

# Becoming Five Multiplication Study

## RESEARCH REPORT

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## Introduction: Five Levels of Multiplication

Exponential developed a simple framework for helping churches think about multiplication. This framework integrates mathematical truths into five levels: subtraction (Level 1), plateau (Level 2), addition (Level 3), reproduction (Level 4), and multiplication (Level 5).

The five levels are summarized as follows:

**Level 1** - Level 1 churches are characterized by subtraction, scarcity, and survival. These churches experience some combination of declining attendance, staffing, income, and conversions. Without a turnaround, Level 1 churches eventually close.

**Level 2** - Level 2 churches are plateaued and looking for the next catalyst to spark a season of growth. These churches experience some combination of flat attendance, staffing, income, and conversions. These churches may see temporary ups and downs, but their overall trend is flat.

**Level 3** - Level 3 churches are characterized by addition, growth, and expansion of impact. These churches have a strong growth culture with some combination of increasing attendance, staffing, income, and baptisms. Leadership development and conquering the next growth barriers are often key priorities in these churches.

**Level 4** - Level 4 churches are characterized by the value and priority they place on starting new churches. They value church planting and have a strong programmatic emphasis on starting new churches. They see their fruit as more than the apples on their own tree, but by the other trees they plant in the orchard (or the new orchards they start). These churches continually feel the tension pulling them toward investing in addition at their own church.

**Level 5** - Level 5 churches are characterized by multiplying, releasing, and sending everyday missionaries and church planters. Multiplication is so deeply embedded in the DNA of these churches that they would need a strategy to stop the multiplication. These churches plant churches that plant churches to the 4<sup>th</sup> generation resulting in 100s of churches in their multiplication family. These churches reach non-Christians at a much higher rate of conversion than other churches and see disciple-making to the fourth generation as a cultural norm.

All churches have a core context or behavior in Level 1, 2 or 3. In other words, all churches can be characterized with a primary distinctive of subtracting (declining), plateauing, or adding (growing). This Lifeway Study seeks to categorize all surveyed churches into a primary context or pattern of Level 1, 2 or 3.

The additional characteristics of reproducing (Level 4) and multiplying (Level 5) are only exhibited by a small percentage of U.S. churches. These Level 4 and 5 contexts can extend from the core context of Level 1, 2 or 3 behavior.

## Purpose of Study

The primary purpose of this study is to measure the percentage of U.S. Protestant churches that exhibit Level 4 or 5 behaviors and to understand how these Level 4 and 5 behaviors align with the core context of Levels 1, 2 and 3. A secondary purpose is to identify additional factors that statistically contribute to Level 4 and 5 cultures.

## Executive Summary

### Church Growth Context (Levels 1, 2 and 3)

According to each of the growth metrics utilized, most Protestant churches are not growing. This is true for finances, attendance, and staffing. We also see the majority of churches experiencing low rates of new people coming to follow Christ and a lack of involvement in church planting. Using scoring based on the metrics in the study, 35% of churches have been categorized as Subtracting, 35% as Plateauing, and 30% as Adding.

Level 1 Subtracting	35%
Level 2 Plateauing	35%
Level 3 Adding	30%

### Church Reproduction and Multiplication Context (Levels 4 and 5)

32% of Protestant churches were at least minimally involved in planting churches in 2018, while 68% had no involvement. For most of these 32%, their investment in church planting was indirect or minimal. Based on the aggregation of responses to the church planting questions in the survey, 7% of Protestant churches are considered to be Reproducing (Level 4), and 0% are Multiplying (Level 5).

Level 4 Reproducing	7%
Level 5 Multiplying	0%

## Methodology

The goal of the 2019 Becoming Five Multiplication Study was to objectively and statistically measure how many Protestant churches are at each of the five levels today, using a representative sample. The project was sponsored by Exponential.

### Survey Protocol

- Phone survey of 1,000 Protestant pastors was conducted by LifeWay Research January 14 – 30, 2019.
- The calling list used a random sample stratified by church size, drawn from a list of all Protestant churches.
- Quotas were used to maintain the correct proportion of each church size.
- Responses were weighted by region to more accurately reflect the population.
- Each interview was conducted with the senior pastor, minister or priest of the church called.
- The survey consisted of 16 questions, 8 to discern the core context of Levels 1 – 3, and 8 to discern Levels 4 and 5.
- Survey questions were designed to measure actual behaviors and not aspirations or good intentions.
- The completed sample is 1,000 surveys.
- The sample provides 95% confidence that the sampling error does not exceed  $\pm 3.2\%$ . Margins of error are higher in sub-groups.
- Data was compiled into over 20 different tables.
- Responses were analyzed through the lens of the five levels of multiplication based on observable behaviors.
  - Each church was placed into a core context of Subtracting (Level 1), Plateaued (Level 2), Adding (Level 3).
  - Scoring also evaluates whether each church qualifies as Reproducing (Level 4) or Multiplying (Level 5).

