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Report

THE MEMBERSHIP JOURNEY:

Understanding and boosting membership today

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EXECUTIVE SUMMARY

- Membership is an important part of the working of a healthy democratic system. Yet in a world where individual and sporadic engagement is becoming the norm, membership of political organisations is increasingly unusual.
- Membership organisations now regularly confront challenges in recruiting, activating and retaining members.
- Membership can be usefully understood as a journey, not a series of disconnected stages. This journey is underpinned by three factors:

1) MOTIVATION

2) PROCESS

3) TRIGGER

- By understanding these factors, organisations can better recruit, activate and retain members.
- Organisations wishing to address membership challenges can take the following actions:
 - * Understanding motivation: collect and communicate members' reasons for joining; feedback members on the outcomes of their campaigning activity; target specific events around specific motivations; thank members for engaging and volunteering time
 - * Understanding process: conduct mystery shopper exercises to see how easy it is to join and get involved with your organisation; install a direct debit system by default; share best practice in recruitment, retention and activation; offer lifetime membership; highlight motivations for joining and remaining in the party online
 - * Understanding triggers: identify existing events, activities and catalysts for joining or taking action in an organisation, piggyback on external events and campaigns that might drive people to your organisation; orchestrate events that might cultivate engagement and boost membership; mainstream membership recruitment and engagement as a part of ongoing activities; ensure that triggers are the only cause of membership loss



THE CHALLENGE OF MEMBERSHIP

Membership has historically been a key part of the democratic system. Through membership, political parties, campaigning organisations and professional bodies have cultivated links to citizens, and provided avenues for people to get involved. Yet membership levels are far from stable. In a world in which individual and sporadic engagement is increasingly the norm, ongoing membership and activism is becoming unusual. Evidence collected by academics working across a number of European countries has shown that membership of political parties has approximately halved since 1970 (Figure 1). Although in the UK this was tempered by a number of significant, and surprising, membership surges throughout the 2010s (Figure 2), the overall picture remains one of decline.¹ For membership organisations, this poses a particular challenge: members are not only an important resource, they are also a vital source of legitimacy. In a climate where members are increasingly hard to recruit, mobilise and retain, membership organisations face a particular challenge.

In this report we diagnose and respond to the challenge of membership, offering practical suggestions for membership organisations by confronting three questions:

- **How can members be recruited?**
- **How can members be encouraged to engage in different activities?**
- **How can members be retained?**

To answer these questions, we held a workshop in London in January 2018. Participants included the Green Party, the Liberal Democrats, and political campaigning organisations including More United, Amnesty International and the Campaign to Protect Rural England. We also conducted interviews and, specifically working in the party context, held focus groups with party members. The report also draws on findings from a wider project that gathered data on public attitudes towards parties and political engagement.

¹Political parties in the UK are under no obligation to release membership figures. The Conservatives chose not to release this data from 2014 to 2017 so have been removed from figure 2. Their current membership as per Audickas, Dempsey and Keen (2018) was reported as 124,000.



Figure 1: Party membership change per country (1970-2010)

