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For all inquiries, please contact Michelle Sills at msills@impacts-experience.com.



It's Cool to Be Kind

What Members Value & What This Means for the Future

Leadership Forum

American Museum Membership Conference | 19 May 2025



A black and white portrait of Colleen Dilenschneider, a woman with long, wavy hair, smiling. She is wearing a dark, short-sleeved dress. The portrait is set against a large, solid orange circular background.

Colleen Dilenschneider

Co-Founder, IMPACTS Experience

“Do what you love. **Know your own bone;** gnaw at it, bury it, unearth it, and gnaw at it still.”

- *Henry David Thoreau*



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Bethany Gotschall, Content Strategist for IMPACTS Experience, is also here to help facilitate and answer questions.



@impacts-experience
@colleendilen



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Caltech

the David &
Lucile **Packard**
FOUNDATION

IAS | INSTITUTE FOR
ADVANCED STUDY

n=296,223

US composite

n=55,767

Self-identified current and recent members
(within the past two years)

The first quarter of 2025 was **eventful**.

As Foreign Tourists Stay Away, U.S. Could Lose \$12.5 Billion This Year, Tourism Group Says

Why Are Countries Issuing Travel Advisories for the United States?

In the U.S., a Summer Travel Slump Looms

Consumer Sentiment Darkens Further, Inflation Concerns Worsen

Americans' optimism about the economy is at a near-record low

International travel is declining, and it's costing the US: "It's shaking everything up"

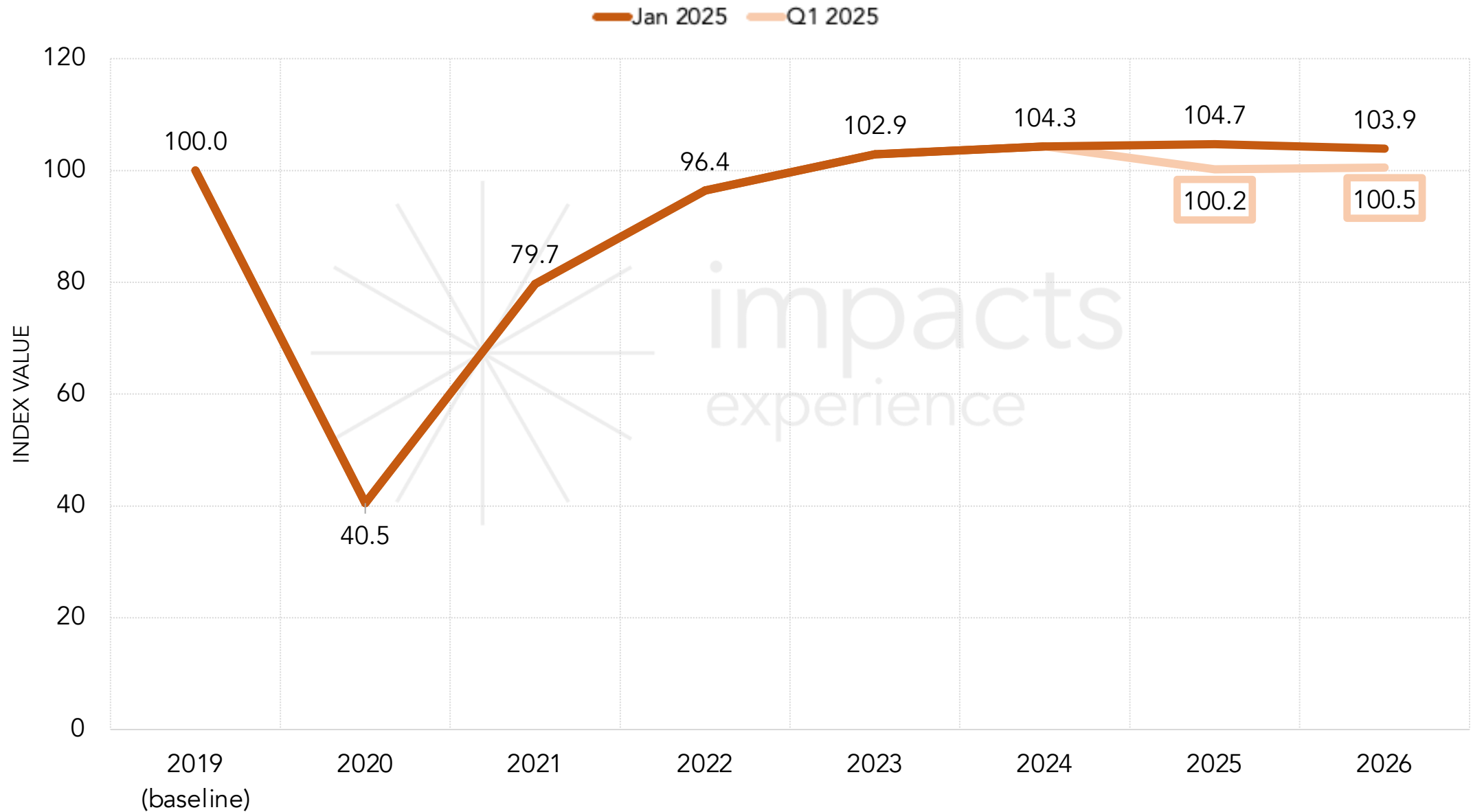
Entire staff at federal agency that funds libraries and museums put on leave

Consumers Prop Up the Economy. They're Showing Signs of Strain.

Let's start with the **bad news.**

Market potential analysis: January 2025 vs. April 2025

Exhibit-based organizations, eight-year market potential observation and expectation (2019-2026)



A person is lying on a light-colored couch, reading an open book. They are holding a white mug with both hands. The scene is brightly lit, suggesting a relaxed indoor environment.

Intentions to visit museums are down due to several factors, but predominately:

- Decrease in international travel
- Domestic travel trends favoring some destinations over others (and staying home)
- Lower US consumer confidence and implications

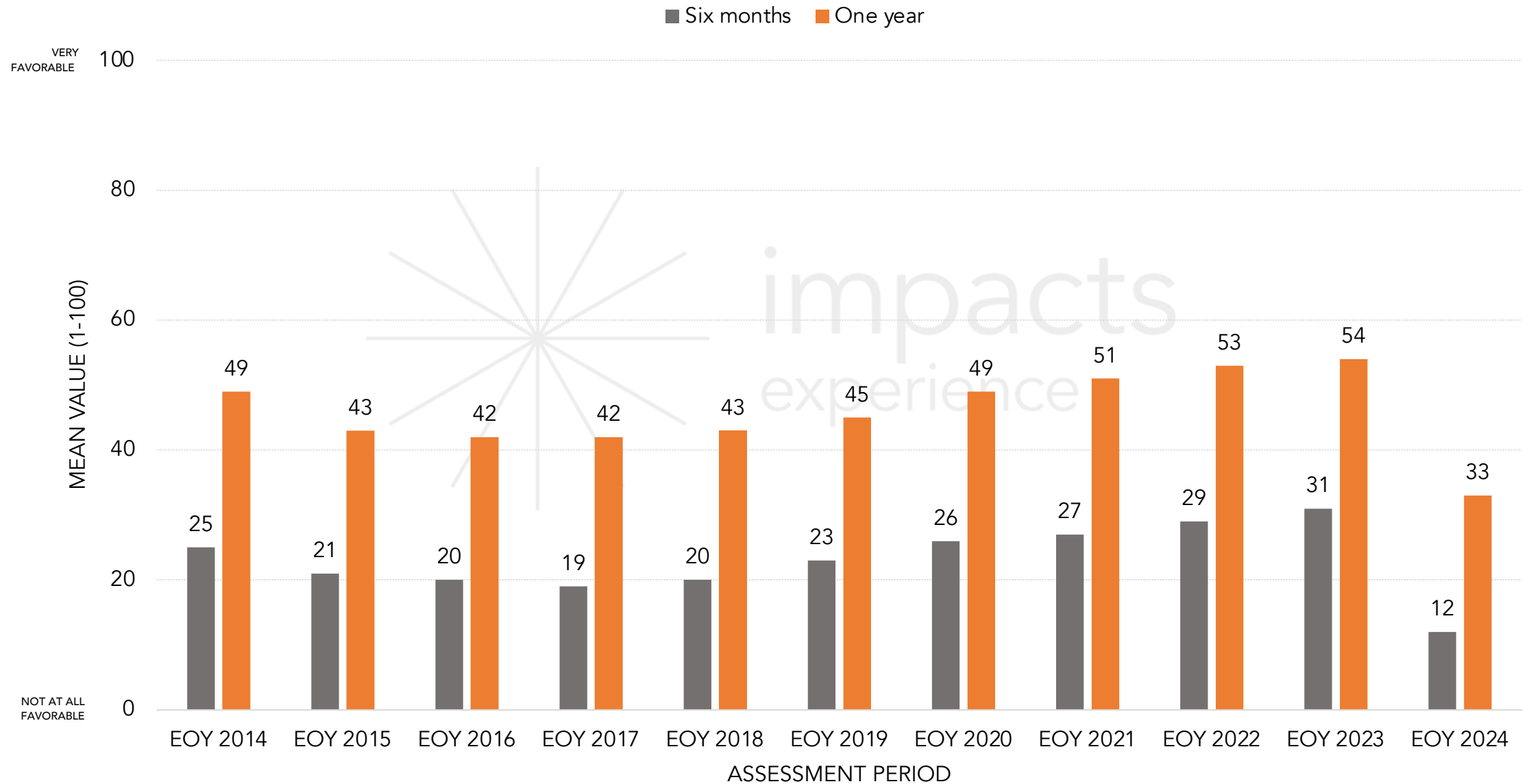
And **intentions to renew and acquire memberships** are down on the whole, too.



Decrease in international travel

Intent to visit the United States

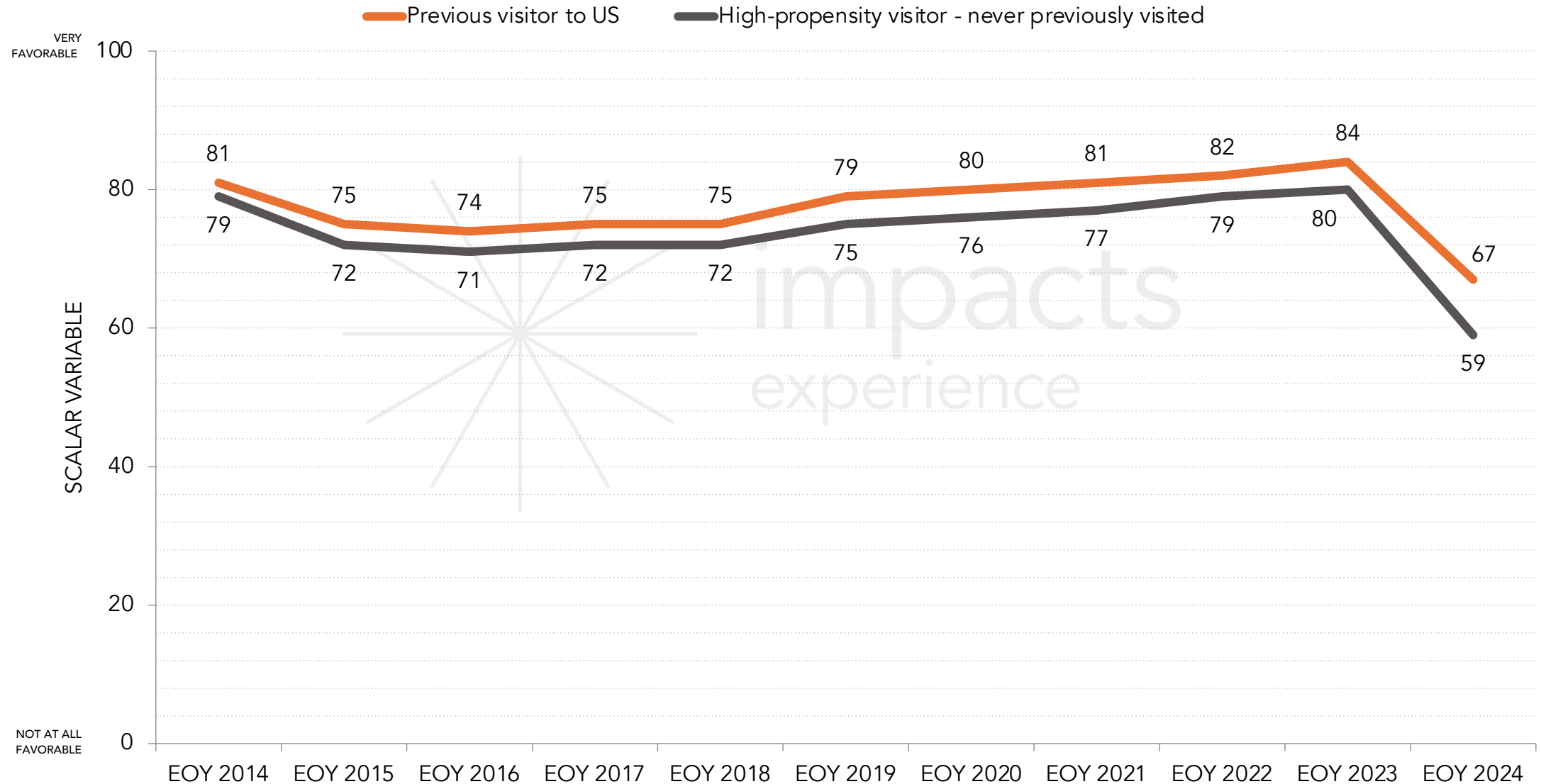
Intent to visit the Continental US within six months and one year
Temporal analysis of European + UK adult high-propensity visitors to the US for leisure purposes



Overall impression of the United States as a leisure destination

Favorability perception of the Continental US

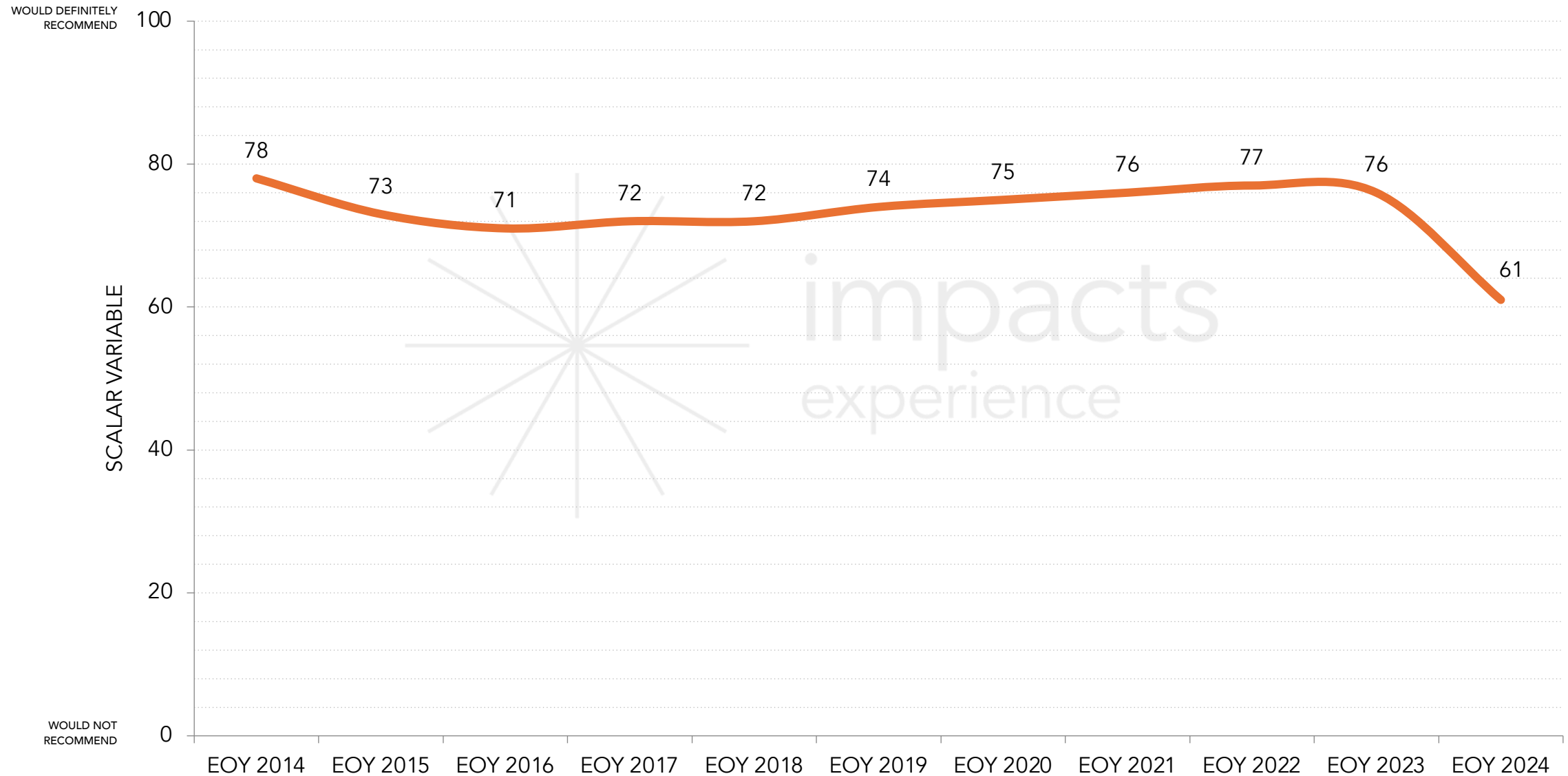
Temporal analysis of European + UK adult previous and high-propensity visitors to the US for leisure purposes



impacts
experience

Endorser/referral value of the United States as a leisure destination

Likelihood to recommend the Continental US as a leisure destination to a friend or family member
Temporal analysis of European + UK adult previous visitors to the US for leisure purposes



Leisure destination preference rank

Rank among high-propensity international visitors earning US\$300,000 / €275,000 / £240,000 annual household income

| Destination | 2014 Rank |
|----------------------|-----------|
| France | 1 |
| Spain | 2 |
| United States | 3 |
| Italy | 4 |
| United Kingdom | 5 |
| Greece | 6 |
| Mexico | 7 |
| Turkey | 8 |
| Austria | 9 |
| Germany | 10 |

| Destination | 2024 Rank |
|----------------------|-----------|
| France | 1 |
| Spain | 2 |
| Italy | 3 |
| United Kingdom | 4 |
| Mexico | 5 |
| Turkey | 6 |
| Germany | 7 |
| Greece | 8 |
| United States | 9 |
| Austria | 10 |



Domestic travel trends **favoring
some destinations** over others

Domestic leisure destination preference rank by state

Rank among US high-propensity leisure visitors, top ten

| RANK | US STATE/DISTRICT | EOY 2019 (baseline) | Q1 2025 | TREND | % |
|------|-------------------|------------------------|---------|-------|-------|
| 1 | Hawaii | 79 | 82 | 3 | +3.8% |
| 2 | California | 77 | 79 | 2 | +2.6% |
| T3 | South Carolina | 74 | 74 | 0 | 0.0% |
| T3 | Colorado | 73 | 74 | 1 | +1.4% |
| 5 | Texas | 73 | 73 | 0 | 0.0% |
| T6 | New York | 76 | 72 | -4 | -5.3% |
| T6 | Arizona | 72 | 72 | 0 | 0.0% |
| T6 | Utah | 71 | 72 | 1 | +1.4% |
| T6 | North Carolina | 71 | 72 | 1 | +1.4% |
| T10 | Florida | 75 | 71 | -4 | -5.3% |
| T10 | Georgia | 71 | 71 | 0 | 0.0% |



