

Happy Hours? Fun Runs?

How To Successfully Diversify The Visitor Experience

Real Places 2019
Colleen Dilenschneider
17 January

A note from IMPACTS

Thank you for attending this session at Real Places 2019! We hope this information may be helpful to your organization in understanding audiences and informing strategic directions and approaches. We hope that you will take time to consider the findings, discuss them, and use them as tools to help drive your organization forward in achieving your mission.

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If you are interested in having the data re-presented to others or expanding upon the data in order to better understand audiences or behaviors, then please contact us at cdilenschneider@impactsresearch.com or jhekkers@impactsresearch.com. We would be delighted to discuss this with you and hope that the information herein may be of service.

Happy data diving!

colleendilenschneider

know your own bone

A data-informed resource for cultural executives



DATA & ANALYSIS



THOUGHT FUEL

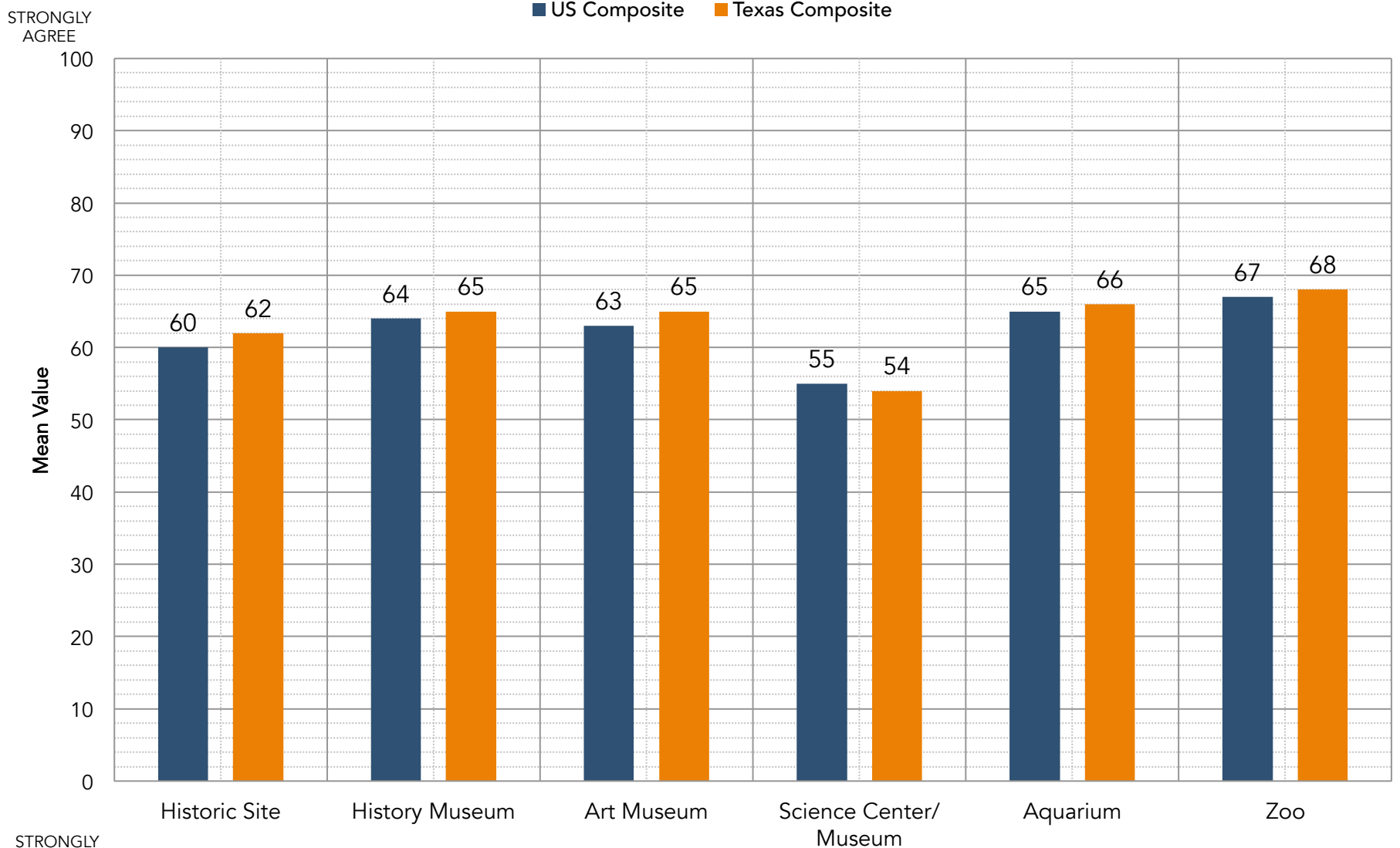


FAST FACT VIDEOS

impacts

Are people who live in Texas
interested in attending
cultural organizations – and
historic sites, in particular?

I am interested in visiting a(n) ...



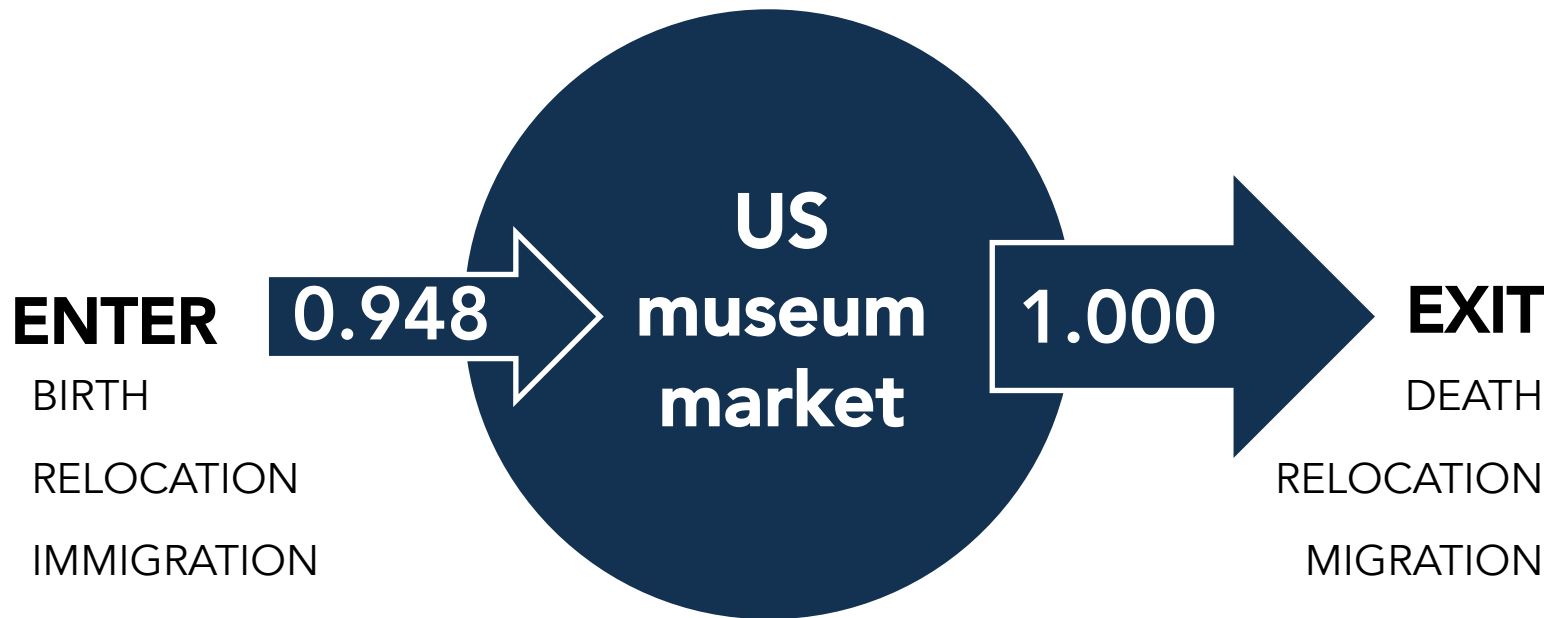
*Of respondents indicating affirmative precedent awareness

Strategies for successfully diversifying the visitor experience

1. Why we need to reach new audiences
2. An overview of who they are
3. Why diversifying the experience is helpful
4. What inactive visitors like to do
5. Two secrets for successful programs

Why we need to reach new audiences.

