

Integrating Consumer Insights Into Communications

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Why You Need Market Research

Market Research Shows You How To Build Effective Communications For Your Consumers/Visitors

Market research opens you to your consumer by answering:

- Who is visiting your museum/event and what are their needs and goals?
- What key characteristics describe the individuals who use a specific tour, guide, or product?
- How should communications be tailored to fit user preferences?
- How to best communicate an event to capture visitor interest?

Research helps you discover your customers' characteristics, motivations, preferences, and needs allowing you to customize your communication strategy.

The Lack of Market Research Has Led Many Organizations To Make Poor Decisions

The Case for User Research – Facebook

Sept 6, 2006, Facebook adds key functionality in the form of News Feed and Mini Feed.

The Facebook enhancements were withdrawn less than 24 hours later due to a massive amount of negative user feedback.

Facebook changes weren't tested.



“Facebook Learns from Its Fumble”

“After an outcry over a news feed feature, the site is tightening privacy protections and promises to do market testing next time.”

*Business Week Online, Sept. 8, 2006

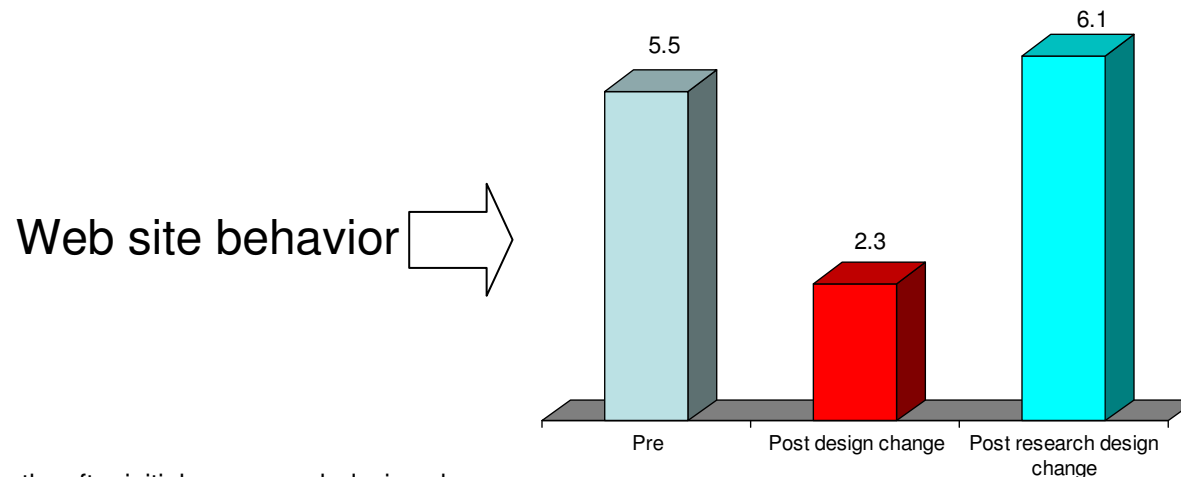
Market Research Can Provide Insights That Allow You To Improve Your Product Or Service

The Case for User Research – Discovery Channel online Video Player

Jun, 2006. Discovery launches new online video player to replace in-page video player to compete with fast moving network media sites.

Discovery saw a significant drop in video streams immediately after video player was launched.

After review of consumer feedback, Discovery's New Media team made changes that addressed the issues raised by consumers and video streams returned to pre-change levels and started to grow incrementally.



* Post research design change, 4 months after initial no-research design change

Market Research Uses Proven Tools To Obtain Insight

Attitude, Usage, and Visitor Profile Research: Research designed to provide a new perspective on the attitudes, behaviors, and expectations of museum visitors. Examples include online surveys, on-site surveys, and one-on-one interviews.

Product Development / Testing: Uses visitor feedback to guide the creation and evaluation of new product concepts. Includes usability testing to determine which product features are the most viable in a museum market or segment.

Promotion Evaluation: Assessment of concepts to determine which will deliver the most appealing message to the broadest range of visitors. Includes product positioning and ad testing for new and existing products.

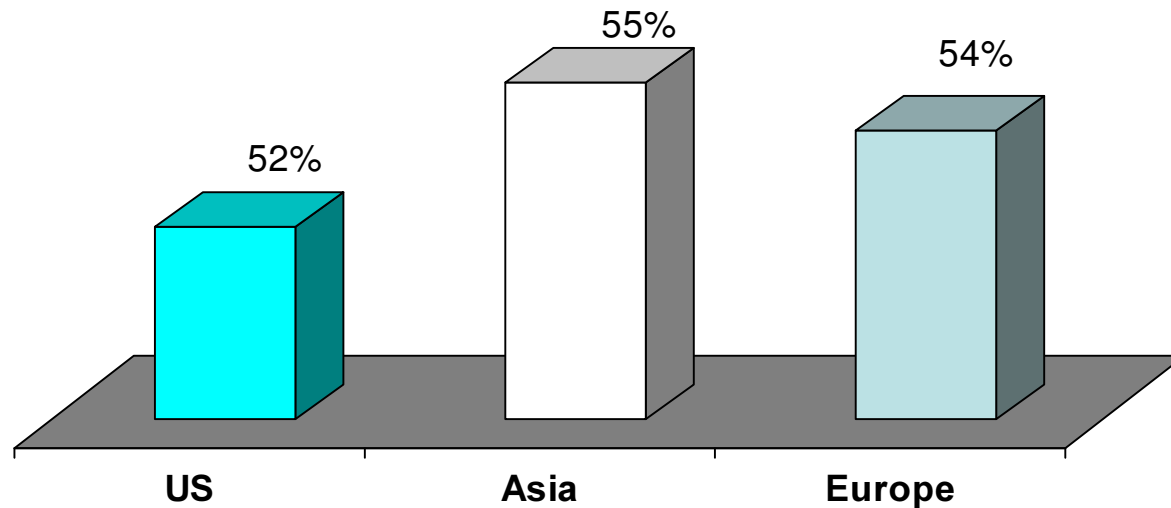
Segmentation Research: Identification of key groups within the museum audience based on mindsets, needs, attitudes, usage of media and emerging media platforms and behaviors. Segment data serves as a key input for museum communications, product development, and strategic planning.

Brand Equity & Tracking Research: Evaluation of key brand variables, such as brand recognition, perceptions of quality, its effects on pricing and intent to purchase.

Emerging Media Trends And The Impact On The Museum Experience

Half Of The Population Of Each Region Have Visited A Museum, Zoo Or Aquarium In The Past Year

Global Incidence of Cultural Activities



Q. How often do you do each of the following?: At a museum, zoo or aquarium (A few times a year)

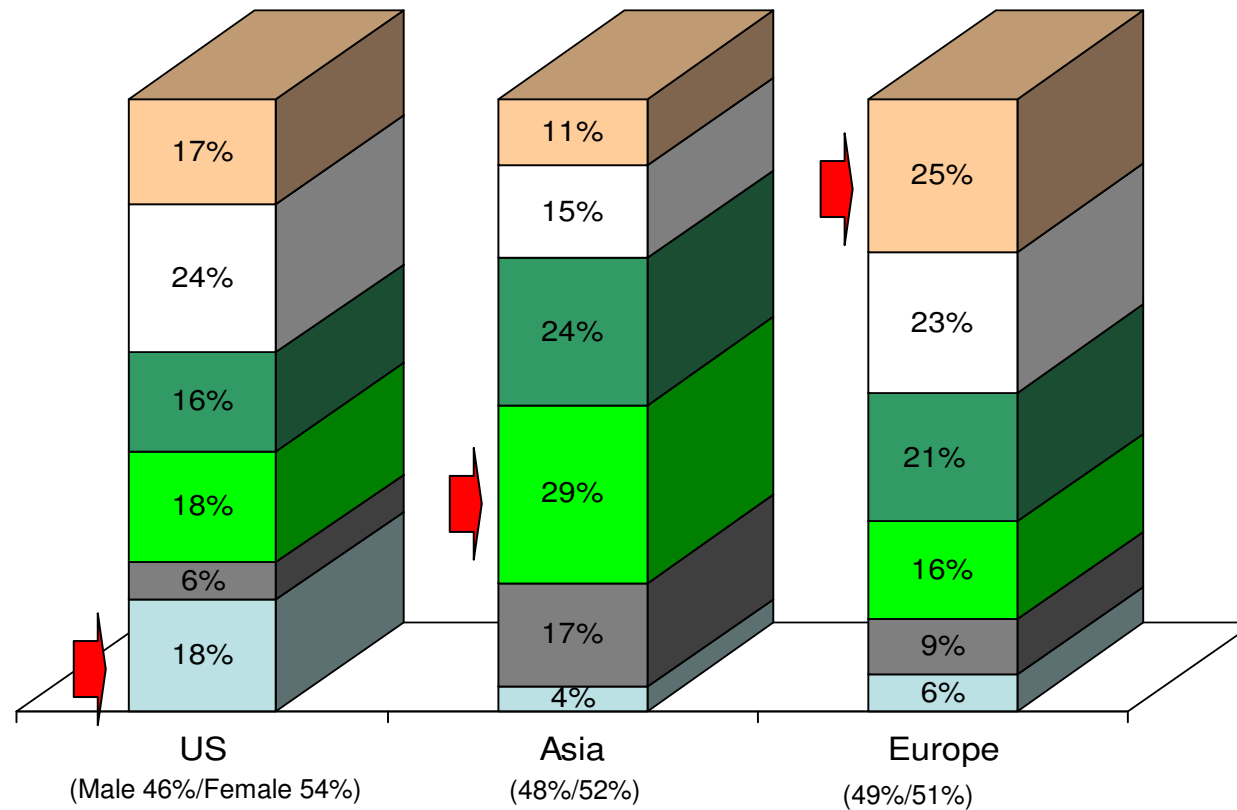
Source: Discovery Communications LLC: Global Emerging Media Survey 2007/08

