Audience knowledge digest

Why people visit museums and galleries, and what can be done to attract them

March 2007
Contents

1  Introduction 7

2  Trends in leisure time and the factors affecting how it is spent 8

2.1  Leisure time in the UK: time pressured 8

2.2  Days out 9

2.3  Day trips 9

2.4  Visiting to leisure attractions 10

2.5  The changing leisure context – trends affecting leisure consumption 12

2.6  How consumer change trends affect arts consumption 15

3  Who visits museums? 18

3.1  Visiting levels 18

3.2  Visiting trends over time 18

3.3  Gender 19

3.4  Age 19

3.5  Party size and composition 19

3.6  Geographical origin 19

3.7  Visiting patterns 20

3.8  Intentional and incidental visiting 22

3.9  Social class / grade 22
3.10 Education 23
3.11 Ethnicity 24

4 Why do people visit museums? 26
4.1 Reasons to make a visit 26
4.2 Motivations for visiting 27
4.3 The audience pyramid 33
4.4 Risk 34
4.5 How and why people participate in the arts 37
4.6 The family audience 39
4.7 The role of temporary exhibitions 49
4.8 The role of special events 53
4.9 The role of new product development 56

5 Segmentation of museum and gallery visitors 58
5.1 Why segment? 58
5.2 Segmentation systems 58
5.3 Application of segmentation 60

6 Publicity, awareness and marketing 63
6.1 Relative success of different tools 63
6.2 Awareness of free entry 64
6.3 The role of recommendation 65
6.4 The role of school visits 67
6.5 The role of social visiting 68
6.6 Mass media 70
6.7 Print 71
6.8 On site 73
6.9 Guerilla / stealth marketing 73
6.10 Customer relationship management 74
6.11 The internet 78
6.12 Mobile marketing 92

7 Measures of success 97
7.1 Satisfaction 97
7.2 Attitudes post visit 97
7.3 Against motivation 98
7.4 Exceeding expectations 98

8 Why are non-visitors staying away? 99
8.1 General profile of non-visitors 99
8.2 Barriers to attendance 100
8.3 Social class 104
8.4 Cultural identity 104
8.5 Families 108
8.6 Young people 109
8.7 Older people 115
8.8 Factors beyond 'barriers' 117

9 Conclusions and recommendations 120
Introduction

The North East Museums Hub led by Tyne & Wear Museums commissioned Morris Hargreaves McIntyre to undertake a survey of existing research on museum and gallery audiences in the UK, with a particular focus where possible on the North East region.

The aim of this project is to provide the North East with a digest of the wealth of information currently available nationally on audiences, to avoid unnecessary duplication of extant knowledge and help to focus the hub’s future research plans.

In particular, the digest would cover:

**Drivers to visiting**
- Factors informing people’s decisions on how they spend their leisure time.
- How families make the decision to visit
- Advance planning and incidental visiting
- The prompts for visiting, including the role of special events and exhibitions, and the types of exhibitions and events that appeal to visitors.
- How often visitors visit.
- What the barriers to attendance are for infrequent / non-attenders.

**Promotional tools**
- Which promotional tools are most effective in reaching specific audiences (this is general audiences, but specifically older people, young people and people from lower socio-economic grades).
- Exploration of new methods used to reach wider audiences.
- The potential role of emerging communications tools within the museum sector.

Tyne & Wear museums were particularly interested in gaining practical insight into the potential for marketing exhibitions, events and the general offer to current and potential audiences. We have used case studies to illustrate examples of marketing good practice where possible.
2 Trends in leisure time and the factors affecting how it is spent

2.1 Leisure time in the UK: time pressured

The UK has the longest working week in Europe: UK adults have 60 hours of free time per week on average. The average number of hours of free time has reduced over the past three decades. (The Henley Centre 2000a).

There is a need to balance the exertion of work by seeking and enjoying leisure time as an end in its own right (Nvision 2006b).

Lots of leisure pursuits are now competing for limited free time. Time has become a currency for many people; value for time is just as important as value for money (The Henley Centre 2000a).

As the chart below shows, free time is particularly squeezed for some: those working full-time and those with dependent children have significantly less free time than other groups. (The Henley Centre 2000) Time is becoming a precious resource.

Free time by gender and lifestage

![Chart showing free time by gender and lifestage]
2.2 Days out

More time spent in 'third spaces' than ever before

We spend an ever-growing proportion of our leisure time 'out and about'. Time not spent at home, at work or travelling has more than doubled since 1960 (nVision 2006c).

60% of the population agree that they enjoy a wide range of culture and entertainment, from serious culture to light entertainment (nVision 2006b). Variety and personal fulfilment are leisure goals.

Increasing diverse activities consumed by individuals

People have different identities and operate in different modes depending on their role and needs at any particular point in time. The same consumer can vary in behaviour more on two different occasions than two different consumers on the same occasion (Henley Centre 2000b).

We pack an ever wider range of leisure activities into a similar amount of time: the leisure market is becoming increasingly fragmented. The number of different leisure activities engaged in during 12 month period has increased from 5.5 in 1970, to 10.3 in 2000 (nVision 2006c).

2.3 Day trips

Cultural attractions account for relatively few trips made

80% of GB adults (aged 16+) make at least one leisure day visit from home in a two week period, making an average of 4.3 trips. (Countryside Agency 2003).

Over a 12 month period, the estimated total number of day trips made by residents of England, Wales and Northern Ireland was in the region of 4,899 million trips. Visits to leisure attractions, places of interest and special events or exhibitions accounted for only 3% of all trips made (Countryside Agency 2003).

Distance and class as key factors affecting trip taking

Trip takers are significantly more likely to be drawn from the higher socio-economic grades ABC1 and more likely to come from car owning households than non-trip takers (Countryside Agency 2003).

Travel time is of key importance on day trips – the availability of attractions in the vicinity of the consumer’s home has considerable bearing on their activities. Attractions can view residents living within one hour’s drive time as
being their core days out customers, with those living between one and two hours away as the next most important. The proximity and site of a local attraction is often a stronger factor than its actual character in influencing the decision to visit. (Mintel 2006)

2.4 Visiting to leisure attractions

Nine in ten UK adults are recent leisure visitors

91% of adults in the UK have engaged in at least one cultural activity in the past 12 months. 42% have visited a museum or gallery, 69% have visited an historic environment site and 66% have attended an arts event. (DCMS 2006a).

People those who participate in cultural activities are also more likely to participate in sporting activities and vice-versa (DCMS 2003).

Mintel define days out as ‘a visit made to an attraction or place that takes up a substantial portion of the day, typically three hours or more’. Research carried out by Mintel (Mintel 2006) found that there were an estimated 492 million visits to attractions in the UK during 2005, spread across approximately 7,000 attractions for which visitor figures are available.

Places visited for a day in the past 12 months

<table>
<thead>
<tr>
<th>Attraction Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seaside resort</td>
<td>43%</td>
</tr>
<tr>
<td>City/town</td>
<td>32%</td>
</tr>
<tr>
<td>Retail complex</td>
<td>25%</td>
</tr>
<tr>
<td>Country park</td>
<td>24%</td>
</tr>
<tr>
<td>Stately home/historic place</td>
<td>24%</td>
</tr>
<tr>
<td>Zoo/wildlife/safari park/acquarium</td>
<td>24%</td>
</tr>
<tr>
<td>Museum/art gallery</td>
<td>23%</td>
</tr>
<tr>
<td>Beauty spot</td>
<td>21%</td>
</tr>
<tr>
<td>Theme park (with inclusive ticket)</td>
<td>18%</td>
</tr>
<tr>
<td>Leisure complex</td>
<td>16%</td>
</tr>
<tr>
<td>Garden</td>
<td>16%</td>
</tr>
<tr>
<td>Sports event</td>
<td>18%</td>
</tr>
<tr>
<td>Country fair/show/rally</td>
<td>16%</td>
</tr>
<tr>
<td>Farm</td>
<td>14%</td>
</tr>
</tbody>
</table>
A relatively small core of regular culture visitors

However, in the DCMS analysis of the 2000 UK time use survey, 24% of the population were termed ‘Cultural slouches’, participating in very few activities at all. 54% were termed ‘Cultural consumers’, favouring shopping or more popular activities such as attending the cinema or watching sports events in their leisure time. This leaves only 22% of the population who have a reasonably high probability of taking part in the sorts of leisure activities we are interested in.

Similarly, cluster analysis carried out by Mintel into the UK days out market found that 56% of the UK population were ‘apathetic’ in their leisure consumption; either never going on days out or only doing so occasionally. The chart below illustrates Mintel’s breakdown of the days out market (Mintel 2006). The findings suggest that the leisure days out market is largely populated by a limited number of individuals, with a fixed amount of free-time who ‘dabble’ in a relatively large number of leisure activities. Competition for consumer leisure time is intense.

![UK days out market chart]

Over a third of UK adults are recent museum / gallery visitors

The provisional results of the DCMS Taking Part survey (DCMS 2006b) show that 42% of adults had been to at least one museum or gallery during the past 12 months. This is probably higher than the Mintel results above as the chart above shows a ‘day out’ to the venue – the DCMS definition is broader. A recent MORI survey (MORI 2004) found that 37% of adults had been to a museum or art gallery in the last 12 months (this was a much smaller sample than Taking Part).
Museum visitors tend to be older and from higher social grades

The table below shows the proportion of each age, socio-economic and lifestage group who have visited selected venues in the past 12 months (Mintel 2006). This shows that museums and galleries have a fairly similar profile to historic properties, although museums attract far more young visitors. Visitors to museums and galleries tend to be from the higher socio-economic groups (ABC1).

<table>
<thead>
<tr>
<th>% All adults visited attraction</th>
<th>Museum / art gallery %</th>
<th>Stately homes / castles / other historic places %</th>
<th>Beauty spot %</th>
<th>Retail complex %</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>23</td>
<td>24</td>
<td>21</td>
<td>25</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15-19</td>
<td>19</td>
<td>11</td>
<td>10</td>
<td>19</td>
</tr>
<tr>
<td>20-24</td>
<td>21</td>
<td>12</td>
<td>10</td>
<td>27</td>
</tr>
<tr>
<td>25-34</td>
<td>23</td>
<td>21</td>
<td>21</td>
<td>33</td>
</tr>
<tr>
<td>35-44</td>
<td>31</td>
<td>31</td>
<td>26</td>
<td>33</td>
</tr>
<tr>
<td>45-54</td>
<td>22</td>
<td>27</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>55-64</td>
<td>25</td>
<td>33</td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td>65+</td>
<td>15</td>
<td>23</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>SEG</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AB</td>
<td>40</td>
<td>40</td>
<td>32</td>
<td>30</td>
</tr>
<tr>
<td>C1</td>
<td>27</td>
<td>29</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>C2</td>
<td>17</td>
<td>20</td>
<td>19</td>
<td>27</td>
</tr>
<tr>
<td>D</td>
<td>15</td>
<td>15</td>
<td>12</td>
<td>23</td>
</tr>
<tr>
<td>E</td>
<td>9</td>
<td>11</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>Lifestage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre-/no family</td>
<td>27</td>
<td>19</td>
<td>19</td>
<td>29</td>
</tr>
<tr>
<td>Family</td>
<td>24</td>
<td>26</td>
<td>20</td>
<td>30</td>
</tr>
<tr>
<td>Empty nest</td>
<td>23</td>
<td>30</td>
<td>28</td>
<td>26</td>
</tr>
<tr>
<td>Retired</td>
<td>15</td>
<td>23</td>
<td>15</td>
<td>11</td>
</tr>
</tbody>
</table>

2.5 The changing leisure context – trends affecting leisure consumption

More older people, and more active older people

The UK has an aging population: by 2010 there will be nearly three million more 45-64 years olds and two million fewer 25-34 year olds (Henley Centre 2000a). This Baby-boomer generation will be wealthy, active and celebrating their age. Over the next five years, the 45-54 age group will expand by 11%. (Mintel 2006)
Less traditional family units

Non-traditional households are showing the fastest growth. One person, multi-person, lone parent and co-habiting households are showing rapid growth (Henley Centre 2000a).

More wealth, and more disposable income

In the last five years, the upper socioeconomic groups (AB and C1) have expanded by almost 12% and 10% respectively. This is good news for the days out market, which relies on disposable income. These groups will continue to grow over the next five years at a slower rate. Real incomes have grown considerably in the past decades and the majority of the UK is getting richer. People have more disposable income, a trend that is likely to continue in the future (Henley Centre 2000a).

Less rigid working structures

The typical 9-5 working week is changing, with a growth in part-time, flexible and contract working forecast (Henley Centre 2000a).

City centred

Increasingly mobile workers, regeneration and city living has seen a gravitation towards cities. Cities are viewed as tolerant and outward looking with good public spaces and culture.

More graduates

Trend data shows increases in the number of graduates in the UK and in the proportion of the population in the higher socio-economic groups, potentially increasing the proportion of the population who have the propensity to take part in cultural leisure activities. (Mintel 2006).

Desire for activities that contribute to wellbeing and rich quality of life

As people's basic material needs are satisfied we are moving up the hierarchy of needs, from wants to desires. Wellbeing is becoming more important than affluence (Henley Centre 2000a). People are prepared to pay more for experiences than goods. Consumers are looking for a range of leisure experiences, including those that offer an 'oasis' from their busy lives: experiences that provide a counterbalance to hectic work and leisure activity (nVision 2006b).

Backlash against globalisation and consumerism

There is a growing backlash against out-and-out consumerism. This goes hand in hand with an increased awareness of and support for environmental
issues. Naomi Klein (author of 'No Logo: Taking Aim at the Brand Bullies') has become the spokesman for a worldwide movement against multinationals and their insidious brands. The Times newspaper rated her one of the world's most influential people under 35. Published in at least seven languages, No Logo has touched a universal nerve.

As they move from merely validating products to encapsulating whole lifestyles, brands are evolving a growing social dimension. In the developed world, they are seen by some to have expanded into the vacuum left by the decline of organised religion. But this has made brands – and the multinationals that are increasingly identified with them – not more powerful, but more vulnerable. Consumers will tolerate a lousy product for far longer than they will tolerate a lousy lifestyle, with social responsibility becoming massively important in brand image. (The Economist, 2001)

Marketing savvy

Consumers are now bombarded with choices. They are ‘commercials veterans’, inundated with up to 1,500 pitches a day. Far from being gullible and easily manipulated, they are cynical about marketing and less responsive to entreaties to buy. Some of the most cynical consumers are the young. Nearly half of all American college students have taken marketing courses and know the enemy'.

Increased distrust in corporate messages – move towards word of mouth

A recent survey (Edelman’s 2006 Trust Survey, Edelman and Neilsen BuzzMetrics 2006), shows that people’s trust has shifted away from authority figures and towards ‘average people, like you’. 58% of Americans trust only the opinions of medics and academics more than they trust the opinions of people like themselves (68%). This means that people are increasingly disinterested in neatly packaged marketing messages, and want to engage and be engaged in conversations.

Increasing demand for quality experiences

People are becoming more demanding. Expectations of quality, value, friendly and flexible customer service are rising (nVision 2006b).

Need for personal content and service

Globalisation and affluence create a world of endless choice (nVision 2006c). Consumers are becoming increasingly selective. They have a greater expectation that what they access or purchase is personalised to their needs and interests.
2.6 How consumer change trends affect arts consumption

The Henley Centre (Henley Centre 2000a) have identified six key trends which attempt to explain the affect of big social changes on arts consumption.

Polyglotting

The erosion of traditional social structures of gender, religion class and education means that individual identities are becoming increasingly complex. Media and technology means that people now have access to a more diverse range of influences, lifestyles and cultures than ever before. People seek to actively self-define their identity through reference to these plural sources, meaning that identity itself is becoming increasingly diverse. The implications of this for the arts are:

- People will dabble more, ‘snacking’ on bitesized pieces of culture. Organisations therefore need to offer experiences appropriate to this mode of consumption.
- Diversity and speed become key to attracting audiences.
- There will be great competition for the attention of these consumers.

Authentiseeking

Decline in trust in global companies and the desire to be individual combined with the growing experience economy and the proliferation of virtual experiences has produced a growing desire to obtain the original against a mass market filled with falseness. Implications for the arts include:

- Increasing importance of seeing ‘the real thing’ against backdrop of virtual access and screen-based museum exhibits. Morris Hargreaves McIntyre have observed this trend in a number of recent projects, for example where there has been strong interest amongst general visitors in visiting museum stores to see real objects. It seems that digital access to collections can never be a replacement for the resonance of a real object.
- Increasing importance of live and original experiences to those who choose them.

Connoisseurship

Rise in disposable income and the increased need to actively create and assert individual identity combined with easier access to information and increasingly limited time means that people are looking to add value for time by becoming connoisseurs – in any subject, however obscure. Implications for the arts could be:
- Increase in interest from small specialist audiences for specific cultural products
- Increase in commitment to specific field of interest – increase in frequency but not necessarily loyalty to specific organisations
- Heightening exclusivity of some cultural activities

**Perfect moments**

Growing wealth and shrinking spare time together with heightened aspirations due to the exposure to celebrity lifestyles means that people are increasingly seeking experiences that offer fantasy as reality as an antidote to the pressures of modern life. Implications for the arts include:

- Increasingly demanding consumers who will expect all elements of the experience (including the toilets) to live up to their high expectations.
- Interest in value for time experiences – a market for concentrated (short, extreme) performances.
- Increasing need for flexible opening hours and programming times.
- The need for guarantees and risk-free choices.
- It may become more difficult to market ‘difficult’ and less immediate experiences.

**People as ‘players’**

Satisfaction of human needs as the lower level due to increasing income means that people are now looking to fulfil their wants – to escape from the increasingly pressurised daily grind, and are turning to play as a way to self-define. The implications for the arts include:

- High demand for interactive experiences.
- Growing interest in participation.
- Increased spending on leisure time, but more competition between leisure activities for customers.

**Communal yearning**

Consumers long to connect with each other, but the decline of traditional social structures, increased mobility, technology and less leisure time mean that the idea of ‘community’ is being defined. Implications include:

- Growing importance of social networking sites and social network marketing in targeting potential audiences.
- Growing importance of word of mouth recommendation.
• Trends of communities forming to participate in the arts.

• Trends of communities forming as a result of artistic engagement. For example the social outcomes of the Laing Art Gallery's People's Panel project for Passion for Paint were far more important to many participants than the learning outcomes.

**Personalisation and participation**

From the trends highlighted above, there is a clear move towards customised experiences, accessed at a time and in a way that suits the consumer and tailored to suit the consumer's needs. These together with the impact of information and communication technology, and the imperative for publicly-funded arts organisations to prove their value to the public, point to a clear trend towards personalised services and user participation.

The prospect of greater choice and personalised services is being used by the government to drive improvements in many areas of the public services, partly by raising voters' expectations for better, faster personalised services. This involves two main strands – equipping the user to tailor the experience to their needs, and allowing the user to coproduce the experience by actively participating in its production.

Arts organisations are therefore coming under increasing pressure to become responsive, customer-focused organisations and to engage customers in dialogue and collaboration. Some argue that personalisation could be a key source of product innovation for the arts, helping to ensure the visit experience is tailored to the needs of potential users. However, most arts organisations still offer predominantly preset programmes at fixed times and a single location. (Knell 2006)
3 Who visits museums?

3.1 Visiting levels

Museums and galleries are among the most popular cultural activities in the UK. Recent DCMS research (DCMS 2006c) found that 42% of adults in the UK had visited at least one museum or gallery during the past 12 months. MORI found that a higher proportion of the UK public visits museums and galleries than almost all other types of cultural venue, with the exception of cinema and libraries (MORI 2004).

There were an estimated 492 million visits to attractions in the UK in 2005, of which 26% were to museums and art galleries. This means there were an estimated 128 million visits to UK museums and galleries in 2005 (Mintel 2006).

3.2 Visiting trends over time

Trends in GB TGI data show that there has been a decline nationally in the proportion of people who visit museums over a ten year period.

<table>
<thead>
<tr>
<th>Year</th>
<th>% of population visited museums in last 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992/3</td>
<td>28%</td>
</tr>
<tr>
<td>2002/3</td>
<td>22% (10,359,000 adult museum visitors)</td>
</tr>
</tbody>
</table>

However, Sightseeing in the UK shows that more visits are being made. This suggests that fewer visitors are making more visits:

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998/9</td>
<td>23.96 million</td>
</tr>
<tr>
<td>2002/3</td>
<td>30.72 million</td>
</tr>
</tbody>
</table>

Repeat visits (made by people attending more than once per year) account for just under 50% of visits to DCMS-sponsored museums and this figure has also increased since 1998/9 (Matty 2004).
3.3 Gender

TGI data indicates that in 2002/3 museum attenders were split almost 50/50 between men and women. In the North East, 51% of museum visitors are male (Matty 2004).

3.4 Age

Nationally, museums have a fairly old visitor profile compared to the population as a whole. Around 13% of museum visitors nationally are aged 24 or under, whilst 27% are aged 55 or over. This trend has been particularly pronounced in the North East, where 10% of museum visitors are 24 or under, and 33% are 55 or over (Matty 2004).

Children (aged 15 or under) make 26% of visits to UK museums, and the number of visits made by children has risen by 3.42m since 2000/1 (MORI 2004) (Ipsos MORI 2005).

3.5 Party size and composition

Almost two-thirds (62%) of people are visiting North East venues with children, which is significantly above the national average. The Discovery Museum attracts 77% of its visits from family groups.

In the North East, there are 2.1 adults in a party on average (just below the national average of 2.5). This may be partly because of the high level of family visiting combined with the fact that single adult parties are more likely to be DEs, recent repeat visitors and live locally to the venue – all of these groups are relatively well represented in North East museums compared to national averages (Ipsos MORI 2005).

There is often a marked difference in group composition depending on when the visit is made. Research for new galleries at the Discovery Museum revealed that the audience is split between weekend visitors, who tend to be family groups visiting with children and weekday visitors who tend to be adults visiting in groups or lone male visitors (43% are lone adult visitors). On average, parties consisted of 1.9 people on weekdays and 3.8 on weekends. (Cultural Management Research 2002)

3.6 Geographical origin

Seven in 10 visitors to North East museums and galleries are ‘local’, living in the same town or region as the venue. (Ipsos MORI 2005)
The majority of visitors to both the Discovery Museum and Sunderland Museum and Art Gallery live within the local area, broadly consistent with national museums data. 81% of visitors to Sunderland Museum and Art Gallery live within a 60 minute drive time, with two thirds coming from less than 30 minutes away. 84% of visitors to the Discovery Gallery live within a 60 minute drive time.

3.7 Visiting patterns

Visiting to many museums and galleries

Nationally, the average number of visits made by an individual in a 12 month period varies in terms of life-stage. Young adults (aged 15-24) with no children have the lowest average visit frequency, making 2.9 visits per annum. This age group is the most under-represented in museum and gallery visitors. Adults aged 55-64 visit most often, averaging just under 4 visits per year. (MORI 2004)

The mean number of visits to other museums and galleries amongst visitors to North East museums is lower than then national average (5.3 compared to 6.4 nationally). Evidence suggests that repeat visitors from higher social classes tend to visit a wide variety of museums, whilst those from lower social classes are more likely to be loyal to one venue – the relatively high proportion of C2DE visitors in the region may therefore explain this pattern (Ipsos MORI 2005).

An analysis of 2001 data reveals that UK current visitors (people who have visited in the last 12 months) visit museums an average of four times per year, with 25% visiting only once per year.

The table below shows the frequency of visiting in the North East of visitors who have been in the last 12 months.