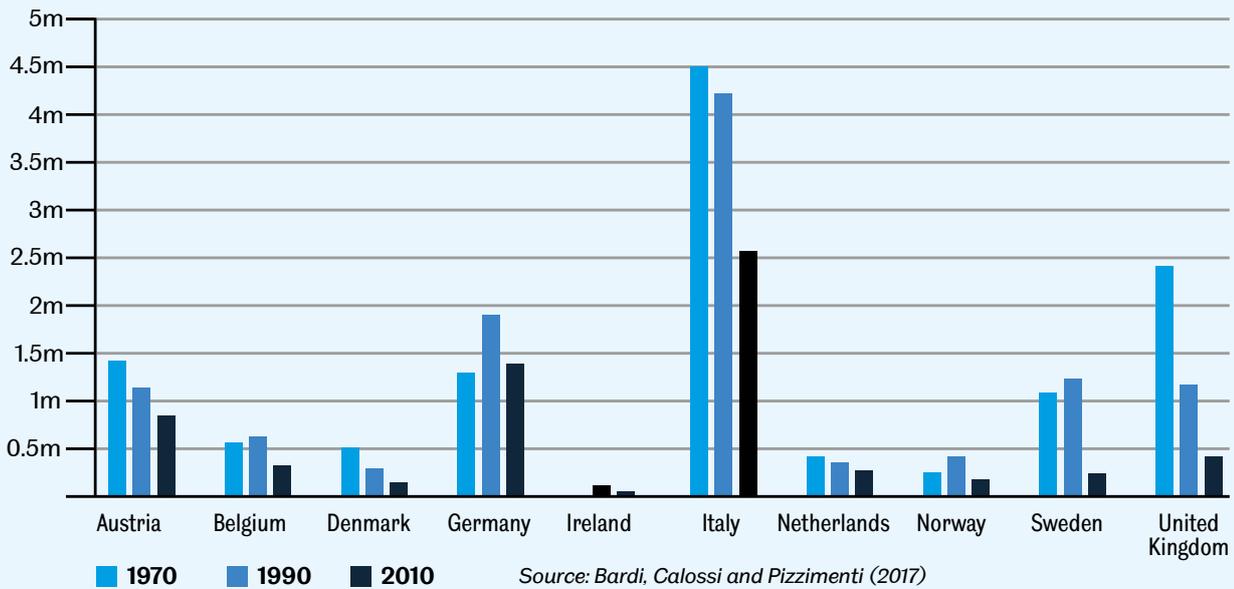
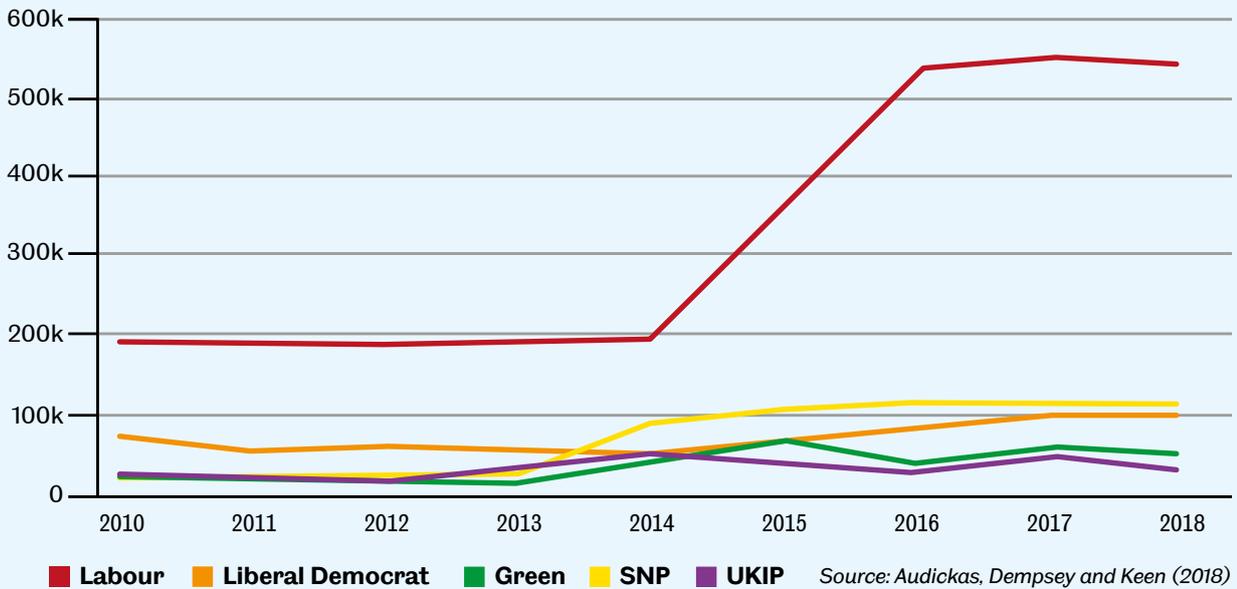


Figure 2: Political party membership in the UK (2010-2018)



THE MEMBERSHIP JOURNEY

Membership is not static. Often when we talk about membership, we focus on specific aspects, asking about recruiting, engaging or retaining members, but this approach takes an overly segmented view of how membership works. Rather than being defined by distinct stages, we argue that membership is a journey that is embarked upon, sustained and can end in accordance with the influence of three factors:

- 1) **MOTIVATION**
- 2) **PROCESS**
- 3) **TRIGGER**

When seeking to answer the questions of why people join, why people become active and why people stay members, we therefore need to think about how motivations, processes and triggers influence an individual's membership journey. As demonstrated below, each of these aspects contribute to and inform the decision to become or remain a member, or to make an active contribution to a membership organisation.



By understanding these factors, we argue that new strategies for member recruitment, engagement and retention can be formed. Thinking about membership as a process that needs to be facilitated and nurtured, organisations can ask themselves important questions that will help to build, engage and retain their membership - addressing the problems of high turnover and disengagement that are often hidden by overall membership figures.

To demonstrate how, we reflect on each aspect of membership below. We also outline key questions membership organisations need to ask, and present case studies, stories and best practice examples to inspire future reforms.

JOINING A POLITICAL ORGANISATION

Existing work on membership has offered a range of explanations for why people join organisations, and has catalogued the various capacities that members provide. As well as legitimising activities, members provide resource and finance as well as a reservoir of popular support. This existing work categorises these five distinct motivations as:

- **Expressive:** an individual might join a political organisation out of an attachment to their principles or, in the case of a political party, a belief in its leadership
- **Collective:** an individual might join because of a specific issue, or in opposition to another organisation or economic group
- **Altruism:** an individual might join out of a sense of civic good, to support the democratic process or promote the interests of a nation
- **Social:** an individual might join due to the influence of family, friends, colleagues or simply to engage with like-minded individuals
- **Selective:** an individual might join to enhance their career

What this account and others like it do not capture, are the precise reasons that a person joins an organisation. To explain this process, and to show the relevance of the three factors we argue are key, it is useful to look at some membership stories

STORY 1:

“Although I voted Green for years, for me, the deciding factor was on the zero hour contracts and I know that sounds like a really obscure thing, and it may be for a lot of people...but I was watching a debate and it was a really mealy-mouthed person, it was during 2013, and the spokesperson for the Labour Party on Newsnight just wouldn’t condemn zero hour contracts...Then I looked at everything else [from the Greens] and I said, “I agree with all of that.” It’d be really churlish not to join them really...”