Current visitor substitution ratio US museum "historic" visitor



Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)

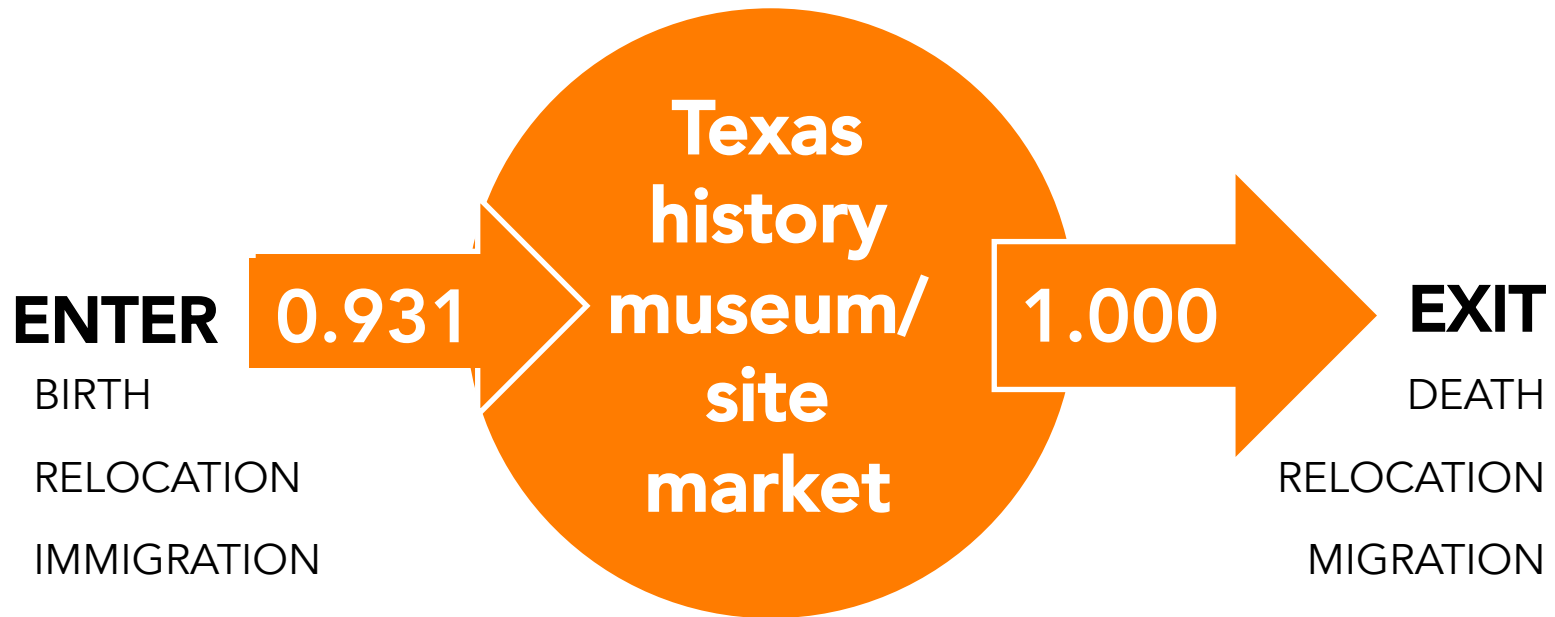
Current visitor substitution ratio US history museum/site traditional visitor



Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)

Current visitor substitution ratio

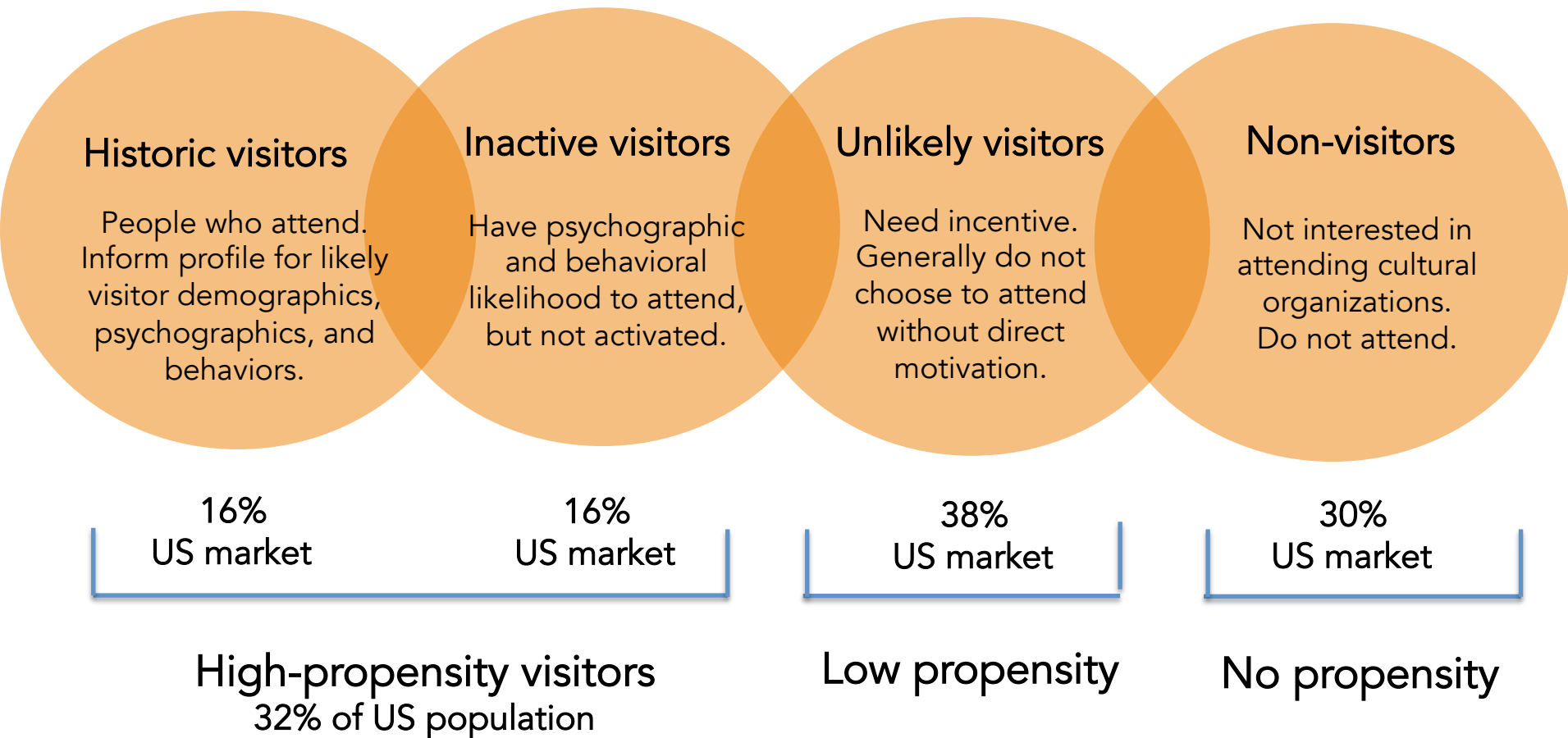
Texas history museum/site traditional visitor