One Size Doesn't Fit All – Museum Visitors Vary Demographically By Region

Region Breakout

Age Groups

- 55+
- 45 to 54
- 35 to 44
- 25 to 34
- 18 to 24
- 13 to 17

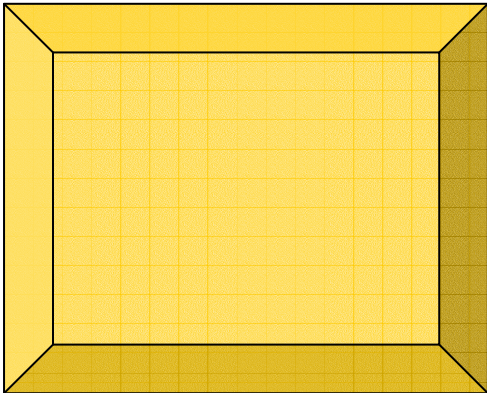
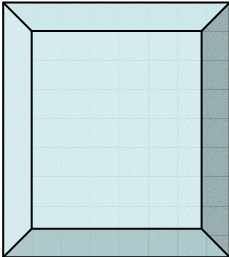
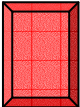


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Source: Discovery Communications LLC: Global Emerging Media Survey 2007/08

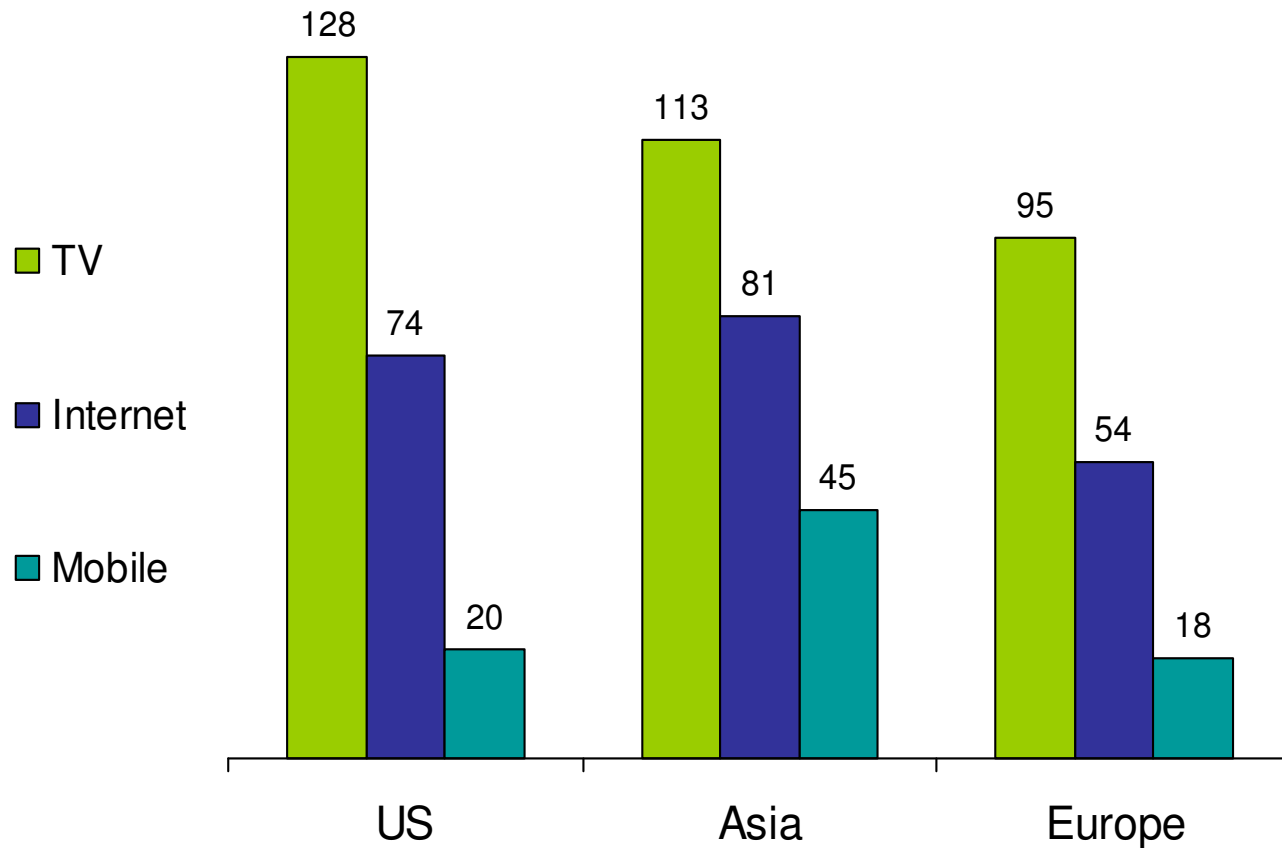
Introductions Of The Third Screen – Expanding Reach And Evolving The Nature Of The Media/Entertainment Experience

As emerging platforms of media have evolved, so too has *entertainment*

| | TV | Internet | Mobile |
|------------------------|--|---|---|
| |  |  |  |
| Movies | ✓ | ✓ | ✓ |
| TV programs | ✓ | ✓ | ✓ |
| News, weather, sports | ✓ | ✓ | ✓ |
| Search | No | ✓ | ✓ |
| User generated content | No | ✓ | ✓ |
| Community/Social media | No | ✓ | ✓ |

In Home Media Consumption – Its Not Just TV Anymore

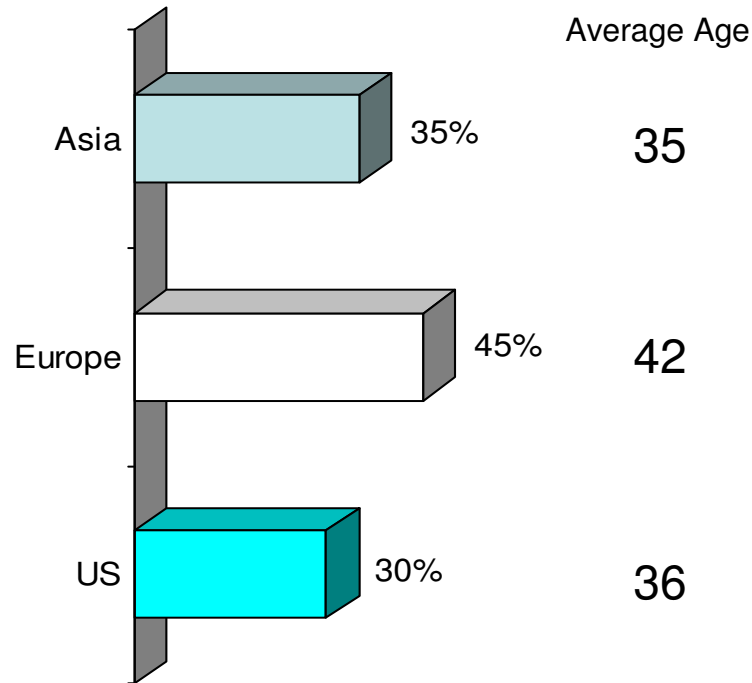
Time spent (minutes) in the **home** by platform



