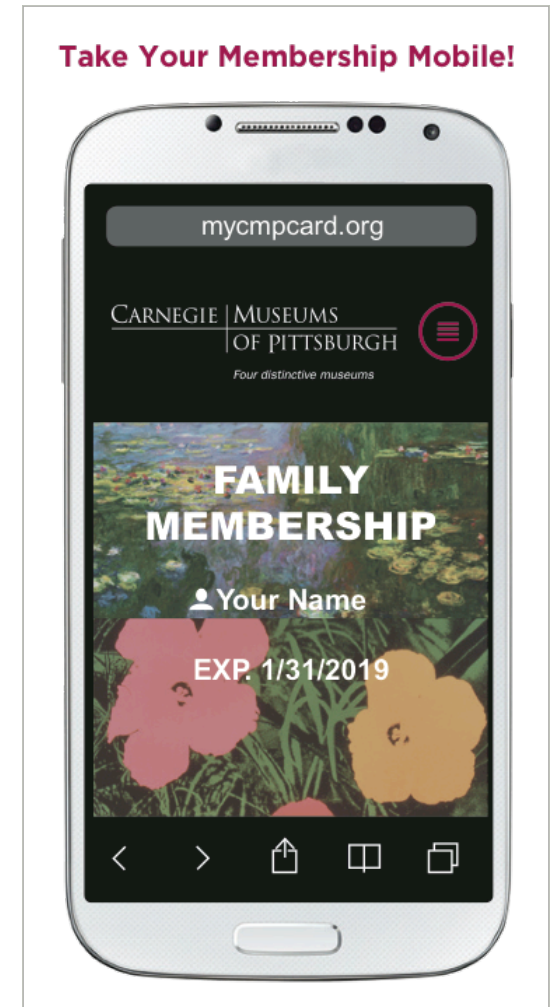
What does our new world mean for membership in 2016?

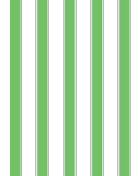
- Mail + email + user-friendly landing page for transacting are the new basics.



What does our new world mean for membership in 2016?

- Be strategic and open to putting together your mix of old and new technologies in this age of information overload.
- Keep best practices even as you add the new – you need to ensure ongoing income!
- According to Albert Einstein:
“The measure of intelligence is the ability to change.”



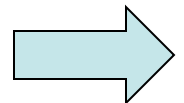


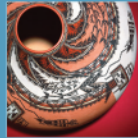
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Thank you!

Mae Daniller
President
mdaniller@daniller.com

AMMC 2016
April 11, 2016 | Chicago





Innovations in Membership

Ashley L. Alexander
Director of Membership

American Museum
Membership Conference
Chicago, IL April 2016



What we're doing...

1. Thinking about Big Data and Post-Demographic Consumerism
2. Marketing multi-channel
3. Giving Members the ability to manage their benefits

What we're doing...

- 1. Thinking about Big Data and Post-Demographic Consumerism**
2. Marketing multi-channel
3. Giving Members the ability to manage their benefits

*“The important thing in science is not so much to obtain new facts as to **discover new ways** of thinking about them.”*

- Sir William Bragg
1915 Nobel Prize winner in Physics
Physicist, chemist and mathematician

What is 'Big Data'?

“...data of a **very large size**, typically to the extent that its **manipulation and management** present significant **logistical challenges...**”

SOURCE: Oxford English Dictionary

For us that looks like...



The logo for UMBEL, featuring a stylized 'u' icon with three dots above it, followed by the word 'UMBEL' in a bold, sans-serif font.The logo for emma, featuring a circular icon of a woman's face with glasses, followed by the word 'emma' in a lowercase, serif font.The logo for Recurly, featuring the word 'Recurly' in a white, serif font on a purple rectangular background.The logo for RE, featuring the letters 'RE' in a white, sans-serif font on an orange square background with a grid pattern.The logo for DATA WAREHOUSE, featuring a blue background with a grid of binary code and two overlapping circular elements, with the words 'DATA WAREHOUSE' in white, sans-serif font at the bottom.The logo for Jca, featuring the letters 'Jca' in a white, sans-serif font on a blue square background.The logo for Telerik, featuring a green icon of a diamond shape with four smaller diamonds inside, followed by the word 'Telerik' in a bold, sans-serif font with a trademark symbol.The logo for Gateway TICKETING SYSTEMS, featuring a large blue 'G' followed by the word 'Gateway' in a blue, serif font, and 'TICKETING SYSTEMS' in a smaller, blue, sans-serif font below it.

