Insight: a survey of the London museums market

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Insight: a survey of the London museum market

This report is one of a series of publications designed to share research findings, guidance and best practice produced by the London Museums Hub.

The London Museums Hub is a partnership of four regional museums funded by the Renaissance in the Regions programme. The members of the London Museums Hub are:

- Museum of London (incl. Museum of London Docklands)
- Horniman Museum
- Geffrye Museum
- London Transport Museum

Our aim is to support and develop accessible, innovative and sustainable museum services for London.

Foreword

Museums must actively extend their reach to those who either are not satisfied or who do not currently visit them

I am delighted to present the London museums sector with this new publication, 'Insight: a survey of the London museums market'. This report, commissioned by the London Museums Hub, represents unique research that has mapped and described the existing and potential markets for museums and galleries in London.

To achieve a more vibrant engagement with the public, museums need greater ambition, agility and clarity about reaching their various audiences. As places of learning and enjoyment, museums continually refresh and renew their engagement with existing audiences and must actively extend their reach to those who either are not satisfied or who do not currently visit or use museums and their resources at all. This report therefore provides an essential tool in reaching these groups.

I hope that the market insight contained within this publication and on the more detailed reports available on the MLA website (www.mla.gov.uk/renaissancelondon) will assist museums in planning their audience development, programming, target setting, fundraising and marketing strategies with confidence.

Professor Jack Lohman
CHAIR OF THE RENAISSANCE LONDON BOARD

Introduction

We want to raise awareness of the data and encourage London's museums to use it to plan their programming and marketing

This report is based on a telephone survey of London households commissioned by the London Museums Hub in 2008. Although the initial motivation was to support the Hub museums' understanding of their place in the London museum market, it quickly became apparent that this research could be of great interest to the wider museum sector.

This document cannot do justice to the rich data we collected. Instead it aims to give a brief introduction to the survey and an overview of how Londoners view and use museums. We want to raise awareness of the data and encourage London's museums to use it to plan their programming and marketing. To assist in this process, we have commissioned MLA London to analyse the data and produce a set of sub-regional reports, giving details of the findings for residents of particular boroughs. These reports, together with a general summary of the survey results can be downloaded free from www.mla.gov.uk/renaissancelondon (see page 18 for details).

We hope that you find this report useful. If you would like to know more about the work of the London Museums Hub and the Renaissance in the Regions programme in London, please contact:

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We asked "Would you consider going to a museum, art gallery or photographic exhibition?"

What we did

At the time of the research, the catchment area covered a total population of 6,152,100 adults. We purchased randomly generated phone numbers for the catchment area.

A qualifier question was asked of the people we interviewed to establish the size of the market in the catchment area. We asked: 'Would you consider going to a museum, art gallery, or art, craft or photography exhibition?'

If the respondent answered 'yes' at this point in the survey they continued with the interview and were classified as being in the potential market. 86% of people we spoke to were 'in the market' = 5,308,420 people in the catchment area.

We conducted telephone interviews with adults in the catchment area, and 3,596 people completed a detailed survey about their attendances, attitudes, motivations etc. To help us ensure the 3,596 sample was representative of the population, we also collected profile data from the respondents who were not in the market, that is they were not interested in attending museums, art galleries or exhibitions.