During our research we asked a number of individuals about their journey to becoming a member of a political party or political organisation. Story 1 shows a clear expressive **motivation** to join a political party. However, it was not until a **trigger** occurred – in this case a story regarding zero-hours contracts – that this motivation was acted upon. However, a motivation and a trigger are not enough without **process**. As story 2 shows, a social motivation to join the (then) Liberal Party was not acted upon because, simply, it was too difficult to join the party. Failures in the **process** of joining stalled the membership journey.

STORY 2:

“I thought of joining the Liberal Democrats who were then the Liberal Party and oddly enough, I failed to be able to do that. I didn’t make a huge effort, I must admit, but there were several people at my place of work who I knew were Liberal Party members and I thought it would be quite easy to drop a word and say, “How do you join?” Anyway, I didn’t find any way of joining, this was of course pre-internet, although I must admit, I didn’t pursue it doggedly...”

To summarise, we argue that the decision to become a member is contingent on:

- Motivations: the **expressive, collective, altruistic, social or selective** incentives behind the membership journey
- Processes: the **effective mechanisms** that allow an individual to join an organisation, and
- Triggers: the personal, local, national or international **catalyst** that causes a person to complete the membership journey

The absence of any of these factors will prevent people from becoming members.

	Motivations	Processes	Triggers
Examples	Ideological affiliation	Face-to-face recruitment	National event
	Desire to work in politics	Online membership system	Reaching retirement age
	Wish to bring about change	Direct debit sign up	Local recruitment drive

WHAT SHOULD A PARTY SEEKING TO BOOST RECRUITMENT DO?

When considering membership recruitment, organisations should ask themselves three simple questions:

1. Why would an individual be **motivated** to join your organisation?
2. How easy is the **process** of joining your organisation?
3. What are the kinds of **triggers** that would spur an individual to join your organisation?

Why would an individual be motivated to join your organisation?

Parties and other non-partisan political organisations tend to understand motivations fairly well. Membership surveys (of existing and recently joined members) provide a rich source of data on why people decide to get involved. As well as understanding what individual members want to do (a key source of information for activation), this data can be used to spread understanding of why other people may want to engage (as in this Labour Party example – a screenshot from the Party website).



How easy is it for an individual to join your organisation?

Process is the easiest feature of this model to understand but remains the most difficult for organisations to perfect. Most organisations now have online systems for joining, making it easier for individuals to sign up. However, others rely on localised membership systems, or processes that are not as simple as they could be. The process of joining can therefore be enhanced by thinking about the effectiveness of the mechanism, and the design of that process. In terms of effectiveness, a recent article [see box 1] demonstrated that 'secret shopper' exercises can reveal significant flaws in the membership process.²

² See <https://capx.co/recruiting-new-tories-will-take-more-than-a-poultry-discount-card/>

BOX 1:

The middle-aged attempting to join can also find the Conservative Party a hostile environment. A “mystery shopping” exercise that was conducted showed that of those applying to join the Conservative Party over half got no reply, 10 per cent were told the Party was closed to new members, and some were told that an interview must first be passed.

Membership organisations should therefore test their structures regularly. In addition, membership organisations can also think about how they can design membership processes to boost recruitment. Story 3 outlines a successful feature that the Green Party trialled in which their website homepage instantly advertised membership.

Reviews of process effectiveness and design can therefore help to promote greater membership levels.

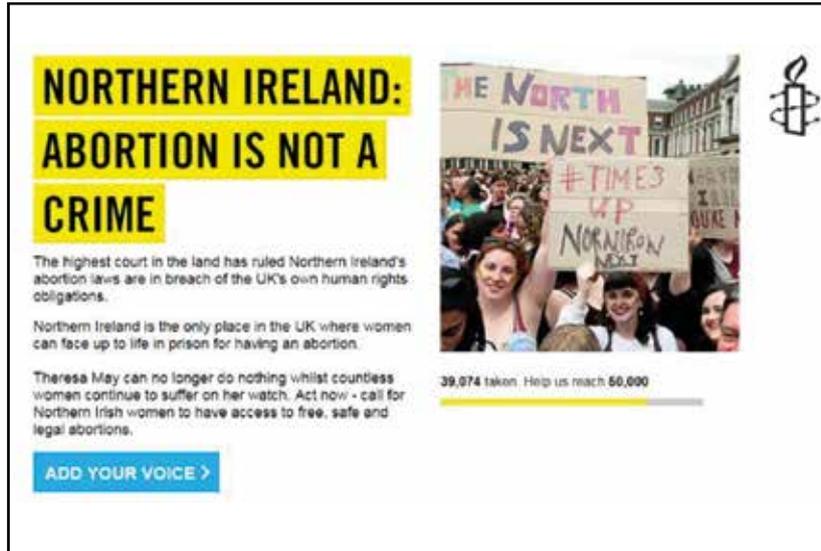
STORY 3:

“46% of people who say they joined...did it by the website. And this is exactly how I did it, no contact with the local party. So...until last Thursday, we’ve had a two-week experimentation with our home page being entirely about joining. So, people go on the home page, that’s where there’s a join and it’s all about join message. You know, easy links, a suggested figure, which is not a membership rate figure...that worked quite well, not only did we have more new members, but we also had them paying substantially higher average membership. Now, we’ve switched it to an elections home page. The new membership has gone right off...so, the question is: is it a membership tool? There’s a lot of evidence, actually, that it is a very successful, it’s good at doing that, there’s a lot of traffic to the site... it doesn’t cost much to join a political party does it, really, against other purchases? So, I think there’s a huge amount of impulse thing. And I think it’s capturing that impulse stuff...It’s not just events, but it’s actually in the first 30 seconds if you’ve got them.”

What are the kinds of triggers that would spur an individual to join your organisation?

Finally, membership organisations seeking to boost their numbers also need to think about triggers. Our research shows that national or international events are the most important trigger in the membership journey – but they are not the only one. A **trigger** can be anything from the personal (such as reaching retirement age), local (an induction event at a university), national (a general election) or international (a government’s decision to engage in a military campaign). For political parties the largest triggers over the past few years have been the 2015 and 2017 general elections and the 2016 referendum on membership of the European Union.

This suggests that organisations may be able to capitalise on external events to boost their membership. Gyms, for example, know that they will get a membership surge in the New Year and will be ready with advertising campaigns (using a trigger to ignite a motivation) and will ensure extra staff are ready to cope with demand (ensuring effective process mechanisms).



We suggest that there are three distinct ways membership organisations can think about triggers:

1. Piggybacking
2. Orchestrating
3. Mainstreaming

Piggybacking is much like the gym example above and simply refers to utilising either regular, or one-off events as an attempt to better manufacture a trigger. This might include, in a seaside community, having a presence at a local beach clean or a community event. The above example shows a recent Amnesty International campaign that does just this. Piggybacking on a topical story which is a natural fit for the organisation and its supporters.

Orchestrating involves designing an event with the aim of boosting membership (although this doesn't have to be the event's only aim). This might be something as small as a pub quiz organised and promoted through a wider supporter's mailing list, or as large as a day-long festival. However, orchestration needs to be planned carefully to ensure that events have the desired effect.

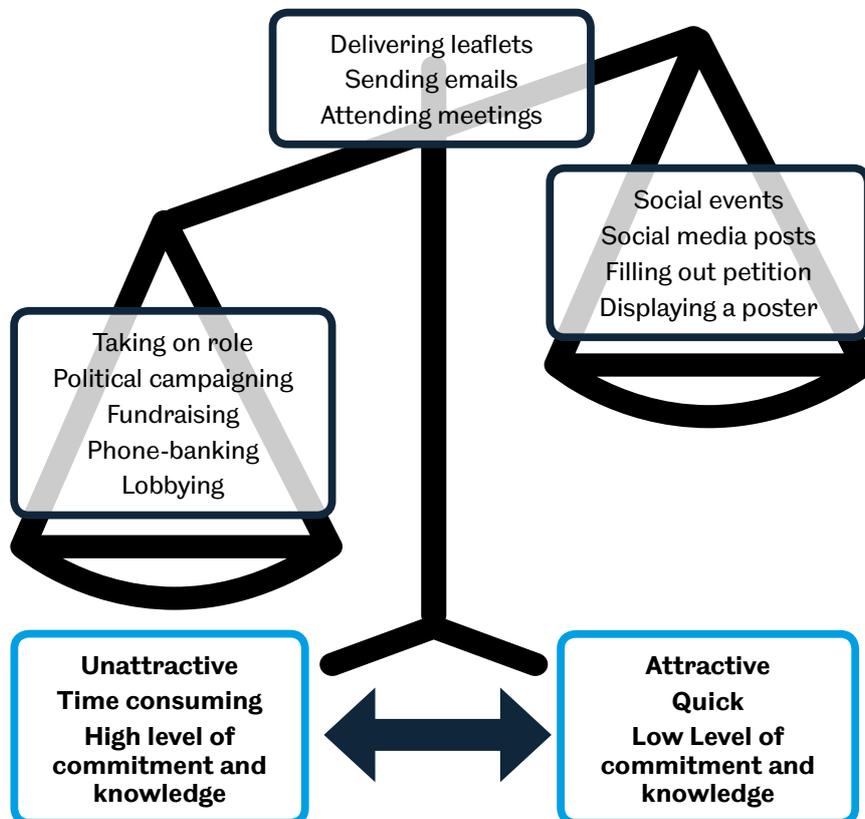
Mainstreaming is including a focus on membership as a part of your other activities. For political parties this would include actively encouraging membership on the doorstep and on campaign stalls. For non-partisan political organisations this would include having membership drives as a secondary focus on campaign days. Membership and campaigning should not be treated as separate. Rather, membership and campaigning should be considered as two parts of the same coin.