Google Analytics Solutions

D E N V E R M U S E U M O F N A T U R E & S C I E N C E

THIS IS YOUR

Search SORT: AUDIENCE %

-  Denver Museum of Natur... 28%
-  Denver Zoo 25%

ect



Event: Member Only After Hours:
Date/Time: Wednesday, April 20, 2016
Item: MEMB EVENT TEMP EXH
 FOOD
Order ID: 234010

Museum Shop Purchases

Date	PLU	Description	Discount	Discount Type	Paid
Mar 21, 2016	162207	THINKING PUTTY SM	\$0.40	Membership Discount	\$3.59
	00908153	ROAR-A-SAURUS #3342	\$1.20	Membership Discount	\$10.79
	01303650	AGATE SLICE SMALL R313A	\$0.30	Membership Discount	\$2.69
	165241	ER UPCYCLED RED&GOLD	\$11.24		\$3.75
	9781632204394	ROBOTS (FACT ATLAS)	\$1.50	Membership Discount	\$13.49
	01300956	AMETHYST CLUSTER AMYCL/1	\$0.40	Membership Discount	\$3.60
	01303872	*CRACK-OPEN GEODE SM R355A	\$0.14	Membership Discount	\$1.25
	166885	RAINBOW GEODE	\$0.40	Membership Discount	\$3.59
					\$42.75
Feb 12, 2016	9780395906644	1ST GDE INSECTS (PB)	\$0.69	Membership Discount	\$6.26
	164358	PUTTY ARCTIC FLARE	\$3.00	Membership Discount	\$26.98
	9781492609650	LINCOLN'S GIFT	\$1.50	Membership Discount	\$13.49
	162290	MAGNET REPLICA FOSSIL	\$0.30	Membership Discount	\$2.69
	00902694	SPACE SHUTTLE PULL BACK	\$1.20	Membership Discount	\$10.79
					\$60.21

HOME PHONE






WORK PHONE


E-MAIL (Watch for our monthly eNews for special offers and updates. We w

FAMILY/FAMILY PLUS MEMBERSHIPS List your own children, same h
GRANDPARENT MEMBERSHIPS List your own grandchildren, ages 3-18
 the household, please list on a separate page.

FIRST LAST BIRTH DATE

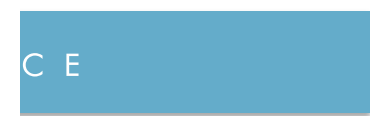
FIRST LAST BIRTH DATE

	12/23/2014	Cash	Zoology - Individual	Giving history	\$5,000.00
	12/23/2014	Cash	Space Science - Individual		\$5,000.00
	12/23/2014	Cash	Health Science General - Individual		\$5,000.00
	12/1/2014	Cash	Museum After Dark 2014 - Individual		\$600.00
	12/24/2013	Cash	Health Science General - Individual		\$5,000.00

 Colorado Rockies 17%

me (please print)

e (MM/YY) CVV



What for?

- Understand member behavior
- Make informed decisions
- Implement targeted marketing/strategic promotions
- Increase attendance and sales

A personalized, relevant and
engaging experience

Who else?

GUGGENHEIM



NORMAN ROCKWELL MUSEUM

...and others!

SOURCE: The Wall Street Journal – December 2014

DENVER MUSEUM OF NATURE & SCIENCE

So what is Post-Demographic Consumerism?








People – of all ages and in all markets – are constructing their own identities more freely than ever. As a result, consumption patterns are no longer defined by ‘traditional’ demographic segments such as age, gender, location, income, family status and more.