Domestic leisure destination preference rank by state

Rank among US high-propensity leisure visitors, top 11-20

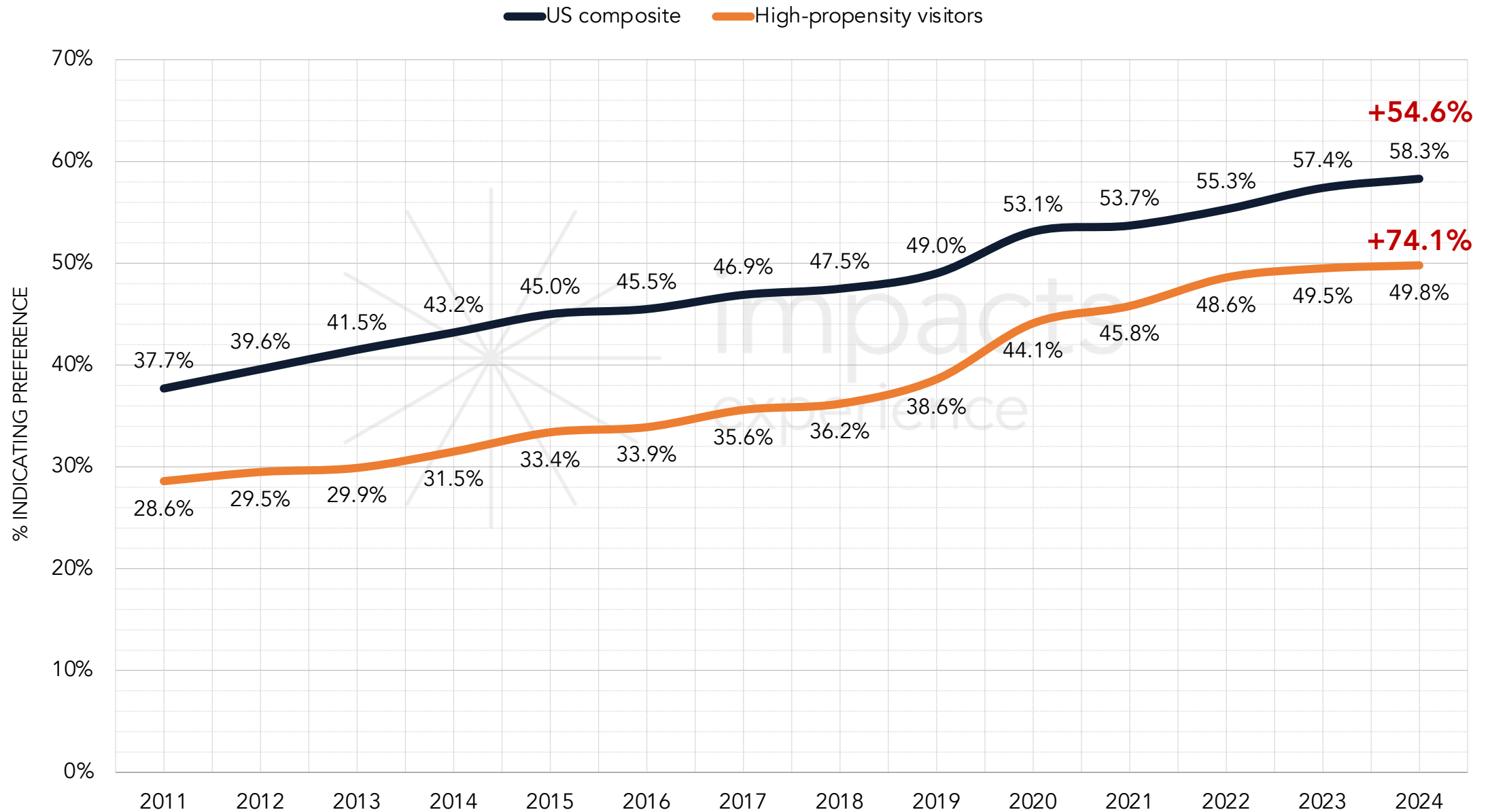
| RANK | US STATE/DISTRICT | EOY 2019 (baseline) | Q1 2025 | TREND | % |
|------|----------------------|------------------------|---------|-------|--------|
| T12 | Nevada | 70 | 70 | 0 | 0.0% |
| T12 | Tennessee | 69 | 70 | 1 | +1.4% |
| 14 | Illinois | 69 | 69 | 0 | 0.0% |
| T15 | Virginia | 71 | 68 | -3 | -4.2% |
| T15 | Massachusetts | 70 | 68 | -2 | -2.9% |
| T17 | District of Columbia | 75 | 66 | -9 | -12.0% |
| T17 | Maryland | 70 | 66 | -4 | -5.7% |
| 19 | New Jersey | 67 | 64 | -3 | -4.5% |
| 20 | Alabama | 60 | 60 | 0 | 0.0% |

A grayscale photograph of a person from behind, wearing large over-ear headphones. They are sitting in a living room with a sofa, coffee table, and framed pictures on the wall. The image is faded to serve as a background for the text.

Growing percentage of Americans **preferring to stay home**

"Stay home" during weekend preference

EOY 2011-2024

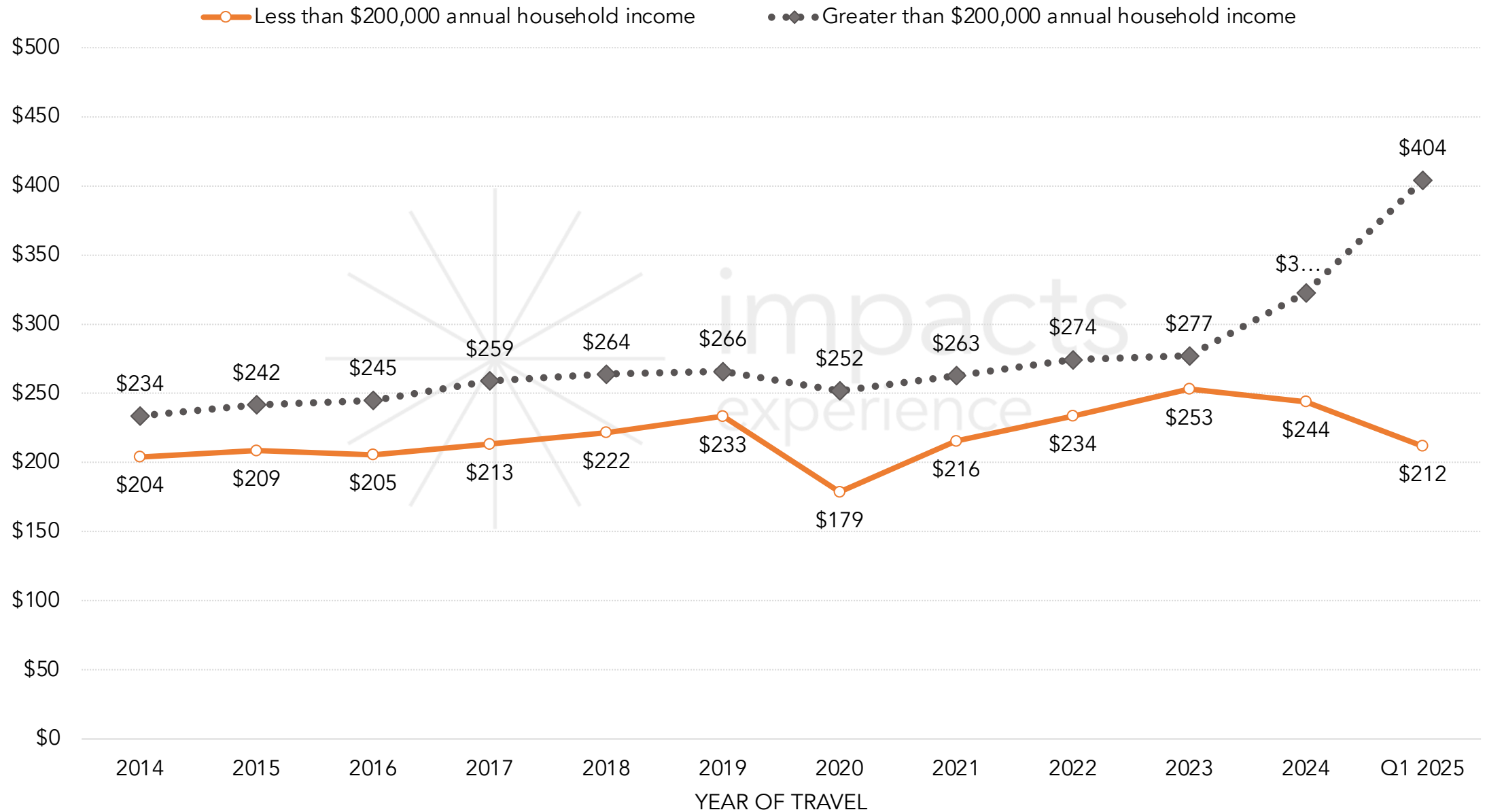




Lower consumer confidence within the United States

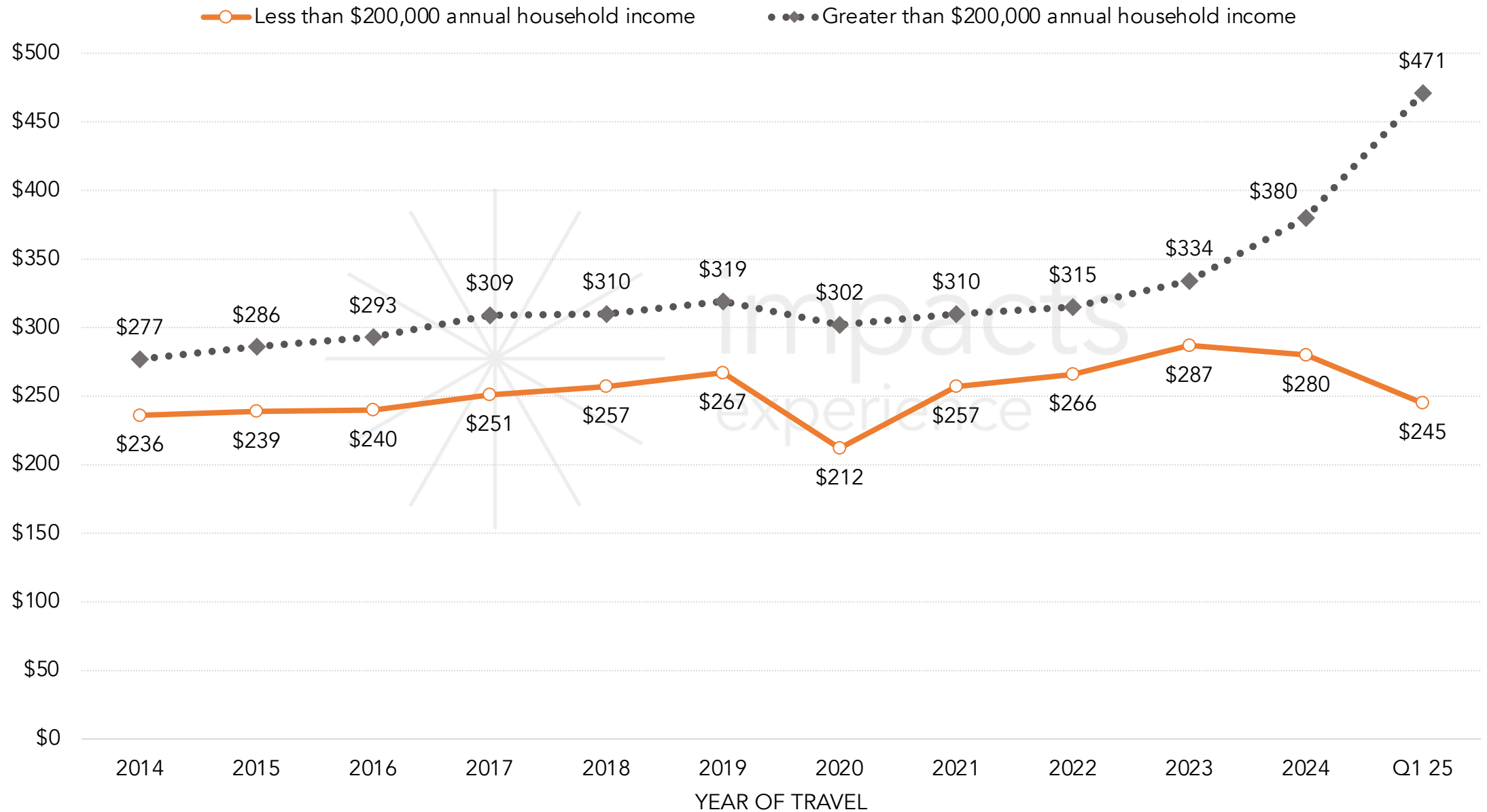
High-propensity visitor daily expected leisure spend

Daytrip leisure travel, Temporal comparison by indicated milestone chronology



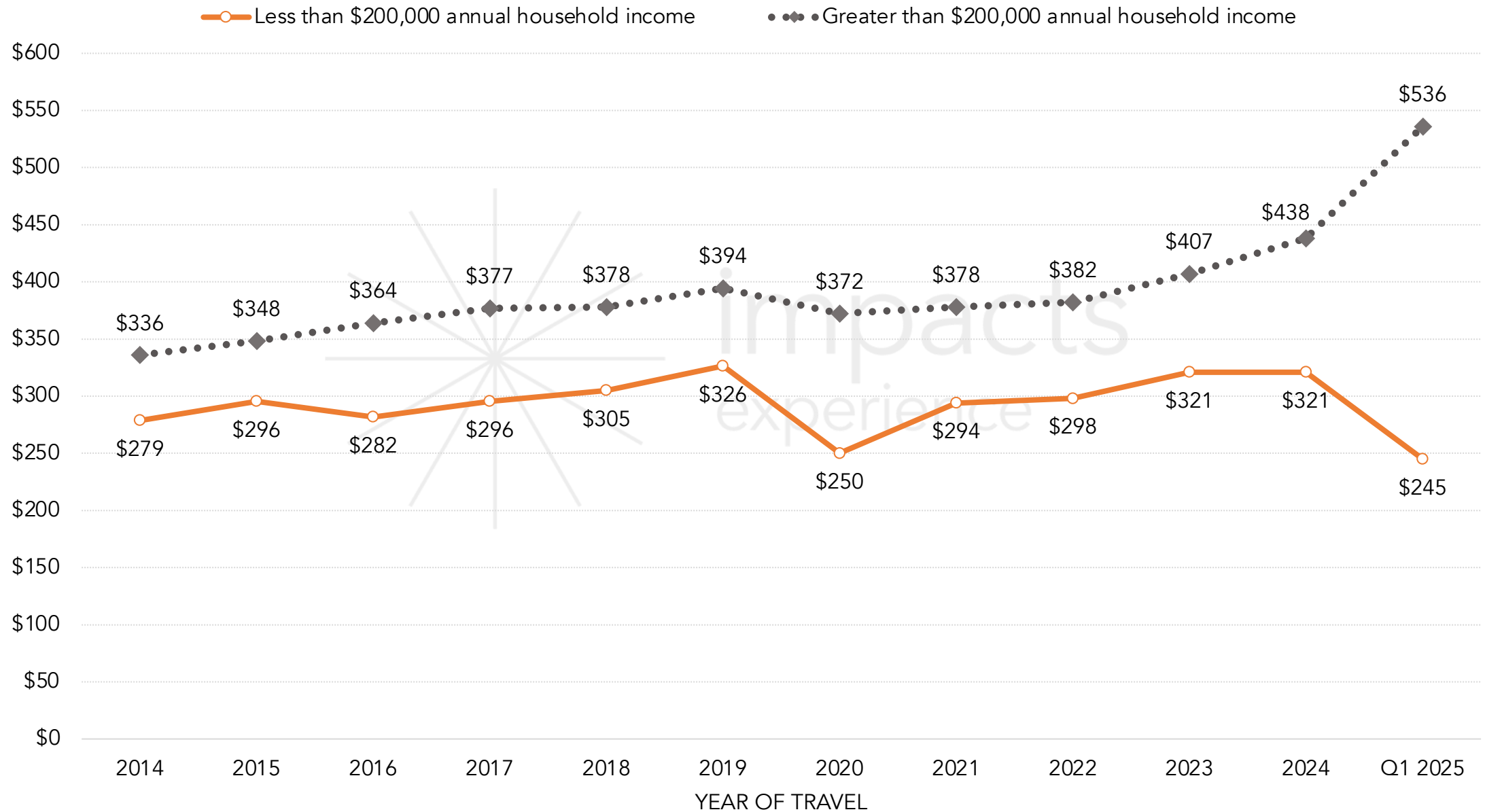
High-propensity visitor daily expected leisure spend

Weekend leisure travel (2-3 nights in destination), Temporal comparison by indicated milestone chronology



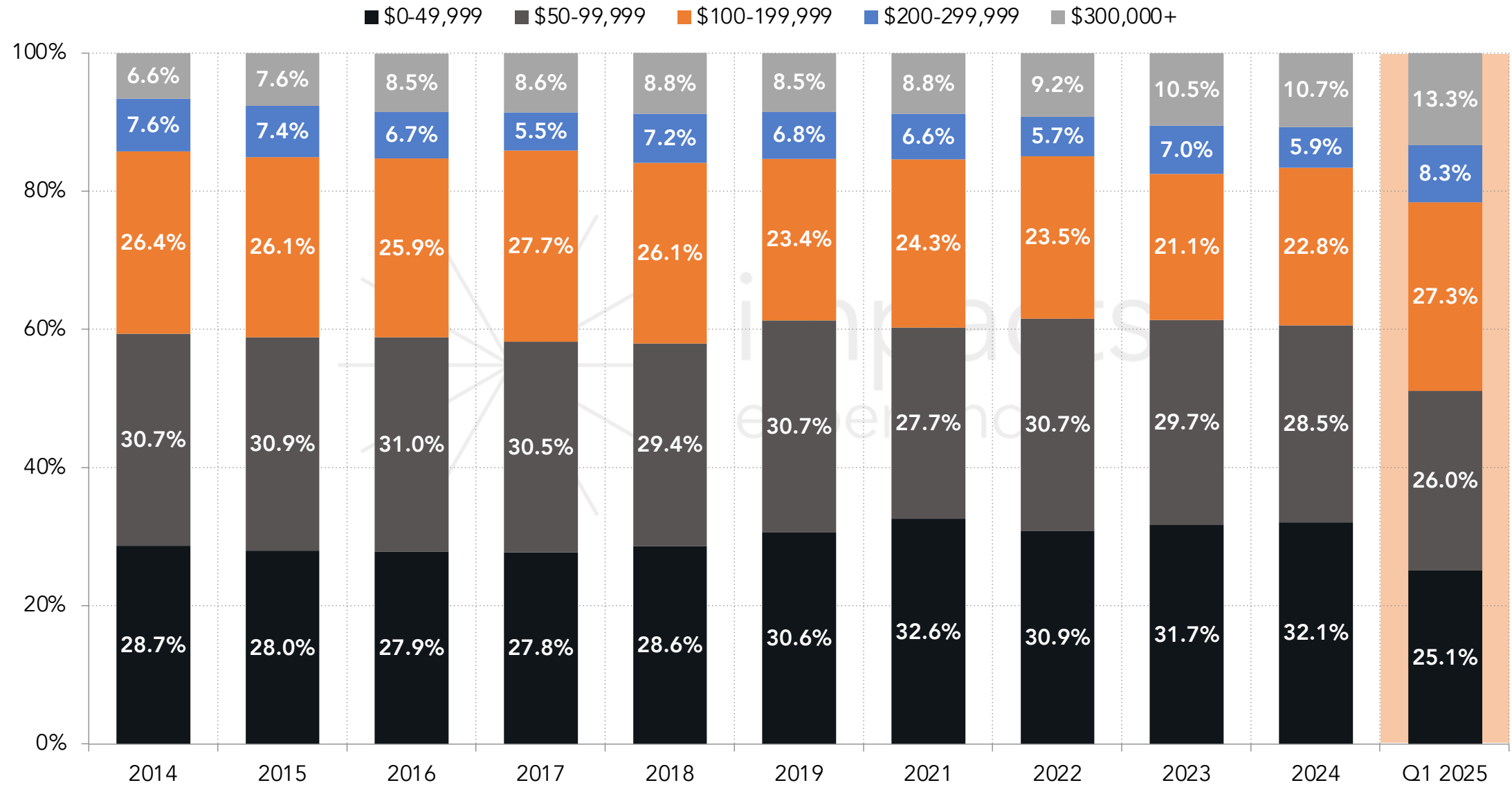
High-propensity visitor daily expected leisure spend


Weeklong leisure travel (4+ nights in destination), Temporal comparison by indicated milestone chronology



Household income of guests

Percentage of guests by indicated household income cohort contemplative of 81 US visitor-serving organizations





It's not necessarily that **more higher income individuals** are visiting museums.

