North West Hub: Visitor Research 2004-06

Renaissance in the Regions: A New Vision for England's Museums

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North West Hub: Visitor Research 2004-06

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This report explores the existing and potential **markets** for the members of the North West Hub.

It provides data that **benchmarks** the progress North West Hub makes against its objectives and targets.

It shows that North West Hub is **successfully** attracting true new users.

It explores why people do and do not attend and how North West Hub can attract even **more** new visitors.

Contents

1 Executive Summary

This is a summary of the findings of a research programme that provided North West Hub with a socio-demographic profile of its existing attenders; an understanding of the motivations, responses, behaviour and outcomes of current visitors; an analysis of the size of the potential market and an understanding of the perceptions, attitudes and barriers to attendance of the potential market. This data has subsequently served as a benchmark against which to monitor progress and informed the North West Hub's audience development strategy.

The methodology employed was a rolling visitor interviewer-led survey carried out in each of the Hub museums, focus groups with potential attenders and secondary research using extant data sources, many of which have been provided by the MLA.

The North West Hub venues are Manchester Art Gallery, Whitworth Art Gallery, Manchester Museum, Pump House Museum (first partner), Bolton Museum and Art Gallery, Harris Museum and Art Gallery, Tullie House Museum and Art Gallery.

1.1 Who is visiting now?

The objectives of Renaissance in the Regions and of the PSA targets are concerned with increasing the number of people who visit museums, and attracting a representative cross-section of the population to museums and art galleries. In the majority of regions this means increasing the number of children and young people and diversifying the audience to ensure that there are more visitors from C2DE socio-economic groups, BME groups and people with disabilities and special needs.

At present all of the venues are attracting expected or higher than representative proportions of 15 – 19 and 20 – 24 year olds with the Whitworth and Manchester Museum attracting the most, probably because of their campus locations.

Most venues attract expected or higher than representative proportions of 55-64 year olds except for People's History Museum and Manchester Museum.

Manchester Museum has the greatest family appeal amongst the Hub venues. Two of the three museum and gallery venues (Tullie and Bolton) are also attracting a high proportion of family groups. Compared to these, Manchester Art Gallery and the Whitworth attract low proportions of family groups, and therefore, children.

The representation of socio-economic groups C2DE is good to high in four out of the six Hub venues. The Manchester and Whitworth Art Galleries have the lowest representation.

Manchester has the most ethnically diverse population of the four Hub localities and the Manchester venues have the highest proportions of non-white British visitors. Manchester Museum in particular is succeeding in drawing in Black, Asian and Chinese visitors. Bolton is also performing reasonably well in terms of drawing in Asian visitors.

The proportion of disabled visitors shows little variation between the venues, making up between 3-8% of visitors.

About 30% of visitors at all the Hub venues work in the health, social services or education sectors.

The local authority museums and galleries outside Manchester, have a much more local audience than the Manchester venues. Tullie House attracts tourists and the Manchester venues draw visitors from the other local authorities within the AGMA region, as well as national and international visitors. The People's History Museum has the greatest proportion of visitors from outside the region.

Bolton and Harris have the highest proportions of true new users amongst their visitors. The proportions of true new users at the Manchester venues are low.

1.2 Why are people visiting?

The majority of visits across all Hub members are intentional; Harris attracts the highest proportion of spontaneous visits.

Between 18 and 39% of visitors with internet access had accessed the museums' web-sites.

Boards and banners, local and national press coverage, leaflets picked up and word of mouth are the most effective means of finding out about venues.

The majority of visits to all venues are driven by social and intellectual motivations.

1.3 Behaviour and impact

Manchester Museum and Tullie House have the highest proportion of visitors staying for more than two hours.

Visitors to Bolton, Harris and the Whitworth tend to have shorter visit duration than the other venues, these are also the venues with the highest proportion of incidental visitors.

Visitors are mainly coming to the Hub venues to see the collections rather than the temporary exhibitions; in most cases a third of visitors were exhibition driven whilst twice as many visitors (57-61%) came to see the permanent collections.

The data reveals that Hub museums are more successful in engaging visitors than the art galleries.

Satisfaction levels are variable, showing no major issues but levels at Bolton and the Harris are lower than elsewhere. Propensity to return tends to be consistent with high levels of local visitors.

1.4 Measuring visitors against PSA targets

PSA1 School visits

Hub achieved 98% of its target for visits by school children in 2004-05

38% of school visits were made to Manchester Museum

85% of school visits made by pupils in Year 1 to Year 6

Untapped schools market is mostly for secondary school visits

PSA2

Hub achieved 48% of its PSA2 target for 2004-05 in final quarter of 04-05.

Bolton Museum and Art Gallery is most successful in attracting C2DEs

Manchester venues are most successful in attracting BMEs

Bolton Museum and Art Gallery and Manchester Museum accounted for 70% of the Hub's total for PSA2

1.5 The size of the potential market

Using secondary data available to us the size of the current museum market in the North West could range from 0.5 million to 1.6 million people.

There are no published estimates for the size of the *potential* market for museums and galleries. Information on this market is a critical piece of market intelligence for the Hubs, as PSA2 focuses entirely on the acquisition of true new users, and these, by definition, constitute the potential market.

We estimate that the Hub venues have achieved between 3% and 10% penetration of the *current* museum and gallery market within their 30 minute drive time and that Tullie House has achieved 45% penetration of their 30 minute catchment area.

This reveals that there is significant scope for the Manchester venues, Bolton and Harris to increase their numbers of local visitors from the current and potential museum and gallery market. For Tullie House this is more of a challenge.

1.6 Perceptions of non attenders

The research explored reasons for non-attendance at the Hub museums. Common factors emerged:

- lack of awareness of the organisations
- about changing programmes
- events and activities targeted at families and children
- the quality of the collections, buildings and facilities

Negative perceptions, often borne of very old memories, also deter visiting. Regional museums are seen as unchanging; as being dark, dusty, old fashioned and often irrelevant to local people. The image held is of static displays, unfriendly staff and unremarkable collections.

Non-visitors associate visiting museums and galleries with risk. The risks are the possible costs; the hassle of finding the venue, transport and parking; the danger of a visit leaving family members or companions disappointed; the risk of feeling inadequate or embarrassed. Visiting a museum is also often seen as an activity requiring proactivity and this equates to hard work. It is therefore not recognised as a relaxing leisure activity by non-attenders, but as a challenge.

1.7 Who might visit, why and how do we reach them?

We can divide the existing and potential market for museums and galleries into five broad segments: attenders; intenders; open to persuasion; resistors and rejectors.

Audience development strategies should target their limited resources at the first four of these segments as it costs too much in human and financial resources to convert hardened rejectors of museums and galleries.

Children are classic *intenders*. They are positive about the prospect of visiting museums, and although less so for art galleries, are open to the idea that these can be fun and rewarding places. Children can be powerful advocates of a visit to their parents.

Children need to be reassured that venues offer levels of interactivity that will engage their curiosity and offer shared experiences with family members. The proposition needs to be clearly communicated with children's needs in mind.

Non-attending parents tend to fall into the *open to persuasion* group. Parents from C2DE socio-economic groups in particular fear that a museum or gallery visit will be boring, will be over too quickly, will not offer enough value to justify the investment of time and effort that goes into organising a family visit. Parents also fear that there will be too little information and that they will find themselves unable to facilitate their child's visit. The result will be feelings of embarrassment and inadequacy.

This group needs to have their awareness stimulated through mainstream advertising and promotion and they need to be reassured that visits will be rewarding for all members of the family and facilitated through lots of hands-on activity and assisted discovery.

Social visitors visit museums whilst on holiday but hold negative attitudes towards local museums. These potential visitors need to be made aware of the strengths of their local museums, need to feel a sense of pride and confidence in them and be given regular new reasons for visiting.

Resistors are not convinced that museums or galleries can offer them anything of value and often feel they will be inadequately equipped to know how to visit. This group needs direct assistance to entice them in, in the form of outreach work, group visits, special invitations and specially targeted events.

Rejectors are actively hostile to the idea that museums or galleries hold anything of value or relevance to them. It would take considerable resources to change these views.

The audience development strategy for North West Hub requires three main strands:

Product development

Hub venues need to prioritise re-displays and up-dating of collections, and in some cases buildings. The image of anachronistic, irrelevant places needs to be shrugged off and venues need to be seen to emerge into the twenty first century in order to combat the negative perceptions of non-attenders.

Priority should also be given to projects to develop modern facilities such as toilets, cafes, shops, education spaces.

Programme development that introduces a more dynamic programme, specially targeted events, partnerships with other agencies should also be prioritised.

Organisational development

Hub museums need to develop into modern, outward-facing, user-focused organisations. This means developing a culture of customer care, child friendliness, community engagement. Priority should be given to projects that focus on staff training and awareness, community consultation and partnerships.

It may be necessary for venues to prioritise Hub funding on the development of outreach departments and resources.

Market development and penetration

High profile, mainstream communications is needed to combat the issue of low awareness. It is important for regional museums to connect with local people as a source of pride and curiosity.

Families in particular need to be targeted through schools and child-focused communications material, supported by events and programming.

Outreach work should focus on making collections virtually and physically accessible beyond the museum buildings and on stimulating group visits through such initiatives as Test Drive and specifically-focused projects.

2 Introduction

The North West Hub is a partnership between six museums and galleries: Manchester City Galleries, the Whitworth Art Gallery, Manchester Museum, Bolton Museum and Art Gallery, Harris Museum and Art Gallery and Tullie House Museum and Art Gallery. This group, along with four first partners (Museum of Science and Industry in Manchester, People's History Museum, Manchester and Lancashire County Museums Service) are the focus for a two-year initiative to establish a progressive programme of top quality and relevant museum and gallery provision across the region.

Along with funding for this partnership initiative from the Museum, Libraries and Archive Council the Hub partners are expected to demonstrate the impact of this increased investment in provision by meeting MLA targets to ensure that the visitor profile of each venue changes to more closely reflect the social profile of the region. Specifically it is assumed that this will mean increasing the number of new visitors and in particular children, people from social classes C2D and E and people from black and minority ethnic groups.

2.1 Objectives

The objectives in the client brief for the visitor research are summarised below:

1. Increase understanding of the market-penetration of the sector, to better understand potential audiences in relation to the demographic profile of venue catchment areas

2. Benchmark present visitor profile consistently across the core Hub membership

3. Gather data over the two years of the Hub funding to monitor progress made in changing the visitor profile from what it is now, to better reflect the social profile of the region

Specifically, the objective is to gain an understanding of the profile and behaviour of visitors and non-visitors, in relation to:

- Awareness of venues and services
- Perceptions and expectations of venues and services
- Levels of museums and gallery visiting presently
- Possible reasons for non-visiting, selective visiting or lapsing
- Motivations for visiting
- Conditions and pre-requisites for visiting
- Present information sources and media used
- Decision making process
- Awareness of publicity and reactions to publicity and services on offer
- Responses to potential audience development initiatives

In addressing these objectives the research gathered a large amount of quantitative and qualitative data. In order to make best sense of this we have addressed the brief against the following headings:

Who is visiting now?

This section gives an overview of the socio-demographic profile of current attenders and sets this against the profile of the North West, England and the relevant Local Government areas.

Why are people visiting?

This section explores the motivations driving current visitors and compares this data with national norms.

Behaviour and impact

This section looks at how visitors are responding to Hub museums, what they do whilst they are visiting and the outcomes of a visit.

Measuring visitors against PSA targets

This section compares current data on the profile of visitors and numbers of visits with the targets set for PSA2 and the implications for audience development.

Size of potential market

Here we look at the catchment area for each museum and we estimate the size of the potential market of visitors using secondary data.

Perceptions of non attenders

This section explores the attitudes and perceptions of potential attenders towards the Hub museums, examining the nature of the proposition and reactions to the offer.

Who might visit, why and how do we reach them?

This section examines who the potential attenders are, what deters them and considers the implications for audience development strategies.

Conclusions

This section summarises the analysis of the research data and how this impacts on the objectives of the Hub. Recommendations focus on what is needed to develop audiences in line with meeting PSA targets.

