

# **Non-Visitor Research: An Important Addition to the Unknown**

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Every good innkeeper knows his or her regular patrons. Every successful shop owner knows his usual customers and their special needs. Both would be bad entrepreneurs if they did not take special care of their regulars. Museums have regulars as well, who should be pampered, too. The conferences of the Visitor Studies Association (VSA) are devoted to this permanent communication process. We learn a lot about our visitors and ways to become more visitor-oriented, though these discussions focus only on actual visitors.

A good businessman or businesswoman does not concentrate on his or hers regular customers alone. He or she works hard to persuade the chance or occasional customer that it is worthwhile to return. He or she tries to convert patrons who come irregularly to become regular customers. And foremost, he or she thinks about ways to activate people who have never entered the shop. In my considered view, we have to include non-visitor research in our public relations strategy. After all, every non-visitor is a potential visitor. Without non-visitor research we base strategic programming and marketing decisions on unrealistic assumptions, especially because museum experts often tend to be highly educated specialists, who are not able to communicate successfully with "everyday persons".

Given the fact that in Germany, more than 60 percent of the population are not regular visitors to museums or other cultural institutions, non-visitor research is an important factor for future strategies. We need to find out why the majority of the population does not frequent our museums. What are their main sources of information? Where are their fields of interest? What do they know about museums? Which beliefs do they hold about exhibitions and museums? What are the best ways to activate non-visitors? This is only a small sample of the questions which will enable us to enhance our knowledge about people who normally abstain from visiting museums.

The Haus der Geschichte, the museum of contemporary history of the Federal Republic of Germany, opened its gates for the first time in June 1994. Since then, it has attracted more than 1.5 million visitors to its permanent exhibition alone, not counting 600,000 visitors to changing exhibitions. From the outset we put heavy emphasis on visitor-orientation and evaluation. I dare say, no museum in Germany has ever spent so much time and effort on visitor research before its opening.

After opening in June 1994, our evaluation work, which benefitted immensely from close cooperation with Ross Loomis of Colorado State University, entered a new phase. In three waves we asked a sample of over 1,600 visitors numerous questions based on visitor survey research. If we had decided to manipulate these results, we would not have dared to dream up such outstanding results. Last year in Saint Paul, Ross Loomis and I presented a detailed account of our evaluation results. In short, 94 percent of our visitors rate the permanent exhibition as "outstanding" or "good". Nearly 98 percent of our visitors would recommend the Haus der Geschichte to their family and friends. Only three percent terminated their trip through the museum after one hour, 80 percent stayed up to three hours, and an astonishing 17 percent spent more than three hours in our permanent exhibition.

Parallel to this in-house research on visitors, we decided to commission an independent study of non-visitors by Volker Kirchberg and his research institute. This nationwide study was based on an initial sample of 25,000 representatively-selected German households. We focused on two sets of questions: first, general familiarity of the public with the Haus der Geschichte, and second, intention to visit our museum. Kirchberg elaborated on some of these findings in his paper presented at the international conference on "Museums and their Visitors: Challenges for the Future," held at the Haus der Geschichte at the end of November 1996. The findings included:

1. We found that 27.8 percent of sampled German households were familiar with the Haus der Geschichte. Additionally, we learned that there was a direct link between the level of education and knowledge of our museum. Among university graduates, more than 53 percent knew about the Haus der Geschichte; in contrast, only 20 percent of graduates from the lowest level of primary schooling had ever heard about our museum.

2. We then asked the 27.8 percent who were familiar with the Haus der Geschichte about their intention to visit our museum in the future. We distinguished between four categories ranging from "yes, within a year" to simply "no": 24.6 percent said they were likely to visit the Haus der Geschichte. The great majority, 50.3 percent, did not want to specify their intentions. A quarter of those questioned, 25.1 percent, responded negatively. The most important factor which determined their responses was place of residence. Not surprisingly, people living close to the museum -- in a 50 mile radius of Bonn -- were much more inclined to visit. Conversely, those living further away were less inclined to visit. Significantly, inhabitants of the former GDR (East Germany) were just as motivated to visit the Haus der Geschichte as were residents in western German counties (who lived within a comparable distance from Bonn). These findings were encouraging and important for the ongoing process of inner-unification of Germany.