It's that **other guests** are not visiting museums **as much**.

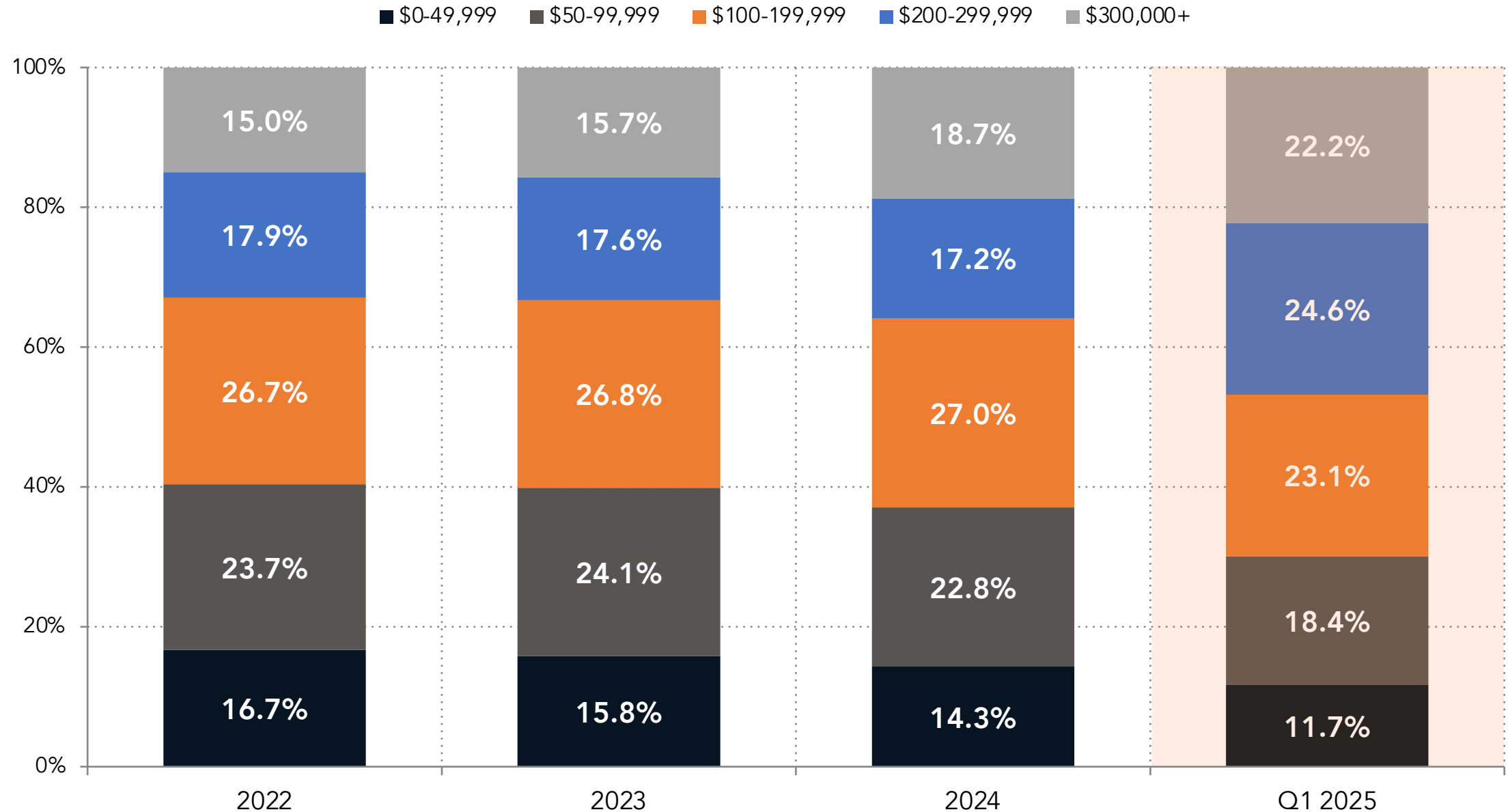
These findings are **not enough to overcome** depressed market potential.



Is this **impacting** member composition?

Household income of participating members

Average household income segmentation of member visits to 81 US exhibit-based cultural organizations



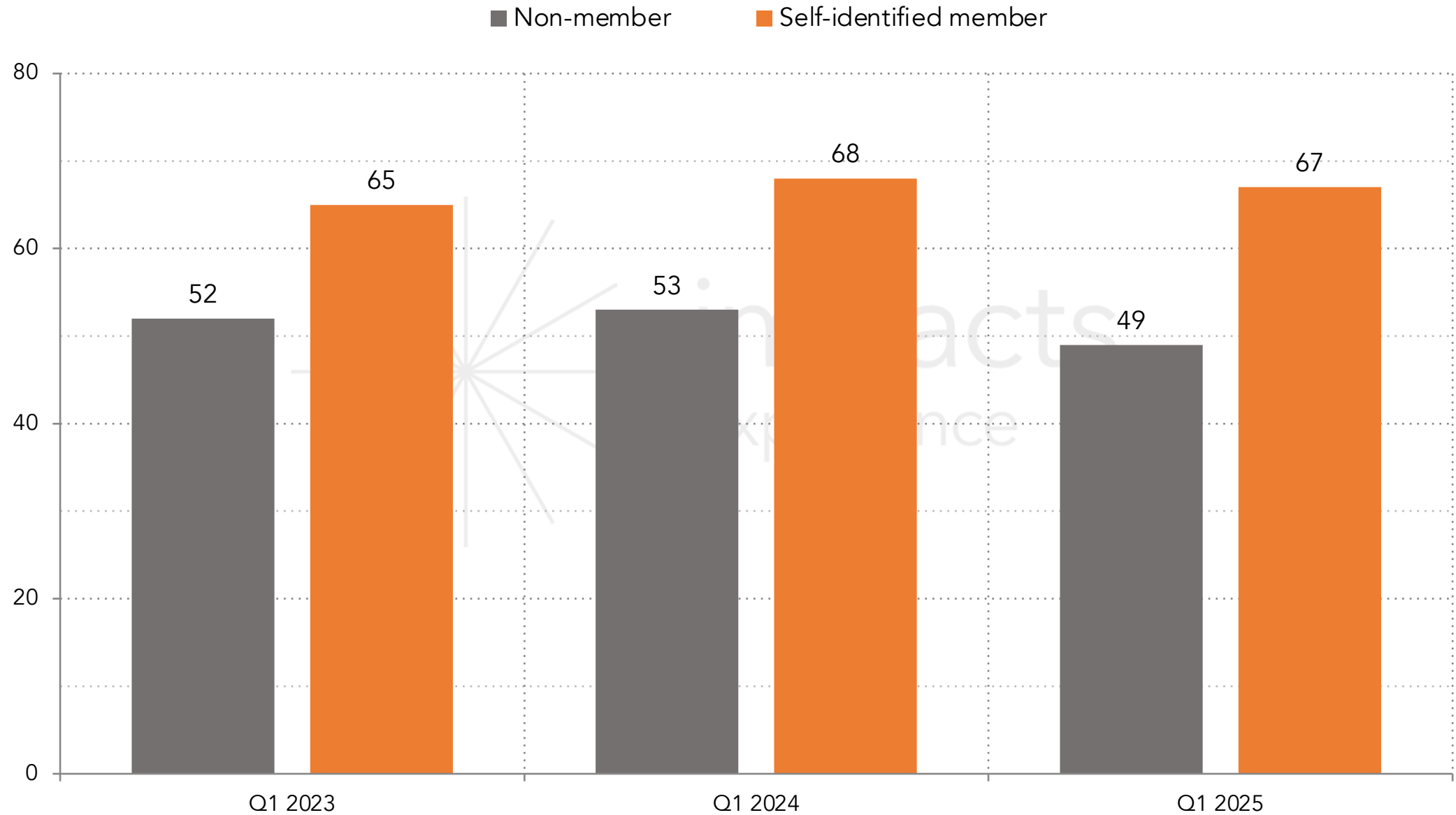
12% of US households have annual income greater than \$200,000.

In Q1 2025, **46.8% of members** had an annual income greater than \$200,000.



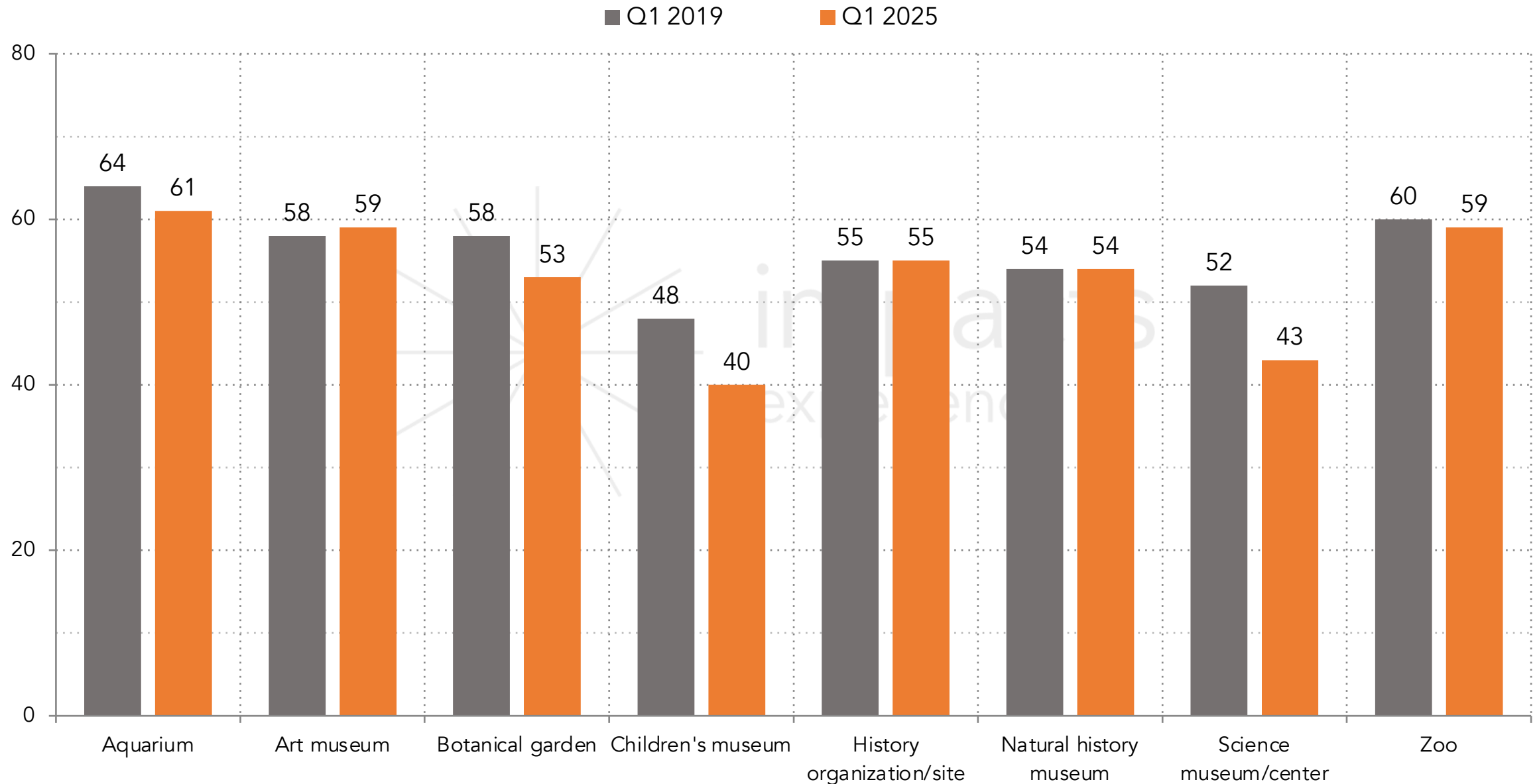
Member intent to visit the **exhibit-based organization**

Intent to visit within one year, Temporal analysis of high-propensity visitors



Member intent to renew: Exhibit-based organizations

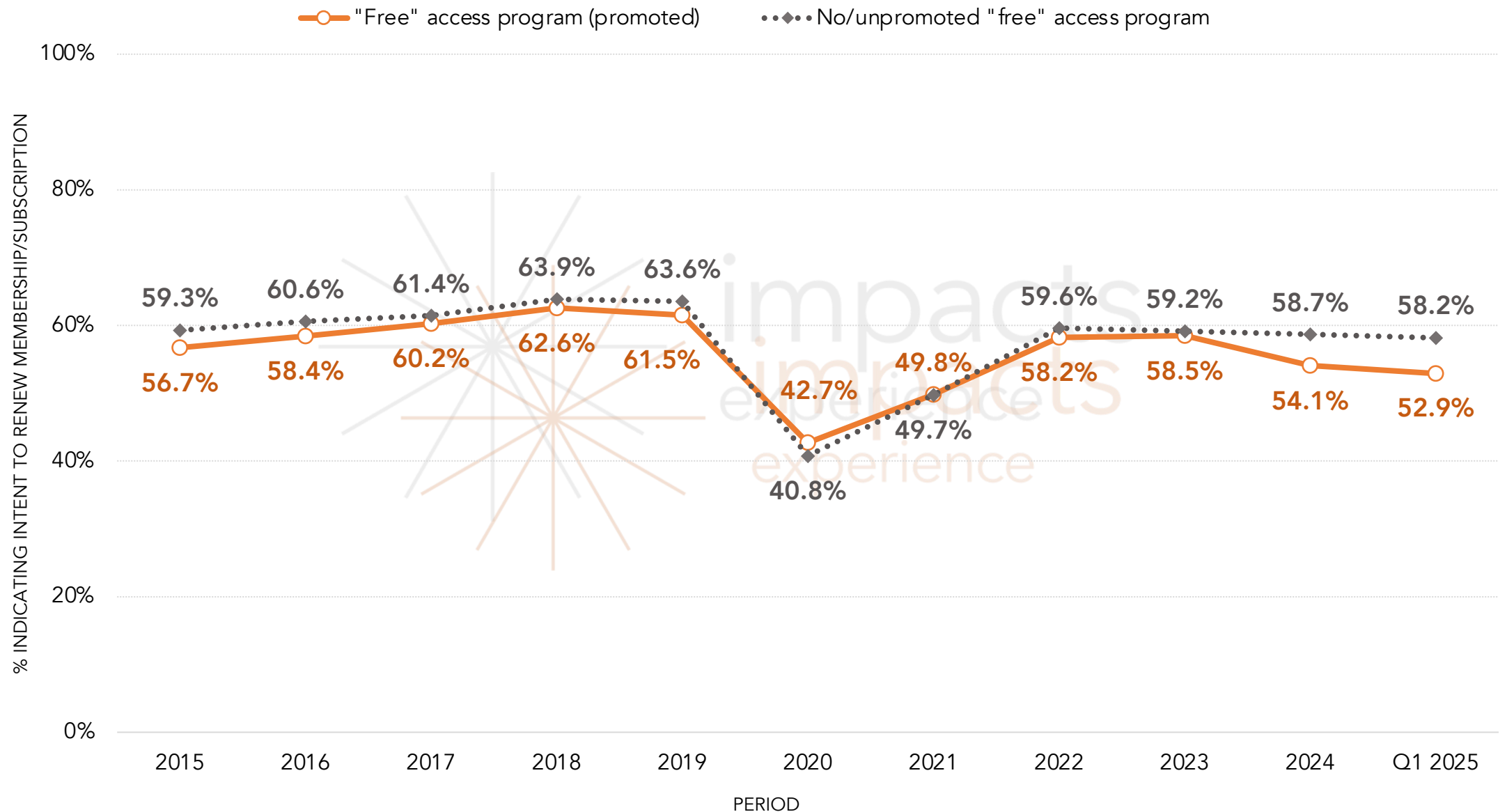
Self-identified current members, Intent to renew membership



Another reason membership renewals and acquisitions are down: **Unintended consequences** of broad, less targeted access initiatives.

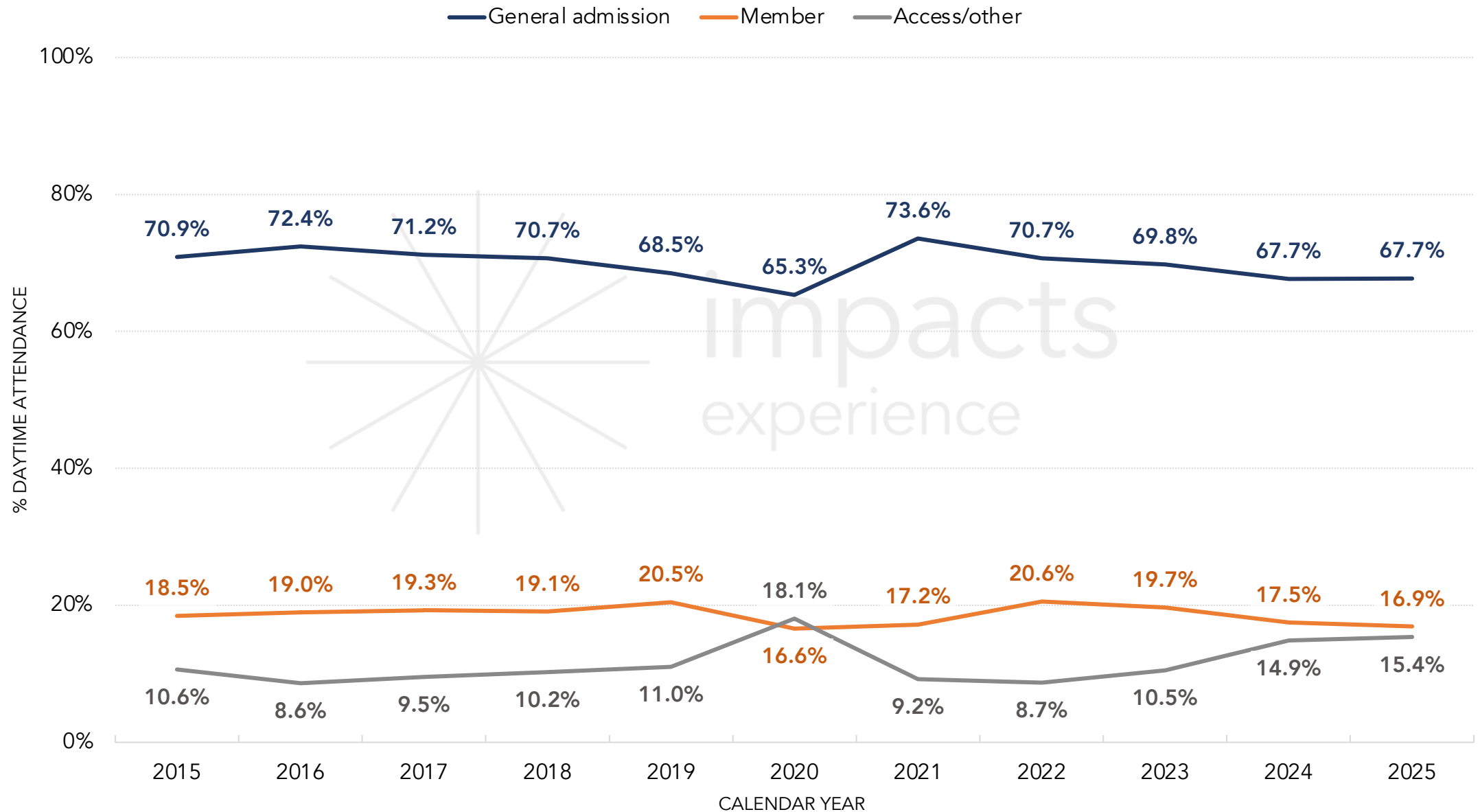
Intent to renew membership

Self-identified members to 23 United States exhibit-based cultural organizations
(annual membership cost is less than \$300)



Adult onsite participation by visitation category

23 exhibit-based US cultural organizations





How do we **fix this?**

There's one membership trend that
encompasses many others:

Highlighting your mission as a
primary membership benefit.