### Measuring Levels 1 – 3

To determine which Protestant churches should be categorized as Subtracting (Level 1), Plateauing (Level 2), or Adding (Level 3), participants were asked a series of questions to measure the presence of objective indicators of growth or decline.

The most important metric is that of change in average worship attendance over the last three years. However, attendance is not the only measure that indicates where a church is at in terms of its posture, orientation, and trajectory. This starting position is modified based on a series of additional questions that include changes in offerings and spending, changes in staffing levels, the number of new commitments to Christ per attendee, opening new sites, and financially supporting church plants.

Churches unable to provide their current attendance or attendance three years ago were excluded from this scoring and categorization.

No one metric solely determines categorization. Two churches could have relatively stable attendance over the past 3 years, and one could be considered Level 1 and another Level 3 based on other measures of growth and decline. Likewise, a church that has grown in attendance and one that has declined could both be categorized as Level 2 based on the aggregation of additional context from other measures of addition and subtraction.

All churches were assigned a core growth context of Level 1, 2 or 3. All churches were also asked about their involvement in church planting. Churches that indicated any involvement in church planting were asked additional questions to discern whether Level 4 and 5 behaviors were present.

## **Measuring Levels 4 and 5**

To determine which Protestant churches should also be categorized as Reproducing (Level 4) or Multiplying (Level 5), participants were asked additional questions to measure the presence of objective indicators of reproduction and multiplication. To be evaluated as Reproducing (Level 4), a church must be participating in church planting by opening an autonomous church in the last year that the church was involved in and providing ongoing, direct financial support to church plants.

The metrics that qualify a church as reproducing require being substantially involved in starting new churches beyond being minimally or aspirationally involved. Functionally, the threshold of investment for Level 4 categorization is intended to be greater than that required for a typical church to simply add additional church services.

To measure whether a church should be categorized as Multiplying (Level 5), the church must qualify as Reproducing (Level 4), be directly involved in a greater number of church plants opening each year, and show significant activity in raising up church planters, preparing them, sending them, and financially supporting them. Multiplying churches also plant churches that at least reproduce at Level 4 for multiple generations into the future.

# Key Findings

## Level 1 Declining / Subtracting Churches

Level 1 Declining churches are characterized by subtraction, scarcity, and survival. These churches experience some combination of declining attendance, staffing, income, and conversions. Without a turnaround, these churches eventually close. 35% of all Protestant churches are declining (Level 1) according to the scoring protocol utilized in this study.

### 35% of all Protestant Churches are Declining / Subtracting

Indicators of Level 1 Declining / Subtracting churches:

#### **Declining Attendance**

28% of Protestant churches report average worship attendance dropping by 6% or more compared to 3 years ago.

#### **Declining 2018 Income**

The percentage of pastors reporting growth in total offerings has steadily risen since the last recession. Despite the positive external economic forces, 15% of pastors report their calendar year offerings in 2018 were below 2017's. This includes 7% whose offerings dropped by 10% or more compared to 2017.

#### **Projected Decline in 2019 Spending**

For 2019, 14% of pastors say that spending will be more than 3% lower than in 2018.

#### **Decline in Paid Staff**

7% of churches decreased their paid staff in 2018 compared to 2017. Very few churches are planning to decrease their staffing level in 2019, with only 2% saying the number of paid staff will decrease.

#### **New Commitments to Jesus Christ as Savior**

The majority of Protestant churches had less than 10 people indicate a new commitment to Jesus Christ as Savior in the past 12 months.

35% of churches have had less than 5 people indicate a new commitment to Jesus Christ as Savior through their church in the past 12 months, including 8% who have had no new commitments to Christ. Since different size churches have different numbers of people to share the gospel, a measure of new commitments per 100 attendees was used in the analysis. 35% of churches had between 0 and 4 new commitments per 100 attendees.

## Level 2 Plateauing Churches

Level 2 Plateauing churches may feel “stuck” and are often looking for the next catalyst to spark a season of growth. They seek momentum in the direction of growth. These churches experience some combination of flat attendance, staffing, income, and conversions. These churches may see temporary ups and downs, but their overall trend is flat. 35% of all Protestant churches are Level 2 according to the scoring protocol utilized in this study.

### 35% of all Protestant Churches are Plateauing

Indicators of Level 2 Plateauing churches:

#### **Plateaued Attendance**

33% of Protestant churches report average worship attendance within 5% of attendance 3 years ago.

#### **Plateaued 2018 Income**

30% of pastors report their calendar year offerings in 2018 were the same as 2017's. 44% indicate their 2018 offerings were within 3% of their 2017 offerings.

#### **Projected Plateau in 2019 Spending**

For 2019, 46% of pastors say that spending will be within 3% of 2018 expenditures.

