Understanding Potential Visitors

And How To Get Them Through The Door!

Real Places 2019

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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.

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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

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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%

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

Utility	Index
Schedule	147.9
Cost	121.3
Travel distance (proximity)	120.5
Special events	118.8
Reputation	**117.5**
"Family-friendly"	116.4
Nightlife	110.0
Climate	107.7
"Friends and family"	105.3
Safety	102.6
Specific activity/attraction	101.9
Ease of access	100.2

Western Europe

Utility	Index
Reputation	**208.3**
Schedule	140.1
Special events	137.8
Ease of access	127.7
Planning convenience	118.0
Nightlife	116.5
Travel distance (proximity)	108.7
Specific activity/attraction	108.2
Safety	103.1
Climate	102.6
Fine dining	102.4
Cost	101.3

High-Propensity Visitors

Utility	Index
Schedule	203.5
Reputation	**181.2**
Travel distance (proximity)	129.5
Ease of access	120.4
Planning convenience	116.3
Climate	112.9
Special events	108.0
Specific activity/attraction	107.8
Travel loyalty programs	105.6
Nightlife	103.3
Fine dining	102.7
Cost	100.4

Reputation

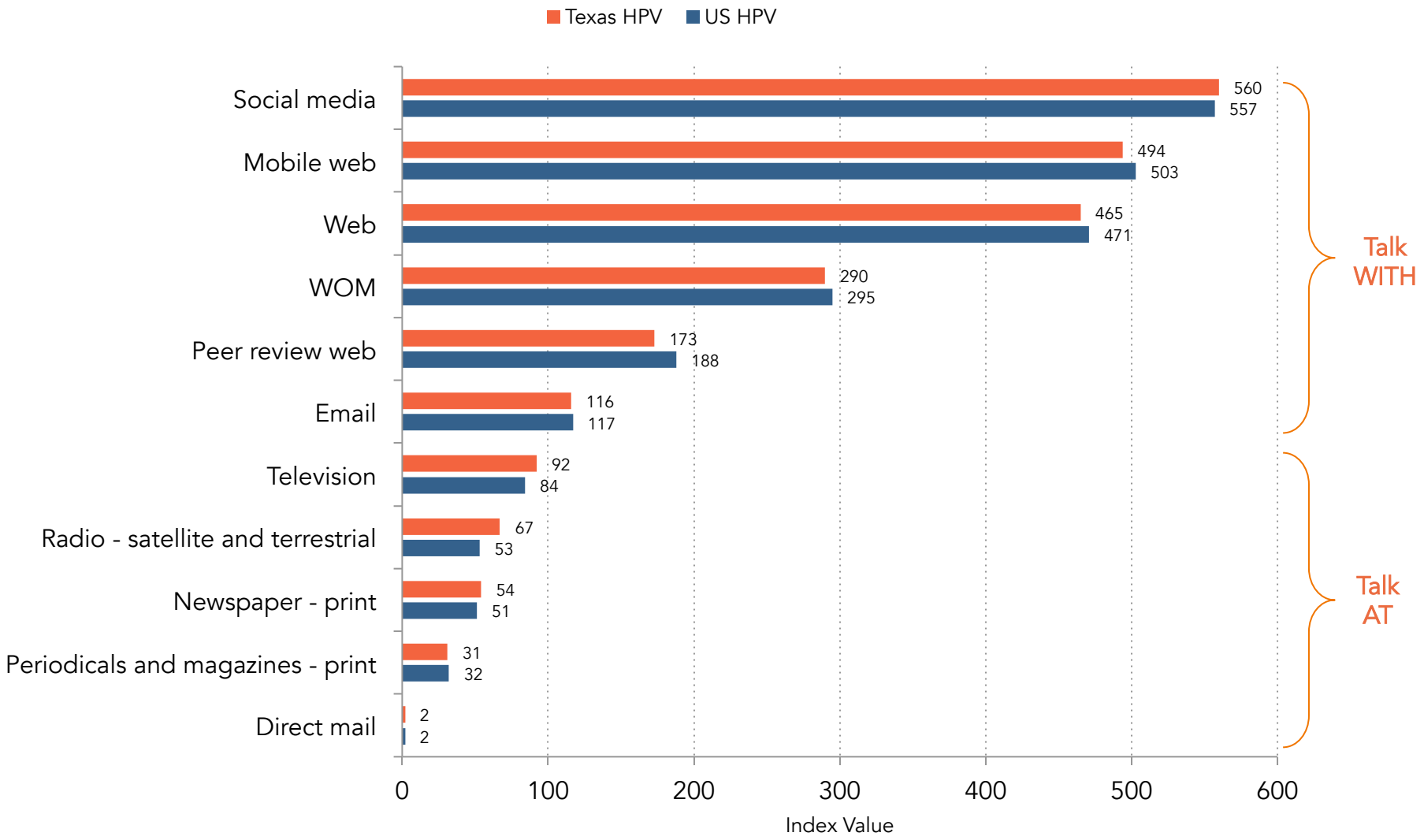
Reputation plays a role in driving **success**

Paid Media
Advertising
Broadcast
Cable
Radio
Online
Cinema

Trusted sources
Peer reviews
Word of mouth
Interpersonal
Social media
Earned media

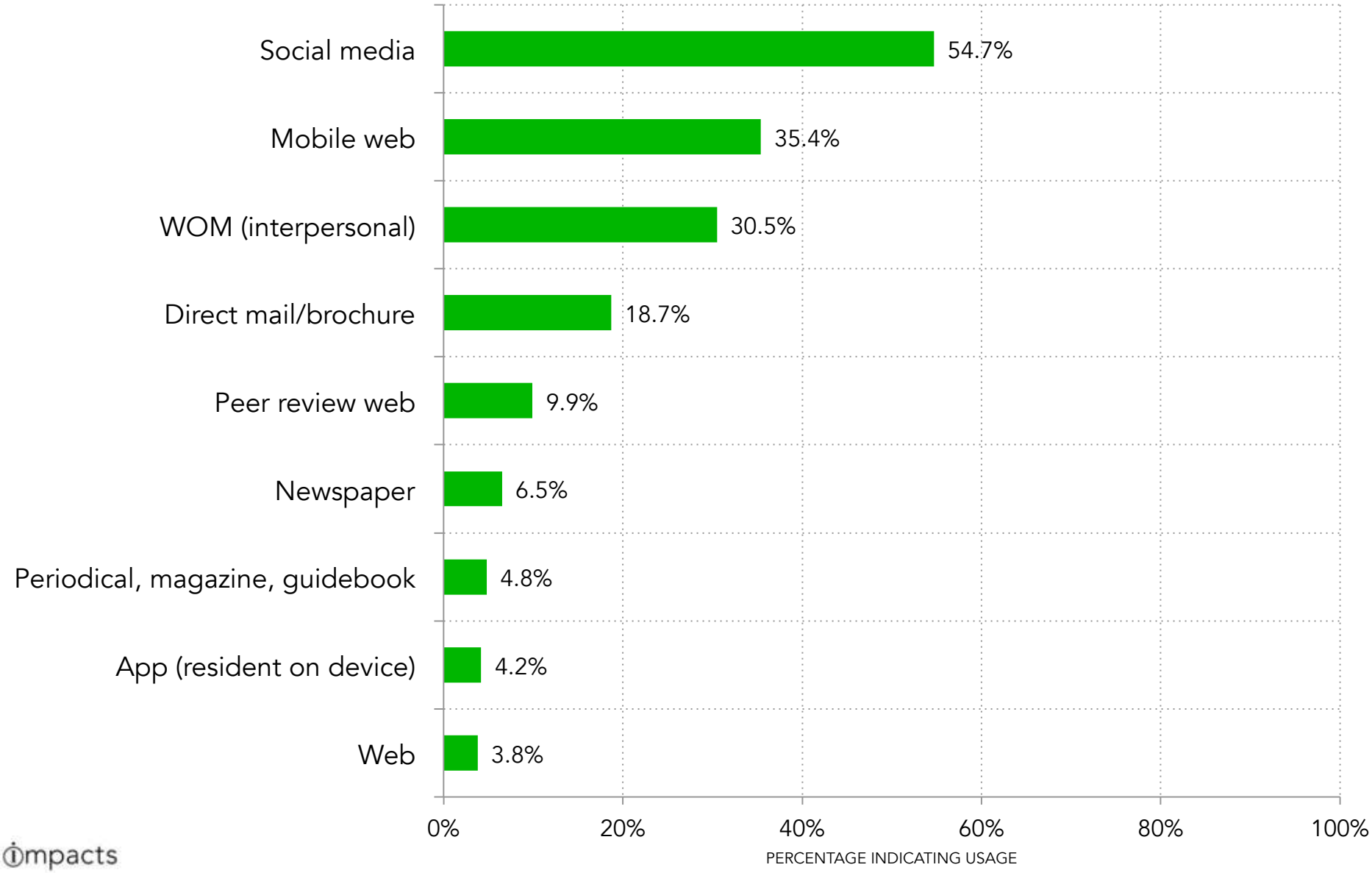
Q (the coefficient of imitation) has a value **12.85x** greater than that of **P** (the coefficient of innovation)

