

Your Voice Counts IV

**Final Report
April 2009**

**Prepared for:
Association of Children's Museums**

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F. ACM Reciprocal Membership Program

Participation

Nearly two-thirds (63.4%) of the respondents participate in the ACM Reciprocal Membership Program. Participation levels are particularly strong among the larger museums, the long-term members and the Leadership, with as many as 88.6% indicating participation (see Exhibit 33).

NOTE: All remaining analyses in this section are based upon the 111 respondents who participate in the Reciprocal Program. Due to the smaller sample size, some segments must be condensed or eliminated in breakouts, as noted below.

Exhibit 33: ACM Reciprocal Membership Program Participation

	% participating		Number of responses	Notes:
	Overall	63.4%	111	
Budget (operating income)	< \$250,000	21.2%	7	These categories are combined for the analysis
	\$250,000–\$499,999	70.8%	17	
	\$500,000–\$999,999	65.5%	19	
	\$1–\$2.9 million	72.5%	29	
	\$3–\$4.9 million	87.5%	21	
	\$5 million+	72.0%	18	
Museum age (date of opening)	Before 1990	77.9%	60	Not included in the analysis
	1990–1999	69.0%	29	
	2000–2008	58.8%	20	
	Not yet open	0.0%	0	
Membership length	Just Joined	20.0%	3	Not included in the membership length breakout.
	Early Cycle	42.9%	15	
	Mid Cycle	77.3%	34	
	Mature Cycle	88.6%	31	
Job title	CEO	67.0%	59	
	Staff	59.8%	52	
Leadership status	Leadership	80.6%	29	
	Rank and File	59.0%	82	

Distance Exclusion

The respondents were provided with the following information, followed by a series of questions:

Proposed Policy Change: Distance Exclusion

Museums located within either a 60 or 90 mile radius of each other are excluded from offering benefits to members from other museums within this radius that are part of the Reciprocal Program. Museums may create their own local reciprocal free admission programs with area museums. However, ACM will not dictate the terms, administer the local programs or require museums to participate in local reciprocal programs.

There is only modest support for a distance exclusion policy — as summarized in Exhibit 34, a majority of respondents (61.3%) stated they wanted to leave the program as-is, without a distance exclusion. Just over one-quarter (27.9%) want a distance exclusion policy implemented, with the remaining 10.8% unsure.

Significant support for implementing a distance exclusion policy is limited to the larger museums, with 50% supporting the policy, and 44.4% in opposition. A majority, or near majority of respondents in every other segment are opposed to a distance exclusion, and support leaving the program as-is. The greatest support for maintaining the status quo is from the smaller museums, with 87.5% requesting the program be left as-is.

Distance Exclusion Policy Reaction

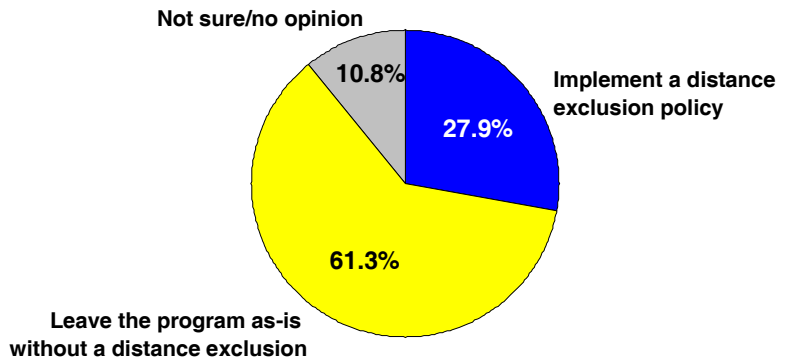


Exhibit 34

Responses across segments are provided in Exhibit 35 on the following page.