3 Methodology

This section summarises the primary research methodologies that have been, and will be employed to meet the objectives of this two year-programme of research.

- Benchmarking Survey (January to March 2005)
- KPI survey (April 2005 to March 2006)
- Focus Groups (March 2005)

3.1 Benchmarking Survey

The Hub partners are starting out with a patchy and inconsistent level of knowledge on their current visitors. For example whilst Manchester Art Gallery has extensive data on its visitors, Manchester Museum has not carried out any recent visitor surveys.

The benchmarking survey was developed to bridge this gap in visitor knowledge amongst the Hub venues by providing a detailed and consistent profile and understanding of current visitors at the six core Hub venues, together with the People's History Museum. By using consistent methodology and definitions, we can make direct comparisons between each of the Hub venues.

The benchmarking survey consisted of an in-depth exit questionnaire carried at each of the Hub venues and the People's History Museum. The benchmarking research was conducted between Tuesday 4 January and Thursday 31 March 2005. A total of 1,222 interviews were carried out in this first quarter of 2005, the total at each venue is detailed in the table below:

Table 1 – Sample size for Hub venues

Venue	Sample Size (n)
Manchester Art Gallery	219
Whitworth Art Gallery	202
Manchester Museum	205
People's History Museum	101
Bolton Museum & Art Gallery	172
Harris Museum & Art Gallery	163
Tullie House Museum & Art Gallery	160

The surveys were carried out on different days of the week, at weekdays and weekends, and at different times of day; the final data set was weighted to ensure that the survey was representative of visitor flow at the venues.

The survey focused on:

- Who visits
- Why people visit
- What visitors do during their visit
- What impact does the visit have

3.2 KPI Survey

A further priority of this project is the production of robust and reliable data for funders. These reporting requirements are fixed and specific and the data collected over the duration of this project is designed to meet these exact requirements.

The benchmarking surveys already conducted in January-March 2005 will feed into the KPI surveys, so that in total, data will be collected at each venue over a period of 15 months. By collecting data over this period we will be able to measure performance quarter by quarter throughout 2005, over a complete calendar year and will also be able to make comparisons between January-March 2005 and the same period in 2006, thereby establishing a basis for monitoring year-on-year trends.

Following on from the benchmarking survey, the KPI survey will be carried out over four successive quarters between April 2005 and March 2006. The breakdown of sampling periods and sample sizes at each venue is detailed in the table below:

Table 2 – Sampling period

Sampling Period	KPI Surveys
Jan-Mar 2005	200
Apr-June 2005	200
July-Sept 2005	200
Oct-Dec 2005	200
Jan-March 2006	200
Total	1,000

3.3 Focus Groups

The project brief identified the need for primary qualitative research to explore the needs, motivations, attitudes and behaviours of target groups of non-visitors. For the purpose of the qualitative research, the following groups were identified as being targets:

- C2DE
- Families
- Ethnic Minorities
- Disabled

C2DE

Existing research has identified social class as one of the key variables that determine arts consumption. This 'demographic definer' was used as the main basis on which we recruited respondents for the focus groups.

Families

Based on our experience within the sector, and our understanding of visitor behaviour, we identified that the needs of families and independent adults are very different and should be explored separately. This was therefore one of the key criteria used to split the groups.

Ethnic Minorities

Previous studies by a range of organisations, as well as studies carried out by ourselves, have identified barriers that exist for ethnic minorities accessing museums and galleries.

A key finding from an Arts Council England audit of arts consumption found that 'ethnic minorities' as a user group did not all face the same barriers to attendance and that social class is a critical factor in determining whether or not they attend museums and galleries. Based on this understanding, within the process of recruiting the groups, we ensured that respondents were representative of the ethnic make-up of the local catchment area.

Disabled non-attenders

To truly address the needs of these specific attenders would require a detailed disability audit of each venue based on consultation across a full range of disabilities. We felt that deliberately including disabled attenders within a focus group, as a means of exploring their needs, would not provide an adequate or effective forum to produce meaningful information.

However, that is not to say that within the process of recruiting the groups we did not contact adults or families who face issues relating to physical access of the buildings, facilities and collections, but that these potential visitors were not deliberately targeted or over-represented within the groups.

Approach

Achieving meaningful findings from the breadth of attenders and venues required could only be achieved by facilitating discussions with groups of non-attenders who share ways of thinking, life experiences, and priorities.

In light of these important considerations and what we know already about non-attenders it was agreed that eight focus groups were moderated. The groups were split into C2DE families and C2DE independent adults, each containing a representative cross section of this population in terms of their ethnic background.

Groups were recruited by MRS qualified and accredited recruiters and moderated by the lead consultant. The groups each lasted 1.5 hours and each pair of groups took place at venues in the following locations and full transcripts from the groups are provided in the appendices:

- Manchester (1 family group / 1 adult group)
- Bolton (1 family group / 1 adult group)
- Preston (1 family group / 1 adult group)
- Carlise (1 family group / 1 adult group)

The qualitative research explored people's perceptions of and attitudes towards visiting the following eight partner venues:

- Manchester: Manchester City Galleries, Manchester Museum, Whitworth Art Gallery, People's History Museum
- Bolton: Bolton Museum and Art Gallery
- Preston: Harris Museum and Art Gallery, Preston,
- Carlisle: Tullie House Museum and Art Gallery

4 Who is visiting now?

4.1 Demographics

In reporting on, and comparing the demographic profile of Hub visitors at different venues we will also compare the profiles against those of current museum and gallery attenders in the North West and in England as a whole. In addition, we also include data on the local population profiles to measure the success of the venues in attracting different segments of the population.

Table 3 – Gender profile

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG	NW	ENG
Male	47	41	47	42	51	54	42	48	49
Female	53	59	53	58	49	46	58	52	51

There is considerable variation in the split of male to female visitors at the Hub venues. The gender split in the population as a whole and amongst museum and gallery visitors generally, regionally and nationally, shows that there are marginally more women than men in the audience.

The nature of the permanent collections or the temporary exhibitions showing during the interviewing period may have had some impact on the gender profile e.g. the Must Have Toys exhibition at Tullie House probably accounts for the high proportion of women visitors. Similarly, the Fantasy Architecture exhibition at Harris appears to have had a greater appeal to men.

Table 4 – Age profile

Age	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG	NW1	ENG1
15-19	4	8	4	3	6	7	6	7	7
20-24	11	24	23	18	8	14	9	3	6
25-34	21	13	20	15	17	14	9	20	18
35-44	14	15	23	23	19	19	25	22	24
45-54	17	19	17	15	14	18	25	20	18
55-64	19	13	7	11	23	14	15	13	13
65+	14	8	6	15	13	13	11	16	14

Manchester Museum and the Whitworth Art Gallery are succeeding in attracting younger visitors, particularly those aged 20-24. This is not surprising, given their locations on the campus at Manchester University. Overall, Manchester Museum has the youngest age profile of the Hub venues, its visitors being mostly students and 25-44 year olds.

Visitors to Manchester Art Gallery and Bolton have the oldest profile, a third of visitors at these venues are 55 or over. Tullie also has relatively few visitors under 35s, but most of its audience is concentrated in the 35-54 age bands.

Table 5 – Comparison of relative sizes and age profile in the local population

	Manchester LA	Bolton LA	Preston LA	Carlisle LA
15+ Pop (000s)	315	208	104	83
15-19	9	8	9	7
20-24	14	7	10	6
25-34	21	18	18	14
35-44	16	18	18	18
45-54	13	17	15	17
55-64	10	14	12	13
65+	17	18	18	22

If we compare the relative sizes and age profile in the local populations, Manchester has by far the greatest numbers of young people in its population.

As noted in the section on PSA targets, informal visits to a venue by children aged 0-16, though not contributing to the PSA1 target, is reported to MLA, and may give some indication of the venue's perceived 'family friendliness'.

Table 6 – Number of informal visits by children aged 0-16

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
0-16 visitors (%)	8	12	30	14	23	18	23
Visiting in a group	57	54	74	65	67	42	58
% Family Groups	6	3	21	4	15	4	10

Manchester Museum has the greatest family appeal amongst the Hub venues. Two of the three museum and gallery venues (Tullie and Bolton) are also attracting a high proportion of family groups.

The two demographic groups, identified by MLA as priorities in increasing access to, and broadening the profile of museums and galleries are C2DE visitors and visitors from black and minority ethnic groups (BMEs). How then are the Hub venues performing in terms of their socio-economic and ethnic profiles?

Table 7 – Hub venue socio-demographic split

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG	NW	Eng
AB	42	33	26	27	27	34	30	35	39
C1	47	53	46	59	32	41	40	33	31
C2	8	8	18	7	21	16	6	16	16
DE	3	7	10	7	20	9	23	17	14

Table 8 – Local authority socio-demographic split

	Manchester LA	Bolton LA	Preston LA	Carlisle LA
ABC1	43	47	48	44
C2DE	57	53	52	56

The local authority museum and gallery venues outside Manchester (Bolton, Harris and Tullie) appear to be more successful in attracting C2DE visitors than the Manchester based venues (with the exception of Manchester Museum). Tullie in particular is succeeding drawing in Ds and Es but Bolton is by far the most successful venue in terms of reflecting the overall social grade profile of its local population.

Table 9 - Hub venue ethnicity split

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
White British	84	83	76	78	88	92	94
White Other	8	9	6	12	3	4	3
Black	1	1	2	1	0	0	0
Asian British	0	2	4	3	3	0	0
Indian	0	0	4	1	3	0	0
Pakistani	0	0	0	0	0	0	0
Bangladeshi	0	0	1	0	0	0	0
Chinese	1	1	3	1	0	0	0
Irish	2	2	2	1	0	0	1
Other	3	3	2	3	2	2	2

Table 10 - Local authority ethnicity split

	Manchester LA	Bolton LA	Preston LA	Carlisle LA
White	75	87	83	98
Non-White British	25	13	17	2

Manchester has the most ethnically diverse population of the four Hub localities and the Manchester venues have the highest proportions of non-white British visitors. Manchester Museum in particular is succeeding in drawing in Black, Asian and Chinese visitors. Bolton is also performing reasonably well in terms of drawing in Asian visitors.

Though disabled visitors are not currently included as a target group in PSA2, they will form part of this target during 2006-08. The proportion of disabled visitors shows little variation between the venues, making up between 3-8% of visitors.

Table 11 – Number of disabled visitors

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Disabled	4	3	7	6	8	8	8

The employment status profile of visitors is defined to a great extent by the age profile. All the Manchester venues are attracting the student population, as are the Harris and Tullie House. Bolton is the only venue not drawing in high proportions of students, despite its proximity to Bolton University, which has 8,000 registered students. 38% of visitors at Bolton are retired, unemployed or looking after the home.

Table 12 – Employment profile of visitors

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Employed full-time	46	40	43	38	38	35	43
Employed part-time	6	9	12	16	10	12	14
Self employed	10	6	4	3	3	5	6
Studying	13	24	22	19	5	19	13
Retired	21	14	10	19	27	21	18
Unemployed	1	2	3	2	7	4	2
Not eligible for employment	0	1	1	1	1	-	1
Looking after home	3	2	3	2	3	1	3
Refusal	-	2	-	1	5	2	1

People working in the arts and cultural industries are most likely to be found amongst visitors to the Whitworth. About 30% of visitors at all the Hub venues work in the health, social services or education sectors. This figure is typical of performing and visual arts audiences, the audience traditionally being drawn from these 'caring' professions. The People's History Museum has a much higher proportion of local government workers and civil servants amongst its visitors.

Table 13 – Visitors by employment sectors

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Arts/cultural	14	26	6	15	2	19	14
Creative/comms/media	7	5	5	0	4	1	6
Health	10	10	10	5	9	6	8
Education	19	16	20	20	14	13	14
Social Services	2	0	2	4	3	4	4
Local govt/civil service	8	2	5	15	8	7	3
Manufac/construction/eng.	9	5	11	9	15	14	13
Legal/financial	6	5	13	3	7	6	3
Other							

The two Manchester art galleries have the highest proportions of visual arts vocationals or specialists amongst their visitors, although Harris and Tullie House are attracting this segment.