Sources of information for high-propensity visitors



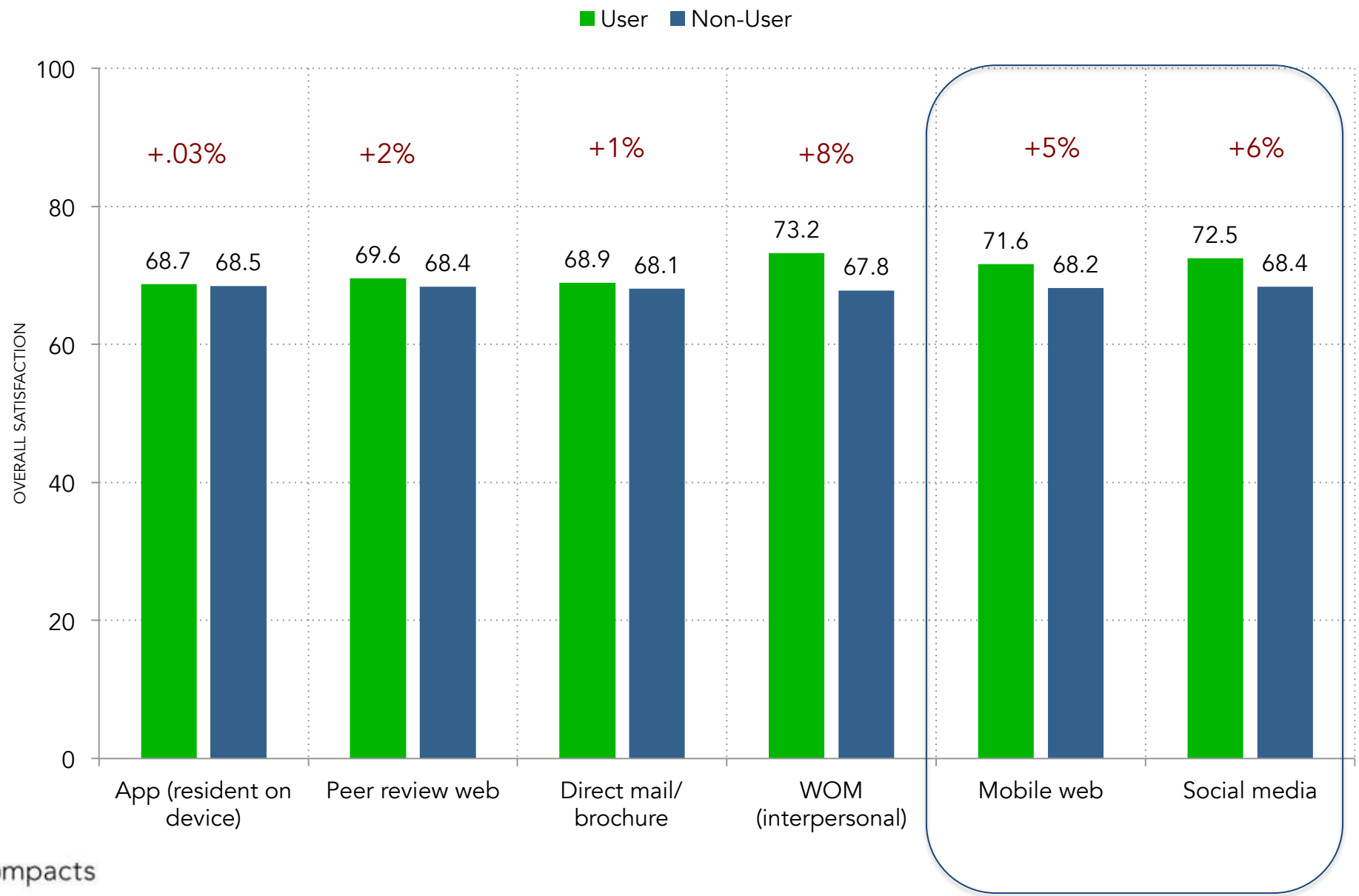
Onsite usage of information source

By channel/platform during visits within the past 12 months



Satisfaction by onsite usage of information source

By channel/platform during visits within the past 12 months



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(Digital) connection does not “belong” to marketing

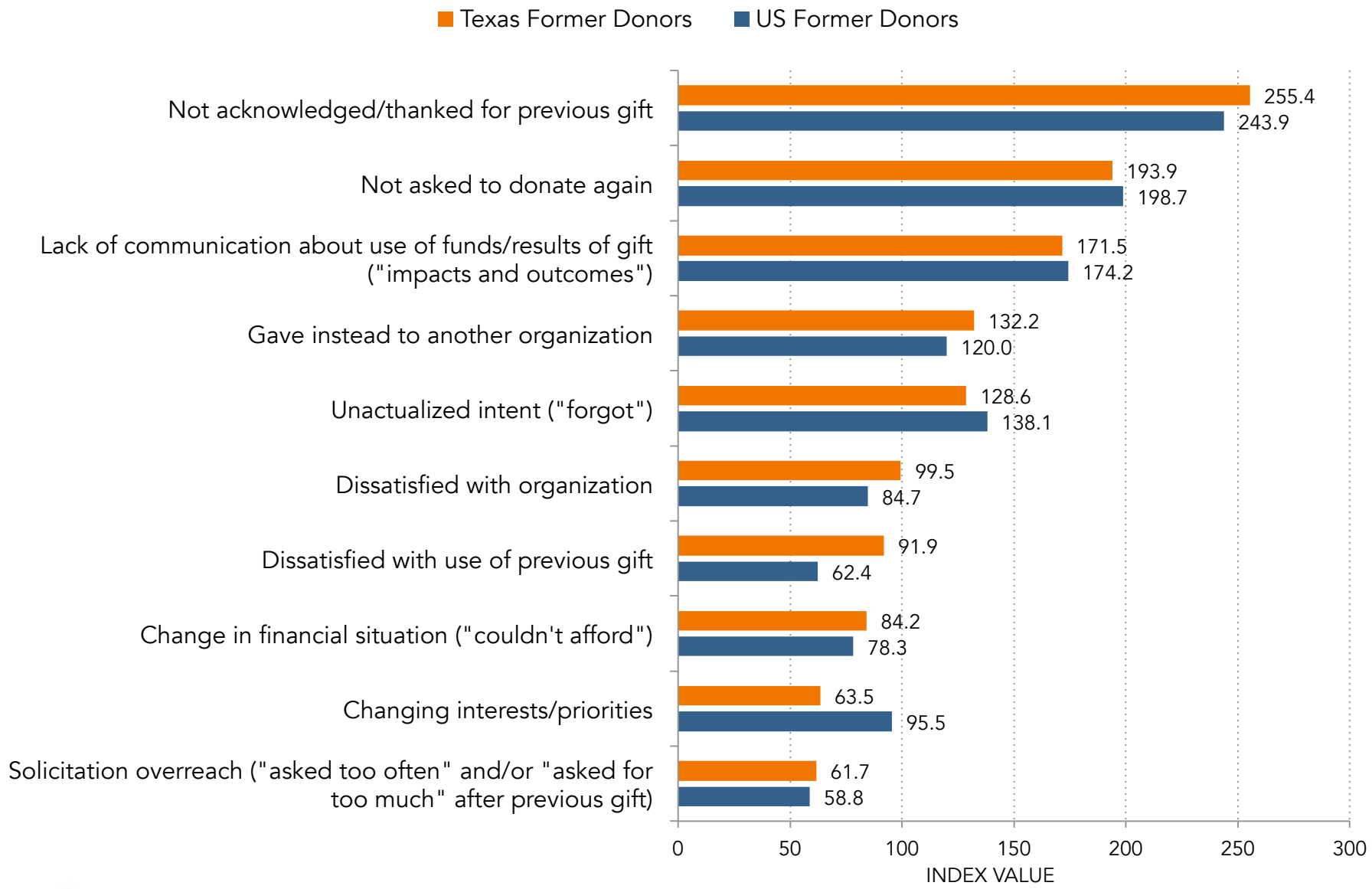
- Impacts engagement of high-propensity visitors
  (marketing, operations)

- 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)



~~"Digital" is an add-on to our engagement strategy.~~

~~I don't know too much about it. It's mostly someone else's job.~~

"Digital" is integrated into our engagement strategy, because it is integrated into visitor motivation and experiences.

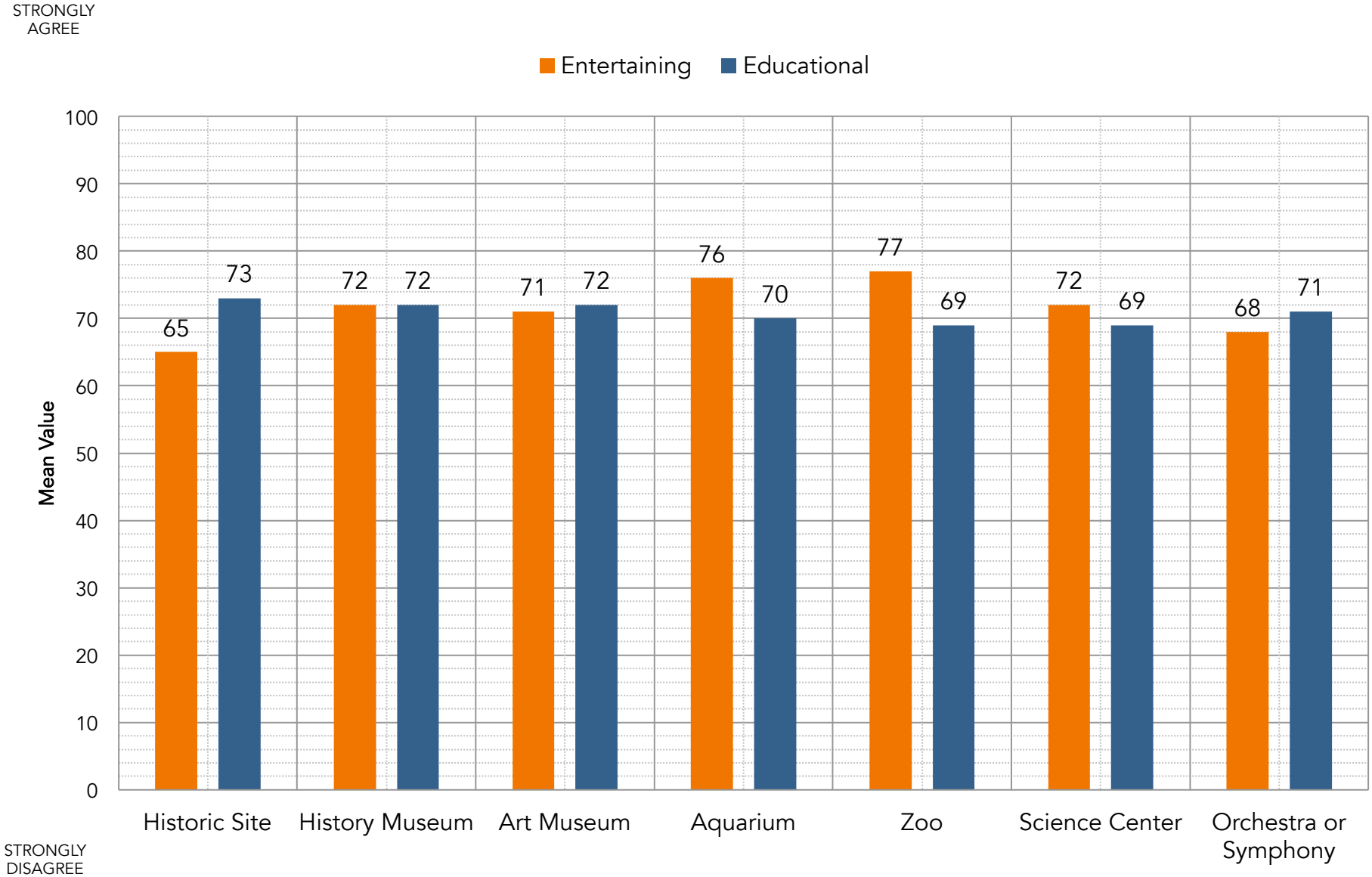
Understanding how people think is everyone's job.