Less in + More out = **Shrinking visitor base**
(NEGATIVE SUBSTITUTION)

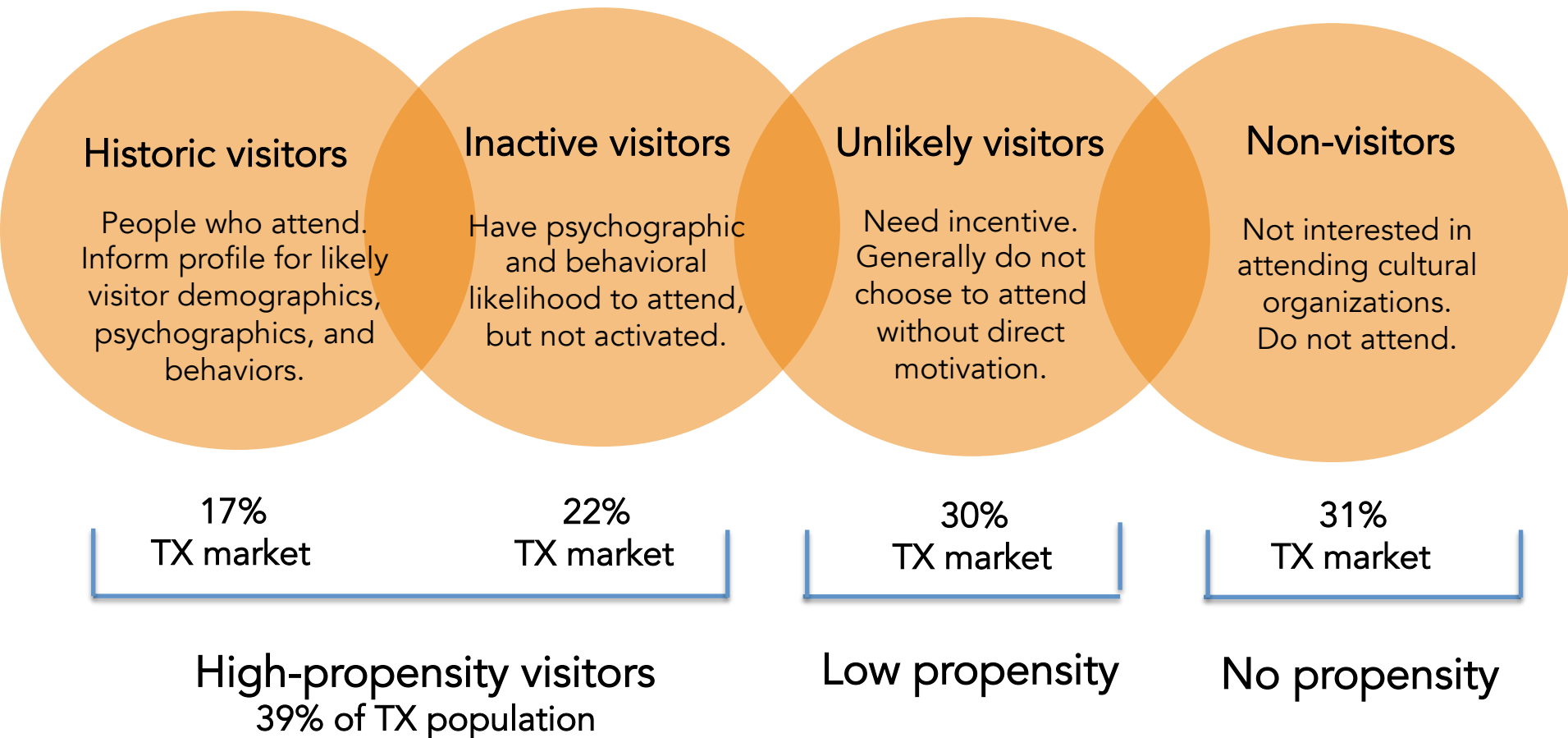
Visitor and non-visitor cohorts for cultural organizations

US composite market



Visitor and non-visitor cohorts for cultural organizations

State of Texas



How do history museum and historic site inactive visitors compare to active visitors?

Inactive visitors are...

- more racially and ethnically diverse
- more diverse in terms of household income
- highly educated – similar to active visitors
- even more likely to have traveled for leisure purposes
- very likely to pursue foreign travel
- more active (leisure travel, low-intensity outdoor activities)
- spending more money online
- dine out more often
- cord-cutters
- less likely to subscribe to print media

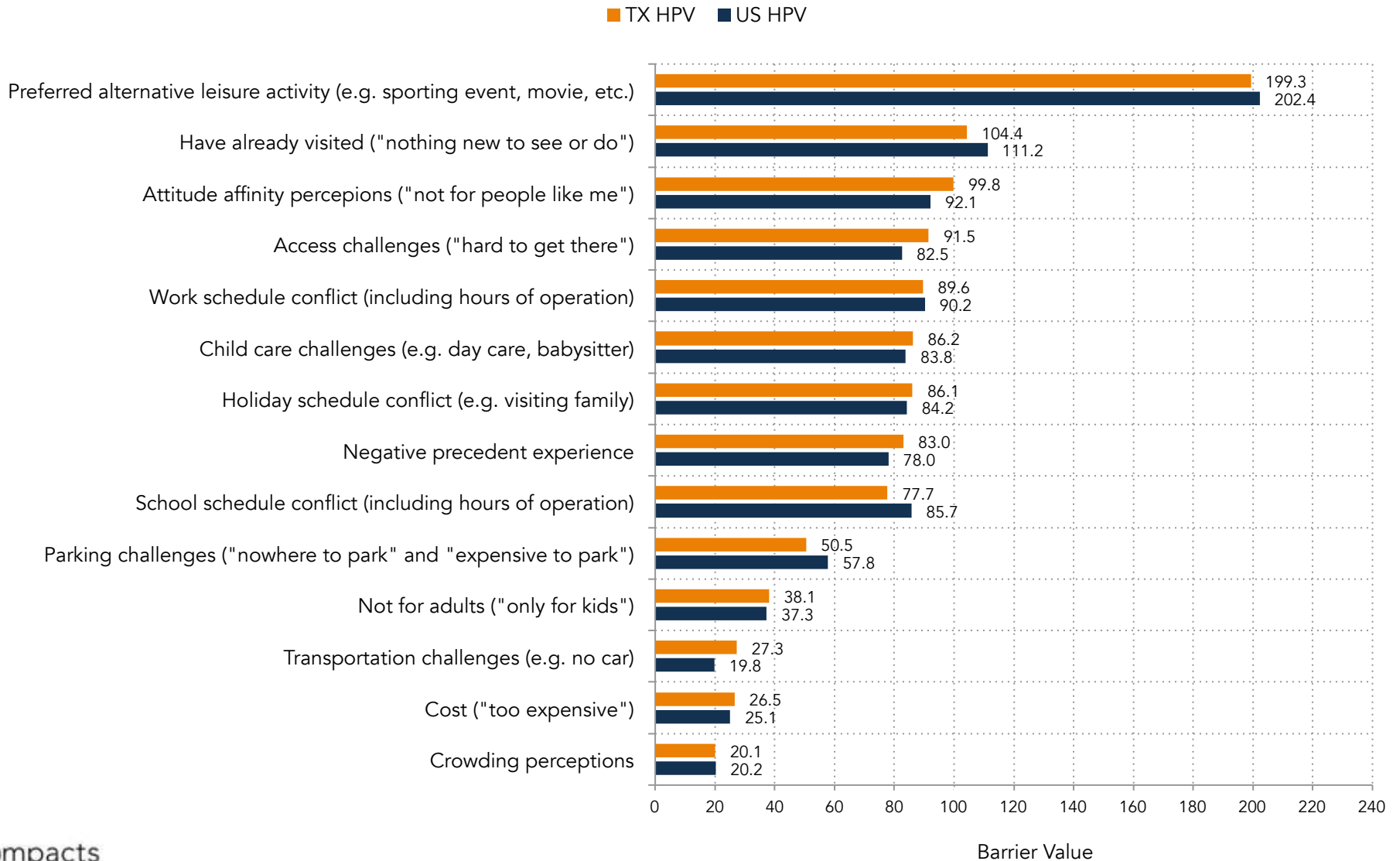
These people are educated, and more diverse and active

How can diversifying the experience help motivate attendance?