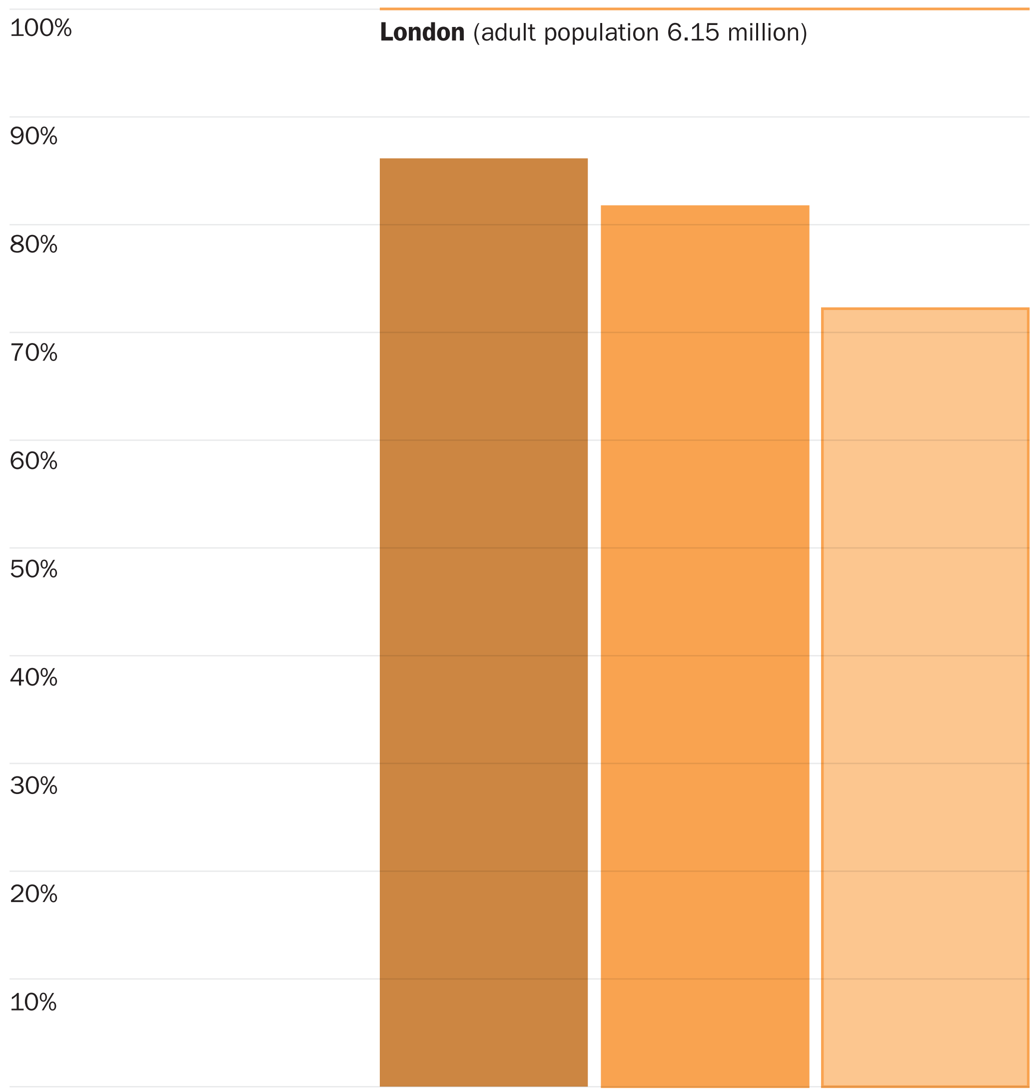
These interviews were representative of the population at the point of the 2001 census.

Audiences

Understanding our existing and potential audiences is crucial to this role, both to enable the Hub museums to reach and engage with new audiences and to support other museums in developing and promoting their services. For this reason we commissioned Morris Hargreaves McIntyre to conduct an unprecedented, large-scale household telephone survey. The aims of the survey (which were cross-analysed against demographic and psychographic profile data) were to understand the following:

- Present levels of penetration into the market – the proportion of Londoners open to visiting museums and galleries who presently attend the London Hub venues and national museums
- The levels of cross-over between museums – how much of the market is shared and how much particular to each museum
- Degrees of lapsing – how many people have attended in the past but have not been recently
- Propensity to attend – the numbers of people who are open to attending but who have not attended any of the venues in recent years
- Awareness – the proportions of existing, lapsed and potential attenders who are aware of the Hub venues
- Areas of interest – relative popularity of different topics and subject matters
- Attendance patterns at other London museums and galleries – where else they visit and at what frequency and under what circumstances
- Motivations to attend – what drives their attendance at museums and galleries?
- Obstacles to attendance – what stops them attending?
- Information sources – what do people rely upon for getting information on cultural and leisure activities?

Londoners and museum visiting



This graph represents the current and total museum market in London.

86%
(5.31 million)
Total market: would consider visiting a museum and/or gallery

81%
(4.96 million)
Current market: visited a museum and/or gallery anywhere in past 5 years