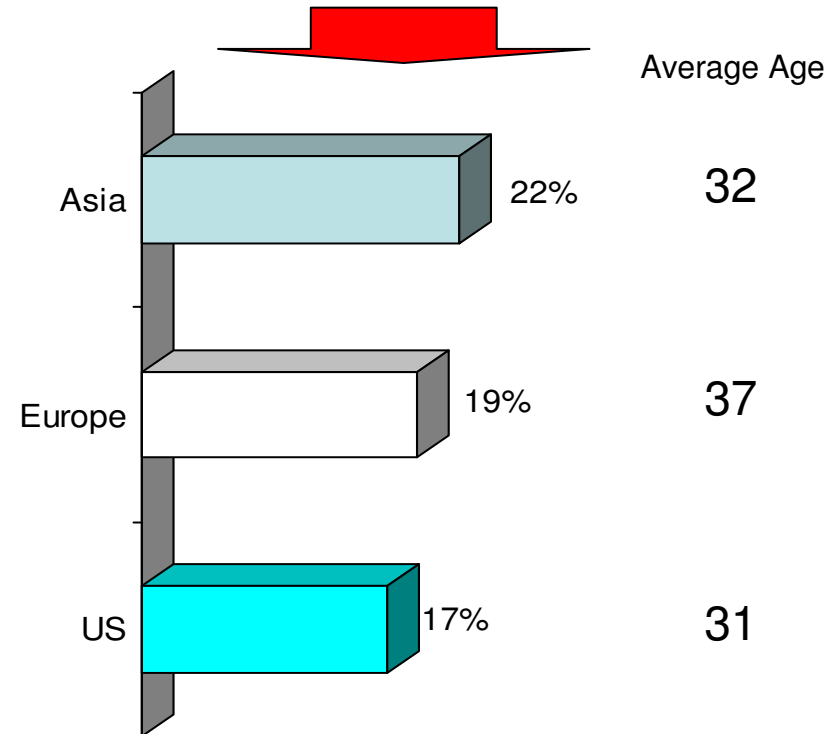
Q. (At home in the evening) How much time do you currently spend with TV/Internet/Mobile

Many Have Their Mobile Devices When Visiting Museums Zoo Or Aquarium

Have mobile device while visiting...



Interested in accessing media/content via mobile device while visiting...



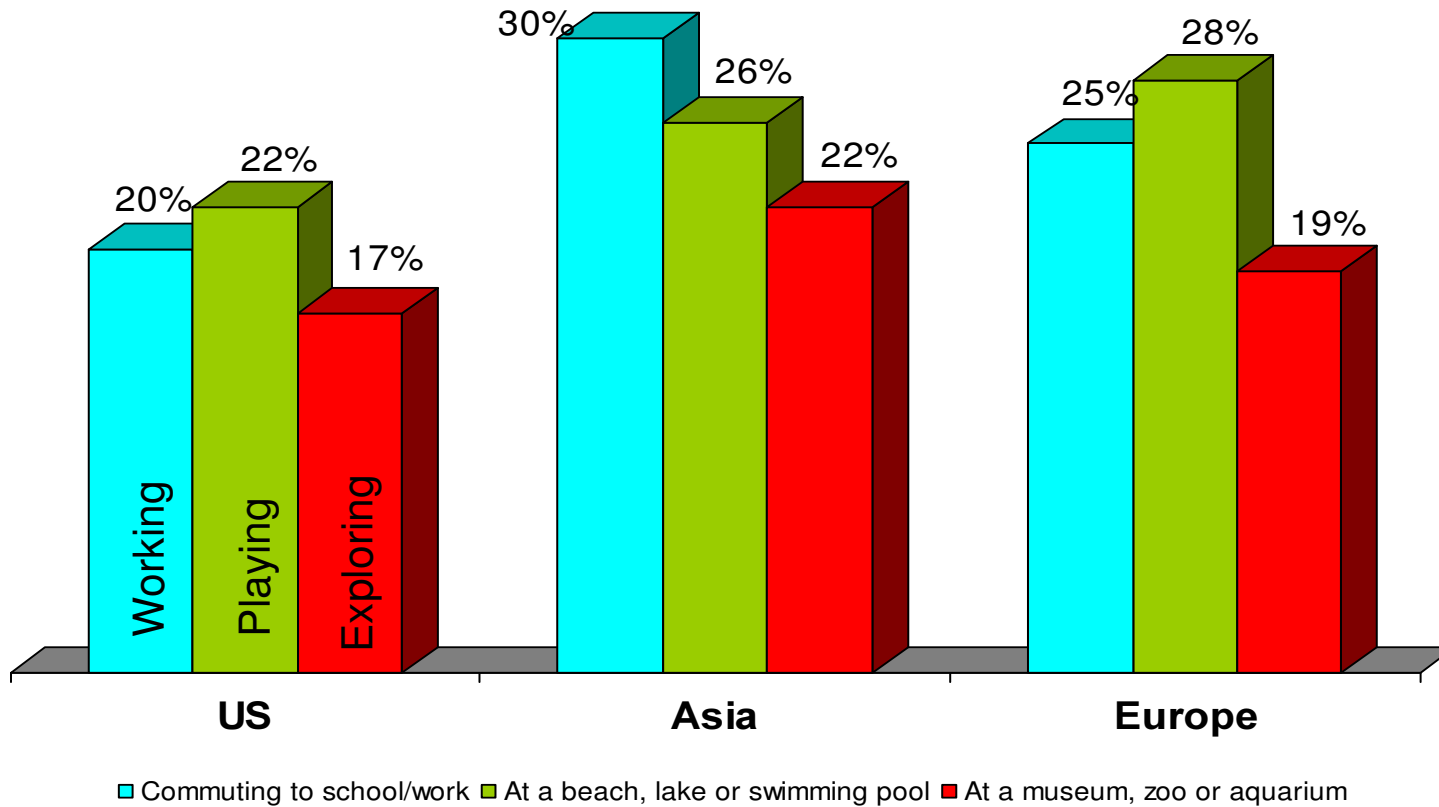
Q. During which, if any, of the following situations do you usually have your mobile device with you?

Q. In which of the following situations would you be interested in accessing media/content on your mobile device, if any?

Source: Discovery Communications LLC: Global Emerging Media Survey 2007/08

Accessing Mobile Content At A Museum Is (Soon Will Be) As Natural As At Work Or Play

Interest in accessing media content when...



Q. In which of the following situations would you be interested in accessing media/content on your mobile device, if any?

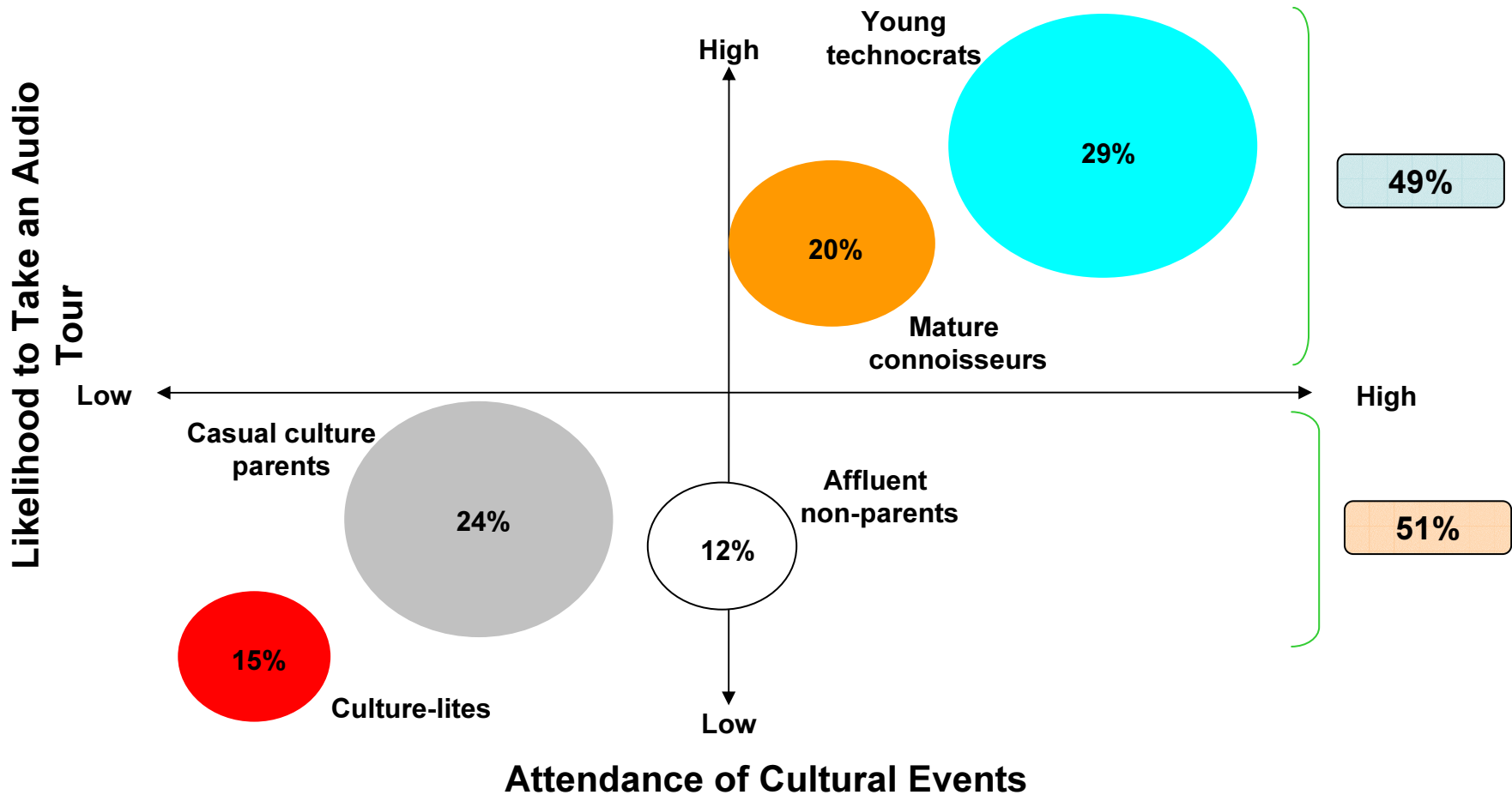
Source: Discovery Communications LLC: Global Emerging Media Survey 2007/08