<table>
<thead>
<tr>
<th>Frequency</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once</td>
<td>32%</td>
</tr>
<tr>
<td>Twice</td>
<td>27%</td>
</tr>
<tr>
<td>3-5 times</td>
<td>21%</td>
</tr>
<tr>
<td>6-10 times</td>
<td>14%</td>
</tr>
<tr>
<td>11+ times</td>
<td>6%</td>
</tr>
</tbody>
</table>

(Skelton in Matty 2004)

Nationally, the cohort aged 35-44 were more likely to be visiting just once a year, with the 65+ groups more likely to visit 11+ times, or 3-5 times. This is probably directly related to time availability – 35-44 year olds are more likely to have work and family commitments, whilst retired people have more free time. However, there are undoubtedly issues around the image and perceptions of museums too.
Repeat visiting to the venue

Levels of repeat visiting in the North East are identical to the national average, with 59% of visitors having visited the particular museum or gallery before. Of these repeat visitors, almost three quarters (73%) had already visited within the last 12 months, and 26% had last visited over a year ago. (Ipsos MORI 2005)

The table below summarises repeat visiting to the various Tyne & Wear Museums (from Wood Holmes Group 2005 data).

<table>
<thead>
<tr>
<th>Name of venue</th>
<th>% of repeat visitors</th>
<th>% of people who are making a repeat visit in 12 months:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>% infrequent visitors (2 visits)</td>
</tr>
<tr>
<td>Laing Art Gallery</td>
<td>80%</td>
<td>28%</td>
</tr>
<tr>
<td>Sunderland</td>
<td>76%</td>
<td>26%</td>
</tr>
<tr>
<td>South Shields</td>
<td>54%</td>
<td>40%</td>
</tr>
<tr>
<td>Hancock Museum</td>
<td>50%</td>
<td>68%</td>
</tr>
<tr>
<td>Shipley Art Gallery</td>
<td>50%</td>
<td>30%</td>
</tr>
<tr>
<td>Discovery Museum</td>
<td>47%</td>
<td>44%</td>
</tr>
<tr>
<td>Monkwearmouth</td>
<td>47%</td>
<td>28%</td>
</tr>
<tr>
<td>Arbeia Roman Fort</td>
<td>33%</td>
<td>66%</td>
</tr>
<tr>
<td>Segedunum</td>
<td>16%</td>
<td>73%</td>
</tr>
</tbody>
</table>

As the table shows, the Laing Art Gallery and Sunderland Museum and Art Gallery both have high levels of repeat visiting, with a strong loyal core of enthusiasts who are visiting at least every few months.

Whilst South Shields Museum and Art Gallery and Shipley Art Gallery have less repeat visiting overall, they still have a small core of very frequent attenders. The Discovery Museum and Hancock Museum do not seem to inspire extremely frequent visiting, but still have relatively high proportion of visitors making fairly frequent visits, consistent with their status as family venues. Monkwearmouth Museum has a strong but relatively tiny core of very enthusiastic repeat visitors.

Arbeia Roman Fort and Segedunum have low repeat visiting in 12 months, in line with their role as visitor attractions.

Visiting Tyne and Wear museums

There is a high level of cross-over between venues, with between 52% (Segedunum) and 87% (Monkwearmouth) of respondents at individual Tyne and Wear museums saying they had visited another Tyne and Wear museum in the last 12 months.
3.8 Intentional and incidental visiting

According to norms compiled from surveys with museums and galleries across the UK, on average around 70% of visits are intentional (visitors set out from their home with the intention of visiting the venue) whilst 30% are incidental (visitors drop in whilst passing by). Families and large groups are more likely to make intentional visits as the logistics of the trip need to be carefully planned.

Benchmarking research for Tyne & Wear Museums (Wood Holmes Group 2005a) shows that there is are lower overall levels of intentional visiting to Tyne & Wear museums on average compared to these national norms. This is probably because many of the venues are town centre based, and may form part of a broader day out (shopping or going to other cultural venues) or be somewhere that people pop into as part of their daily routine eg on a lunch break. However, visits to the Hancock (74%), Discovery Museum (71%) and Sedgeunum (64%) were mainly intentional. This is unsurprising given their status as days out venues, especially for families.

Recent futurecasting research suggests that increased time pressure and advances in communication technology have created shortened planning horizons: visitors are deciding to attend leisure attractions later than they were. (nVision 2006c).

3.9 Social class / grade

Class is perhaps the biggest single factor affecting propensity to visit museums and galleries. Those in higher social grades (ABC1) are far more likely to visit museums and galleries than those in lower social grades (C2DE). 53% of people from higher socio-economic groups ABC1 have visited a museum or gallery in the last 12 months, compared to just 29% of those from social grades C2DE (DCMS 2006c).

Visitors to country parks, historic properties and museums / art galleries are broadly of a similar demographic: a strong focus on AB socio-economic group and the 35-44 age groups (Mintel 2006). People in the ‘urban prosperity’ ACORN category are the most likely to visit a local museum or art gallery (Mintel 2006).

As the tables below show, ABs are estimated to make around two in five of all visits to museums and galleries despite accounting for only 24% of the population. DEs represent 28% of the population, but represent around 14% of all visits.
Compared to 1999, it seems that museum and gallery visiting has become increasingly dominated by ABC1s. (It should be noted that during the five years between 1999 and 2004, the proportion of the British population classified as C2 has fallen by two percentage points, whilst ABs have grown by two points).

Despite free entry, there has been less than 1% increase in proportion of visits made by C2DEs to DCMS-sponsored museums since 1998. The proportion hovers around 16% and the percentage of CDEs attending museums is lower than in early 1990s. It seems the free entry schemes have largely increased frequency of visiting from existing visitors rather than facilitating visits from non-traditional audiences.

However, North East museums receive a higher proportion of visits from C2DE visitors than museums nationally (35% compared to 23%). Overall the area receives a higher proportion of PSA2 target visitors (7% compared to the national average of 4%). (Ipsos MORI 2005)

However, Acorn segmentation of the visitors to the Discovery Gallery suggests that postcodes containing large proportions of C2DE residents are still under-represented in the audience. Acorn segmentation for Sunderland Museum and Art Gallery shows that the venue is reasonably successful at attracting C2DE visitors from the local area. (DBA Consulting 2005a and 2005b)

### 3.10 Education

Whilst museum visitors are most likely to have a terminal education age of 19+ (34%), TGI data shows that a significant proportion of visitors in England (23%) finished education at 16. In the North East, this figure rises to 26% (Matty 2004).
3.11 Ethnicity

The number and proportion of black and minority ethnic (BME) people living in the UK is growing. According to the 2001 National Census, just over 9% of the total population of Great Britain are from BME groups, 97% of which live in England (ONS 2001). The Cabinet Office report (2000) on the work of the Social Exclusion Unit and Policy Action Teams state that people from BME backgrounds are at a disproportionate risk of exclusion and one way of tackling this is ensuring that mainstream services meet their needs.

MORI’s omnibus survey for Resource (MORI 2001) suggested that the percentage of museum visitors from minority ethnic backgrounds broadly reflects the UK population:

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>% of UK population</th>
<th>% of visitors to museums</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>92</td>
<td>94</td>
</tr>
<tr>
<td>Asian</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Black – African/ Caribbean</td>
<td>1</td>
<td>*</td>
</tr>
</tbody>
</table>

UK visits to museum by ethnicity (MORI 2001)

Visitors to museums and art events by ethnicity 2002–03 (Matty 2004)

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>% population of England</th>
<th>% attended arts event in last 12 months</th>
<th>% visited museum/ gallery in last 12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>90.9</td>
<td>80</td>
<td>36</td>
</tr>
<tr>
<td>Asian/ British Asian</td>
<td>4.6</td>
<td>77</td>
<td>25</td>
</tr>
<tr>
<td>Black/ Black British</td>
<td>2.3</td>
<td>80</td>
<td>32</td>
</tr>
<tr>
<td>Dual heritage</td>
<td>1.3</td>
<td>91</td>
<td>44</td>
</tr>
<tr>
<td>Chinese</td>
<td>0.9</td>
<td>81</td>
<td>32</td>
</tr>
</tbody>
</table>

However, recent data from DCMS shows that people from Black and minority ethnic backgrounds are less likely to have visited a museum or gallery in the last 12 months than their white counterparts. 36.5% of black and minority respondents had visited, compared to 43.4% of white people. (DCMS 2006c)

1% of visitors to museums and galleries in the North East are from BME backgrounds. This is lower than the national average (6%) but is reflective of the low proportion of BME residents within the local population (Ipsos MORI 2005).

People of mixed ethnicity are most likely to have visited a museum or gallery in the last 12 months. Amongst the Asian/ British Asian group, those identifying themselves as Indian are more likely to have attended in the last
year (27%) than the Pakistani and Bangladeshi sample (21%) (Bridgwood et al, 2003b).

By comparison, levels of engagement with and support for the arts were high across all ethnic groups. Support for public funding of the arts was highest among Black/Black British people (90%) and lowest among white respondents (74%) (Bridgwood et al, 2003b).
4 Why do people visit museums?

4.1 Reasons to make a visit

Of those who attended a museum or gallery at least once during the past 12 months, 'general interest in the subject of the museum / collection' was the most frequently cited reason for attendance (43%) followed by 'to see an exhibition / display' (40%). The main reason was 'to see an exhibition / display' (31%) closely followed by 'general interest' (29%) (DCMS 2006b).

The top reasons given for visiting North East museums and galleries are 'wanting to take the children' or 'children asking to go'. This reflects the high proportion of family parties visiting the venues (Ipsos MORI 2005). Whilst the below comparison chart could indicate a lack of awareness about the museums and what's on, it could just be that there is a stronger tradition of taking children to museums in the North East compared to the rest of the UK.

**Main reasons for visiting museum or gallery**

<table>
<thead>
<tr>
<th>Reason</th>
<th>North East</th>
<th>National 2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>I wanted to take the children</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Children wanted to come</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Been before and wanted to come again</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>On holiday in the area and decided to visit</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Had some spare time and decided to visit</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>General interest in the subject of the museum/collection</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>Just passing/passing by and decided to visit</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>To visit a specific event at the museum/gallery</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>The subject of a temporary exhibition interested me</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>To use the museum/gallery facilities</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>To meet a friend/friends</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>To find information to support my studies/research</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>No particular reason</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: All visitors, Hub (2189), National (16,173)

(Ipsos MORI 2005)
4.2 Motivations for visiting

Whatever the reasons for visiting are, these are symptomatic of deeper underlying drivers for making a visit – visitors have made a visit because they believe the organisation can meet their needs.

Based on extensive research, Morris Hargreaves McIntyre has identified and quantified the range of motivations that people have for visiting museums and galleries. This model is a useful way of segmenting visitors by their principal motivation, i.e. by the needs they are satisfying by visiting.

The motives listed in this hierarchy have been painstakingly defined from dozens of focus groups in which visitors reported, articulated and discussed the benefits they were seeking from a visit to a museum or gallery.

The classifications have then been grouped into four key drivers: Social, Intellectual, Emotional and Spiritual.

Hierarchy of motivations

<table>
<thead>
<tr>
<th>See museum as a...</th>
<th>Have this driver...</th>
<th>And they seek this from a visit...</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHURCH</td>
<td>SPIRITUAL</td>
<td>Creative stimulation and quiet contemplation, they see museums as an opportunity to escape and recharge their batteries, food for the soul</td>
</tr>
<tr>
<td>SPA</td>
<td>EMOTIONAL</td>
<td>May have a personal connection to the subject matter, want to see fascinating objects in an inspiring setting, seek ambience, deep sensory and intellectual experience</td>
</tr>
<tr>
<td>ARCHIVE</td>
<td>INTELLECTUAL</td>
<td>Keen to encourage their children's or their own interest and knowledge, may have professional interest in the subject, seek a journey of discovery, to find out new things</td>
</tr>
<tr>
<td>ATTRACTION</td>
<td>SOCIAL</td>
<td>See museums as an enjoyable place to spend time with friends and family, seek ease of access and orientation, good facilities and services, welcoming staff</td>
</tr>
</tbody>
</table>

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These drivers are hierarchical. In moving up the hierarchy visitors experience increasing levels of engagement with the museum or gallery and the objects on display. The further up the hierarchy visitors move, the more fulfilling and rewarding their visit. At each point on the hierarchy visitors have different needs; they are only able to move up the hierarchy if their needs at the lower ends are met.

The model has striking parallels with Maslow’s hierarchy of human needs (Maslow 1943). We have therefore mapped Maslow’s categories onto our hierarchy to show how the two models relate to each other. The model also shows how these fit with the policy context in which museums engage visitors.
## Policies, objectives and needs matrix

<table>
<thead>
<tr>
<th>Government/ MLA policy</th>
<th>Museum objectives</th>
<th>Visitors’ needs / motives</th>
<th>Engagement with the collection</th>
<th>Maslow’s Hierarchy of human needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture as an indicator of civilisation</td>
<td>Immersion in collection</td>
<td>Escapism</td>
<td>Spiritual</td>
<td>Self actualisation</td>
</tr>
<tr>
<td></td>
<td>Public inspiration</td>
<td>Contemplation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stimulate activity</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Intimacy with collection</td>
<td>Aesthetic pleasure</td>
<td>Emotional</td>
<td>Aesthetic</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Awe and wonder</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Moving</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Collect and conserve</td>
<td>Emotional</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Personal relevance</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Experience the past</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nostalgia</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Academic advancement</td>
<td>Intellectual</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Research facility</td>
<td>Academic interest</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Public education</td>
<td>Hobby interest</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Self-improvement</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Economic development</td>
<td>Children’s education</td>
<td>Stimulation</td>
<td>Social</td>
</tr>
<tr>
<td></td>
<td>Public enjoyment</td>
<td>Stimulate children</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Social interaction</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Equal access to culture</td>
<td>Public attraction</td>
<td>To see, to do</td>
<td>Social</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Combat social problems</td>
<td>Public responsibility</td>
<td>Inclusion, welcome</td>
<td>Social</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public space</td>
<td>Access, comfort, warmth, welcome</td>
<td>Safety Physiology</td>
</tr>
</tbody>
</table>

### Morris Hargreaves McIntyre motivation norms

We have undertaken sophisticated quantitative analysis at over fifty museums and galleries including The British Museum; V&A; National Gallery; Royal Academy; Tate Modern; Tate Britain; National Portrait Gallery; Ironbridge; and National Galleries of Scotland to generate norms for visitor main motivation. The left hand column shows visitors’ main motivations for visiting museums while the right hand column shows their main motivations for visiting art galleries.
As the pillars illustrate, 48% of all museum visits are driven by a Social motivation, for art galleries, this is only true 30% of visits. For both museums and galleries, just over a third of visits are driven by Intellectual motives. It is at the top end of the Hierarchy that galleries achieve deeper engagement, 3% of museum visits are driven by Spiritual motives such as escapism, contemplation or creativity. In art galleries this driver is five times higher at 15%.

**Using knowledge of visitor motivations to encourage visits**

The new marketing approach is to build a brand not a product—to sell a lifestyle or a personality, to appeal to emotions. But this requires a far greater understanding of human psychology. It is a much harder task than describing the virtues of a product.

Museums and galleries need to consider the needs of groups of people with a range of different motivations for visiting. Qualitative and quantitative research undertaken by Morris Hargreaves McIntyre has consistently found that families are most likely to be motivated to visit museums and galleries by social or intellectual drivers. Their specific visiting needs must be considered...
alongside the needs of academics, tourists and those looking for escape and relaxation, for example.

The following case studies show arts organisations understanding the potential for visitors to have a socially-motivated visit, and adjusting their offer accordingly. They also take account of where a visit fits within visitors' lives (eg time pressure, working day) and offer benefits equivalent to competing free time activities (eg visiting a bar with friends).

**Pre-concert receptions, US symphony orchestras**

Many orchestras in the US offer pre-concert cocktail receptions in connection with concerns programmed for new attenders. The Baltimore Symphony offers a 'Symphony with a Twist' series, with martini bars and jazz in the lobby before concerts with popular appeal.

Now discontinued, the Pittsburgh Symphony ran the 'Symphony with a Splash' series. Each performance started with a cocktail hour, giving the target audience – students and young professionals – a chance to unwind. The concerts included popular classical pieces accessible to new audiences, and the history of each piece was discussed by the conductor, using multimedia presentations and even audience participation. The programme was designed to encourage younger audiences by reducing the risks perceived by these groups – the formalities of going to a normal performance, lacking knowledge of the music, struggling with 'difficult' pieces.

'It was a really fun & educational night at the symphony and a great way to keep downtown vibrant after working hours. Even my sister, a music teacher, thoroughly enjoyed the shows.' (Audience member, from Pittsburgh Symphony messageboard, www.pittsburghsymphony.org)

(Brown 2004)

**Love Art Later**

This scheme was a partnership between nine London galleries (Courtauld Institute, Hayward Gallery, National Gallery, National Portrait Gallery, Royal Academy, Tate Britain, Tate Modern, V&A, Whitechapel Gallery), working together to raise awareness of their offer through a series of late night openings. The scheme aimed to raise awareness of galleries as social spaces, attract a wider audience and increase visitor numbers to evening events.

A joint publicity campaign promoted the evening opening times and sponsored bar nights at each gallery, enhanced by a sponsored media campaign in partnership with Time Out. 66,000 leaflets were distributed around bars, cafes and clubs in London.
All partners in the campaign reported higher than average attendance at their late openings, with National Portrait Gallery achieving a record attendance of 800 at their bar night – double the normal evening opening level.

67% of attenders said that the convenient timing appealed to them, with 35% saying it was the most important factor in deciding to visit. Over 25% of evening opening attenders were making their first visit to that venue, and 56% thought evening opening would encourage them to try new galleries. Almost a third of evening visitors were ages 25 to 34 – considerably higher than the proportion of daytime visitors (20%).

Evaluation showed that the events appealed to busy professionals who worked in the centre of town and tended not to come back in during the weekend. For these people, late opening helped to extend the day, link with other leisure opportunities and slot in a ‘culture fix’ without compromising other leisure time commitments. Younger people were attracted to the events as new and novel social events – as well as providing a social meeting place away from traditional bar environments, the events were seen as something special and a good way to experience art (or introduce friends to art) in a more relaxed environment than a daytime visit. Evening events also appealed to highly motivated regular gallery attenders, who relished the opportunity for quiet contemplation and less crowded gallery environments. (Morris Hargreaves McIntyre 2002, Johnson 2004)

Late at Tate Britain

Tate Britain lost many of its younger visitors with the arrival of Tate Modern – Tate Britain now seemed stuffy and boring in comparison. ‘Late at Tate Britain’ aimed to attract a younger audience to the gallery and bring in the local community and local businesses.

On the first Friday of every month, people were invited to the gallery in the evening – the only time the gallery is open after 6 pm. Access to the galleries is supplemented with a bar and live music, with half price tickets to paid-for exhibitions. Often the events are sponsored.

With an initial budget of just £150 to attract people to the events, the marketing department has used flyers (mainly given out in local cafes, bars, given to community groups and businesses) and one tiny advert in time out. In the first two years, a regular visitor base of 3,000 people was built, 80% of whom were new visitors to Tate Britain. The events have also helped to shift the negative brand perceptions amongst this group. (Gompertz 2004)
The following case studies demonstrate arts organisations' understanding of visitors with emotional and spiritual motivations. The organisation has used these higher potential benefits as the key message of their marketing campaign, appealing to lapsed or potential visitors with these motivations.

**Ascension, Graves Art Gallery, Sheffield**

The Ascension campaign was conceived to halt the downward trend in visitor figures at the Graves Art Gallery in Sheffield. The opening of the Millennium Galleries next door in 2001 caused displacement of visitors, with previously loyal Graves visitors switching to the newer, more accessible sister gallery in lieu of visiting the Graves.

Ascension was divided into two phases both aimed at raising awareness of the Graves Art Gallery without a change to the exhibition programme which was already planned for the next 18 months. The campaign was entirely brand driven, aimed at the traditional Graves audience who had recently defected.

Phase one created the 'Rise above the city' campaign: new signage and an outdoor campaign which concentrated on the distinct benefits of a visit to the Graves Art Gallery. The posters emphasised the gallery as a place to think and relax amidst the busy city centre.

The second phase aimed to create a revived energy around the Art Deco Graves building by using French painting to make connections with Paris as the city of romance. The gallery ran a competition which required entrants to inspect and answer questions on a work on show in the gallery. This encouraged hundreds of first time visitors to the Graves.

Research carried out during the campaign (Morris Hargreaves McIntyre 2006c) validated the approach for Ascension. The investigations into brand perceptions and relationship between the two galleries confirmed that the issue was displacement – people were now visiting Millennium Galleries for their art fix rather than the Graves, simply because it was far easier to access. The research also identified that visitors to the Graves are highly motivated, with over a third of visitors coming specifically for emotional or spiritual reasons – to be moved, to escape from daily life, for time out and inspiration – exactly the sorts of motivators that the Ascension campaign appealed to.

The campaign led to an immediate jump in visitor numbers, creating the first year on year increase at the gallery in four years and a further 25% increase in visitors this year. The awareness created by the campaign has created a strong legacy, with numbers remaining consistently strong.
4.3 The audience pyramid

Segmenting the market by whether people attend or not is perhaps simplistic. Within current attenders there are clearly core attenders who attend frequently and more occasional attenders who attend less often, often only once a year or less. Similarly not all non-attenders are hostile to the idea of attending museums.

In selecting a leisure time activity, the decision to visit a museum or gallery is dependent upon the level of belief in the ability of these organisations to meet their needs. Many non-visitors choose not to attend museums and galleries because they do not believe that they will meet their specific needs.

The Audience pyramid model below segments the market into a hierarchy of intention or motivation to engage with any cultural activity, in this case, museums and galleries. The individual segments in the model reflect different levels of belief in the ability of museums and galleries to meet their needs.

**Attenders** represent those who are currently in the market – they already attend and as such know that museums and galleries can meet their needs. These are typically a smaller number of people who account for a large number of current visits. These people attend with varying frequency as described above.

**Intenders** are those who already want to attend, but are waiting for the opportunity. These people too therefore believe that museums and galleries
can and will meet their needs. For these people there may be some barriers but they are ones that can be relatively easily addressed.

**Open to persuasion** are people who might be described as not hostile to the proposition of attending. However they are not necessarily convinced that visiting a museum or gallery will meet their needs and as such will require active persuasion that a visit will do so.

**Resistors** are sceptical that a visit to a museum or gallery could meet their needs. This can be due to a lack of understanding of their own needs; to negative preconceptions, which may or may not be accurate, and can also be due to their recollections of previous, unsatisfactory visits often in organised schools groups. This segment is more likely to respond to outreach initiatives or being persuaded to attend as a member of party; they are unlikely to be proactive visitors.

**Rejectors** are actively hostile to the notion of engaging with museums and galleries – they are convinced it is not for them.

Attenders know through experience that a visit to a museum or gallery will meet their needs. Understanding attitudes towards museums of the other segments of the audience pyramid is essential in developing and broadening audiences for a venue. While attenders may respond well to traditional marketing initiatives, other segments of the audience pyramid will need alternative strategies if that are to be convinced that a visit will fulfil their needs.

### 4.4 Risk

The Henley Centre (2000a) identify risk as a major factor in the choice to consume cultural products. Participation in the arts involves risk – money, time, emotional, intellectual and social confidence and control are all factors which audiences gamble on a promised experience. Furthermore, forecasts predict that sensitivity to risk is likely to grow, and is already a key barrier to engagement with the arts.