By reviewing all three aspects of becoming a member, political organisations should be able to boost their membership levels.

CREATING MORE ACTIVE MEMBERS

In a similar way, this model reveals why people decide to become active within organisations. There are any number of ways an individual or group may be – or want to be – activated within an organisation. Many members will likely wish to do little more than pay their membership fee, but others may be willing to take on further roles.

Acknowledging that all opportunities for activation are not equal, membership organisations need to recognise that some activities are attractive, quick, and require a low level of commitment or knowledge, whilst others are unattractive, time consuming and require a high level of commitment or knowledge. These differences in appeal, time, and commitment or knowledge can usefully be seen as scales upon which the various activities of membership organisations can be mapped.



This matters because people will be much more likely to engage in activities that are attractive, quick and require minimal levels of commitment such as attending socials, discussion groups, or engaging on social media, as opposed to those such as campaigning, standing for election or lobbying politicians which require more time, commitment and are less attractive. These differences can be usefully considered when asking the following questions about motivations, processes and triggers.

Specifically, we ask:

1. Why would or should members be **motivated** to get involved?
2. How easy is the **process** of getting involved?
3. What would **trigger** members to get involved?

STORY 4:

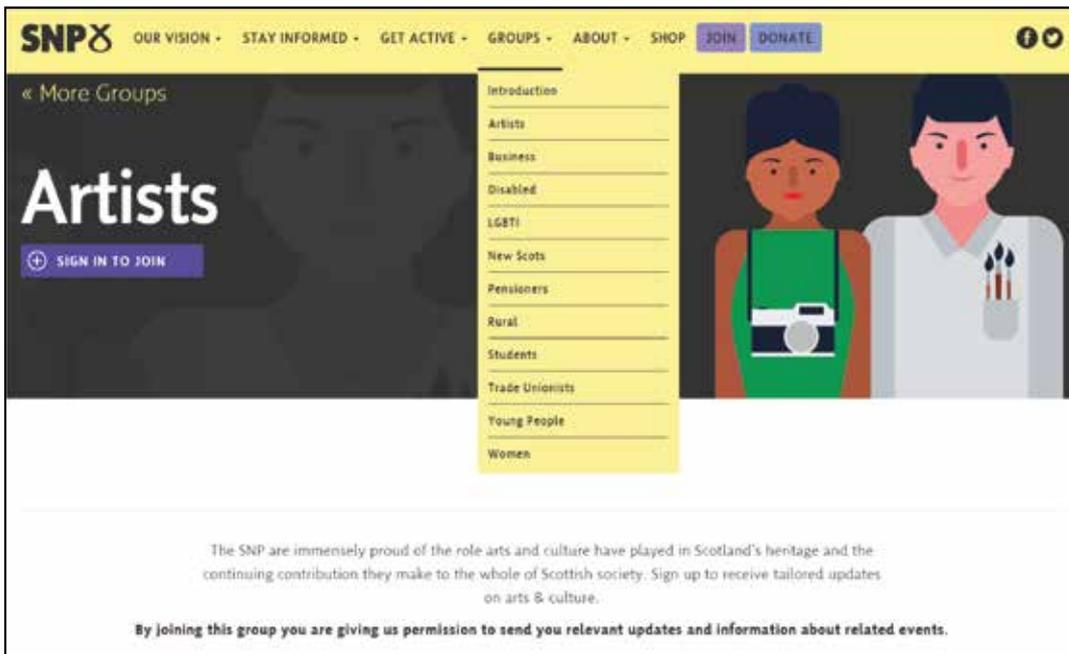
“Some people will respond to different carrots, like, I remember being a member of a political party when I was 18 and it was only social events, and most of the people there loved it, to them it was like a tribe, like this is who we are, we are members of the party and therefore we go to the pub and we drink and we talk about anything other than politics. And now I’m a member of another party, and it is completely the opposite, its meetings, meetings, policy, campaigning, election campaigning.”

Why would or should members get involved?

Many membership organisations possess data from internal surveys about why people get involved, but few possess the structures with which to engage people on their interests. We suggest that organisations need to identify how individuals want to get involved and then offer a spectrum of opportunities, ideally tailored to individuals’ desires.

This can be done using data from internal membership surveys that identifies people’s interests, or by providing members with other ways to find out about opportunities that interest them. For example, the Scottish National Party have a group section on their website where members and supporters can join groups that match their particular interests.

Organisations need to think about providing a range of different activities that address these interests, from those that are quick, attractive and require low levels of commitment, to those that require more sustained and intensive activism.