“What is the **top thing** that you can do to support the mission of the museum?”



What are the three best things that you can do to support the mission of the museum ?

US cultural exhibit-based high-propensity visitors, Lexical analysis by descending frequency of mention

| RANK | DESCRIPTION | EOY 2019 VALUE | EOY 2024 VALUE | PERCENT CHANGE |
|------|--|-------------------|-------------------|-------------------|
| 1 | Join the organization/become a member | 147.5 | 172.3 | +16.8% |
| 2 | Donate to the organization | 147.1 | 150.2 | +2.1% |
| 3 | Buy a ticket to the organization | 142.8 | 133.0 | -6.9% |
| 4 | Encourage others to visit the organization | 112.3 | 125.9 | +12.1% |
| 5 | Bring family and friends to visit the organization | 90.2 | 100.5 | +11.4% |



Let's discuss:

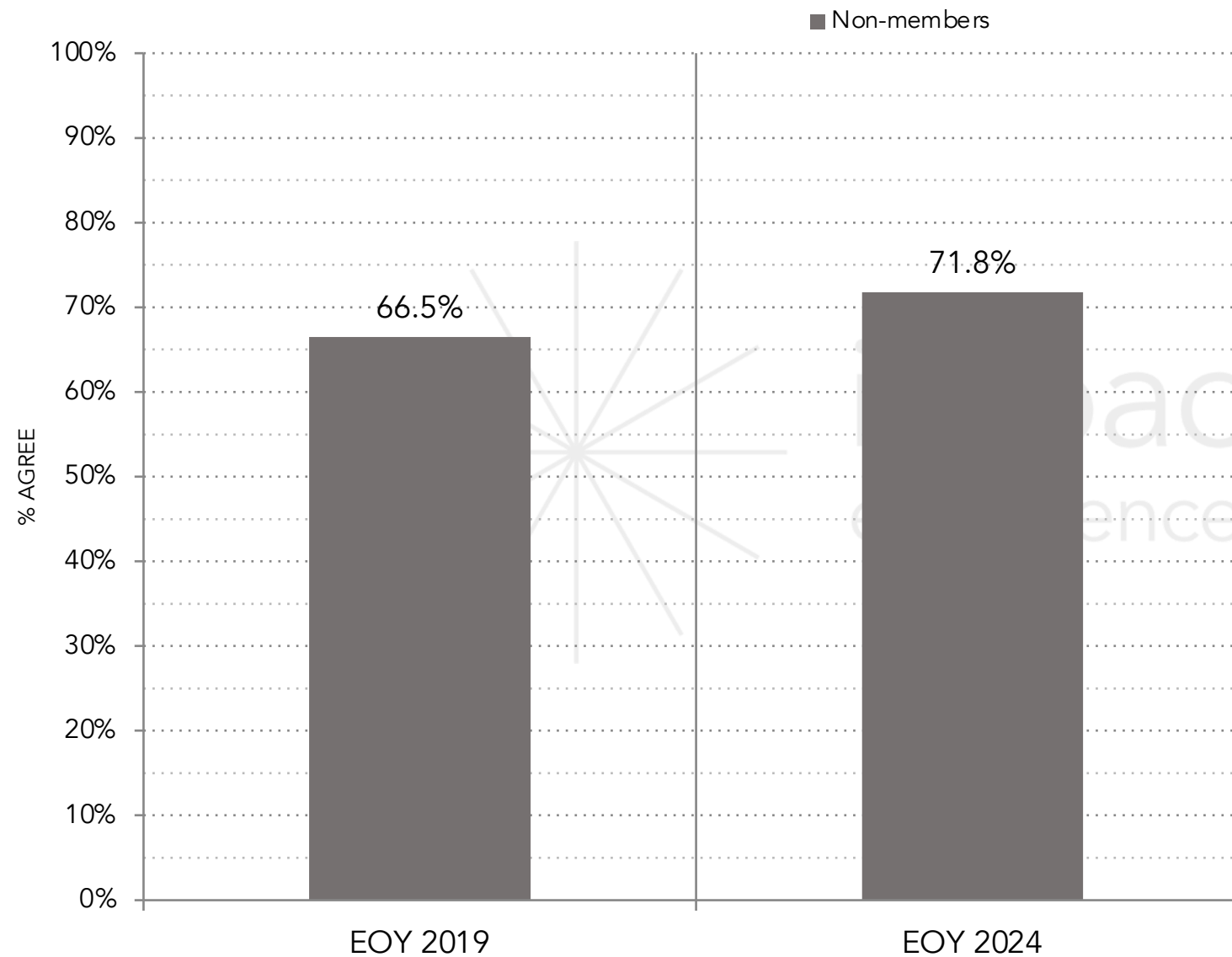
1. The power of trust in museums
2. The growth in mission-motivated members
3. Which membership subset is leading this trend
4. Why this is happening



The power of **trust** in museums

I trust the ... *

US adults, percentage of respondents who "agree" or "strongly agree"

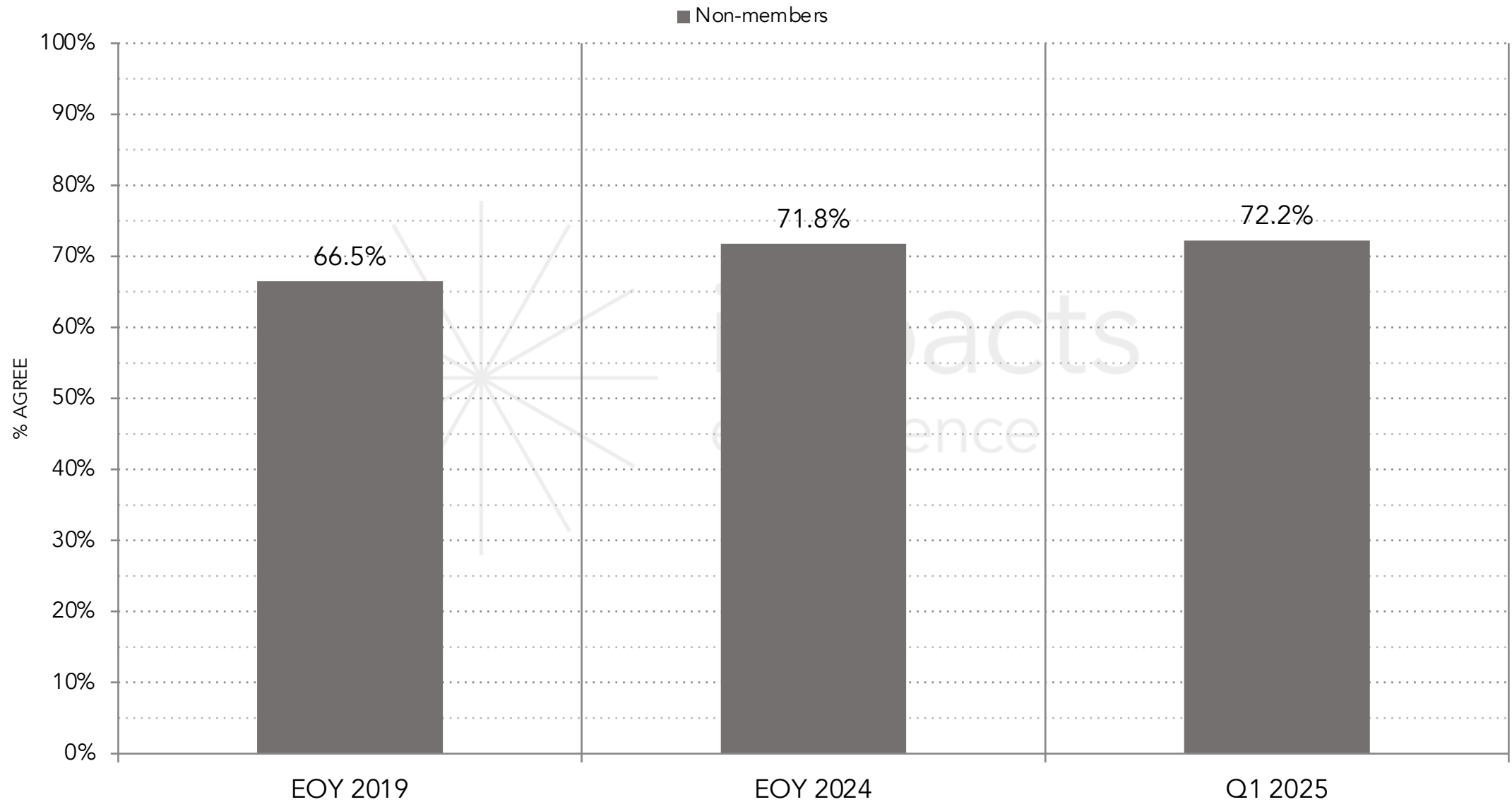


*Among visitor-serving organizations with annual onsite participation of 10,000 or more.

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I trust the ... *

US adults, percentage of respondents who "agree" or "strongly agree"

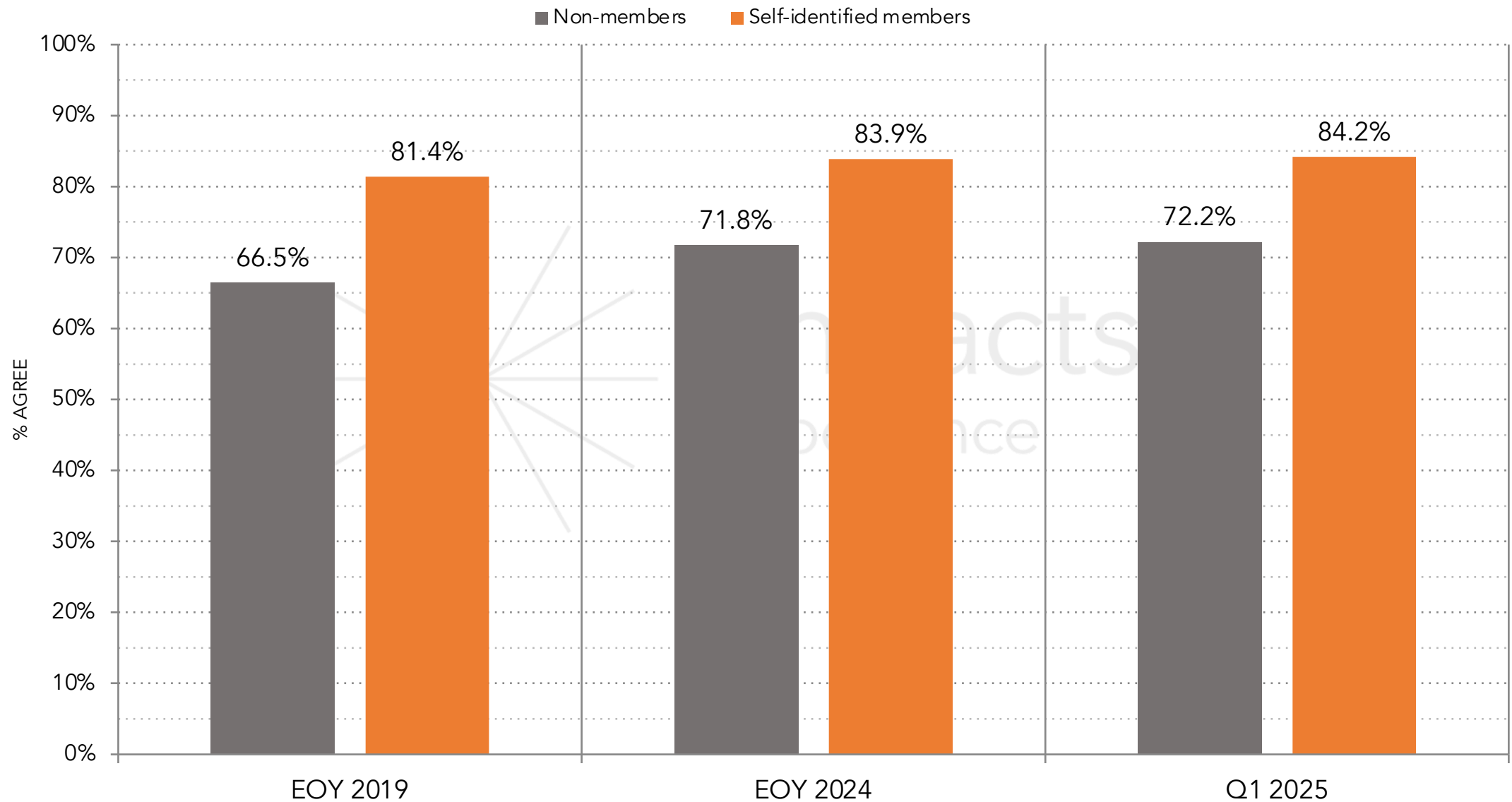


*Among visitor-serving organizations with annual onsite participation of 10,000 or more.

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I trust the ... *

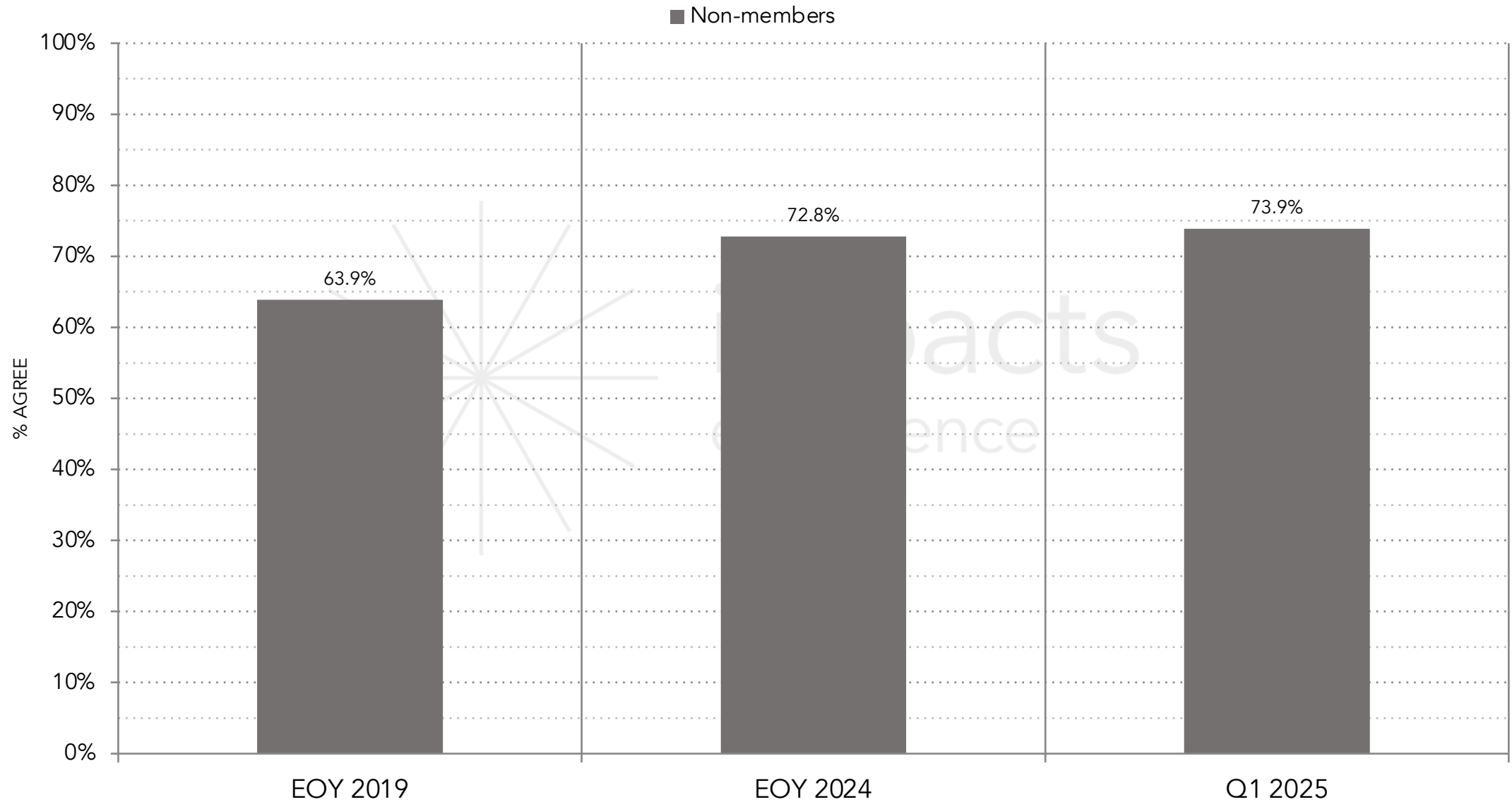
US adults, percentage of respondents who "agree" or "strongly agree"



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...is a highly credible source of information.*
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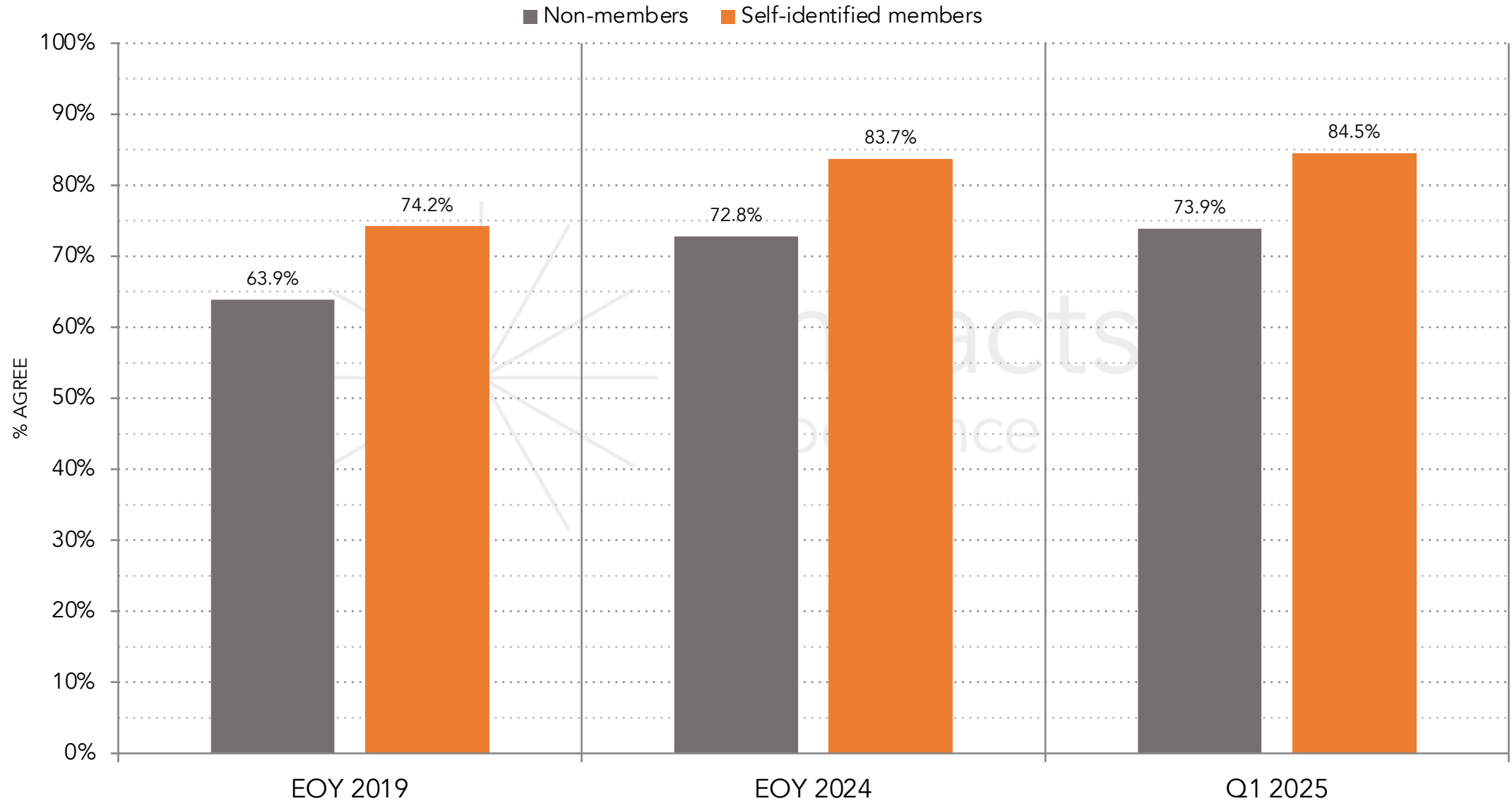