SOURCE: Trendwatching

Traditional Segmentation

Search		↓ SORT: AUDIENCE %
 OWNS HOME	Owens Home	88%
	White/Other	87%
 MARRIED	Marrted	68%
 WOMEN	Female	62%
	No Children	51%
 HAS CHILDREN	Has Children	49%
 GRADUATED COLLEGE	Graduated College	41%

SOURCE: Umbel

Segmentation evolution



SOURCE: Umbel

D E N V E R M U S E U M O F N A T U R E & S C I E N C E



Buy A Membership

By supporting our nonprofit mission with your membership purchase, we thank you by welcoming you into our membership family and offering you exclusive privileges for members only.

Membership pays for itself in just 2 visits! Join today for great benefits:

- FREE Museum admission for 12 months
- Deep discounts on special ticketed exhibitions
- 25% off IMAX 3D tickets
- 10% off at the Shop & Cafe
- And you'll be the FIRST to see new exhibitions & shows at members-only premieres!

If you wish to purchase a membership as a [Gift Membership](#), please [click here](#).

[Click to view full member privileges](#)

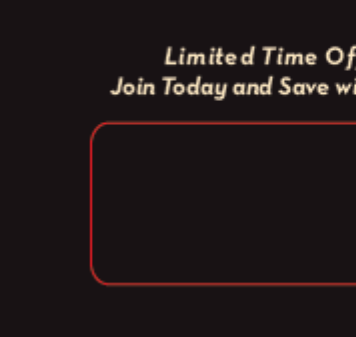
Dear Ms. Ashley L. Alexander and Mr. ...
As a member, you help sustain the I...
research and collections, and world...
deepen your relationship with the M...
the Giving Club, just in time to exp...





Become a Giving Club member and

- FREE anytime tickets to s...
anytime tickets to [Robot Re...](#)
from Boeing Company). [Any](#)
[surcharged exhibition and n...](#)
- FREE IMAX and Planetariu...
to see the latest shows thro...
18.
- Exclusive invitations to G...
Behind-the-Scenes Night in...
throughout the year.

[Click here to become a Curator member](#)
number 389504, and pass...
additional benefits right away!

Don't have a webstore account? [Cr...](#)
name. Once your account is creat...
the categories on the left side of yo...
select the Curator level and enter p...



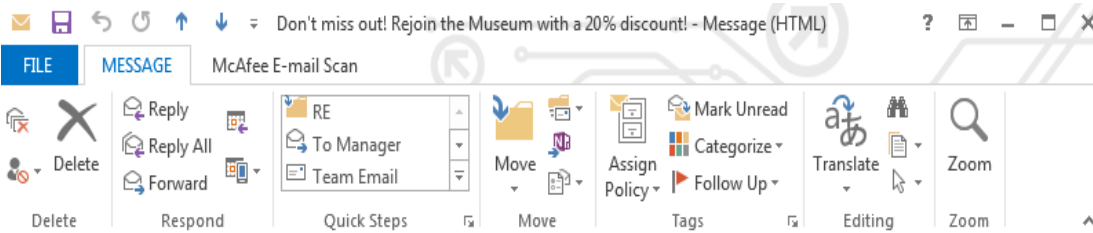
	<p>Family Plus Membership - \$135 (Best Value!)</p> <p>Benefits for 1 or 2 named adults (living in the same household) PLUS their guests; up to 7 in total party.</p>
	<p>Family Membership - \$90</p> <p>Benefits for 1 or 2 named adults living in the same household, PLUS their own children (ages 3-18, immediate family).</p>
	<p>Grandparent Membership - \$90</p> <p>Benefits for 1 or 2 named adults living in the same household, PLUS 4 of their own grandchildren (ages 3-18).</p>
	<p>Dual Membership - \$70</p> <p>Benefits for 2 named individuals (living in the same household) or 1 individual plus one guest.</p>



What we're doing...

