Understanding Potential Visitors
And How To Get Them Through The Door!

Real Places 2019
Colleen Dilenschneider
17 January
A note from IMPACTS

Thank you for attending Real Places 2019! It was a pleasuring sharing information with you! 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.

Please remember that all information and data in this deck is the property of IMPACTS. As per our agreements with generous partners who have helped fund the research and allow us to share the information, this deck and/or any parts of it may not be sold or used for commercial purposes. Similarly, this deck and/or any parts of it may not be made available on behalf of an organization outside of IMPACTS (i.e. on an organization’s website beyond the conference website) or re-presented by another entity outside of IMPACTS (i.e. at a conference, community, or formal gathering), without permission granted by the company and its partners. Key concepts in this deck have been shared in writing on the website Know Your Own Bone (www.colleendilen.com). Please see the website for more information.

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!
colleen dilenschneider

know your own bone

A data-informed resource for cultural executives

DATA & ANALYSIS

THOUGHT FUEL

FAST FACT VIDEOS

impacts
Where is this data coming from?

• IMPACTS VSO monitoring
  – Ongoing, 224 visitor-serving organizations in the US

• IMPACTS client data
  • When permission is granted

• National Awareness, Attitudes & Usage Study
  – Ongoing, 124,000+ individuals
  – Perceptions regarding visitor-serving leisure activities
    • Museums, performing arts, zoos, aquariums, etc.
  – Believed the largest VSO-related survey in US
  – Originally funded in partnership between IMPACTS and The David & Lucile Packard Foundation
  – Representative, and based upon lexical analysis
22% of people in Texas have interest in visiting a cultural organization (including history museums and historic sites), but have not done so in the last two years or more – or ever!

17% have visited within the last two years.
The Four False Dichotomies
How they actually motivate visitation

1. Digital add-on vs. integration
2. Entertain vs. educate
3. Scale vs. personalization
4. With vs. what
1) Digital add-on vs. integration

There’s so much hype! What role does the web and social media actually play onsite and offsite in motivating visitation?
What influences the decision-making process?
Discretionary decision-making utility model

### US Composite

<table>
<thead>
<tr>
<th>Utility</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>147.9</td>
</tr>
<tr>
<td>Cost</td>
<td>121.3</td>
</tr>
<tr>
<td>Travel distance (proximity)</td>
<td>120.5</td>
</tr>
<tr>
<td>Special events</td>
<td>118.8</td>
</tr>
<tr>
<td><strong>Reputation</strong></td>
<td><strong>117.5</strong></td>
</tr>
<tr>
<td>“Family-friendly”</td>
<td>116.4</td>
</tr>
<tr>
<td>Nightlife</td>
<td>110.0</td>
</tr>
<tr>
<td>Climate</td>
<td>107.7</td>
</tr>
<tr>
<td>“Friends and family”</td>
<td>105.3</td>
</tr>
<tr>
<td>Safety</td>
<td>102.6</td>
</tr>
<tr>
<td>Specific activity/attraction</td>
<td>101.9</td>
</tr>
<tr>
<td>Ease of access</td>
<td>100.2</td>
</tr>
</tbody>
</table>

### Western Europe

<table>
<thead>
<tr>
<th>Utility</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>140.1</td>
</tr>
<tr>
<td>Special events</td>
<td>137.8</td>
</tr>
<tr>
<td>Ease of access</td>
<td>127.7</td>
</tr>
<tr>
<td>Planning convenience</td>
<td>118.0</td>
</tr>
<tr>
<td>Nightlife</td>
<td>116.5</td>
</tr>
<tr>
<td>Travel distance (proximity)</td>
<td>108.7</td>
</tr>
<tr>
<td>Specific activity/attraction</td>
<td>108.2</td>
</tr>
<tr>
<td>Safety</td>
<td>103.1</td>
</tr>
<tr>
<td>Climate</td>
<td>102.6</td>
</tr>
<tr>
<td>Fine dining</td>
<td>102.4</td>
</tr>
<tr>
<td>Cost</td>
<td>101.3</td>
</tr>
<tr>
<td><strong>Reputation</strong></td>
<td><strong>208.3</strong></td>
</tr>
</tbody>
</table>