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US adults, percentage of respondents who "agree" or "strongly agree"

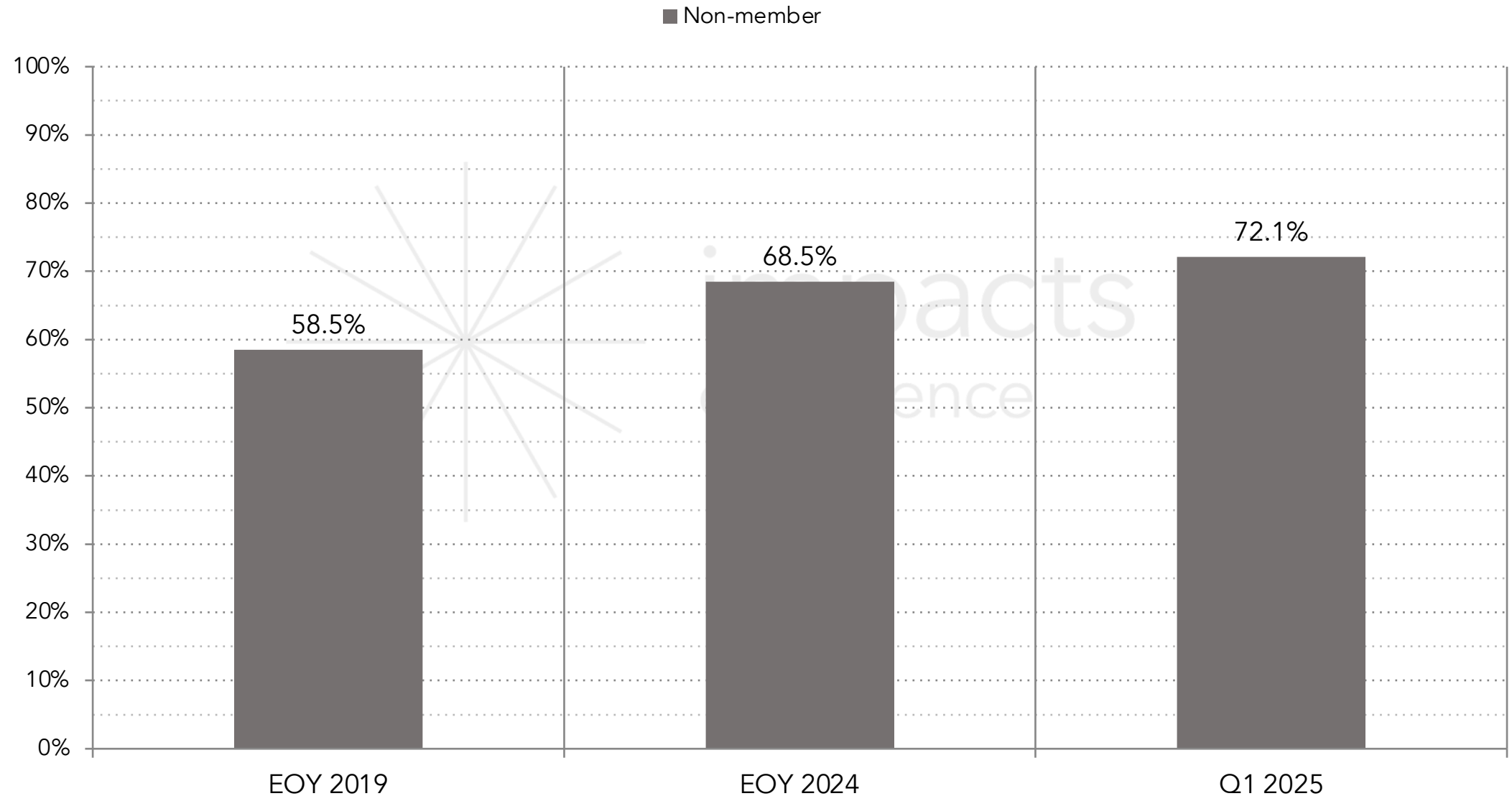


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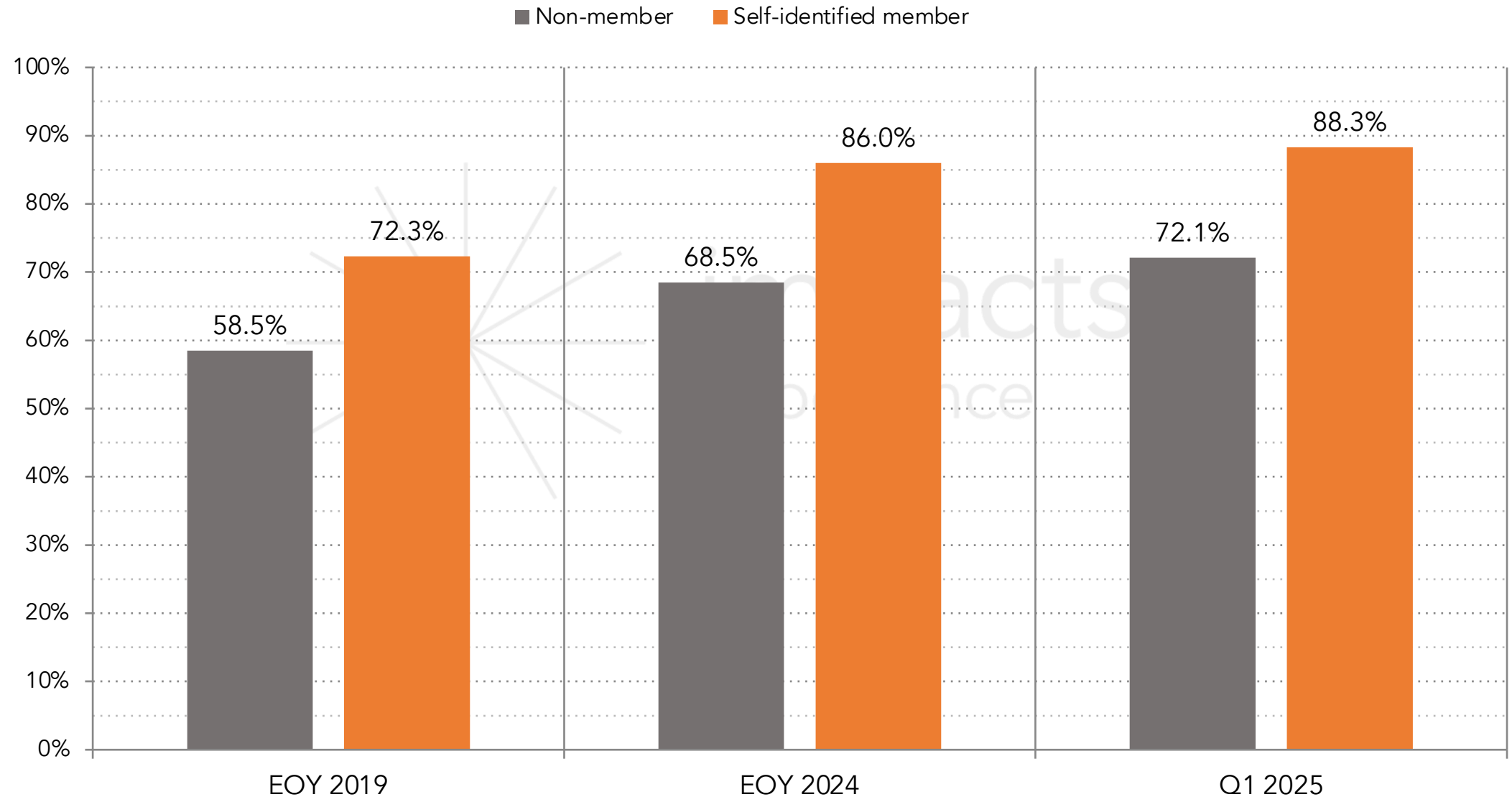
“The ... should suggest or recommend certain behaviors or ways for the general public to support its causes and mission.”

Self-identified member v. non-member comparison to exhibit-based organizations, Percentage of US adults who “agree” or “strongly agree”



“The ... should suggest or recommend certain behaviors or ways for the general public to support its causes and mission.”

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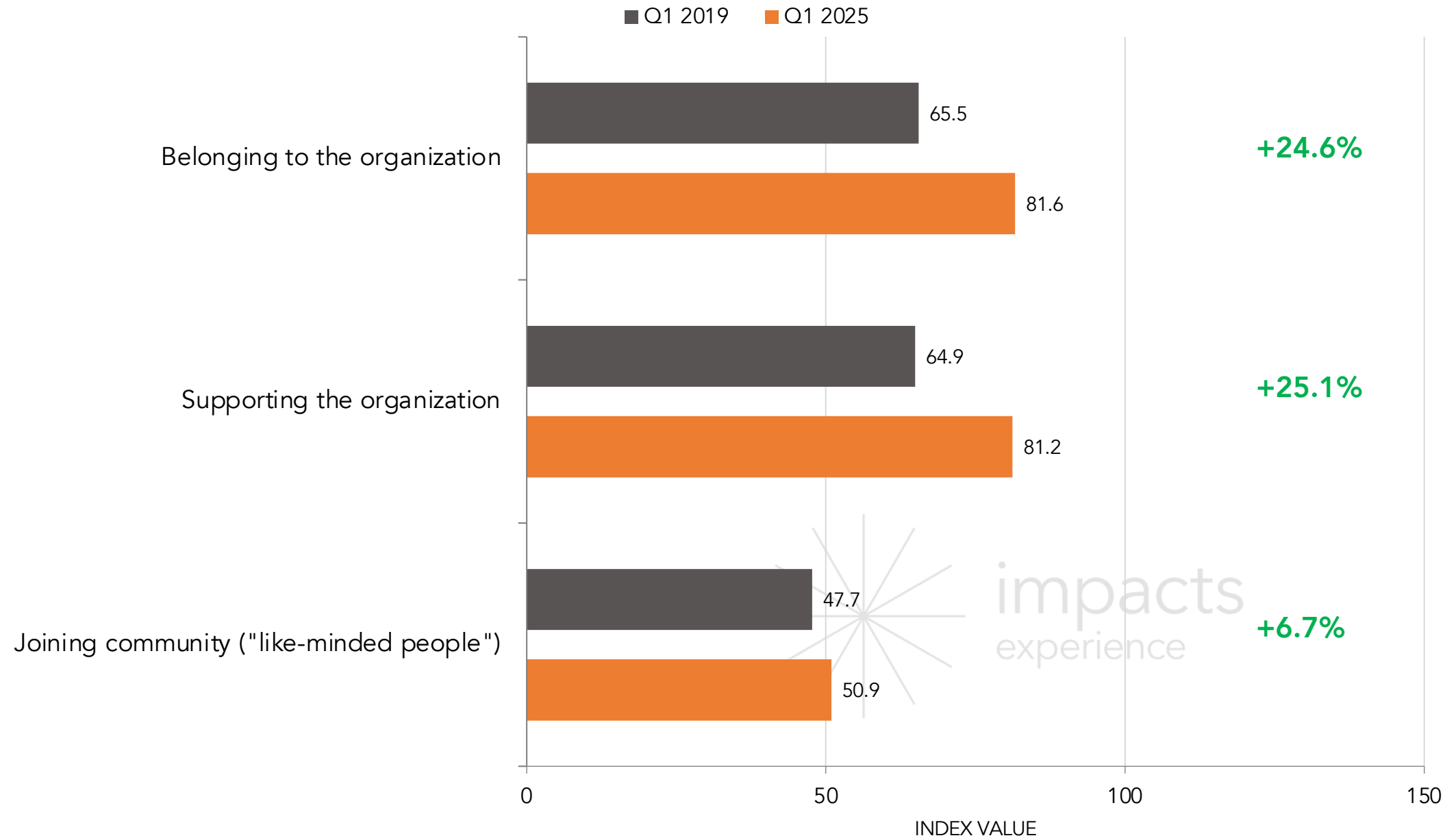




The growth in **mission-motivated** members

What is the primary benefit of your membership?

Self-identified members to 81 organizations, Temporal comparison

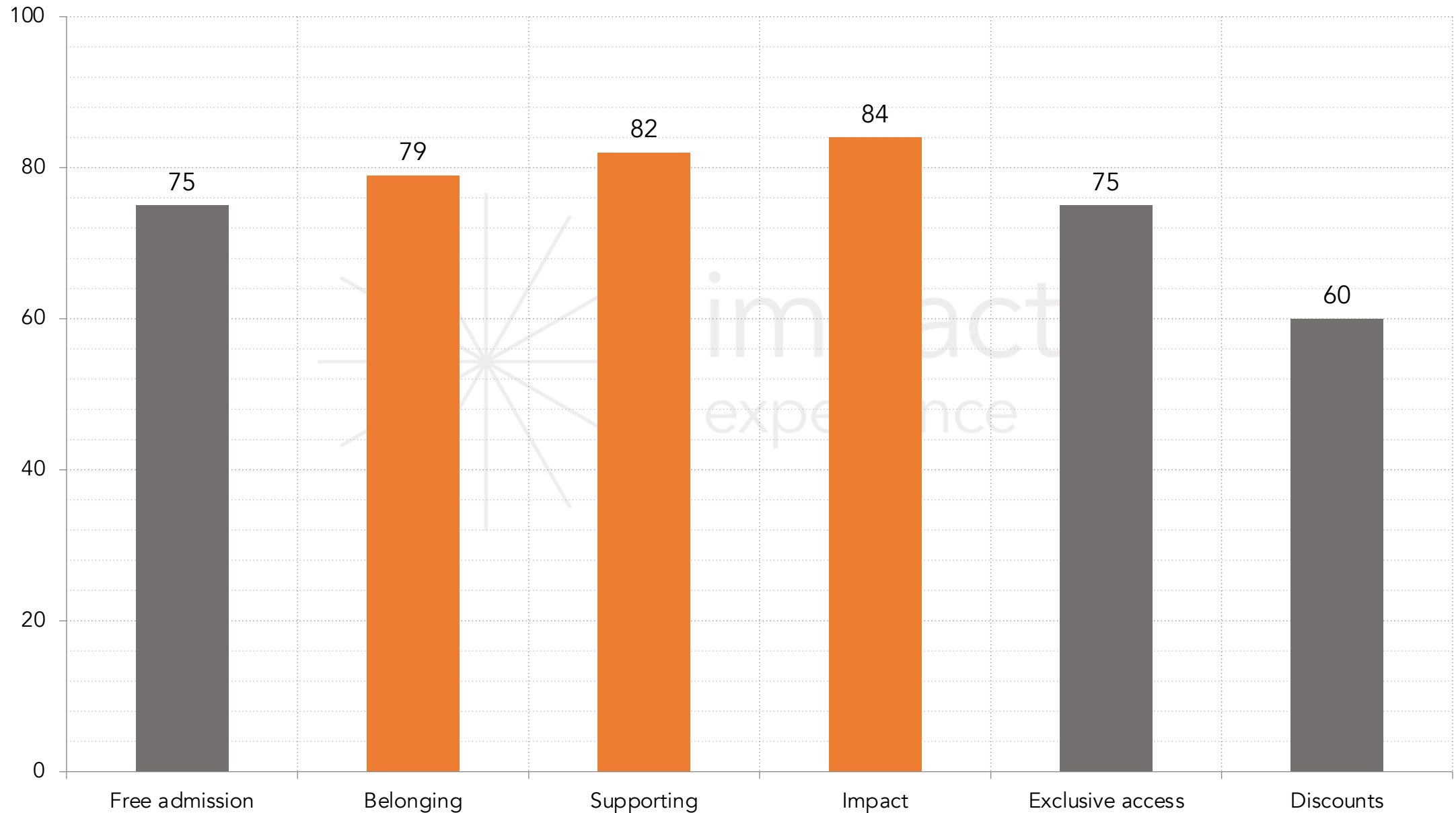


"Belonging to the organization"
and **"supporting the organization"**
are the second and third fastest
growing primary membership benefit
since 2019.

And members who are primarily **mission-motivated** are arguably an institution's most important members.