1. Inactive visitors are even more active than traditional visitors
2. Knowing what likely visitors prefer to do can help us combine the “motivation power” of other activities
3. It can help strengthen community partnerships to engage audience subsets
4. It can help create business partnerships that help underscore our mission and create unique experiences
5. Competition for leisure time is fierce

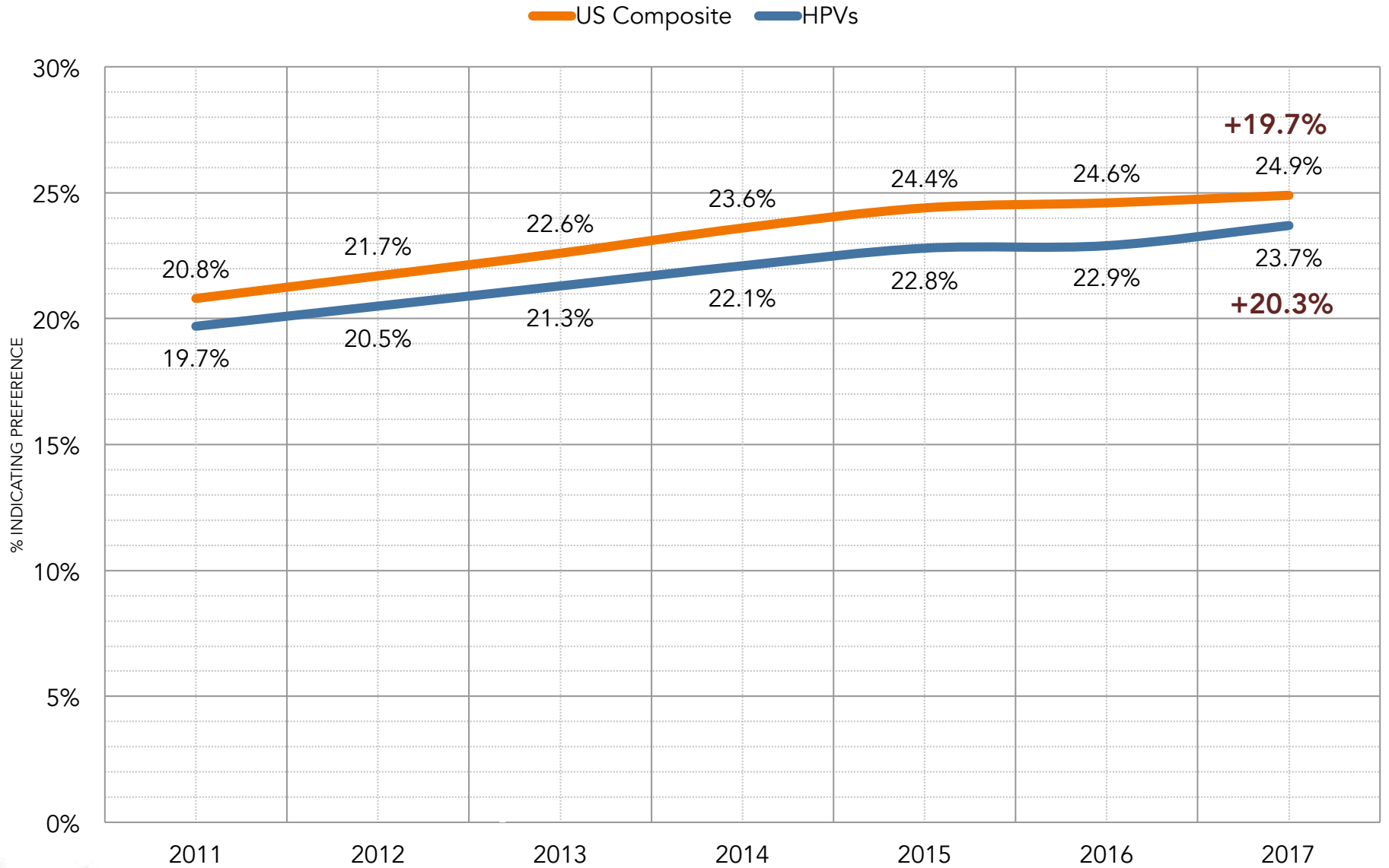
Barriers to visitation for HPVs

Given your interest in visiting a history museum and/or historic site, why haven't you visited within the past two years?



"Stay home" during week preference

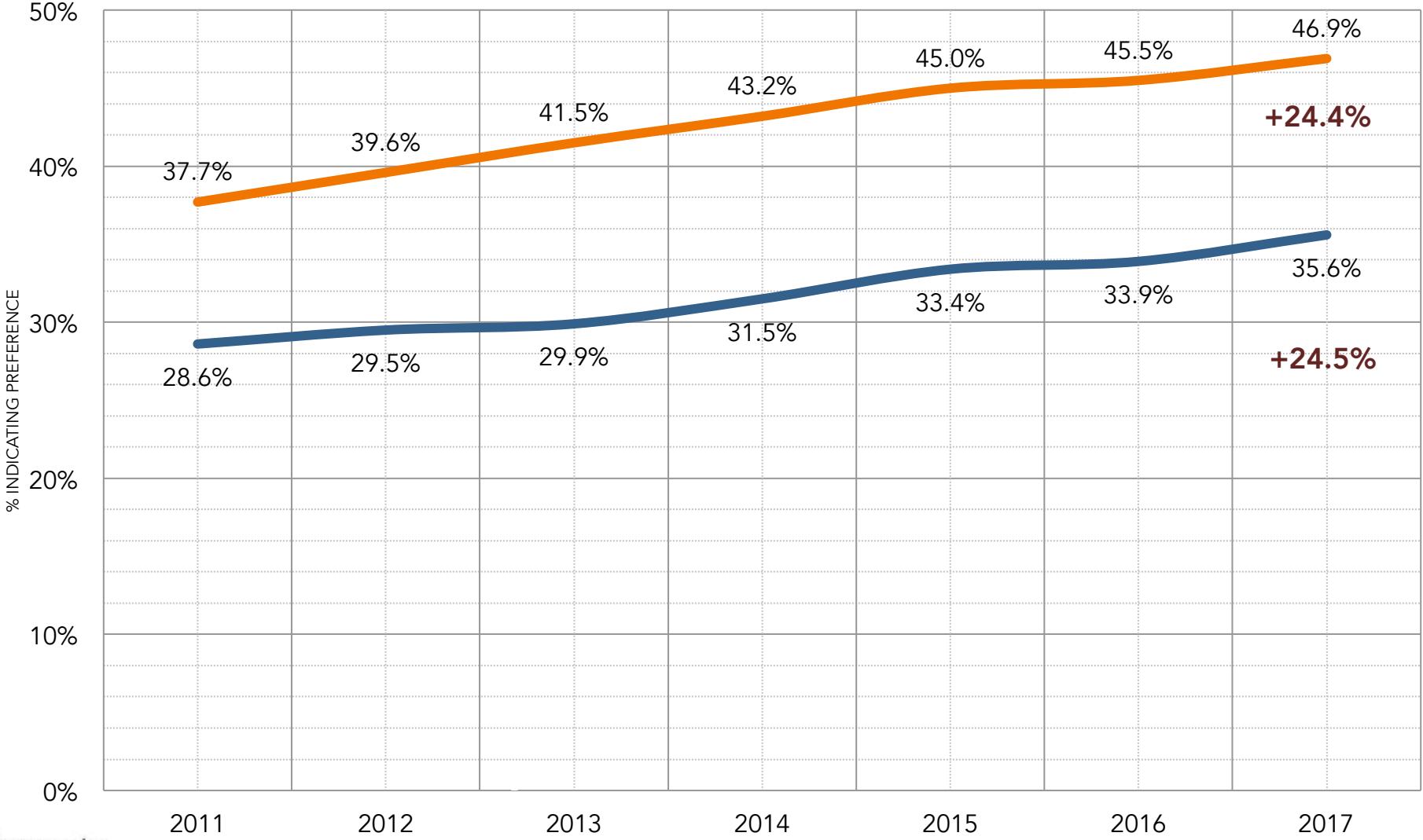
Five-year tracking (years 2011-2017)