### High-Propensity Visitors

<table>
<thead>
<tr>
<th>Utility</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>203.5</td>
</tr>
<tr>
<td><strong>Reputation</strong></td>
<td><strong>181.2</strong></td>
</tr>
<tr>
<td>Travel distance (proximity)</td>
<td>129.5</td>
</tr>
<tr>
<td>Ease of access</td>
<td>120.4</td>
</tr>
<tr>
<td>Planning convenience</td>
<td>116.3</td>
</tr>
<tr>
<td>Climate</td>
<td>112.9</td>
</tr>
<tr>
<td>Special events</td>
<td>108.0</td>
</tr>
<tr>
<td>Specific activity/attraction</td>
<td>107.8</td>
</tr>
<tr>
<td>Travel loyalty programs</td>
<td>105.6</td>
</tr>
<tr>
<td>Nightlife</td>
<td>103.3</td>
</tr>
<tr>
<td>Fine dining</td>
<td>102.7</td>
</tr>
<tr>
<td>Cost</td>
<td>100.4</td>
</tr>
</tbody>
</table>
Reputation plays a role in driving success

Q (the coefficient of imitation) has a value 12.85x greater than that of P (the coefficient of innovation)
Sources of information for high-propensity visitors

- Direct mail: Texas HPV 2, US HPV 2
- Periodicals and magazines - print: Texas HPV 54, US HPV 51
- Newspaper - print: Texas HPV 53, US HPV 51
- Radio - satellite and terrestrial: Texas HPV 67, US HPV 53
- Television: Texas HPV 92, US HPV 84
- Peer review web: Texas HPV 116, US HPV 117
- Email: Texas HPV 173, US HPV 188
- WOM: Texas HPV 290, US HPV 295
- Web: Texas HPV 465, US HPV 471
- Mobile web: Texas HPV 494, US HPV 503
- Social media: Texas HPV 560, US HPV 557

Index Value

Talk WITH

Talk AT
Onsite usage of information source
By channel/platform during visits within the past 12 months

- Social media: 54.7%
- Mobile web: 35.4%
- WOM (interpersonal): 30.5%
- Direct mail/brochure: 18.7%
- Peer review web: 9.9%
- Newspaper: 6.5%
- Periodical, magazine, guidebook: 4.8%
- App (resident on device): 4.2%
- Web: 3.8%
Satisfaction by onsite usage of information source
By channel/platform during visits within the past 12 months

- **App (resident on device)**:
  - User: 68.7
  - Non-User: 68.5
  - Change: +0.03%

- **Peer review web**:
  - User: 69.6
  - Non-User: 68.4
  - Change: +2%

- **Direct mail/brochure**:
  - User: 68.9
  - Non-User: 68.1
  - Change: +1%

- **WOM (interpersonal)**:
  - User: 73.2
  - Non-User: 67.8
  - Change: +8%

- **Mobile web**:
  - User: 71.6
  - Non-User: 68.2
  - Change: +5%

- **Social media**:
  - User: 72.5
  - Non-User: 68.4
  - Change: +6%

- **Overall Satisfaction**
  - User: 81.0
  - Non-User: 73.3
  - Change: +6.7%
(Digital) connection does not “belong” to marketing

• Impacts engagement of high-propensity visitors
  (marketing, operations)

• Impacts engagement of members and donors
  (development, membership)

• Impacts engagement of income-qualified audiences
  (outreach, access programs)
Why did you not make a donation?
(Previous $250-$2,500 annual donors who had did not donate again within 24 months)

- Not acknowledged/thanked for previous gift
- Not asked to donate again
- Lack of communication about use of funds/results of gift ("impacts and outcomes")
- Gave instead to another organization
- Unactualized intent ("forgot")
- Dissatisfied with organization
- Dissatisfied with use of previous gift
- Change in financial situation ("couldn't afford")
- Changing interests/priorities
- Solicitation overreach ("asked too often" and/or "asked for too much" after previous gift)

The diagram shows a comparison between Texas Former Donors and US Former Donors.