Segmentation of the US Museum Visitor: Constructing a Framework

Antenna Audio Used A Segmentation Study To Provide Insight Into How The US Museum Visitor Population Is Evolving

- US general population conducted in Q3-07 (n=3,000) to assess attitudes and behaviors with regard to cultural events
- Survey data used to segment US museum visitors
- The results yielded 5 distinct groups

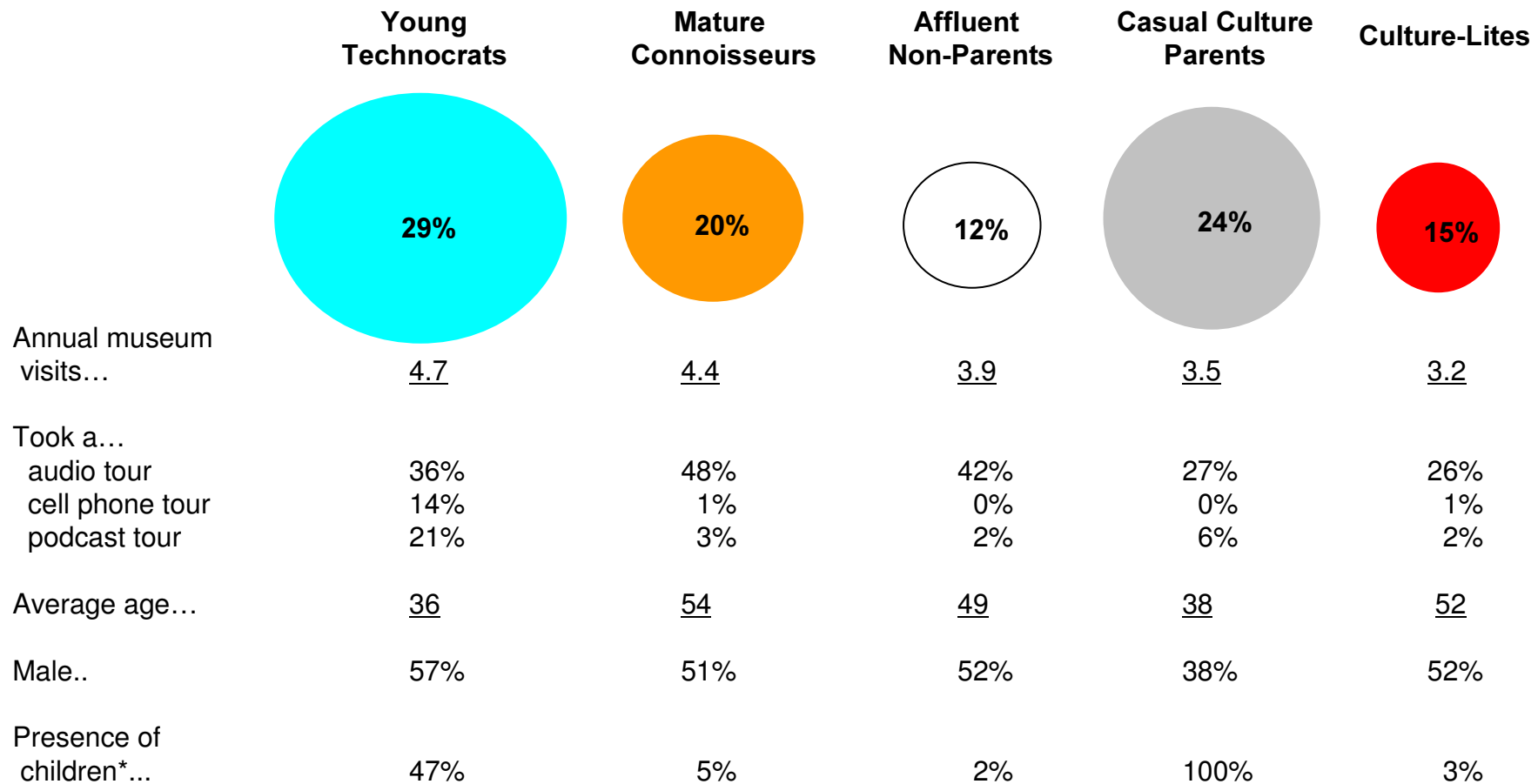
Young Technocrats And Mature Connoisseurs Have The Highest Attendance Rate For Cultural Events And The Greatest Propensity For Audio Tours



All respondents have visited a museum or historic site at least once in the last 12 months

Source: Discovery Communications LLC: US Museum Visitor Study Fall 2007

Although The Segments Were Defined By Attitudes And Behaviors, Each Has A Distinct Demographic Profile



* Children in the household under 18

Source: Discovery Communications LLC: US Museum Visitor Study Fall 2007

Young Technocrats



The Heaviest Consumers Of Culture And The Most “Wired,” Young Technocrats See Cultural Events As An Opportunity To Socialize With Their Friends



Bio: Young Technocrat

Name: Nina Franconi

Age: 29

Occupation: Product Manager

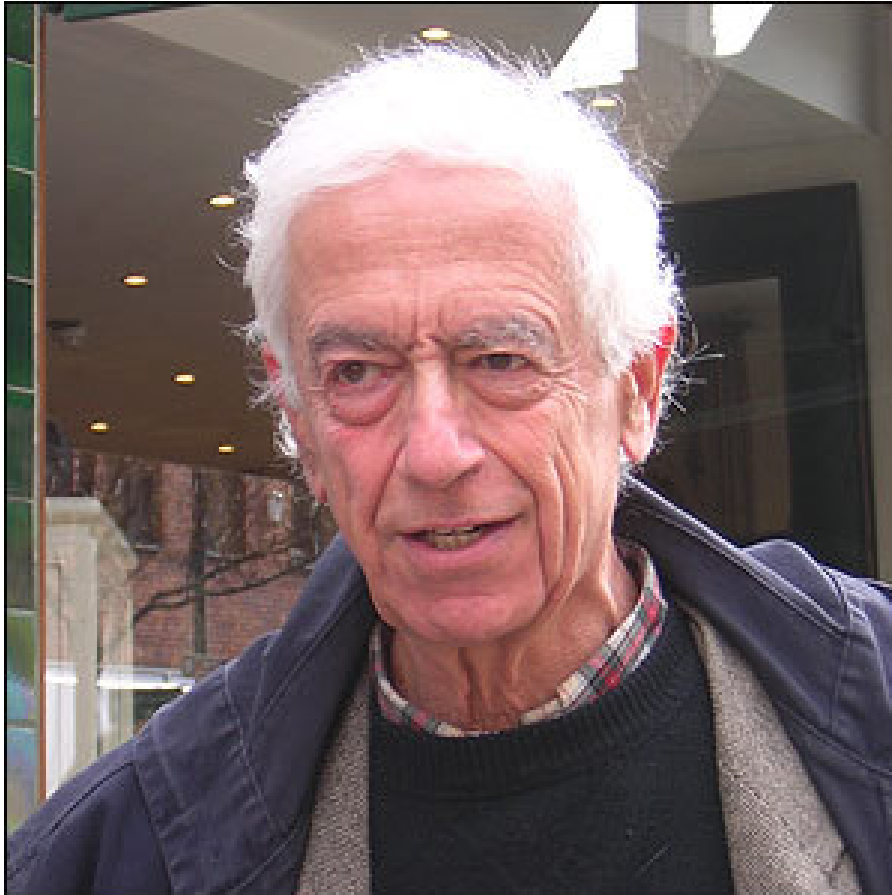
Residence: New York City

Passions: Music, cooking, and photography.