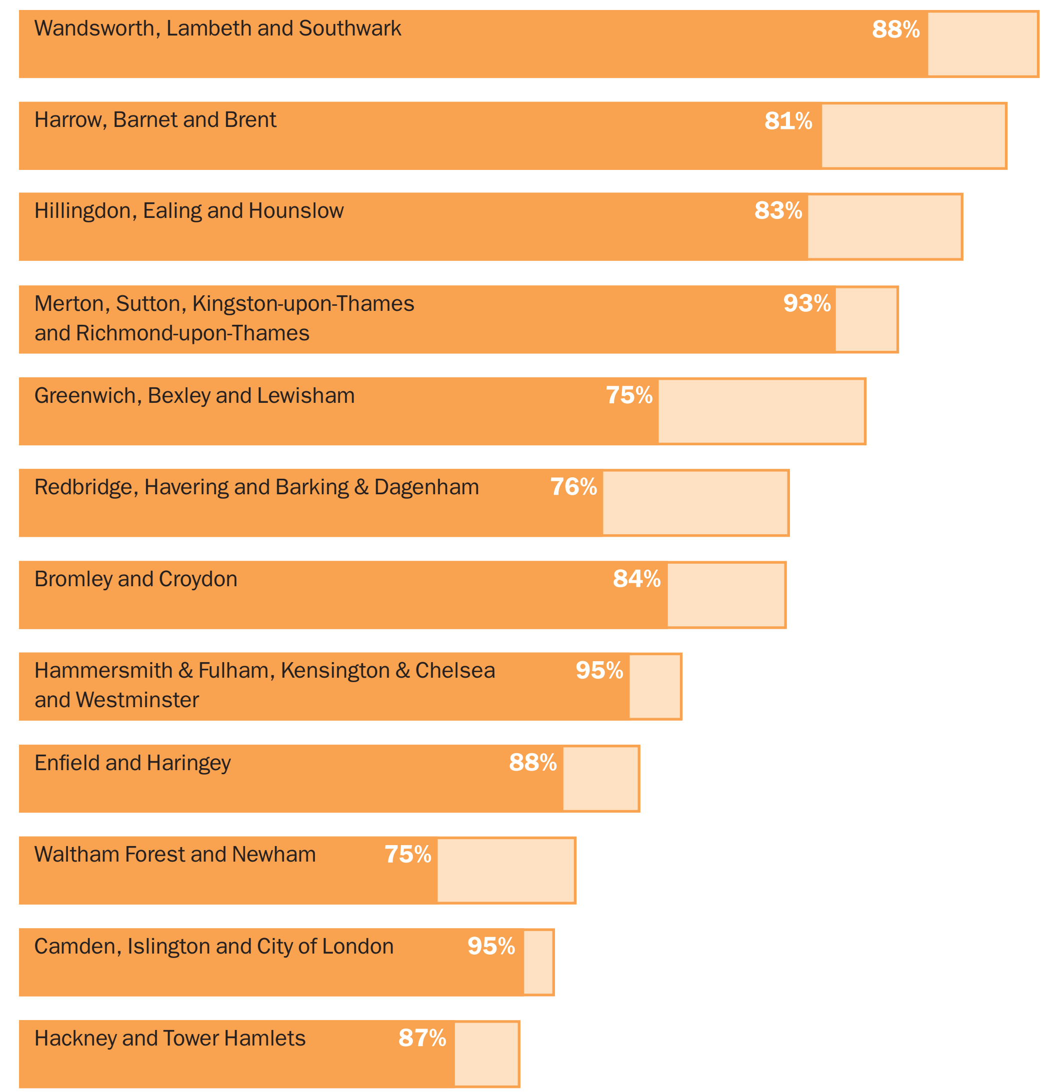
72%
(4.45 million)
Current London market: visited a museum and/or gallery in London in past 5 years

We can see which parts of London are 'cold spots'