INDEX VALUE

- Not acknowledged/thanked for previous gift: Texas 255.4, US 243.9
- Not asked to donate again: Texas 193.9, US 198.7
- Lack of communication about use of funds/results of gift: Texas 171.5, US 174.2
- Gave instead to another organization: Texas 132.2, US 120.0
- Unactualized intent ("forgot"): Texas 128.6, US 138.1
- Dissatisfied with organization: Texas 99.5, US 84.7
- Dissatisfied with use of previous gift: Texas 91.9, US 91.9
- Change in financial situation ("couldn't afford"): Texas 84.2, US 78.3
- Changing interests/priorities: Texas 63.5, US 95.5
- Solicitation overreach ("asked too often" and/or "asked for too much" after previous gift): Texas 61.7, US 58.8
“Digital” is integrated into our engagement strategy, because it is integrated into visitor motivation and experiences.

Understanding how people think is everyone’s job.
2) Entertainment vs. education

What role do these values play in motivating visitation?
Visiting a(n) [organization type] is …

US visitors

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>Entertaining</th>
<th>Educational</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historic Site</td>
<td>65</td>
<td>72</td>
</tr>
<tr>
<td>History Museum</td>
<td>73</td>
<td>72</td>
</tr>
<tr>
<td>Art Museum</td>
<td>72</td>
<td>71</td>
</tr>
<tr>
<td>Aquarium</td>
<td>71</td>
<td>72</td>
</tr>
<tr>
<td>Zoo</td>
<td>76</td>
<td>70</td>
</tr>
<tr>
<td>Science Center</td>
<td>77</td>
<td>69</td>
</tr>
<tr>
<td>Orchestra or Symphony</td>
<td>72</td>
<td>68</td>
</tr>
</tbody>
</table>

Mean Value

STRONGLY AGREE

STRONGLY DISAGREE
I primarily visit ... to be entertained.
I primarily visit History Museums and Historic Sites to learn and/or be educated.

- **History Museums**
  - US Composite: 44
  - Texas Composite: 43

- **Historic Sites**
  - US Composite: 47
  - Texas Composite: 47
## Overall Satisfaction by Adult Generational Cohort

<table>
<thead>
<tr>
<th>EVALUATION CRITERIA</th>
<th>WEIGHT</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment experience</td>
<td>0.2083827</td>
<td>20.84%</td>
</tr>
<tr>
<td>Favorability</td>
<td>0.1973655</td>
<td>19.74%</td>
</tr>
<tr>
<td>Admission value</td>
<td>0.1392858</td>
<td>13.93%</td>
</tr>
<tr>
<td>Employee courtesy</td>
<td>0.1058746</td>
<td>10.59%</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>0.0839291</td>
<td>8.39%</td>
</tr>
<tr>
<td>Crowd control</td>
<td>0.0693879</td>
<td>6.94%</td>
</tr>
<tr>
<td>Parking</td>
<td>0.0685503</td>
<td>6.86%</td>
</tr>
<tr>
<td>Food service</td>
<td>0.0483722</td>
<td>4.84%</td>
</tr>
<tr>
<td>Educational experience</td>
<td>0.0476664</td>
<td>4.77%</td>
</tr>
<tr>
<td>Retail</td>
<td>0.0311855</td>
<td>3.12%</td>
</tr>
<tr>
<td><strong>OVERALL SATISFACTION (COMPOSITE)</strong></td>
<td><strong>1.0000000</strong></td>
<td><strong>100.00%</strong></td>
</tr>
</tbody>
</table>
YOU KEEP USING THAT WORD
I DO NOT THINK IT MEANS WHAT YOU THINK IT MEANS
What was the primary purpose of your visit to the … ?

- Learn something new/different: 143.2
- See something new/different: 133.5
- Want child to learn something new/different: 112.8
- Want child to have cultural experience: 110.0
- Share time with family: 103.3
- Specific activity, exhibit, or event: 90.6
- Share time with friends: 81.7
Taking a young child to visit a … gives the child an “edge” or “advantage” in their academic or intellectual development.
We want to be educational, NOT entertaining!