Nina loves trying out the latest technology. She has over 2000 songs on her iPod, two computers at home, and her own website where she posts photos of her friends and family. It's not uncommon for Nina to take in a play, visit a museum, and go to a concert all in the same week.

Quote: “I enjoy most museums, but after a few hours I'm ready to do something else.”

The Second Largest Segment, Mature Connoisseurs, Are Also The Heaviest Users Of Tours Because They Want To Learn From Their Experiences



Bio: Mature Connoisseur

Name: Robert Herstrom

Age: 70

Occupation: Retired History Professor

Residence: Seattle

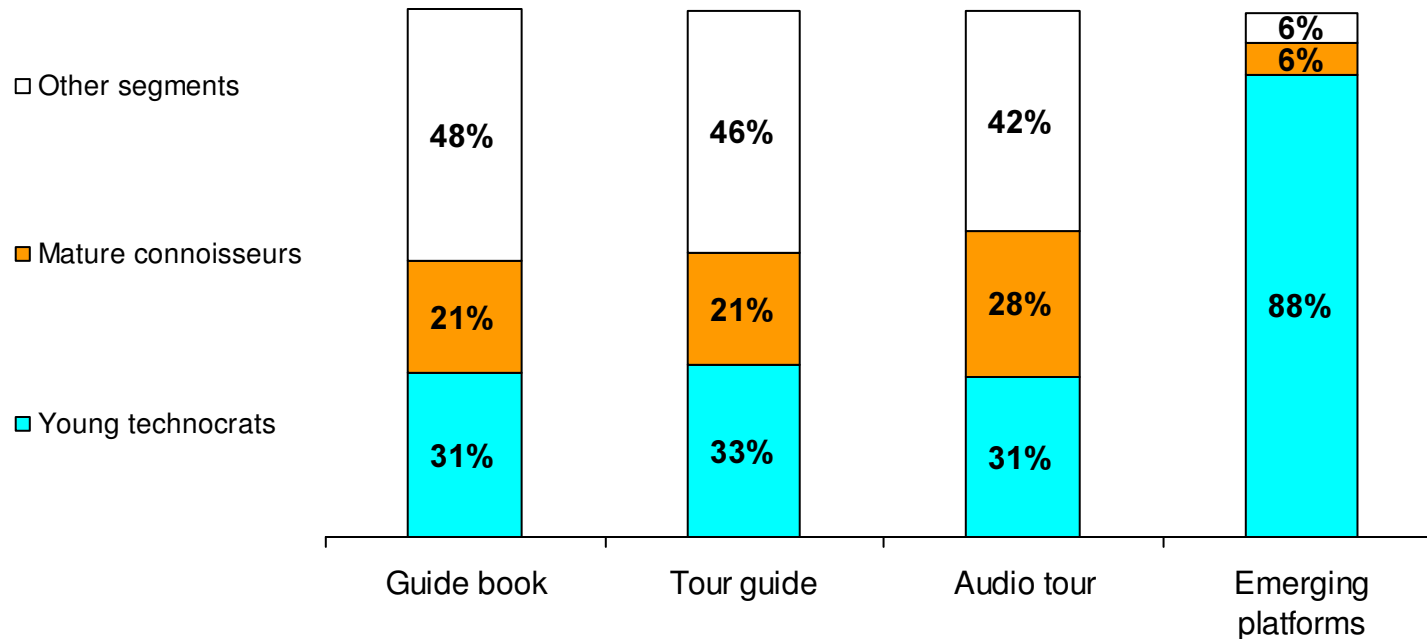
Passions: Art, Music, and Hiking

Since he retired, Robert has been taking advantage of the local culture his city offers. He and his wife Laura are members of several local museums, and Laura often buys tickets to a variety of performing arts events she thinks they might enjoy. Robert is comfortable with most technology – he recently bought an HDTV for the house and he and Laura have shared a computer for years. He has a mobile phone, but rarely uses it.

Quote: “My wife and I can spend the whole day at a museum and never lose interest.”

Young Technocrats And Mature Connoisseurs Dominate Traditional Tour Usage, Yet Young Technocrats Alone Define Emerging Media Products

Segment Percent of Tour Usage



Source: Discovery Communications LLC: US Museum Visitor Study Fall 2007

One Way To Customize Communications To Young Technocrats Is Offer Content On Familiar Platforms

The potential of mobile

New 3G iPhone

- Phone, iPod, Internet and more...
 - Browse anywhere
 - Zoom
 - Clip it
 - Video
 - Map with GPS
 - SMS text
 - E-mail



Young Technocrats

- A cool device that appeals to me (young visitors)
- I own one
- I can obtain images with audio content
- Its on my own iPod/iPhone/MP3
- I can get connected - iTunes

Case Study #1: Product Evaluation Survey, *Louvre*

Conducted in partnership with The Louvre

Market Research At The Louvre Provided Key Insights To Visitor Expectations

A study was conducted at the Louvre to assess multimedia tour - functionality of the device and the appeal of its content (English and French)

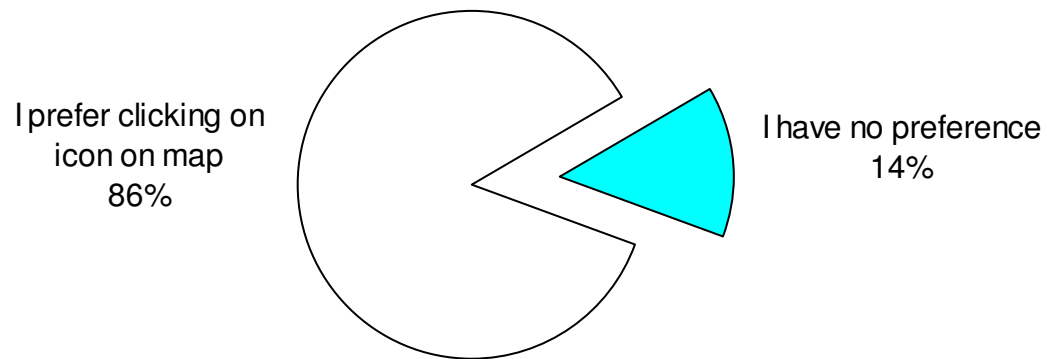
Participants took one of two tours:

- Random Tour – participants to view any artwork in any order they chose
- Linear Tour – participants viewed artworks in a defined sequence

Visitors Overwhelmingly Prefer To Click An Icon Rather Than Entering A Number On A Key Pad