Morris Hargreaves McIntyre have segmented the market of different arts organisations according to their attitude to risk. There are three broad segments common to all arts audiences, which we have also created norms for based on extensive surveying at various venues. We established visitors’ willingness to take risks when visiting an art gallery, according to three categories:
<table>
<thead>
<tr>
<th>Risk level</th>
<th>Segment</th>
<th>Segment description</th>
<th>% museum visitors</th>
<th>% gallery visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Risk taker</td>
<td>Confident, open-minded opinion formers. Willing to visit an exhibition showing unknown or lesser known work or themes.</td>
<td>27%</td>
<td>44%</td>
</tr>
<tr>
<td>Medium</td>
<td>Cautious gambler</td>
<td>Early majority who require endorsement but are open minded. Willing to visit an exhibition showing work by artists that they have not heard of or seen before / unfamiliar subjects, but have been recommended / reviewed.</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Low</td>
<td>Safety first</td>
<td>Conservative and risk averse. Willing to visit an exhibition showing work by artists who are familiar names / familiar subjects and have been convincingly and consistently reviewed.</td>
<td>29%</td>
<td>21%</td>
</tr>
</tbody>
</table>

As shown, there are significant differences between gallery and museum visitors in terms of risk. Current gallery audiences are considerably more open to risk than current museum audiences.

The Henley Centre (2000a) recommends the following approaches in helping potential visitors to manage risk:

- Building cultural (self) confidence by providing varied entry levels and transitional guides to the arts.
- Using brands to develop relationships with visitors above and beyond functional values. If visitors trust the brand, the brand can then act as the guarantor for the risks taken. Brands also give visitors an idea of what to expect, reassure visitors and enable organisations to build emotional equity with their customers.

The example below shows organisations creating a brand under which visitors were able to build their confidence in a low risk environment, and offer guidance to deepen their engagement.

**Gallery GO scheme, Hampshire visual arts organisations**

Between 1999 and 2000, six Hampshire-based contemporary visual art galleries (ArtSway, Aspex, John Hansard Gallery, Southampton City Art Gallery and Winchester Gallery) worked with Arts Marketing Hampshire (AMH), to develop the general non-specialist audience for contemporary visual art in the area. The project aimed to introduce new audiences to contemporary visual arts and also make the experience of those currently attending gallery exhibitions more enjoyable.
The group used MOSAIC and Prospect Locator to identify households likely to be in the potential market for contemporary visual art. This was also based on response rates from a pilot phase using AMH’s list of existing arts attenders. 58,921 individuals were identified, and then invited to one of 51 events.

These events were developed specifically for the Gallery GO project, and grouped into three categories: introductory talks and tours; in depth gallery talks; and critical circle debates.

Initially everyone got an invite to an introductory level event. The invitation made it clear that this was an opportunity to see work when the gallery is normally closed and included the option to bring a guest. Those who responded were then sent a greetings pack, including leaflets explaining contemporary art and an exhibition guide. Qualitative feedback showed that the opportunity to socialise in the gallery and the chance for informal learning. Those that attended an introductory event were then also included on the lists for more challenging events.

Altogether, 2,232 visits were made to the events. Attendees at events were greeted by museum staff, given the opportunity to look at the exhibition (with staff on hand to answer questions) and offered refreshments. The official events – the talks – were kept to a maximum of 45 minutes. Attendees were then able to stay afterwards to look at the exhibition again.

Gallery GO brought contemporary art novices closer to understanding their own prejudices about the subject and satisfy their curiosity – and perhaps most significantly, given these visitors the confidence to visit by reducing perceived risks. People with some understanding of contemporary art used the scheme to engage deeper and escape daily life. People with a lot of prior knowledge used the scheme to understand art in relation to themselves and the wider environment.

24% of participants visited exhibitions other than Gallery GO for the first time after the scheme, and the level of people saying they were ‘very’ or ‘fairly confident’ increased from 52% to 76%.

The following example is a case study in removing risk elements to encourage intender potential visitors to start a relationship with the organisation.

**Test Drive, various venues**

There are six million empty theatre seats each year that if sold would be worth over £80 million, but unsold are worth nothing. Test Drive uses this resource of spare capacity to persuade potential attenders that a visit will meet their
People who are open to the offer but have just never been are given free tickets for empty seats, costing a small amount from the marketing budget and nothing from the box office. These new customers’ activities are closely monitored via box office data following the free tickets, with impressive results: 30 to 35% make return visits paying full price; over a quarter of people are retained as customers, with many more saying that they intend to return in the future; and most schemes make a profit in the first year.

In 1998/9, Arts About Manchester coordinated Test Drive: North West with 40 participating venues across the region. 54,000 were contacted with offers, with 20,056 potential attenders persuaded to try an unfamiliar art form. 76% of participants subsequently recommended the experience to friends, colleagues and family, 71% said it had made them more likely to attend and 32% had reattended within 12 months of their visit. This project proved Test Drive as an effective route to attracting people who have a latent interest in the arts. (Johnson 2004)

Although originally devised to attract the most likely potential attenders, Test Drive has been used successfully to attract socially-excluded rural audiences (at Buxton Opera House) and to reattract lapsed visitors. (Morris Hargreaves McIntyre and Dunnett 2004)

4.5 How and why people participate in the arts

The following model (Walker et al 2002) outlines a theory of cultural participation which considers both person-specific factors influencing individual choice and features of the environment that affect the choices of individuals.
How and why people participate in the arts: a conceptual model

Motivations: why people seek enjoyment in the arts, why they attach importance to attending and why they choose to participate. Eight motivations were identified: celebrate heritage; support community; cultural interest – want to learn something about another time or culture, want to learn more about a particular artform, want to experience high quality art; social and religious commitment – want to support someone involved, want to participate for religious reasons, want to get together with friends and family.

Resource: time, money, skills – including awareness of opportunities, existing knowledge of the art form and other contextual knowledge, and knowledge of the range of possible responses to cultural experiences.

Paths to engagement: how individuals become engaged with the arts – through personal relationships including family or social ties, through business or educational relationships, other social networks and direct marketing.

Structure of opportunity: availability of events that match the interests of potential attenders and are seen as accessible.
Methods of participation: whether and how often people attend and participate, and how – attending, volunteering, performing.

Types of activity: what people choose to attend.

Venues: locations where individuals choose to attend.

A survey of cultural participation in the US (Walker et al 2002) based on these factors revealed the following results:

- Frequent participants in arts and culture also tend to be active in civic, religious and political activities – this is true of every income level.
- Early socialisation experiences (eg going to art galleries as a child) make a difference in the cultural participation of adults, regardless of income and education.
- Most people who participate in the arts and culture are involved in activities that span ‘classical’ and ‘popular’ art forms, and span many genres. This is especially true of very active attenders.
- People are more likely to attend cultural events at community locations than specialised arts venues. This is especially the case for people who only take part in ‘popular’ art forms, meaning that ‘classical’ organisations can reach more people by taking their work to non-traditional venues.
- People’s motivations for participation in arts and culture suggest that there is a strong link with other aspects of community life. Personal motives more often reflect social and community purposes rather than a deep personal need or interest in the experiences themselves and membership in non-arts organisations is an important path to engagement with the arts for many attenders. Eg 63% of respondents said ‘to get together with friends or family for social reasons’ was a reason for attending, with 47% saying ‘to support a family member or friend’ and 44% saying ‘to support organisations or events that are important to my community’. However, these socially motivated visitors are more likely to be limited in both the number and range of cultural events.

4.6 The family audience

Potential family attenders at museums and galleries are likely to be segmented along the same criteria as general museum and gallery visitors, ranging from core attenders who are clearly committed to the concept and believe it will meet their needs, through people who might be described as open to persuasion and finally those who resist or reject the concept and are therefore less likely to attend.
Each of the segments will have different motivations for attending. Research that we have undertaken into current and potential family visitors has found that families are most likely to be motivated to visit museums and galleries by social or intellectual drivers.

Past research by Morris Hargreaves McIntyre has revealed that children are classic intenders, having had their appetite whetted through school visits to museums. They generally have positive views of museums and believe that they offer the opportunity for both learning and an enjoyable social experience. Whilst their experience of art galleries is more limited, many perceive that galleries could provide a similar experience to museums. They want to attend museums and galleries but are reliant on their parents or carers to provide them with the opportunity to visit.

Parents are open to persuasion in their attitudes towards museum and gallery visiting. They are not hostile to the idea of visiting museums and galleries, but would require active persuasion to convince them that a visit to a local venue will meet their needs. In selecting family leisure time activities, parents put their children first and are generally happy to consider anything that they think their children will enjoy. They are driven by a strong Social motivation; spending quality time together as a family and taking part in activities are important criteria for an enjoyable family outing. Parents also have Intellectual motivations and feel that museums have an educative role and provide learning for children.

Parents' main concern about visiting art galleries with their children is their own lack of understanding of art. This is a real issue for them, as they fear that they cannot make a visit to an art gallery an enjoyable experience for their children and worry that they will feel inadequate and humiliated in front of their children. They need reassurance that a visit will be facilitated for both parents and children.

For example, research with parent visitors to the Discovery Gallery (Cultural Management Research 2002) revealed that parents visit the venues primarily because it is both entertaining and educational for their children. They appreciate the diversity of the galleries both because it satisfies their own personal interests and also because this range of subject matter is appropriate for older children. Family visits will often therefore consist of a general look around the galleries, compared to visits made by frequent adult visitors who will normally focus their visit on one or two galleries, either due to time pressures or because they have a specialist or hobby interest in the subject.
Hierarchy of family needs

The family unit is governed by a number of factors. They may have time on their hands but their budget dictates what they can do as a family, transport may also be a consideration. The needs of families are diverse, from the babies in pushchairs, to grandparents with mobility problems, to self-conscious teenagers. In deciding whether to visit a museum or gallery as a family, they will ask themselves a series of questions to determine whether a visit will fulfil all of their needs. These considerations are hierarchical: a visit will only occur if the venue is perceived as able to fulfil each of the levels on the hierarchy.

Hierarchy of family needs

1 The family unit
   Are we looking for a family activity?
   Dependent on a functional family unit, having time on their hands and looking to go out together as a family

2 Paid or free
   Is the museum / gallery / attraction paid or free?
   Budget concerns: how far is it to travel – will it be worth the journey in terms of time and money?
   Familiarity with location and venue – will it be worth the cost of entry and travel?

3 Meet all our needs
   Will it meet all of our needs?
The needs of the family unit can be incredibly diverse: the family unit may be made up of grandparents, single parents, one or more children, different age ranges

4 Value for money

*Will it offer value for money?*
Duration of visit – full or half day, quality of service, quality of product, value-added

5 Fun and enjoyment

*Will it provide fun and enjoyment?*
Strong play element, interactivity, sensational or thrill element

6 Educational value

*Will the visit offer any educational value?*
Learning while playing, educational for parents and children

7 Feeling good

*Will the experience make the family feel good?*
Quality of presentation, high quality customer care, friendly, welcoming, ease of orientation

8 To suit me

*Will the museum/attraction suit the family – self image?*
Reward / fulfilment for main decision maker, incentives to return, strong brand identity, easy to communicate message to others

Meeting the needs of families

We have shown that people will only be motivated to visit museums if they perceive that these institutions will meet their specific needs.

The findings and implications can be grouped by what is known as the ‘Marketing Mix’. These are the factors, controlled by organisations themselves, which can influence the decision to visit by offering benefits that meet the needs of the market segment. In developing new family audiences it is necessary to review the whole marketing mix and to establish what are perceived as benefits to families.

The Benefits matching model below illustrates the process of matching the benefits sought by families to the benefits offered by the museum and how those matched benefits are communicated.
The table below demonstrates how this works in practice for museums and galleries.
### Audience knowledge digest

<table>
<thead>
<tr>
<th>Benefits sought</th>
<th>Description</th>
<th>Benefits offered</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Function</strong></td>
<td>Range and features of the actual products and services being offered</td>
<td><strong>Product</strong></td>
</tr>
<tr>
<td>Eg Families like to go for days out to outdoor activities where children run off energy</td>
<td><strong>Product</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Added value</strong></td>
<td>Aspects of the service which enhance the visitor experience</td>
<td><strong>Process</strong></td>
</tr>
<tr>
<td>Eg Children like first person interpretation</td>
<td><strong>Process</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Value for money</strong></td>
<td>The actual cost of entry or use; cost of additional services</td>
<td><strong>Price</strong></td>
</tr>
<tr>
<td>Eg Value for money based on a whole day out.</td>
<td><strong>Price</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Service</strong></td>
<td>The staff involved in delivering or interpreting the product for the users. Quality of services and customer care is central to the user’s experience.</td>
<td><strong>People</strong></td>
</tr>
<tr>
<td>Eg Culturally aware and sensitive staff</td>
<td><strong>People</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Availability</strong></td>
<td>How and when the products and services are made available</td>
<td><strong>Place</strong></td>
</tr>
<tr>
<td>Eg Older geographically excluded people need to be able to get to the museums</td>
<td><strong>Place</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Self image</strong></td>
<td>The extent to which an individual feels a services fits with their own self-image</td>
<td><strong>Branding</strong></td>
</tr>
<tr>
<td>Eg young people interested in contemporary cultural and lively experiences</td>
<td><strong>Branding</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Acceptable risk</strong></td>
<td>The assurance needed by the visitor that the experience will meet their needs and expectations</td>
<td><strong>Guarantees</strong></td>
</tr>
<tr>
<td>Eg A repeat visit has to be worth it by offering something different to previous visits</td>
<td><strong>Guarantees</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Awareness and perceptions</strong></td>
<td>Perception of the activity or institution by the market. Awareness and knowledge of the organisation and communication methods.</td>
<td><strong>Positioning and promotion</strong></td>
</tr>
<tr>
<td>Eg For young people a good museum is often not thought of as a museum – it becomes an attraction</td>
<td><strong>Positioning and promotion</strong></td>
<td></td>
</tr>
</tbody>
</table>

Arts Council England’s New Audiences programme (1998 to 2003) drew the following conclusions on developing family audiences for the arts:

- For organisations to adopt a family friendly approach, they must first create a safe environment with facilities that cater for family groups, a warm welcome, accurate information for visit planning, activities and events that will appeal to all ages within a family group and represent value for money.
- Additional financial resources are not always necessary – relatively minor changes can make a big difference. For example, customer care can make a huge difference for families, as can pricing which takes into account a realistic definition of what constitutes a ‘family’ ticket.
Family forums and advisory groups can help organisations develop family focus and develop longer term relationships with this market. (Johnson 2004)

**Chicken Run, National Museums Liverpool**

Since 2004, national Museums Liverpool have been running an Easter trail across all venues.

The trail is designed to encourage family visitors to visit different National Museums Liverpool sites, with a number of subsidiary aims (encouraging return visiting, encouraging visits to less well known venues including the Conservation Centre, developing ongoing relationships with families by encouraging them to join NML free mailing list).

The 2005 trail was called ‘Rooster Run’ themed around Chinese Culture and the Year of the Rooster. Participants followed the Rooster Run trail around National Museums Liverpool’s venues over the Easter holiday to find the answers to simple questions on the theme. Cards were marked by staff at the information desk, with children receiving a stamp for each correct question – completed cards were then exchanged for rewards at each venue. The more stamps collected, the bigger the prize received meaning that children were driven to visit as many venues as possible to maximise their winnings. Children with two or more stamps were also entered into a prize draw to encourage multiple venue visiting.

The trails have been a huge success. In 2005, 10,242 visitors visited more than one venue as part of the trail, with 5,121 children receiving prizes. Only 250 children entered the prize draw – a drop from the previous year, which may indicate participants were satisfied with their prizes on the day and / or intended to complete their trail at a later date in the holidays.

The number of visits made to between five and eight venues also far exceeded staff expectations – 2,168 visitors on the trail visited more than five sites, with 158 visitors going to all eight sites. Roughly half the visitors made a visit to the Conservation for the first time whilst on the trail. 400 people came to the Rooster Run party as a result of the invitations given out on the trail.

50% of participants to Rooster Run described the event as ‘fantastic’, with a further 40% describing it as a ‘great’ experience. 99% said they would revisit the National museums Liverpool venues they had been to, with 99% also saying they would like to take part in a similar event next year. 162 parents joined the National Museums Liverpool free mailing list.

The scheme costs £9,000 – 87 pence per visitor. The project used sponsorship and partners very effectively to provide the gifts and publicity: The Divine
Chocolate Company supplied fair trade chocolate for over 1,500 people (worth £1,500 in kind); Reeves Art Materials supplied 100 free paint sets and 300 paint sets at £1 (worth £2,000); a local art retailer provided 100 paint brushes and displayed Rooster Run point of sale material; and Liverpool Families Magazine supplied a free insert for 3,000 of the Rooster Run trail cards and editorial.

Evaluation was built in to the project – an evaluation questionnaire was filled out by families prior to receiving a prize, with 166 forms completed.

### Prize structure and uptake

<table>
<thead>
<tr>
<th>No of venues visited</th>
<th>Prizes</th>
<th>No of child visits</th>
<th>Total visits (inc accompanying adult)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Bookmark</td>
<td>2254</td>
<td>4508</td>
</tr>
<tr>
<td>3</td>
<td>Chocolate and poster</td>
<td>1173</td>
<td>2346</td>
</tr>
<tr>
<td>4</td>
<td>Frisbee</td>
<td>610</td>
<td>1120</td>
</tr>
<tr>
<td>5</td>
<td>Mug filled with eggs</td>
<td>436</td>
<td>872</td>
</tr>
<tr>
<td>6</td>
<td>Pump bag</td>
<td>346</td>
<td>692</td>
</tr>
<tr>
<td>7</td>
<td>Painting set</td>
<td>223</td>
<td>446</td>
</tr>
<tr>
<td>8</td>
<td>Party invitation</td>
<td>79</td>
<td>158</td>
</tr>
<tr>
<td><strong>Grand total</strong></td>
<td></td>
<td></td>
<td><strong>10242</strong></td>
</tr>
</tbody>
</table>

### Family Fun campaign 2005, West Midlands Hub

This campaign aimed to increase the number of visitors to the hub museums (especially from non-traditional audiences).

The campaign started at the end of July and ran until the end of August 2005. Activities included: TV advertising on Carlton West; local newspaper advertising; door-to-door leaflet drops to 750,000 C2DE households across the Midlands; distribution of leaflets to Tourist Information Centres; banner advertising on certain websites; emails to contacts on database and; 4,000 posters distributed to schools and community centres.

The publicity gave some details of what Hub can offer to family visitors and was designed to direct the audience to a leaflet line number and to the website.
The campaign reached an impressive 660,000 family members living in 172,000 households, half via television - that's three in every ten families in the region. TV advertising was the most successful at reaching C2DE families.

The campaign directly prompted 39,000 visits. Of the 660,000 families who saw any publicity, 359,000 (54%) were now more likely to visit in the future. This represents a major short-term success.

Whilst more ABC1 families had seen the publicity, the impact was greater amongst the C2DE families reached by the campaign, with two-thirds increasing their propensity to visit, compared to half of ABC1 families. This may be relative to their existing awareness and knowledge.

Similarly, propensity increased by a third amongst those already making family visits; by half amongst those already visiting but without children; and by two thirds amongst non-visitors. The less their experience, the greater the impact. (Morris Hargreaves McIntyre 2005b, BJL Group 2005)

**Barbican Beacon, The Barbican Centre**

This scheme aimed to develop a family programme to build relationships with families across London, and to target families in Tower Hamlets through a partnership scheme with five schools in the area.

The scheme offered children and their families performances and events, including two festivals marketed through schools and encouraging families to take part in activities together, including workshops and education events.

After an initial research stage to understand the needs of families, the Barbican ran staff training across the organisation to encourage family friendliness. This included customer care training, marketing to families and copywriting for families training and expansion of the education assistants programme. This resulted in a toolkit of materials to communicate with families, including an overall identity, redesign of the children’s leaflet and a new piece of print dedicated to the family programme.

The programme developed a database of 7,000 family contacts, increased repeat attendance and produced significant rises in the number of family tickets sold and attendance at the Family Film Club, as well as the first ever sell-out family festival. More significantly, the project created a cultural shift across the organisation, integrating a family-orientated approach across centre activities. (Johnson 2004)
Family Friendly, Arts About Manchester

Arts About Manchester's Family Friendly collaborative campaigns have been running successfully since 1997. A 3 year collaboration with venues, marketers, curators and artists to look at what could be done to better meet the needs of families resulted in an increase of families visiting the arts across Greater Manchester from 3.6% of the attending market to 25%.

The following principles were developed by Arts About Manchester with its Family Friendly steering group to act as a prompt for organisations to consider the validity of families as a target audience. They are not intended as a checklist:

The whole experience is hugely important to the family visitor than to others: an unhappy child will result in an early exit, perhaps never to return. Providing for families, therefore, has to be approached holistically. The implications for the following elements in your organisation have to be considered: comfort, orientation, interpretation, layout, atmosphere and feedback.

Social interaction for the family plays a critical role in shaping the visit. Family members bring their own personal and social agendas to bear, even more than other visitors. Discussions between family members generated for example by looking at exhibitions and reading interpretation is an important part of the experience. Family Friendly venues should actively encourage this as conversations can be pivotal in finding a shared meaning in an exhibition and adults often need help in starting these conversations.

Physical interaction, particularly by touching, is important for children. If somewhere appears to be a fragile environment or hostile to the idea of interaction, parents will be reluctant to risk a visit.

Provision cannot be based on a narrow age band. Although most children of family visitors are 6-11 years, under 5s and 11-16s form significant minorities in the family unit.

Commitment to families has to run throughout the organisation. This should begin with invigilation/front of house staff’s acceptance of and involvement with family audiences, and run through to an empathy requested by visiting curators, programmers and artists. Commitment has also to be demonstrated by making provision available throughout the year, not simply at holiday times. (Johnson 2004)
4.7 The role of temporary exhibitions

How many visitors visit temporary exhibitions?

From recent research with national museums and galleries we know:

- At a major national museum: around 10% of visitors to the museum during the year went to a paid temporary exhibition.
- At a major national gallery: 25% of visitors to the gallery during a recent blockbuster exhibition paid to visit the temporary exhibition.
- At a major national museum: a survey of visitors subscribed to the museum’s mailing list reveals that 85% of these committed attenders have been to one or more paid temporary exhibitions at other London venues in the past two years.

We can therefore roughly estimate that on average between 10% and 25% of visits during a year will include a visit to a paid temporary exhibition.

However, there will be distinct segments within the total exhibitions market, from a core of dedicated temporary exhibition visitors to general museum visitors who might be persuaded to pay for a widely endorsed blockbuster.

Visitors decide whether to pay for an exhibition based on whether they perceive the exhibition will match their needs from a visit.

A temporary paid exhibition is therefore fishing to attract visitors from the different segments of the total market. The model below shows the market for London exhibitions (as an example), with the proportions of the audience with different motivations in different colours. The central circle indicates the small, core audience for temporary paid art exhibitions.

*Market for art exhibitions in London*
What types of exhibitions encourage people to visit?

To attract the highest number of visitors, an exhibition would ideally satisfy the needs of all motivations. However, the market for an exhibition will depend on which types of visitors the content can satisfy. Temporary exhibitions are therefore fishing in the pool of the total market. Different types of exhibitions – and the marketing campaigns they use to attract potential visitors – will catch different segments of visitors.

Besides overall motivation, many other factors effect whether visitors will attend an exhibition. For example: how specialist the focus of the exhibition is; the inclusion of household name-artists; status as a ‘must see’ exhibition; contemporary relevance of the subject – tied into a season or current climate; popularity of venue.

Themes and titles research, V&A

Recent research conducted by Morris Hargreaves McIntyre for the V&A (Morris Hargreaves McIntyre 2006d) tested the relative appeal of five proposed exhibitions on the V&A’s core audience (members, students, frequent visitors).