Entertainment motivates visitation, education value justifies a visit.

“Entertainment” does not necessarily mean “vapid” or “joyful.”
3) Scale vs. personalization

*How can we “welcome all” by “welcoming each?”*
Personal facilitated experiences

A PFE is a one-to-one or one-to-few interaction between a staff member or volunteer and an individual, couple, or small family.
Employee courtesy

Overall: 71
Affirmative PFE: 76
Entertainment experience

Overall: 68
Affirmative PFE: 74
Educational experience

Overall: 71
Affirmative PFE: 76
Overall satisfaction by daypart

<table>
<thead>
<tr>
<th>Time Period</th>
<th>PFE</th>
<th>Non-PFE</th>
</tr>
</thead>
<tbody>
<tr>
<td>9-10a</td>
<td>72</td>
<td>67</td>
</tr>
<tr>
<td>10-11a</td>
<td>70</td>
<td>63</td>
</tr>
<tr>
<td>11a-12p</td>
<td>67</td>
<td>61</td>
</tr>
<tr>
<td>12-1p</td>
<td>66</td>
<td>61</td>
</tr>
<tr>
<td>1-2p</td>
<td>66</td>
<td>62</td>
</tr>
<tr>
<td>2-3p</td>
<td>67</td>
<td>63</td>
</tr>
<tr>
<td>3-4p</td>
<td>68</td>
<td>66</td>
</tr>
<tr>
<td>&gt;4p</td>
<td>70</td>
<td>66</td>
</tr>
</tbody>
</table>

Impacts
Personal interactions play a critical role in "welcoming all" by "welcoming each"

* Self-curation means allowing for personalized experiences based on interest, not necessarily sending everyone off with just a map or an app.
4) With vs. what

Let’s consider how we think about “telling stories.”
What is the best thing about a visit?

- Time with family and friends: 303.2
- Seeing/interacting with exhibits/performance: 119.6
- Interacting with staff/volunteers/performers: 111.8
- Learning something new: 78.2
- Enjoying a day off from work/school: 69.7
- Visiting a new place: 55.3
- Peace and quiet ("sanctuary from hectic day"): 34.5
Overall Satisfaction by Best Visit Attribute

OVERALL SATISFACTION

MORE LIKELY

75
70
72
69
70
70

LESS LIKELY

Time with family and friends
Exhibits/performance
Staff/volunteers/performers
Learn something new
Day off work/school
Visiting a new place

"THE BEST THING ABOUT A VISIT TO A CULTURAL ORGANIZATION"
Value for Cost by Best Visit Attribute

Time with family and friends: 76%
Exhibits/performance: 71%
Staff/volunteers/performers: 72%
Learn something new: 68%
Day off work/school: 69%
Visiting a new place: 70%

"THE BEST THING ABOUT A VISIT TO A CULTURAL ORGANIZATION"
Intent to Re-Visit Within One Year by Best Visit Attribute

The best thing about a visit to a cultural organization is:

- Time with family and friends: 59%
- Exhibits/performance: 47%
- Staff/volunteers/performers: 49%
- Learn something new: 41%
- Day off work/school: 48%
- Visiting a new place: 39%
We make stories (by telling stories)
Content is king
Connection is king
The Visitor Engagement Cycle
Building affinity and securing visitation

- **CONNECTION (Offsite)**
  - Connectivity facilitates this, too!

- **RELEVANCE (Onsite)**
  - Connectivity aids this!

- **Satisfaction (TELL OTHERS)**
  - Connectivity drives this!

- **Reputation (VISIT)**
Engagement trends are not about this
They are about this
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...

cdilenschneider@impactsresearch.com

@cdilly
twitter.com/cdilly

facebook.com/colleendilen

Colleen Dilenschneider

Know Your Own Bone
colleendilen.com

linkedin.com/in/colleendilenschneider

Colleen Dilenschneider