The results of this survey answered some questions, but even more, it sparked our interest for further and more sophisticated research and analysis. Thus, we commissioned a follow-up study in 1995, composed of 1,200 representatively selected persons. The second questionnaire was much more detailed, allowing for additional cross-referencing. Because we wanted to zero in on our audience, we again looked at familiarity and inclination to visit, but we focused primarily on what sociologists call "defining factors".

First, we wanted to know how Germans gather information about history, still a much neglected field of research. We had come across only one comparable survey, by the Allensbach Institute, which is the Gallup Poll of Germany. In 1988, the survey asked how people gathered information about history. Results suggested eleven categories from "reading books on history" to "watching TV" to "talking to contemporaries". Naturally, results also included "going to museums". "Watching TV" finished first and "sightseeing of castles and churches" finished second. "Going to museums" ranked a disappointing 9th place, third to last. Obviously, history museums have a lot of catching up to do.

For reasons of comparability, we used the same categories for our own survey in 1995. Again, "watching TV" finished first and "sightseeing of castles and churches," second. With the third to last position of the

1988 survey in mind, we were both pleased and surprised to find that "going to museums" finished in our 1995 survey in a strong third place. We have to take into account, however, that the context of the whole questionnaire possibly induced people to respond more favorably toward history museums. Also, perhaps the overall positive image of the Haus der Geschichte affected this answer. Nevertheless, the results seem to suggest that the general perception and acceptance of history museums may have improved over the years. Additionally, we found that there is a great interest in historical themes. Only 6.3 percent maintained that they do not bother with history.

These encouraging findings confirmed our assumption that history and historical museums are important institutions for the public, and provided further background information for our questions about familiarity and intention to visit. Findings from this follow-up survey included:

1. Similar to our earlier study, education and income were again defining factors regarding familiarity with the Haus der Geschichte. Visits to other historical museums before the age of 14 were, however, not a defining factor. On one hand, this contradicted the long-held belief that a "culture of museum-going" and interest in museums had to be instilled during the formative years of a person's life. Our survey showed that children from a family of "museum-goers" knew about the Haus der Geschichte just as much as children from comparable families without a museum-going tradition. On the other hand, these findings opened up possibilities for recruiting new, potential visitors, because museums can now realistically be encouraged to target persons who were not raised in a culture-oriented or museum-oriented environment.
2. Age was another defining factor. The older the respondents, the likelier they were to be familiar with the Haus der Geschichte. In the segment over 60 years of age, 32 percent had heard about our museum, compared to 28 percent of the general population and only 24 percent of people under 30 years of age. These findings did not correspond directly to our actual demographic visitor profile. Among our visitors, people over 60 years of age were under-represented when compared to the national average.

Members of the younger generation, up to 30 years of age, were over-represented. The demographic distribution for visitors between the ages of 30 and 60 years of age mirrored German society exactly. Clearly, a higher level of familiarity with the Haus der Geschichte among older people alone had not resulted in more visits by this age group.

3. Geography was also an important factor in determining familiarity with the Haus der Geschichte. As mentioned earlier, proximity to Bonn was very telling. But we found that distance alone was not as significant as we had thought. A more significant factor was the size of the residential town. Knowledge of the Haus der Geschichte was higher in bigger cities than in rural areas.
4. We were not able to link "inclination to visit" with as many "defining factors" as we could with familiarity with the museum. For example, income was not a defining factor. Similarly, there was no correlation between duration of schooling specifically in the field of history and intention to visit the Haus der Geschichte. But higher general education did result in much greater propensity to visit. Thus, education was the defining factor in this category.
5. Demographic analyses did not explain any inclination or disinclination to visit the Haus der Geschichte. But we recognized one disturbing result -- families with small children were significantly less motivated to visit our museum than any other demographic category.
6. Inclination to visit our museum was directly linked to geographic factors. As in our earlier study, we discovered a remarkable propensity for visiting the Haus der Geschichte by people who lived within a 50 mile radius. However, beyond this radius, familiarity alone did not motivate more people to actually visit the museum (either residents in big cities outside the 50-mile radius or inhabitants of rural areas).

