Audiences: Four Trends

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The Research

- Field-wide visitors surveys
  - 2007 ACM (n>5,000 from 33 US museums)
  - 2008 outdoor history (n>5,500 from 13 US museums)
  - 2008 ASTC (n>14,400 respondents from 50 museums in 4 countries)
  - 2008 CT Cultural Consumers (n>4,400 respondents from 24 CT cultural orgs)

- Consumer research / demographic analysis
  - 2008 lifestyle survey (n=2,275 adults in 20s and 30s)
  - 10,000s households for client work
Audience Issues Worth Watching

- Older Men
- Audience Diversity
- Gen Y women
- Parents today, especially moms
Older Men

Photo Credit: Mystic Seaport
Older Men

- Men over age 60
- More responsive than female peers in outdoor history study
- Similarly responsive as female peers in science museum study
Older Men

- Generally happy audience

- Most likely to be a member
  - Top reasons:
    - Improving the museum
    - Supporting community organization

- Significantly better educated, more affluent
  - 50% more likely to have advanced degrees than young moms
Older Men

- Visit with:
  - Spouse, 79%
  - Alone, 20%

- Generally do not visit with minor children/grandchildren

- History buffs, science buffs
Older Men

- Seeking experiences that are:
  - Self-curated
  - Deeper
  - Individual
  - Adult-oriented
  - Concrete

- Love to go behind the scenes

- Have very specific interests

Photo Credit: Mystic Seaport
Older Men

- At outdoor history museums:
  - Blacksmithing
  - Railroads
  - Farm machinery
  - Building stuff
  - Rigging ropes

- Not as keen on costumed interpretation, formal activities

Photo: Genesee Country Village and Museum
Older Men

- Visit science museums because:
  - Curious
  - Science presented well
  - Fun

- About personal interest in science

- Want more adult-oriented content, programming
  - Forum for science dialog
  - Weighing risks, tradeoffs
Older Men

- Tend to be a very happy audience
  - Emotionally connected
  - Most engaged
  - Seeking self-curated experiences
  - Making a long-term commitment to museums

... an under-tapped opportunity?
Audience Diversity
Audience Diversity

... or lack thereof

- Core museum audience:
  - ACM: 91% Caucasian
  - OHM: 97% Caucasian
  - ASTC: 88% Caucasian
  - CT: 93% Caucasian

- US population: 66% Caucasian
Already majority minority (CA, HI, NM, TX + DC)
Soon to be majority minority (AZ, GA, MD, MS, NY)

+ America’s youth population will be majority minority within 15 years
Audience Diversity

1900s - 1970s
10-13% minority population

25 years ago
20% minority population

Now
34% minority population

25 years ahead
46% minority population

Core museum visitors today
9% minority

Source: US Census Bureau and Reach Advisors surveys of >30,000 core museum visitors from >100 museums
Projected population growth next 25 years

Audience Diversity

- Mixed race
- Hispanic
- Asian
- American Indian
- Black
- Caucasians
While museums do well with Caucasian, Asian American, Mixed Race, and American Indian audiences . . .

. . . . museums are falling short with African American, Hispanic audiences

How can museums better reflect their communities?
Generation Y Women
Generation Y Women

Curating their lives

- Creative, aesthetic
  - More likely to customize stuff
  - Engaged in arts, crafts

- Much more likely to visit museums than:
  - Gen Y men
  - Gen Y moms
Generation Y Women

The reverse gender gap

- 70% of girls who graduate high school go to college
- 60% of those graduating college are women
- College graduation: 1.5x female/male ratio
### Generation Y Women

Population with college degrees

<table>
<thead>
<tr>
<th>Gender</th>
<th>25 years ago</th>
<th>Today</th>
<th>25-29 years old</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>23%</td>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>Women</td>
<td>16%</td>
<td>28%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Source: US Census Bureau
While American women who work full time earn 79% of men...

...but in most major metros, women in 20s now earn 100-120% of men

# of women earning >$50K than spouse up >2x this decade
Generation Y Women

- Longer time as single women?
- Postponement of children?
- Increasing involvement of grandparents in children’s lives?
- Stay-at-home dads?
- Impact on museums that serve families?
Moms (and Dads)
Moms in 30s, 40s

- Caucasian
- Oldest child:
  - 2 – 4 for children’s museums
  - 6 – 12 for outdoor history
  - 5 – 13 for science museums
  - <10 for CT cultural consumers
- Above average income
- College educated
- Repeat visitors
- Less likely to be members
- Focused on children

Photo: Fairfield Museum and History Center
Moms – Why They Visit

- Learning – top reason to visit
  - 65% visit children’s museums for learning opportunities
  - 81% visit science museums for learning opportunities
  - 59% visit outdoor history museums for family learning
  - 70% visit CT museums for family learning
  - Versus 64% of all visitors to “gain knowledge”

- Family time
  - It’s about family time...not just the kids
  - But only 1/3 bring spouse to outdoor history museums, CT museums

Sources: Wallace Foundation/Urban Institute and Reach Advisors Analysis
Family Audiences

What’s missing here?