#### **Plateau in Paid Staff**

79% of pastors say that the number of paid staff stayed the same in 2018. Most Protestant churches are smaller churches including 44% in this study that have 1 or fewer full-time staff including the pastor. For smaller churches it would take growth far beyond the typical 2-3% growth in income to pay for an additional part-time or full-time staff member. 81% of churches expect their paid staff count to stay the same in 2019.

#### **New Commitments to Jesus Christ as Savior**

32% of churches had between 5 and 9 new commitments per 100 attendees. Combined with the 35% indicating less than 5 new commitments per 100 attendees, this means that 67% of churches have less than 10 new commitments for every 100 attendees.

#### **Participation in Helping Start New Churches**

68% indicated no involvement in participating in helping start new churches in the last 12 months.

#### **Opening New Sites**

3% of churches opened a new multi-site campus in the past 12 months.

## Level 3 Growing Churches

Level 3 Growing churches are characterized by addition, growth, and expansion of impact. These churches have a strong growth culture with some combination of increasing attendance, staffing, income, and baptisms. Leadership development and conquering the next growth barriers are often key priorities in these churches. 30% of all Protestant churches are Level 3 according to the scoring protocol utilized in this study.

### 30% of all Protestant Churches are Adding

Indicators of Level 3 Adding churches:

#### **Growing Attendance**

39% of Protestant churches report average worship attendance growing by 6% or more compared to 3 years ago.

#### **Growing 2018 Income**

With positive external economic forces, 48% of pastors report their calendar year offerings in 2018 were above 2017's. This includes 23% whose offerings grew by 10% or more compared to 2017.

#### **Projected Growth in 2019 Spending**

For 2019, 39% of pastors say that spending will be more than 3% higher than in 2018.

#### **Growth in Paid Staff**

12% of churches increased their paid staff in 2018 compared to 2017. 15% plan to increase their staffing level in 2019.

#### **New Commitments to Jesus Christ as Savior**

33% of churches had 10 or more new commitments per 100 attendees, including 8% who reported 25 or more new commitments per 100 attendees.

#### **Participation in Helping Start New Churches**

32% indicated at least some involvement in participating in helping start new churches in the last 12 months.

#### **Opening New Sites**

3% of churches have opened at least one new multi-site campus in the past 12 months. Less than 1% have opened more than one new multi-site campus in the past 12 months.

## Level 4 and 5 Reproducing and Multiplying Churches

Level 4 Reproducing churches are characterized by the value and priority they place on starting new churches. They value church planting and have a strong programmatic emphasis on starting new churches. They see their fruit as more than the apples on their own tree, but by the other trees they plant in the orchard (or the new orchards they start). These churches continually feel the tension pulling them toward investing in addition at their own church. 7% of all Protestant churches are Level 4 according to the scoring protocol utilized in this study.

### 7% of all Protestant Churches are Reproducing

Level 5 Multiplying churches are characterized by multiplying, releasing, and sending everyday missionaries and church planters. Multiplication is so deeply embedded in the DNA of these churches that they would need a strategy to stop the multiplication. These churches plant churches that plant churches to the 4<sup>th</sup> generation resulting in 100s of churches in their multiplication family. None of the 1,000 churches analyzed in the study were categorized as Level 5.

### 0% of all Protestant Churches are Multiplying

#### **Direct Involvement in 2018 Church Plant Openings**

Among all Protestant churches, 12% were directly or substantially involved in opening an autonomous church in 2018. This shows far fewer at this level of involvement compared to the 32% who indicated they had some involvement in helping start new churches this last year. The difference is those whose involvement was indirect or is with a church plant that has not yet launched or launched in previous years.

#### **Direct Giving to Church Plants**

Among Protestant churches 14% say that more than 1% of their budget went directly to church plants or church planting ministries in 2018. The same percentage plans to give more than 1% directly to church plants in 2019.

#### **Church Planting Activities**

In the last year, the most common church planting activities are providing support services to planters (19%) and participating in a church planting network (17%). The types of “support services” were not specified on the survey, but likely include help with technology, accounting, space, etc. Developing church planters through assessing, training, and coaching is engaged in by 7-9% of Protestant churches.

#### **Starting Church Plants that Plant**

9% of all Protestant churches indicate that any of the church plants they have helped start have directly started a new, autonomous church in the last 5 years. Note: This estimate may be slightly low since it was only asked of churches currently doing anything to help church plants. It is possible for a church to have ceased their church planting efforts but their daughter church could have birthed another in the last 5 years.

### **Types of Church Plant Sponsorship**

7% of Protestant churches were directly involved in opening a church plant in 2018 and were a primary sponsor or ongoing financial sponsor of a church plant. These two thresholds of ongoing financial support directly to a church plant and opening a church plant in the last year narrow considerably the number of churches who are reproducing.