A new aspect of this follow-up survey, which also included advanced research in life-style models, focused on questions of individual motivation and barriers to museum visits in general. How did we arrive at the various categories for motivation and barriers? The categories were compiled by Kirchberg from intensive study of the existing literature and two sessions of group discussions. We also found that these findings were applicable to the Haus der Geschichte.

Kirchberg differentiated between extrinsic and intrinsic motives and barriers. The latter refers to reasons which are directly linked to the institution, such as, "I like museums because of their architecture" and "I like museums because of the special atmosphere" to "I like museums because I am able to see famous and spectacular objects there". Extrinsic motives are rooted in the disposition of the beholder, for example "I like museums because they are fun places and offer good entertainment" or "Museums are institutions where I can relax and be together with friends and family". As intrinsic barriers he selected for example "Museums are too expensive to visit" or "Museums offer boring exhibitions and do not respect their visitors". Extrinsic barriers were represented by statements like "I am not able to understand most of the things displayed in museums" or "I have better things to do in my leisure time than to visit museums". Selected findings from this part of the survey included:

1. The ten motives averaged 3.38 on a five-point scale of importance with five being the highest score ("most important"). The thirteen barriers scored a median of 2.05 on the same scale. Clearly, the various motives to visit museums were much more important than barriers.
2. A desire to strengthen general education, with 4.37, and experiencing spectacular presentations, with 3.82, were the most important motives. Least important motives were entertainment with 2.78, and -- dead last -- museums as places for social outings with family and friends. The stereotype of museums as "temples of muses" was still very alive in the imagination of a majority of Germans (Figure 1).
3. The most impressive barrier for museum visits was the entrance fee. It scored 2.56. The second most important factor was a lack

of information about museums and their work, with 2.25. Unfriendliness to families and general unintelligibility were the two least important barriers (Figure 2).

We added a question about the general perception of the Haus der Geschichte to our survey. The image of our museum among the German public will be very important for future marketing strategies and any attempt to motivate new visitors. We asked the participants of the survey to rate, on a five-point scale, the public image of the Haus der Geschichte in ten categories which ranged from “enlightening and informative” to “impressive and stately”. Among the results were the following:

1. An astonishing 25.9 percent regarded our museum as “entertaining and amusing”. In light of the current public image of museums, this result is very encouraging.
2. Only 9.5 percent thought of our museum as “provincial and small-town”. In contrast, 65.7 percent viewed the Haus der Geschichte as “impressive and stately”.
3. Only 19.9 percent considered our museum “West-German and west-oriented”. More than half of the non-visitors, 58 percent, considered it to be “all-German and belonging together”. The fact that potential visitors did not regard the Haus der Geschichte solely as an off-spring of the Federal Republic of Germany was important for promoting Germany’s inner unification, especially for the inhabitants of the former GDR.
4. Three quarters, 75.5 percent, characterized the Haus der Geschichte as “enlightening and informative”. Only 10.0 percent rated it “elitist and exclusionary”.

In light of our goal to be a museum for “everyday persons”, these findings are quite positive. However, they also point out areas of improvement. How does this enormous wealth of survey material influence our future decisions? What are the basic lessons to be learned? Modern, visitor-oriented marketing for museums concentrates on four categories: product policy, contraction factors, communication, and distribution.

First, in the museum field product policy can be defined as the selection of attractive exhibition themes and design. In this regard, the survey showed that "increasing all-round education" and "experiencing spectacular displays" are the two most important motives for visiting museums.