Table 14 – Number of visual arts vocational and specialist

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Visual art:							
Specialist	20	22			11	14	15
General	62	58			72	52	73
Little or no knowledge	18	19			16	34	12
Museums:							
Specialist			8	20	10	15	10
General			73	69	75	50	82
Little or no knowledge			19	10	15	34	8
Visual art vocational	22	29	3	7	6	17	19
Museum vocational	3	3	7	17	8	3	5

The local authority museums and galleries outside Manchester, have a much more local audience than the Manchester venues; two third of visitors are people who live in Bolton, Preston or Carlisle. Bolton and the Harris have very few visitors coming from outside the region, although Tullie House is attracting more than 20% of its visitors from outside the North West.

In Manchester, all the venues are succeeding in drawing visitors from the other local authorities within the AGMA region, with the exception of Wigan. Both galleries are attracting national and international visitors, and though its audience is smaller, the People's History Museum has the greatest proportion of visitors from outside the region.

Table 15 – Origin of visitors

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Bolton	2	2	3	5	61	-	4
Bury	5	3	4	4	5	-	-
Manchester	26	35	35	12	2	-	1
Oldham	2	3	1	5	-	-	-
Rochdale	2	-	2	2	1	-	1
Salford	2	3	4	7	5	-	-
Stockport	9	6	8	8	1	-	-
Tameside	3	2	7	6	-	-	-
Trafford	5	8	6	7	-	-	-
Wigan	-	-	-	-	7	-	1
Carlisle (CA)	-	1	-	-	-	1	64
Lancaster (LA)	2	1	-	1	-	9	3
Preston (PR)	1	-	3	-	4	63	1
Blackpool (FY)	1	-	2	-	1	9	1
Blackburn (BB)	3	-	1	-	2	8	1
Other North West	11	11	11	7	2	3	2
Rest of UK	20	15	8	24	6	6	18
Overseas	6	8	5	12	3	1	4

MLA defines a *true new user* as not having visited any museum or gallery in the past 12 months. In areas where there is relatively low provision, acquiring true new users may be easier than it is in cities with high levels of provision, where a visitor may well not have been to a particular venue for more than 12 months but because of the greater choice, is unlikely to have ceased visiting museum and galleries altogether.

Specialist venues or venues which attract high proportions of specialist visitors are also less likely to draw in these true new users. This is borne out to some extent by the results for the venues outside Manchester; Bolton and Harris have the highest proportions of true new users amongst their visitors. The proportions of true new users at the Manchester venues are comparatively low, particularly at the People's History Museum.

Table 16 – Number of true new users

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
True new user	7	10	17	3	19	20	10
Current	54	44	29	11	52	53	57
Lapsed - recent	7	10	15	8	10	16	4
Lapsed – past	4	5	6	3	7	7	1
First time visitor	32	37	42	76	20	20	34

At the venues outside Manchester, more than half the visitors are current attenders i.e. they had visited the venue before in the past 12 months. Given that the visitors at Bolton, Harris and Tullie House are mostly local people, this suggests that these venues have built up a core of frequent local visitors.

Tullie in particular has a market that is split between current attenders and first time visitors, only 5% of its visitors have been re-activated i.e. had been at some time in the past and been persuaded to attend again. Bolton and Harris have a much higher proportion of re-activated attenders than Tullie House, and have twice as many true new users amongst their visitors.

At the Manchester venues, both galleries have a high proportion of current attenders, even though their visitors are not as local as at the Preston, Carlisle and Bolton venues. Manchester Art Gallery and the Whitworth venues have built up their core audience from within Greater Manchester rather than just Manchester itself.

At the museums in Manchester on the other hand, the proportion of current attenders is very much lower. At the People's History Museum, this may be partly because its audience is more geographically dispersed, it may also be due its location – people are unlikely to just 'pop-in' – this is borne out by the fact that 74% of visitors are making a specific, intentional visit to the venue.

4.2 Risk Profile

A useful way of thinking about what characterises visual arts attenders in particular is to consider how receptive they are to innovation and taking risks. For example, contemporary arts attenders have a similar profile to those groups known in marketing as innovators, early adopters or inner directed. Exploring the characteristics of these groups can help clarify what makes certain people attend galleries, and suggest ways of encouraging a wider range of visitors.

Risk Takers are those who are naturally open to innovation, including artists and creative people, who can make up their own minds about what they want to see and participate in. They tend to set trends and pass around and rely upon word of mouth recommendation. Their enthusiasm can push a new exhibition or artist into wider markets.

Cautious Gamblers need a certain degree of endorsement before they feel happy to participate in something. This would take the form of media reviews or widespread media attention, popular word-of-mouth recommendation. This group is open to new experiences but needs reassurance in order to minimise the risk they are willing to take with something.

Safety Firsts prefer to stick with things they feel sure of, that reflect their own value systems and provide them with a feeling of security and reassurance. This group can be very conservative or reactionary and are especially vociferous in their opinions on contemporary art.

Research suggests there is scope for galleries to increase their audiences by extending their appeal to people lying within the Cautious Gambler and Safety First groups. Thinking in terms of levels of confidence and what people need to feel more confident about visiting galleries is an effective way to begin building new audiences.

From the results of the benchmarking, in terms of their openness to risk taking with visual art, visitors at Bolton and Harris are relatively conservative. Risk takers are more likely to be found amongst the Whitworth visitors and, together with Manchester Art Gallery and Tullie House, these have some scope to develop the Safety First market.

Table 17 – Risk takers

Risk taking: visual art	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Risk taker	37	43	-	-	17	25	36
Cautious gambler	42	36	-	-	49	39	50
Safety first	20	22	-	-	34	35	14

5 Why are people visiting?

People are prompted to visit museums and galleries through the different marketing channels that capture their attention and motivated by a range of different needs.

We measured whether visitors to the Hub venues were intentional (visit was planned before they left home) or incidental (visit was made spontaneously). This data provides context for the visit - intentional visitors arrive with a considered agenda and have allotted sufficient time for their visit. They are more likely to achieve deeper levels of engagement and higher levels of meaning making.

Conversely, incidental visitors tend to spend less time in a venue, are less aware of what there is to see and do. They also tend to be less experienced, less knowledgeable and less confident visitors. For incidental visitors in a hurry, museums and galleries need to be able to frame their visit and give it direction and purpose. This means that the welcome and orientation phase of the visit is crucial and that the interpretation needs to quickly engage them.

Table 18 – Number of intentional and incidental visitors

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Intentional	68	60	72	74	60	52	73
Incidental	32	40	28	26	40	48	27

Most visitors at the Hub venues are intentional, although Bolton, Harris and the Whitworth were approaching a 50:50 split. At Bolton and at Harris, the high level of incidental visiting may be tied in to the fact that their audiences are mostly local, visitors may be working in Bolton and Preston or coming in to the town centres to shop and just 'popping-in' to the museum or gallery.

Incidental visitors tend to be less aware of the venue's publicity, they may be visiting more out of habit rather than being prompted by marketing or publicity – half the visitors at Bolton weren't aware of any marketing material.

The different marketing budgets available to each of the Hub venues probably contribute greatly to the differing results observed when looking at visitors' use and awareness of different publicity.

For Manchester Art Gallery national press coverage is quite effective in communicating with visitors; at Bolton, Harris and Tullie House the emphasis is clearly more focused on local press. Whilst a high proportion of visitors at all the venues have access to the Internet, only about 10% use the venues' websites as an information source. This may be because people still prefer to use 'traditional' publicity material but may also be a reflection of the 'usefulness' of some websites, particularly in the case of the Harris.

Table 19 – Number of visitors using the website

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Internet access - yes	78	82	79	75	61	81	74
Internet access - no	22	18	21	25	39	19	26

At the Manchester venues, word of mouth recommendation is one of the main ways that people are finding out what's on. From the benchmarking survey, mailing list activity (private view invitation, leaflets sent out in the post) is most effective at Tullie House.

Table 20 – How people find out what is on?

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Boards outside building	22	31	28	17	7	20	32
Banners outside building	22	26	22	11	8	15	28
Posters	7	6	8	1	5	12	12
Piece in national press	14	3	2	4	3	8	6
Piece in local press	11	6	5	2	12	12	20
Exhibition listing	4	3	1	1	-	2	2
Private view invitation	2	1	-	-	-	2	3
Mention on radio	2	-	2	-	-	2	6
Mention on TV	6	-	6	-	1	-	2
Venue website	7	6	4	5	2	1	4
Other websites	2	3	3	7	-	1	6
Venue leaflet in post	3	6	4	5	3	5	14
Venue leaflet picked up	12	10	8	31	7	18	23
Word of mouth	17	19	19	13	11	10	6
Other	19	6	2	15	5	9	28
None of these	30	34	37	24	51	36	8

5.1 Awareness of other venues

The results of the benchmarking survey suggest that there is no Hub-wide awareness i.e. awareness of Bolton, Harris and particularly Tullie House was relatively low at all the Manchester venues. In Bolton and Preston, levels of awareness of the Manchester venues, (with the exception of the People's History Museum) was very similar and still relatively high, showing also that Manchester Art Gallery has the highest profile in the region.

At Tullie House however, less than half the visitors had heard of the Manchester venues and even fewer (9-19%) were aware of the Harris and Bolton. Whilst this geographic decay in awareness is not unexpected, any joint initiatives would first require awareness raising campaign.

Table 21 – Awareness of other venues

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Venue aware of:							
Manchester Art Gallery	100	88	87	90	79	81	47
Manchester Museum	84	90	100	72	59	60	46
Whitworth Art Gallery	86	100	78	72	62	58	39
People's History Museum	60	57	46	100	38	30	31
MSIM	82	80	82	90	77	80	41
Harris Museum and Art Gallery	24	21	14	15	34	100	9
Bolton Museum and Art Gallery	36	30	30	37	100	34	19
Tullie House Museum and Art Gallery	16	19	10	14	13	24	100
Museum of Lancashire	17	15	10	15	24	60	23
None of these	4	3	3	6	7	6	33

Table 22 – Number of visitors attending other venues in past 12 months

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Attended in past 12 months:							
Manchester Art Gallery	-	47	29	38	22	23	5
Manchester Museum	33	37	-	29	12	10	4
Whitworth Art Gallery	30	-	23	22	12	15	5
People's History Museum	15	8	11	-	3	4	3
MSIM	26	25	29	40	19	13	7
Harris Museum and Art Gallery	3	5	2	1	5	-	1
Bolton Museum and Art Gallery	6	4	5	11	-	6	3
Tullie House Museum and Art Gallery	4	2	-	-	1	2	-
Museum of Lancashire	2	2	-	2	3	13	3
None of these	40	43	30	32	58	58	83
ANY HUB OR FIRST PARTNER VENUE	60	57	70	68	42	42	17

In terms of current attendance, the table shows high levels of crossover amongst visitors at the Manchester venue. For example, 57% of the visitors at the Whitworth had been to at least one other Hub or First Partner venue in the past 12 months. In fact, 47% of visitors at the Whitworth had been to Manchester Art Gallery, in other words the Whitworth is sharing half its audience with Manchester Art Gallery.

Manchester Museum and the People's History are also sharing their audience with other Manchester venues. The data is suggesting that the venues in Manchester are sharing a common museum and gallery market, rather than acquiring their own discrete audience. This means that true new users may be harder to find for the Manchester venues.

At Tullie House however, only 17% of visitors have been to any other Hub venues. Despite this only 10% of visitors at Tullie House were true new users; Tullie's audience is more likely to be attending non-Hub venues either elsewhere in the region, or nationally, given that 18% of its visitors live outside the North West.

5.2 Motivation

Based on extensive research, Morris Hargreaves McIntyre has identified the range of motivations that people have for visiting museums and galleries. This model is a useful way of segmenting visitors by their principal motivation, i.e. by the needs they are satisfying by visiting.

The motives listed in this Hierarchy have been defined from dozens of focus groups in which visitors reported, articulated and discussed the benefits they were seeking from a visit to a museum or gallery.