The exhibitions were ranked in terms of overall appeal as follows:
1 Surrealism and Design
2 Golden Age of Couture
3 Cold War Modern
4 China Design Now
5 Fashion and Sport

The research identified the following factors as key to the decision-making process for visitors:

*Intrinsic appeal:* V&A visitors assess the desirability of an exhibition on whether it will offer an immersive and aesthetic experience (seen as the major benefit of V&A exhibitions). Where visitors are unsure what they will see, they decide to visit based on perceived self-improvement benefits (Eg I’m not sure what I will see at China Design Now, but I might learn something).

*Marketing and communications:* Communications messages are vital in maximising visitors to the exhibition. Communications that assume the audience is already familiar with the V&A and know what to expect may put off new attenders. Visitors needed clarification in the form of a byline to indicate the focus and scope of the exhibition. Choice of image and descriptive copy is vital in relaying the range of objects in the exhibition (eg for Couture, an image indicating the exhibition was solely photographs has a much
narrower appeal that a wide selection of 3D objects and images).

*Meeting visitors’ needs:* Visitors need rich, layered intellectual context to underpin their aesthetic appreciation of the exhibitions. This helps visitors to engage more deeply with the works on display, and is often the deciding factor in generating word of mouth recommendation.

*Value for money:* Communications must clearly indicate the scale of the exhibition. A small scale or 2D exhibition is expected to be free, two rooms and limited objects from the collection no more than £5, three or more rooms with diverse objects, images including loaned pieces between £8 and £10.

*Formative testing:* Testing alternative curatorial approaches, marketing messages, print and titles with visitors during the development of the exhibition will help to ensure that it is as effective as possible.

From our research with many museums and galleries, we know that the most universally appealing themes for the majority of visitors are stories about people, with local places also being highly resonant with visitors where this is relevant to the subject matter.

This holds true for evidence collected during research for new galleries at the Discovery Museum. As shown in the table below, the most popular themes overall were to do with famous and ordinary people connected to Tyneside:

<table>
<thead>
<tr>
<th>Theme</th>
<th>% of respondents interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>The story of famous people who worked on Tyneside</td>
<td>59%</td>
</tr>
<tr>
<td>Ordinary people’s working experiences</td>
<td>56%</td>
</tr>
<tr>
<td>Tyneside inventions</td>
<td>55%</td>
</tr>
<tr>
<td>History of political movements</td>
<td>41%</td>
</tr>
<tr>
<td>Sports and recreation activities on the river</td>
<td>37%</td>
</tr>
<tr>
<td>History of famous ships</td>
<td>34%</td>
</tr>
</tbody>
</table>

‘People’s experiences’ and ‘famous people’ were highly appealing to both weekday (mainly adults with specialist interests) and weekend (mainly family) visitors. In contrast, other subjects tended to appeal more to one audience or the other, with ‘major industries’, ‘political movements’ and ‘regeneration’ appealing more to weekday visitors and ‘plants and animals’ appealing more to weekend visitors.

*Relative popularity of exhibitions*

The table below shows a sample of recent paid art exhibitions, showing the relative appeal of different types of offers.
Visitor figures for temporary paid art exhibitions in London

<table>
<thead>
<tr>
<th>Appeal</th>
<th>Name</th>
<th>Dates</th>
<th>Daily avg</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass</td>
<td>Turner Whistler Monet, Tate Britain</td>
<td>10.02.05 – 15.05.05</td>
<td>4,024</td>
<td>382,269</td>
</tr>
<tr>
<td></td>
<td>Turks 600-1600 AD, Royal Academy of Arts</td>
<td>22.01.05 – 12.04.05</td>
<td>3,358</td>
<td>272,000</td>
</tr>
<tr>
<td></td>
<td>Frida Kahlo, Tate Modern</td>
<td>06.06.05 – 09.10.05</td>
<td>3,002</td>
<td>369,249</td>
</tr>
<tr>
<td></td>
<td>Caravaggio: the final years, National Gallery</td>
<td>23.02.05 – 22.05.05</td>
<td>2,752</td>
<td>244,955</td>
</tr>
<tr>
<td></td>
<td>Edvard Munch by himself, Royal Academy of Arts</td>
<td>01.10.05 – 11.12.05</td>
<td>1,486</td>
<td>107,000</td>
</tr>
<tr>
<td></td>
<td>Joseph Beuys, Tate Modern</td>
<td>04.02.05 – 02.05.05</td>
<td>815</td>
<td>71,704</td>
</tr>
<tr>
<td></td>
<td>Open systems: rethinking art around 1970, Tate Modern</td>
<td>01.06.05 – 18.09.05</td>
<td>416</td>
<td>45,793</td>
</tr>
<tr>
<td></td>
<td>A short history of performance part III, Whitechapel Art Gallery</td>
<td>04.10.05 – 09.10.05</td>
<td>358</td>
<td>1,893</td>
</tr>
<tr>
<td>Niche</td>
<td>Gabriele Münter 1906-1917, Courtauld Institute Gallery</td>
<td>23.06.05 – 11.09.05</td>
<td>306</td>
<td>24,757</td>
</tr>
</tbody>
</table>

(The Art Newspaper 2006)

An exhibition featuring famous names that appeals to visitors with a range of motivations and is marketed as a blockbuster will attract the most visitors. On the other hand, an exhibition on a single less well-known artist or theme that will only appeal to visitors with special interests will attract fewer visitors.

**Turner and Venice, Tate Britain**

Programmed at Tate Britain in 2003, the combination of world famous artist and world famous city gave this exhibition instant mass appeal. The exhibition was marketed as an accessible, must-see blockbuster with a large budget from sponsorship with Barclays.

Partnerships were also formed to lever as much free coverage as possible. The Daily Mail was used to target potential visitors from CDE social grades, with advance tickets targeted at older people and free prints for younger potential visitors. Special events (eg readers’ evenings) attracted first time visitors from across the UK. The Evening Standard was used to target 25-35 year olds in the more local catchment area. These partnerships resulted in significant uplift in advance ticket sales and high awareness levels amongst target groups.

Caffe Nero displayed point of sale marketing materials and the Association of Train Operating Companies allowed local stations to be plastered with posters.

15,000 people attended a family Venetian carnival day, where the building was dressed in Venetian style by the National Theatre with actors from Commedia dell’Arte performing around the gallery. Pizza Express brought ovens to run pizza making activities with children. (Gompertz 2004)
4.8 The role of special events

Special events can be a very successful way of attracting new visitors to venues.

Special events have the widest appeal and greatest success with the general audience when a variety of activities are provided for a wide range of different ages and abilities, along with plenty of social facilities and activities. This makes the event a highly attractive proposition for groups and families where everyone wants to have fun and learn something at the same time, and appeals to the widest possible group of potential visitors. The following examples show how arts organisations have successfully applied events for the general public along these lines.

**1940s event, Bristol Museums**
The 1940s weekend staged by Bristol Museums Service attracted over 15,000 visits. The event consisted of activities and entertainment for all ages with strong links to museums collections.

**The Long Weekend, Tate Modern**
This campaign aimed to attract existing and new audiences to Tate Modern’s recently rehung permanent collection. In particular, the gallery aimed to attract adult Londoners who are occasional gallery attenders, young Londoners (16 to 24) who don’t visit galleries, London families and Regular Tate attenders.

The Long Weekend was four themed days across May Bank Holiday weekend, programmed for each of the target markets. The young Londoners’ programme was informed by discussion with the Tate’s Raw Canvas group (16 to 24 year olds who work with the gallery and put together their own events). This included a skate park, graffiti installations, film and video workshops, break dancing and appropriate food carts and juice bars. The youth-targeted marketing campaign included a bespoke flyer commissioned from a skate illustrator distributed to targeted lists and at relevant venues (youth clubs, skate parks, gigs), a youth mini-site for the event, email and text campaigns initiated by Raw Canvas, and coverage on XFM and Choice FM.

The event was a huge success – 111,000 visitors to the gallery in four days, the busiest period at Tate Modern since its launch, and 44% more visitors than a normal bank holiday. All ticketed evening events were filled to capacity.

The event attracted 36% first time attenders, and 49% of people said they
would not have visited if the event hadn’t been on. (Eva 2006)

Arts events can also succeed in developing entirely new audiences for the arts by taking arts content out of traditional venues and into more neutral / social spaces, helping to break down negative preconceptions.

**ArtsFest, Audiences Central**

ArtsFest was a collaboration between Audiences Central, Birmingham City Council and over 250 arts organisations. The aim was to increase future arts attendances, with particular emphasis on encouraging new attenders to try arts within the region.

The group produced the UK’s biggest ever weekend festival of free arts event – ArtsFest 98 comprised 230 events involving over 1,000 artists, over three days on three outdoor stages, 11 indoor venues and tents in Birmingham city centre, and a satellite site at mac. Over 75,000 people attended, with over half of attenders either first time or very infrequent arts attenders, with people trying on average over three artforms during their visit. 42% of attenders had since gone on to attend other arts events and said ArtsFest had influenced their choice. 44% of new and lapsed art attenders said the event had prompted them to make a visit to an arts event.

ArtsFest 99 attracted over 110,000 people, 54.2% of whom said they experienced new art events, and 67.5% of whom had tried new art events seven or more times since then.

ArtsFest 2002 attracted 120,000 people, 11% of whom were non-arts attenders and 15% very infrequent attenders. Six months on, 20.5% of people had attended an arts event as a result of ArtsFest. (Johnson 2004)

Special events can also be used by arts organisations to increase engagement of particular groups with the organisation, by tailoring events to suit their needs, practical circumstances and motivations. There is anecdotal evidence that this sense of ‘special treatment’ of participants by the organisation can quickly foster strong relationships.

**Hotspots, M6 group**

The M6 group (consortium of ten visual arts venues in the West Midlands) developed this project in an attempt to attract under-represented audiences not being reached through current marketing activities.

Each venue identified geographical hotspots containing large numbers of non-
attenders from target groups, and then invited these audiences to a series of taster events. Most venues tested the effectiveness of direct mail by sending special invitations to target mailing lists, whilst others used a personal approach by telephone to attract organised groups from particular areas. Participants responded well to the personalised approach of the scheme, saying it made them feel valued and wanted.

325 people attended a total of seven taster events across the region. The invitations to dedicated events were very successful – over 58% of attenders were making their first visit to that venue. 35% of attenders to events had not visited a visual arts event in the past 12 months, 92% said they would be much more likely to attend the gallery again and over 90% said they would be more likely to attend a similar event in the future. (Johnson 2004)

**Time Out, Sheffield Galleries and Museums Trust**

This project aimed to promote the major public visual arts venues in Sheffield as places for time poor young professionals (20 to 34) to visit. It used extended opening hours, market research, partnerships with local businesses and events linked to exhibitions to encourage first time and repeat attenders in the target age band.

1,330 people attended Time Out events across the venues (Millennium Galleries, the Graves Art Gallery and Mappin Art Gallery), 41% of which were new attenders.

Many were attracted by the social and informal aspects of the events, and 82% expressed an interest in cross-artform events which mix visual art with music, film or performance. 75% were interested in extended gallery opening hours, favouring a late night in midweek. Although free events were the most popular, time was a bigger barrier than price for this group. This time pressure makes word of mouth particularly important for this market, with 62% of visitors having heard about an event from someone they know. (Johnson 2004)

**Tranquility Tours, Manchester Art Gallery**

Two years after reopening, Manchester Art Gallery realised that there were a lot of people who had been meaning to make a return visit to the new gallery, but had not been yet. The gallery decided to use a ‘prod’ campaign to activate these visitors. One of the campaigns used was the tranquility tours.

These tours aims to bring city centre workers into the gallery at lunchtime, encouraging them to relax away from their desks. A curator chose the five
most relaxing paintings in the gallery and an expert spoke about how art can relieve stress. Visitors on the tours were supplied with dots to wear which changed colour according to how stressed the individual was. Traffic wardens and corporate patrons were invited to the first tour which was also the media launch. This resulted in £1.1 million of media coverage compared with the £2,000 the scheme cost to run. The scheme became a talking point in various media – The Times started a debate about which paintings in other collections are the most relaxing, and the scheme was featured on Richard and Judy.

4.9 The role of new product development

The launch of a new or refreshed gallery in a museum or gallery gives existing and lapsed visitors a reason to return, and can also be used to relaunch the entire organisation, bringing the venue to the front of the public’s mind, persuading intenders to become attenders and repositioning the organisation’s brand.

The Launch of Enginuity, Ironbridge Gorge Museums

Ironbridge used the launch of Enginuity to enhance the overall performance of the Ironbridge Gorge Museums, redefining the Ironbridge brand essence, values and personality, rearticulated the brand benefits and renewing interest in the Ironbridge sites. The campaign particularly aimed to attract families and visitors from DE socio-economic groups.

The museum concentrated the entire Ironbridge budget for the year into promoting the launch of Enginuity. The campaign consisted of PR features on regional news programmes, bursts of local press advertising, door-to-door campaigns and leaflets available from Tourist Information Centres, all staggered in a ‘pulse’ campaign to encourage word of mouth and maximise the limited budget.

The campaign was based on the promise of discovery, the basic proposition being that visitors could discover the secrets behind the world’s greatest discoveries themselves, whilst having fun.
The campaign produced outstanding results for Ironbridge. The potential Ironbridge market (people who would consider visiting) grew by 714,000 people. Of these, 613k were families, 515k were socially driven and 378k were from D and E social groups. This remarkable achievement did not have any negative effect on Ironbridge's traditional audience, the market size of which also increased.

Around 40% of visitors to Enginuity were making their first visit to Ironbridge, with 80% having been influenced by the campaign – 65% had seen TV advertising and 46% had seen press. The first two months of the campaign saw visitors increase by 36%.

The campaign dramatically shifted brand perceptions amongst the potential market, so that in 2003 Ironbridge was seen far more as a venue for an enjoyable day out and as a place to find out about industrial history compared to 2001.

The pulse campaign was particularly effective at renewing interest throughout the year and generating word of mouth recommendations. (Morris Hargreaves McIntyre 2003c, BJL 2003)
5 Segmentation of museum and gallery visitors

5.1 Why segment?

Segmentation is the recognition that the audience is not an homogenous mass, but rather a collection of distinct and discrete segments, each with different needs, attitudes and expectations.

By defining, profiling and differentiating the marketing mix for these segments, you can optimise your offer to meet audience's needs.

5.2 Segmentation systems

There are many different ways of which are useful for different purposes. Typical variables used include:

- Age
- Postcode
- Media consumption
- Social class

Geo-demographics are used by proprietary systems such as ACORN and MOSAIC. These systems can produce segments such as '25-34 year old ABC1s' or 'Stylish Singles within a 15 minute drive time'.

Some systems look specifically at different aspects of people's consumption. For example, TGI have segmented the UK leisure market into six roughly equally-sized groups:

- Couch potatoes
- Home bodies
- Telly addicts
- Hedonistic dilettantes
- Silver scholars
- Culture vultures

These generic profiles can then be used to segment existing visitors to venues, as well as quantifying the potential market.
We know from experience that while demographic segmentation is very useful, particularly for mass-market products, factors such as age, postcode and media consumption are not defining features in differentiating one museum visitor from another. The main differences between museum visitors tend to be their needs, motivations and behaviour rather than where they live or how old they are.

Morris Hargreaves McIntyre have carried out detailed segmentations of the current markets for many national museums and galleries, looking in detail at visitors' motivations for visiting, the exact circumstances of their visit, their existing relationship with the venue and their existing knowledge, amongst other factors. Segments are mutually exclusive, measurable and based on how visitors use and respond to the museum. A segmentation system based on these factors can be useful for:

- Visitor services: to clarify and define the needs of different visitors, and why they behave as they do.
- Communications: each segment requires a tailored marketing strategy if it is to be effectively communicated with and attracted to visit.
- Interpretation: the segments can help to focus and rationalise interpretation. Segments can be a useful tool in answering ‘Who is this exhibition for?’ and successfully engaging visitors at different levels by meeting their needs.
- Common internal language about visitors.
- In depth analysis and monitoring of specific issues: segments can be used to interrogate rolling research data for detailed insight into trends and problems.
- Attracting non-visitors: segments can help devise and monitor the effectiveness of marketing and audience development plans – new visitors are normally socially motivated.

**Audience Builder, Bristol Old Vic / Morris Hargreaves McIntyre**

Audience Builder uses existing box office data from ticketed venues to create a comprehensive, practical and trackable segmentation system.

The system uses frequency (number of bookings over time) and degree of difficulty attempted (based on classification of accessibility of events booked) as the defining variables. These factors are both already recorded in behavioural data collected on box office systems, meaning that any changes in behaviour can easily be measured and tracked.

For Bristol Old Vic, the categories were as follows:
Degree of difficulty:
A – new writing; work by obscure writers; work outside the mainstream
B – ‘serious drama’; Ibsen, Chekhov, Shakespeare’s tragedies and histories
C – ‘mainstream’ work; plays people know; well-known actors
D – ‘accessible’ work – Godber, Ayckbourn, Coward
E – family shows

Frequency of attendance:
1 visit in the past 12 months
2-3 visits in the past 12 months
4-5 visits in the past 12 months
6+ visits in the past 12 months

By plotting these factors against each other, the system produces the ‘audience climbing frame’:

<table>
<thead>
<tr>
<th>Audience Climbing Frame</th>
<th>Frequency of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1-5</td>
</tr>
<tr>
<td>A</td>
<td>1,102</td>
</tr>
<tr>
<td>B</td>
<td>1,512</td>
</tr>
<tr>
<td>C</td>
<td>2,677</td>
</tr>
<tr>
<td>D</td>
<td>2,580</td>
</tr>
<tr>
<td>E</td>
<td>3,606</td>
</tr>
<tr>
<td>Total</td>
<td>12,074</td>
</tr>
</tbody>
</table>

Each square represents a distinct segment with a distinct profile, attitudes and behaviours. Within this, it is possible to magnify each segment, looking at the detail of their behaviour and target marketing activity accordingly. The impact of any targeted campaigns can then be measured by interrogating box office data according to segment. (Morris Hargreaves McIntyre 2003)

5.3 Application of segmentation

Edinburgh International Film Festival, psychographic segmentation

In 1999, Edinburgh International Film Festival (EIFF) commissioned Morris Hargreaves McIntyre (MHM) to carry out a psychographic segmentation of their audience. Qualitative and quantitative research identified three macro segments (of broad psychographic attitudes) consisting of eight sub groups (consisting of behaviour and demographics):

Risk Takers: confident, open minded opinion formers who are inner-directed
and intentional attenders.

**Vocationals:** professional or personal involvement with film.

**Avids:** very high frequency of attendance (11+ screenings)

**Confident Selectors:** customers aged 25+ with high frequency attendance (3-10 screenings)

**Conscious Image Builders:** customers aged under 25 with high frequency attendance (3-10 screenings)

**Cautious Gamblers:** early adopters, early majority who require endorsement but are open-minded and fashion-conscious.

**Mainstream Selectors:** high frequency attendance (3-10 screenings)

**Open Minded Samplers:** low frequency attendance (2 screenings)

**One-off Incidental:** very low frequency attendance (1 screening)

**Safety First:** conservative and risk averse.

**Arthouse Strangers:** had not attended any arthouse screenings in the past 12 months.

The research showed there was still potential to attract Risk Takers from outside Edinburgh, as well as increasing attendance from Cautious Gamblers. The report recommended that that EIFF should package films to steer bookings for less popular films, develop publicity to attract cautious gamblers, develop systems to encourage multiple bookings and monitor levels of attendance using the psychographic segments.

The festival responded by changing the main brochure to make it more accessible to new audiences and a guide was developed to help less knowledgeable attenders make decisions. Print distribution was more tightly targeted and activities were undertaken to raise the profile of EIFF amongst Edinburgh residents and potential incidental visitors. Monitoring the effect of these changes in 2000, MHM found that there had been an increase in average frequency amongst Conscious Image Builders and Mainstream Selectors (the two segments targeted by the new print and publicity), and gains in Avids, Conscious Image Builders and Mainstream Selectors as well as One-off incidentals. (www.a-m-a.co.uk, Morris Hargreaves McIntyre 1999, 2000)

**National Galleries of Scotland, ongoing visitor research**

National Galleries of Scotland have commissioned Morris Hargreaves McIntyre over a number of years to research the profile and motivations of existing and potential audiences to all their sites. This research informs every aspect of the organisation’s marketing strategy, as well as monitoring techniques and the development of a vigorous set of performance indicators.
The research has also developed to include motivations for attendance, visitor behaviour within the galleries and information needs of visitors which further informs the strategic marketing of the organisation. (Doyle 2005)

Visitor audit, Tate

In 2003, Tate commissioned Morris Hargreaves McIntyre to undertake a study of visitors at Tate Modern and Tate Britain. The aims were to analyse the ways visitors construct their experience at Tate and to understand the motivations, attitudes, perceptions and reactions of visitors in relation to the organisation.

The research looked in detail at every aspect of visits to both galleries, and segmented audiences at both galleries based on their behaviour, consumption and attitude towards contemporary art, producing eight distinct segments:

Aficionados: visual arts professionals seeking inspiration and escapism
Actualisers: non-visual arts professionals seeking inspiration or soul food
Sensualists: non-visual arts professionals, culture vultures seeking emotional experience
Researchers: visual arts professionals on research and development visits
Self-improvers: people developing their visual arts knowledge
Social spacers: people visiting or meeting with others, wanting to make the place their own
Site seers: mainly tourists wanting 'to do' the Tate
Families: mixed age groups, social and intellectual motivations

This gave Tate a deep level of insight into the needs of its audience, informing strategic planning for the organisation as well as a framework and benchmark from which to measure the effect of future changes. (Eva 2006 and Morris Hargreaves McIntyre 2004c)
Publicity, awareness and marketing

6.1 Relative success of different tools

Overall influence of promotional tools

The chart below compares the effectiveness of different publicity channels in the North East to the national average.

% of visitors influenced by publicity – North East and national average

(Ipsos MORI 2005)

Although the patterns of influence on visiting in the North East follow national trends, the effectiveness of many traditional marketing tools in the North East is lower than the national average. Increased marketing activity might be useful in attracting different types of visitors to each site (Ipsos MORI 2005). In particular, banners outside venues, posters and leaflets are performing less well in the North East than elsewhere. However, visitors are responding well to TV and radio campaigns and word of mouth is even more important in the North East than elsewhere.
Influence of promotional tools on different audiences

Mintel’s recent survey on the days out market revealed the following differences in effectiveness of various information sources for different demographic groups (Mintel 2006):

- **Families**: Are most likely to ask friends / relatives for suggestions (55%), or return to places they have been before (41%). This is understandable given that families tend to be fairly risk averse and need to know their needs will definitely be met.
- **Older people**: Are most likely to use more traditional promotional material eg what’s on listings (33%) and least likely to use the internet (7% of retired people).
- **Young people**: Are most likely to ask friends / relatives (53%) followed by the internet (47%).

People in DE social grades are less likely to use promotional channels across the board, implying that a strong reason for low levels of visiting from this group is lack of information.

6.2 Awareness of free entry

MORI’s 2002 research into the impact of free entry on museum visiting showed that 40% of the population – two out of five Britons – were unaware that admission charges had been scrapped the previous December.