2) Entertainment vs. education

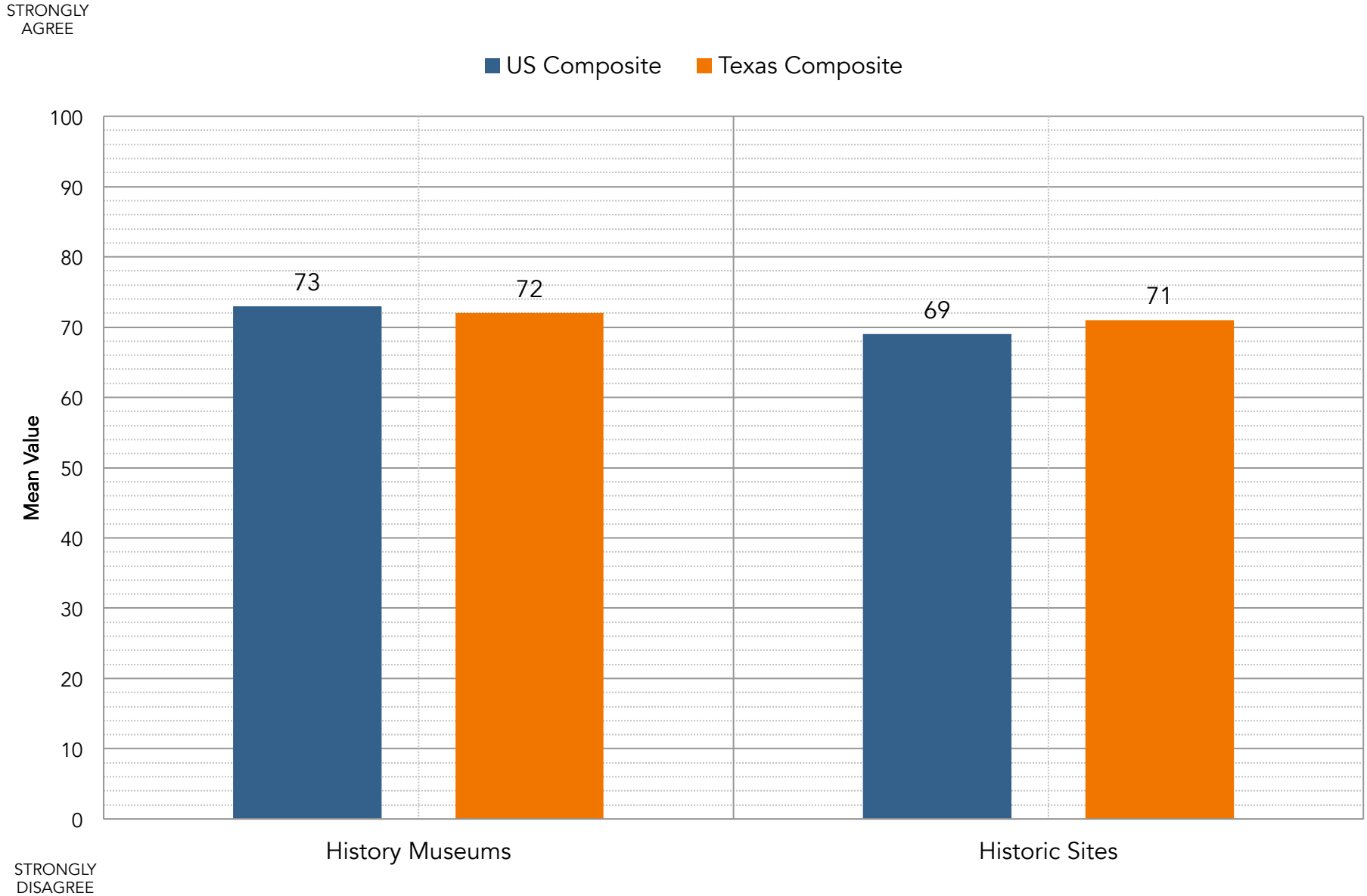
What role do these values play in motivating visitation?

Visiting a(n) [organization type] is …

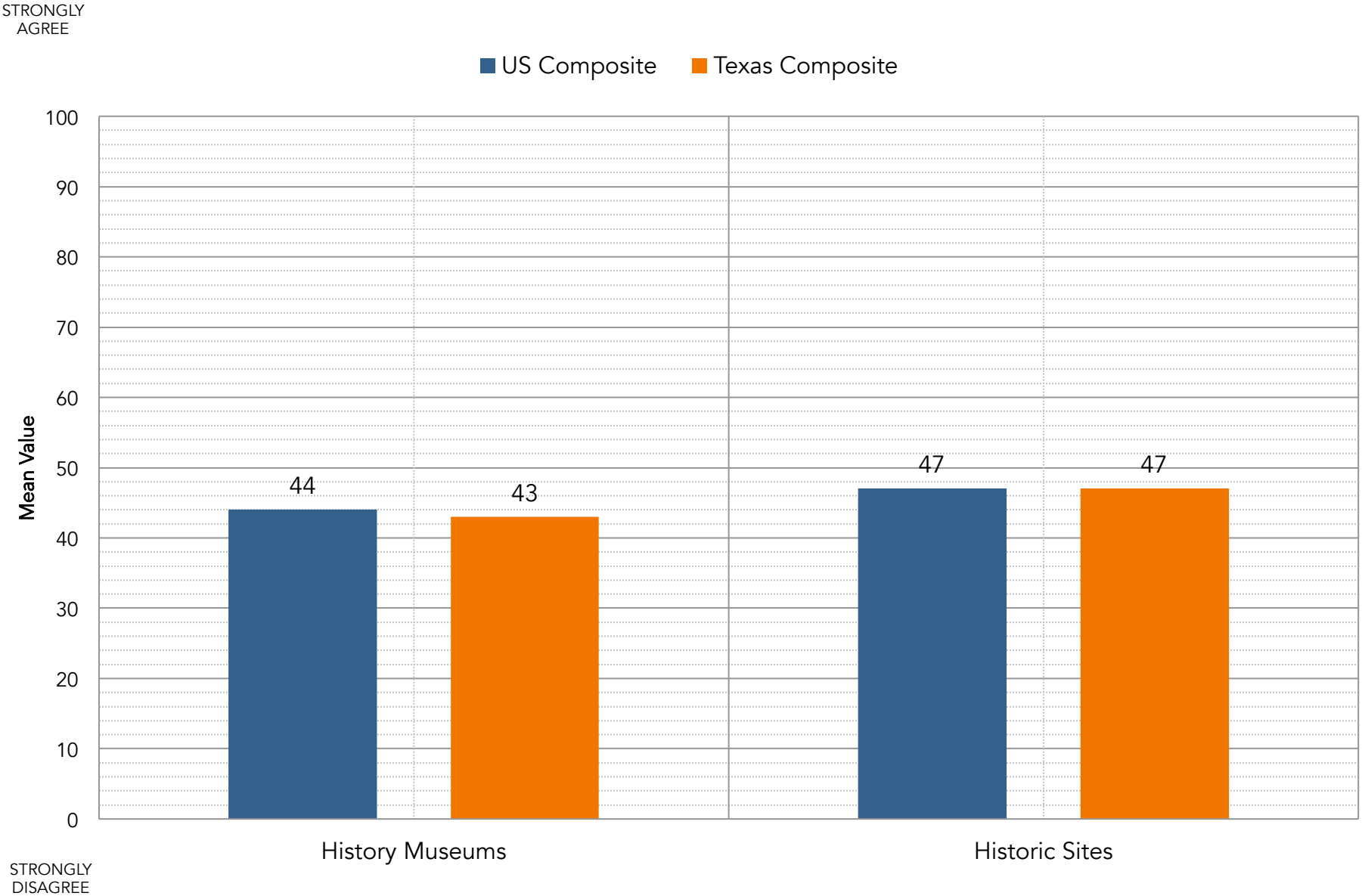
US visitors



I primarily visit … to be entertained.



I primarily visit … to learn and/or be educated.