"Stay home" during weekend preference

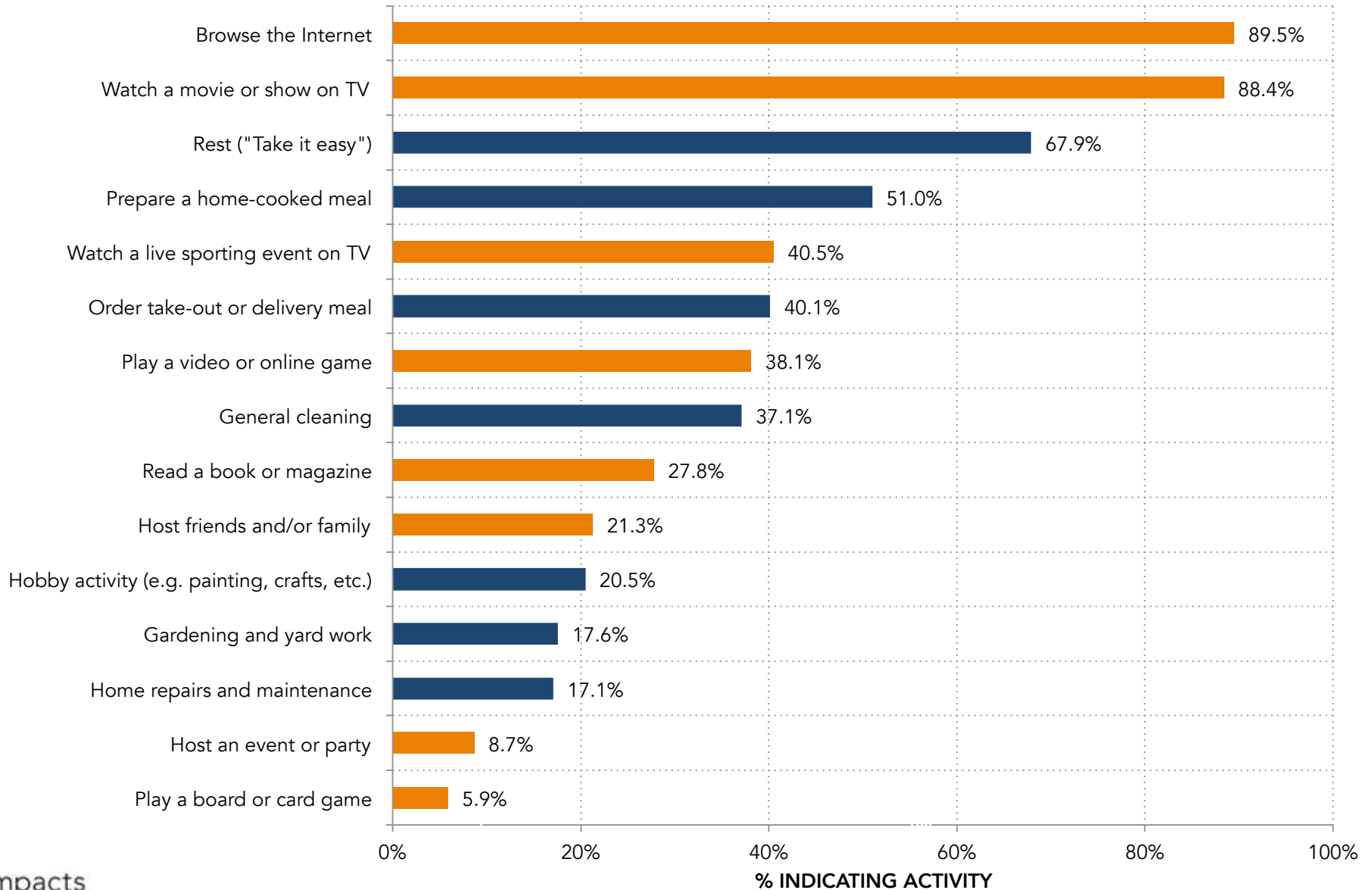
Five-year tracking (years 2011-2017)

US Composite HPVs



Home-based activities

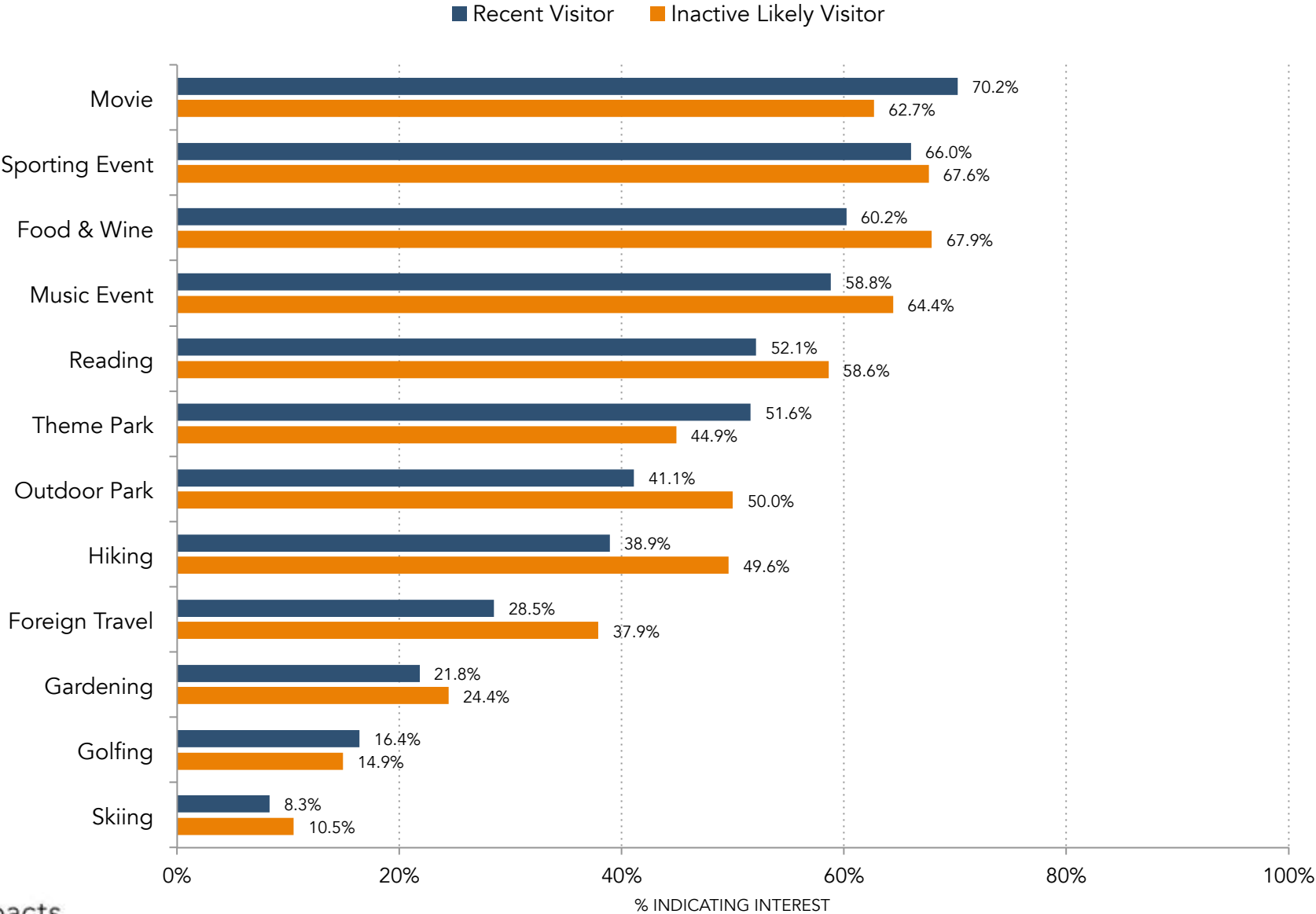
(Among respondents preferring to stay home, EOY 2017)