This is evident at Tyne & Wear venues. Of visitors to the National Gallery touring exhibition Passion for Paint in 2006, 15% (around one in seven) visitors were unaware that admission to the Laing Art Gallery was free before they made their visit. This rose to 30% for visitors who were making their first ever visit or were lapsed attendees to the venue. We can infer from this that there is still a pool of potential attenders still unaware of free entry who are on the cusp of visiting, and may be persuaded to do so simply through clearly advertising that admission is free for all. (Morris Hargreaves McIntyre 2006b)

Furthermore, 15% of visitors to Passion for Paint were unaware that entry to the exhibition was free before their visit, with 46% of lapsed / first time visitors unaware. Again, this suggests that there is capacity for special exhibitions to attract a larger audience by including ‘free entry’ in all publicity materials / more prominently (Morris Hargreaves McIntyre 2006b). Interestingly, MORI research suggests that 26% of visitors to free venues are now more willing to pay for temporary exhibitions – on the downside, this means that 74% are not more willing to pay (Martin 2003).
However, whilst 15% of the population were aware of free entry and felt that this had encouraged them to make more visits (with 7% making many more visits), 41% of people knew about free entry but this had not changed their behaviour (Martin 2003). Whilst there have been more visits to museums and galleries since the introduction of free entry, it is debatable whether this has directly encouraged new visitors – some TGI data suggests that current museum visitors are simply making more visits. Data shows that any new visitors generated by free entry tend to be within the traditional museum-going profile: white, well educated and middle class (Matty 2004). There is little evidence that free entry alone has increased social inclusion in museums – see chapter 9 for more discussion of non-visitors.

6.3 The role of recommendation

Mintel data shows that 47% of people in the UK ask friends or relatives for suggestions when looking for information for days out – the most popular source for information overall, with the next most popular source of information being returning to places they have visited before (37%). In particular, people aged under 45 are more likely to rely on recommendation, with 59% of 20-24 year olds naming this as a source of information (Mintel 2006).

MORI data shows that the biggest influence on visiting museums and galleries nationally is word of mouth recommendation (30% of visitors say this factor encouraged them to visit). In the North East, this rises to 32% of museum and gallery visitors (Ipsos MORI 2005).

Word of mouth is any consumer-to-consumer communication – from face-to-face conversations with friends and family to chat rooms. Millward Brown (2006c) have identified three factors which have increased the relative importance of word of mouth:

- Increased consumer distrust of traditional marketing communications
- Multiplicity of brand choices in most product and service categories
- Increased speed and breadth of dispersion of information via new communication technologies.

This generates:

- Buzz: reflects interest in something new and cool – forms social currency encouraging pass along from one person to another. Unlikely to directly influence purchase decisions.
• Advocacy: positive or negative communications about a product or brand, likely to influence short term behaviour especially when it comes from a trusted source.

Main factors influencing people's susceptibility to word of mouth are:

• Proximity of the purchase decision
• Purchaser's need for advice
• Perceived reliability of the source

Therefore, word of mouth is most effective when someone is just about to make a visit / buy a ticket, when they are not confident in making choices or feel they lack knowledge to make informed choice, and when the information is from trusted, knowledgeable, independent source (e.g. friend who has recently visited, shares tastes and is a more experienced visitor).

Personal contacts are considered to be more useful than online word of mouth (chat rooms, blogs etc) when looking for advocacy. These sources tend only to act as a sales driver when risks are small and when the source is a trusted one.

Negative word of mouth also lasts longer than positive messages. It is essential that organisations correct the product to tackle negative word of mouth.

Millward Brown (2006c) recommend the following to maximise the positive impact of word of mouth:

• Identify what will resonate most with the users who are already willing to recommend your brand, then accentuate it.
• Focus on how to create direct involvement through advisory panels, exclusives, loyalty and membership schemes.

Generating word of mouth is a technique built on trust. A brand caught trying to manipulate customers’ word of mouth is likely to suffer a backlash. For example, Vichy in France launched a website called ‘Claire’s blog’, supposedly written by an enthusiastic customer of Vichy products. The blog was subsequently revealed in Le Monde that the blog was written by the company. Vichy pre-empted negative word of mouth by launching a genuine user blog, where customers could post uncensored comments about their experiences of the products.

Word of mouth has the power to be a very effective tool for the arts as the product being sold has benefits for the user, and the non-commercial nature of visiting museums and galleries means this lacks the negative connotations of recommending commercial goods or hard sell products.
6.4 The role of school visits

One in five parties visiting North East venues with school age children do so because the child, having previous been there on a school trip, wants to return (Ipsos MORI 2005). Whilst this is in line with the national figure, it is an especially important factor in the North East as museums and galleries in the region attract a greater proportion of family visits compared to the national average.

The following case study describes an initiative to maximise the conversion rates from child recommendation.

Schools into families campaign, Audiences Yorkshire

This campaign to increase family visiting ran across 10 museums and galleries in Yorkshire during April and May 2006. It aimed to harness existing contact with children through educational work as a way to drive family visits.

Research revealed that school and family visits to museums and galleries were viewed as positive experiences by children and parents alike, and that most children wanted to return to a museum or gallery they had visited through school. However, few children remembered getting anything to take home from a school visit, or lost it before they had a chance to give it to their parents. Parents felt that information given to them from the child about discounts and special events at the museum would make them more likely to plan a family visit. Parents wanted to be reminded of their child's visit, and also for any offer to be time flexible. Incentives for child and adult were also important.

Children were given a postage paid postcard at the end of their visit, which they wrote and sent to their parents. The postcard was branded from the museum / gallery they had attended and invited the parents to make a free return visit to the venue. The family were able to redeem their postcard for a free goody bag for the child during their visit.

As well as fun items for the child, the goody bag contained a booklet of offers for the other participating venues. This encouraged families to make further visits to museums and galleries across the region.

Whilst the uptake of the scheme was very low (around 2%), this highlighted the need to engage teachers more effectively with the scheme: the response postcards took longer to fill in than anticipated, there were issues with children giving address details (teachers thought there were data protection issues, although the data was not actually collected) and teachers could have been given more advance notice of the scheme. (Audiences Yorkshire 2006)
The role of social visiting

Research by Alan Brown (Brown 2004) has shown that the social context of visiting has a major impact on the decision to visit: who invites you to a concert has as much influence on the decision to visit as other factors such as temporary exhibitions. Arts attenders can be divided into two categories:

Responders

- Strongly agree with the statement: ‘I’m much more likely to attend cultural outings if someone else invites me.’

Initiators

- Strongly agree with the statement: ‘I’m the kind of person who likes to organize outings to cultural events for my friends.’
- Tend to be core arts consumers, who visit more, participate more and actively search out cultural experiences more than the rest of the population.

In a US survey of adult arts attenders in 2001, 18% were initiators, compared to 56% of responders: responders are three times more common than initiators in the population. This means that many potential attendees are passive, waiting to be invited by someone else – they are ‘responders’. Another smaller group are ‘initiators’ who organise responders, prompt them to visit and recommend to friends – they are the drivers of word of mouth.

The following case studies show various successful approaches for leveraging this social context to increase audiences.

Ravinia Dollars sales programme, Ravinia Festival, Chicago IL, USA (Brown 2004)

Started 50 years ago, this scheme uses volunteers to generate advance ticket revenue for the suburban Chicago festival. For $20 customers get $25 worth of Ravinia Dollars, which can them be redeemed for tickets to any festival performance. For many years, volunteer chairpeople in each of the Chicago suburbs recruit a committee of ticket sellers who sell ticket booklets to their friends. Although now most of the annual sales of Ravinia Dollars are made through the website and retail outlets, volunteers are still selling.

(www.ravinia.org)

Alan Brown (Brown 2004) notes that ‘the promise of spending quality time with friends is the aphrodisiac that sells tickets’. With over a third of visits to museums and galleries primarily socially motivated, this is a powerful source of persuasion for potential visitors.
**ORBIT online invitation tools (Brown 2004)**

Several orchestras in the US are pioneering the use of web-based tools that help initiators invite friends to concerts and organise purchasing and seating.

www.victoriatheatre.com/orbit/orbit.html

www.kcsymphony.org/TheSymphonyExperience/orbit_faq.jsp

www.lbso.org/Invite.html

**Cultural Ambassadors, City of Birmingham Symphony Orchestra**

This scheme aimed to increase the number and range of people attending its concerts. 20 existing attenders were recruited from CBSO mailing lists as Cultural Ambassadors: 'well-briefed voluntary supporters willing to evangelise about the Orchestra and its work who have a sufficiently diverse social network to encourage parties of their friends and/or fellow club members to attend concerts'.

The ambassadors brought 28 groups or personal friends, neighbours, work colleagues and societies to ten CBSO concerts, using a 25% discount on parties of ten or more, free ticket for group organiser, free programme, interval reception with musicians and personal attention from a member of staff throughout the evening. The project reached 500 people, 440 of which were completely new to the orchestra.

The scheme was successful in attracting more attenders similar to the existing audience, but did not address specific target audiences. The project found that information about the programme should be mailed well in advance to ambassadors (about 4 months before the event), that an initial introductory event is useful in establishing relationships between the ambassadors and the organisation, and that transport links are a consideration for large groups, raising the possibility of package travel and ticket deals. (Johnson 2004)

**People's panels, National Gallery Touring Exhibitions Partnership, Bristol's City Museum & Art Gallery and the Laing Art Gallery**

Bristol Museums and Tyne & Wear Museums are both running innovative 'people's panels' as part of their three year partnership project with the National Gallery. Each year, an exhibition tours to all three venues. Before the exhibition opens, each venue runs an intensive 10-week course for a panel of around 20 members of the public, from a diverse range of backgrounds. These panels are given insight into the staging of the exhibition and work to create their own interpretation which sits alongside the National Gallery authored interpretation in the gallery. Past projects have included touch screens, DVD /
audio works, objects to feel and trails around other galleries in the building.

This gives participants a deep sense of pride and belonging in the gallery – building an extremely strong relationship with individuals. There is mounting evidence that participants are encouraging visits from previously excluded or non-visiting members of the community, by acting as passionate advocates for the exhibition and the gallery in general, and also conducting independent guided tours of the exhibition for friends and family. (Morris Hargreaves McIntyre 2006b)

6.6 Mass media

Campaigns which combine a number of mainstream media channels are useful where museums and galleries want to communicate with the broadest possible audience. This is most useful for raising general awareness of the basic offer, or promoting a blockbuster exhibition or change in product which will appeal to the mass market.

Birmingham City Council, 'Tourist' campaign

This campaign was designed to remind Birmingham citizens about the many and varied cultural and leisure attractions in the city. The campaign had dual objectives – to remind residents of the attractions on their doorstep, and to raise awareness of the varied work of the city council in the cultural industries. The campaign also aimed to act as an umbrella scheme, under which smaller communications campaigns could be structured within the same framework and identity.

A wide range of media was used over a short period of time – 30 second slots on ITV Central, radio and train TV and 700 citywide poster sites (see below) throughout September 2006.

The agency chose a high impact campaign, using humour and a bold graphic style to grab attention in crowded advertising environments. The communications proposition was based on the fact that over 19m people visited Birmingham in 2005 yet its citizens were ignoring what was at the end of their street. The campaigned aimed to take a good natured swipe at local
culture and those of tourist visitors. The high profile campaign was titled ‘Tested on „,, tourists’, with other campaigns evolving this basic formula:

Although evaluation of the impact of the campaign is not yet available, there was a significant uplift in public satisfaction with cultural services in 2006/7 compared to the 2003/4 results. There was a 58% satisfaction rating with museums/ galleries in 2006/7 compared to 46% in 2003/4, and 60% satisfaction with theatres / concert halls compared to 53% in 2003/4. 68% rated cultural services good or very good, and 49% said cultural services were improving, with only 4% saying they were getting worse.

6.7 Print

At the moment, North East venues as a whole are less successful with print than the national average. Whilst general print can often be a relatively inefficient way to market the offer for museums and galleries, targeted print produced for and/ or distributed to specific audiences can be very effective. In particular, young people respond well to targeted print materials although this is not the most effective way of reaching this group (see section 5.6 above). Innovative print still has the capacity to attract visitors and can be used as a product in itself.

Raw: The People’s Guide to contemporary art, Nottingham Museums and Galleries

This project was designed to raise awareness of and engage the local audience with British Art Show 6.

Raw aimed to ensure that as many local people as possible could access the exhibition without feeling excluded through lack of knowledge or experience. To achieve this, the project engaged local people in interpreting artworks in British Art Show 6 resulting in the creation of an accessible guide to help other visitors understand contemporary art. This guide was free to visitors to the exhibition, and provided a physical link between the five participating venues encouraging visits to multiple sites.

The community project engaged over 80 participants from different sections of the Nottingham community in creating interpretation and engaging with
artworks in a variety of different ways. These participants gained increased knowledge and confidence with contemporary art, as well as wider skills and social benefits from working on the project. These participants will be invited to be involved in future projects with the galleries.

14,000 guides were distributed to accompany British Art Show 6 in Nottingham. Although no formal evaluation was carried out to gauge the impact on general visitors, anecdotally the scheme was very successful raising awareness of the British Art Show and contemporary art in general. Visitors were observed using the guides whilst engaging with the art in the galleries as an additional interpretative tool, and staff received a variety of positive comments from the public.

**Create Your Own Collection, Tate Britain**

Following the opening for Tate Modern, Tate Britain suffered falling visitors with little success from marketing campaigns – this campaign sought to address this problem. The campaign aimed to raise awareness and attendance of the Tate Britain Collection displays.

Tate used their segmentation research (see Visitor audit, Tate case study in section X below) to identify a segment of the Tate audience who were coming to Tate Modern far more than Tate Britain and had potential to visit both sites. These were the Social Spacers – frequent gallery visitors who see it essentially as a social activity and are interested in art but are looking to make the space their own and will drift around the gallery. The research showed that Social spacers who did not visit Tate Britain saw it as a traditional, worthy venue that did not meet their social needs. The Create Your Own Collection campaign was designed to dispel these negative preconceptions.

The campaign is based on 17 different leaflets, for example The I’m Hungover Collection, The I Haven’t been here for Ages Collection, The I Like Yellow Collection. These were designed as self-guided routes around the gallery, all with a fairly light-hearted tone and designed with a social visit in mind – including breaks in the café and assuming that some visitors would be visiting in groups. The leaflets also had a contemporary design, aiming to challenge the old-fashioned image that some visitors held of the organisation.

The campaign generated a large amount of press coverage, and was also promoted through underground posters. These were long copy ads, designed to be read during the average three minute wait on tube platforms. These were friendly and informative in tone, trying to resonate with the state of mind travellers might be in. The leaflets were also distributed outside train stations on different days (topically) and The First Date Collection was inserted into
Time Out.

Since the campaign, there has been an increase in visitor figures to the Tate Britain Collection. Even though the campaign started six weeks after the London bombings, there was a 20% rise in visits to Tate Britain. Leaflets had to be reprinted within eight weeks of the campaign starting. There was also a very positive response from visitors. (Eva 2006)

6.8 On site

At the moment, on site promotion is less successful in the North East than elsewhere in the country. Eyecatching publicity outside venues can attract passersby to make incidental visits. This is a useful method for advertising the general mass market offer of a venue that would appeal to incidental and new visitors – free entry, family friendliness and a social space. It can also be very successful in driving visits to blockbuster exhibitions with mass appeal.

Publicity for exhibitions within the venue itself can be crucial in driving visits to temporary exhibitions, or newly developed galleries.

*Wildlife Photographer of the Year, Bristol’s City Museum and Art Gallery*

Visitor figures for the Wildlife Photographer of the Year 2006 exhibition were up 80% on the previous year, attracting around 75,000 visitors over its 5 week run.

Along with targeted distribution of print, vinyl images were used on the glass front doors of the gallery, animating the building and grabbing the attention of passing pedestrians and traffic (in previous years, visitors had said the gallery could do more to attract passing visitors).

Vinyl footprints were used on the floor of the foyer, leading visitors from the front door to the exhibition gallery. This was based on feedback from visitors about welcome and orientation in the main foyer and wayfinding to the temporary exhibitions gallery.

6.9 Guerilla / stealth marketing

Marketing techniques that attempt to sneak under the radar of brand-sawy consumers, particularly younger consumers who can be sceptical of traditional marketing messages and may connect more readily with campaigns which use media connected to youth culture (see section X on youth markets above).
However, campaigns using these tactics – and particularly those which are borrowing heavily from youth culture – can backfire dramatically if they are perceived to be cynically leeching or copying 'cool' without being part of the community. A recent graffiti campaign by Boxfresh using its ‘We Are You’ strapline saw backlash messages added to the advertisements. The adverts were offensive because they attempted to encroach upon creative youth spaces (typically hidden graffiti spots) and mimicking contemporary youth style to sell commercial products:

(Manchester 2004)

Museums and galleries are particularly well placed to use creative and innovative guerrilla marketing techniques as they are less likely to be seen as corporate fakers and more likely to have a genuinely interesting message and offer. The potential to engage artists in this process would also appeal to the youth market.

**Chalkings, Belfast Cathedral Quarter Arts Festival**

The festival recently hired an artist who normally works in chalk on pavements to implement a teaser campaign around the city. In one night, the artist produced a series of chalk drawings on walls with details of the festival directing people to the website. This produced a huge response and the festival received lots of positive feedback from the public.

### 6.10 Customer relationship management

**Why use CRM?**

As well as attracting new visitors, it is essential that museums and galleries develop relationships with their existing visitors, helping to avoid a ‘revolving door’ scenario where visitors come once to the venue but are then never given a reason to return. By focussing on retaining visitors and encouraging repeat visits organisations make more effective use of marketing resources, generate increased income and a more loyal and committed customer base who will act as advocates and be more supportive of artistic / curatorial risks. (Raines 2006)
Loyalty is difficult to measure. However, useful indicators can be summarised as:

- Retention: how many customers are retained from one year to the next
- Frequency: how often an individual visits in a year
- Lifetime: how long in total visitors have been visiting, however infrequently
- Value: how much customers spend or donate (Raines 2006)

**What does CRM involve?**

Customer relationship management (CRM) is based on the following three principles:

- It is worth trying to develop long-term relationships with customers
- Customer retention is vital
- In order to develop these relationships, the organisation must commit to two-way dialogue with customers

Many CRM texts refer to the loyalty ladder, a version of which is shown below. The further up the ladder visitors / customers are, the deeper their relationship with the organisation and the more they visit / purchase.

**The loyalty ladder**

![Loyalty Ladder Diagram](image)

(Tomlinson and Roberts 2006)

Overall norms on frequency of visiting / buying tickets are shown in the table below. These figures are based on patterns observed long-term by various arts consultants in the UK, and also shown consistently in TGI data.
On one hand, this validates the approach of increasing customer loyalty and attempting to develop relationships with visitors to encourage more visits. On the other hand, the fact that these proportions are largely static and other evidence suggests that these proportions may be self inflicted by arts organisations’ marketing strategies – perhaps the general brochure is only effective in persuading 15% of visitors to make a visit, meaning that frequency of repeat visiting can only be effectively increased by segmenting the market and devising bespoke marketing techniques for each segment (see chapter on segmentation below).

The stages of the CRM process are summarised in the following model:

**The CRM virtuous circle**

Sophisticated email lists and online resources are perhaps the most obvious methods of customer relationship management currently used in the arts – successful systems use a combination of methods to implement a process similar to that described above. Any type of activity which seeks to move visitors up the audience ladder will need to segment its audience according to their relationship with the venue, and set up systems to track individual behaviours and attitudes. For this reason, the method is more suited to ticketed venues than those with free entry.
Teleprompt, Buxton Opera House

Buxton opera House was successful at attracting first time attenders and keeping very regular attenders through loyalty schemes, but suffered somewhat from revolving door syndrome, with few marketing tools to develop irregular and one-off attenders.

It seemed that the existing print, press advertising and editorial was not reaching this audience as they are passive attenders, who are not buying in to an ongoing relationship with the Opera House. Teleprompt was devised to use the telephone to build up a more personal relationship with these customers, offering a tailored information service and adopting a soft-sell approach, with no obligation to buy but rather to prompt action after the customer had received show information. The campaign aimed to prompt one-off attenders to return and to keep prompting them until they reached their optimum frequency of attendance – people were called every quarter to give information.

7,000 patrons were identified from the box office system who had booked only once, over 12 months ago and spent less than £60. They were called with a carefully worded script, ensuring that patrons knew this was purely an information service. This was then followed up with a personalised mailing, including a ‘Facts About the Show’ information sheet.

Compared to a control group, the test group of 200 people made almost five times as many bookings, spent over twice as much in each booking, and generated an income of £12 per head (compared to £1.25 in the control group), spending £2,400 in total.

The scheme cost £600 to run, leaving a net profit of £1,800: for every £1 invested there was a return of £4 in ticket sales. Projected across the entire target group, an estimated profit of £27,000 could be yielded in just three months. (Dunnett 2000)

Loyalty cards

Some museums and galleries are considering a loyalty card scheme in an attempt to find ways of gathering information on visits and visitors, as well as encouraging more frequent visiting. However, there are a number of problems with this sort of scheme for free entry museums. Firstly, card schemes like this are based, in other places, on the concept of visitors saving money in some way. For example, the National Trust membership encourages visitors to visit more often through free / discounted entry, as does the Museumkaart in Holland and the CL1C card at Chapter Arts Centre. Without this incentive, it is questionable how much influence this scheme would have
Audience knowledge digest

Even the nectar card type model of collecting points to be redeemed seems flawed, given that these schemes tend always to be for necessities (groceries, medical / cosmetics, petrol) rather than optional experiences, and are ultimately financially motivated which is perhaps not compatible with the mode visitors are in when visiting a free cultural venue.

Secondly, the most successful models for this are organisations with many sites and various appeals – for example, the Museumkaart gives free access to over 440 museums, the National Trust has hundreds of properties in the UK. We know that frequent museum and gallery goers are omnivorous in their tastes. Therefore, attempting to set up loyalty to one particular venue is a highly flawed proposition for the core regular attenders, and possibly counter-intuitive to their self-image as independent-minded people.

Lastly, this scheme will only, by definition, appeal to repeat visitors and within that only probably the very loyal core who already feel sufficient affinity with the museum brand to buy into the scheme. People will also forget their cards. It is therefore not a reliable way of gathering visitor data or encouraging new audiences. It is a way of increasing frequency from the loyal core of existing visitors.

6.11 The internet

Usage of the internet amongst museum visitors

Significantly more people in the UK are using the internet than not using it, with 53% of people using it at least once a week and 30% using the internet daily. Half of users agree that the internet is now their preferred information resource, with 51% saying it is the first place they would go for information. This means there is an extensive market for authoritative information websites.

There is also a large market for the type of information that museum websites can provide. 59% of users have searched for information in connection with a hobby or interest with a further 3% interested in doing so, 30% are in the market for sourcing information to do with children’s school work, 41% have or would look for information on local services and 40% are in the market for arts-related information. (MORI 2005b) When wanting to find out information about an object, 58% of people said they would use the internet, and nearly four in five of these would go to the website of the museum which owns the object.

Unsurprisingly, visits to museum websites are increasing:
People mainly find websites through search engines (81%), guesswork or recommendations, so it is important that museum websites come up first in searches, have intuitive addresses and are 'top-of-mind'. (MORI 2005b)

Reputation and trust are important factors in the choice of websites used. Significantly, 92% of people felt they would trust information from websites of museums, libraries and archives – the highest rating for any type of website – largely because they trust the organisation. (MORI 2005b)

Overall layout and professionalism of a website’s design is a key factor for users. Reliability of content is also seen as highly important for 92% of users. Quality of content, how up-to-date information is are also cited as important by the vast majority. There is less importance given to links and downloads.

However, usage of the internet appears to be linked to certain demographic characteristics. This means that information placed on a museum’s website is more likely to reach traditional museum audiences and less likely to reach people currently under-represented in museum audiences generally.