Exhibit 35: Distance Exclusion Policy Support by Segment

		Implement a distance exclusion policy	Leave the program as-is without a distance exclusion	Not sure/no opinion
Overall		27.9%	61.3%	10.8%
Budget (operating income)	< \$500,000	4.2%	87.5%	8.3%
	\$500,000–\$999,999	26.3%	47.4%	26.3%
	\$1–\$2.9 million	31.0%	58.6%	10.3%
	\$3–\$4.9 million	33.3%	61.9%	4.8%
	\$5 million+	50.0%	44.4%	5.6%
Museum age (date of opening)	Before 1990	30.0%	61.7%	8.3%
	1990–1999	37.9%	51.7%	10.3%
	2000–2008	10.0%	70.0%	20.0%
Membership length	Early Cycle	20.0%	60.0%	20.0%
	Mid Cycle	32.4%	55.9%	11.8%
	Mature Cycle	32.3%	54.8%	12.9%
Job title	CEO	30.5%	61.0%	8.5%
	Staff	25.0%	61.5%	13.5%
Leadership status	Leadership	37.9%	58.6%	3.4%
	Rank and File	24.4%	62.2%	13.4%

Regardless of their support for a distance exclusion policy, the respondents were asked to indicate what they felt would be an appropriate distance, should ACM implement such a policy. No consensus emerges — although a 60 mile distance is most often selected, it is cited by only 31.5%. Just under one-quarter support a 90 mile distance, and 15.3% support another distance (median of 30 miles). Nearly one-third are unsure (see Exhibit 36).

Appropriate Distance for the Policy
If ACM were to implement a distance exclusion policy, what do you think is an appropriate distance?

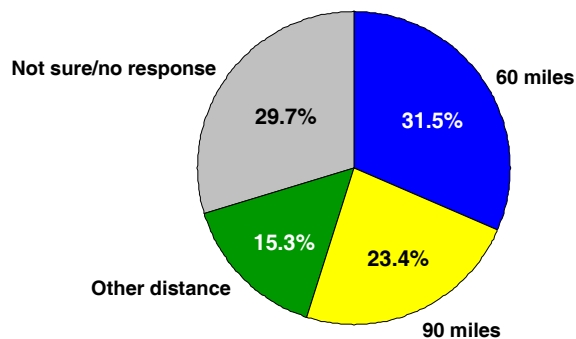


Exhibit 36

Segmenting responses again shows no consensus of opinion, with none of the options garnering a majority-level response in any segment. Opinion is especially divided for those who support a distance exclusion policy — 41.9% support a 60 mile distance and 41.9% support a 90 mile distance (see Exhibit 37).

Exhibit 37: Appropriate Distance for the Policy by Segment

		Exclude museums within 60 miles	Exclude museums within 90 miles	Other distance (*)	Not sure/no opinion
Overall		31.5%	23.4%	15.3%	29.7%
Budget (operating income)	< \$500,000	25.0%	12.5%	33.3%	29.2%
	\$500,000–\$999,999	42.1%	15.8%	5.3%	36.8%
	\$1–\$2.9 million	24.1%	37.9%	10.3%	27.6%
	\$3–\$4.9 million	47.6%	14.3%	4.8%	33.3%
	\$5 million+	22.2%	33.3%	22.2%	22.2%
Museum age (date of opening)	Before 1990	30.0%	26.7%	8.3%	35.0%
	1990–1999	41.4%	20.7%	13.8%	24.1%
	2000–2008	25.0%	20.0%	35.0%	20.0%
Membership length	Early Cycle	20.0%	26.7%	33.3%	20.0%
	Mid Cycle	47.1%	14.7%	17.6%	20.6%
	Mature Cycle	16.1%	35.5%	16.1%	32.3%
Job title	CEO	30.5%	22.0%	20.3%	27.1%
	Staff	32.7%	25.0%	9.6%	32.7%
Leadership status	Leadership	31.0%	20.7%	24.1%	24.1%
	Rank and File	31.7%	24.4%	12.2%	31.7%
Support for a distance exclusion policy	Yes	41.9%	41.9%	9.7%	6.5%
	No	25.0%	16.2%	20.6%	38.2%
	Not sure/no opinion	41.7%	16.7%	0.0%	41.7%

* = responses range from 0 to 300 miles. The average is 49 miles; the median is 30 miles.