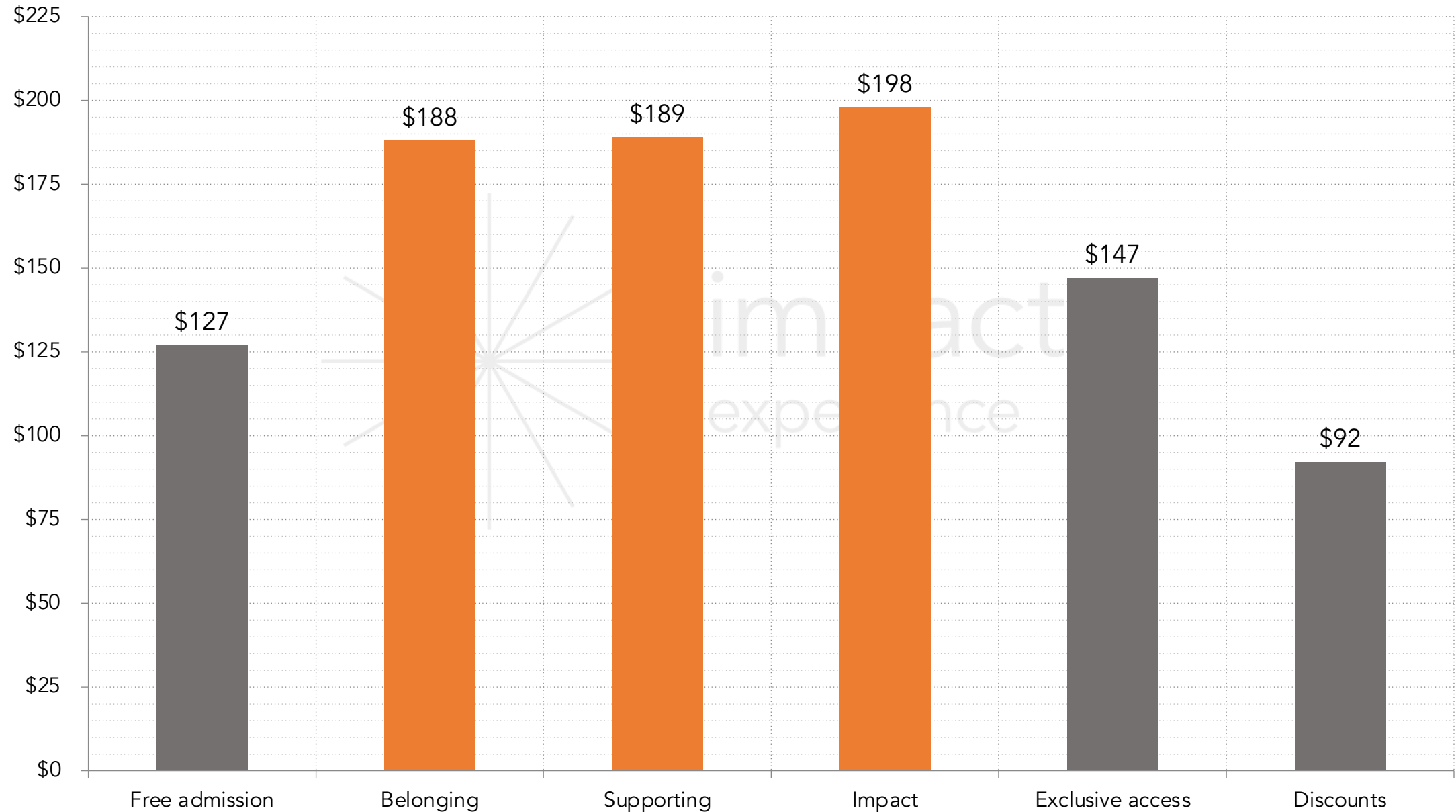
Value for membership cost by primary member benefit

Self-identified US cultural exhibit-based member, EOY 2024



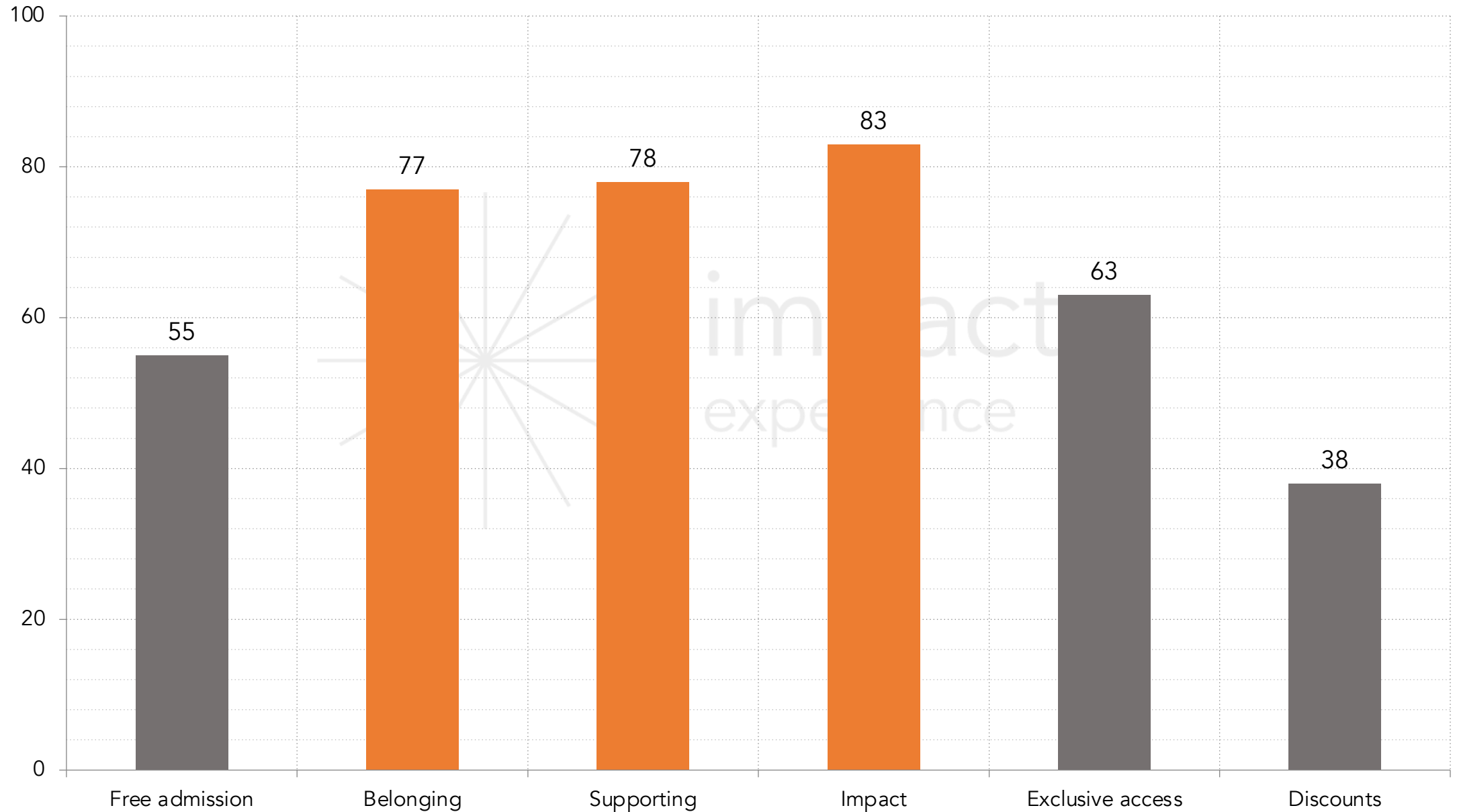
Average annual membership cost by primary member benefit

Self-identified US cultural exhibit-based member, EOY 2024



Propensity to renew by primary member benefit

Self-identified US cultural exhibit-based member, EOY 2024

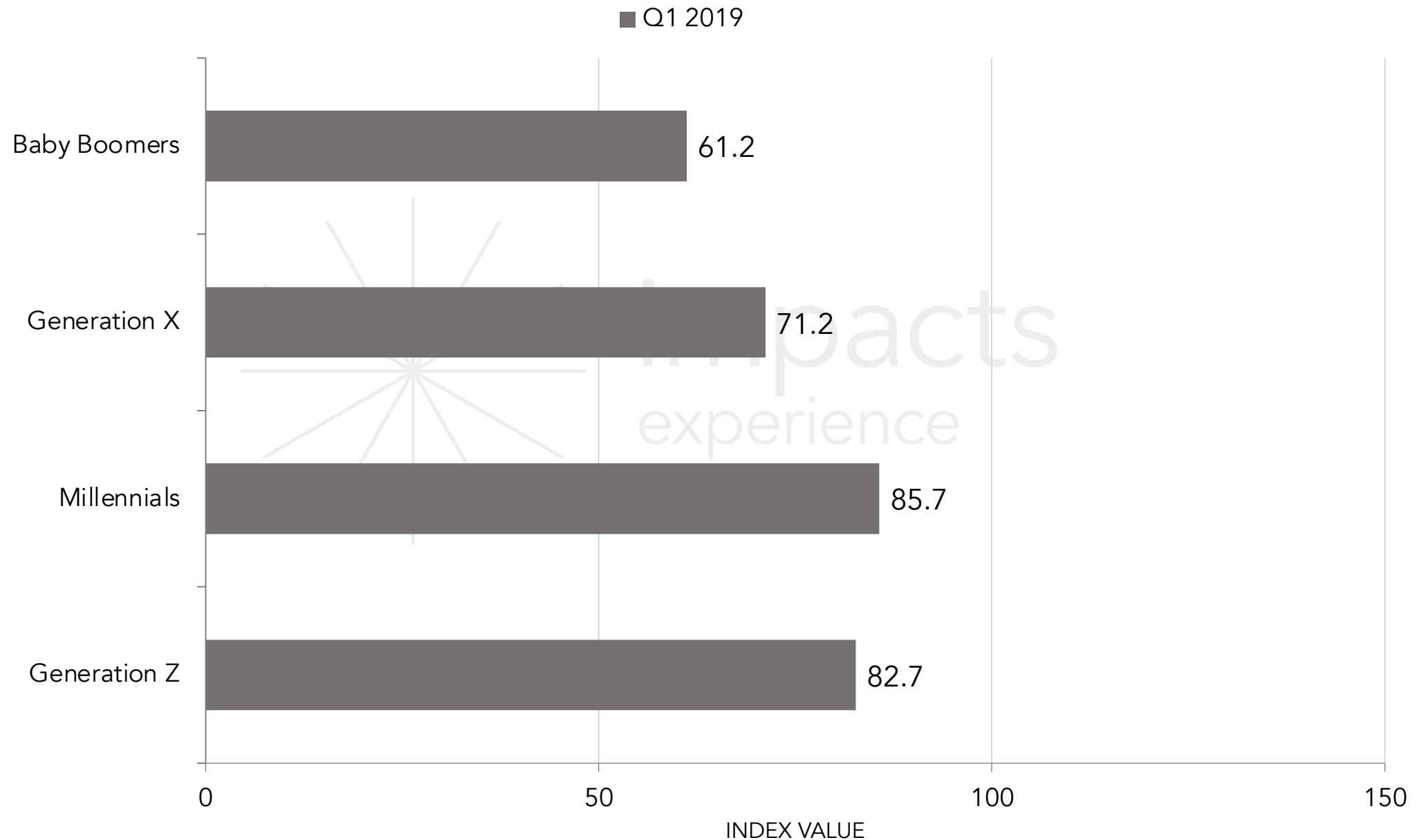




Which **membership subset** is driving this trend?

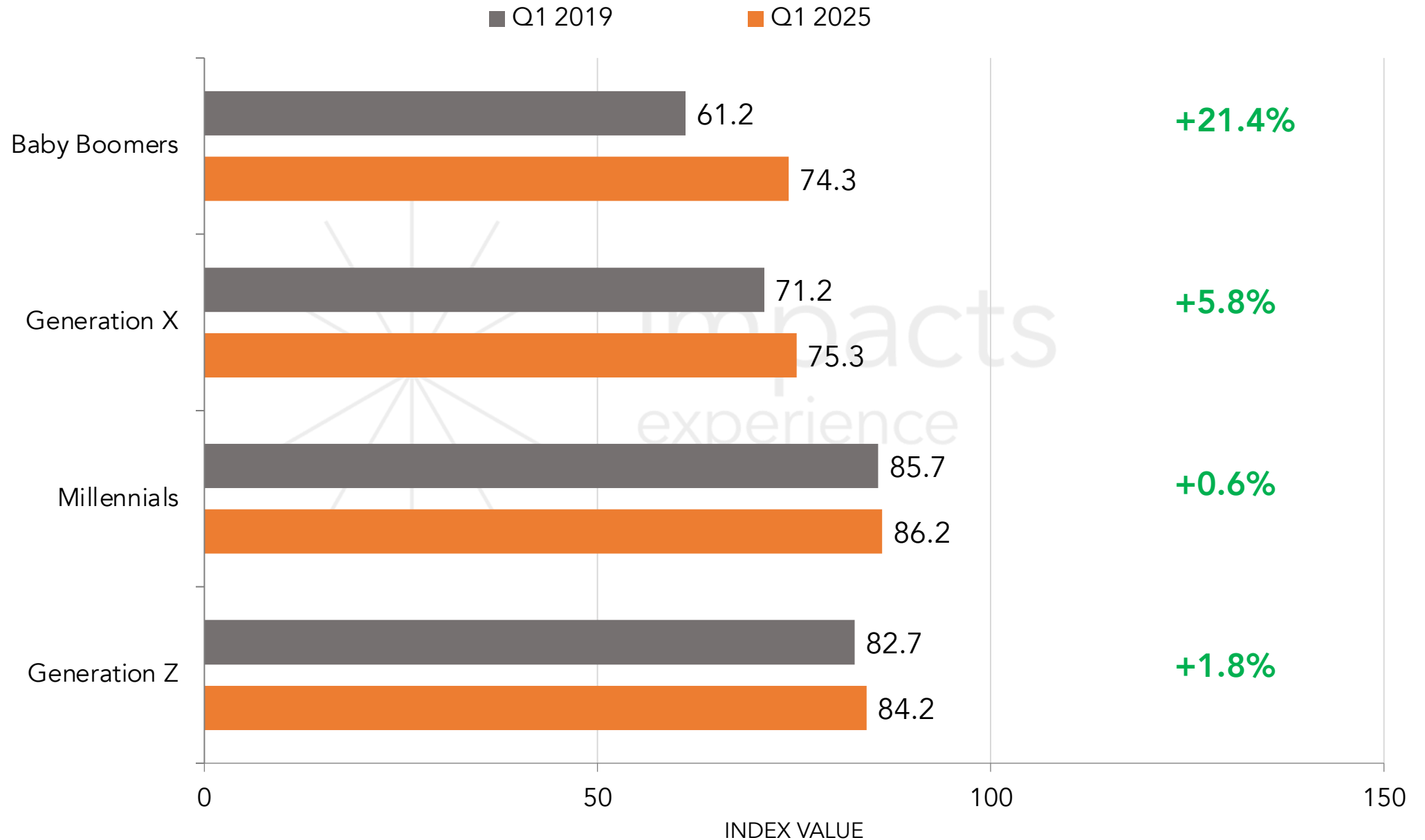
Supporting the organization

Self-identified members by generational cohort, "What is the primary benefit of membership?"



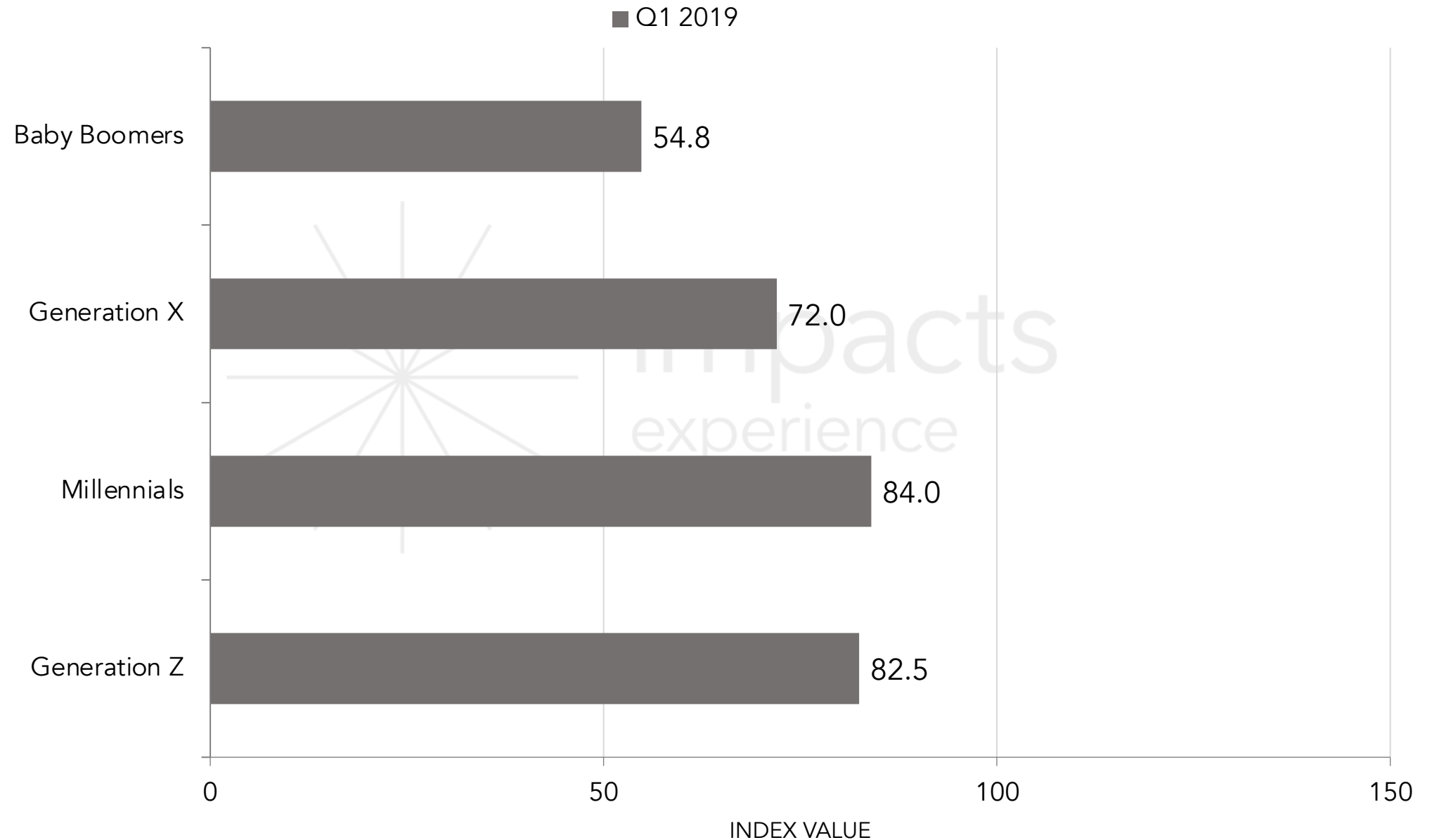
Supporting the organization

Self-identified members by generational cohort, "What is the primary benefit of membership?"



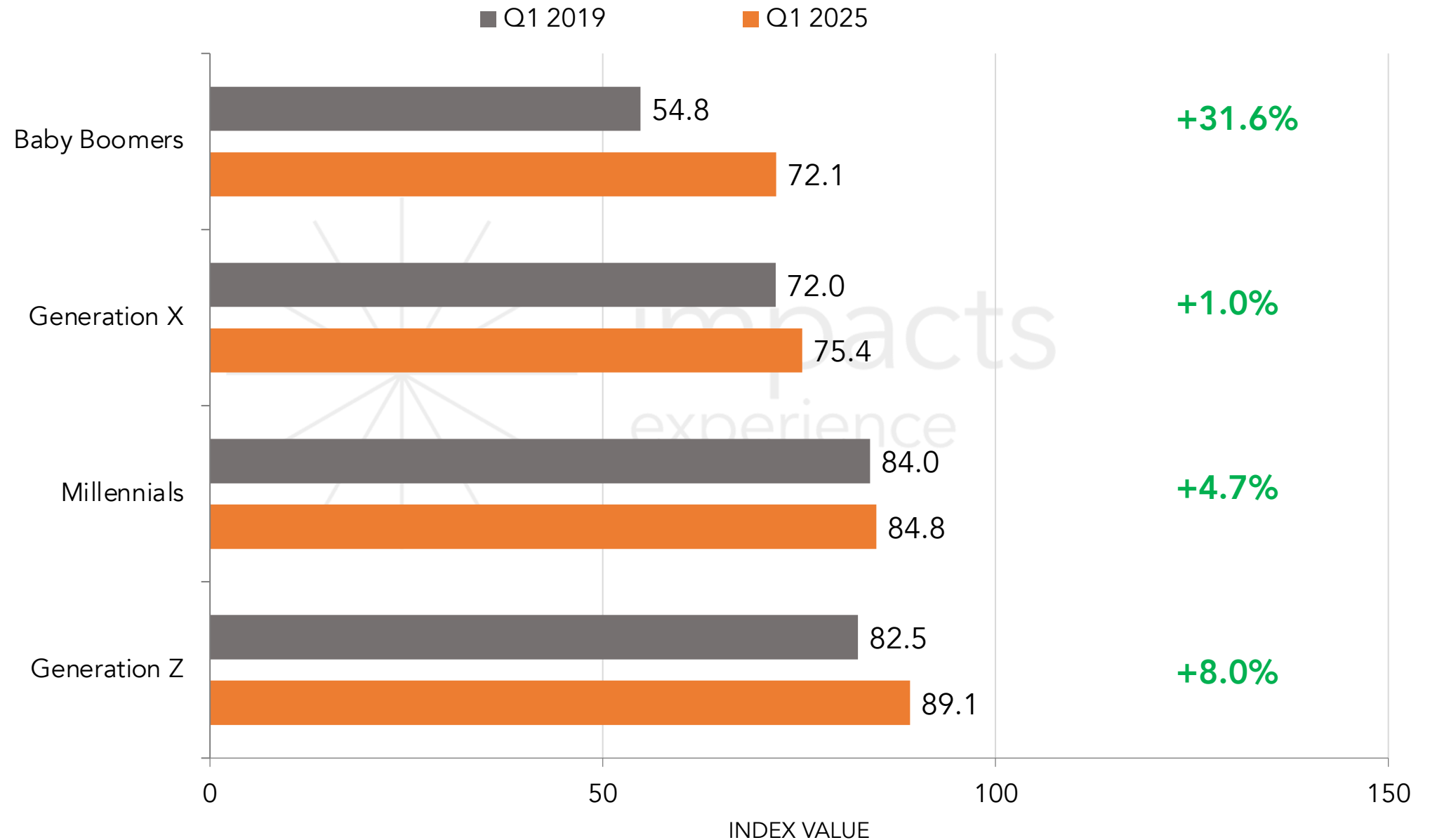
Belonging to the organization

Self-identified members by generational cohort, "What is the primary benefit of membership?"