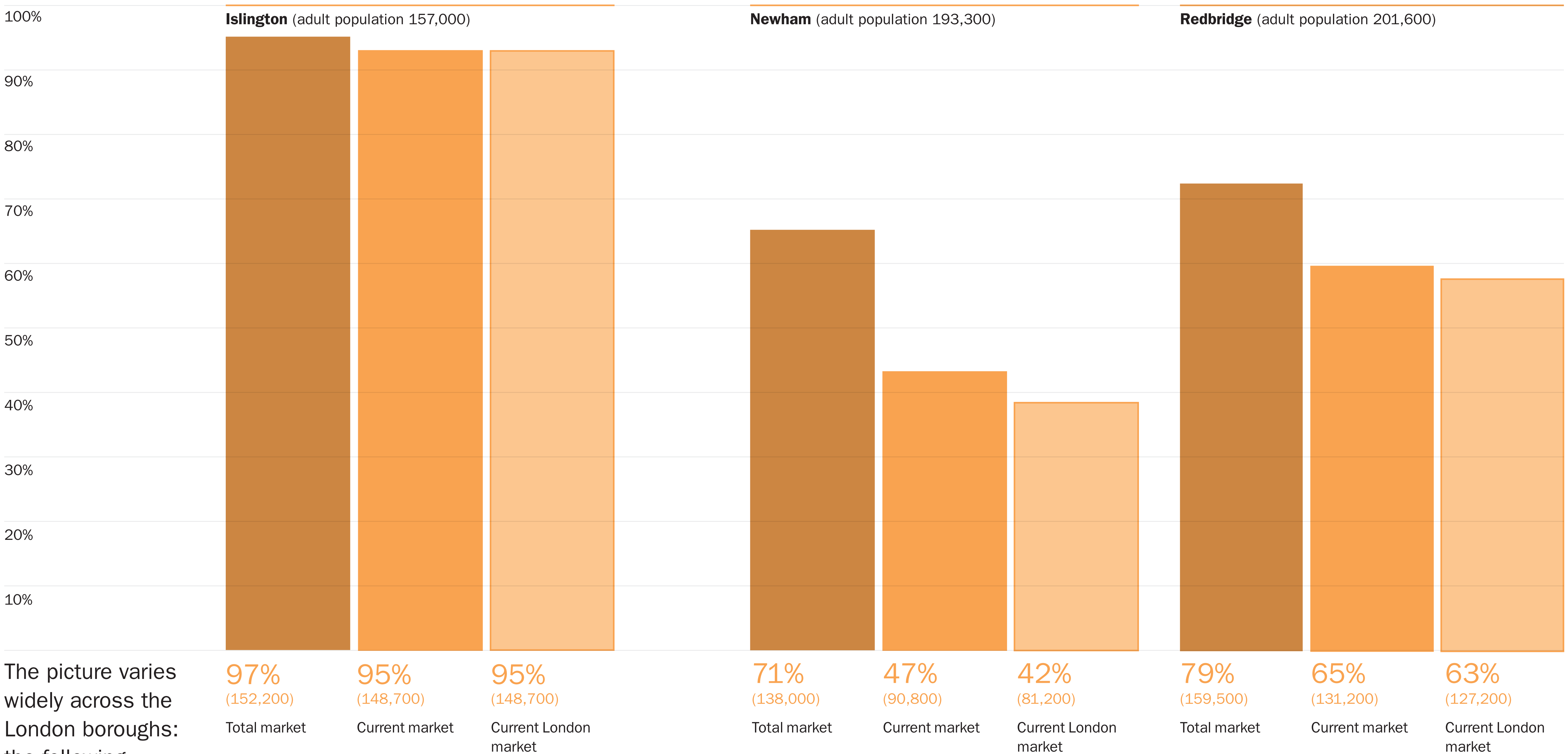
Museums and galleries market by area

The graph below shows the percentage of residents in each area who would consider visiting a museum or gallery. This allows us to see which parts of London are 'cold spots' for interest in museum and gallery visiting.

The length of the bars indicates the total size of the population: the darker shaded area represents the size of the market for visiting museums and/or galleries.



Levels of penetration



The picture varies widely across the London boroughs: the following graphs look at three boroughs in more detail.

This shows high levels of penetration in Islington: this market is almost saturated, with the vast majority of Islington residents open to visiting museums/galleries, and the vast majority having visited a museum and/or gallery in London in the past five years. For this borough, the challenge is to turn occasional museum visitors into frequent visitors.

By contrast, this graph shows that there is plenty of potential for further market penetration and further market development in Newham: just 71% of residents would consider visiting, and less than half have visited a museum or gallery in the past five years.

Similarly, this graph shows that there is potential for further market penetration and further market development in Redbridge.

The Hub has targeted investment to attract new audiences to experience museums and historic sites

What we can do with this information

The survey results show relatively low responses to the question ‘would you consider going to a museum, art gallery or art, craft or photography exhibition?’ for residents in some Thames Gateway boroughs. These findings align with other research sources which suggest that residents from some boroughs tend to have low levels of cultural participation generally.

The Hub has therefore targeted investment in outreach and family friendly programmes in Redbridge with a view to attracting new audiences to experience museums and historic sites. This will involve funding Redbridge Museum Service and Valentines Mansion to:

- Develop and deliver a weekday Early Years Club for under 5s at Redbridge Museum and Valentines Mansion. In particular, those not currently using these two venues will be targeted
- Develop and deliver a range of high-quality programmes targeted at families with children in Redbridge.

These programmes will be developed and delivered in partnership with a range of local partners including Sure Start centres and local schools.