The classifications have then been grouped into four key drivers: Social, Intellectual, Emotional and Spiritual:

Spiritual = Church

Visitors are looking for creative stimulation, quiet contemplation and see museums as an opportunity to escape and recharge their batteries, this is generally a small proportion of visitors

Emotional = Spa

Visitors want to experience what the past was like, or they may have a personal connection to the subject matter. They want to see fascinating and beautiful objects in an inspiring setting

Intellectual = Archive

Visitors are keen to encourage their children's or their own interest and knowledge. They may have a professional/academic/personal interest in the subject

Social = Attraction

Visitors see the Museum as an enjoyable place to spend time with friends and family

These drivers are hierarchical. In moving up the hierarchy visitors experience increasing levels of engagement with the museum or gallery and the objects on display. The further up the hierarchy visitors move, the more fulfilling and rewarding their visit. At each point on the hierarchy visitors have different needs; they are only able to move up the hierarchy if their needs at the lower ends are met.

Current attenders know that a visit to a museum or gallery will fulfil their needs. Their primary motivation may be any of the four drivers on the Hierarchy of Motivation, depending on their degree of engagement with the museum or gallery.

The following quotes used to illustrate the four primary motivations for visiting museums and galleries have been taken from qualitative research carried out by Morris Hargreaves McIntyre with current attenders at UK venues.

Social needs

At the bottom of the Hierarchy of Motivation are visitors driven primarily by Social needs. These visitors seek a pleasant day out with friends and family or an activity to do while on holiday. They engage with the museum or gallery as an attraction and want venues to provide for a sociable experience:

> *'An interesting day out with something to do for all the family'*
>
> *'It's one of the major attractions in Manchester'*

In order to achieve this the venue must make them feel comfortable, provide ease of access and movement, clear orientation, good facilities, services to meet diverse needs and, for families, a child friendly environment.

Intellectual needs

Visitors driven by Intellectual needs view the museum or gallery as a resource, a place to deepen their own or their children's knowledge. They engage with the museum or gallery as an archive and look to venues to provide for a learning experience.

> *'I have an academic interest in the subject'*
>
> *'To understand my roots'*
>
> *'I am trying to wake the children up to look at things'*

In order to fulfil Intellectual needs the museum or gallery must provide for critical engagement, depth and focus on areas of study, journeys of discovery and information in a variety of formats, to meet diverse needs, from families to academics.

Emotional needs

Emotionally driven visitors are looking for a moving experience. They engage with the museum or gallery almost as a spa, a place to indulge the senses and connect with objects or exhibits at a deep level. These visitors look to the museum or gallery to provide an environment that heightens their emotions.

> *'I come to see my favourite works'*
>
> *'I am looking for the human story'*
>
> *'To stand and stop in awe at an Old Master'*
>
> *'It is part of our heritage'*

To fulfil the needs of these visitors the museum or gallery must control the ambience, provide for deep sensory and intellectual engagement and offer a feast for the eyes.

Spiritual needs

A small proportion of visitors are driven by spiritual needs. They know that their social, intellectual and emotional needs will be met and are looking for an almost transcendental experience; food for the soul. They engage with the museum or gallery at a very high level and see the visiting experience as relaxing and inspiring, an opportunity to escape from everyday life and immerse themselves in the collections and environment.

> *'It is a therapeutic thing to do ... I find it calming and thought provoking'*
>
> *'I like to immerse oneself in the pictures and forget about everything for a while'*
>
> *'To stimulate my own creativity'*

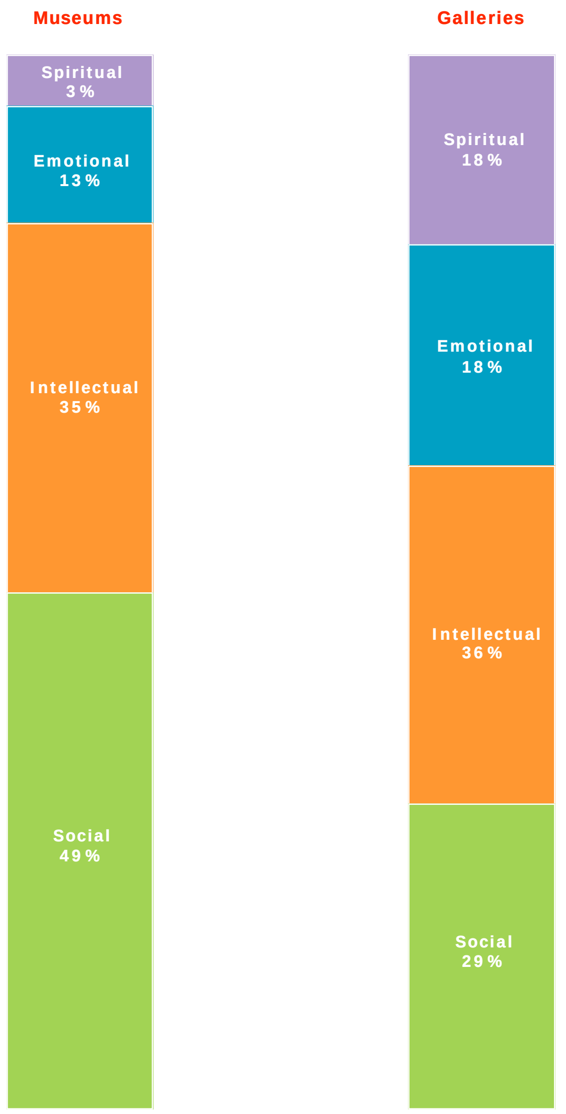
To meet the needs of these visitors the venue must provide for a contemplative ambience and quality engagement with objects.

Although this Hierarchy has been meticulously assembled from empirical evidence, the model has striking parallels with Maslow's Hierarchy of Human Needs. We have therefore mapped Maslow's categories onto our Hierarchy to show how the two models relate to each other.

5.3 Hierarchy of Visitor Engagement

<table>
<tr><th colspan="2">Morris Hargreaves McIntyre's Hierarchy of Visitor Engagement</th><th colspan="2">Maslow's Hierarchy of Human Needs</th></tr>
<tr><td rowspan="3">Spiritual</td><td>Escapism</td><td colspan="2" rowspan="3">Self-actualisation</td></tr>
<tr><td>Contemplation</td></tr>
<tr><td>Stimulate creativity</td></tr>
<tr><td rowspan="8">Emotional</td><td>Aesthetic pleasure</td><td colspan="2" rowspan="2">Aesthetic</td></tr>
<tr><td>Awe and wonder</td></tr>
<tr><td>Moving</td><td rowspan="10">Cognitive</td><td rowspan="10">Esteem</td></tr>
<tr><td>Personal relevance</td></tr>
<tr><td>Experience the past</td></tr>
<tr><td>Nostalgia</td></tr>
<tr><td>Insight</td></tr>
<tr><td>Sense of cultural identity</td></tr>
<tr><td rowspan="4">Intellectual</td><td>Acad/prof interest</td></tr>
<tr><td>Hobby interest</td></tr>
<tr><td>Self-improvement</td></tr>
<tr><td>Stimulate children</td></tr>
<tr><td rowspan="6">Social</td><td>Social interaction</td><td colspan="2" rowspan="5">Social</td></tr>
<tr><td>Entertainment</td></tr>
<tr><td>To see, to do</td></tr>
<tr><td>Inclusion, welcome</td></tr>
<tr><td>Access</td></tr>
<tr><td>Comfort, security, warmth</td><td>Safety</td><td>Physiological</td></tr>
</table>

Morris Hargreaves McIntyre have profiled museum and gallery visitors according to their motivation at a number of different venues, enabling us to generate motivation 'norms' for museums and galleries.



So how do these compare with motivations for visitors at the Hubs venues?

Table 23 – Number of visitors in the Hub venues by motivation

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Social	45	44	42	40	44	47	43
Intellectual	34	36	51	58	38	35	31
Emotional	12	9	4	2	11	9	13
Spiritual	8	11	3	0	7	9	13

The main motivation at the two galleries in Manchester and at the three museum and gallery venues is social. All five motivation profiles are in fact very typical of the MHM norm for museums, although this is not unsurprising at Harris, Bolton and Tullie House, there are fewer emotionally and spiritually driven visitors at Manchester Art Gallery and the Whitworth than would be predicted from the MHM norms.

At the museums, the dominant motivation is intellectual but whilst at Manchester Museum this is mostly due to parents wanting to encourage their children to learn more and take an interest in the world around them, at the People's History Museum visitors are driven more by the their own desire for self-improvement.

6 Behaviour and impact

Though not necessarily a direct measure of either visitor satisfaction, how much there is to see and do, or depth of engagement, visit duration does serve as an indicator of the 'stickiness' of a venue. Manchester Museum and Tullie House have the highest proportion of visitors staying for more than two hours. As Tullie House charges admission for entry, visitors may be staying longer because they have paid.

Table 24 – Length of visit

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Less than 15 mins	3	6	5	34	8	10	9
15-29 mins	10	19	5	8	18	37	15
30-59 mins	27	39	22	36	35	34	17
1hr – 1 hr 30 mins	34	23	31	30	29	14	22
1 hr 31 mins – 2 hrs	12	7	16	10	6	3	17
More than 2 hours	15	7	21	11	3	2	21
Average visit duration (mins)	75	57	83	68	53	40	74

Visitors to Bolton, Harris and the Whitworth tend to have shorter visit duration than the other venues, these are also the venues with the highest proportion of incidental visitors. At the Harris, the shorter stay was also probably due to the limitations on what there was to see immediately after re-opening.

Visitors are mainly coming to the Hub venues to see the collections rather than the temporary exhibitions; in most cases a third of visitors were exhibition driven whilst twice as many visitors (57-61%) came to see the permanent collections. The only exception to this pattern was the People's History Museum where 81% visitors were coming mainly to see the collection.

This pattern may shift if any venues host major temporary exhibitions, for example, during the Turner exhibition, 73% of visitors at Manchester Art Gallery were exhibition driven.

Table 25 – Length of visit during a temporary exhibition

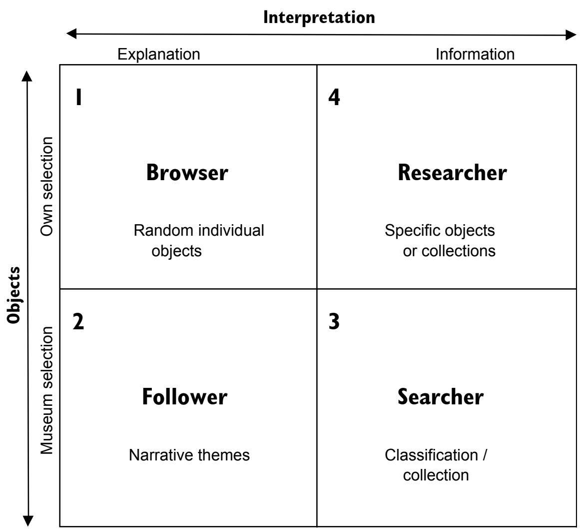
	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
See specific exhibition or gallery	41	35	44	17	34	40	47
General visit to see collection	78	78	79	92	80	64	66
Attend a talk, tour or special event	2	-	1	4	2	3	1
Visit the cafe	21	17	20	2	2	4	22
Visit the shop	27	30	18	10	6	3	17
Meet friends	6	7	4	2	4	2	7
Attend business meeting	1	1	2	-	2	1	1
Look at building	5	4	2	5	3	2	5
Other	3	2	1	-	1	4	5

The café and the shop are visited by around 20-30% of visitors at Manchester Art Gallery, the Whitworth, Manchester Museum and Tullie House,

6.1 Meaning Making

The behaviour of visitors at a museum or gallery can be segmented into four modes of meaning making. The model below defines them in terms of how objects are selected and what type of interpretation they require.