Belonging to the organization

Self-identified members by generational cohort, "What is the primary benefit of membership?"



Younger generations find
greater value in your mission.

But older generations have
experienced the **most growth**.

But museum
membership programs
have an **opportunity.**



Average adult age by exhibit-based organization type

US adults, EOY 2024

| ORGANIZATION TYPE | Average age | | AGE DIFFERENCE |
|-------------------|-------------|------------|----------------|
| | MEMBER | NON-MEMBER | |

Average adult age by exhibit-based organization type

US adults, EOY 2024

| ORGANIZATION TYPE | Average age | | AGE DIFFERENCE |
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| Botanical garden | 57 | 44 | -13 |

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| Botanical garden | 57 | 44 | -13 |
| Natural history museum | 45 | 37 | -8 |

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| Botanical garden | 57 | 44 | -13 |
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| Art museum | 45 | 36 | -9 |

Average adult age by exhibit-based organization type

US adults, EOY 2024

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|------------------------|-------------|------------|----------------|
| | MEMBER | NON-MEMBER | |
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| Natural history museum | 45 | 37 | -8 |
| Art museum | 45 | 36 | -9 |
| History museum/site | 44 | 39 | -5 |

Average adult age by exhibit-based organization type

US adults, EOY 2024

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| | MEMBER | NON-MEMBER | |
| Botanical garden | 57 | 44 | -13 |
| Natural history museum | 45 | 37 | -8 |
| Art museum | 45 | 36 | -9 |
| History museum/site | 44 | 39 | -5 |
| Science museum/center | 42 | 34 | -8 |

Average adult age by exhibit-based organization type

US adults, EOY 2024

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| Botanical garden | 57 | 44 | -13 |
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| Art museum | 45 | 36 | -9 |
| History museum/site | 44 | 39 | -5 |
| Science museum/center | 42 | 34 | -8 |
| Zoo | 39 | 35 | -4 |

Average adult age by exhibit-based organization type

US adults, EOY 2024

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| | MEMBER | NON-MEMBER | |
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| History museum/site | 44 | 39 | -5 |
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| Zoo | 39 | 35 | -4 |
| Aquarium | 39 | 33 | -6 |

Average adult age by exhibit-based organization type

US adults, EOY 2024

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| Art museum | 45 | 36 | -9 |
| History museum/site | 44 | 39 | -5 |
| Science museum/center | 42 | 34 | -8 |
| Zoo | 39 | 35 | -4 |
| Aquarium | 39 | 33 | -6 |
| Children's museum | 38 | 39 | +1 |

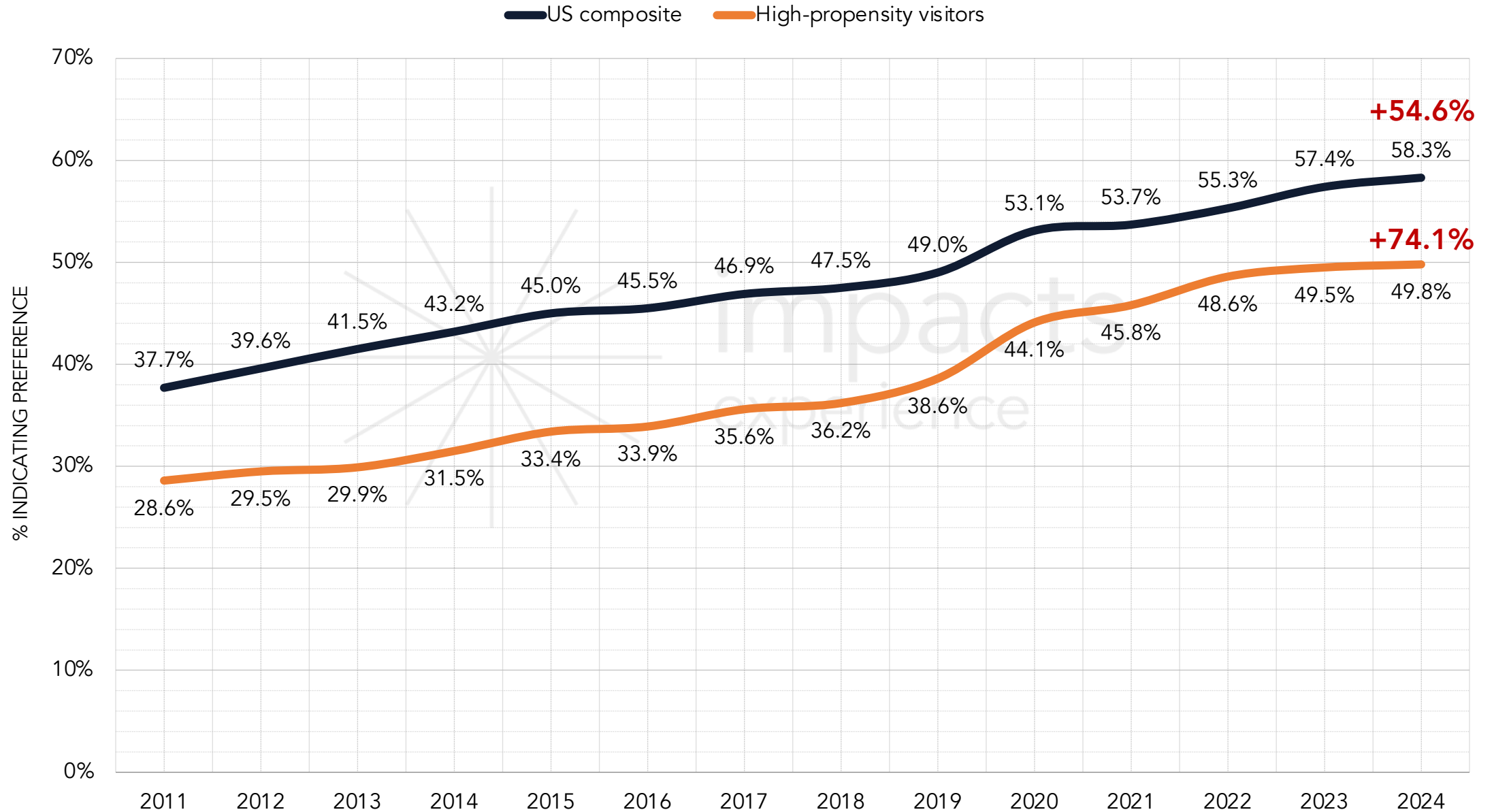


Why is this trend toward **mission-driven memberships** happening?

(Remember this chart?)

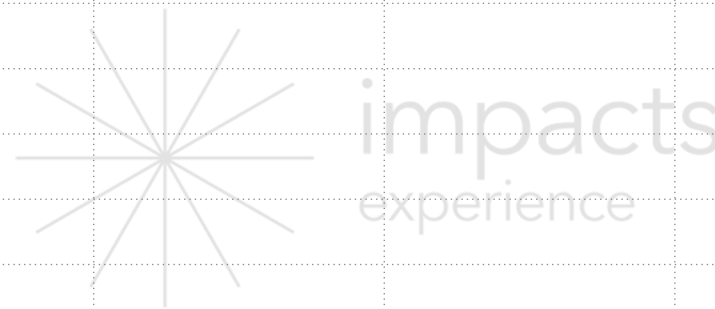
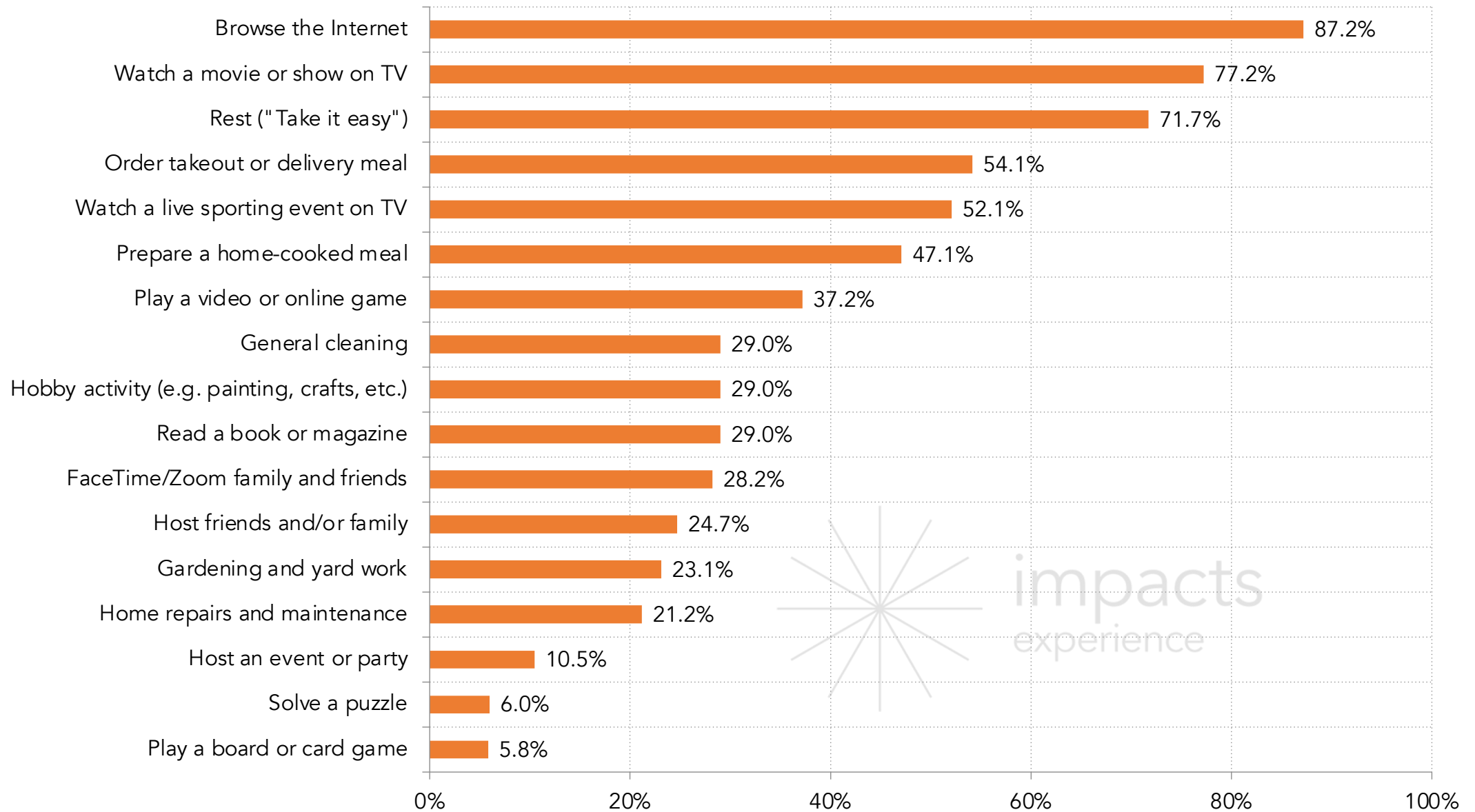
"Stay home" during weekend preference

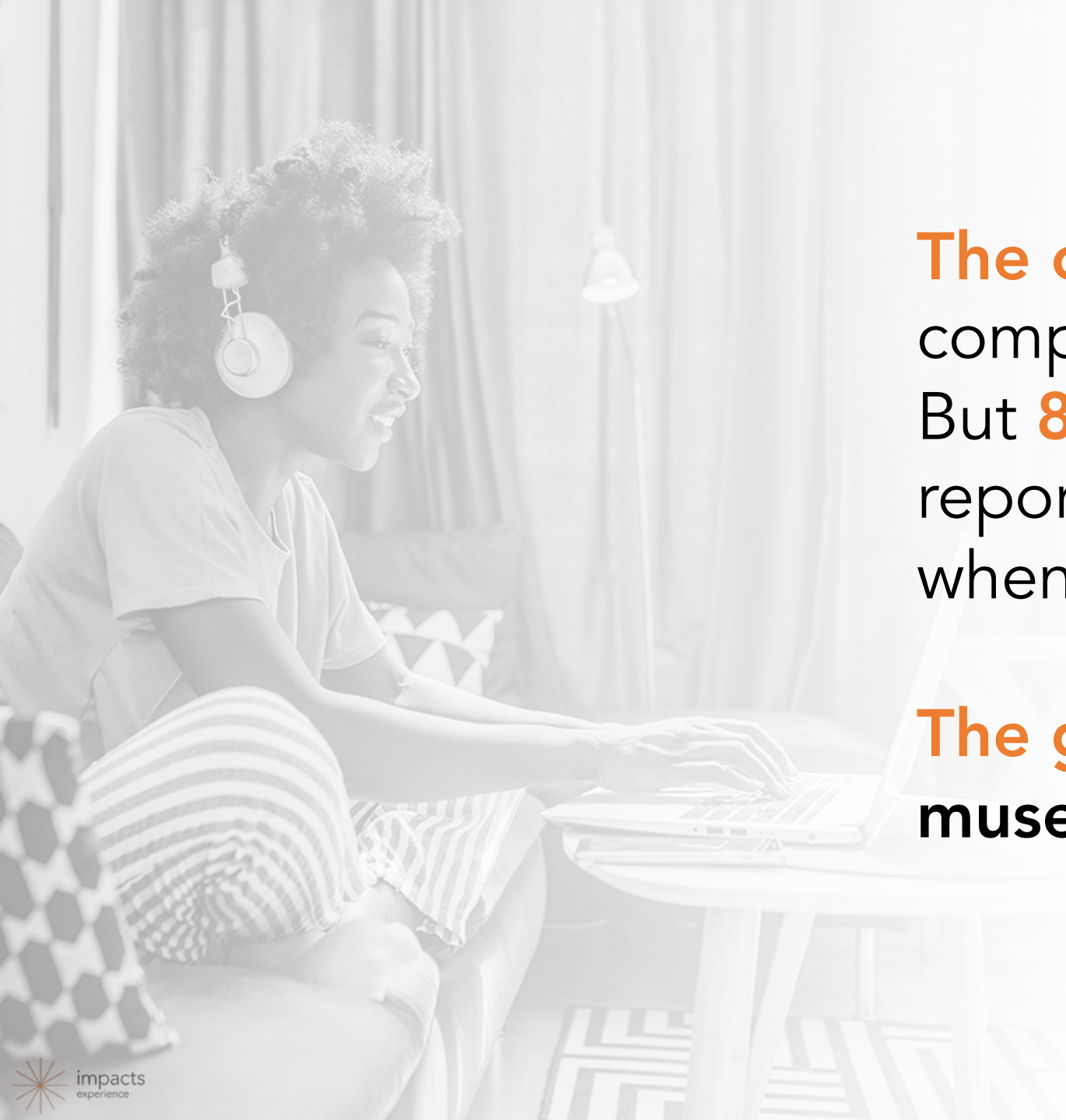
EOY 2011-2024



Home-based activities

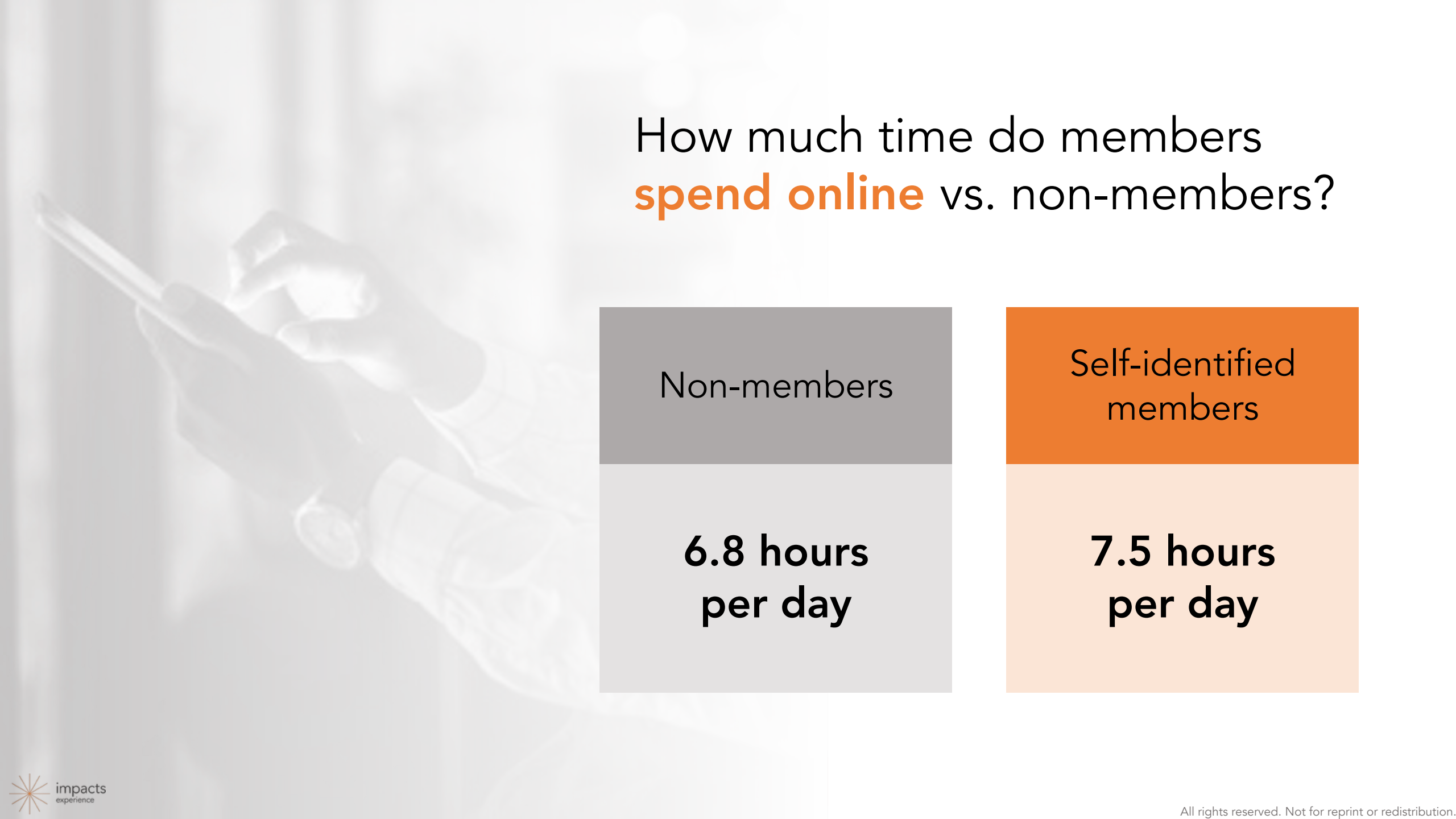
US adults, Q1 2025



A woman with curly hair is sitting on a couch, wearing large headphones and smiling while looking at a laptop on a small table in front of her. The background shows a living room with curtains and a lamp.

The couch is a growing competitor for leisure time. But **87.2% of US adults** report spending time online when they are at home.

The good news: Your museum is online as well.



How much time do members
spend online vs. non-members?