How easy is the process of getting involved?

Membership organisations often demonstrate good attempts to get people involved and provide training and capacity building opportunities. Most of the organisations we studied had strategies to get people involved when they became members. For example, in the Labour Party there are clear guidelines for how to engage new members set out in a single document: 'Engaging and Welcoming New Members' that is available to all local parties. This outlines strategies for activities such as 'turning your new members into campaigners' by having 'new member campaign sessions' or a 'new member campaign training event'. These kinds of guide provide clear processes and strategies that help to overcome any anxiety new activists may experience when they think about getting engaged.

It is important that processes aren't just created for new members. Long-standing members also need to be engaged and provided with opportunities to promote activism.

STORY 5:

"I joined during the General Election, and after the result I felt I had to do something. I wanted to volunteer but I was really nervous about getting in touch with my local party. I was worried that I didn't know enough and wouldn't be much help. I'm happy I did though. I got all the training I needed and they were so glad for the extra voice. I've enjoyed it so much I plan to get more involved in the future."

In practice, good process looks like:

- Offering briefings and buddying schemes to help people overcome concerns about activities such as campaigning
- Fewer emails and greater coordination of emails
- Targeted mailing lists
- Centrally produced guidelines and phone scripts

STORY 6:

"We've got hundreds of members but only tens of activists, we've got tons of people paying money, but only 20, 30, 40 activists and we do a lot of phone rounds, and I was doing one last night, and all of a sudden you get new people coming forward, which is great."

Organisations may also want to think about designing processes (pictured below and adapted from 'Engaging and Welcoming New Members'), to help people become involved.

New member joins organisation and is contacted

- Welcome phone call or email from organiser (local if possible)
- Receives information about membership organisation and engagement opportunities

New member says they would like to get involved

- Invite along to event
- Provide information about events and activities
- Explain processes and activities

New member says they would not like to get involved

- Let them know that they will receive regular updates and email
- Provide contact details for if they change their mind
- Ask them how they would like to be engaged

First active engagement

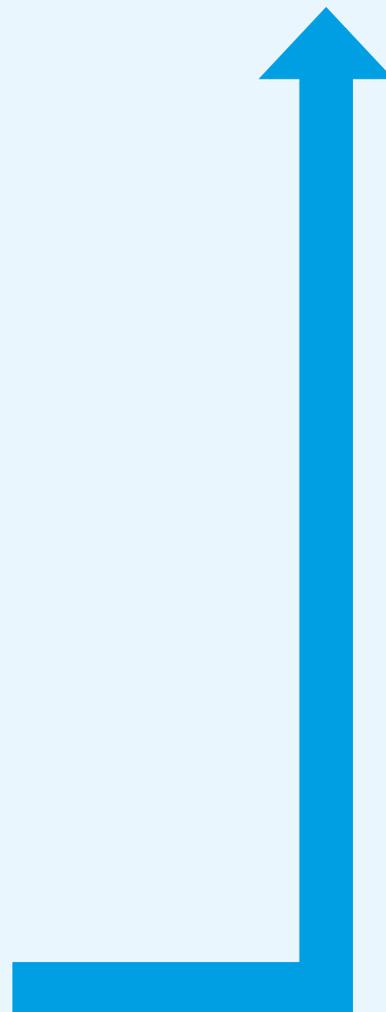
- Make sure new member is welcome and introduced
- Explain any relevant processes or context
- Introduce to likeminded members
- Provide opportunities for them to get involved

Immediate follow up

- Get in touch to thank them
- Ask for feedback
- Ask if they're interested in other events
- Ask if they have friends who they may want to invite along

Ongoing engagement

- Get in touch to have a chat
- Update on events
- Ask about interests
- Invite them to get involved in something coming up



What would trigger members to get involved?

There will also be a range of triggers that cause members to become engaged in organisations. Organisations can either respond to these triggers, or actively cultivate engagement. During our research we worked with a local party activist who outlined a model of best practice in this area. The activist had done a number of experiments and found that activation worked best – at the local level – if a party member telephoned new recruits welcoming them to the organisation within a week of joining.

We found that interpersonal relationships, nurtured over time helped to get people to engage, especially where they found like-minded people to get involved with. Membership organisations can therefore deploy the techniques of piggybacking, orchestrating and mainstreaming:

- **Piggybacking** by asking members to get involved in an activity that is not run by the membership organisation itself, but which shares political goals (for example, asking members to attend a local fun day)
- **Orchestrating** by putting on an activity that responds to members' motivations and desires. If there is a big spike in activity around, say, Brexit or the visit of Donald Trump. It might well be the case that this was an important trigger to a group of individuals joining the organisation. Why not design events that appeal to these individuals?
- **Mainstreaming** by combining activities such as asking members at a social event to fill out a postcard or letter as part of a wider campaign, or advertising other party events in meeting minutes or social media messaging.