Random Tour Only

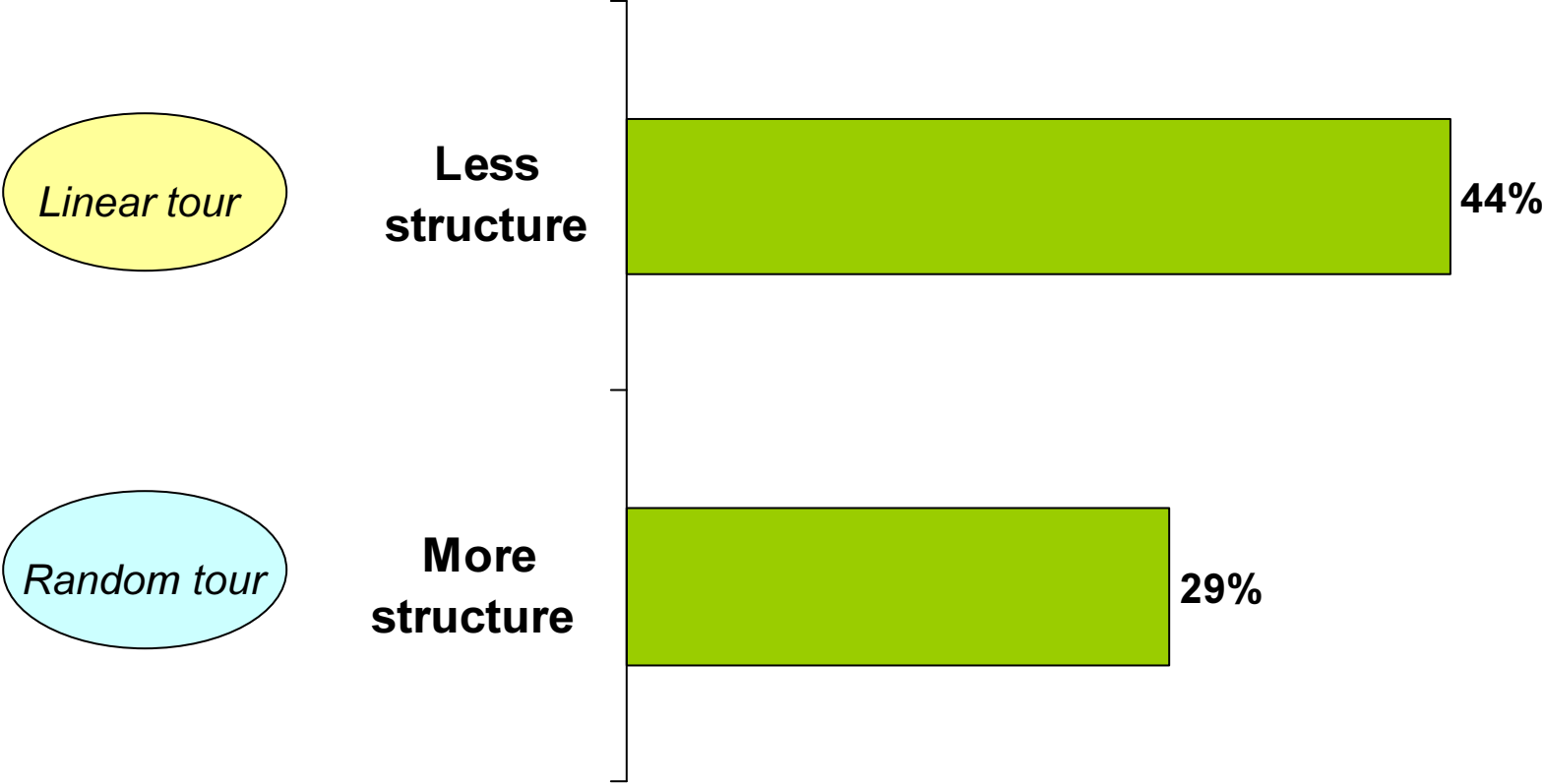
Preference To Enter A Number Or Clicking On The Icon On The Map To Access Information On Particular Piece Of Art



Q. When you want to listen to the information about a particular piece of art, do you prefer to enter the number for that art object into the keypad or would you rather click on the icon on the map?

The Multi-media Device Provided Visitors With The Freedom To Roam/Browse The Museum And Provided A Less Structured Experience

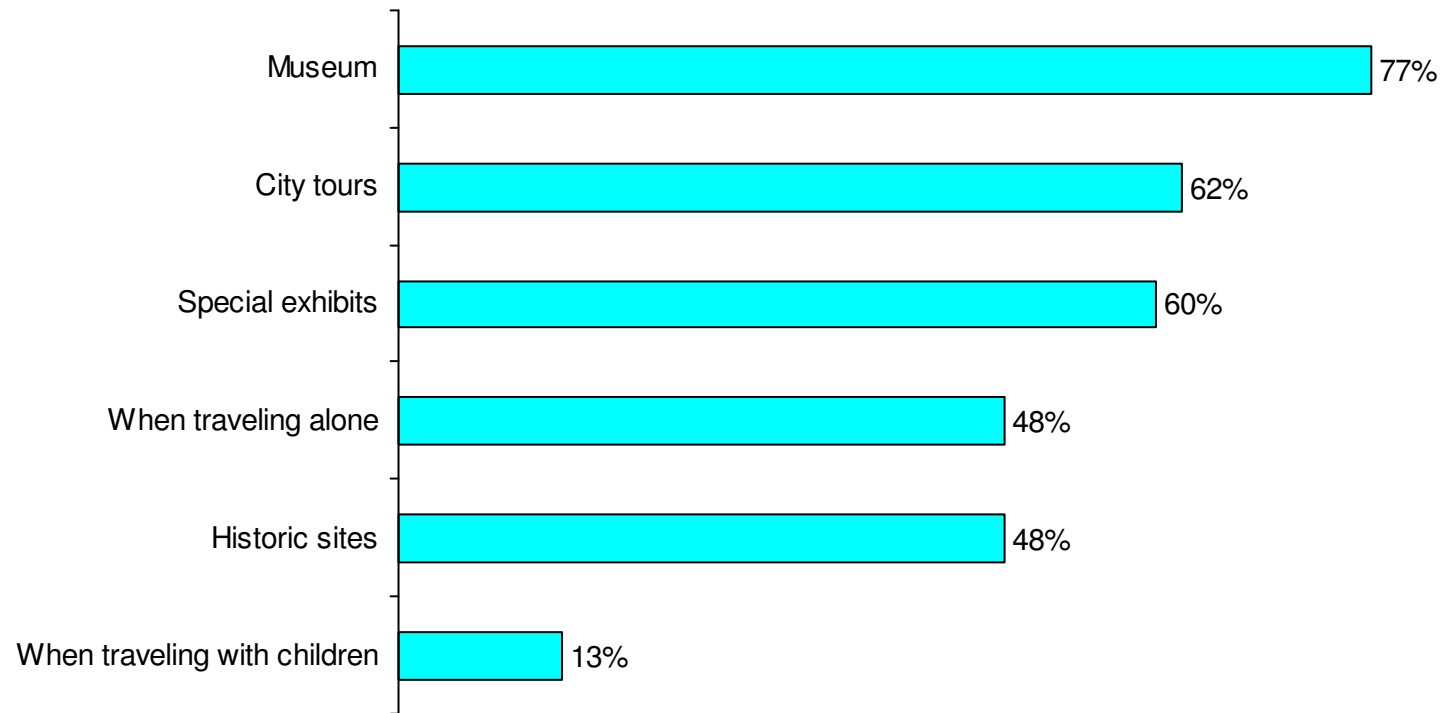
Preference for Less Structure Tour



Q. (Linear) Would you prefer taking an audio tour that is less structured and allows you to look at any piece of art at any time?/(Random) Would you prefer taking a more structured audio tour covering only selected artworks?

Visitors Found The Multi-Media Product Ideally Suited For Museum, Special Exhibits, And City Tours

Ideal Multimedia Formats (top 2 box)



Q. For what sort of exhibits or situations do you think this device is best suited:

Louvre Study Results

Overall, visitors found the concept of the multimedia tour appealing, with these high ratings also comes high expectations.

The random multimedia tour clearly provided visitors a broader more flexible experience than the structured linear tour.

Although best suited for museum use – the multimedia device has appeal outside the museum.

Case Study #2: Mobile Phone Tour, *Tate Britain*

Conducted in partnership with Tate Britain

Research At Tate Britain Provided Insights On How To Improve Usage Of Mobile Phone Tour