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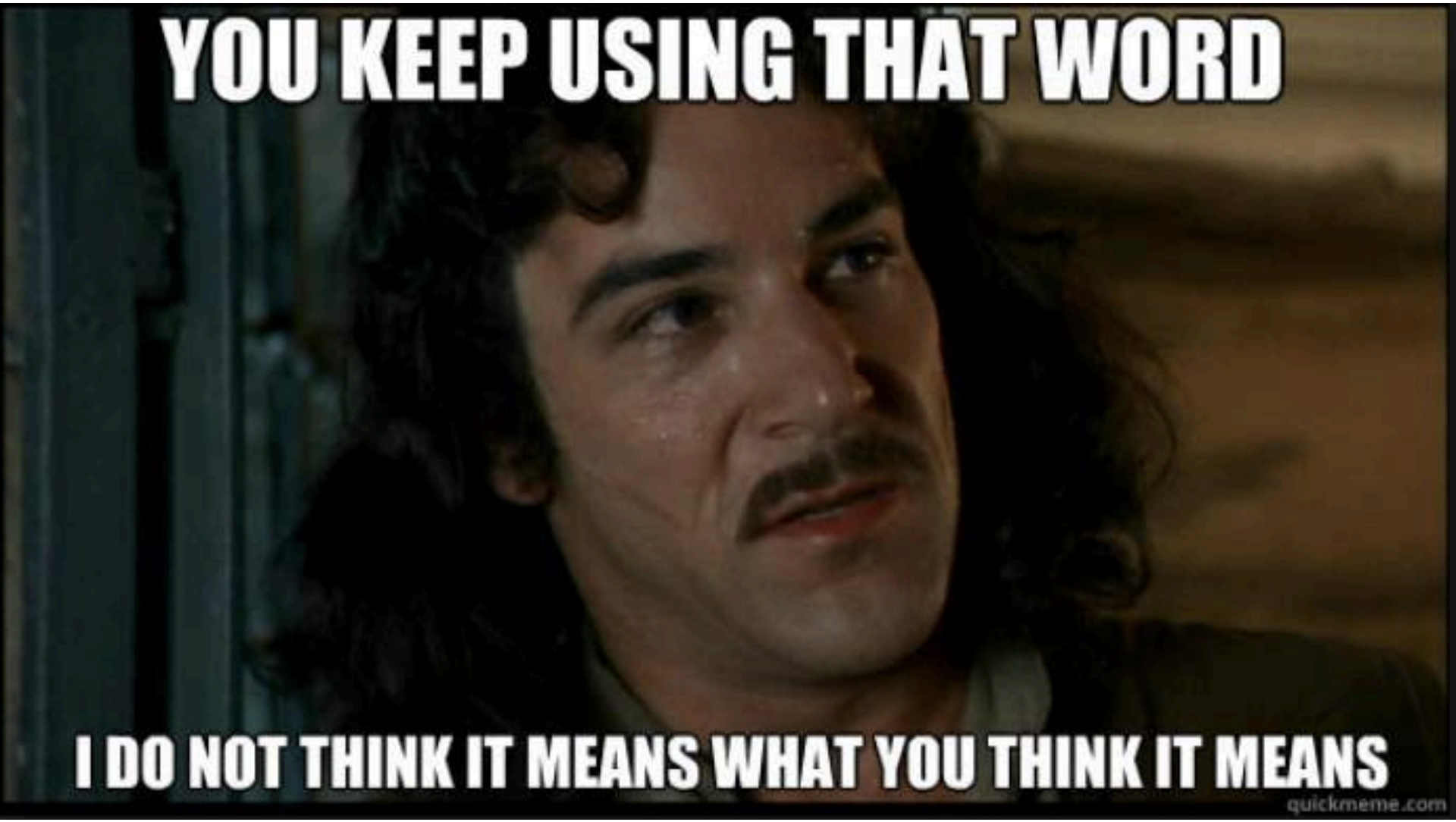
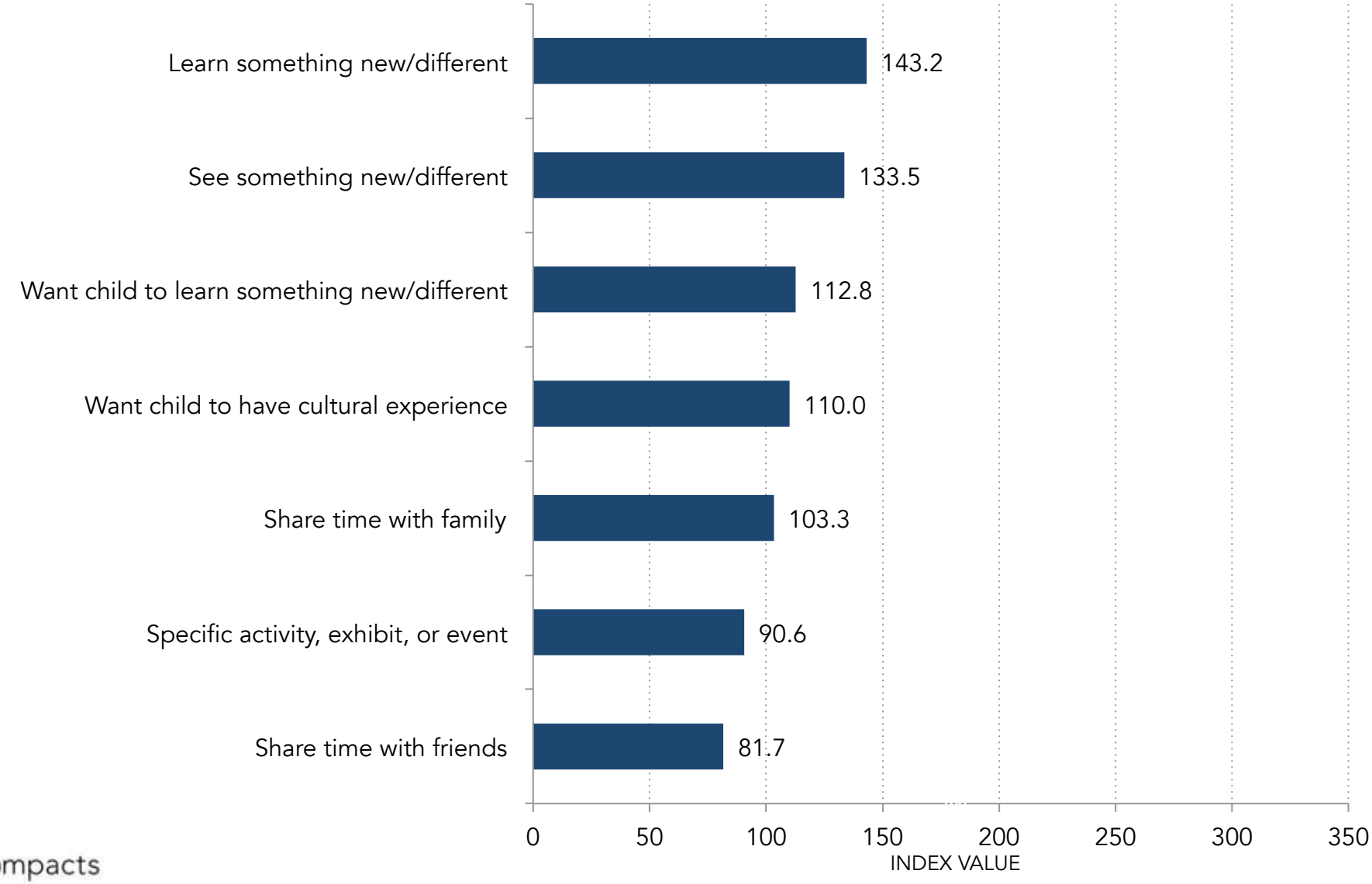
Overall Satisfaction by Adult Generational Cohort

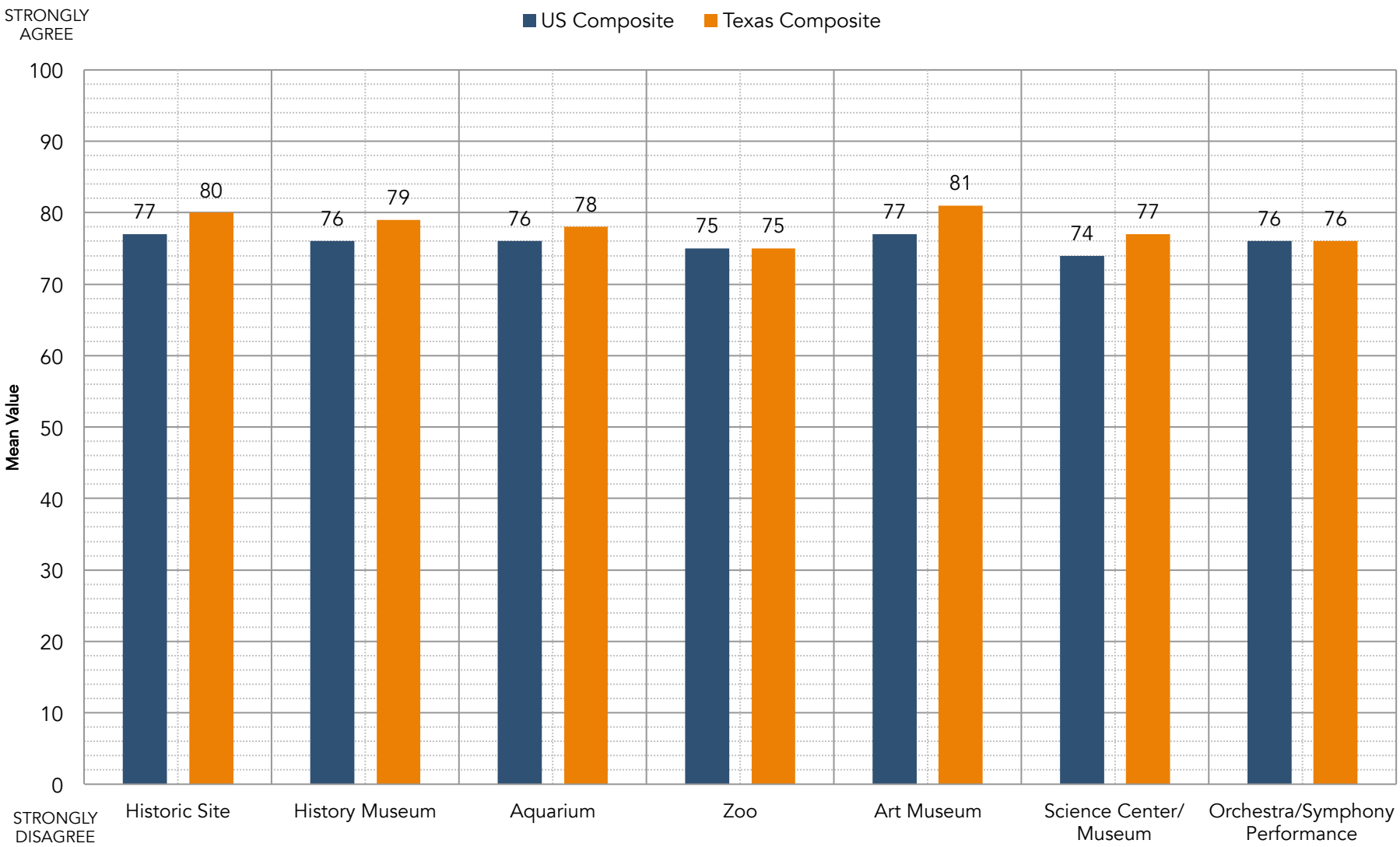
EVALUATION CRITERIA	WEIGHT	%
Entertainment experience	0.2083827	20.84%
Favorability	0.1973655	19.74%
Admission value	0.1392858	13.93%
Employee courtesy	0.1058746	10.59%
Cleanliness	0.0839291	8.39%
Crowd control	0.0693879	6.94%
Parking	0.0685503	6.86%
Food service	0.0483722	4.84%
Educational experience	0.0476664	4.77%
Retail	0.0311855	3.12%
OVERALL SATISFACTION (COMPOSITE)	1.0000000	100.00%


YOU KEEP USING THAT WORD
I DO NOT THINK IT MEANS WHAT YOU THINK IT MEANS
quickmeme.com

What was the primary purpose of your visit to the … ?



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."