STORY 7:

*"The Greens are good at this, we have tree planting sessions, socials, all sorts of things"/
"And the Labour Party used to be absolutely brilliant at it, so you know, all of those things"/ "Yeah, there was a social, drinking culture around as well as the business thing."*



RETAINING MEMBERSHIP

The membership journey is ultimately an ongoing process, and if organisations focus on recruitment and activation then they are also focusing on retention. In this sense, when organisations have effective process mechanisms in place and have understood the triggers and motivations driving membership and causing members to become active, retention (largely) becomes a self-fulfilling prophecy. Retention should not be considered separate from recruitment and activation. And yet, there are motivation and process aspects of the membership model that can be helpful in minimising the chance of people leaving. It is therefore useful for membership organisations to ask:

1. Why would you be **motivated** to remain a member?
2. How does the **process** of membership encourage retention?
3. What **triggers** people to leave organisations?

STORY 8:

"It didn't feel I've had any particular influence or say or that it even mattered what I thought...I didn't particularly like what I considered to be sort of finger-jabbing male approach in the local parties that I went along to. I mean, it was quite overwhelming at times. And I would go away from a meeting thinking I haven't got a chance to speak and it probably wouldn't matter anyway...that was dominant."

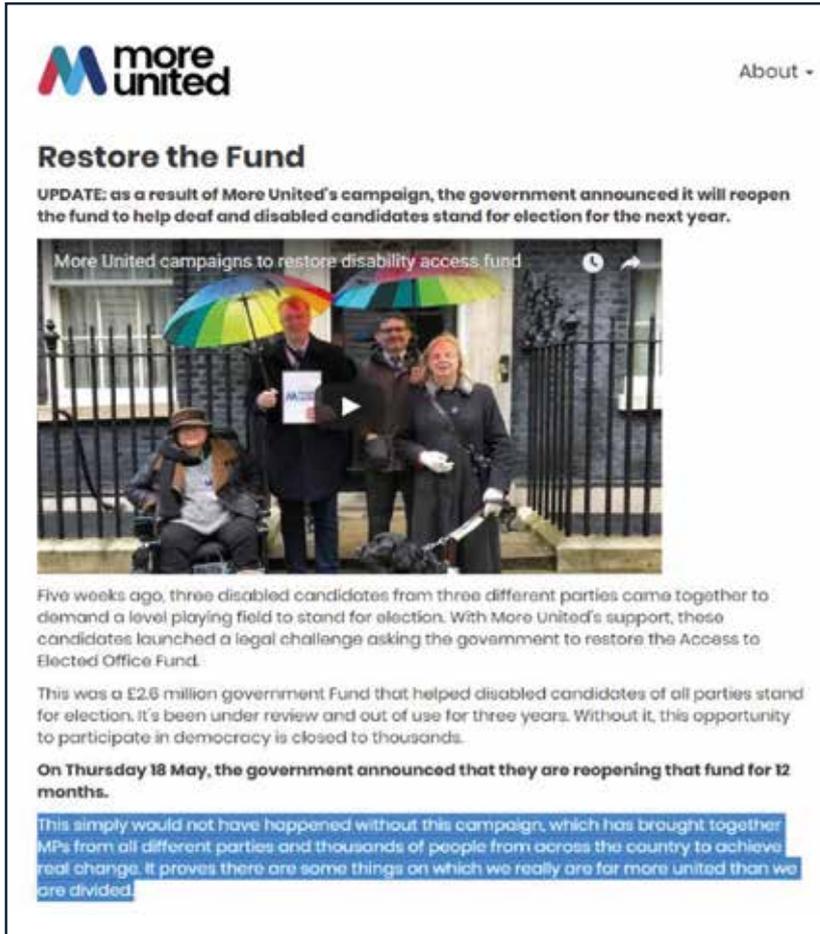
What motivates ongoing membership?

Motivations are not an infinite resource, they need to be cultivated and renewed in order to sustain ongoing membership. For this reason, organisations should maintain contact with members and articulate the motivation for membership, showing the impact that membership has.

Even for members who don't want to engage, communication that shows the benefits and returns of membership is an important way of renewing motivations. Emailing supporters to show how much was raised by funding email requests, and social media content that communicates how many campaign actions were taken helps to build a sense of community, achievement and change, renewing people's motivation for being involved. The below example from More United shows a communicated success, but membership organisations can also thank people for their contributions or relay stories that help reinforce the value of membership.

STORY 9:

"If you resign today, you have to write in...if you write in, it can be email or letter. When we get that, we respond accordingly. So, you say you're resigning because, I don't know, you're not focusing on the environment enough. Then we have set responses that we'll add to them and at the bottom say, "We need your response in order to continue. Will you please stay knowing what you know now or are you still going to resign?" So, we give them time to think about what they're doing and give them food for thought...and that has really put a slight pin in people resigning...that's one thing the party can do and has done."



more united About -

Restore the Fund

UPDATE: as a result of More United's campaign, the government announced it will reopen the fund to help deaf and disabled candidates stand for election for the next year.