1. Thinking about Big Data and Post-Demographic Consumerism
- 2. Marketing multi-channel**
3. Giving Members the ability to manage their benefits

Marketing



Wed 3/30/2016 1:12 PM
Denver Museum of Nature & Science <members@dmn...>
Don't miss out! Rejoin the Museum with a 20% discount!

To Ashley Alexander

i You forwarded this message on 3/30/2016 1:12 PM.
If there are problems with how this message is displayed, click here to view it in a web browser.

Suggested Meetings




Dear Ms. Ashley L Alexander and Mr. Justin Sturdevant,

You are invited to [rejoin](#) the Museum and receive a special 20% discount! For example, **a Family membership is just \$72!** Rejoin now and enjoy access to exclusive members events and **deep discounts on tickets to [Robot Revolution](#)** (supported by Google, additional major support from The Boeing Company), open through August 7.

To receive your 20% discount and exclusive invitations to members-only evening events **online today** with your member number **389504**, and promo code: **AS16-ROBOLFE**. Because **this special offer is available only until March 31!**

Explore and interact with a cutting-edge collection of robots from around the world in the new exhibition [Robot Revolution](#). Robots that have rarely been shown to the public demonstrate how these amazing machines can change how we live, work, and play for the better.

 **Denver Museum of Nature & Science** ✓
March 10 at 10:11am · 🌐

Join today with 20% off and see Robot Revolution! Promo code: AS16-FBROBO



Join the Museum with a 20% discount!

Members enjoy free admission for an entire year, plus discounts and invitations to members-only events. Support your Museum today!

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346 Likes 17 Comments 68 Shares

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Facebook Targeting

Run Look-a-like Campaigns Built Around Personas

BUILD IDEAL SEGMENT

Active Museum Members

FIND UNIQUE AFFINITIES

	I love science	16%
	Denver Art Museum	10%
	Bill Nye The Science Guy	8%
	Cheyenne Mountain Zoo	5%
	Member_Status > Lapsed	<1%

TARGET LOW-COST AFFINITIES

Denver Museum of Nature & Science

March 10 at 10:11am · 4p

Join today with 20% off and see Robot Revolution! Promo code: AS15-FBROBO

ROBOT REVOLUTION
Experience Everything

Join the Museum with a 20% discount!
Members enjoy free admission for an entire year, plus discounts and invitations to members-only events. Support your Museum today!