What do high-propensity
visitors like to do?

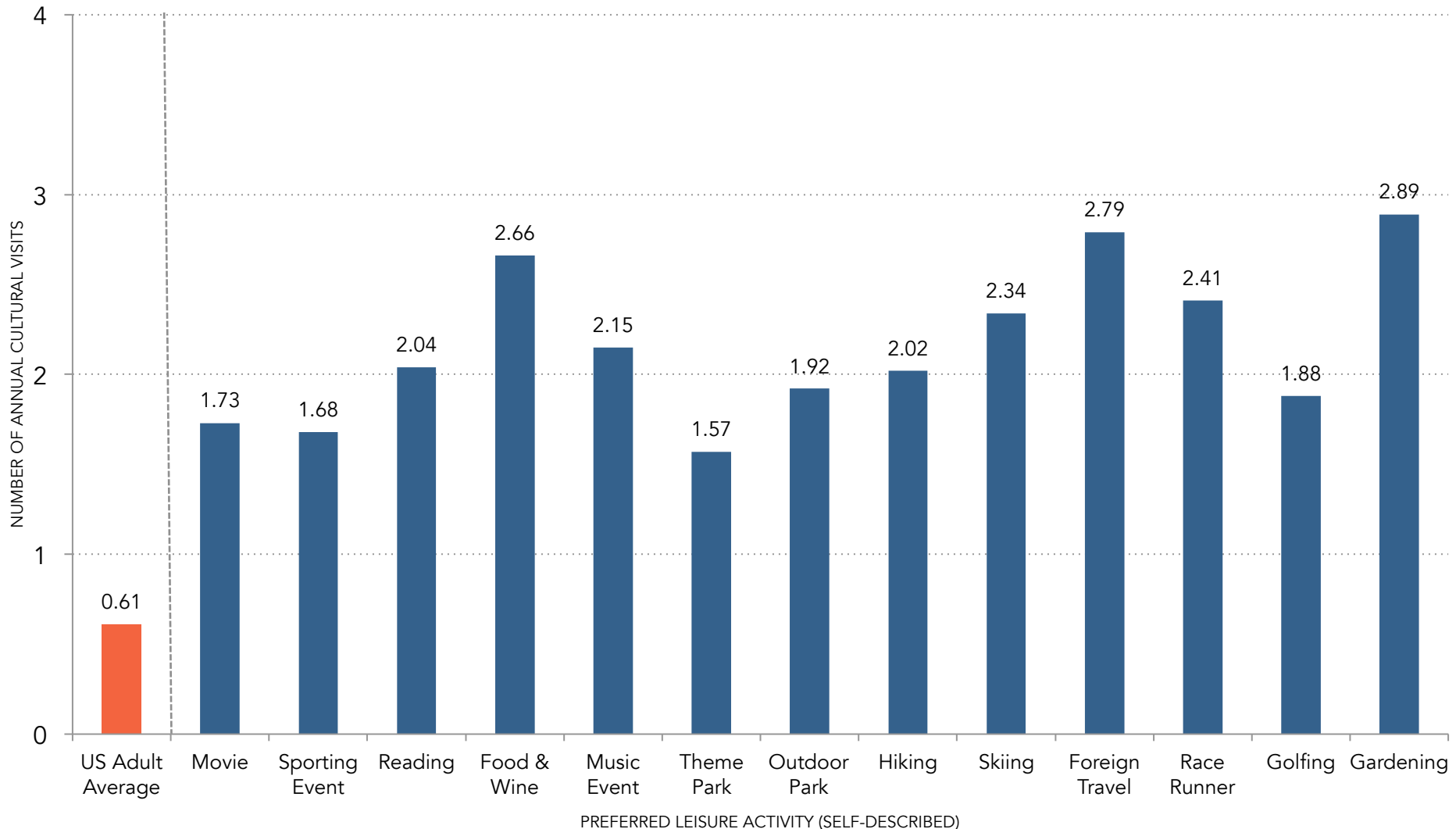
Preferred Leisure Activities by Cultural Participation

Recent and inactive visitor in Texas



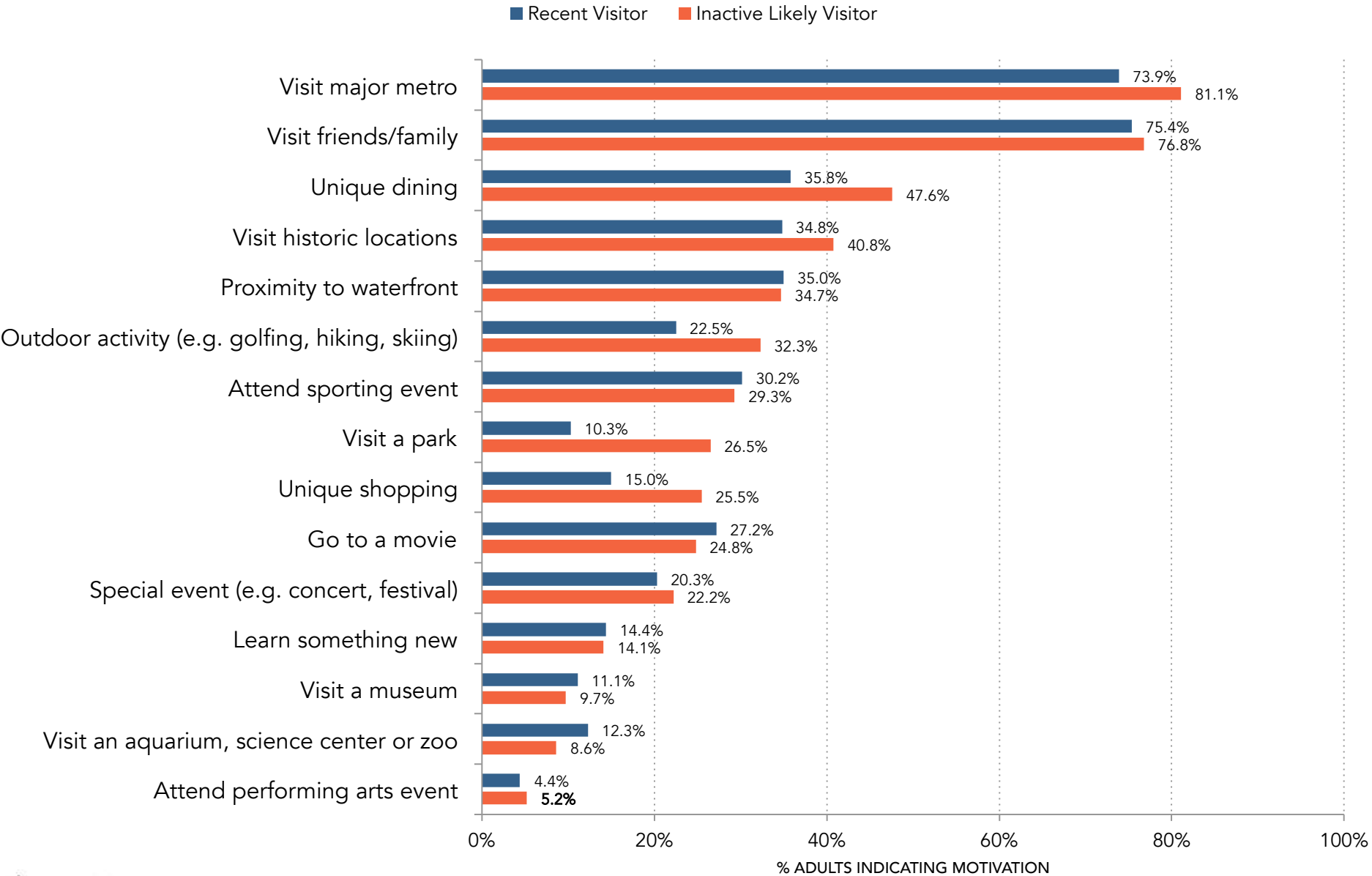
Annual Cultural Visit Count by Preferred Leisure Activity