A total of 41 individuals provided comments regarding the proposed policy change. While some favor the change, many of the comments outline why the respondent opposes such a move. A representative sample of comments is provided below, with the full set available in Appendix B.

For our museum, the distance exclusion policy doesn't matter much, but I could see how for museums out East, it might be much more meaningful.

I think this is one of our biggest marketing tools, I would hate to see it change, as would my members. I think we need to focus on getting more of our ACM members into the program, and maybe make it a host site expectation.

If Reciprocal didn't include museums within driving distance for our members, they would be unlikely to upgrade to the reciprocal category - we wouldn't be offering anything of value to them. We strongly oppose this idea.

If there is a distance exclusion policy, it should line up with ASTC.

Implementing this position would substantially hurt our museum and may even close it down.

Six months is not long enough notice to change our membership rates and benefits. Changing the distance exclusion is a bad idea. We are trying to get more and more people in our audience base. Our competition is NOT each other.

This is long overdue. I also think the minimum price for a reciprocal membership should be raised from \$100 to \$150.

We would probably not use the 90 mile policy if it were implemented. But keeping with the ASTC program seems easier for members to understand.

Very few such memberships are sold by our museum. Not an issue for us.

I would strongly oppose the distance policy. It should not matter about distance. It is the benefit of being able to frequent all the museums that counts.

We would not be a member of the reciprocal membership if a distance limitation were put on it! It is our number one membership sales perk!

Reciprocal Program Pricing

The present \$100 price point for selling Reciprocal Program membership is considered to be the best representation of membership value according to 60.4% of the respondents. About one-third disagree, and suggest price points ranging from \$50 to \$200 (median of \$125). The balance of the respondents are unsure of the best price point for membership (see Exhibit 38 on the following page).

Segmenting responses shows majority, or near majority level agreement across all segments that \$100 is the best representation of membership value. The greatest support is seen among the smallest museums, with 70.8% supportive of the \$100 price point. The weakest support is among the largest museums and the Leadership, with fewer than one-half supporting the \$100 price point. Those who disagree mainly suggest an increase to \$125. The peak median increase is seen among the Mature Cycle members, who suggest \$150 (see Exhibit 39).

Membership Price Point

Currently ACM requires all museums maintain a minimum \$100 price point for selling Reciprocal Program memberships. Is this still the best representation of the value of this type of membership?

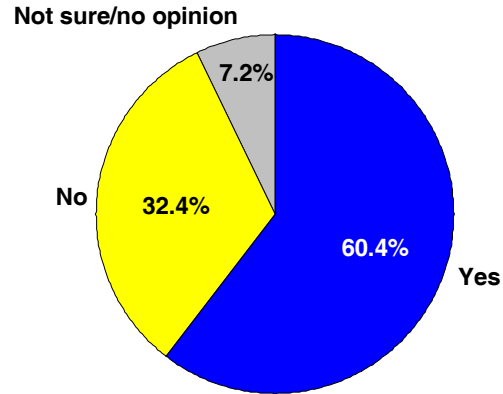


Exhibit 38

Exhibit 39: Membership Price Point by Segment

		\$100 is best representation of value	Another amount	Median amount (for those specifying another amount)	Not sure/no opinion
	Overall	60.4%	32.4%	\$125	7.2%
Budget (operating income)	< \$500,000	70.8%	29.2%	\$125	0.0%
	\$500,000–\$999,999	52.6%	26.3%	\$125	21.1%
	\$1–\$2.9 million	62.1%	31.0%	\$125	6.9%
	\$3–\$4.9 million	66.7%	33.3%	\$125	0.0%
	\$5 million+	44.3%	44.4%	\$125	11.1%
Museum age (date of opening)	Before 1990	58.3%	28.3%	\$125	13.3%
	1990–1999	58.6%	41.4%	\$125	0.0%
	2000–2008	65.0%	35.0%	\$125	0.0%
Membership length	Early Cycle	73.3%	26.7%	\$122	0.0%
	Mid Cycle	52.9%	38.2%	\$125	8.8%
	Mature Cycle	54.8%	29.0%	\$150	16.1%
Job title	CEO	57.6%	35.6%	\$125	6.8%
	Staff	63.5%	28.8%	\$125	7.7%
Leadership status	Leadership	48.3%	41.4%	\$125	10.3%
	Rank and File	64.6%	29.3%	\$125	6.1%