### **Lay Leaders Becoming Church Planters**

2% of all Protestant churches opened a church plant in 2018 and had one or more lay leaders leave to be the leader of a new, autonomous church. Most of the church planting that churches are doing is not through church planters that they disciplined and trained from within their own church.

## **Levels by Church Size**

While churches of all sizes are eligible to be categorized in any level, there are certain behaviors in the categorization associated with churches of different sizes, and churches with a sustained growth pattern are naturally going to tend to also be larger in size. Below is an examination of the percentage of churches in each level among different sized churches.

### **Among Churches with an Average Attendance Less than 50**

- 44% are Subtracting (Level 1)
- 36% are Plateaued (Level 2)
- 20% are Growing (Level 3)
- 4% are Reproducing (Level 4)
- 1.7 times less likely to be Level 3 compared to all other churches
- 1.9 times less likely to be Level 4

### **Among Churches with an Average Attendance 50-99**

- 37% are Subtracting (Level 1)
- 30% are Plateaued (Level 2)
- 33% are Growing (Level 3)
- 5% are Reproducing (Level 4)
- 1.2 times more likely to be Level 3 compared to all other churches
- 1.6 times less likely to be Level 4

### **Among Churches with an Average Attendance 100-249**

- 30% are Subtracting (Level 1)
- 40% are Plateaued (Level 2)
- 30% are Growing (Level 3)

- 7% are Reproducing (Level 4)
- Equally likely to be Level 3 compared to all other churches
- Equally likely to be Level 4

**Among Churches with an Average Attendance 250 or More**

- 23% are Subtracting (Level 1)
- 35% are Plateaued (Level 2)
- 42% are Growing (Level 3)
- 19% are Reproducing (Level 4)
- 1.4 times more likely to be Level 3 compared to all other churches
- 3.3 times more likely to be Level 4

## Appendix

### Survey Questions

**1** – “Three years ago (First Quarter 2016), what was your church’s average worship attendance on a typical weekend (including all ages from babies to adults but not counting anyone twice)?”

**2** – “Compared to your calendar year 2017 offerings, were your total offerings for 2018 above 2017’s, below 2017’s, the same as 2017, or not sure?”

**3** – “Approximately what percentage were your calendar year 2018 total offerings above/below 2017’s offerings?”

**4** – “How did your church’s total number of paid staff in 2018 compare to 2017? In counting paid staff use Full Time Equivalents in which two half-time staff or four quarter-time staff would equal one full-time.”

**5** – “For 2019, do you anticipate the number of paid staff to be more or less than 2018? In counting paid staff use Full Time Equivalents.”

**6** – “For 2019, is your church planning or budgeting to spend a higher or lower amount than 2018?”

**7** – “In the past 12 months, how many people have indicated a new commitment to Jesus Christ as Savior through your church?”

**8** – “During the past 12 months, has your church ...”

- Conducted one or more short-term mission trips
- Sent out long-term (ten or more weeks) missionaries from your congregation
- Prayed at least once a month for missionaries as a church
- Prayed at least once a month for a specific mission field or people group as a church
- Participated in helping start new churches
- None of these
- Not sure (Do not read)

**9** – “In the past 12 months, how many new multisite campuses did your church open?”

**10** – “In 2018, how many autonomous church plants opened that your church was directly or substantially involved in?”

**11** – “Which of the following best describes your church’s type of sponsorship or help of a new church (or churches) that opened in the last 12 months?”

- Our church accepted direct financial responsibility for the new church as primary sponsor.
- Our church provided ongoing, financial support directly to the church plant, in partnership with other churches.
- Our church provided one-time financial support directly to the church plant (for example, a one-time cash gift)
- Our church did not directly help financially but contributed to a network or denomination that supports church planting
- Our church did not help financially but provided other tangible in-kind support such as a donation of equipment, conducting a mission trip to assist the new church or providing rent-free meeting space
- Not sure (Do not read)

**12** – “In the past 12 months, how many lay leaders from your church left to be the leader of a new, autonomous church?”

**13** – “In 2018, approximately what percentage of your budget or spending went directly to church plants or church planting ministries? This does not include general contributions to a network or denomination, but financial support exclusively for church planting”

**14** – “In 2019, approximately what percentage of your budget is designated directly to church planting? This does not include general contributions to a network or denomination, but financial support exclusively for church planting.”

**15** – “In 2018, which if any of the following church planting activities did your church actively have in place? (Choose all that apply)”

- Recruiting church planters
- Assessing church planters
- Training church planters
- Coaching church planters
- Providing support services to church planters
- Conducting a church planting intern or residency process
- Participating in a church planting network or ministry
- None of these

**16** – “Approximately what percentage of the church plants that your church has helped start in the last 5 years have directly started other new, autonomous churches?”