*Mom’s* interests.

Who is also missing?

Dad.
Where Is Dad?

- Only 1/3 of moms visit with spouse
  - “My husband really doesn’t like these outdoor museums”
  - “... impatient husband”

- Moms more likely to respond to surveys than dads
  - 4x more likely for ASTC, outdoor history
  - 6x more likely for CT Cultural Consumers
  - 9x more likely for ACM
Engaged Dads

- Dads that do respond:
  - Generally older kids, teens who are very engaged
  - Perhaps dad is rather important . . .

Photo: Historic Deerfield
<table>
<thead>
<tr>
<th>ACM</th>
<th>OHM</th>
<th>ASTC</th>
<th>CT</th>
</tr>
</thead>
<tbody>
<tr>
<td>40% help children’s organizations</td>
<td>23% help history organizations</td>
<td>15% help science organizations</td>
<td>29% help cultural organizations</td>
</tr>
<tr>
<td>34% help museum improve</td>
<td>39% help museum improve</td>
<td>32% help museum improve</td>
<td>43% help museum improve</td>
</tr>
<tr>
<td>56% pay for services received</td>
<td>44% pay for services received</td>
<td>54% pay for services received</td>
<td>48% pay for services received</td>
</tr>
<tr>
<td>48% to save money</td>
<td>60% to save money</td>
<td>59% to save money</td>
<td>53% to save money</td>
</tr>
<tr>
<td>1% because they “were asked”</td>
<td>0% because they “were asked”</td>
<td>1% because they “were asked”</td>
<td>2% because they “were asked”</td>
</tr>
</tbody>
</table>
Moms: Focused on “Child-Friendly” Museums

- Percentage of moms responding goes up based on perception of “child-friendliness”

- Moms in 30s, 40s were:
  - 72% of children’s museum respondents
  - 44% of science museum respondents
  - 23% of outdoor history museum museum respondents
  - 22% of CT cultural consumer respondents

- But when children’s museums were removed from CT Study:
  - Moms only 10% of respondents to art museums, historical societies, historic house museums
Interpretation Preferences

Action, action, action

At outdoor history museums:

- 81%: Historically costumed staff
- 90%: Hands-on activities
- 87%: Demonstrations
- 80%: Live re-enactments
The Challenge of Guided Tours

- Only 32% of moms enjoy guided tours

- Perception: not age-appropriate
  - “With 2 young children, it's easier to do it on our own. I don't want them to disturb others on the tour.”
  - “I have a 4 year old and a two year old and an impatient husband.”
What Moms Would Love to do Instead

At historic sites:

- Active role-playing
  - “Be able to take part in the eating of the meal, or sleeping in the beds, or reading of the books. Be a part not just spectator.”
  - “I would live there for a month, wearing period clothes, growing, cooking and eating period foods, engaged in period activities.”

- First-person interpretation
  - “I always think it is fun for kids and grown-ups to see how people lived and worked at the time of the house, so people in costume working, cooking etc.”
Engagement of Moms
Moms: A Tough Audience

- Generally most negative audience segment
  - 30 – 42% feel needs are met

- Less likely to be members
  - More likely to join for budgetary reasons

- Focused on the needs of their children
  - “We,” “my family,” and “my kids” . . . not “I” or “me”
  - Mom’s needs, dad’s needs not considered
Engagement of Moms

- Not as curious as other audience segments
  - 30% are curious about science vs. 39% topline (ASTC)
  - 41% are curious about history vs. 46% topline (OHM)
  - 41% curious, love to learn vs. 53% topline (CT)

- Only *sometimes* thinks the museum makes her feel more informed

- *Wants* the museum to inspire her to explore and learn more
Moms – Cycling In, Cycling Out

- Significantly less likely to be Museum Advocates
  - Estimated 6% – 42% of moms

- Bottom line:
  - Mom is there *for* the kids
  - Mom is not engaged herself
  - Need to engage her interests, her intellect for long-term sustainability
    - Instead, cycling in, cycling out
  - More Museum Advocates are needed
Museum Advocates
Museum Advocates

General public

Casual Visitor

Core Visitor

Museum Advocate

General public

Casual Visitor

Core Visitor

Museum Advocate
Museum Advocates

Density of Museum Advocates increases with age . . .