US composite market



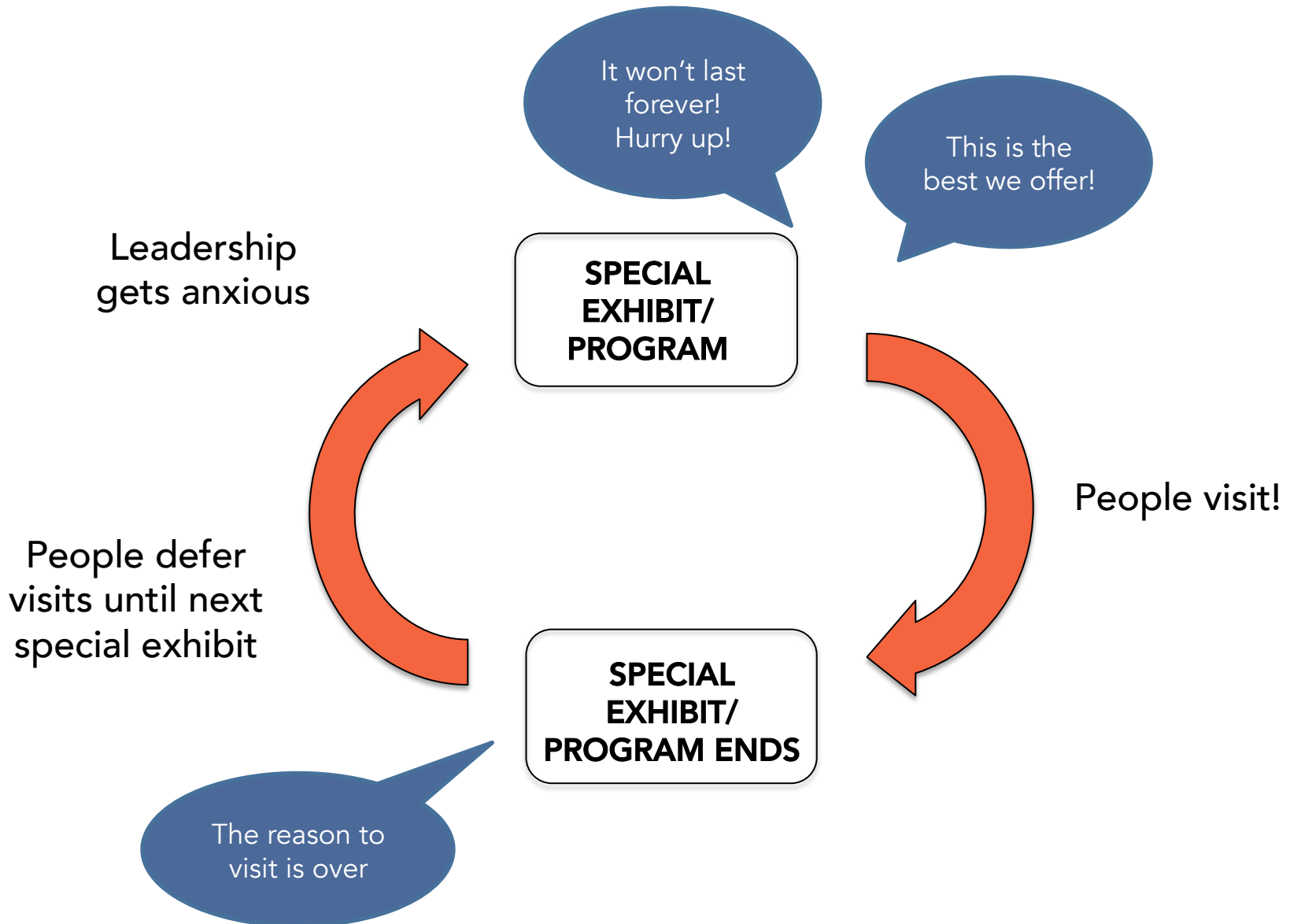
Leisure activity motivation

Recent and inactive visitor in Texas

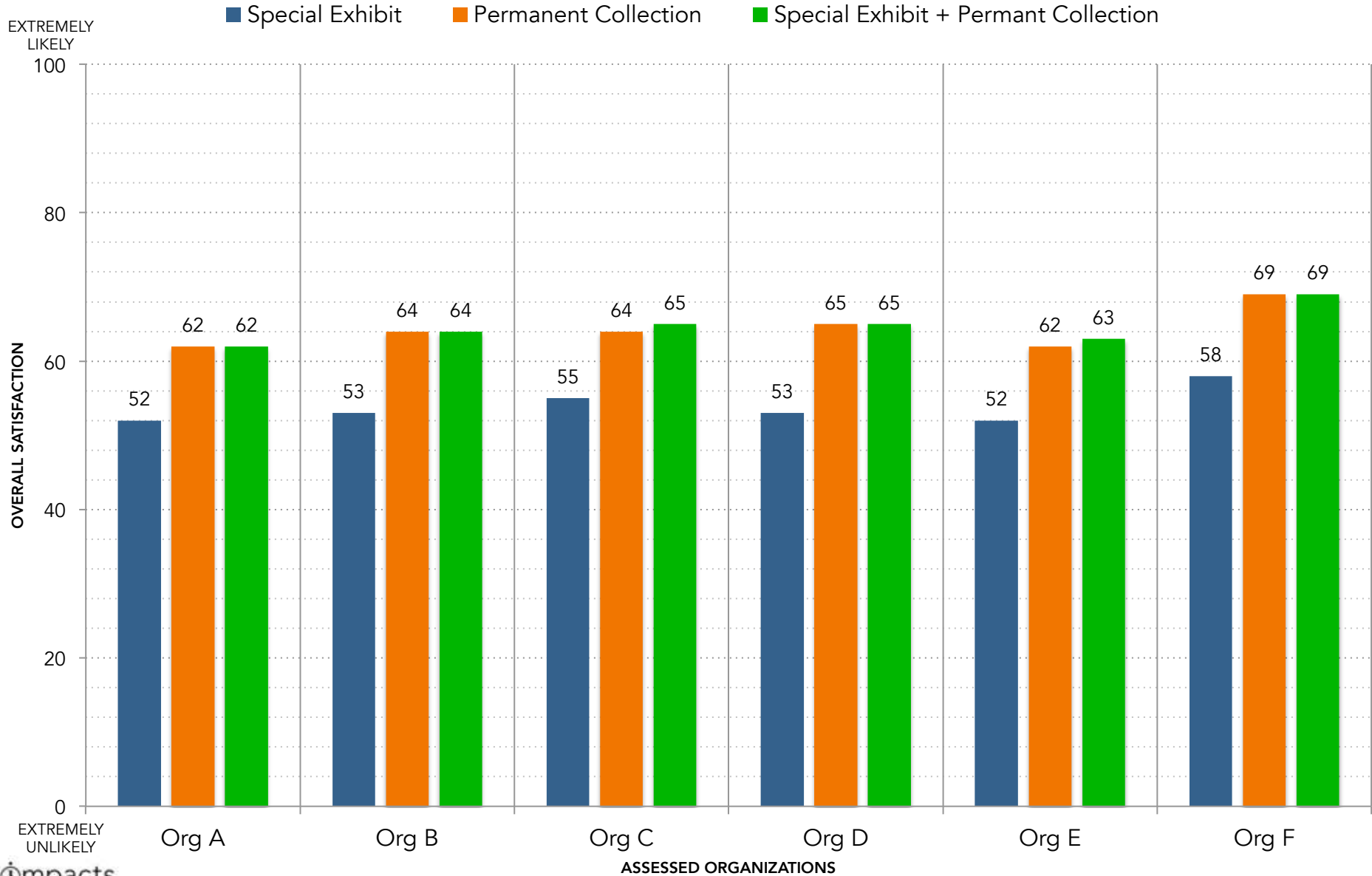


Two secrets to success in diversifying the visitor experience

“Special” exhibit/program cycle
“Nothing new to do or see”



Intent to re-visit within one year by onsite experience



~~"We're doing a thing you'll like today!"~~

"You can count on us to reliably provide experiences you'll like."

Secret 1:
One-off programs don't
work. It's about
integrating connective
experiences into an
organization's strategy.

Secret 2:
Your mission matters.



WARNING

TEXT SLIDE AHEAD*

*** AN UNOFFICIAL DATA-BASED PRESENTATION REQUIREMENT**

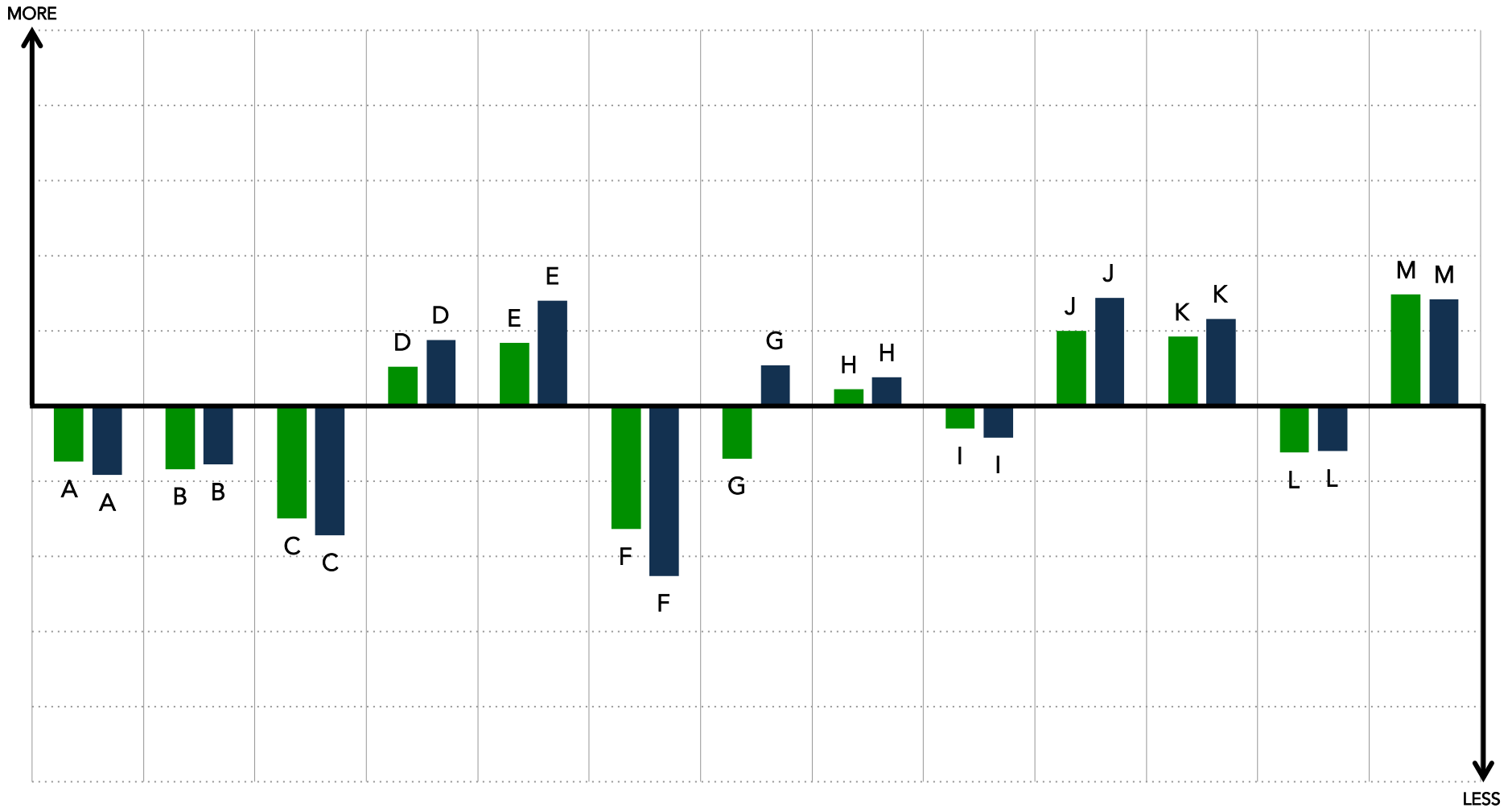
Revenue Efficiency: A composite metric contemplative of onsite-related earned and contributed revenues (e.g. admission, contributions, grants, membership, programs) contemplated relative to the cost to deliver onsite services (i.e. operating expenses) and the number of persons served onsite. Generally, a more “revenue efficient” organization exhibits more favorable financial key performance indicators (e.g. greater revenues, greater net operating surplus) and reduced financial volatility than does a less revenue efficient organization. Data informing the IMPACTS revenue efficiency calculation are commonly available in an organization’s financial statements, annual reports, and Form 990 filings.

Reputational Equities: A composite metric contemplative of numerous visitor perceptions such as reputation, trust, authority, credibility, and satisfaction that collectively indicate the market’s opinion of an organization’s relative efficacy in delivering its mission. As mentioned previously, IMPACTS collects perceptual data from 224 visitor-serving organizations in the US to inform its reputational equities calculation.

Relative Revenue Efficiency and Reputational Equities

US Museums – 4Q 2016

■ Revenue Efficiency ■ Reputational Equities



*Of assessed US museums with an admission basis.
Based on EOY 2016 financial analysis.

Three Elements of Ongoing Engagement



Thanks and appreciation to...

- California Academy of Sciences
- Carnegie Museums
- Exploratorium
- European Union
- European Union Cultural Consortium
- Google
- IMPACTS Research & Development
- MAXXI, Museo Nazionale delle Arti del XXI Secolo
- Monterey Bay Aquarium
- Musée du Louvre
- Musée d'Orsay
- National Aquarium
- National Oceanic and Atmospheric Administration
- Stanford University
- Tennessee Aquarium
- The Ocean Project
- United Nations Educational, Scientific and Cultural Organization
- US Department of State

Speaking of connection...



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