Redbridge Museum

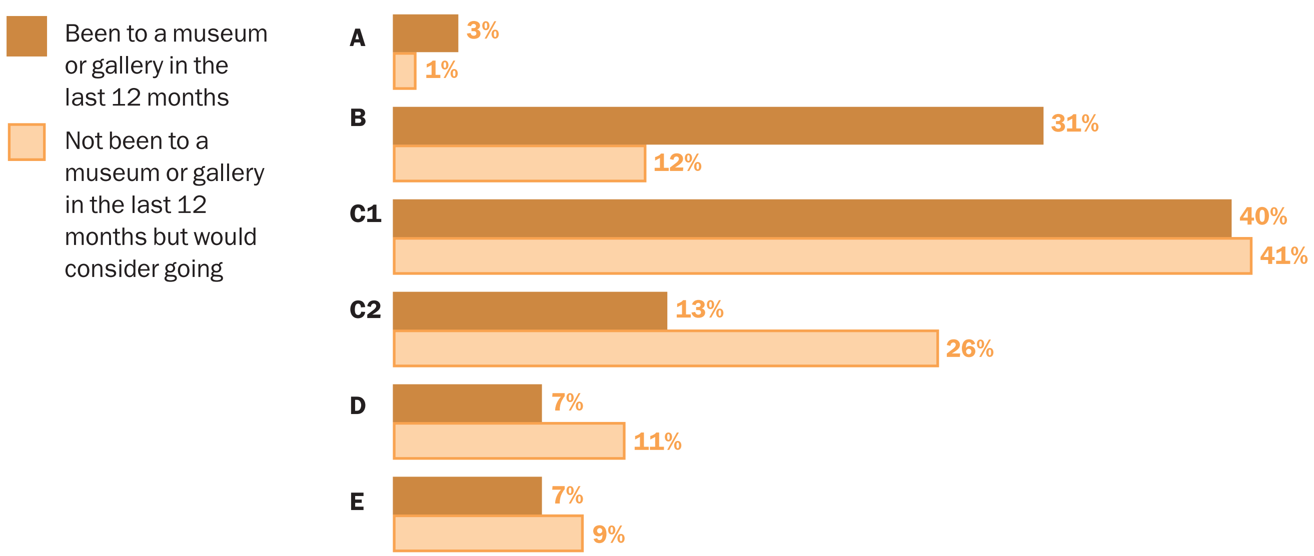
Redbridge Museum

Who else might come?

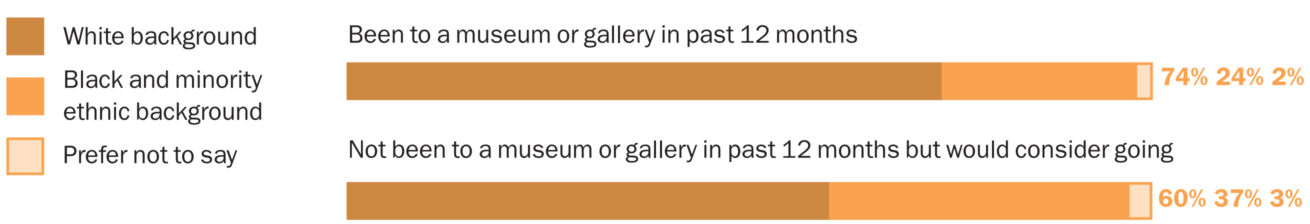
There is scope to reach a more representative audience

Londoners who have visited a museum or gallery in the past 12 months are more likely to be from White ethnic backgrounds and from higher social grades than the general population of London. However, the demographic profile of those who are in the market but have not been in the past 12 months is more diverse. This suggests that there is scope to reach a more representative audience by reaching out to those who already have a propensity to visit but have not done so recently.

Social grade of visitors in past 12 months and potential visitors



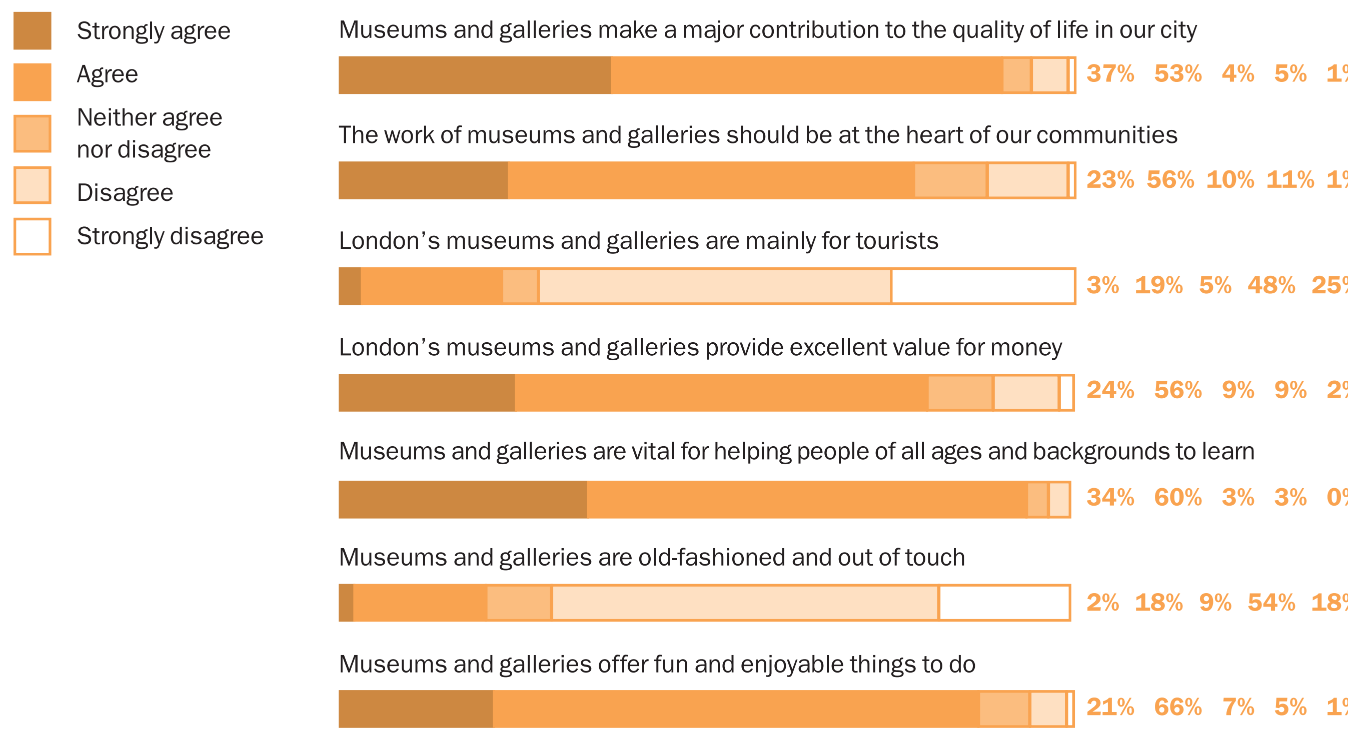
Ethnicity of visitors in past 12 months and potential visitors