. . . is it life stage, or is it a generational shift?

Are younger adults less likely to be Museum Advocates?
Museum Advocate Moms

- Museum Advocate moms are:
  - Generally more community-oriented
  - Omnivorous leisure-time habits
  - Happier, more satisfied with museum
  - More philanthropic
  - More likely to grow the next generation of Museum Advocates
Museum Advocate Moms - ASTC

- Moms in 30s, 40s: curious, think adults are engaged
  - Only 7% of moms
  - 51% believe serve needs well vs. 32% all moms
  - Generally more positive
    - 2x more likely to say science presented well
    - 2x more likely to say always something new to see or do
  - More philanthropic in giving
    - 2x more likely to support science organizations
Museum Advocate Moms - ASTC

- 3x as likely to believe serve teens and adults well
- 2x as likely to believe staff cares and museum brings community together
- 2x as likely to feel museum makes them better informed
- Even more likely to believe very trustworthy

Photo: Questacon
Museum Advocate Moms - ASTC

- Enjoys museums far more
  - 74% of science center visitors enjoy science centers vs. 59% topline
  - 78% of natural history visitors enjoy natural history vs. 69% topline
  - Significantly more likely to enjoy:
    - History-based museums
    - Art museums
    - Botanical gardens and arboretums
    - Nature centers
Museum Advocate Moms - CT

- 46% of moms

Museum Advocate moms are:
- Nearly 4x more likely to love immersing self in history/art
- 2x more likely to be “curious”
- Over 3x more likely to support cultural organizations
- 2x more likely to support community organizations
- Generally happier with museum
Museum Advocate Moms - CT

- Museum Advocate moms visit a wider variety of museums with their families
  - Seeking omnivorous museum experiences
  - Narrative-based *and* hands-on
Core Visitor Moms: Second Class Visitors

- Mom makes herself a second-class visitor . . .
  . . . and she doesn’t have to be

- Visits *for* the kids

- The fear: Her lack of engagement/interest rubs off on kids

- Need to engage *her* interests, intellect too
Museum Advocates vs. Core Visitors

Museum Advocates:

- Art, Botanical Gardens
- Children’s
- Science
- History
- Lifelong Museum Habit

Core Visitors:

- Early childhood: Children’s, Zoos
- Elementary years: Science Centers, Zoos
- Casual visitation until parenthood, repeat as grandparent
Museum Advocate Moms

- Bottom line: more Museum Advocate moms are needed
  - How do you get them?
    - Narrative-based experiences to go with hands-on
      - “Telling with a good story is key”
      - Immersion in the story, the past
    - Seeking inspiration
    - Collaborating with other museums critical to success of all museums

Photo: Strawberry Banke
Creating More Museum Advocates

- Children’s museums, science centers:
  - Attract more Core Visitor moms
  - Lower perceived barriers of entry
  - Engagement is via children, not as sustainable

- History-based, art museums:
  - Attracting fewer moms, but higher density of Museum Advocates
  - Higher perceived barriers of entry for Core Visitors
  - Engagement is with adults as well, more sustainable
Creating More Museum Advocates

- Hands-on museums and narrative-based museums have *complimentary* audiences

- By working together, these museums can create more Museum Advocates by:
  - Building family audiences at history, art museums
  - Building adult audiences at hands-on museums
  - Increasing emotional connections at hands-on museums
  - Increasing pipeline of Museum Advocates for all museum types
  - Creating broader, more sustainable audiences
Concluding Thoughts
Expanding the Circles

Core visitors

Museum Advocates
How to do this?

- Partner with complementary museums
- Deeper involvement with community
- Build on trustworthiness, reputation, authenticity via narrative, emotional hooks
- Layering content for children and adults
Audiences Today

Audiences are changing

Is change a challenge or an opportunity?
Museums Have It

- Places of:
  - Thoughtfulness: “A great place to learn and have fun”
  - Wonder: “I have experiences I don't expect”
  - Inspiration: “They expand my thinking”
  - Connection: “Priceless memory shared between family/friends”
  - Solace: “I forget the real world for a while”
  - Community: “They are the foundations of modern life, society”
Questions or copies of presentation slides?

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