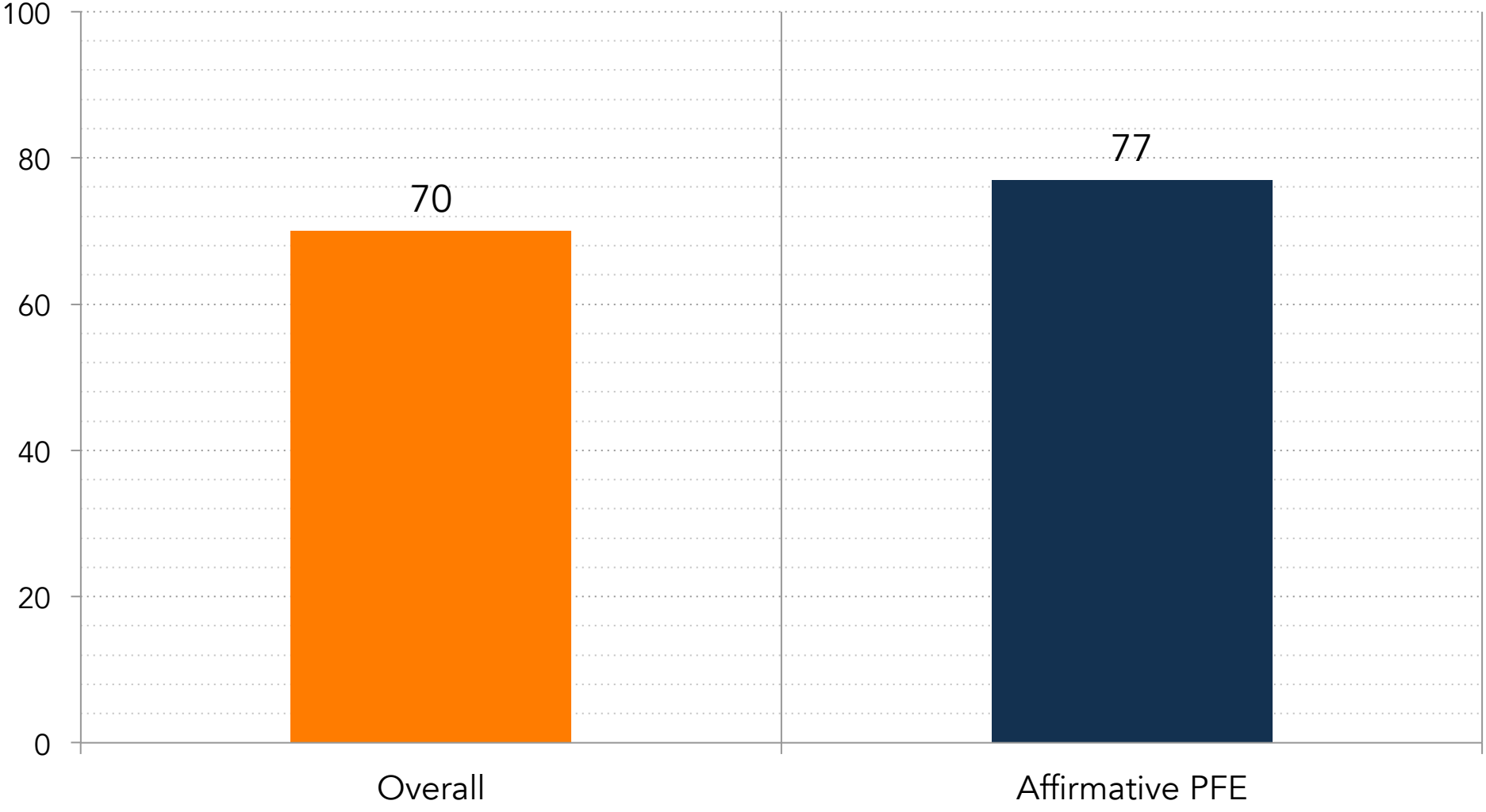
3) Scale vs. personalization

How can we "welcome all" by "welcoming each?"

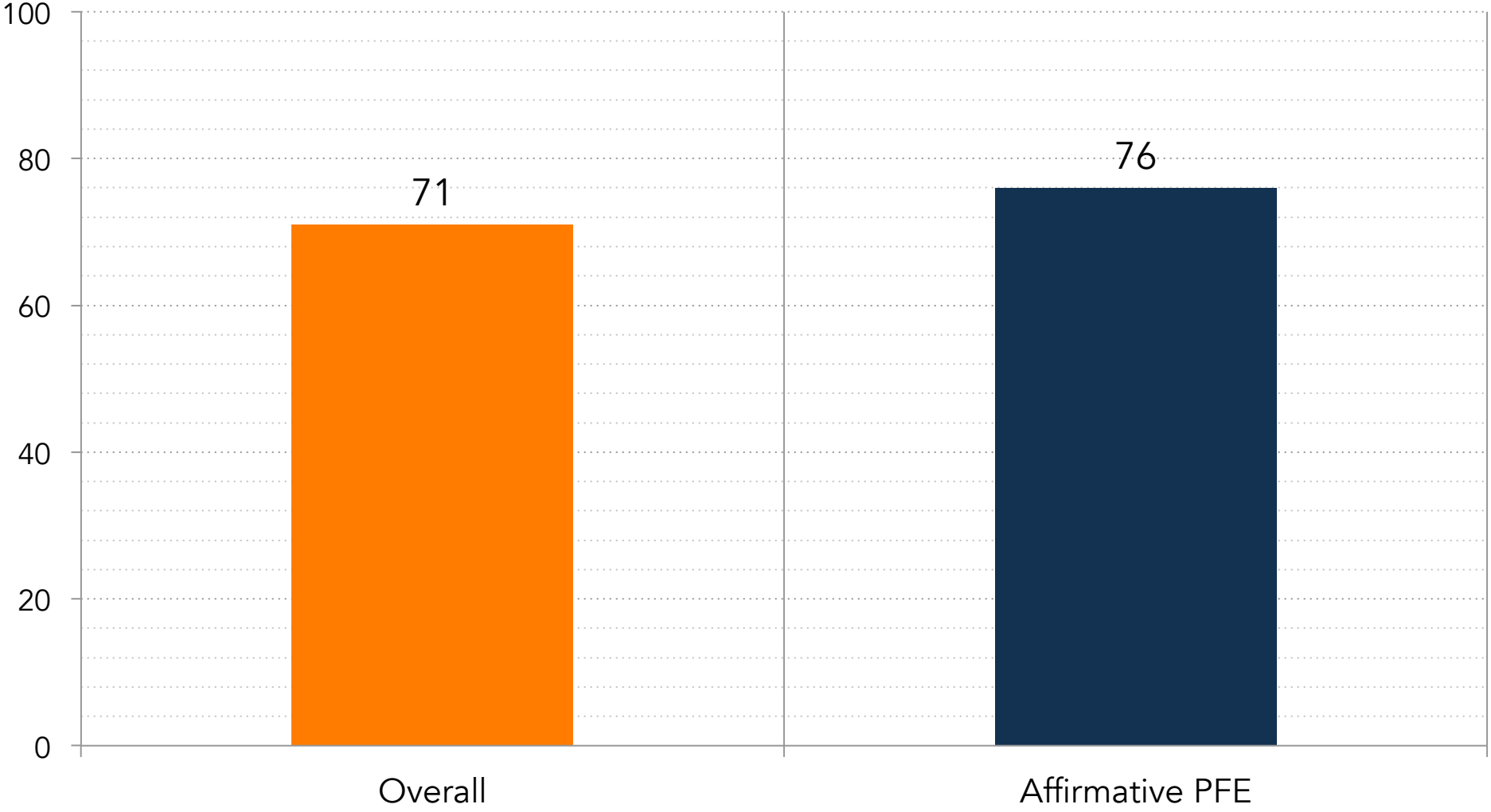
Personal facilitated experiences

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.