Hierarchy of Meaning Making



We can further describe each of the modes:

Browsers

- Select objects themselves by browsing the exhibition, they will wander until they find a 'gateway' object that catches their attention
- Require an explanation of their selected object to be able to make meaning
- Can be moved into the Follower stage by encouragement to follow explanation on to other related objects

Followers

- Want the museum to select objects that illustrate themes or topics to follow
- Require a narrative explanation of themes to be able to make meaning
- Can be moved into the Searcher stage by encouragement and scope to follow personal interests, this may then lead them to searching for related objects

Searchers

- Already have a good general understanding, or intellectual grasp of the topic - they want to consume all the information available in the museum / exhibition on that subject
- Rely on the museum to select and present objects that fit into their field of interest
- Can be moved onto the Researcher stage by direction to further sources of information

Researchers

- Are focused, specialist museum visitors. They select objects themselves based on their in-depth knowledge of the subject
- Want access to expert information - a specialist curator or scholarly work on specific objects or collections

We have arranged these modes into a clear Hierarchy, with Browsers at the bottom, making the least meaning, then Followers, Searchers and finally, Researchers making the most meaning.

Each of the visitor types identified make meaning from objects in different ways, consequently they have different requirements in terms of the selection, display and interpretation of objects within an exhibition. Browsers and Followers lack contextual knowledge and so require explanation, ideally delivered in a rich sensory format. Searchers and Researchers have a level of pre-existing knowledge or intellectual curiosity and so bring their own context to the interaction. Their principal need is for easy access to detailed information.

Many visitors enjoy a passive or reactive visiting experience, for them to have been to the museum and to have seen objects is a satisfactory experience in itself. However, the more proactive the museum can make visitors and the deeper the level of engagement they can facilitate, the more fulfilled visitors become through their visit.

Visitors who are continually browsing an exhibition can only making fleeting connections with a limited number of objects. Followers make connections with a number of related objects and leave with an understanding of key themes. Like Browsers the dominant mode is one of passive consumption. Searchers are interested in whole exhibitions, they either enter in this mode or are encouraged to develop this behaviour as they latch on to successful interpretation. Researching behaviour tends to be developed over a long period of time; these visitors have specific and focused areas of interest. Both Searchers and Researchers expect to be proactive in their behaviour.

If a museum or gallery is committed to developing visitors' levels of engagement it should seek to encourage visitors to develop their meaning making skills by selecting objects and offering interpretation that propels visitors up the Hierarchy and engages them proactively.

The Map of Visitor Needs below describes the needs of each mode in terms of the context (why they engage), the content (what they engage with) and the experience (how they engage).

Map of visitor needs

	REACTIVE		PROACTIVE	
	Browser	Follower	Searcher	Researcher
Context Why they engage	Awe and wonder: Visually arresting Famous Intrinsic appeal	Points of engagement and connection Promised experiences or outcomes Themes and narratives	Need to be able to locate objects of interest Signposts to contextual information if required	As Searcher plus: Ability to search for particular items Detailed provenance Links to academic sources of information, publications Location of related collections
Content What they engage with	Just enough objects to look at Headline information to catch attention	Enough objects to constitute themes (some objects could repeat) Enough information to develop themes	All objects in the collection Enough information to identify and distinguish objects of interest Clear description and explanation	As Searcher plus: Links to similar collections Authoritative, scholarly commentary Physical / technical data
Experience How they engage	Impact on the senses Involving - interactives	Mis of media to involve in themes: Lo-tech, eg. Information sheets Hi-tech, eg. Audio, video, £D graphics, animation, zoom	User friendly way of accessing information Glossary or key to jargon and codes Pictures Information to take away	Functional, uncluttered way of accessing information Pictures Information to take away

But this is not simply a model. It is also a practical tool that produces a meaningful measure.

The benchmarking survey profiled the visitors to the Hub venues in terms of these four modes of meaning making. The profile for the People's History Museum is consistent with intellectually motivated, intentional visitors, highly interested in labour history seeking to absorb as much information as they can. At Tullie House, where the audience is much more local and more familiar with the venue and so probably less likely to just browse, rather they may be coming to seek favourite exhibits or galleries.

Table 26 – Number of visitors at the Hub venues by meaning making modes

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Browser	32	42	30	19	32	21	21
Follower	11	11	14	16	13	10	7
Searcher	23	21	28	51	31	34	48
Researcher	33	26	28	13	25	35	24

In terms of measuring the impact of a visit, we can monitor the progress of visitors on the meaning making 'ladder' or hierarchy.

Table 27 – Progress of visitors on the meaning making hierarchy

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Browser =	84	90	77	75	97	83	87
Browser +	16	10	23	25	3	17	13
Follower =	83	77	67	65	93	76	82
Follower +	17	23	33	35	7	24	18
Searcher =	88	93	96	94	100	100	97
Searcher +	12	7	4	6	0	0	3
Researcher =	100	100	100	100	100	100	100

The results suggest that the Hub museums are slightly more successful in engaging visitors and moving them on to a higher level than the art galleries. At Manchester Museum for example, 23% of those who enter as Browsers achieve a higher level of Meaning Making, 33% of Followers also move up the ladder, similar results were achieved at the People's History Museum.

Although Browsers at Bolton may have enjoyed their visit and report quite high levels of satisfaction in an exit survey, the results suggest they have not really connected with the objects on display as only 3% moved on from this mode. Due to the small sample sizes the results quoted here are indicative and not statistically valid, but as the sample builds through the KPI surveys, this impact measurement will become more robust.

As well as measuring the impact on visitors in terms of their behaviour during a visit, the benchmarking survey also measured their satisfaction levels and likelihood to re-visit the venue. Again as the sample sizes grow and allow for more cross-analysis we will be able to determine whether visitors who are static on the Meaning Making ladder are less satisfied and/or less likely to return.

Table 28 – Satisfaction with the visit

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Very satisfied	75	63	76	71	53	44	79
Quite satisfied	23	32	23	27	41	47	17
Neither satisfied nor dissatisfied	1	1	-	-	5	1	1
Not very satisfied	-	4	1	2	-	8	3
Not at all satisfied	-	-	-	-	-	-	-

Overall there don't appear to be major issues with visitor satisfaction at the Hub venues, although the ratings at Bolton and the Harris are markedly lower than elsewhere. Whilst at Harris this may in large part be due to the condition of the building during the research period, the visitor experience at Bolton does appear to fall short of that at the other venues.

Though there is some correlation between visitor satisfaction and their likelihood to return, visitors who have high satisfaction levels may not feel compelled to return simply because they feel they have got what they wanted from their visit and 'seen what there is to see'. This phenomenon is most pronounced at the People's History Museum, but may also be due to the fact that a significant proportion of its visitors came from outside the Greater Manchester area.

Table 29 – Likelihood of visitors to return

	MAG	WAG	MM	PHM	BMAG	HMAG	THMAG
Very likely	69	56	68	33	67	69	82
Quite likely	23	35	26	46	25	27	14
Not very likely	8	8	5	18	7	3	3
Not at all likely	0	1	1	3	1	1	2

7 Measuring visitors against PSA targets

7.1 PSA Targets

The allocation of PSA targets to individual Hubs for 2004-06 was based on the relative levels of Hub funding. The formula for allocating targets also took into account the Hubs' regional circumstances. The national PSA targets are set out below.

PSA 1

> *"PSA1 - to increase number of contacts between children and regional Hub museums by 25% by 2005-06"*

The increase of 25% was based on past rates of growth in the number of contacts with children; MLA regards it as ambitious enough to challenge and stimulate fundamental change, it would also make a realistic contribution to overall Government targets.

Collectively, the six Phase 2 Hubs are expected to deliver 35% of the 25% uplift[1], North West Hub has a PSA 1 Target of 38,000, to increase child contacts from 251,000 to 289,000 by 2005-06.

All PSA1 measurements relate to school visits (Template 1) and outreach activity (Template 3(ii)); informal child visits to museum and galleries are recorded on Template 6(ii) of MLA's monitoring spreadsheet but are not included in PSA1. By analysing the data from the MLA Data Collection templates, we can however monitor the contribution of each venue towards the Hubs PSA1 target.

[1] Document supplied by West Midlands Hub

Table 30 – School visits

Venue	03-04	04-05	5-16 yr olds
Manchester Art Gallery	8,544	9,484	63,152
Whitworth Art Gallery	5,386	8,095	63,152
Manchester Museum	25,022	25,973	63,152
Bolton Museum & Art Gallery	10,307	12,722	43,639
Harris Museum & Art Gallery	1,595	1,527	21,055
Tullie House Museum & Art Gallery	10,896	10,462	15,025
Total	61,750	68,263	

The table shows that there was a 10% increase in visits by school children to Hub venues in 2004-05. Manchester Museum has by far the biggest contribution to this total (38%), with Manchester Art Gallery, Whitworth Art Gallery, Bolton Museum and Art Gallery and Tullie House contributing approximately equal shares. The PSA1 target for the total number of school visits in 2004-05 was 69,917 therefore the Hub collectively achieved 97.6% of this target. By the end of 2005-06, the target for school visits is 82,352. In order to meet this target, the Hub will have to increase the number of school visits by a further 20% compared to 2004-05.

If the number of visits by school children is compared against the total population of 5-16 year olds in the Local Authority areas in which each of the venues are located, with the exception of Tullie House, there is, theoretically, a significant 'untapped' schools market for the Hub venues to develop, particularly for the Harris in Preston. However, a detailed analysis of visits by school year group shows that pupils in Years 1 to 6 account for 85% of all visits to the Hub venues and only 15% of visits are made by secondary school pupils. On this basis, a significant proportion of the 'untapped' schools market will consist of 11-16 year olds, so that the capacity for growing school visits will be determined by the venue's ability to cater for secondary school visits.

Informal visits by children

The estimated number of informal child visitors at each venue during January to March 2005 is shown in the table below.

Table 31 – Estimated number of informal child visitors

Venue	0-16 (%)	0-16 (No)
Manchester Art Gallery	9	5,922
Whitworth Art Gallery	12	2,148
Manchester Museum	30	11,930
People's History Museum	14	713
Bolton Museum & Art Gallery	23	8,621
Harris Museum & Art Gallery	18	648
Tullie House Museum & Art Gallery	23	12,074

PSA 2

PSA2 To attract an additional 500,000 visits to regional hub museums by true new users predominantly from social classes C2DE and ethnic minorities by the end of 2005-06.

A 'true new user' is someone who is making their first visit to a specific museum for 12 months and who has also not visited any other museum in the previous 12 months.

This target represents the aspiration that the profile of museum and gallery visitors should progressively reflect that of regional populations. The current ratio of ABC1 to C2DE museum visitors is approximately 2:1, whilst the ratio in the population as a whole is 1:1.

Collectively, the six Phase 2 Hubs are expected to deliver 25% of this 500,000 uplift[2]. North West Hub has a PSA 2 Target of 57,000 to increase visits from predominantly C2DE and ethnic minorities from an estimated baseline in 2003-04 of 218,000 to 275,000 by 2005-06 this represents an increase in visits of 26%.

The table below shows the socio-economic profile of the localities in which the Hub venues are sited and the proportion of C2DE visitors in their audience during the first quarter of 2005.

[2] Documents supplied by North West Hub

Table 32 - Socio-economic profile of Hub localities

Venue	Local	MORI 03	MORI 04	MHM 05
Manchester Art Gallery	57	10	15	11
Whitworth Art Gallery	57	10	10	15
Manchester Museum	57	17	29	28
Bolton Museum & Art Gallery	53	37	43	41
Harris Museum & Art Gallery	52	19	27	24
Tullie House Museum & Art Gallery	56	19	23	29

The data shows that Bolton Museum and Art Gallery is the most successful of the Hub venues in terms of attracting C2DE visitors. However, it may be that in achieving this profile, the venue has penetrated the C2DE market of attenders and intenders and there may little or no capacity to develop this market further in Bolton.