More United campaigns to restore disability access fund

Five weeks ago, three disabled candidates from three different parties came together to demand a level playing field to stand for election. With More United's support, these candidates launched a legal challenge asking the government to restore the Access to Elected Office Fund.

This was a £2.6 million government Fund that helped disabled candidates of all parties stand for election. It's been under review and out of use for three years. Without it, this opportunity to participate in democracy is closed to thousands.

On Thursday 18 May, the government announced that they are reopening that fund for 12 months.

This simply would not have happened without this campaign, which has brought together MPs from all different parties and thousands of people from across the country to achieve real change. It proves there are some things on which we really are far more united than we are divided.

How does the process of membership encourage retention?

Having effective mechanisms for people to join is essential, but it is also key to think about ways of making them stay. Using a default direct debit system and automatic renewal helps prevent the wastage of members that is often hidden in headline membership figures. Other options such as lifetime membership can build in mechanisms to keep membership levels high. By designing effective processes, incidental loss of membership can therefore be minimised. As story 9 outlines, political parties have put effective mechanisms in place to convince disenchanted members to stay in the organisation.

Many organisations have centralised membership systems that automatically enrol new members on a direct debit basis. This should be the objective for all organisations and types of membership subscription - with parties seeking to encourage existing members to sign up like this.

What triggers people to leave organisations?

There will inevitably be triggers that cause people to leave organisations. For political parties these might include a policy decision (such as engaging in an unpopular war) or entering an electoral pact. However, decisions might also be driven by more personal factors such as loss of income or moving house. Organisations should ensure that it is only points of ideological or policy disagreement that trigger these decisions. It should not be an absence of motivation or poor process.

CHECKLIST FOR MEMBERSHIP ORGANISATIONS

Motivations, processes and triggers are a critical and yet overlooked aspect of membership. As organisations confront the challenges of building resource and securing legitimacy, we argue that this model can help them to recruit, engage and retain members. Instead of a summary we present a simple checklist to ensure that these mechanisms are in place.

1. Think about your members' motivations

- Have you collected your members' reasons for joining?
- Have you shared membership stories and motivations?
- Do you thank members for engaging and volunteering their time?
- Do you give members feedback on the outcomes of their activities?
- Do you target opportunities for activism in line with people's interests?
- Do you offer opportunities for people to get involved that vary in terms of appeal, time and level of commitment and knowledge?

2. Review your membership processes

- Have you conducted a mystery shopper exercise to check that your processes work?
- Have you installed a direct debit system by default?
- Do you have lifetime membership as an option?
- Have you highlighted motivations for joining and remaining in the party on your website?
- Have you produced central guides and shared best practice in recruitment, activation and retention?

3. Capitalise on triggers

- Have you identified existing events, activities and catalysts for joining or taking action in your organisation?
- Can you piggyback on external events to drive membership and cultivate engagement?
- Can you orchestrate events that might drive membership and cultivate engagement?
- Do you mainstream membership recruitment and engagement as a part of your other activities?
- Have you ensured that only triggers and factors beyond your control cause membership loss?

FURTHER READING

Audickas, L., Dempsey, N. and Keen, R. (2018), 'Membership of UK Political Parties', *Briefing Paper Number SN05125*, available at <http://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN05125> accessed 03/07/2018.

Bardi L., Calossi, E. and Pizzimenti, E. (2017), 'Which Face Comes First? The Ascendancy of the Party in Public Office' in Scarrow, S.E, Webb, P.D and Poguntke, T. (eds.), *Organising Political Parties: Representation, Participation and Power*, (Oxford: Oxford University Press).

For more on motivations see:

Seyd, P. and Whiteley, P. (1992), *Labour's Grassroots: The Politics of Party Membership*, (Oxford: Clarendon Press).

Webb, P., Poletti, M. and Bale, T. (2017), 'Why is it only some people who support parties actually end up joining them? Evidence from Britain', Paper prepared for the ECPR General Conference, Oslo, September 2017, available at <https://ecpr.eu/Filestore/PaperProposal/c2f17640-7890-46c4-ab64-fd993e1efbca.pdf>, accessed 03/07/2018.

For other reports on engaging members of organisations more generally see:

Brodie, E., Hughes, T. Jochum, V., Miller, S., Ockenden, N. and Warburton, D. (2011), *Pathways through participation: what creates and sustains active citizenship?* Available at https://web.archive.org/web/20170203004945/http://pathwaysthroughparticipation.org.uk/wp-content/uploads/sites/3/2011/09/Pathways-Through-Participation-final-report_Final_20110913.pdf, accessed 03/07/2018

New Citizenship Project (2016), *The future of membership: a collaborative innovation project*, available at <https://www.thefutureofmembership.info/>, accessed 03/07/2018.

For more research on British party members see:

Bale, T., Webb, P. and Poletti, M. (2018), *Grassroots – Britain's party members: who they are, what they think, and what they do*, available at https://escrcpartymembersprojectorg.files.wordpress.com/2018/01/grassroots-pmp_final.pdf, accessed 03/07/2018.

ABOUT THIS RESEARCH:

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