Program Coverage

A slight majority of respondents want the Reciprocal Program to cover a specified number of people, rather than be open-ended⁴ as presently structured. However, there is no consensus as to the number of individuals. Coverage for four admissions is the most popular response, cited by 27.9%, but there is also notable support for covering six admissions.

Program Coverage

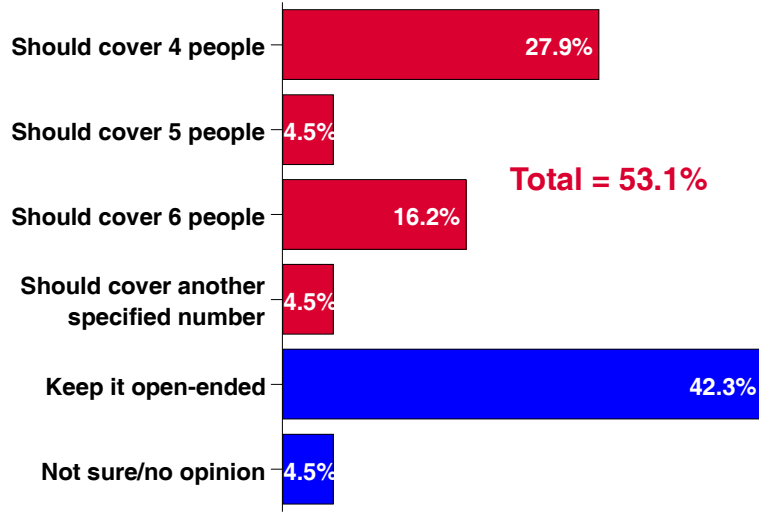


Exhibit 40

More importantly, a large number of respondents (42.3%) want to keep the

program as-is, with the number of admissions left open-ended. Thus, while there is slightly more support for coverage limits, no clear consensus of opinion emerges (see Exhibit 40).

The lack of significant consensus extends across most segments. While the total number requesting coverage limits nearly always exceeds the number requesting that the program remain open-ended, the difference is often slight. There is also no clear consensus as to the number of individuals who should be covered except for the largest museums, with 50% indicating coverage should be limited to four admissions per membership (see Exhibit 41 on the following page).

⁴ The Program leaves the number to be admitted open-ended, but suggests four admissions per membership.

Exhibit 41: Program Coverage by Segment

		Cover 4 people	Cover 5 people	Cover 6 people	Cover another number	Total requesting coverage limits	Keep it open-ended	Not sure/no opinion
Overall		27.9%	4.5%	16.2%	4.5%	53.1%	42.3%	4.5%
Budget (operating income)	< \$500,000	25.0%	4.2%	20.8%	4.2%	54.2%	45.8%	0.0%
	\$500,000–\$999,999	21.1%	10.5%	10.5%	10.5%	52.6%	47.4%	0.0%
	\$1–\$2.9 million	20.7%	3.4%	10.3%	6.9%	41.4%	44.8%	13.8%
	\$3–\$4.9 million	28.6%	4.8%	28.6%	0.0%	61.9%	38.1%	0.0%
	\$5 million+	50.0%	0.0%	11.1%	0.0%	61.1%	33.3%	5.6%
Museum age (date of opening)	Before 1990	28.3%	1.7%	11.7%	6.7%	48.3%	45.0%	6.7%
	1990–1999	24.1%	3.4%	27.6%	3.4%	58.6%	37.9%	3.4%
	2000–2008	30.0%	15.0%	15.0%	0.0%	60.0%	40.0%	0.0%
Membership length	Early Cycle	33.3%	13.3%	6.7%	0.0%	53.3%	46.7%	0.0%
	Mid Cycle	32.4%	0.0%	29.4%	2.9%	64.7%	26.5%	8.8%
	Mature Cycle	25.8%	3.2%	12.9%	6.5%	48.4%	45.2%	6.5%
Job title	CEO	30.5%	5.1%	13.6%	3.4%	52.5%	40.7%	6.8%
	Staff	25.0%	3.8%	19.2%	5.8%	53.8%	44.2%	1.9%
Leadership status	Leadership	41.4%	3.4%	6.9%	3.4%	55.2%	37.9%	6.9%
	Rank and File	23.2%	4.9%	19.5%	4.9%	52.4%	43.9%	3.7%