Non-members

**6.8 hours
per day**

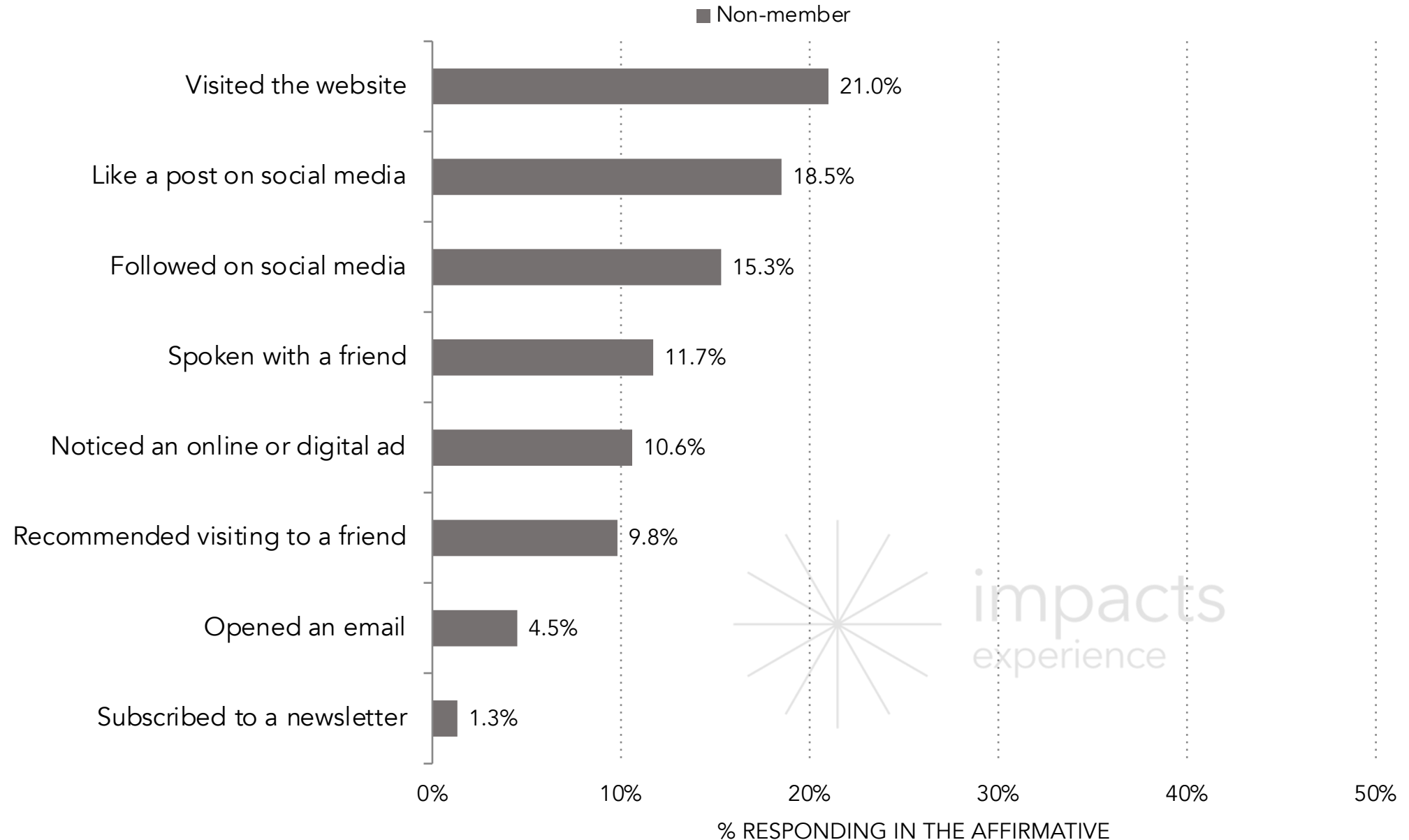
Self-identified
members

**7.5 hours
per day**

Meet your audiences where
they are: **They are online.**

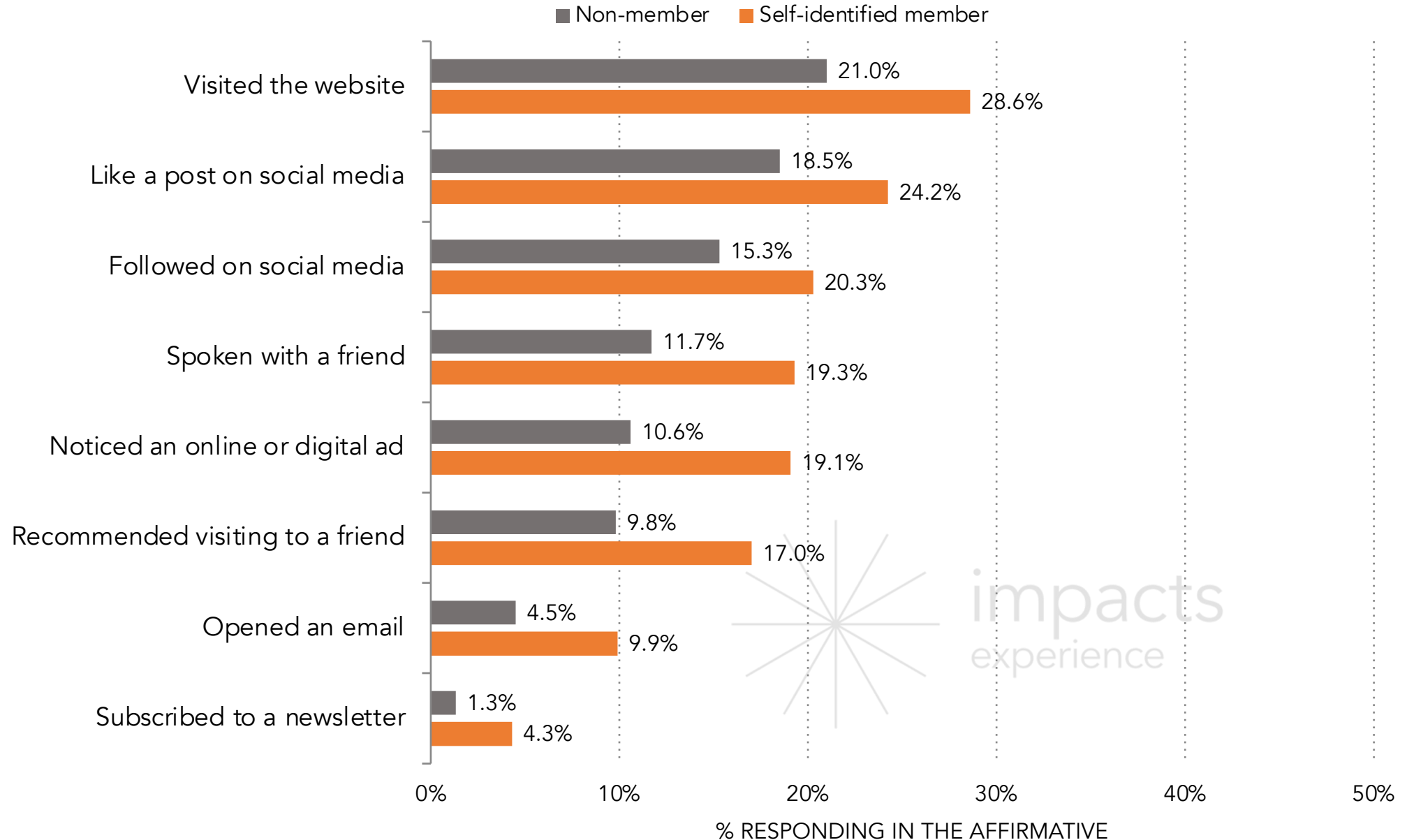
"In the past year have you... in relation to the museum?"

Precedent unaided awareness + Affirmative intent-to-visit, EOY 2024



"In the past year have you... in relation to the museum?"

Precedent unaided awareness + Affirmative intent-to-visit, EOY 2024



When your museum promotes **mission-related messaging** online, it's also cultivating **potential members.**





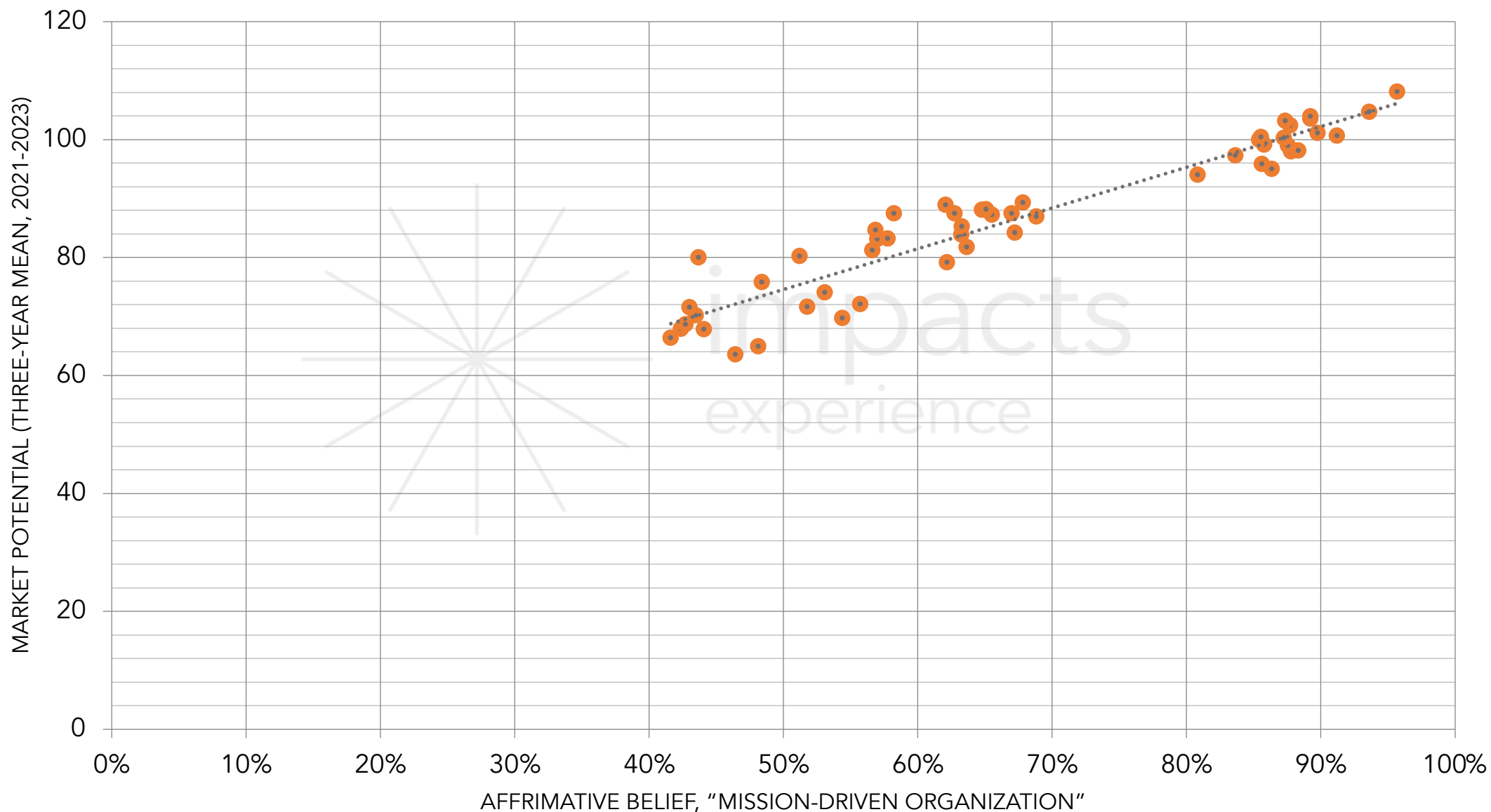
Let's bring it home:

Intentions to visit museums are down this year, and membership renewals and acquisitions face challenges.

But there's **good news** for our potential outlook if we can weather the storm.

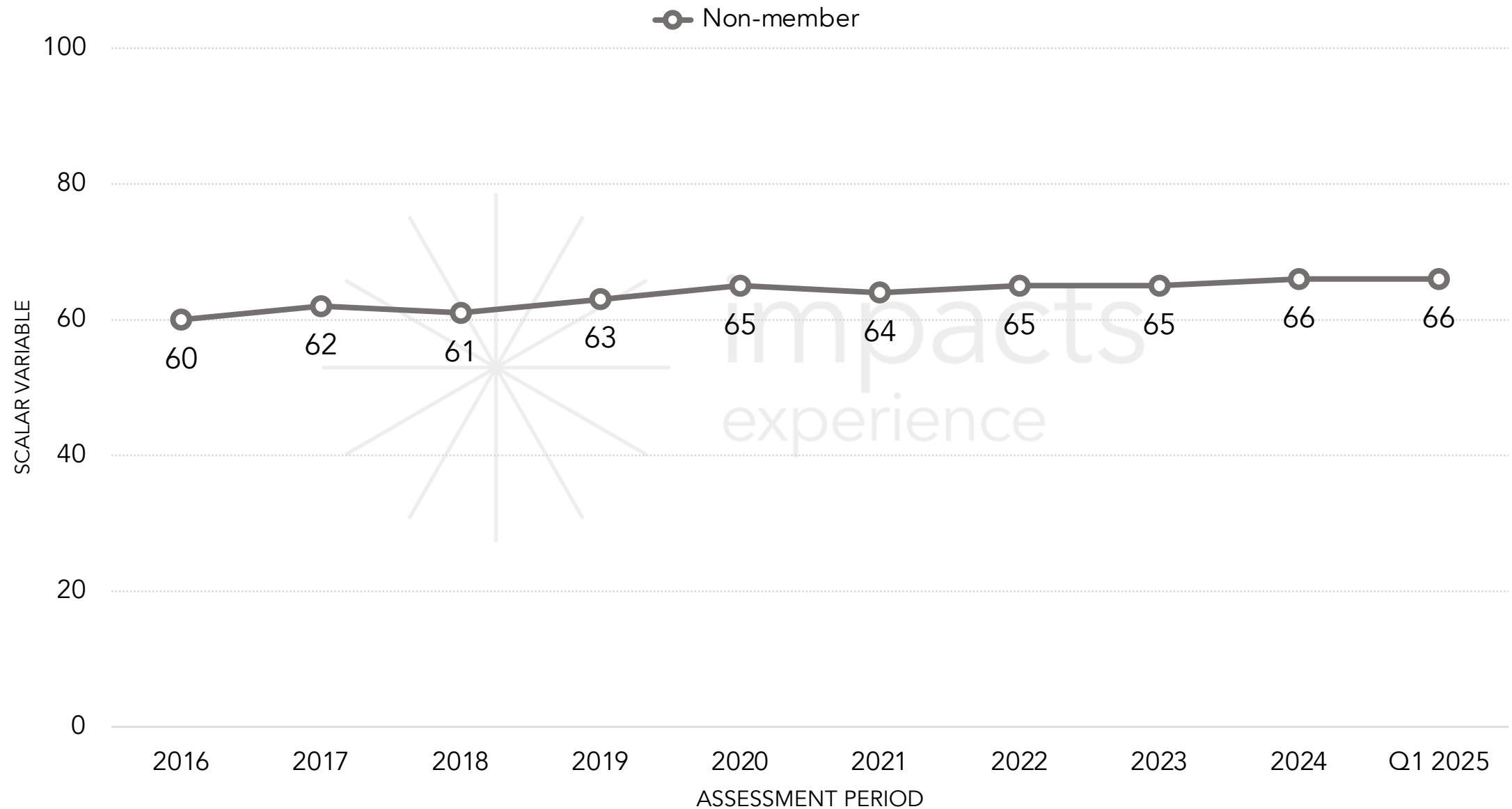
Bivariate relationship analysis

"Mission-driven organization" belief relative to realized market potential
US exhibit-based organization, Three-year analysis (2021-2023)



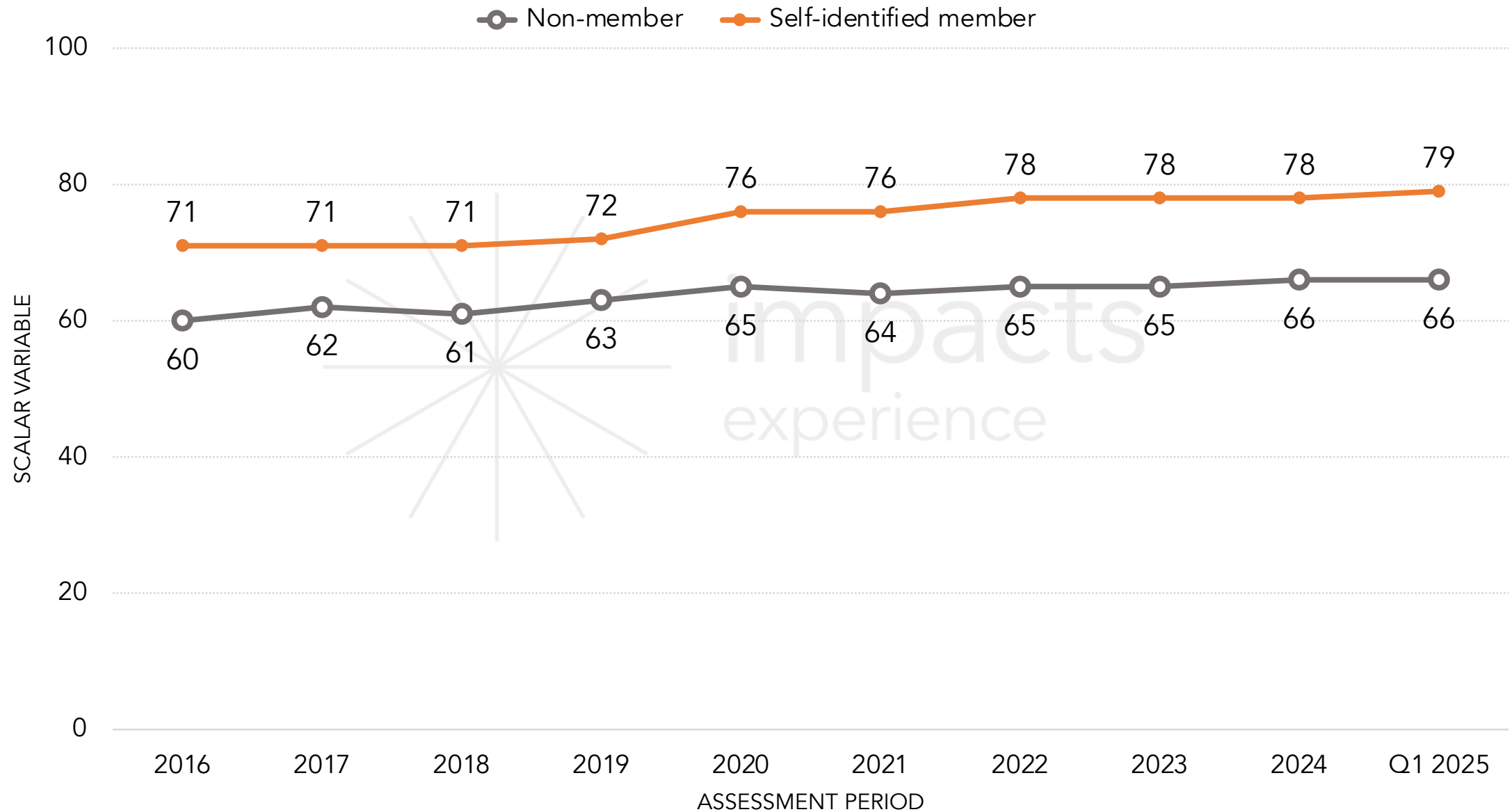
Public perception as mission-driven organization

US exhibit-based organization trend analysis



Public perception as mission-driven organization

US exhibit-based organization trend analysis





Members are increasingly
champions for their
museums' missions.

They know **why** we are here.

In a time of division,
museums are **trusted,**
credible, and looked to for
recommend behaviors to
elevate our communities.





A friendly reminder: Your work is especially important right now because YOU champion the people who champion your museum.



A friendly reminder:
YOU are leading these
positive perceptions.



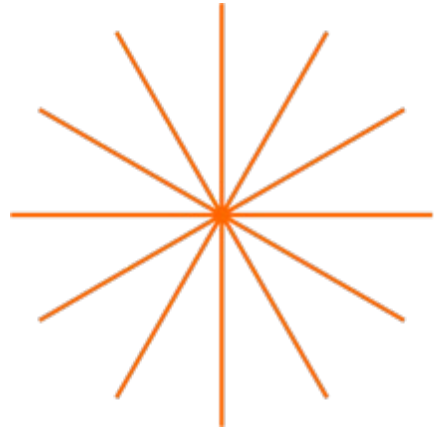
Keep **going.**



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For all inquiries:

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