- **More likely to use the internet:** Men, people aged 16-54, workers, from classes ABC1, with a formal educational qualification, without children living with them.

- **Less likely to use the internet:** Women, people aged 55+, those who do not work, from classes C2DE, with no formal educational qualification, have children living with them.

Around 15% of the population actively resist using the internet, their non-use stemming from indifference rather than any barriers. However, the remaining non-users could be persuaded to use the web through cheaper and easier access, better awareness and information about what is available on the web (and therefore more publicity about the benefits of using museum websites) and greater confidence. (MORI 2005b)

Research for the Imagine website (Wood Holmes group 2005c) identified the following key factors for a successful museum website:

- Plain English and easy to read
- A balance of images and text
- Able to click on images to see more detail – eg see inside
- Virtual 3D tours
- Interactive

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998/9</td>
<td>4.04 million</td>
</tr>
<tr>
<td>2002/3</td>
<td>38.66 million</td>
</tr>
</tbody>
</table>
Why do visitors use museum websites?

Morris Hargreaves McIntyre has identified the following reasons for visiting a museum or gallery website (Morris Hargreaves McIntyre 2000):

- Teachers researching resources
- Adults planning visits
- Adults looking for follow-up information after a visit
- Families planning visits
- Families / children looking for follow-up information after a visit
- Pupils / students researching projects
- Academics and professionals researching collections
- Speciality shoppers
- Local people finding out what’s on
- Tourists shortlisting places to visit
- Hobbyists and enthusiasts’ self-education and personal development
- On-line reference points within the gallery or museum

Reasons to use internet marketing

British marketers spent £1.4 billion on online advertising in 2005. (Croft 2006)
The potential for the internet to be used for audience development and marketing is enormous:

- Allows the museum to reach audiences not constrained by physical distance, enabling the museum to achieve a global reach (eg online exhibitions)
- Allows the museum to build better relationships with existing audiences.
- Helps visitors plan a more effective visit to the museum.
- Vast possibility for greater interaction and richer experience of the museum through using the museum’s website – membership schemes, online clubs, visitor authored content and other forms of user participation will be integrated in the near future.

Pay per click (PPC)

Marketers bid for the words they think customers will be using to search for their product: the brand that bids the most will be ranked first in the sponsored links section of the results screen. Marketers pay each time a user
carries out a set objective from the link eg booking tickets, requesting more information.

**The White Company**

The White Company (homewares retailer) use pay-per-click as an integral part of their marketing mix – in the first three months of using the method in 2002, clicks through from their sponsored links on search engine results pages generated a 15% rise in online sales. (Croft 2006)

**Site relaunch, London Symphony Orchestra**

When the LSO relaunched its site in 2003, it used paid-for search advertising with google and reciprocal links with other similar sites (Classic FM, BBC Radio 3, Evening Standard). This drove a massive increase in overseas web visits, as well as allowing the LSO to increase subscribers to their email list (by almost half) and boost sales from its independent record label. (Pocketthis 2004)

**Search engine optimisation (SEO)**

This involves redesigning websites so that they are ranked more highly by software programmes used to rank sites by search engines. Specialist agencies provide this service.

**Contextual advertising**

Advertisements are delivered to a user’s computer based on what they are viewing. So someone reading an article about an artist on a newspaper’s site might see alongside it ads for upcoming contemporary art exhibitions.

**Online display**

This is very similar to advertising in a newspaper, the difference being that the advertisements can be animated, contain video footage, be updated in real time and directly drive visitors to other sites by clicking through.

**Online consultation and research**

Increasingly, the internet is being used as a way of finding and consulting groups of consumers. This works particularly well for brands with a loyal core of avid supporters, who can be easily found on related message boards and forums. The web is also being used increasingly for qualitative and quantitative market research with current and potential customers using online surveys and online focus groups – this can be particularly useful in
gathering views from time-poor target groups eg senior professionals who visit galleries.

**New product development, Marmite**

In the recent development of Marmite Squeezy, Unilever used the internet to find Marmite fans who were then given considerable input into the development of the new product. Lego regularly canvasses the views of its fans through its own site and also fan-run sites.

**Online viral campaigns**

Online viral marketing is particularly effective in reaching a younger male audience. It relies on people passing content on to their friends, enabling a message to gain massive amounts of exposure with very little budget. However, this method is very difficult to control – it can generate enormous credibility or backfire, especially if negative associations with the brand are already prevalent. This medium would seem to suit arts organisations and museums – where visitors who have had a positive experience or strong relationship with the venue naturally recommend to friends and family already, and could be encouraged to do this more if they had content to pass on, possibly giving a taster of what they could expect from a visit.

**Find the Phil series, Louisiana Philharmonic**

Designed specifically as a viral marketing campaign for younger adults, the campaign involved small concerts taking place around New Orleans playing unconventional pieces. The location of the concerts could only be found by following a series of clues at www.findthephil.com. Participants are encouraged to forward the clues to friends and everyone is encouraged to register on the site for money off the ticket price. (Brown 2004)

**Engaging content to build customer relationships**

Increasingly, museums and other organisations are developing websites which offer an experience in themselves, either as an extension to or independent from the visit experience. Users are able to access the museum’s resources remotely, interact with the organisation in different ways and often develop a deeper and more mutually beneficial relationship with the organisation as a result.

**Tate Online, Tate**

Tate Online attracts over three million unique visits in 12 months and is the most popular UK art website. It acts as a wide-reaching communications tool, resource on British and modern international art and an entertainment channel in its own right.
The site promotes and extends the offerings at each of Tate's four offline galleries, as well as hosting its own distinct programme including net art commissions, e-learning modules, forums, polls and extensive collection and archive displays.

The site has some interesting user statistics, reflecting the site's status as a valuable resource in and of itself: 34% of users are from outside the UK, 19% have never visited an off-line Tate gallery and 35% visit the site at least once a month. (Rellie 2005)

**Brand repositioning using website, Dulux**

Dulux has used its website (dulux.co.uk) as part of a campaign to reposition its brand as a source of information and design ideas, and experts on creative use of colour. An online campaign drove traffic to the new interactive website, which allows visitors to play around with colour schemes in virtual rooms, save images in a scrapbook and use practical tools eg calculate how much paint they need by entering room sizes. Site visitors spend an impressive average of 14 minutes per visit.

**www.edfringe.com, Edinburgh Fringe Festival**

The Edinburgh Fringe Festival have used a number of tactics to drive people to their site. The URL is carried on shop carrier bags, programmes, and also on press releases meaning that it is often mentioned at the end of press articles. Related websites were supplied with different versions of the Fringe logo suitable for the web, and the team built relationships with news and lifestyle portals (eg bbc.co.uk, timeout.com).

Once users are on the site, they are given reasons to stay for longer and return. It is the only place to hear about launches, late additions to the programme and award nominee announcements. Subscription to the newsletter means this information is delivered even faster, and also includes exclusive offers and competitions with prizes of real value to subscribers – the chance to sit on the judging panel of the Perrier Comedy Award, for example.

The site is database-driven, meaning that it is constantly changing as staff upload new content. The team employ a web content editor during the summer months, who populates the site with up to the minute news and gossip.

The site also encourages user-generated content: users can vote for their favourite show, read and write reviews and use an associated shows mechanism to recommend other shows by analysing previous sales patterns.
numbers increasing steadily despite little ongoing marketing activity, suggesting strong word of mouth recommendation has been generated. Enquiries about the collection have roughly doubled since the website started, with many enquiries connected to Birmingham Stories content.

Audience knowledge digest

('if you like this, try...'). The site also enables each registered user to organise their fringe by creating a personalised schedule of bookings and a wish list. (Reynolds 2005)

**Encouraging dialogue with visitors, Belfast Cathedral Quarter Arts Festival**

Visitors are asked to give feedback about events they have attended via the website, and also to make suggestions for the festival next year. This creates a sense of common ownership and involvement with the event.

For many museums, the starting point for engaging web-based experiences has been enabling access to collections in store via digitisation programmes. However, thought needs to be given to potential users’ motivations, expectations, needs and behaviour when developing these resources – just putting the collections catalogue online will not satisfy any user groups.


The ingenious website aims to bring together images and viewpoints to deliver insight into science and culture. It makes connections between ideas, people and innovations, drawing on the National Museum of Science and Industry to deliver over 30,000 images illustrative over 30 different subjects, topics and debates.

Users are invited to explore the content and contribute to online discussions, creating dialogue between the museum and the public and allowing the museums to build stronger relationships with their audiences. (www.ingenious.org.uk)

**www.birminghamstories.co.uk, Thinktank**

The fundamental user proposition of the website is: 'explore stories about Birmingham’s past and the inventions that changed people’s lives.'

Based on extensive formative, prototype and summative evaluation with visitors, the website encourages people to deepen their engagement with Birmingham’s science and industry collections by following three key themed narratives ('workshop of the war', 'made in Birmingham' and 'great inventions for everyday life') which link objects together. Visitors can use the website as an online resource, as a way to prepare for a visit or to deepen their engagement following a visit.

Birmingham Stories had over 55,000 visitors in its first nine months, with
numbers increasing steadily despite little ongoing marketing activity, suggesting strong word of mouth recommendation has been generated. Enquiries about the collection have roughly doubled since the website started, with many enquiries connected to Birmingham Stories content. (www.birminghamstories.co.uk)

**Consumer generated content**

Futurecasters and industry experts have identified a trend towards personalised experiences (see section X above) and visitors’ desire to participate in activities rather than being passive observers – the success of YouTube is a prime example of this. Visitors are increasingly interested in generating their own responses to what they have experienced and entering into a creative dialogue with organisations.

This interaction and creative input from customers is being harnessed by some organisations to build ‘buzz’ around brands (rather than selling specific products), using loyal brand advocates amongst the core audience. These testimonies from satisfied consumers can be used as word of mouth for potential users, who are interested in what others have to say and particularly if the source is trusted because of shared interests or experiences (Millward Brown 2006b).

Whilst consumer generated content can be risky for controversial brands (e.g. Chevy tried to launch their new Tahoe pickup with a ‘build your own ad’ site which was promptly overrun with environmentalists creating anti-SUV pieces), there is little risk for arts organisations using this technique, as they generally have strong relationships with their customers.

**60 seconds of fame, Orange**

Orange recently ran a short film competition to coincide with the BAFTA awards ceremony. The public were invited to create a 60 second film on the theme of celebration. Entries were then shown on the website (60secondsoffame.co.uk) and the public were able to vote for their favourites. Films were shortlisted by region, with the winner from each region winning tickets for the BAFTA ceremony.

**Converse Gallery, Converse**

Converse encouraged customers to submit 24 second video clips inspired by their trainers. Some of these were selected for use in TV commercials, whilst others can be viewed at the ‘made by you’ section of conversegallery.com. The website also features an ‘around the world’ section which commissions short clips on converse-wearers in different countries. Both of these schemes give
converse wearers the sense of being part of a global gang of creative friends.

**Story booth, JetBlue**

A video diary booth travelled around the US, recording JetBlue customers’ experiences of the domestic airline. Visitors are invited to record their favourite JetBlue moment, can also send a postcard to their friends from the booth and stories can also be recorded via the company’s website.

**Weather Project, Tate Modern**

This project ran from October 2003 to March 2004, to coincide with Olafur Eliasson’s sunset installation in the turbine hall. A site was launched and visitors could buy an umbrella that showed a message containing Tate’s URL when wet. An email campaign drove people to the site and asked them to send weird stories on the weather – 200 were posted, with the content becoming richer the more people interacted. An online survey was also carried out, and an email campaign to 18,000 people was used to attract visitors to the 1am midnight sun event. All this resulted in 89% more visits made to the gallery compared to the same month of 2003. (Pocketthis 2004)

**Shooting Live Artists, Arts Council England / BBC**

This digital broadcasting project explored how live artists could reach new audiences through a combination of internet and other forms of presentation. The most controversial was Skin/Strip Online by Claire Ward-Thornton, Ruth Catlow and Marc Garrett, which invited the public to contribute anonymous photos of their own bodies. There were a huge peak in visits to the website (to over 17,000 per week) after high profile media coverage of the project.

**Downloading and streaming**

Increasingly, organisations are offering multimedia content to download or watch streamed on their website. For arts organisations, this has possibilities
for offering tasters to potential attenders at events, as well as providing
content as an independent resource for visitors.

**The Stage Channel**

The Stage Channel produces and presents high quality promotional clips of
theatre productions, which can be viewed online via the venue’s website,
email marketing campaigns and at www.stagechannel.com. These clips act in
a similar way to film trailers, enabling potential bookers to judge the quality
of the work on offer and level of production before deciding to make their
purchase – reducing risk and increasing bookings. The Stage Channel also has
its own mailing list, whose subscribers use it as an information source in
itself. Seeitfirst.com operates a similar service in the UK.

**Press releases, Folly**

Folly, the digital arts organisation working in Lancashire and Cumbria,
regularly produces news releases in a downloadable format, often containing
moving image clips to showcase the work. (folly.co.uk)

**RSS feeds**

RSS feeds provide regularly updated digital content on a given subject. Users
of RSS (Really Simple Syndication) content use programmes called feed
readers or aggregators, which regularly check any number of web addresses
and provide updates normally in the form of headlines and short descriptions,
each followed by a link to the full story. This is useful for organisations who
want to communicate with a technologically-literate core audience. Around
5% of internet users use RSS aggregators or similar technology (Edelman and
Neillsen BuzzMetrics 2006).

**RSS feed, Derby Playhouse**

The Derby Playhouse offers free subscription to its RSS feed from the
homepage derbyplayhouse.co.uk. This provides subscribers with updated
information from the website.

**Podcasts**

Podcasts are principally a way of accessing automatically updated content,
using RSS feed software. The content can then be played back on personal
computers or portable media players (hence the name, from iPod) consisting
of audio, video and static images. Organisations offering podcasts often also
provide the option to download individual podcast episodes rather than
subscribe to a regular series.
There are many possibilities for this technology in a museum environment – especially for delivery of interpretation within exhibitions. A number of organisations have used podcasting for marketing purposes, either to encourage new visitors to visit or to deepen the relationship with committed core attenders.

**Discover London trails, London Smaller Museums & Galleries group**

The London Smaller Museums and Galleries Group is an informal organisation, set up by the Campaign for Museums to encourage collaborative promotion between small museums in the city. The group developed the first Discover London trails in 2004 with the aim of linking small museums thematically or geographically with a larger landmark. The GLA and MLA London now also support the scheme, which is now in its third year.

There are eleven Discover London Trails downloadable in pdf form from the Discover London website. In 2006, two trails were replaced with new ones and six podcasts were commissioned by the Mayor’s Office, voiced by celebrities including Trevor MacDonald and Adam Hart Davies.

Whilst it is difficult to measure the number of visits to the participating venues driven by the guides, the download figures give an indication of the popularity of the materials. A total of 6,912 trails were downloaded from the main 24 Hour Museum site in April and May 2006. There were 7,182 downloads of the six enhanced podcasts were downloaded, with 3,025 audio-only downloads. The podcasts reached number 5 in the itunes Society and Culture top 20.

(London Smaller Museums and Galleries Group 2006)

**Podcasts, National Gallery**

The gallery offers a new podcast every month, available to download for free from their website with or without images. The podcasts contain discussions by curators, competitions and articles on a range of the gallery’s activities, including tasters of upcoming exhibitions. For example, in the March 2007 episode, curators Chris Riopelle and Colin Bailey explain why visitors to the ‘Renoir Landscapes’ exhibition will encounter a more experimental artist than they might expect. The winner of our competition to create a sound-piece inspired by a painting in the Gallery is announced – artist Jon Hall chose Pissarro’s snowy London landscape, ‘Fox Hill, Upper Norwood’, and sets up his easel on the same suburban street that inspired the French painter back in 1870. And the podcast goes to Bristol to visit the National Gallery’s touring exhibition, ‘Work, Rest & Play’, and hear how artists have captured changing patterns of work and leisure over the past 400 years. Plus a special bonus track for a taste of the ‘Renoir Landscapes’ exhibition before you arrive at the
Podcasts, San Francisco Museum of Modern Art

The podcast for SFMoMA won the 2006 MUSE award – the highest US honour for museum media and technology. As a relatively new content delivery vehicle, podcasting provides additional options for conveying educational and interpretative messages in gallery.

However, the technology is also being used to strengthen links with key audiences by creating engaging, professionally-produced content for distribution to online visitors. The museum (with Antenna Audio) has developed a series of audio and audiovisual broadcasts, with the podcasts lasting between 5 and 15 minutes. Themes include: news about upcoming events and exhibitions, archival audio, interviews with artists and curators, original music compositions, poetry readings, audience feedback or audio tours of specific objects. (Heritage365, 04.06)

Social networking sites

These sites, of which MySpace.com is the most popular, allow people to connect with other individuals with similar interests, and to find out about new things through viewing others’ profiles and sharing information. Most services also allow users to create blogs, upload music, video and images to share.

Although much has been made of the significance of these sites as an indication of the increasing importance of social networking on consumers’ decision-making, there are relatively few examples of organisations successfully using this tool to market goods.

Social networks are not good channels for pushing messages at consumers, and instead marketers could be using them as a forum to stimulate and disseminate consumer-generated content and position itself as connected to users – mostly young people at the moment.

MySpace, Urbis

Urbis has a myspace profile. The site is used to communicate with organisations and individuals (524 friends), provide information on Urbis’ general offer and temporary events and is maintained by some of the staff at Urbis (and therefore described as ‘official but unofficial’).

The site helps Urbis to maintain its position as part of Manchester’s various informal social and creative networks, and to position itself as a young, energetic and dynamic organisation. (http://profile.myspace.com/index.cfm
Blogs

A blog is a user-generated website where content is in the form of a journal, normally displayed in reverse chronological order. Blogs often provide news and information on a specific topic or can be very personal online diaries. A number of blogs have become very popular with a fairly mass audience, although blogs are perhaps most useful in superserving niche audiences on particular subjects. Beyond the popular, high-traffic blogs there are millions of bloggers writing for just a handful of readers – the so-called ‘long tail’ of blogging. Users can also use RSS aggregators (see above) to keep up to date with their preferred blogs.

There are various opportunities for arts organisations in this area, although a blog written by the organisation is likely to be a tool to engage existing loyal audiences and deepen relationships rather than attract new users: without significant investment in advertising to drive traffic to your blog, few people will ever find it. However, 12% of internet users have posted comments or other material on blogs (Edelman and Neilsen BuzzMetrics 2006), so there is a sizeable market for the right content. Perhaps a blog written by someone within the organisation with an interesting perspective – artist in residence for example – might engage users.

Aside from creating a blog itself, the blogosphere can be useful to arts organisations in a number of ways (Edelman and Neilsen BuzzMetrics 2006):

- Research and insight: Blogs can serve as good sources for up-to-date information and ideas due to their quick syndication and search-engine reach.
- Word of mouth identification, tracking and analysis: Searching blogs can give speedy information about how your brand is being received by users. Watching the online exchange of points of view on your products can be very revealing. Sites like technorati.com provide easy ways of finding out who is saying what about your brand right now.
- Advertising and effectiveness testing: Some brands have launched blogs as ads, but you can also gauge how warmly a campaign is being received via blogs.
- Early warning radar: When corporate reputation or visitor dissatisfaction issues emerge, you can pick up the warning signs and take action.
- Extension of relationship marketing: Relationships with passionate consumers can be nurtured and discussion encouraged.
Audience knowledge digest

- **Stakeholder and corporate communications**: Blogs can give a human voice to a company, with employee blogs establishing relatable identities for organisations. Feedback devices and dialogue with other organisations and end users can be set up via blogs.

- **Targeted marketing**: Blogs can open up new advertising space through keyword buys and contextual ad buys.

- **Multimedia information sources**: Blogs at the moment are mostly text-heavy, but have the capacity to become rich media sites means they will become good sources for consumer-generated content.

- **Thought leadership**: A corporate blog or employee participation in others’ blogs can raise a company’s reputation as a leader in a specific market or industry.

**Email**

Core audiences are increasingly favouring email as the main way of keeping in touch with their favourite arts organisations, trusting the information contained and valuing the contact.

Around 50% of arts patrons in the US say that they read opt-in emails ‘all the time’, with just over half saying they read it ‘occasionally / maybe’. Only 5% delete opt-in email without ever reading it. Therefore, around half the email list is probably paying attention to any given email message you send – very effective compared to most other communications channels. Recipients also extend the life of received messages by forwarding to friends (60% have done so in the last month), storing the information to act on later (around half do this) and printed out to keep for reference (45%). (Carr 2005)

Over a third of US subscribers to arts email lists say that when they sign up, they expect to hear from the organisation on a weekly basis, and virtually all want something at least monthly. (Carr 2005)

**Emarketing strategy, The Lowry**

In 2002, the Lowry decided to develop a holistic emarketing strategy which could be used across the organisation, including online booking for Lowry patrons.

Central to this is the mylowry element of the website, which encourages visitors to the site to register, identify they interests and sign up to regular email updates. The advantages to subscribers are advance notice about new shows and various email offers. These benefits are promoted via offline marketing, with all marketing communications designed to drive traffic to the website. The organisation appointed a dedicated member of staff to look after the website, ensuring it is up to date at all times and responding to queries.
Mylowry has over 10,000 subscribers, and a recent Dave Spikey show almost completely sold out from a low-cost email to the list, saving money on traditional marketing activity. Within three weeks of the launch of online booking, 12% of box office income was generated online. Interestingly, this has been particularly effective in generating new bookers – 61% of online bookings are made by people who have never booked before, compared to 32% through telephone bookings, suggesting that offering online services has actually helped to grow the audience. (MacGregor from www.a-m-a.co.uk)

6.12 Mobile marketing

There are now around 122 mobile phone contracts for every 100 Britons (Croft 2006). There are many attractions to using mobiles for marketing the arts – a combination or pinpoint targeting (of people, time and location) and ability to create interactive, experiences and relationships with users is ideal for the sort of messages arts organisations want to communicate to users.

However, straight forward advertising on mobiles has several limits. First of all, most users are resistant to mobile advertising – there is a widely-held belief that ‘their mobile belongs to them, not to the service carrier and certainly not to advertisers’ (Millward Brown 2006a). Even young people are not keen on seeing adverts on their phones compared to their receptiveness to seeing adverts on other new or traditional media. Millward Brown have found that consumer acceptance of mobile advertising is always conditional – people will only tolerate it if they get something in return.

Secondly, it is currently a challenge to create and distribute mobile adverts due to lack of shared standard across devices, networks and content providers, and a lack of database knowledge at service provider level to target individual users. TV-style adverts might never make it to mobile devices – sponsorship of shows is more likely (Millward Brown 2006a).

Thirdly, whilst it is legal to call someone on their mobile without permission for marketing purposes, recipients are unlikely to react well to this.

For arts organisations, mobile marketing could play a part in a wider customer relationship marketing strategy, with personalised opt-ins for information updates, offers and other content.

Mobiles can also be integrated into other campaigns which encourage dialogue and deeper relationships, including participatory projects and those that rely on users’ responses.

Share Your Secret, Secret deodorant
Secret deodorant recently ran a mobile campaign called ‘Share Your Secret’ - for one day, secrets texted to a short code posted in Times Square were displayed on the Reuters sign. (Millward Brown 2006a)

Text 0403 Warren, Virgin Mobile, Australia

In 2003, Virgin mobile launched an integrated TV, radio, internet and text campaign. Warren, a loveable loser in search of a dream date, was designed to grab the attention of price-sensitive, brand-disloyal teenagers. The campaign succeeded because it advertised a relevant benefit (keep in touch with your social network for less) with a relevant theme (the search for true love) whilst also using humour. Viewers of the TV adverts featuring Warren’s heart-to-heart appeal could text or call to receive a response sending them to the website. In ten weeks, ‘Warren’ received over 600,000 texts and calls and over two million hits on the website, plus positive PR coverage. The interactive element not only engaged customers, but also helped to increase familiarity with the new text service.