Learn More

245 Likes · 17 Comments · 60 Shares

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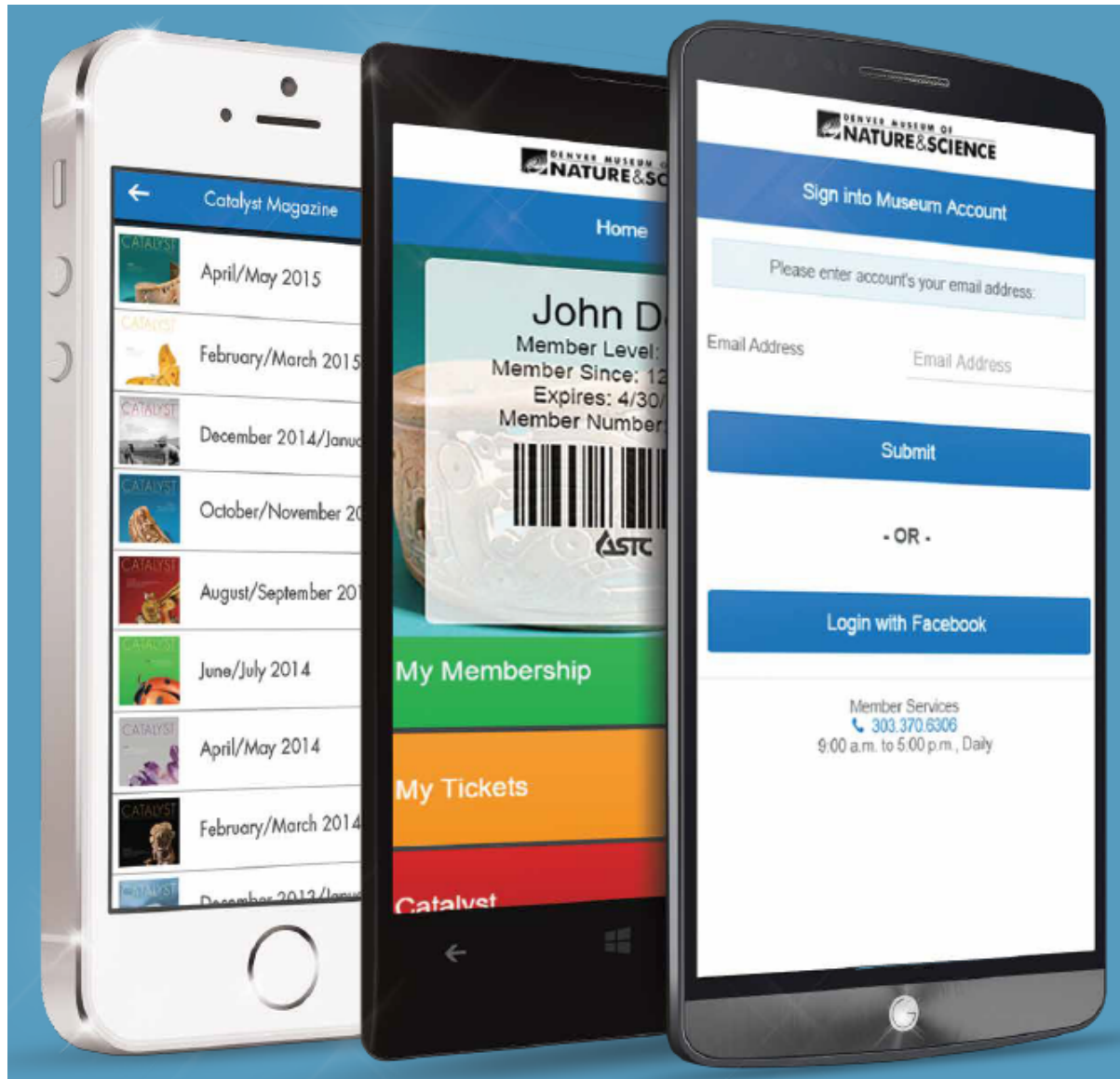
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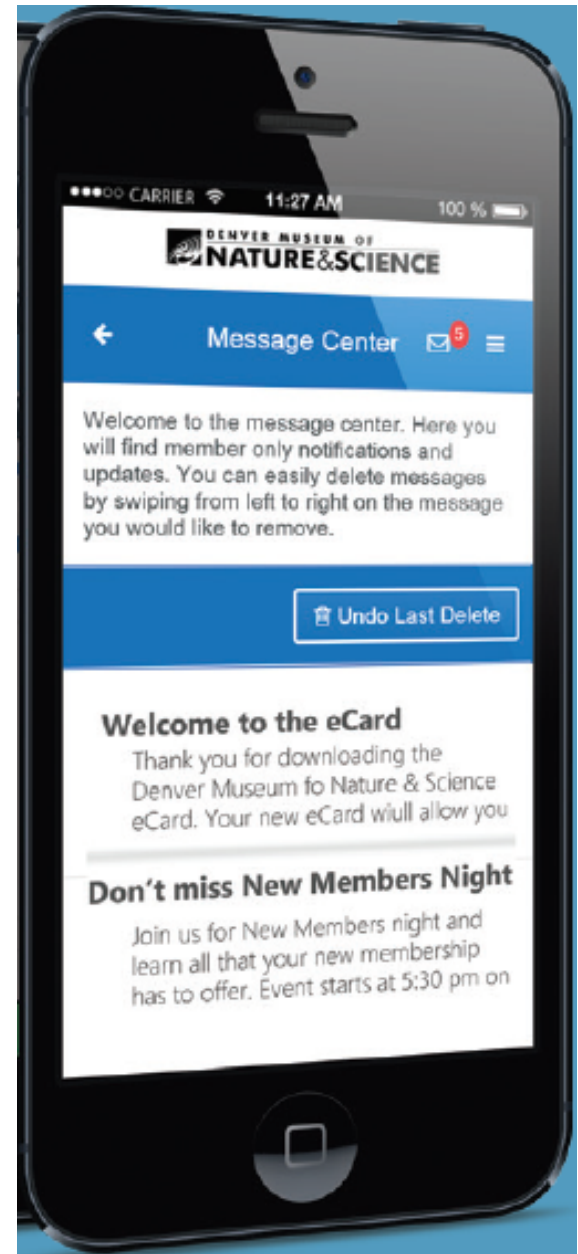
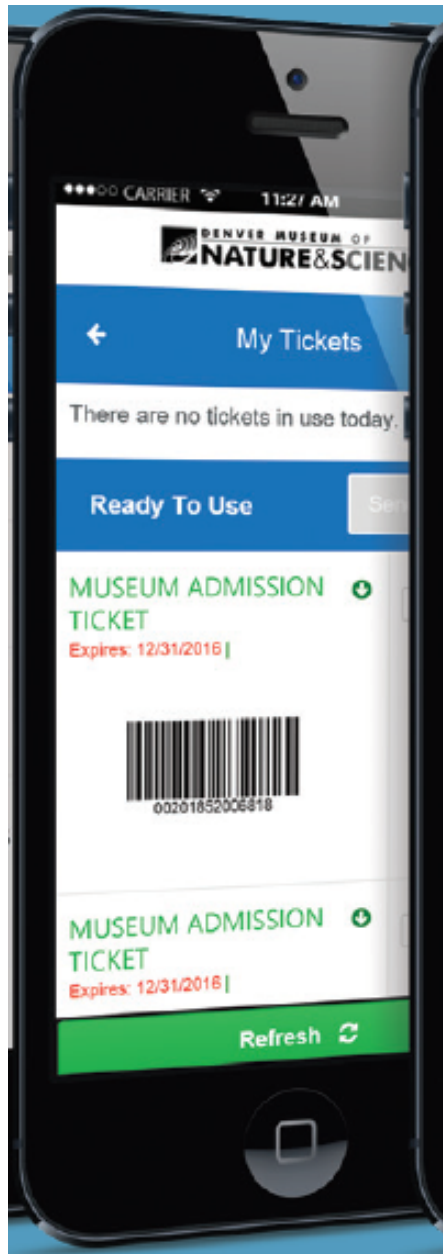
D E N V E R M U S E U M O F N A T U R E & S C I E N C E