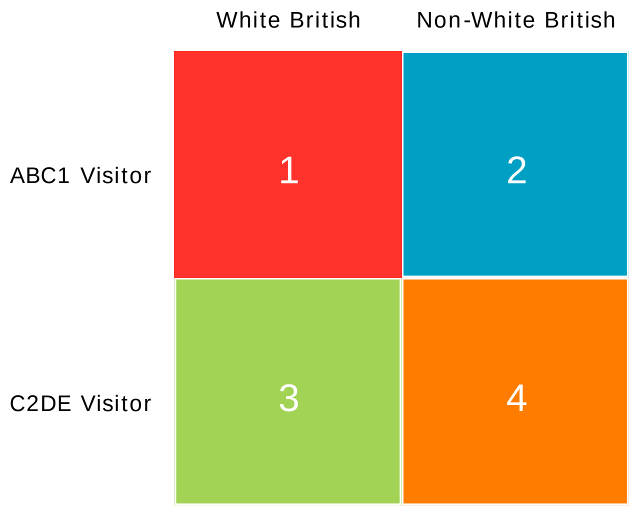
The table below shows the ethnic profile of Hub localities and the proportion of non-white British visitors in their audience during the first quarter of 2005.

Table 33 – Ethnic profile of Hub localities

<table>
<tr><th>Venue</th><th>Local</th><th>MHM 05</th><th>MORI 03</th></tr>
<tr><td>Manchester Art Gallery</td><td>25</td><td>16</td><td rowspan="6">8% for NW</td></tr>
<tr><td>Whitworth Art Gallery</td><td>25</td><td>18</td></tr>
<tr><td>Manchester Museum</td><td>25</td><td>24</td></tr>
<tr><td>Bolton Museum & Art Gallery</td><td>13</td><td>11</td></tr>
<tr><td>Harris Museum & Art Gallery</td><td>17</td><td>7</td></tr>
<tr><td>Tullie House Museum & Art Gallery</td><td>2</td><td>6</td></tr>
</table>

The data from the benchmarking survey suggests that Manchester Museum is attracting the most ethnically diverse audience, although the audience profile at most venues is approaching that of the local catchment area.

These tables report on changes in the overall socio-economic and ethnic profile of Hub venues in isolation. North West Hub's target of 57,000 true new users is in fact made up of a combination of socio-economic and ethnic groups.



True new users can originate from any one of the four segments in this model. The aim of PSA 2 is that at least 70% of true new users originate from segments 2, 3 or 4 in order to drive the change in the profile of museum and gallery visitors. PSA2 only counts UK based visitors – true new users from overseas do not contribute to venues' PSA2 targets. The number and distribution of true new users at Hub venues is shown in the table below:

Table 34 – Number and distribution of Hub venues' true new users

Venue	True new users	C2DE and/or BME	White ABC1	White C2DE	Non-white ABC1	Non-white C2DE
Manchester Art Gallery	4,039	1,131	71%	14%	14%	-
Whitworth Art Gallery	1,633	621	62%	8%	22%	8%
Manchester Museum	6,507	3,909	38%	34%	25%	3%
Bolton Museum & Art Gallery	6,304	4,224	33%	57%	10%	-
Harris Museum & Art Gallery	740	340	54%	37%	-	9%
Tullie House Museum & Art Gallery	5,204	1,353	74%	26%	-	-
Total	24,427	11,578				

During the last quarter of 2004-05, the North West Hub venues attracted 24,427 UK-based true new users, of which 11,578 (47%) were C2DEs and/or BMEs. In most cases the majority of true new users are white ABC1. In this quarter, only Manchester Museum (62%) and Bolton Museum and Art Gallery (67%) are approaching the PSA2 target for attracting 70% of true new users from MLA's target groups. In 2004-05 as a whole, the target for the Hub collectively was to attract 24,117 C2DE and/or BME true new users, 48% of this target was achieved between January and March 2005. The extent to which each venue achieved its yearly target in this period is shown in the table below:

Table 35 – Performance against PSA2 targets

Venue	True new users	C2DE and or BME	04-05 Target	Achieved in Q4
Manchester Art Gallery	4,039	1,131	5,044	22%
Whitworth Art Gallery	1,633	621	1,536	40%
Manchester Museum	6,507	3,909	3,028	129%
Bolton Museum & Art Gallery	6,304	4,224	4,840	115%
Harris Museum & Art Gallery	740	340	4,162	8%
Tullie House Museum & Art Gallery	5,204	1,353	5,507	25%
Total	24,427	11,578	24,117	

The table shows that both Manchester Museum and Bolton Museum and Art Gallery exceeded their PSA2 targets for 04-05 in just the final quarter of the year. Only the Harris (which was mostly closed during this time) failed to achieve at least 20% of its PSA2 target during this quarter. In 2005-06, the target for C2DE and BME true new users is 33,055 a 35% increase on 2004-05. In light of performances in 2004-05, the targets for individual venues for 2005-06 should be reviewed and re-allocated, so that each venue's target is realistic and achievable.

PSA1 School visits
Hub achieved 98% of its target for visits by school children in 2004-05
38% of school visits were made to Manchester Museum
85% of school visits made by pupils in Year 1 to Year 6
Untapped schools market is mostly for secondary school visits

PSA2
Hub achieved 48% of its PSA2 target for 2004-05 in final quarter of 04-05.
Bolton Museum and Art Gallery is most successful in attracting C2DEs
Manchester venues are most successful in attracting BMEs
Bolton Museum and Art Gallery and Manchester Museum accounted for 70% of the Hub's total for PSA2

7.2 Benchmarking research findings

Whilst the Hub and First Partner venues have a commonality in that they are all museums and/or galleries, they are, in many ways quite a disparate group. Comparisons in profile and performance across the whole Hub may not necessarily be useful or valid, for this reason we have grouped the venues according to type and locality. We can then report on the performance of museums against galleries and venues that are both museums and galleries; we will also look at differences between the venues in Manchester and those in Preston, Bolton and Carlisle.

The venue groupings are listed below:

Group 1: **Galleries only: Manchester Art Gallery and Whitworth Art Gallery**
Group 2: **Museums only: Manchester Museum and People's History Museum**
Group 3: **Museums and galleries: Bolton Museum and Art Gallery, Harris Museum and Art Gallery and Tullie House Museum and Art Gallery**
Group 4: **Venues in Manchester: Manchester Art Gallery, Whitworth Art Gallery, Manchester Museum and People's History Museum**
Group 5: **Venues elsewhere: Bolton Museum and Art Gallery, Harris Museum and Art Gallery and Tullie House Museum and Art Gallery (same as Group 3)**

The results of the benchmarking survey suggest that the content of the temporary exhibition had some impact on the profile of visitors at the Hub venues. To aid in the contextualisation of the results, details of the temporary exhibitions on at each venue during the research period are listed below. It should also be borne in mind that the Harris Museum and Art Gallery had only just re-opened during the period of the benchmarking survey, with only the temporary exhibition accessible to visitors.

Manchester Art Gallery: **Under My Skin (9 October – 9 January)** **LIV/MAN Part 1+2 (1 November – 1 June)** **Visions of Zimbabwe (4 December – 13 February)** **The View from Manchester – Don McPhee (15 January – 3 April)** **The Sleep of Reason (5 March – 30 May)** **Art of the Garden (5 March – 30 May)**
Whitworth Art Gallery: **Beauty and the Beast: New Swedish Design (26 February – 24 April)**
Manchester Museum: **Lest We Forget (November – March)** **Alchemy (March-June)**
People's History Museum: **Hazard! Health in the workplace over 200 years (22 January – 10 July)**
Bolton Museum and Art Gallery: **Lancashire Landscapes (28 January – 9 July)** **Recent Acquisitions: 1995-2005 (28 January – 9 July)** **The Glass Aquarium (19 March – 7 May)**
Harris Museum and Art Gallery: **Fantasy Architecture (29 January – 9 April)**
Tullie House Museum and Art Gallery: **Bad Behaviour (15 January – 27 February)** **Must Have Toys (12 February – 5 May)** **Carol McNicholl (5 March – 24 April)**

8 Size of potential market

8.1 Introduction

The success of the Hub venues in attracting existing visitors and the ease, or difficulty of acquiring new visitors is determined by the size of the current and potential museum and gallery markets in the North West. In other words, 'How many people are there in the region that currently go to museums and galleries, and how many more people are there we could be persuaded to do so?' The only way of establishing current and potential market size, market penetration, and comparing the profile of current and potential attenders against the demographic profile of the catchment area, is through a population survey.

Current and potential market size

This programme of primary research focuses on current attenders at specific Hub venues, and therefore cannot provide an estimate for the size of either the current or potential museum and gallery markets in the North West. However, using published secondary data on these markets it is at least possible to provide an estimate of their respective sizes.

Current market size

A digest of data on the museum sector published by MLA[3], includes data from a number of omnibus surveys and population studies that have been carried out in the North West in recent years which measure the size of the current market. The results of these surveys are detailed in the table below:

Table 35 - A digest of data on the museum sector

Survey	% current market	Market size (Millions)
TGI 2002-03 [4]	23%	1.2
Skelton 2002 [5]	30%	1.6
NWDA 2004 [6]	10%	0.5

[3] Overview of Data in the Museums, Libraries and Archives Sector, Ed, Simon Matty, MLA 2004
[4] Target Group Index 2002-3, C Creaser (Unpublished analyses prepared for Resource)
[5] Arts in England: Attendance, Participation and Attitudes in 2001 A Skelton, A Bridgwood, K Duckworth, L Hutton, C Fenn, C Creaser and A Babbidge, Arts Council England 2002

These market size estimates are based on an adult population (16 and over) in the North West of 5.3 million people[7]. Whilst the sample sizes in national surveys are large enough to ensure the robustness and statistical validity of the data, there are still significant differences in the results. **The size of the current museum market in the North West could range from 0.5 million to 1.6 million people.** This difference is unlikely to be accounted for simply by changes in museum attendance but may be due to some ambiguity with the definition of museums.

In these surveys there is no explicit distinction between the market for museum and the market for art galleries. Some of the data is quoted for 'museums and galleries' other figures relate to 'museum' attendance although it's unclear whether this also includes gallery attendance. Whilst it is acknowledged that there is probably significant cross-over between the two markets, they are in fact two distinct markets, with different profiles, different needs and different motivations[8].

Potential market size

There is no data in these surveys on the potential market i.e. those who haven't visited a museum or gallery in the past 12 months but would consider doing so. To the best of our knowledge, there are no published estimates available for the size of this potential market, either on a national or regional level. Information on this market - how big is it? who's in it? what would persuade them to visit is a critical piece of market intelligence for the Hubs, as PSA2 focuses entirely on the acquisition of true new users, and these, by definition, constitute the potential market.

Research carried out by Morris Hargreaves McIntyre for two local authorities in Scotland in 2002[9] (Dumfries and Galloway) and 2004[10] (Aberdeenshire), provides and indication of the relative sizes of the current and potential markets for museums and art galleries.

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[6] Participation in Sport, the Arts, Physical and Creative Activities in England's North West, Knight, Kavanagh and Page for the North West Regional Development Agency 2005
[7] Age Profile of the North West Region, 2001 Census Office for National Statistics
[8] Morris Hargreaves McIntyre Museum and Gallery Norms 2005
[9] Dumfries and Galloway Audience Atlas, Morris Hargreaves McIntyre 2002
[10] Aberdeenshire Audience Atlas, Morris Hargreaves McIntyre 2002

Table 36 – Examples of museums and art galleries market size (current and potential)

Market	Current		Potential		Rejectors	
	D & G	Aberdeen	D & G	Aberdeen	D & G	Aberdeen
Art Galleries	43	35	19	37	38	28
Museums	42	37	16	39	42	24

These figures suggest that the potential market contributes significantly to the size of overall market for museums and galleries, which in turn represents between 58-76% of the population in these regions.

8.2 Market penetration of North West Hub venues

The MLA Digest[3] provides estimates for the size of the current museum and gallery market in the North West. In measuring market penetration, the first step is to define the geographic catchment area for a venue. At venues such as theatres and cinemas, which routinely capture the postcodes of most, if not all bookers on box office databases, the primary catchment area is defined by mapping the postcodes of bookers that account for at least 80% of annual ticket sales[11]. This could involve mapping and analysing tens, or even hundreds of thousands of postcodes.