Membership Cards

There is majority-level support for adjusting the membership card requirement to list the name of at least one adult on the card, and have the option to request that visitors show a government-issued photo ID. As summarized in Exhibit 42, 64% of the respondents support this change; only 20.7% are opposed.

Name on Membership Card

Do you want ACM to require that member museums list the name of at least one adult on each membership card and have the option to request that visitors show a government-issued photo ID?

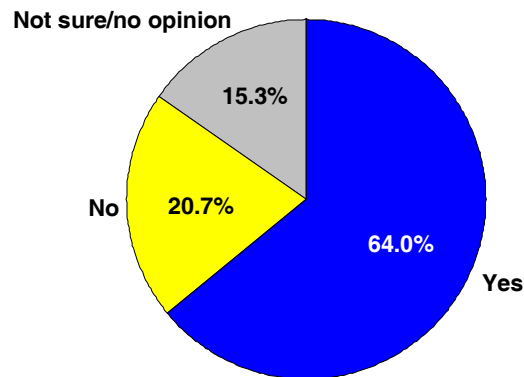


Exhibit 42

Support is fairly consistent, with the percentage agreeing with the proposed change usually over 50%. Peak support is seen among the mid-sized museums and respondents in the Staff category, with the percentage supporting the change at 71.2% or greater. Those least supportive of the change are the respondents from the largest museums and the Leadership — support is below 50% for both categories, and the number opposed is one-third or greater. Responses by segment are illustrated in Exhibit 43 below.

Exhibit 43: Name on Membership Card by Segment

Do you want ACM to require that member museums list the name of at least one adult on each membership card and have the option to request that visitors show a government-issued photo ID?

		Yes	No	Not sure/no opinion
Overall		64.0%	20.7%	15.3%
Budget (operating income)	< \$500,000	58.3%	16.7%	25.0%
	\$500,000–\$999,999	68.4%	26.3%	5.3%
	\$1–\$2.9 million	75.9%	13.8%	10.3%
	\$3–\$4.9 million	66.7%	19.0%	14.3%
	\$5 million+	44.4%	33.3%	22.2%
Museum age (date of opening)	Before 1990	61.7%	23.3%	15.0%
	1990–1999	69.0%	20.7%	10.3%
	2000–2008	65.0%	15.0%	20.0%
Membership length	Early Cycle	60.0%	20.0%	20.0%
	Mid Cycle	67.6%	17.6%	14.7%
	Mature Cycle	54.8%	29.0%	16.1%
Job title	CEO	57.6%	25.4%	16.9%
	Staff	71.2%	15.4%	13.5%
Leadership status	Leadership	48.3%	34.5%	17.2%
	Rank and File	69.5%	15.9%	14.6%

The respondents were also asked if they support having ACM require program participants to present only permanent membership cards to gain admission (e.g., deny temporary membership cards). A strong majority (71.2%) are opposed to this proposal. As summarized in Exhibit 44, only 18% support denying temporary membership cards, with the remaining 10.8% uncertain.