Second, we must bear in mind such contraction or barrier factors for museums' as typical entrance fees and opening hours. For the Haus der Geschichte our marketing efforts must emphasize that entrance is free of charge and that the museum is open six days a week for 10 hours a day. The federal law which brought our foundation into being explicitly prohibits the collection of an entrance fee. In a country where we do not have to pay for schooling or even university, a decision to levy an entrance fee would be met with understandable annoyance. Most Germans rightfully regard the Haus der Geschichte as "their" institution, a museum which presents the history of every citizen. In my opinion, the tax-payers have already financed our museum; each visit amounts to their return on investment. We need to underline this special feature because high entrance fees were regarded as the most significant barrier to visiting museums.

Third, our public relations department has to intensify its work to emphasize the special features of our museum. Furthermore, we have to highlight special events and expand our offerings in the field of lectures and symposia which are directed towards all-round education.

Finally, the survey results provided us with guidelines for our distribution policy, namely geographic catchment or focus areas. As a first step, we will concentrate our efforts in a 50 mile radius. Because people within this area already have both a high level of familiarity with the Haus der Geschichte, and a strong inclination to visit our museum, marketing efforts will be relatively low cost and high in return. Each Deutschmark spent in an area where propensity to visit us rates below average will generate fewer potential visitors than an investment in regions with greater inclination. Our survey can keep us from investing in the wrong places.

As a first step in applying our findings to a marketing strategy we selected Mannheim, a large city some 150 miles from Bonn in which familiarity with our museum was within the nationwide median and intention to visit the Haus der Geschichte was considerably above the national average. We have started an extensive campaign with banners and posters of our current changing exhibition "Finally Holidays: Germans



Travel" in the entire city. We expect the results to be compiled by spring 1997.

Both studies showed a lack of familiarity and interest by people with low levels of schooling. Given the fact that our mission states that we want to be a museum for "everyday persons", this target group should figure prominently in our marketing efforts. Our findings suggest that we have to invest more creativity and financial means into tapping this segment of potential visitors.

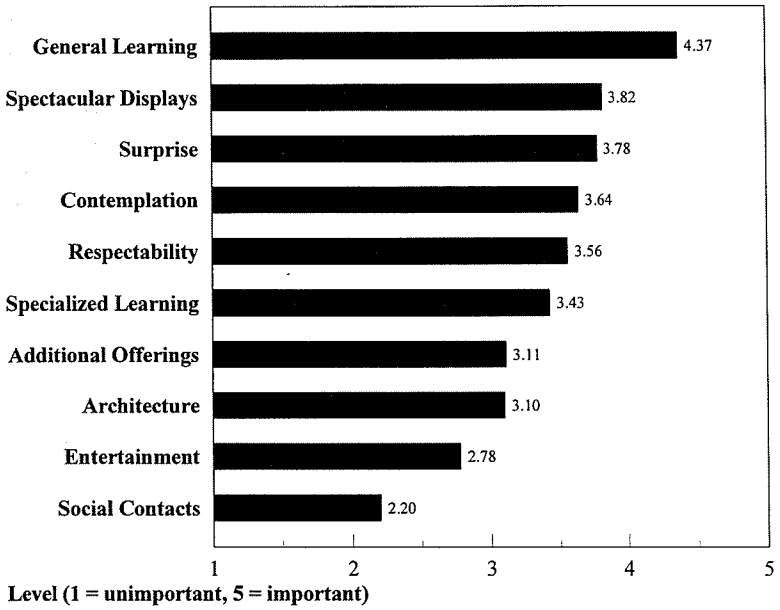
To summarize, in a time of tight cultural budgets it is mandatory to focus attention towards non-visitors. They are a museum's largest untapped source of future visitors. To activate this majority of the population is one of the most urgent tasks for museums in the future. Our institutions are well equipped to instill a sense of citizenship and common responsibility. Museums will play an even more important role in public life when we are able to attract people who are not yet museum-goers.

### References

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**Figure 1**  
**Evaluation of Motives to Museum Visits**

Mean = 3.38



**Figure 2**  
**Evaluation of Barriers to Museum Visits**

Mean = 2.05