How Londoners feel about museums

We asked people in the market for visiting museums and galleries about their attitudes to these services. The following graphics show the responses of all respondents in the museum and gallery market.

Attitudes



What we can do with this information

When we combine this data with record visitor levels (over 1 million visits a year to the Hub museums alone), high satisfaction ratings amongst visitors and qualitative feedback from learning and community engagement projects, we have a series of very powerful advocacy messages on the centrality of museums in peoples' lives. The Hub will be working closely with MLA and Greater London Authority to promote these messages with local authorities and other key funders and stakeholders.

Why people visit

We have classified different motivations for visiting and developed statements to measure them

We asked people in the museum and art gallery market to tell us what motivates them to visit.

When we use the term 'motivation' we are not referring to the prompts for a visit (eg. seeing a poster). Instead, we mean the fundamental benefits that a visitor hopes to get from visiting. Based on extensive previous research with audiences, we have classified different motivations for visiting and developed statements to measure them. The left hand column shows how we have grouped these statements into four key drivers.

The table below lists the responses, showing the range of motivations and the primary motivation for visiting a museum or an art gallery amongst people in the market.

Drivers	Motivations	All	Main
Social	I'm drawn to interesting buildings	28%	2%
	To go to a major attraction	37%	4%
	An enjoyable way to pass the time	67%	18%
	Nice place to spend time with friends/family	43%	6%
	To visit the shop/café	13%	0%
Intellectual	Encourage children's interest in the world	26%	7%
	Improve my own knowledge	64%	19%
	Personal interest in the subject	61%	22%
	Academic/professional interest in the subject	17%	3%
Emotional	Get a better understanding of people/cultures	42%	3%
	Reminded what life was like when I was younger	24%	1%
	Experience what the past was like	41%	4%
	A strong sense of personal connection or identity	15%	0%
	To have an emotionally moving experience	15%	0%
	See fascinating, awe inspiring things	36%	3%
	See beautiful things in an attractive setting	33%	3%
Spiritual	Stimulate my own creativity	24%	3%
	For peaceful, quiet contemplation	16%	1%

Visitors aged 16–24 tend to be more intellectually-motivated than other age groups

The results show that intellectual and social motivations are the most significant drivers for visits.

Family visitors are driven by children's needs
People who would consider taking children to museums and galleries are more likely to be intellectually motivated than people visiting without children. Many of these visitors have a strong desire to encourage children's interest in the world around them, or to stay one step ahead of their children by improving their own knowledge on a topic.

Encouraging family visits may also help to reach more diverse audiences
Overall, there are few significant differences in motivation according to ethnic background.

Those from black and minority ethnic backgrounds are twice as likely to name 'a nice place to spend time with friends and family' as the main motivation for visiting. Visitors from black and minority ethnic backgrounds are also more likely to visit with children, and so are more likely to cite self-improvement as their main motivation (as are all family visitors).

Motivations also vary by life stage
People aged 16–24 tend to be more intellectually-motivated than other age groups: they are more likely to be motivated by learning, often connected to school, college or university.

Those aged 25-44 are more likely to be focussed on the needs of children when visiting a museum or gallery.

People aged 45–64 are more likely to name a personal interest in the subject as the main motivation for visiting. These visitors are also more likely to want to engage emotionally with collections – through time travel, nostalgia and appreciating aesthetic beauty.

Those aged 65 and over are more likely to see visiting museums and galleries as simply a pleasant pastime: 23% in this age group name 'an enjoyable way to pass time' as their main motivation.