Depending on the geography of the area in which a venue operates e.g. if it's rural or urban, the amount of local competition, this primary catchment area could equate to a 20-minute or 60-minute drivetime from a venue.

At most museum and galleries, visitors' postcodes are not routinely captured for the whole population i.e. all visitors, therefore there cannot be a direct measurement of catchment area. However if a large, representative sample of visitor postcodes were collected, this data could be used map venues' catchment areas.

DBA Consulting[12] have recently analysed the geographic distribution of visitors to the six Hub venues. Whilst not defining catchment areas, their work reports on the proportion of visitors coming from within 30, 60 and >60minute drivetime areas. Their results are summarised in the table below:

[11] Box Office Marketing Guides by Roger Tomlinson, edited by Peter Verwey, Arts Council England
[12] Audience Segmentation Reports

Table 37 – DBA Consulting geographical distribution of visitors

	30-mins	60-mins	>60 mins
Manchester Art Gallery	41%	26%	34%
Whitworth Art Gallery	50%	27%	23%
Manchester Museum	52%	27%	20%
Bolton Museum & Art Gallery	76%	13%	10%
Harris Museum & Art Gallery	69%	15%	16%
Tullie House Museum & Art Gallery	38%	12%	50%

So how many people from within each drivetime are coming to the Hub venues? By dividing the number of visits at each venue by the average annual frequency (measured in the benchmarking survey) we can estimate the total number of visitors coming to the Hub venues in 03-04.

Table 38 – Number of visitors to Hub venues 2003-04

	Visits 03-04	Frequency	Visitors
Manchester Art Gallery	314,040	2.88	109,042
Whitworth Art Gallery	86,741	3.44	25,215
Manchester Museum	120,959	2.05	59,004
Bolton Museum & Art Gallery	271,702	3.07	88,502
Harris Museum & Art Gallery	138,895	3.87	35,890
Tullie House Museum & Art Gallery	206,216	4.64	44,443

By combining the results of the DBA research with the figures for visitors attending the Hub venues, we can calculate the number of people living within different drivetimes who came to the venues. These figures are shown in the table below.

Table 39 - Number of visitors to Hub venues by different drivetimes

	30-mins	60-mins	>60 mins
Manchester Art Gallery	44,565	27,828	36,649
Whitworth Art Gallery	12,620	6,886	5,709
Manchester Museum	30,853	16,132	12,019
Bolton Museum & Art Gallery	67,430	11,921	9,151
Harris Museum & Art Gallery	24,764	5,466	5,660
Tullie House Museum & Art Gallery	16,733	5,489	22,221

In order to calculate the market penetration of each venue, we need to know the size of the overall current museum and gallery market within each drivetime. Research commissioned by Arts Council England in 1996[13] measured the size of the art gallery market in the 30-minute drivetime of 97 cities in England including Manchester, Bolton, Preston and Carlisle.

Though this data is almost ten years old and the opening and re-development of galleries might have grown the market, it nevertheless provides an indication of the penetration rates being achieved by the Hub galleries.

There is no measure in the Arts Council's data for the size of the museum market but more recent research carried out by Arts Council England in 2001 estimated that 35% of the adult population in England had visited a museum in the previous 12 months. We have used this national figure to measure the penetration rates of Manchester Museum and the three Hub venues that operate as both museums and galleries.

Table 40 – Penetration rates

	30-mins	% Pop*	TGI 30 mins	% Pen
Manchester Art Gallery	44,565	19.8%	463,829	10%
Whitworth Art Gallery	12,620	19.8%	463,829	3%
Manchester Museum	30,853	35.0%	821,809	4%
Bolton Museum & Art Gallery	67,430	35.0%	751,756	9%
Harris Museum & Art Gallery	24,764	35.0%	331,941	7%
Tullie House Museum & Art Gallery	16,733	35.0%	37,033	45%

** Indicates the proportion of adults in the population who had visited an art gallery or museum in the 12 months prior to the research*

At most of the Hub venues, with the exception of Bolton and the Harris, approximately half the visitors come from outside the 30-minute drivetime area. This suggests that the primary catchment area for the other venues lies somewhere between 30 minutes and 1 hour. If the venues were to undertake a large-scale postcode collection exercise, these could be mapped to provide a more accurate definition of their individual catchment areas and would also measure the extent of overlap in their catchment areas.

[13] The Arts Council of England Area Profile Data

8.3 Estimate of the potential market size for Hub venues

As shown in the previous section there is sufficient secondary data available to establish the size of the current museum and gallery markets in which the Hub venues are operating. Due to the (almost) complete absence of secondary data, estimating the size of the *potential* market for museum and galleries is more problematic.

In the Audience Atlas published by Morris Hargreaves McIntyre for Dumfries and Galloway Council[9], approximately 40% of the population were in the current museum and gallery market and half as many (20%) in the potential market. In Aberdeenshire[10], the proportion of the population in the current market was slightly lower (~36%) but in this region, there were as many people in the potential market as there were in the current market. This variation can be attributed to a number of factors including geography, provision and the demographic profile of the region.

In estimating the size of the potential market for the North West Hub venues, firstly for galleries, it would seem reasonable to assume that if 20% of the population are current gallery attenders (Table 39), a further 20% of the population could be potential gallery goers. Similarly for museums, if the current market represents 35% of the population (Table 39), given the results in Aberdeenshire and Dumfries and Galloway, again, a potential market representing 25-35% of the population doesn't seem unreasonable.

On this basis we can estimate the size of the potential market within a 30-minute drivetime for each of the Hub venues and also estimate the number of C2DEs and BMEs in this market (on the assumption that the potential market is representative of the population as a whole).

Table 41 – Potential market size

	30-min popn	% Pop*	Potential Market	C2DE	BME
Manchester Art Gallery	1,270,376	20%	254,075	144,823	63,519
Whitworth Art Gallery	1,415,535	20%	283,107	161,371	70,777
Manchester Museum	1,396,228	30%	418,868	238,755	104,717
Bolton Museum & Art Gallery	1,154,643	30%	346,392	183,588	45,031
Harris Museum & Art Gallery	606,250	30%	181,875	94,575	30,918
Tullie House Museum & Art Gallery	140,219	30%	42,066	23,557	841

8.4 Recommendation

In order to measure the size and profile of the current and potential museum and gallery markets in the North West, we would recommend that the Hub undertake a population survey in the region.

Given the geographic distribution of the Hub venues, it would be advisable to conduct sub-regional surveys in Manchester, Bolton, Preston and Carlisle. As well as providing information for the region as a whole, and a means of measuring current market penetration, a population survey would provide an estimate of the size of the market that is, and could be shared by, for example, all the museums and galleries in Manchester.

A population survey would establish the number of potential C2DEs, BMEs and disabled true new users within a given region. Establishing the size of these markets would contextualise the Hub venues' performance with regard to their existing PSA2 targets and inform the setting of future PSA2 targets.

A population survey would also measure the extent of potential intra-regional travel i.e. what proportion of museum and gallery attenders in Manchester would travel to Bolton, Preston or Carlisle. This data could be used to inform the development or otherwise of Hub-wide initiatives.

9 Perceptions of non attenders

9.1 The proposition

Potential attender groups were asked for their thoughts and opinions of their local Hub museums and galleries. Their perceptions are compared to the individual venues' offer, to determine where the gaps currently lie.

In Bolton, Preston and Carlisle the groups were considering one venue, often the town or the city's main museum and gallery. Most had some awareness or experience of that venue and were therefore able to articulate their perceptions of it.

In Manchester the groups were considering four venues. In contrast to the groups in other towns, most of the individuals in the Manchester group had never been to the Manchester venues, with most never having heard of several of them, consequently they had no perceptions of the venue before the group took place. Most of the families in the Manchester group had however visited and enjoyed the Museum of Science and Industry in Manchester.

9.2 Bolton Museum, Art Gallery and Aquarium

The offer

Bolton Museum, Art Gallery and Aquarium is situated the town centre, within the same impressive building as the library and archive. The Museum permanent collections include an internationally renowned Egyptology collection and a Local History collection detailing the story of Bolton and the people who have lived there, as well as extensive Archaeology, Geology, Botany and Zoology collections.

The Art Gallery displays works from Bolton's Fine Art collection, comprising over 3,500 items, as well as photography and works on paper. Entry to the collection is free. The venue also mounts a programme of temporary exhibitions and related events.

The Museum and Art Gallery has suffered from a lack of capital investment over the years and consequently many of the permanent displays are looking tired and dated. Interpretation and display in the galleries is of a more traditional nature.

Perceptions

In exploring perceptions of Bolton Museum and Art Gallery a number of common issues emerged across both the Bolton Independent Adults and Family groups. Most adults in the groups had some experience of the Museum and Art Gallery, even if it was several years since they last visited.

A key reason cited by both groups for not visiting was the perception that the displays never changed. Having visited in the past, many felt that they had no reason to revisit.

> *This museum never seems to change. I have lived in Bolton all my life and the dinosaur has simply moved. It used to be stood in the middle of the floor there. Everything and nothing ever changes* ***(Parent)***

> *Once you have been you have seen it and there is nothing worth coming back for* ***(Independent adult)***

Amongst both groups there was a notable lack of awareness of the product offer. Most had not seen the publicity materials and did not know that the Museum and Art Gallery held temporary exhibition and events for adults and children. Upon finding out details, many expressed an interest in the exhibitions and events programme.

A second issue identified by both groups was that, compared to other venues, Bolton Museum and Art Gallery was old-fashioned. It lacked the modern displays, facilities and interactive elements they had experienced elsewhere.

> *It has just not changed and very quiet and seems to me an old fashioned and dusty place* ***(Independent adult)***

> *…it is not in the foreground anymore because of all this interactive stuff* ***(Independent adult)***

> *The Museum of Science and Industry in Manchester is more modern* ***(Parent)***

The groups also felt that the collections lacked relevance to them. They were aware that the museum holds a significant Egyptology collection, but could not see how that was relevant to Bolton, or how they might engage with it.

> *They are still on about digging in Egypt* ***(Independent adult)***

> *Like the Egyptology, I wouldn't even bother about going in that bit because it is just when I look at it, it all seems the same. One brown pot is the same as every other brown pot and the dates and all that mean nothing to me ...so I wouldn't enjoy that at all* ***(Parent)***

Visitor facilities at the venue were felt to be of a lower than standard than expected.

> *I have just come upstairs in the dirtiest lift I have ever seen. And I have just been into a disabled toilet where I had to be helped in by a security guard because you can't fit a wheelchair into it. That is the disabled toilet!* ***(Independent adult – disabled)***

> *It is making it more user friendly ...it lacks toilets* ***(Independent adult)***

Most of the children in the group had never visited Bolton Museum and Art Gallery. Their initial reactions to the venue were generally positive and they were keen to explore the collections.

> *I haven't been to this one before ...I think that it will be good to explore once I have seen it* ***(Child)***

> *When I went upstairs and saw the big dinosaur, all its bones, it creeped me out a little bit, but it was good* ***(Child)***

Their parents were more reticent, believing that the venue does not offer enough of interest to sustain a visit with children.

> *There is not enough to do* ***(Parent)***
>
> *In about an hour and a half you could have seen the whole museum including the aquarium. So it is not a day trip out* ***(Parent)***
>
> *...if we were in the museum part here it would be over in like half an hour and it would be so boring., but if we went to like Leeds it would take all day and be really good.* ***(Parent)***

During the Independent adults group it became clear that these potential visitors perceive that Bolton Museum and Art Gallery does not offer much by the way of local history. They believe that the focus of the collections is on Egyptology and Palaeontology, subjects that are not of direct interest to them.