Permanent Membership Card Requirement

Do you want ACM to require program participants to present only permanent membership cards to gain admission? (deny temporary membership cards)

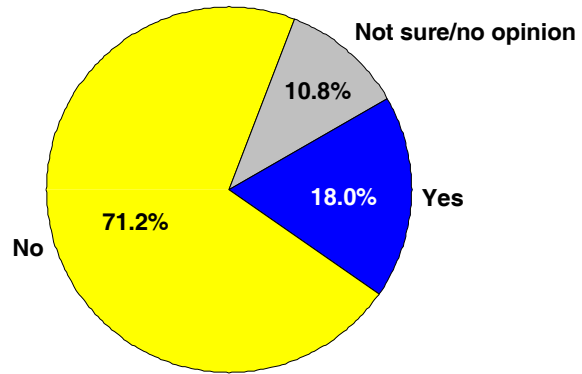


Exhibit 44

Opposition to denying temporary membership cards remains high across nearly all segments, and is especially strong among the largest museums (88.9% opposed). The percentage in favor of this proposal peaks among museums in the 1990 to 1999 age segment, rising to 37.9%. Still, even among these respondents, the percentage opposed remains above a majority-level (see Exhibit 45).

Exhibit 45: Permanent Membership Card Requirement by Segment

Do you want ACM to require program participants to present only permanent membership cards to gain admission? (deny temporary membership cards)

	Yes	No	Not sure/no opinion	
Overall	18.0%	71.2%	10.8%	
Budget (operating income)	< \$500,000	25.0%	66.7%	8.3%
	\$500,000–\$999,999	31.6%	47.4%	21.1%
	\$1–\$2.9 million	13.8%	75.9%	10.3%
	\$3–\$4.9 million	14.3%	76.2%	9.5%
	\$5 million+	5.6%	88.9%	5.6%
Museum age (date of opening)	Before 1990	8.3%	78.3%	13.3%
	1990–1999	37.9%	58.6%	3.4%
	2000–2008	20.0%	65.0%	15.0%
Membership length	Early Cycle	20.0%	73.3%	6.7%
	Mid Cycle	32.4%	58.8%	8.8%
	Mature Cycle	9.7%	74.2%	16.1%

Table continued on following page

Exhibit 45: Permanent Membership Card Requirement by Segment

Do you want ACM to require program participants to present only permanent membership cards to gain admission? (deny temporary membership cards)

		Yes	No	Not sure/no opinion
Overall		18.0%	71.2%	10.8%
Job title	CEO	23.7%	62.7%	13.6%
	Staff	11.5%	80.8%	7.7%
Leadership status	Leadership	13.8%	79.3%	6.9%
	Rank and File	19.5%	68.3%	12.2%

There is only modest support for the proposal that ACM eliminate Reciprocal Stickers for membership cards, and require museums to print the Reciprocal logo directly on the card. As summarized in Exhibit 46, only 28.8% are in favor of this change; 50.5% oppose it.

Although support remains modest across most categories, there is a strong spike in support among the largest museums — 55.6% of these respondents favor eliminating the stickers. In sharp contrast, only 16.7% of the smallest museums concur. Responses are more uniform across most other segments, with the largest share of respondents (often a majority) in opposition to the proposed change. Responses by segment are illustrated in Exhibit 47 on the following page.

Elimination of Stickers

ACM is considering the elimination of Reciprocal Stickers for membership cards. Instead museums would be required to print the Reciprocal logo directly onto the cards that carry reciprocal benefits. Do you think that ACM should eliminate the stickers?

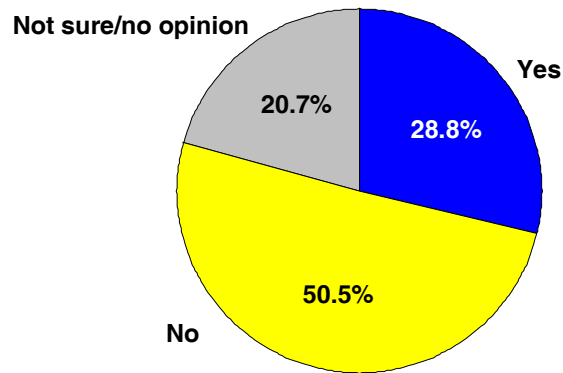


Exhibit 46

Exhibit 47: Elimination of Stickers by Segment

ACM is considering the elimination of Reciprocal Stickers for membership cards. Instead museums would be required to print the Reciprocal logo directly onto the cards that carry reciprocal benefits. Do you think that ACM should eliminate the stickers?