Geffrye Museum

What we can do with this information

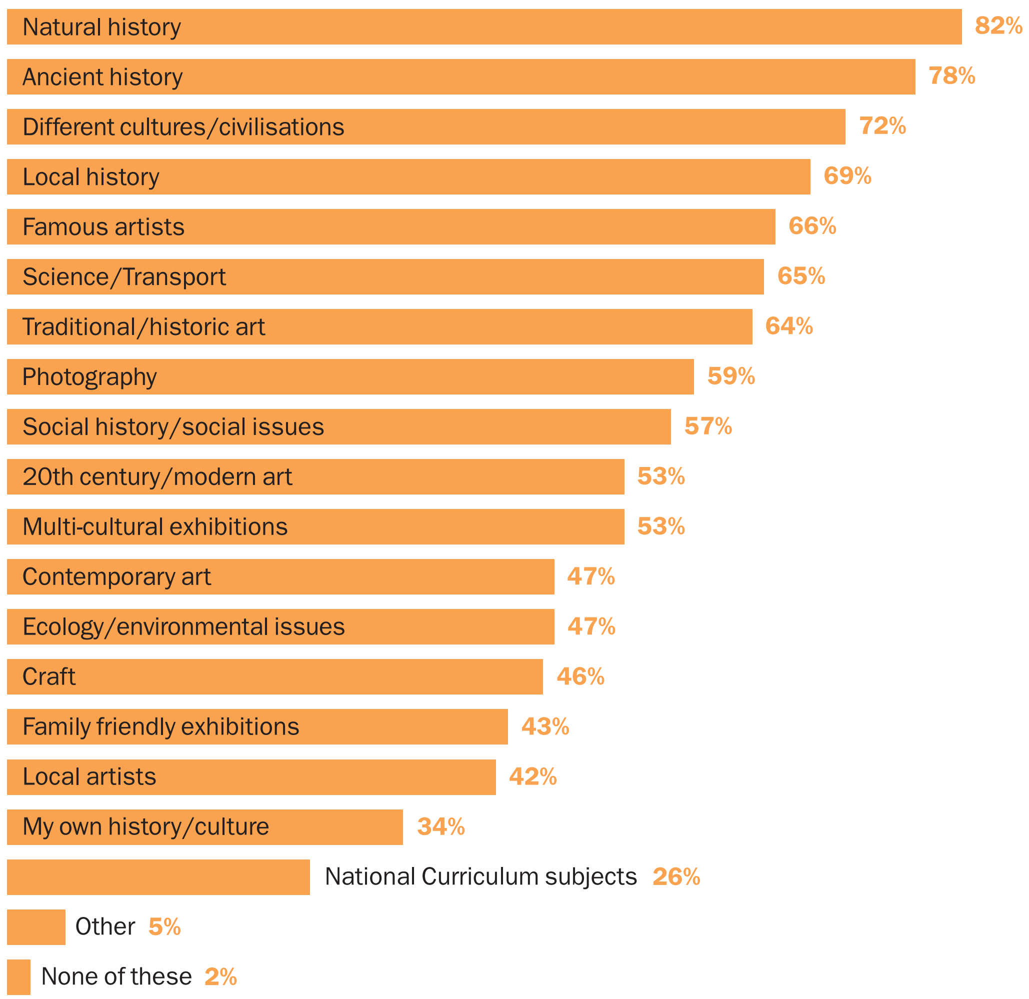
In line with the findings of the survey that adults bringing children are at least as interested in their own personal learning as in supporting their child's learning through a museum visit, the Hub is focussing on offering 'family learning opportunities' where adults and children can learn together.

At the Geffrye Museum, weekend family activities include craft sessions, a quiz desk, trails, 'feelie boxes' and under fives sessions. All the elements of these activities are designed to deliver opportunities for family members of all ages to learn together, rather than just provide programmes for children with adults as passive on-lookers.

Levels of interest in subject areas

We also asked those in the market what topics interested them. The results are shown in the chart below.

Topics of interest



Historical topics are by far the most popular

Historical topics are by far the most popular of the subjects suggested, with natural history the most popular – 82% say this is a topic that they would be interested in.