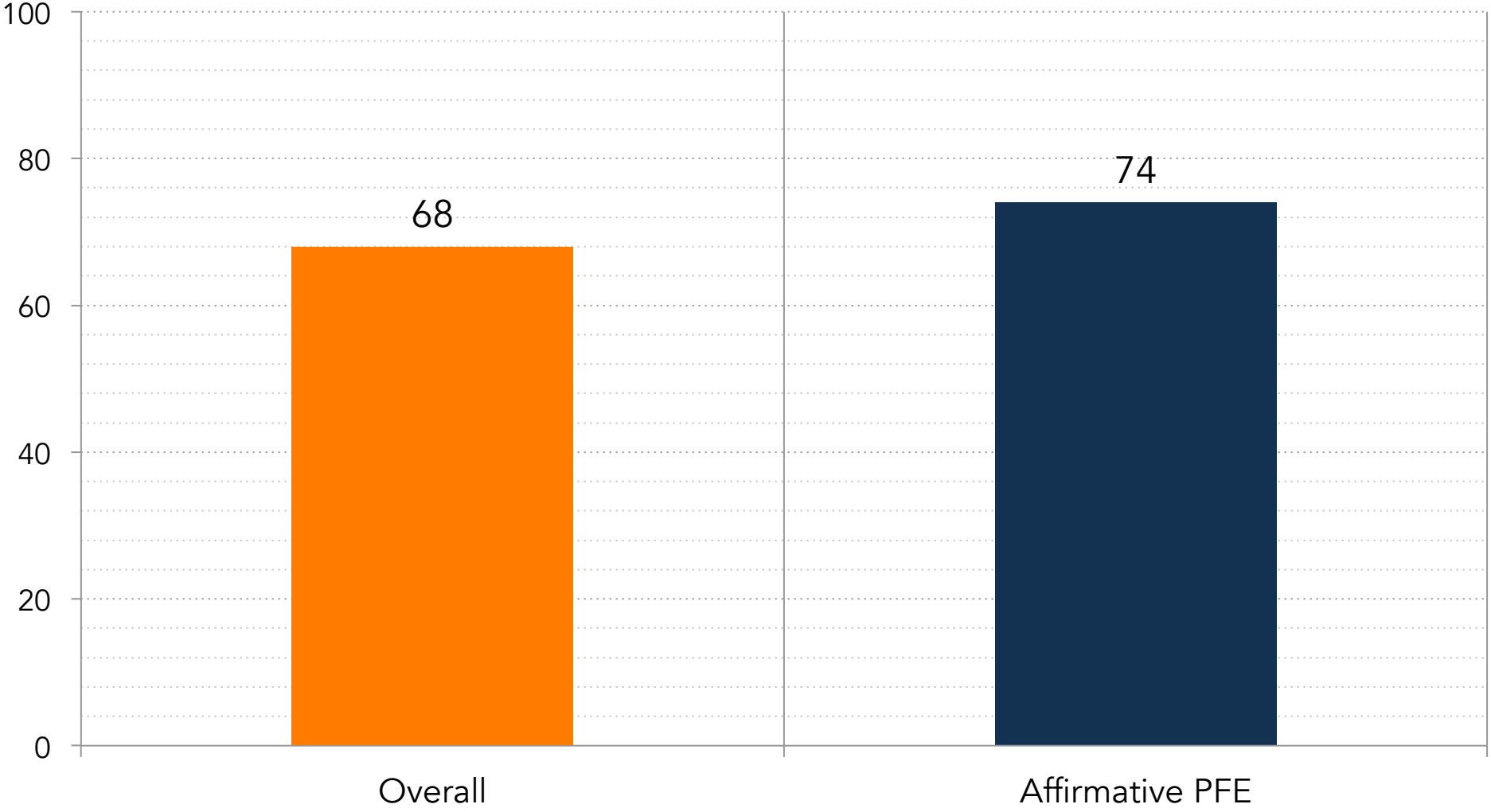
Admission value



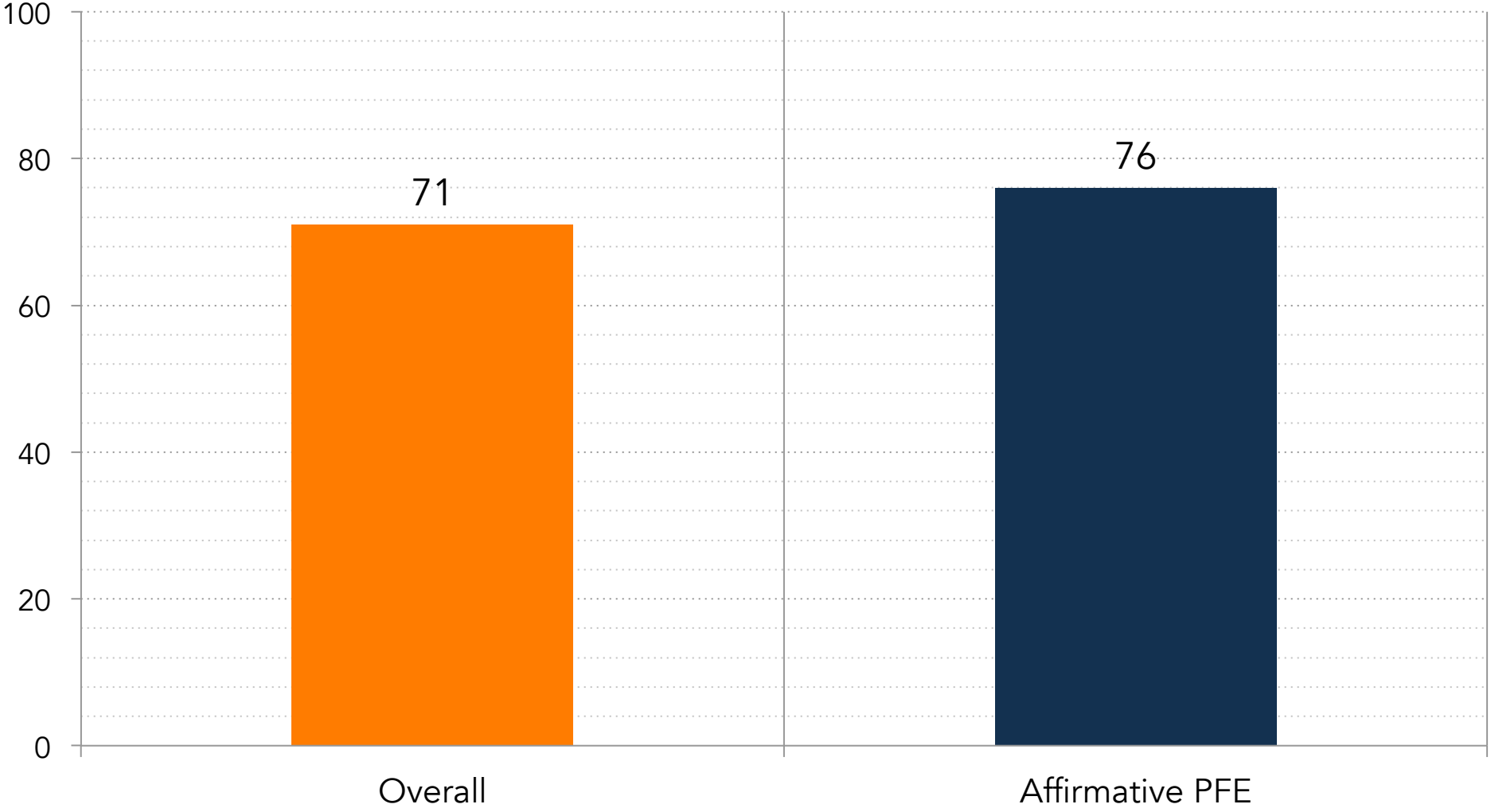
Employee courtesy



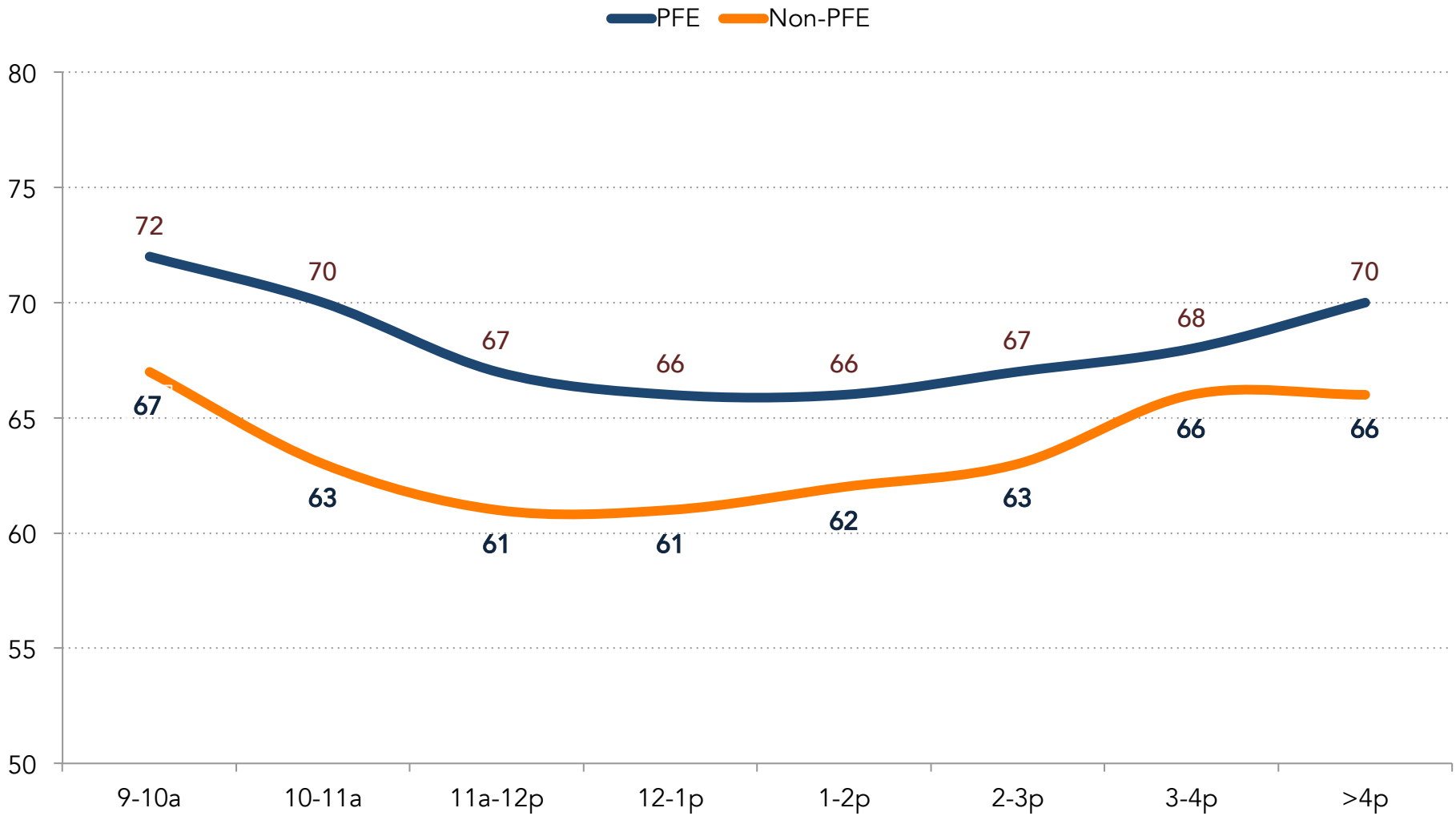
Entertainment experience



Educational experience



Overall satisfaction by daypart



~~We welcome everyone by providing the same, scheduled opportunities for everyone!~~

~~Self-curation is so hot right now!~~

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

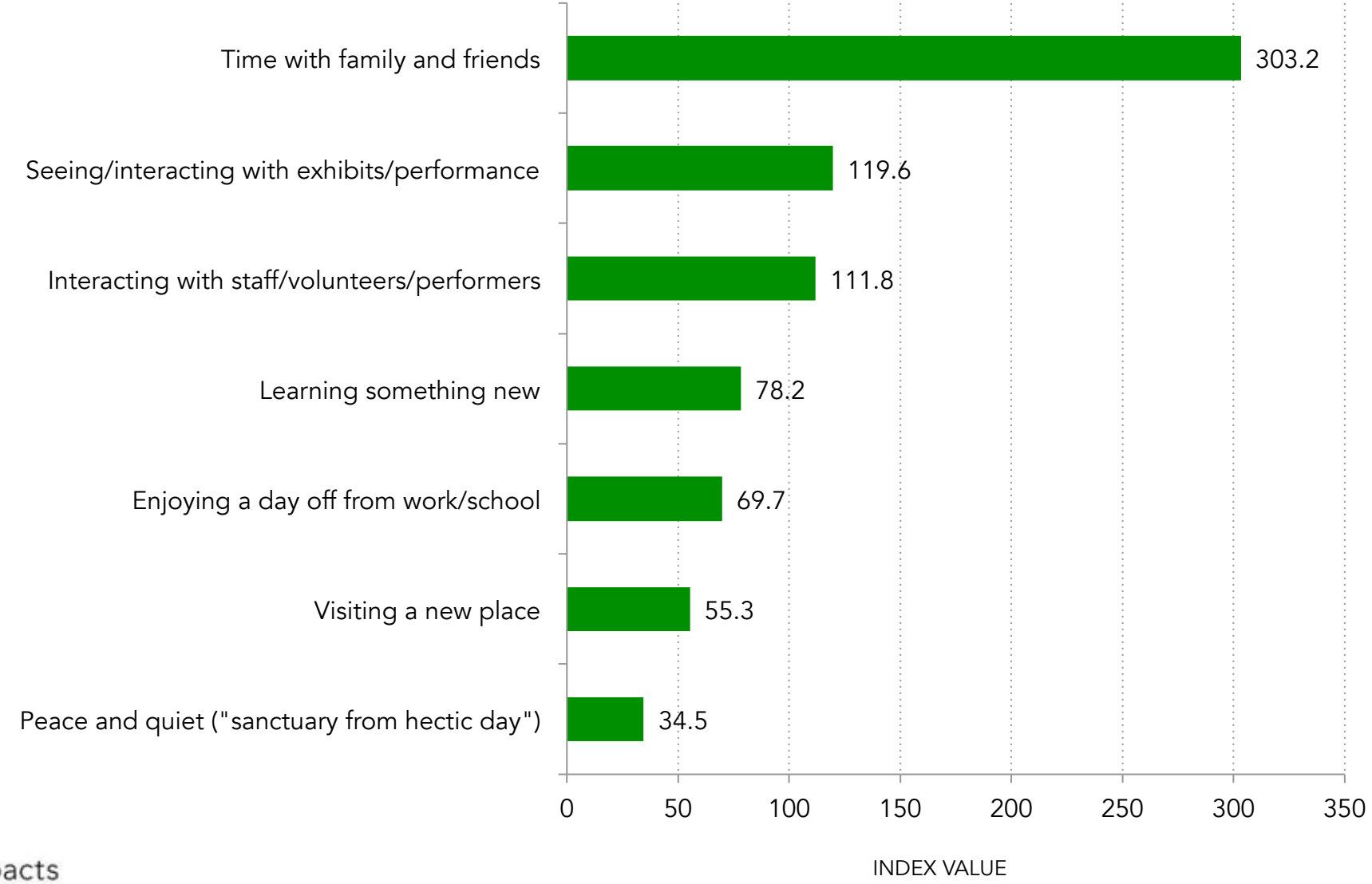
* Self-curation means allowing for personalized experiences based on interest, not necessarily sending everyone off with just a map or an app.