What we're doing...

1. Thinking about Big Data and Post-Demographic Consumerism
2. Marketing multi-channel
3. **Giving Members the ability to manage their benefits**

Benefit Management





CATALYST

DENVER MUSEUM OF NATURE & SCIENCE MAGAZINE
SPRING 2016



INSIDE ///
CHOCOLATE: THE EXHIBITION
ROBOT REVOLUTION
GIRLS AND SCIENCE

My account

Membership Info

Billing Addresses

Order History

Gift Memberships

Change Password

Membership Cards

Member Benefits

These are your Member Benefits. In this area you can redeem or issue you guest tickets and share them with others.

AVAILABLE

USED

These are your issued tickets

Ready To Use

Send selected

Science Lounge Ticket
Expires: 06/30/2016

Send to
a Friend

Upcoming

There are no tickets planned for upcoming use.

Ticket Balance

Science Lounge Ticket
Expires: 06/30/2016

Get Ticket

Membership team

Director of Membership



Ashley Alexander

Onsite
Sales
Associate



*Shara
Knight*

Program
Manager,
General
Membership



Jennifer Stone

Program
Manager, Giving
Club
& YP Membership



Denae Duesler

Events
Logistics
Manager



Greg Lovell

Membership
Business
Analyst

*Molly
Engleking*

Database
Administrator



*Aubrey
Ryan*

Thank You!



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D E N V E R M U S E U M O F N A T U R E & S C I E N C E