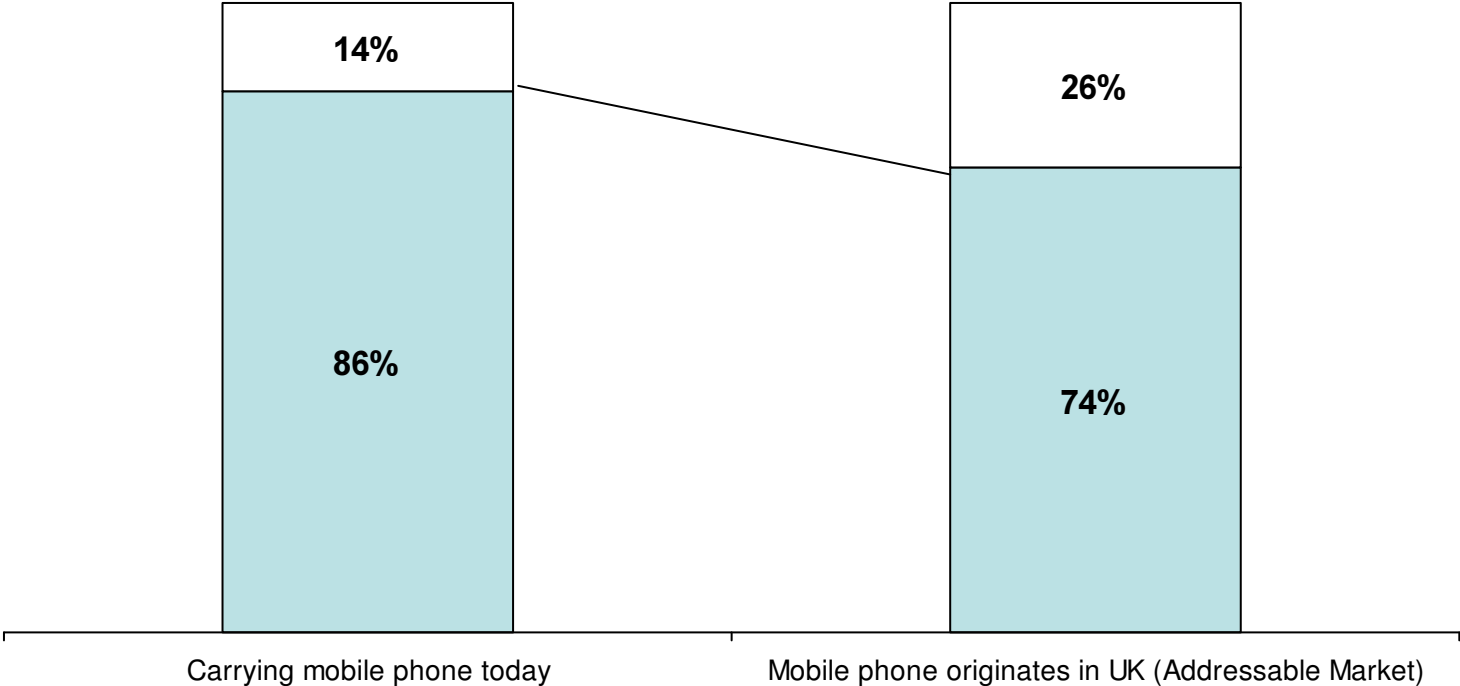
The objective of the study was to assess the usability and appeal of the tour

The study was broken into three parts

- A survey of museum visitors to evaluate the mobile phone tour concept and identify the addressable market
- A survey of mobile phone tour users to evaluate the usability of the tour itself
- A survey of exhibit visitors (tour users and non-users) to evaluate the effectiveness of the tour marketing

The Study Found That Three Out Of Four Visitors Had The Ability To Take The Mobile Phone Tour

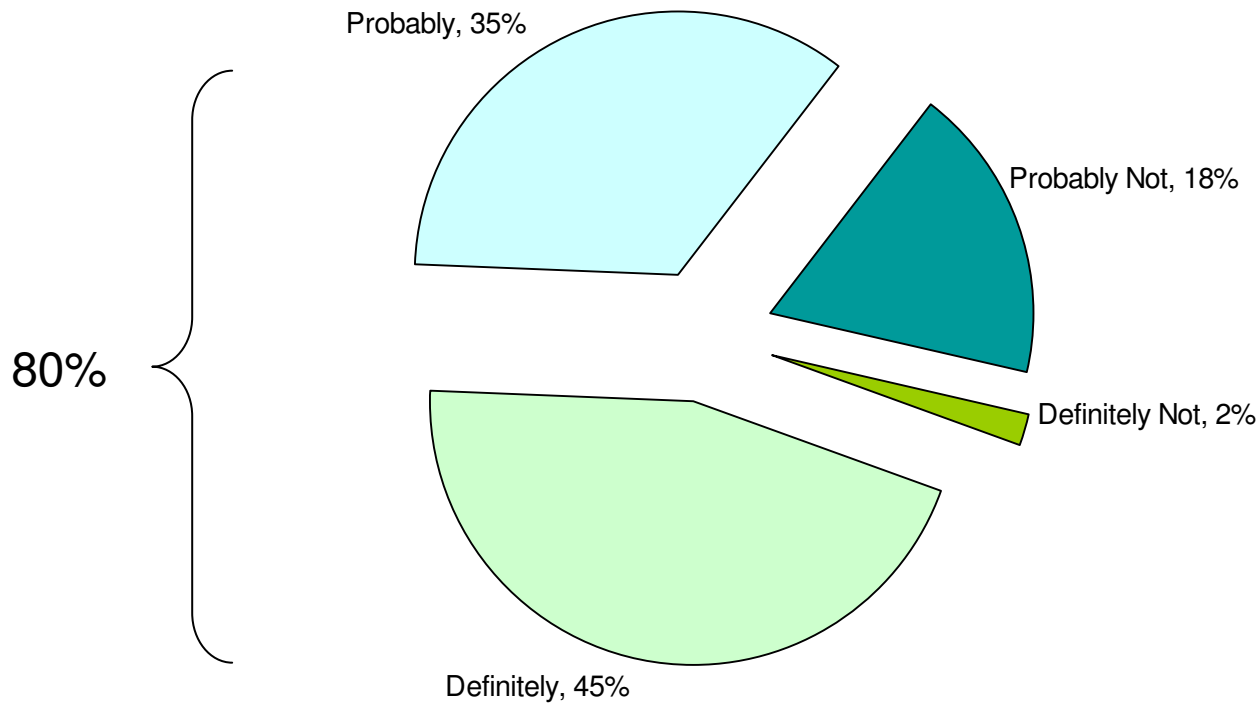
Addressable Market



Q. Do you have a mobile phone with you today? Does your mobile phone service originate in the U.K.? (i.e. do you pay for your mobile phone service in the U.K.?)

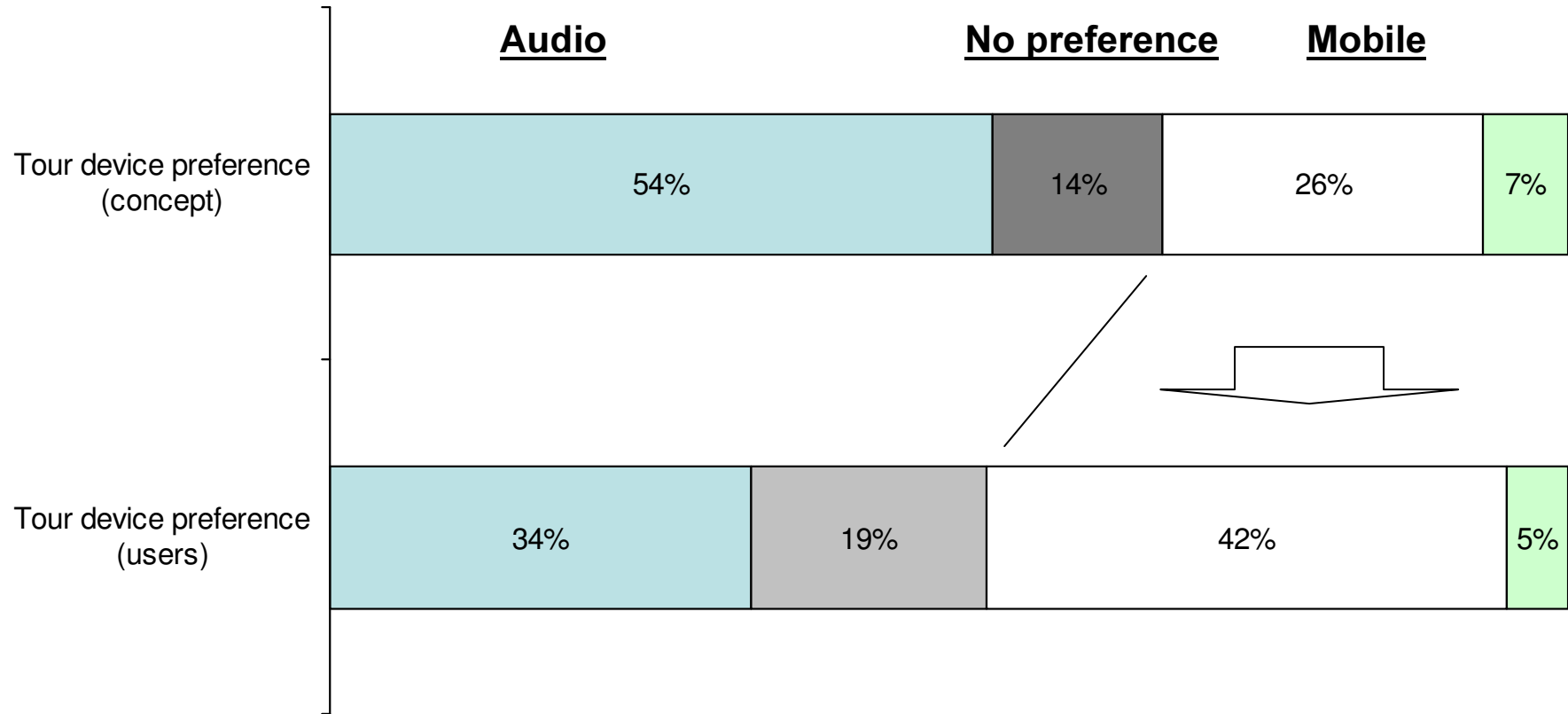
Among Those Who Did Take The Tour, The Majority Indicated That The Mobile Phone Tour Enhanced Their Exhibit Experience