4) With vs. what

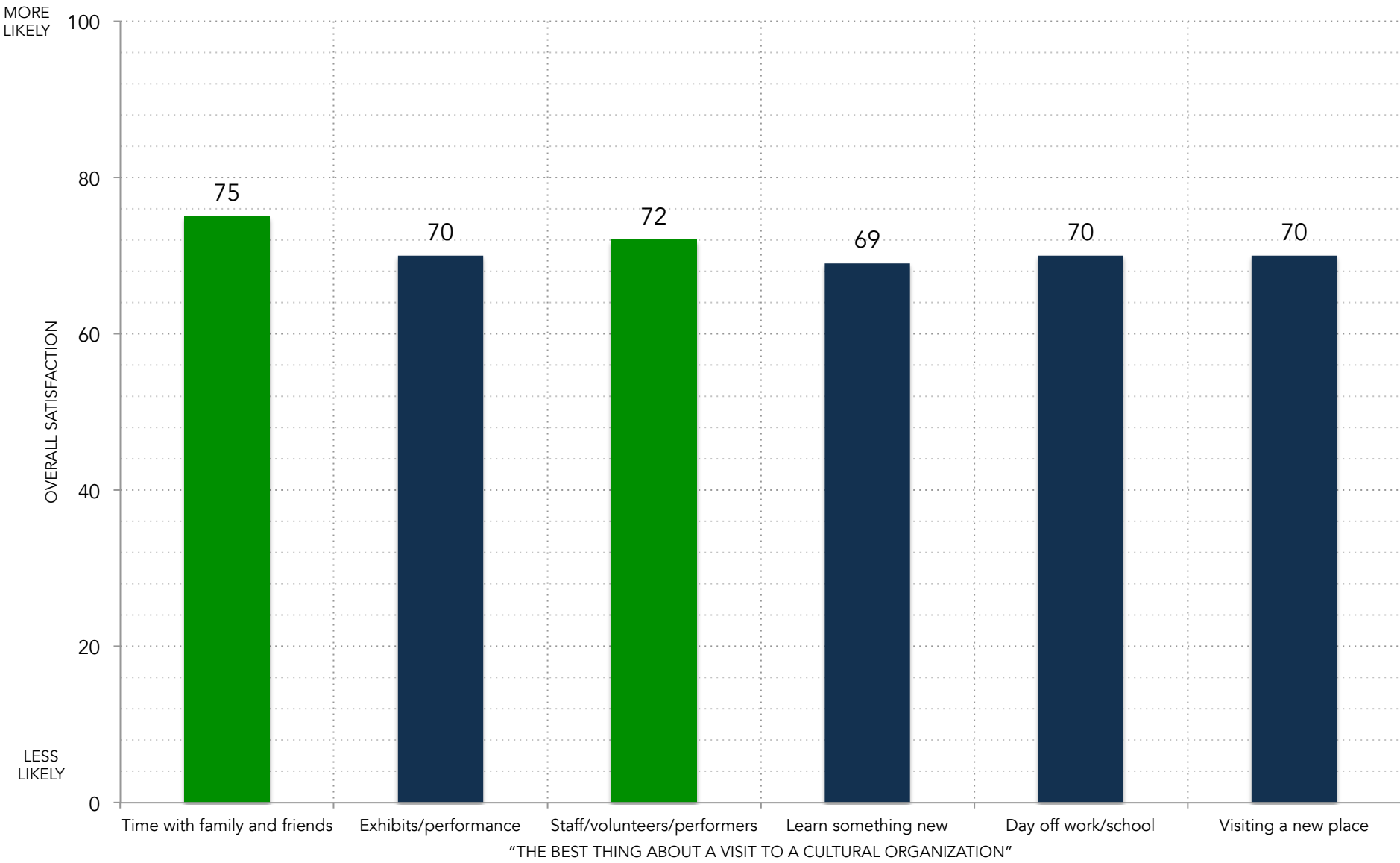
Let's consider how we think about "telling stories."

What is the best thing about a visit?