		Yes	No	Not sure/no opinion
Overall		28.8%	50.5%	20.7%
Budget (operating income)	< \$500,000	16.7%	62.5%	20.8%
	\$500,000–\$999,999	26.3%	68.3%	5.3%
	\$1–\$2.9 million	24.1%	55.2%	20.7%
	\$3–\$4.9 million	28.6%	33.3%	38.1%
	\$5 million+	55.6%	27.8%	16.7%
Museum age (date of opening)	Before 1990	31.7%	43.3%	25.0%
	1990–1999	24.1%	65.5%	10.3%
	2000–2008	30.0%	50.0%	20.0%
Membership length	Early Cycle	20.0%	53.3%	26.7%
	Mid Cycle	32.4%	58.8%	8.8%
	Mature Cycle	35.5%	38.7%	25.8%
Job title	CEO	28.8%	55.9%	15.3%
	Staff	28.8%	44.2%	26.9%
Leadership status	Leadership	37.9%	44.8%	17.2%
	Rank and File	25.6%	52.4%	22.0%

Residency Requirement

Nearly seven of every ten respondents opposes having ACM require that those who hold a Reciprocal Membership reside in the same state or province as the museum of which they are a member. As summarized in Exhibit 48, only 18.9% support such a move, with the balance unsure.

Residency Requirement

Do you want ACM to require that those who hold a Reciprocal Membership reside in the same state or province as the museum of which they are a member?

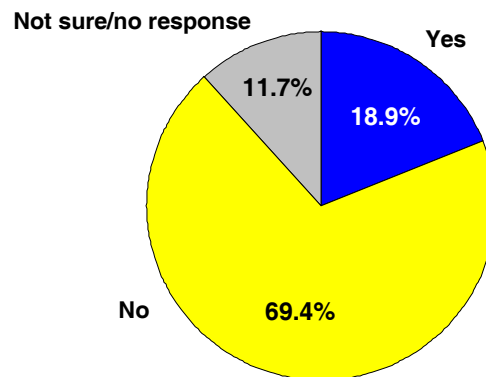


Exhibit 48

Responses are consistent across segments, with a majority in every segment opposing the proposed residency requirement. Those from the largest museums show the least support for this proposal — 83.3% are opposed to a residency requirement, and only 5.6% are in favor (see Exhibit 49).

Exhibit 49: Residency Requirement by Segment

		Yes	No	Not sure/no opinion
Overall		18.9%	69.4%	11.7%
Budget (operating income)	< \$500,000	25.0%	66.7%	8.3%
	\$500,000–\$999,999	21.1%	68.4%	10.5%
	\$1–\$2.9 million	24.1%	58.6%	17.2%
	\$3–\$4.9 million	14.3%	76.2%	9.5%
	\$5 million+	5.6%	83.3%	11.1%
Museum age (date of opening)	Before 1990	18.3%	68.3%	13.3%
	1990–1999	20.7%	69.0%	10.3%
	2000–2008	20.0%	70.0%	10.0%
Membership length	Early Cycle	26.7%	60.0%	13.3%
	Mid Cycle	14.7%	70.6%	14.7%
	Mature Cycle	12.9%	74.2%	12.9%
Job title	CEO	20.3%	69.5%	10.2%
	Staff	17.3%	69.2%	13.5%
Leadership status	Leadership	17.2%	72.4%	10.3%
	Rank and File	19.5%	68.3%	12.2%

The survey section on the Reciprocal Program closed by inviting respondents to share any additional comments they have regarding the Program. A total of 38 complied, and their comments often describe why they selected the choices they did regarding the proposed changes. This information is essential to understand the members' impressions and concerns regarding the Reciprocal Program, and should be reviewed in detail by ACM staff and leadership. Full-text comments are provided in Appendix B.