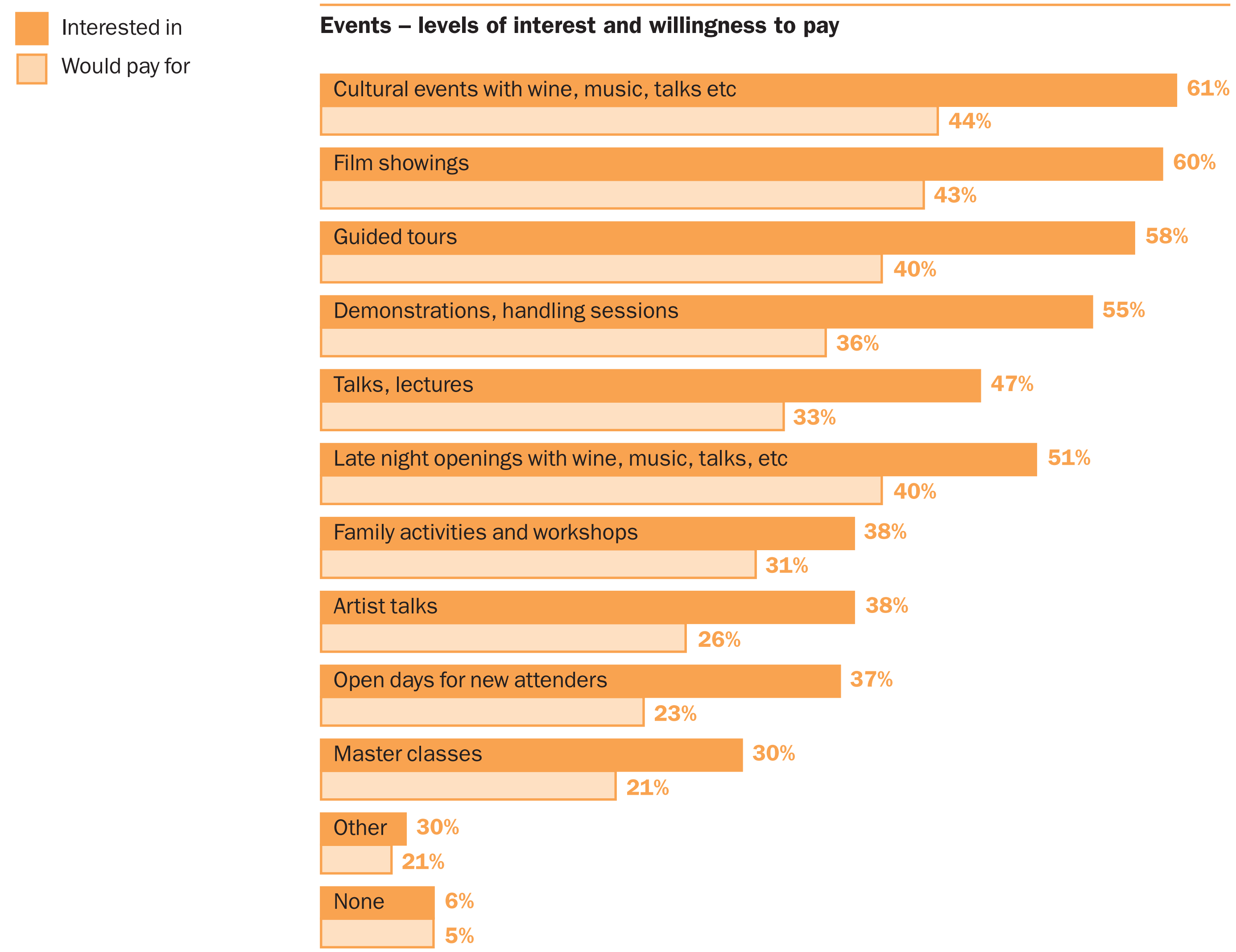
Ancient history is the next most popular, with 78% interested, followed by different cultures/civilisations (72%) and local history (69%). Also popular as topics are famous artists, science/transport and traditional or historic art.

Less popular was the subject of 'my own history or culture' which only 34% said they would be interested in. 35% of those who would potentially take children to a museum or gallery said they would be interested in National Curriculum subjects.

What events are people interested in attending?

The chart below shows the sorts of events that people in the market for museums and galleries would be interested in going to. The chart also shows which events the market would be willing to pay for.

Events – levels of interest and willingness to pay



What we can do with this information

The London Museums Hub will use this information to plan events programmes at the Hub museums and to plan support packages for the wider museums sector, such as the grants it recently offered to support participation in the Mayor's Story of London festival.

How you can access the data

A summary of the survey results is available as a downloadable PDF

A summary of the survey results is available as a downloadable PDF at www.mla.gov.uk/renaissancelondon. As mentioned earlier we have commissioned more detailed sub-regional reports which analyse data relating to residents in specific borough groupings.

The reports are:

North
Barnet, Enfield, Haringey, Waltham Forest

Inner East
Greenwich, Hackney, Lewisham, Newham, Tower Hamlets

Outer East
Barking & Dagenham, Bexley, Havering, Redbridge

South East
Hounslow, Kingston, Merton, Richmond, Wandsworth

West
Brent, Ealing, Hammersmith & Fulham, Harrow, Hillingdon

Central
Camden, City of London, Islington, Kensington & Chelsea, Lambeth, Southwark, Westminster

These sub-regional reports are also available at www.mla.gov.uk/renaissancelondon

National museums

Our survey also asked questions about levels of awareness and usage of national museums in London. The London Museums Hub is happy to make the data freely available to museums mentioned in the survey. This data is compiled using SNAP software and museums wishing to analyse the data for their museum will need to have a SNAP licence and expertise in using this software. Alternatively, specific reports for those museums mentioned in the survey can be commissioned from Morris Hargreaves McIntyre. Please contact the London Museums Hub for further details.

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