Text messaging

Like email, SMS text messaging is an opt-in communication channel.

With online services now available from mobiles, users are increasingly being offered local or geographic based search services, where users can find visitor information from the mobiles including maps and directions.

Use of MMS and SMS, National Gallery

The National Gallery’s entire collection is available to mobile picture phone users, who can send any part of the gallery’s entire permanent collection to their phone by clicking on a ‘send to mobile’ link on the collections page of their website. Each image is accompanied by information about the painting and there is a zoom facility. Images can be forwarded and information downloaded. (Pocketthis 2004)

Basic visitor information is also available to be texted to mobiles from the website (opening hours, directions, contact details).
Text campaigns have been tested most successfully in targeted communications to young people.

**Txtm8: South West Arts Marketing**

This project aimed to market a range of events in Plymouth to 18 to 24 year olds using SMS technology, working with a range of arts and leisure organisations in the city. The objectives of the project were to: sell unsold capacity in venues; test SMS technology; increase awareness of the organisations amongst this age group; and build a database of contacts.

The scheme was branded 'Txtm8 – the free information service that keeps you in the now [sic]'. The steering group developed a visual identity and website alongside designers and a local lifestyle magazine aimed at the target market who also hosted the page.

Subscribers were collected using cards distributed throughout the city in clubs, shops, art venues, colleges and universities and a full page advert in the local lifestyle magazine.

A high profile launch was held in the city centre, which generated local and national media coverage. This event was supported by leaflet distributors, who explained the project and helped to allay worries about data protection and scam issues.

Joining up was incentivised by a prize draw for mobile phones and top up credits. The cards were mailed to a freepost address, and coded to enable the team to monitor pick up rates from each venue. Members could also register online.

Once registered, members received a welcome message suggested that they pass the message on to friends. Users then received no more than three messages a week from the organisations, sent to phones and / or email addresses. Messages were sent at the time when people were making their leisure time decisions – eg end of college day, Friday early evening.

Venues could choose target messages to those interested in them, as users had indicated their interests and age on the registration cards – eg 35-44 year old live music attenders for a Paul Weller competition. The project also tried to encourage cross art form visiting, with discounted tickets available to try new genres. For example, an offer of discounted tickets to Catwalk by Nitro Theatre Company (a non-traditional theatre production featuring a club soundtrack) was sent to people who had selected 'clubbing' but not 'theatre' as an interest – one in twenty of recipients took up the offer. Txtm8 also offered people interested in clubbing but not arthouse cinema discounted tickets to see 'Biggie and Tupac' at the Plymouth Arts Centre – all those attending using the
Central Saint Martins College of Art & Design and used bluetooth technology was used to collect and transmit orchestral sound. 56 colourful plastic cubes and three hotspots were laid out on the Royal festival Hall terrace on a full orchestra size stage. When visitors sat on a cube or stood in a hotspot the sound of the instrument in that position in the orchestra was automatically activated as part of a piece of music. The more people seated, the more layers of the score were revealed. Free classical music ringtones were also available. Audience knowledge digest were new to the venue.

The scheme was particularly successful in attracting men, perhaps due to the use of relatively new technology. Unsurprisingly, prize draw type messages got the biggest responses. Although there was not a large take up of any individual offer, the scheme overall was successful in attracting new attenders, including friends of subscribers.

Evaluation shows that this method was effective in attracting young people to the venues by using a trusted brand to build awareness and target products to the relevant audience.

**Short-range mobile marketing**

Bluetooth technology (which uses a short-range radio frequency) is being used increasingly in marketing due to its capacity to reach a group of people at one location, transmitting content without the expense or limitations of using a particular mobile network. This is permission-based – recipients must give explicit consent prior to any unsolicited marketing message being sent. Specific environments where this medium might be useful include places where paying customers are within a particular closed environment (eg a cinema, theatre or museum) so long as there is an effective and obvious means to opt out and the soft opt-in made by purchasing a ticket is obvious to visitors. Bluetooth-enabled phones can be tagged with a specific name, which can then be detected by the transmitter and taken as permission to send content. Low power transmitters can be used – with a range of just a few metres, so that a user would have to walk right up to the poster or transmitter to receive the content, giving implied consent. However, this would be difficult in open public spaces.

*Macmillan Children’s Books* promoted 'Teen Idol' by Meg Cabot with Hypertag interactive posters, aimed at the 10-14 year old girls market. Hypertag is a Cambridge-based company which has developed a system to transmit content to mobiles. Girls viewing the poster could point and click their mobiles at an interactive poster to enter an instant win competition, with prizes including a shopping spree, lip balms and screen savers. The posters were placed near MacDonalds in key regional towns. Over a two week period, more than 2,000 mobile users interacted with the ads. (Croft 2006)

**PLAY.orchestra, South Bank Centre**

During summer 2006, people passing the South Bank Centre had the opportunity to join the first ever virtual orchestra. The project was a partnership between the South Bank Centre, Philharmonia Orchestra and...
Central Saint Martins College of Art & Design and used bluetooth technology was used to collect and transmit orchestral sound. 56 colourful plastic cubes and three hotspots were laid out on the Royal festival Hall terrace on a full orchestra size stage. When visitors sat on a cube or stood in a hotspot the sound of the instrument in that position in the orchestra was automatically activated as part of a piece of music. The more people seated, the more layers of the score were revealed. Free classical music ringtones were also available to download on Bluetooth mobiles. (Heritage 365, 04.06)

**Album promotion, Coldplay**

Coldplay’s X&Y album was promoted via a free Bluetooth download promotion. Adverts were screened on giant Transvision screens at six London mainline train stations, which told passers-by to switch their BlueTooth receivers to get the free content. The system detected mobiles within a 50 to 100 metre radius of the screens and sent a range of clips and song samples to opted-in mobiles, along with the option to buy material via the ‘Coldshop’ wap site. Out of more than 87,000 mobiles detected, 13,000 people requested the material – a response rate of nearly 15%. The numbers gathered were used in the ongoing marketing of the album. (Farey-Jones 2005)
Measures of success

7.1 Satisfaction

All the North East hub venues have satisfaction scores above the national average (98% on average, compared to 96% national average), with the Discovery museum scoring particularly well. (Ipsos MORI 2005)

19 visitors in every 20 to North East museums and galleries enjoy their visit. (Ipsos MORI 2005)

Whilst measures like this are the main way that museums and galleries currently measure the quality of the visit experience (most other measures are of quantity). However, Morris Hargreaves McIntyre have found that the highest satisfaction rating are given by those visitors who are the least knowledgeable, lease experienced, are on their first visit, spent the least time visiting and are least likely to return. Conversely, those who are knowledgeable, experienced, regular visitors who spent the longest time engaging with the objects and who are most likely to return gave lower satisfaction ratings.

This phenomenon is easily explained: visitors’ satisfaction is relative to their expectations. Those who expect the least are more easily satisfied. Those with higher expectations can see more potential for improvements. Satisfaction is therefore not a particularly useful measure of visit quality.

7.2 Attitudes post visit

Nine in ten visitors to museums and galleries in the North East (91%) agree that the venue they went to is an exciting place to visit, above the national average (83%). The Discovery Museum and Beamish score higher than other venues on this. (Ipsos MORI 2005)

Three in five visitors to museums and galleries in the North East feel inspired by their visit. (Ipsos MORI 2005)

Two thirds think that the museum or gallery is a good place to meet friends. (Ipsos MORI 2005)
7.3 Against motivation

Morris Hargreaves McIntyre regularly measure the outcomes visitors get compared to their motivations - which are effectively their minimum expectations for a visit. The results below show visitors' expectations of a visit to the museum and outcomes for a high profile temporary exhibition at a major national museum:

Spiritual: 2% expectation, 16% outcome  
Emotional: 24% expectation, 41% outcome  
Intellectual: 53% expectation, 32% outcome  
Social: 20% expectation, 10% outcome

The results show that the outcomes of the exhibition far outstrip visitors' expectations of the museum. Almost half engaged with the exhibition on a spiritual level. The higher up the hierarchy, the greater the engagement and the more profound the outcome. And unlike the usual measures of satisfaction, this measure verifies the quality of the experience and even explains how they engaged.

7.4 Exceeding expectations

More than half the visitors to museums and galleries in the North East (56%) have a better experience than expected. This exceeds the national average (50%). Visitors to the Discovery Museum are more likely to agree with this: 63% feel their visit was better than expected, with 33% feeling it was much better (Ipsos MORI 2005). Again, this is something that could be measured more precisely and in more detail by comparing expectations to outcomes.
Why are non-visitors staying away?

Museums and galleries in the North East are performing well on attracting PSA2 target groups, with 7% of visits made by these visitors. These are visitors who have not visited any museum in the last 12 months, who are also either from C2DE social grades and/or Black and minority ethnic backgrounds.

The North East venues are also performing well against the new PSA2 group – which now includes all visitors (not just ‘true new’ visitors) and people with a disability or long-term illness. 39% of visitors to North East hub venues come from this group, above the national average of 39%.

8.1 General profile of non-visitors

The higher an individual's social class, household income and education level, the more likely they are to visit museums, galleries and other cultural attractions (apart from theme parks and zoos, which appeal equally across social classes). People with a household income of over £30,000 are twice as likely to have visited as those who earn less than £17,500. People with a postgraduate qualification are three times more likely to visit than those with no formal qualifications. (MORI 2004)

Almost everyone who has visited a museum or gallery in the last 12 months is extremely likely to visit either the same venue or a similar one during the next 12 months (MORI 2004).

The main reason for visiting a museum or art gallery is subject matter of interest to the individual. (Ipsos MORI 2005)

The majority of people think it is important for their local town or city to have its own museum or art gallery. This includes a substantial proportion (76%) of those who had not visited during the past 12 months. (Ipsos MORI 2005)

In Developing New Audiences for the Heritage (PLB 2001), the following groups were identified as ‘missing’ audiences for museums and galleries:

- Pre-school children
- Teenagers
- Young adults
- Young professionals
- Families with babies/ small children
• Older people
• Disabled
• Rural dwellers
• C2DE socio-economic groups
• Unemployed
• Socially disadvantaged
• People lacking basic skills

8.2 Barriers to attendance

The DCMS (DCMS 2000) identifies the barriers to museum visiting as:

Institutional: barriers created by museums and their staff that discourage usage by certain people or sections of the community:

• Unsuitable or unduly restrictive opening hours, or restrictions upon the availability of services
• Inappropriate staff attitudes and behaviour
• Direct and indirect discrimination
• Inappropriate rules and regulations
• Charging policies that disadvantage those on low incomes
• Acquisition, exhibition and cataloguing policies which do not reflect the needs or interests of the actual or potential audiences
• Lack of signage in buildings, so that people cannot easily find their way around
• Lack of sense of ownership and involvement by the community
• Lack of adequate provision of services or facilities for people with disabilities

Personal and social: possible causes of social exclusion experienced by individuals, or as a result of cultural or community circumstances:

• Lack of basic skills in reading, writing and communication
• Low income and poverty
• Lack of social contact
• Low self esteem
• Lack of permanent fixed address
**Perceptions and awareness:** the notion that museums are ‘not for us’ exists in both community and individual terms. This perception causes difficulties for:

- People who are educationally disadvantaged
- People who live in isolation from wider society
- People who don’t think museums are relevant to their lives or needs
- People who lack a knowledge of facilities and services, and how to use them

**Environmental:**

- Difficult physical access into and within buildings
- Problem estates and urban decay
- The isolation experienced by people in rural communities
- Poor transport links

Dodd and Sandell’s barriers to museum and gallery usage (Dodd and Sandell 2002) is a socially based analysis of non-attendance:

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Issues to consider</th>
<th>Possible approaches to audience development</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physical access</strong></td>
<td>Is our building physically accessible? Is it open at times which suit different audiences?</td>
<td>Installation of ramps, handrails and seating</td>
</tr>
<tr>
<td><strong>Sensory access</strong></td>
<td>Can our exhibitions, events and facilities be used by people with hearing or sight impairments?</td>
<td>Objects which can be touched Varied means of interpretation eg taped guides, subtitled av presentation etc</td>
</tr>
<tr>
<td><strong>Intellectual access</strong></td>
<td>Do our displays exclude people with limited prior knowledge of the collections or artists on show? Can people with learning disabilities access services?</td>
<td>Consult and involve new audiences in the production of exhibitions Evaluate the level of understanding amongst a range of audiences when developing exhibitions</td>
</tr>
<tr>
<td><strong>Financial access</strong></td>
<td>Does our admission fee deter people with low incomes? Do our shop and café sell items that families can afford?</td>
<td>Free admission on certain days and publicise it widely Take the gallery into the community Provide free transport Admit schools and community groups free</td>
</tr>
<tr>
<td><strong>Emotional / attitudinal access</strong></td>
<td>Is our gallery environment welcoming to new visitors? Does our staff have open attitudes to diversity? Is the style of publicity inclusive or exclusive?</td>
<td>Staff training Special events and activities to build confidence amongst new audiences</td>
</tr>
<tr>
<td><strong>Access to decision making</strong></td>
<td>Does our gallery consult potential new audiences and value the input of external stakeholders?</td>
<td>Develop projects in partnership with audiences Establish a consultative panel</td>
</tr>
</tbody>
</table>
### Audience Knowledge Digest

<table>
<thead>
<tr>
<th>Type of access</th>
<th>Issues to consider</th>
<th>Possible approaches to audience development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to information</td>
<td>Does our publicity effectively reach, and communicate with, new audiences?</td>
<td>Develop new / accessible marketing networks and methods of communication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Publicity and orientation in large print / tape / Braille / different languages etc</td>
</tr>
<tr>
<td>Cultural access / representation</td>
<td>Do our collections, displays, events reflect the interests, life experiences of our target audience?</td>
<td>Proactive collecting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Special exhibitions and events</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Redisplay with appropriate interpretation</td>
</tr>
<tr>
<td>Technological access</td>
<td>Does our use of new media facilitate rather than hinder access for our audiences?</td>
<td>Use of assistive technologies</td>
</tr>
<tr>
<td></td>
<td>Do we exploit new advances in technology to enable access</td>
<td></td>
</tr>
</tbody>
</table>

Other studies echo barriers identified by DCMS and Dodd and Sandell:

**Physical barriers**

- Physical access is named as a barrier for one in ten non-visitors, with 10% of non-visiting respondents saying lack of transport / I can’t easily get to it as a reason for not visiting (DCMS 2006b), with 11% mentioning difficulty in getting to or around museums and 7% citing distance (MORI 2004).

- Physical i.e **disabled access**, people with prams, cost, travel, childcare and access to public and private transport.

- **Lack of awareness** that a museum exists or a limited awareness of the range of experiences offered by a visit to museums. (Desai and Thomas 1998)

- **Information gaps** - how to get to a museum, opening times, suitability of content, facilities for families, where to find information.

- **Lack of facilities** eg for people with physical and sensory disabilities, resources that do not cater for particular groups or minority communities and facilities for young children and toddlers (Robertson Bell Associates, no date).

- **Cost** is a barrier but ‘short term initiatives such as free or cheap tickets, have little long-term effect and cannot be the basis for a relationship with an audience for whom price is a genuine obstacle to participation’ (National Campaign for the Arts, 1999)

  Financial access is named as a factor by one in eight non-visitors (12%) – specifically admission charges, despite the fact that many museums do not charge for entry. This is most common amongst DE non-visitors, suggesting that just communicating free entry to this target group would encourage more visits from this target segment. (MORI 2004)
• **Management ethos** eg inappropriate staff attitude, inappropriate rules and regulations, inadequate staff training to address groups with specific needs, inadequate organisational practice, direct and indirect discrimination by management, other users or wider society.

‘Management ethos has the most detrimental effect upon; low income households, socially disadvantaged/low achievers, people lacking basic skills, ethnic minorities, teenagers, unemployed, disabled and C2DE socio-economic groups’ (PLB Consulting 2001).

However, cultural access and welcome did not stand out as significant barriers, with ‘don’t make people like me feel welcome’ only attracting 1% of responses. (MORI 2004).

**Perceived lack of relevance**

• Moore’s study in Ireland identifies five barriers; financial, practical, social, physical and cultural: ‘people living in poverty were unlikely to attend even those events which were free... The **social and cultural barriers** are the most difficult to remove ...the arts are inaccessible, therefore irrelevant.’ (Moore 1997)

• Cost and inconvenience mask a more deep seated discomfort with the arts. Lack of interest, i.e. museums and galleries do not house collections that are relevant, people have **stereotypical ideas** about what a museum is, a bad experience of an earlier museum trip informs an opinion and deters from further visits to other sites (Northern Campaign for the Arts 1999).

• Only for ‘boffins’ i.e. people with specific interests (Trevelyan 1991).

**Lack of confidence**

• The **perceived risk** of attending an arts event against other forms of entertainment for non-attenders is very high; 60% of non-attenders in London stated that they did not like going to see things that they did not know much about (Harris Research Centre 1993).

• **Fear of not understanding** – those people who do not think they will understand what they are seeing are more likely to believe they will find the trip boring, ‘Some people believe that museums and galleries require specialised knowledge, e.g. history, context, and importance of exhibits, how and why they were created and what stories about the past they embody’ (Trevelyan 1991).

• ‘[Some] people are ‘socialised’ into visiting museums ...they have been almost pre-destined (by family and education) to visit because they have been **socialised into accepting the value** of such cultural institutions from an early age.’ Those that have not experienced this socialisation process do not view museums as part of their life (Davies 1994).
8.3 Social class

As detailed above, social class seems to be the most significant factor in determining whether or not people visit museums and galleries.

Those in lower social classes who do not visit museums and galleries tend to say that they have no interest in this type of place or find them boring (37% said they were 'not really interested' compared to 29% of ABC1s). Non-visitors in the higher social classes are most likely to say that they do not have the time to visit (32% said this compared to 22% of C2DEs) (DCMS 2006c).

Glasgow has a penetration of 73% into the market for art gallery visits, compared to Edinburgh (60%) which has more ABC1s and more galleries. A culture of egalitarian gallery visiting, high quality, popular collections (eg. Burrell Collection) and the legacy of City of Culture have all helped.

8.4 Cultural identity

Burns Owens Partnership (BOP 2005) draw attention to a range of factors that act as barriers to prevent wider participation by minority ethnic communities. These include:

**Personal and social issues:** for example lack of basic skills; low income; direct and indirect discrimination; racism; lack of social contact; social pressures; low self-esteem; language barriers; lack of time.

**Perceptions and awareness:** for example, lack of knowledge about available services; perception that services are of limited or no relevance; lack of interest; fear of not understanding; fear of not 'belonging'; lack of understanding.

**Environmental:** for example, access into buildings; physical/geographic isolation; transport; colonial architecture and imagery.

**Staffing:** the need for the community to see itself reflected in the workforce of its museums, libraries and archives.

They go on to point out that many of these reasons given for non-attendance are the same as those given by white non-attenders. Cost, lack of interest, fear of not of understanding are all factors and attitudes that correlate closely with socio-economic groups. The issue is not so much about ethnicity as class. Museums tend to attract middle class, employed people.
There is mounting evidence that social grade is the main underlying factor in exclusion of people from black and minority ethnic backgrounds. Those groups that visit museums least are also those who are most socio-economically disadvantaged. For example, Pakistani and Bangladeshi origin are particularly disadvantaged compared with white people. This group had the lowest incomes on average of any of the main ethnic groups, with the majority of people from these ethnicities in C2DE groups. People of Black origin are also relatively disadvantaged compared to Indian and white populations, with the majority being in C2DE social grades. Pakistani and Bangladeshi people are much less likely to visit museums than those from an Indian background (Bridgwood et al, 2003b).

There are however barriers that do relate to ethnicity. These include lack of publicity material relating to participants cultural and religious identities, and attitudes towards the interpretation of culture and history in museums and galleries (often viewed as exclusive, elitist or colonial). Also research shows that members of minority ethnic groups were ore likely to state that museum and galleries did not meet their needs because of a lack of relevant content, language barriers, and the ‘persistent use of negative images of communities’. Attitudes towards the sector also varied within and between different minority ethnic groups, with factors such as age, gender and religion influencing behaviour.

A qualitative study into ethnic minorities and the arts (Jermyn and Desai 2000) found that while Black, Asian and Chinese communities were not interested in mainstream arts, they were nevertheless highly involved in arts related to their own cultural heritage. Jermyn and Desai went on to conclude:

‘The widespread attendance and active involvement in these arts demonstrates that ethnic minority people are not “alienated from the arts” generically but many were less likely to attend mainstream arts since they believed these did not relate to their experiences, lives and artistic traditions.’

We can infer from this that lack of culturally relevant subject matter is also a major factor in non-attendance of museums by people from BME backgrounds.

Interestingly, young people come up with a similar range of barriers – what they associate with culture is often not reflected back to them in museums and galleries. The issue then becomes one of whose definition of culture are prioritised groups being invited to engage with and the importance of widening this definition to embrace diverse cultures.

Bollywood, Sunderland Museum and Art Gallery

The recent Bollywood exhibition at Sunderland Museum and Art Gallery shows
that culturally specific subject matter has the potential to attract specific minority ethnic communities. 15% of visitors to the exhibition were from Black or minority ethnic backgrounds (compared to 2% normally) and 12% Asian or British Asian (compared to 0.3% normally). All of these Asian respondents said they intended to visit the gallery again, with eight in nine agreeing that the exhibition gave a positive message about South Asian cultures, and the majority (15 of 18) agreeing that Sunderland Museum and Art Gallery valued their heritage and culture.

Desai and Thomas (1998) and Trevelyan (1991) both identify the following particular barriers for people from Black and minority ethnic backgrounds visiting museums and galleries:

- Black and South Asian people in particular felt that few museums contained displays which related to their cultural backgrounds.
- Many Black people felt that the contributions made by their community to British society were ignored.
- Lack of racial representation inhibits attendance and sensitivity to where artefacts are derived and presents a colonial view of history.
- Some people from BME communities felt images of their homelands were often negative and they were keen to seen positive presentations to redress this balance.
- Some people from BME communities considered the interpretation of the past was colonial and biased rather than accurate.
- Access to information about museums and galleries and interpretation contained within the venues was difficult for people who spoke little or no English.
- Some Black and Asian visitors felt unwelcome in museums – these feelings were also found amongst young people and other potential visitors.

**SEMLAC** has designed a set of guidance sheets to assist museums in developing their work with ‘diverse’ audiences in the broadest sense.

**EMMLAC** has produced a series of guides to support museums in their audience development work.
Renaissance in the regions identified creating a more diverse workforce as a priority. The Museum Association’s Diversify! Positive Action Trainee programme provides targeted traineeships for BME individuals and is funded by MLA.