Mobile Phone Tour Enhanced Exhibit Experience



Q. Do you think the information you received from the mobile phone tour enhanced your exhibit experience?

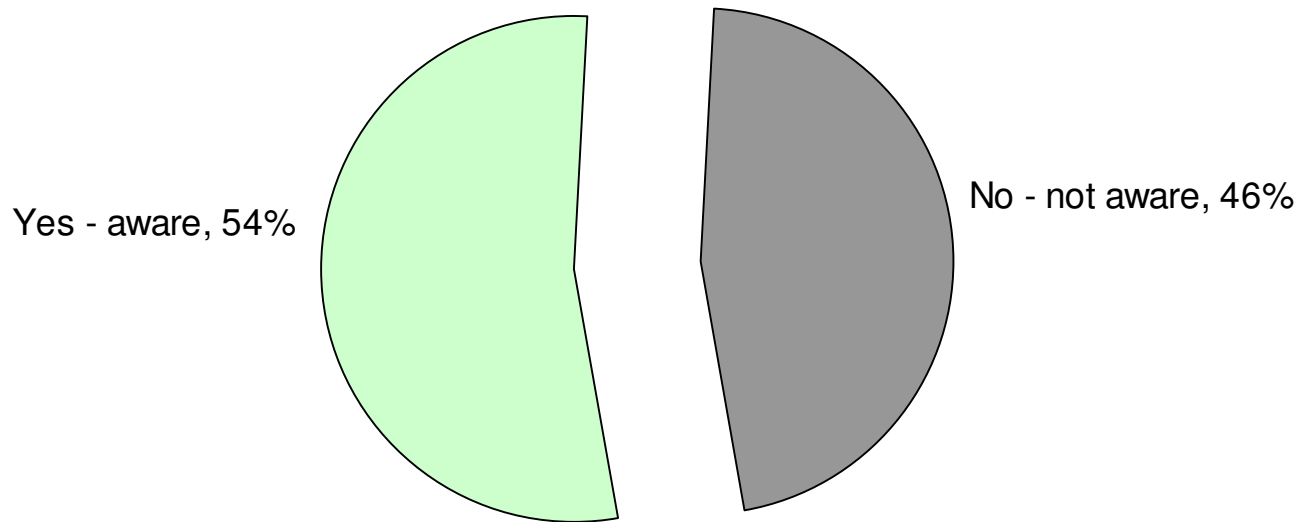
Mobile Phone Tour Preference Increased By More Than Half For Mobile Users, Indicating That Lack Of Experience Is One Of The Primary Barriers To Mobile Tour Usage



Q. Would you prefer to take this tour using an audio device rather than your phone if possible?

Half Of Turner Prize Retrospective Exhibit Visitors Were Aware Of The Mobile Phone Tour, Indicating Tour Marketing Could Be Expanded To Increase Usage

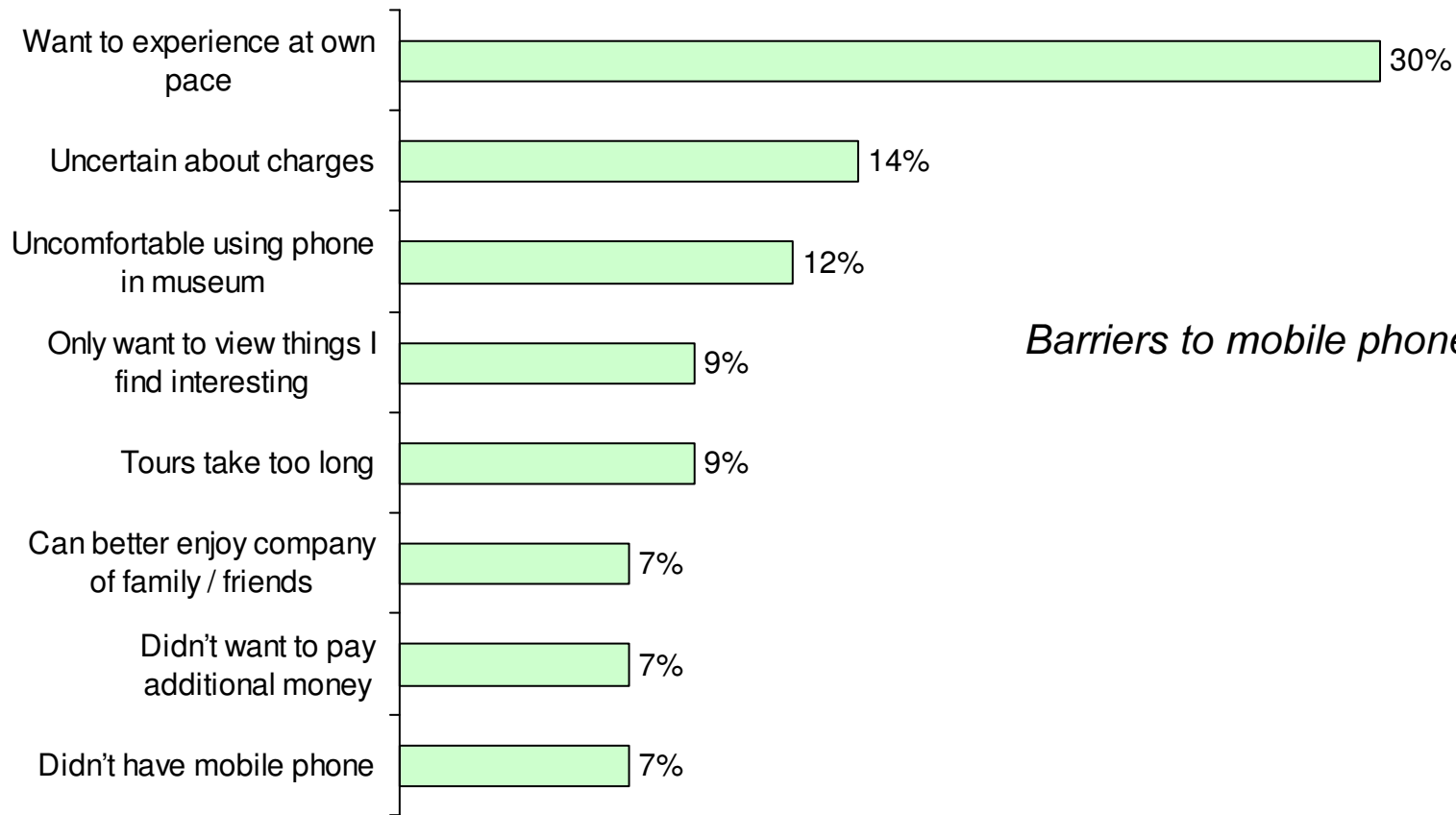
Awareness of Mobile Phone Tour



Q. Were you aware that a mobile phone tour was offered for the Turner Retrospective?

However, Awareness Is Not The Only Barrier: Lack Of Flexibility, Cost Concerns, And Social Acceptance Also Prevented Visitors From Using The Mobile Tour

Reasons For Not Using The Mobile Phone Tour



Barriers to mobile phone use

Among those aware

Q. Why didn't you take the mobile phone tour

Tate Britain Study Results

Despite the large addressable market for mobile phone tours, visitor adoption is low because of a lack of familiarity with the mobile phone tour experience.

The majority of visitors who have used a mobile phone tour find that it enhances their museum visit and are more likely to use a mobile phone tour in the future.

Converting visitors to mobile phone tour users requires communications that increase awareness and messages that address consumer hesitation and skepticism.

The Need For Research In An Evolving Consumer Landscape

Case Study Implications

Results

Learning and **entertainment** are part of the museum experience

=

Implications

Multi-media and audio tours **increase** museum experience **satisfaction**

Providing **content options** are essential in engaging museum visitors

=

Understanding visitor **motivations** and **expectations** are key to delivering an entertaining and engaging experience

Multi-media devices are playing an increasing role in consumer's everyday lives – delivering content and entertainment **when** and **where** consumers want it

=

Extending and **integrating** multi-media into the museum experience will be essential to engaging visitors and meeting expectations – especially for younger visitors