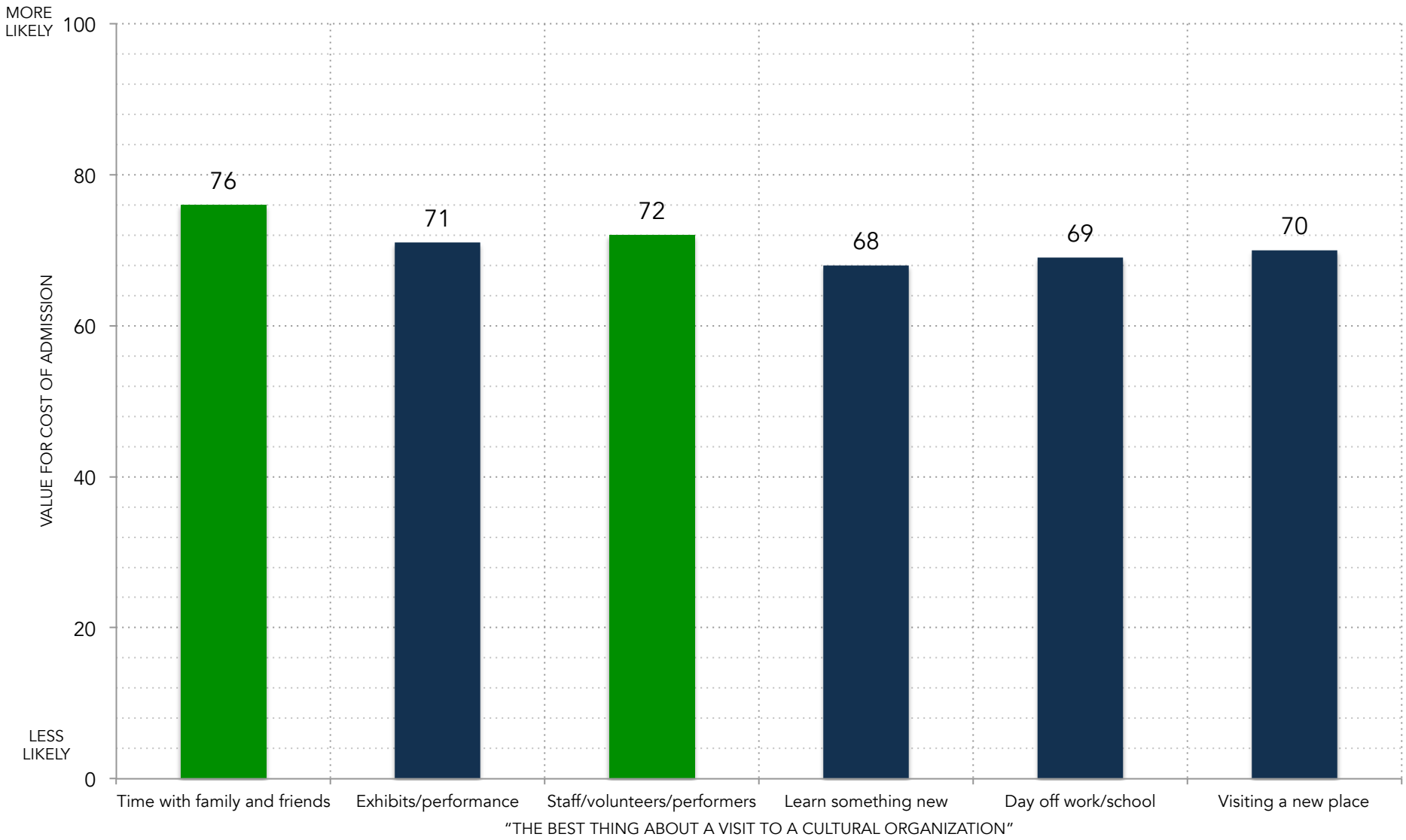
With > what



Overall Satisfaction by Best Visit Attribute



Value for Cost by Best Visit Attribute



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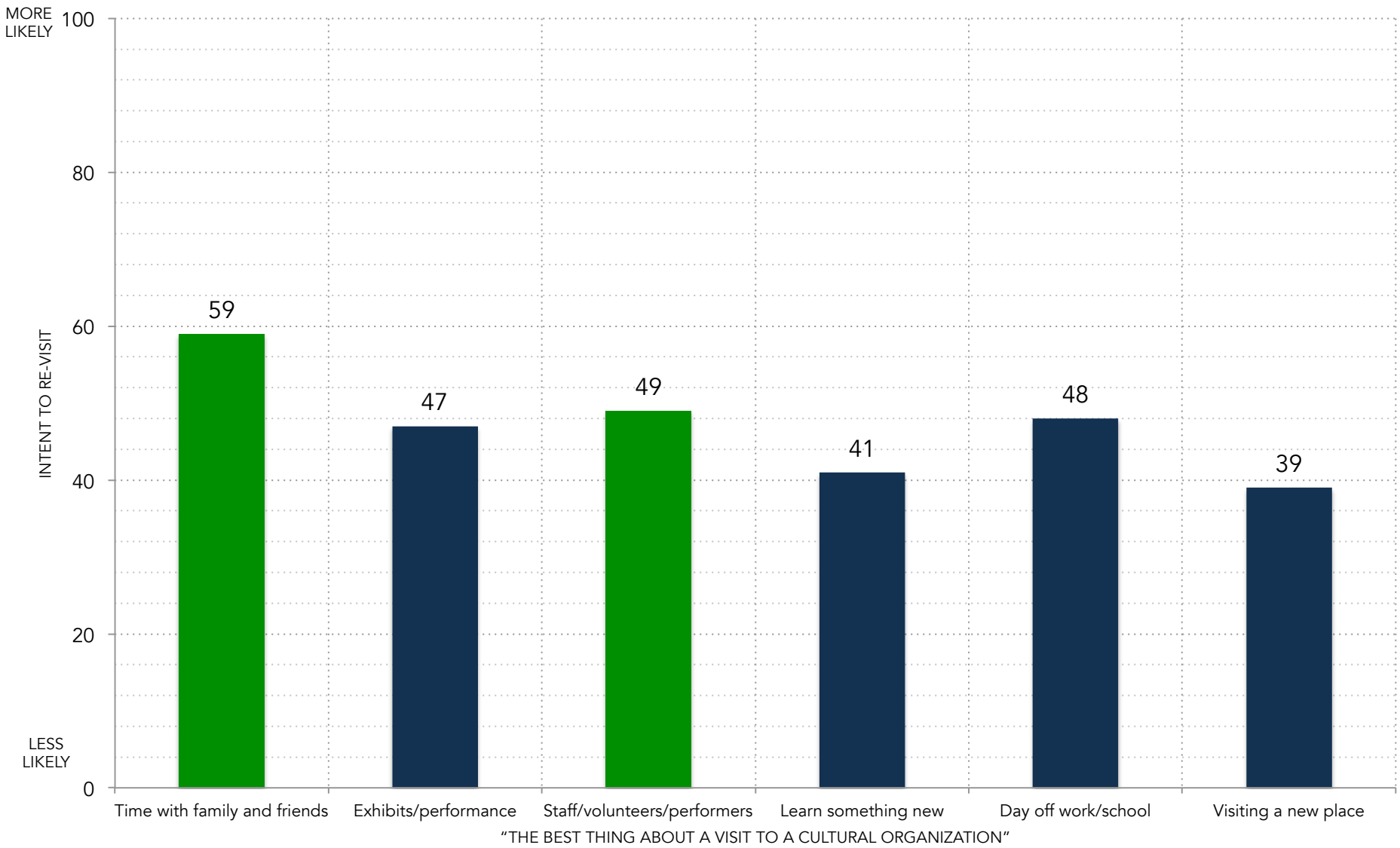
Intent to Re-Visit Within One Year by Best Visit Attribute



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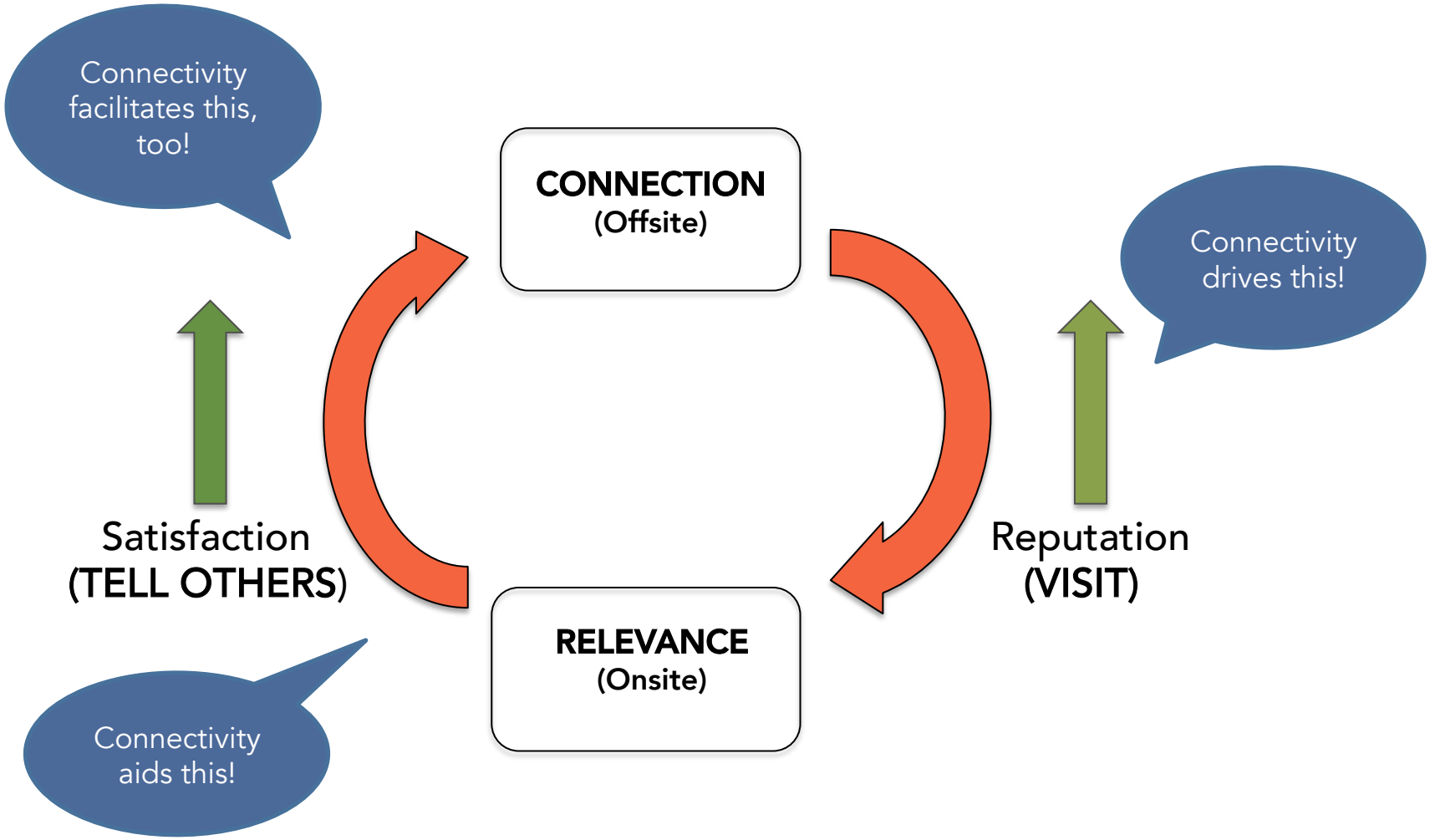
~~We tell stories!~~

We make stories (by telling stories)

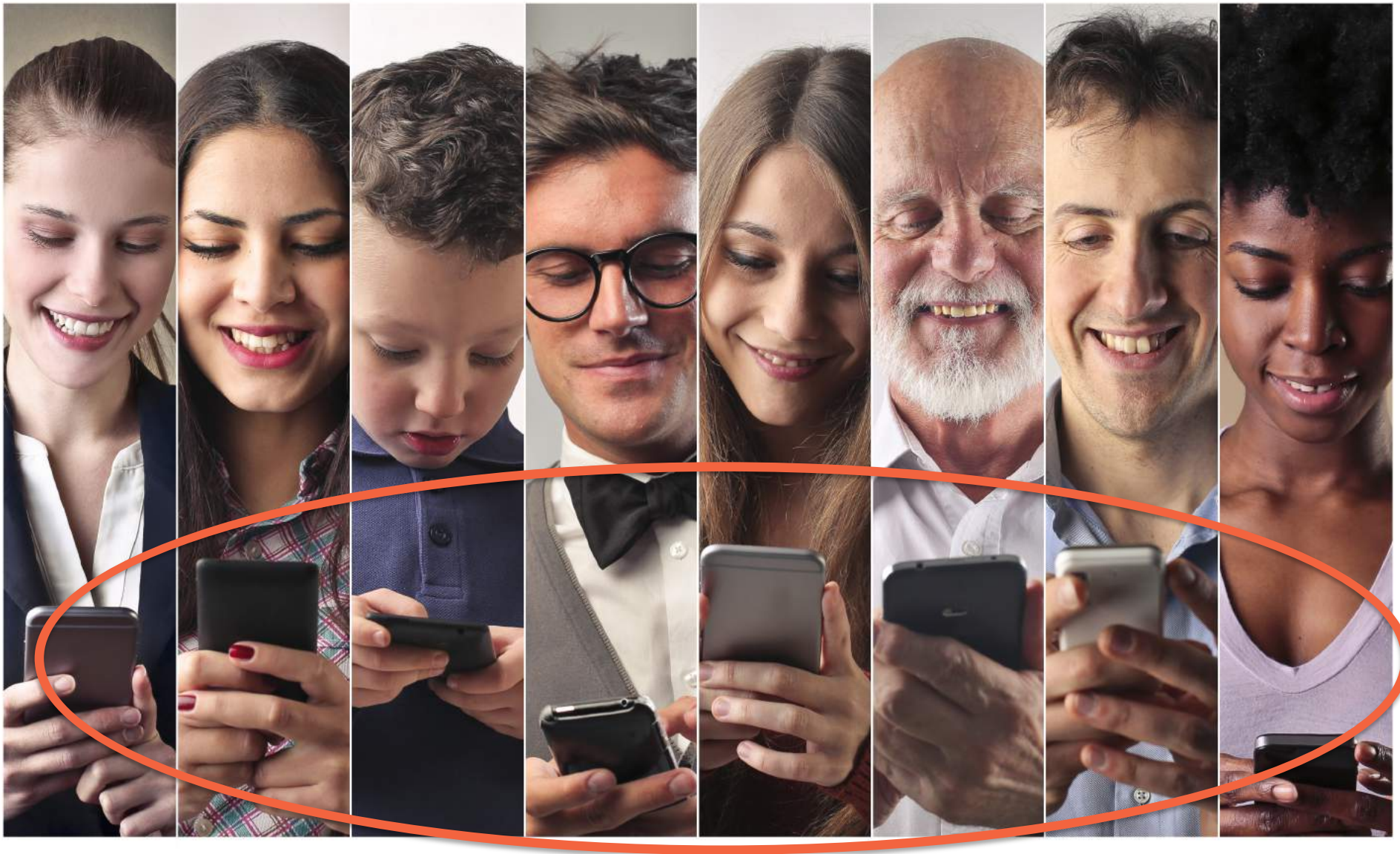
~~Content is king~~
Connection is king

The Visitor Engagement Cycle

Building affinity and securing visitation



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…

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