NEMLAC have developed a strategy to address cultural diversity issues. Seven inter-connected strands form the strategy, which complements NEMLAC’s operational plan. The strands are designed to inform practice at every level to facilitate mainstreaming (REFERENCE)

The V&A has produced a strategy for access, inclusion and diversity. The programme included a discussion of the barriers to access, namely emotional, financial and cultural. The HLF-funded project Cultural Diversity at the V&A aimed to sustain and attract interest from black and minority ethnic communities, and has staged a number of large scale exhibitions and installations which are culturally relevant to minority ethnic communities, including Encounter: the meeting of Asia and Europe 1500-1800 and The Art of the Sikh Kingdoms.(REFERENCE)

Bristol Museums Service noticed that members of black community groups felt that the city did not acknowledge its role in slavery. Open meetings were held where different groups could talk about how they would like slavery to be presented and acknowledged. An action group – consisting of councillors, members of the black community, museum officers and academics – looked at how the story could be told accurately. Three different projects were set up as a result. Front-of-house were given training by a community activist and the director of Bristol Race Equality Council after expressing their concern about the exhibition. Interpreters from the African community worked in the gallery,
8.5 Families

The single most important issue for families is the view that the arts in general are not perceived as ‘family entertainment’. Families have a particular set of needs that must be met before they choose to visit museums and galleries. Research undertaken by Morris Hargreaves McIntyre (Morris Hargreaves McIntyre 2001b) and Harris Research Centre (Harris Research Centre 1993) found that families were concerned that:

- Children would not be made welcome in a museum or gallery and they would disrupt other visitors
  
  ‘Children by their very existence are noisy things ....It doesn’t bother me but I think it might bother other people and that is the perspective I have’ (Morris Hargreaves McIntyre 2001b)

- There would not be enough to entertain and engage children and the family as a whole
  
  ‘Lack of activities to engage the child when you get there – children don’t just like looking, they want to get involved’ (Morris Hargreaves McIntyre 2001b)

- Museums and galleries are not perceived to offer a day out, in terms of the activities and facilities available

Other studies of family behaviour identify the need for participation, involvement and engagement, physically, intellectually and emotionally:

- Interactive displays – ‘Children liked to make things happen and see what was going on’ (Morris Hargreaves McIntyre 2001b)

- Family events – ‘This could get round the parental concern that their children might be too boisterous for the quiet atmosphere of a museum or that they might get bored’ (Morris Hargreaves McIntyre 2001b)

- Content and collection as well as the style of delivery are the key success factors. Museums whose displays ‘brought the past to life’ are popular with parents and children, eg reconstructions of rooms or houses as they would have been, displays which showed things working such as engines at industrial sites and staff in character or in period costume (Desai and Thomas 1998).
8.6 Young people

Young people (aged 15-24) are most likely to say that they did not visit because there is nothing in particular they would want to see (27%) or because museums are boring (15%) (MORI 2004). Young people feel that museums and galleries hold nothing of interest and are dull and uncomfortable. (Fowle in Harland and Kinder 1999)

- Displays are perceived as 'static' (Fowle in Harland and Kinder 1999).
- Museums are seen by the young as ‘mazes’ with poor signage and orientation (Fowle in Harland and Kinder 1999).
- 15-19 year olds had a negative association that the arts were primarily for older, middle class people and 'uncool' (Harland and Kinder 1999).
- The arts are not perceived by young people to be a good night out, value for money nor an enjoyable social event (Harland and Kinder 1999).

A variety of commercial studies have been carried out into the young adult market. Principal trends in the outlook of young people can be characterised as follows (Morrison, D. 2000):

**Market Savvy**

Today’s young adults are acutely aware that they are a highly desirable target market. In a time when advertising has infiltrated pop culture, twentysomethings are well versed with the dynamics of marketing and sales: they've “been there, done that”. Don’t be fooled... the market may look naïve, but it’s composed of highly experienced and enlightened consumers.

**Cynical**

Having been touched by crime, AIDS, drugs, corporate downsizing, and an endless parade of political scandals, twentysomethings expect to be mugged by marketers. (Sad, but true.) Product claims are instantly interpreted as hype and greeted with intense skepticism.

**Rapidly Evolving**

Young adults are evolving at warp speed in language, lifestyle, usage, consideration set, and attitudes. What’s cool today, may be passé tomorrow: brands can become obsolete faster than a speeding train.

**Time Crunched**

Young adults live in an accelerated culture where time is a precious commodity. No matter what their age or socioeconomic status, they are struggling to balance work and leisure. Products and services that deliver increased productivity or improved quality of life will be duly rewarded.
**Adventure Seeking**

With the advent of the Global Village, young adults are taking full advantage of what the world has to offer in music, food, culture, fashion, travel, ad infinitum. They love to "adventure seek" and have the financial resources to do so.

**Increasing attendance amongst young people**

Arts Council England’s New Audiences programme (1998-2003) identified several overarching issues to bear in mind when developing young audiences (Johnson 2004):

- Special events are successful at attracting young people, but do not automatically turn them into regular attenders. Although young people may feel less intimidated by the venue in future, this does not translate into future attendance.

- Venues need to sustain and manage a special welcome and create the right ambience for and attitude towards young people. Engaging with artists and artforms which young people are already interested in and creating dialogues between high arts and popular culture are successful approaches.

- Price is an issue, but not the main barrier. Young people are more influenced by social factors (what their peers, friends, teachers and mentors say) than by any other factor.

- Ambassador schemes, peer marketing and consultation about programming can be effective but expensive. Word of mouth is the most powerful channel amongst this group, followed by methods combining familiar media and relevant language (eg text messaging campaigns).

- The use of non-traditional venues is effective where practical.

- Partnerships with local youth organisations, agencies and schools are important.

- Involvement of young people through consultation heightens organisations’ awareness of young people’s needs, supporting sustainable development.

- The majority of young people want to interact and participate in events.

The biggest barrier to attendance identified by new young attenders to Theatre Royal Stratford East is lack of information about what’s on. Unless young people are actively interested in theatre and seek out the information, little marketing activity reaches them.
Audience knowledge digest

The New Audiences programme identified the following recommendations for engaging young people with the arts (Cultural Intelligence cited in Johnson 2004):

- Change the venue to provide wider social functions eg a meeting space
- Ensure front of house has a positive attitude to young people, including staff, management, a welcoming environment and relevant promotional information.
- Adapt content – shorter performances, more interaction, themes appealing to young people’s interests.
- Introduce work made by young people.
- Relocate events to familiar non-arts venues
- Introduce cultural mentors.
- Increase opportunities to attend.
- Engage with the ideas, aspirations, experiences and opinions of the young.
- Develop a bridge between schools and arts venues.
- Introduce schemes to combat perceived price barriers eg pay as you please, free tickets.

**Young People’s Transport Scheme, Midlands Arts Marketing**

This project tested lack of transport as a barrier to attending the arts for young people aged 16-19 in rural and urban Northamptonshire, revealing that actually it was lack of relevant product that was the real issue for the non-attenders.

When offered free transport and discounted tickets, 16 people took up the offer. When offered a programme geared towards stated preferences but without free transport, 80 people took up the offer. (Johnson 2004)

**How much?, Sheffield Theatres**

This project tested the impact of programming, price and promotion on young people’s theatre attendance (16 to 24 year olds). A pilot phase generated an audience of 12,000 young people, which was then used to explore how to build a sustainable pricing policy, develop accessible programming and test different methods of promotion. The research revealed the following:

*Programming:* No evidence that young audiences want ‘dumbed down’ content. Performances with well known faces were popular, but young people
were prepared to pay more to see more sophisticated productions.

*Pricing:* Price is not an absolute constraint to attending for young people, but is a significant factor if potential attenders are not sure what they will get for their money.

*Promotion:* Word of mouth was by far the most effective form of promotion amongst the target audience (37% main source). Specific print aimed at young people was the second most effective (16%), much more effective than general print, which was only picked up by 9% of first time attenders and 6% of frequent attenders. Flyers were the main promotional source of information for 13%, and the website attracted significant traffic, but other marketing methods were largely ineffective with the target group.

The project concluded that price was a secondary barrier, with lack of awareness of the value and relevance of the product being the key factor in low attendance amongst young people. (Johnson 2004)

**Club events in galleries, North East art galleries**
Generator led the development of a series of DJ-led activities in visual arts galleries, aiming to demystify the space for young audiences familiar with dance culture and encourage attendance. Events were held at the Hatton Gallery, Northern Gallery for Contemporary Arts and BALTIC. The project commissioned a film designed to fit into a clubbing environment and a DJ workshop before every exhibition produced a soundtrack that could be played live to the film. These club style residences lasted a week n each gallery, culminating in three events which were promoted through club style print and in association with Galaxy Radio. 700 attenders came to the events, 217 of whom were new to the venues. (Johnson 2004)

**Sample events, Royal Exchange Theatre**
The Royal Exchange ran First Bites, a programme of sample events conceived as a three-dimensional brochure – extracts from six visiting companies and one Royal Exchange Theatre production performed all in one hour to uncommitted previous attenders. Blue aimed at the youth audience with little or no experience of theatre, combining extracts with DJ sets to create a club style event in the studio. A free one day event (Big Bite) was aimed at infrequent attenders and families. It included talks and demonstrations from various members of staff (director, designer, sound designer, actor) interactive workshops and printed background information – more than 800 people attended. (Johnson 2004)
Marketing the arts to young people

A number of commercial studies have identified the following key tenets for marketing products to young people. Whilst museums and galleries are faced with dispelling certain negative preconceptions amongst this age group, there are also advantages in selling experience-based, non-commercial products – museums and galleries’ messages may make it through the filter of cynicism and market-savvy that the no-logo generation apply with scorn to much traditional commercial marketing.

**Be believable**

Young adults are undeniably jaded about marketing. Enthusiastically promote your product and its key attributes; however, be sure to deliver on each point. Don’t overstep the boundaries of credibility for your category as well as for your brand. Hip brands such as Sony, Pepsi-Cola, and Nike can push the envelope much more than staid ones.

**Avoid stereotyping**

Recognizing the incredible sense of diversity prevalent among their own peer group, young adults recoil at being pigeonholed.

**Get personal**

Twentysomethings crave one-on-one relationships with marketers as evidenced by our ongoing research which has found that copy pronouns such as ‘you’ tend be much more effective than ‘young adults’ or ‘Generation X/Y’ because of the implicit ambiguity. Also, if you’re visually depicting the market, be sure to show ethnic and gender diversity.

**Innovate**

Young adults like meaningful innovations for two reasons: (a) they are on a perpetual quest for new experiences, and (b) they crave a more meaningful, simple, and productive life.

**Be as hip as possible (but stay true to your brand identity)**

Naturally, consumers will gravitate to packaging that demonstrates a better understanding of their needs. Don’t ever overstep the boundaries of hipness for either your category or your brand, otherwise you’ll be labelled a poseur. For instance, the use of slang may be better suited for some product categories or brands than others. "Slanguage" can help a package resonate with a BOOM! Street talk can also just as equally backfire if misused or abused. (Morrison 2000)

**Clubs as venue and promotional channel, Northern Stage**

Northern Stage worked with performing arts students to create a performance
The performance mainly attracted groups, with 80% of tickets sold to groups of 4 or more. 44% of the audience had not been to the venue before.

Audience knowledge digest

piece for the Palace nightclub. Leaflets were distributed at the club with vouchers redeemable against the performance of A Clockwork Orange at Sunderland Empire. ‘Hit squads’ were used to distribute targeted print on campus, on street and in bars and clubs. 2,500 clubbers experiences the specially devised piece at the Palace, with A Clockwork Orange attended by 1,682 new audiences (80% of which were new attenders, and 56% under 25 years old, 45 people used vouchers from club promotion). 10% of these new attenders subsequently rebooked, mainly for comedy and live music. (Johnson 2004)

Da boyz, Theatre Royal Stratford East

Da Boyz was based on Shakespeare’s A Comedy of Errors, with music from the broadway show The Boys from Syracuse sampled and remixed by prominent UK DJs. The production was closer to a hip-hop concert than musical theatre, with the cast drawn largely from the East End and guest appearances from UK hip hop stars and street dancers.

The marketing strategy used the methods, media and creative vocabulary of club nights and gigs (rather than theatre) to communicate with the target youth audience, with materials tested out on focus groups.

The logo for the show was a simple graffiti-style design, which was plastered all over Stratford – the theatre gave out over 100,000 low tack stickers to local young people. These stickers raised curiosity amongst the target group about what Da Boyz was, as the stickers showed only the logo.

A6 flyers were distributed to university and college campuses, youth hostels, outside clubs, in shops and at other arts venues.

An SMS campaign was used, targeting 10,000 local phone numbers offering free ringtones, a logo that could be used as a money off voucher for tickets and direction to the Da Boyz website.

The website was used to carry most of the information, with other areas of the campaign designed to drive traffic to this. It included detailed information about the show, a message board encouraging feedback and links to and from hip hop sites.

A structured set of concessions were also available (only 18% of tickets were sold at full price) including group discounts, with a large number of complementary tickets given out to encourage word of mouth.

In total, the marketing campaign cost around £30,000. 62% (6,740 people) of the audience was under 25, with many teenagers attending more than once.
The performance mainly attracted groups, with 80% of tickets sold to groups of 4 or more. 44% of the audience had not been to the venue before.

8.7 Older people

People aged over 50 are an increasing segment of the population, with a higher than average disposable income. Many arts organisations report that the age profile of their visitors is concentrated in older sections of the population. However, there is opportunity to expand this audience and consider how provision may have to change to cater for the particular circumstances of this growing group.

The main barriers amongst older people tend to be physical and psychological (Trevelyan 1991) and these issues can determine their leisure activities in general, not just their attitudes toward museums:

- Ill health ‘I am retired through ill health and there is not a lot I can do’
- The cost of transport and general difficulties of going out
- Fears about safety

Arts Council England’s New Audiences programme identified the following issues relating to older audiences:

Older people are not a homogenous group. In addition, many people do not choose to define themselves as part of an ‘older audience’ or welcome being included in an ‘older people’s project’ – particularly active, independent and employed people, but also many people regardless of personal circumstances. There was no interest in ‘special’ programmes for older people.

Geographic location, lack and cost of transport, price, access to information and having nobody to go with were all identified as potential barriers to attendance. Timing of events and customer care are also important for this age group. Amongst those in full time work, time pressures are a bigger factor than any other.

Partnership working with groups and organisations specialising in provision for older people is important, particularly with the older end of the group, although it can be tricky to establish mutual understanding with ‘gatekeeper’ home managers.

Daytime events and matinee performances are popular with older groups. Events with extra interpretive activities were more appealing.
Social opportunities are particularly important for some older people – activities that encourage discussion, workshopping, tours and socialising (refreshments and so on) enables visitors to meet like-minded people.

**Plymouth City Museum and Art Gallery** have worked with Plymouth City Council’s sheltered housing unit doing reminiscence work with elderly people who are often isolated from social activities. This approach gives emphasis to the people and the skills and experiences they can contribute. People are brought together by theme, not by social group – an approach considered more socially inclusive.

**Getting there, Equal Arts**

This project aimed to develop practical solutions to transport issues for older people. The project set up a subsidised taxi service for Gateshead residents over 60 to access arts activities and venues in Gateshead and Newcastle. Members could also meet once a month for an outing.

In the first two years of the project (2002 to 2004), over 53 members had made 388 journeys. Key factors identified included safety, trust in the taxi firm and a preference for group outings. The project as a whole has enabled participants to visit art events they had not been able to visit for a long time, as well as raising confidence about going out, especially in the dark and going to unknown venues. 100% of those asked said the transport made them feel confident, comfortable and safe. (Johnson 2004)

**Time Out, Midland Arts Marketing**

This project aimed to increase live attendance at venues by the over 50s, after research showed that many people stopped attending due to illness or death of partner or friends who they used to regularly attend with. Buxton Opera House, Phoenix Arts, Leicester and Nottingham Playhouse offered older people a choice of theatre, dance, opera and films to attend. Around these events, talks by performers, backstage tours and refreshments offered social opportunities for attenders who may not have had a companion. 350 people attended 15 events, with events that combined performances with backstage tours, meeting casts and refreshments the most valued. Participants were attracted by the social opportunities of the events, which allowed them to meet like-minded people. (Johnson 2004)
8.8 Factors beyond ‘barriers’

Since 1999, there has been a huge rise in 'lack of time' as a factor in non-visiting: this has risen from around 5% to 33% in 2004. There has been a drop in the proportion of non-visitors who do not make a visit because there is nothing they want to see, and the proportion of people mentioning that 'museums are boring places' has halved to 6%. This shows that museums seem to be providing a service that people want to make use of – if only they could find the time (MORI 2004).

The main reason given for not visiting a museum or gallery in the past 12 months was ‘not really interested’ (33%) followed by ‘it’s difficult to find the time’ (27%) (DCMS 2006c). This is consistent with MORI findings, where the top reasons for not visiting a museum or art gallery were lack of time (32%) and not being interested in such places (22%) (MORI 2004). Both of these reasons indicate an inherent lack of interest – visitors who say they have no time are unwilling to find time over the course of a year to make one visit. This is an indication that these people do not see museums and galleries as places that can meet a sufficient number of their needs.

This research is corroborated by Developing New Audiences for the Heritage (PLB 2001) which argues that the two most commonly stated ‘barriers’ to visiting – insufficient time and lack of interest – are actually personal reasons not to visit rather than external barriers, and boil down to lack of interest (as respondents are actually saying they are insufficiently interested in visiting to sacrifice other leisure pursuits, or they don’t see museums as a good way to spend their time or money). These reasons are actually the result of two main barriers:

- Lack of information/ awareness – not knowing what is available, not knowing how or why they may be interested in it.
- User perception – A belief that the resource is not relevant or interesting, or lack of sufficient effort by museum to make it relevant!

It is possible to approach the issue of attendance from a different perspective: rather than barriers preventing people from engaging with museums, people are choosing not to engage with museums because they do not perceive museums will meet their needs. Research carried out by Morris Hargreaves McIntyre on contemporary art audiences in Wolverhampton (Morris Hargreaves McIntyre 2001) also found the following:

- Very little evidence of barriers preventing attendance in the Dodds and Sandell sense – free admission, accessible location
• Lack of evidence that psychological barriers (e.g., negative social and cultural perceptions) were preventing anyone who actively wanted to attend from doing so.

• Main reasons for non-attendance were not so much presence of barriers, as absence of persuasion that the gallery might meet their needs.

• Most respondents were aware of the gallery and even of temporary exhibitions, but needed to be persuaded that a visit would satisfy their needs.

The main factors standing in the way of inclusion were:

• Not enough marketing activity.

• Not enough different media used to get message across to mass market.

• Not a persuasive enough message.

Research for the Laing Art Gallery (Wood Holmes Group 2004) revealed the following factors preventing non-visitors from making a visit:

• Poor awareness of free entry.

• Unsure of the location, or concerns about location as not in centre of town.

• Lack of awareness of what is on offer – little word of mouth recommendation as friends and family do not visit either, unaware of range, type or titles of exhibitions.

• Perceived as not family friendly – parents were concerned about lack of interactive exhibits.

• Inconvenient opening times.

• Not part of the modern Newcastle.

These factors show that perceived 'barriers' to attendance are actually due largely to misconceptions, which have not been redressed by effective marketing messages to non-visitors. Better communications with the potential audiences which clearly communicate the benefits of a visit for families and give information about the upcoming programme in places non-visitors will see, plus some alterations to make the venue more accessible (late opening, more facilities for children) would help to tackle these.

Research for Birmingham Museum and Art Gallery (Morris Hargreaves McIntyre date) revealed the following attitudes prevalent amongst non-attenders:

'I had one quick look around and it bored me'
‘If someone’s studying they’d go there’

‘It’s a good place for people who like that sort of thing ... but the likes of us we’re not bothered’

‘There’s nothing about our culture’

Targeting families as a market segment is being proven in research to generate higher proportions of C2DE visits. In two galleries operating rolling surveys whereas C2DEs accounted for 28% and 42% respectively of all visitors, amongst family visitors C2DEs accounted for 46% and 61% of family groups. These proportions more closely reflect the resident proportions of 57% and 53% C2DEs in the population as a whole and start to build the case that families as a segment contain higher than usual proportions of C2DEs.

Not For the Likes of You (Morton Smyth 2004)

Audience focus in organisations rather than specific schemes as such:

MacRobert’s family focus p 10 doc b
Manchester Art Gallery – audience focus p 12 doc b
Wolverhampton Art Gallery p22 doc b

Tyne and Wear Museums’ Statement of Purpose and Beliefs (REFERENCE) responds to local needs as follows:

Mission: ‘to help people determine their place in the world, and understand their identities, so enhancing their self-respect and their respect of others’

Beliefs: ‘We make a positive difference to people’s lives. We inspire and challenge people to explore their world and open up new horizons. We are a powerful educational and learning resource for all the community, regardless of age, need or background. We act as an agent of social and economic regeneration. We are fully accountable to the people of the North East’

Such documents are in themselves powerful tools for change, providing there is a high level of ownership among staff.
Conclusions and recommendations

Lack of evaluation on marketing effectiveness

The process of compiling this research has revealed that there is relatively little evaluation into effectiveness of different museum marketing approaches. The amount of variables which affect people’s propensity to visit a particular venue or exhibition (as outlined throughout this report) makes it difficult to compile definitive norms on the response levels to different promotional tools.

However, even on a project basis there is often little or no evaluation of marketing effectiveness. Put bluntly, if an exhibition is a success this is often attributed to the quality of the display, whilst a poorly attended exhibition is often attributed to marketing.

Also as one respondent to our request for case studies put it, ‘once the exhibition is on, we go straight onto the next thing – there’s no time for evaluation’.

Those that do include marketing evaluation are so context and project specific that there is little to glean from them beyond fundamental tenets. Eg depends on who audience is, demographic and psychographic profile of catchment area and potential attenders, amount spent on different marketing campaigns, what the product is.

Needs for primary research

Segment Tyne & Wear / North East audience

A segmentation system for museum and gallery audiences in the North East would be invaluable to museum teams across the region, helping to inform strategic marketing and programming at venues and collectively for groups of museums. This research would also identify the proportions of visitors with different motivations at each venue.

Understand crossover

At the moment, there seems to be a large amount of crossover between Tyne and Wear venues, with a core group visiting most places in the last 12 months. Research would give the organisations an accurate picture of this, enabling more sophisticated and informed joint marketing and programming.

Needs for secondary research

Beyond the scope of this digest, we would recommend that the following avenues for further secondary research are considered:
Meta analysis project of special exhibitions marketing data

It might be possible to obtain data from a wide enough selection of organisations on marketing spend and visitor numbers that norms can be compiled on the effectiveness of different approaches. This method would be extremely time-hungry and much of the data one might hope to use may not be available. However, if the data exists within North East museums, this might be a useful place to start.

Analysis of visitor-focussed organisations

It may also be useful to gain further insight into what makes a successful visitor-focussed organisation, as outlined in Not For the Likes of You (Morton Smyth 2004) by compiling case studies of museums services that have reputations for this (eg Glasgow, Tyne & Wear).

Action research

As a museums service which has pioneered much of the ground-breaking work on attracting new audiences, Tyne & Wear Museums are well placed to conduct a series of experiments on marketing and programming, in particular for temporary exhibitions. With full formative and summative evaluation, this could attempt to fill the relatively large gap in audience knowledge about the exact approaches which work with different audiences (especially new approaches and new technology) and would also be specific to the North East.
Morris Hargreaves McIntyre is a creative and intelligent arts management consultancy working in the interests of audience and organisational development.

The company combines thorough project planning with incisive, deep analysis, lateral thinking and detailed, intelligent strategic planning to produce relevant, helpful and high quality reports with practical recommendations.

Our services include:

- strategic analysis, planning, and development
- product and service development
- feasibility studies
- market appraisals
- marketing audits, strategies and plans
- audience development strategies and implementation
- access strategies
- in-service training
- training needs analysis
- training programmes
- organisational development
- change management.

Most of our projects are research-based.

We have a fully integrated market research service that undertakes:

- quantitative research
- qualitative research
- telephone marketing
- community consultation