> *Local history and how we lived in the past ...I mean, it is all very good to see a dinosaur, but on the other hand if you could see how you used to live* ***(Independent adult)***
>
> *I think that it should be more locally orientated. You know, what Bolton was like 100 years or 50 years ago* ***(Independent adult)***

9.3 The Harris Museum and Art Gallery, Preston

The offer

The Museum and Art Gallery holds over 75,000 items in its collections. The collections include a major collection of fine art, featuring nineteenth century sculptures, oils and watercolours and contemporary photography. The Museum also holds large collections of costume and textiles, ceramics and glass, including the largest collection of perfume bottles in the country. The Museum's social history collection contains items relating to the history of Preston, including a large collection of early photography. Entry to the collection is free. The Harris offers a range of exhibitions and activities for visitors

The Museum and Art Gallery is located in an impressive listed building in the centre of Preston, the building also houses Preston Library. The site recently underwent major works to improve visitor access. .

Perceptions

A perception of The Harris, held by both Preston groups, was that the displays are static and unchanging. Having visited in the past, the groups felt that there was little reason to revisit.

As with the other Hub venues, there is a lack of awareness as to the full extent of the offer at The Harris. Most individuals were unaware that the venue ran a programme of temporary exhibition and events, when shown the existing programme, many expressed an interest in visiting the exhibitions and participating in activities.

> *Everything is always the same. The paintings upstairs are always the same paintings that I saw like 10 years ago* ***(Independent adult)***
>
> *Well the building itself is nice. I have always liked the building. But you don't want always to see the same things* ***(Parent)***

The groups struggled to engage with The Harris' collections. In their experience they were disparate, specialist and lacked any tangible themes.

> *...something of more direct interest, rather than being a museum that has some of this bland, well all of these things for you to look at. A little bit more focused perhaps.* ***(Independent adult)***
>
> *... you just think the Harris is just a pendulum and all those bits of pots upstairs and that is it.* ***(Independent adult)***
>
> *It might be interesting but I'm not sure about the scent bottle collection, although it might interest the Avon ladies* ***(Parent)***

The Independent adult group perceive The Harris as a stilted, old-fashioned institution that would benefit from a more modern and inclusive approach.

> *The memory is of a stuffy place and I wouldn't go there again* ***(Independent adult)***
>
> *They want something like flashing light or something modern, it is 2005; you know what I mean?* ***(Independent adult)***

They also expressed some issues with the venue's facilities, believing that they were not sufficiently visitor focused.

> *Another thing is accessibility. I mean I can walk up steps but I look at some of those stairs and I think... I don't know if there is a lift unless you really ask.* ***(Independent adult)***

> *I didn't even know where the toilets are and if I go in there I would come out and go into the Guildhall for the toilets.* ***(Independent adult)***

There was a notable difference between the two groups when it came to perceptions of the staff at The Harris. Independent adults felt that the staff were disinterested and could be doing a lot more to make visitors feel welcome.

> *...when you go into the Harris they are not very welcoming. They have got staff there but they are chatting to each other and you are standing around and you would think they would say we have got this exhibition on in that part, but they don't do that.* ***(Independent adult)***

> *...you walk into the Harris Museum and there is some old guy stood there in uniform looked bored with his hands behind his back.* ***(Independent adult)***

> *I have walked in and I have walked straight out. You don't want them watching you and you feel they are a bit close to you.* ***(Independent adult)***

This was very different to the experience of those in the family group who had visited. They found the staff welcoming.

> *They are usually friendly. They are a lot nicer now than when I was younger. Friendlier and they don't glare at you and ask what are you doing in here* ***(Parent)***

9.4 Tullie House Museum and Art Gallery, Carlisle

The offer

Tullie House's collection numbers some 188,000 objects. Tracing the history of Cumbria from Prehistory to the present day, the Human History collection (Archaeology and Social History) features early tools, Elizabethan weights and measures, a local photographic archive and a range of oral history recordings.

There is also an extensive Natural Sciences collection, comprising Botany, Zoology and Geology, The Fine Art collection is made up of some 2,800 British paintings, prints and drawings of the 18th-20th centuries, while the Decorative Arts collection features porcelain, costume and musical instrument. Tullie House also runs a programme of temporary exhibitions and events.

Tullie House is located in the centre of Carlisle. It comprises an old historic building and a new extension built for the Millennium. Admission is free to Carlisle District residents with a Tullie Card, non-residents, or those without a Tullie Card, pay £5.20 for an adult and £2.60 for a child aged 5-16, under 5s enter free.

Perceptions

For both groups, cost is an issue at Tullie House. While local people are generally aware they can gain free entry, there is confusion as to how you obtain the card that is required to prove eligibility. The cards also act as a barrier in that they require an element of forward planning and negate against people visiting on a whim, or bringing non-residents with them.

> *...everyone else has got to pay and in other areas like the Railway Museum it is free for everybody* ***(Independent adult)***
>
> *There were a few times that I was going to come but I have lost my card as well so I thought I am not paying again* ***(Independent adult)***
>
> *I thought it would be a couple of pounds and I was embarrassed* ***(Parent)***

There is a perception amongst Independent adults that the permanent displays at Tullie House have not changed in a long time. They do not feel any impetus to revisit the venue, as they believe that they have already experienced all it has to offer.

There is a general lack of awareness amongst the groups as to what was on at Tullie House. Many did not know about the exhibitions and events programme but would have been interested in participating had they have known.

> *They don't seem to change. It seems to me from day one it has been the same.* ***(Independent adult)***
>
> *There are only so many artefacts that we have and we have probably seen them all* ***(Independent adult)***

Several individuals in the Families group had never visited the venue and were not aware of what the collections comprised.

> *You don't know what it is like, do you? And to be honest I can't say* ***(Parent)***

> *I don't know what is in there* ***(Parent)***

Parents feel that the Museum currently does not offer enough for children. They believe that the display and interpretation of the collection is inaccessible to young children and lacks the interactive elements of other, more visitor focused venues.

> *Somewhere small like this they need to make it more hands on ...I mean, it is nice to see the old stuff and yeah we want our kids to see them but they don't make it accessible* ***(Parent)***

> *...kids need a lot more these more these days. They have got a short attention span as it is but kids they want to get in there and see how it works and to see what's what and don't just want to look* ***(Parent)***

Some individuals in the Independent adults group had experienced an unwelcoming reception from members of staff at Tullie; this had put them off revisiting the Museum.

> *You walk into the Sands and there are people in there and it gives you the impression they are welcoming you, but you walk in here and it seems as though it is like you know "what are you doing here" sort of thing.* ***(Independent adult)***

> *It might just be me personally, but every time I come here it is like a real attitude problem. It is like it is a closed club type thing* ***(Independent adult)***

9.5 The Manchester Museum

The offer

The Manchester Museum, located just outside the city centre, is administered by The University of Manchester. It is located in the heart of Manchester University Campus on a major bus route and in one of the Universities historic buildings. As a university museum there is a strong focus on research.

The Museum's collections consist of almost six million specimens and objects, divided between the Humanities (Anthropology, Archaeology, Archery, Egyptology and Numismatics,) and the Natural Sciences (Botany, Mineralogy, Palaeontology, Petrology and Zoology). There is also a research collection of live animals (mainly frogs and lizards) in the Vivarium. Entry to the collections is free. The Museum also mounts a programme of temporary exhibition and related events

The Museum recently underwent a major capital redevelopment scheme funded by the Heritage Lottery Fund to improve visitor services and Museum displays. This significantly alters the inside of the museum but is little evidenced from the road.

Perceptions

Several individuals in the Manchester Independent adults group had visited The Manchester Museum; however, this was likely to have been several years previously. As with many of the other Hub venues, there is a perception amongst potential visitors that the displays are unchanging; this is despite the Museum having recently undergone a major gallery refurbishment programme.

> *I have not been here for years and so I don't even know and I just think that it has got the same stuff in it like when I came when I was 6* ***(Independent adult)***

> *Because once you have been once and if the collections are the exhibitions were the same you wouldn't go for months and months. And so it is kind of a once off thing* ***(Independent adult)***

The Family group had some awareness of the Museum, having either visited it at some point as a family, or the children having visited as part of a school trip. Amongst families, the Museum is associated principally with its Egyptology and Palaeontology collections, mummies and dinosaurs being particular areas of interest for children.

> *We have been before but I think it was the Egyptians and dinosaurs that attracted us* ***(Parent)***

> *I have been and I just know it as the place where the dinosaurs and mummies are* ***(Parent)***

> *Is this the one with the skeleton in?* ***(Parent)***

There was some confusion as to the location of the entrance to the Museum, with visitors experiencing difficulties in finding since it moved off the main road.

> *The entrance used to be on the front here and now it is around the back. We walked past it about three times didn't we until he said I think it is down here?* ***(Parent)***

9.6 The Whitworth Art Gallery, Manchester

The offer

The Whitworth Art Gallery is part of the University of Manchester. The aim of the Gallery is to promote the study and enjoyment of art, craft and design. It is home to a significant collection of watercolours, prints, drawings, modern art and sculpture, as well as a large collection of textiles and wallpapers. The Whitworth uses its collections to create changing exhibitions, it also hosts touring exhibitions and organises a programme of events and activities for formal and informal learning.

The Whitworth is located just outside Manchester city centre in Whitworth Park, near the University campus and opposite the Manchester Royal Infirmary. Entry to the collections is free.

Perceptions

A small number of individuals were aware of the Whitworth Art Gallery, knowing of its location and a few details about the collection. Only a minority of these had ever visited. For most it was far off their radar.

> *That is an art gallery?* ***(Parent)***

> *Do they have a Turner there?* ***(Parent)***

> *Well I don't class that as an art gallery, I think it is more a museum* ***(Independent adult)***

9.7 Manchester Art Gallery

The offer

Manchester Art Gallery's collection number some 25,000 items spanning six centuries of British and continental fine and decorative art. The Fine Art collection comprises oil paintings, watercolours, drawings, sculptures, miniatures and prints. Strengths of the Fine Art collection include Pre-Raphaelites paintings and 20th-century British art. The Gallery's Decorative Art collection incorporates ceramics, metalwork, furniture, antiquities, Eastern collections, wallpapers and glass, ranging from ancient Greek pottery to contemporary furniture. Entry to the collections is free. The Gallery also hosts a programme of temporary exhibitions and events.

Manchester Art Gallery reopened in May 2002 following a four-year programme of expansion and refurbishment, doubling the display space and adding interactive learning and drawing spaces for families. The Gallery is located in the city centre.

Perceptions

There was a considerable lack of awareness of Manchester Art Gallery amongst these potential visitors. None of the families in the group had ever visited the Gallery and most were unaware that it even existed.

> *I think I know where it is but I have only walked past it* ***(Parent)***

> *I didn't even know it existed. I thought to be honest that Manchester Art Gallery was that Whitworth thing* ***(Parent)***

A couple of the Independent adults in the group had visited the Gallery in the past, but had failed to engage with the collections.

> *I have been there a few years ago now and it was so boring ...I have got no interest in art anyway* ***(Independent adult)***

> *[I have visited] once or twice for a brief 20 minutes* ***(Independent adult)***

Others were again unaware of its mere existence.

> *I don't even know where it is, where is Manchester Art Gallery?* ***(Independent adult)***

9.8 People's History Museum, Manchester

The offer

The People's History Museum is the national centre for the collection, conservation, interpretation and study of material relating to the history of working people in Britain. The Museum uses reconstructions, documents, objects and banners to tell the story of ordinary people. Topics covered through displays and reconstructions in the Museum include Trade Unions, Peterloo, Sweated Work, The Co-Op Shop and Football. The Museum also houses the world's largest collection of historic trade union and political banners, with over 300 banners in the collection.

The People's History Museum is located in Manchester city centre. Admission to the Museum is £1 for adults and free for children, admission is free for all on Fridays.

Perceptions

As with the other Manchester venues, there was a significant lack of awareness of the People's History Museum amongst both groups. None of the individuals in either group could recall ever having visited the Museum, although some were aware of it.

> *At the bottom of Bridge Street, although I know nothing about it but I have never been* ***(Independent adult)***

> *I have heard of it but I have not actually been* ***(Independent adult)***

> *Has it got like a 1950s kitchen?* ***(Parent)***

Once the Museum's basic proposition was explained to the groups some expressed an interest in visiting. They were particularly keen on the idea of the history of ordinary people.

> *I have not been but I would be interested because it concerns people and is not something abstract* ***(Parent)***

> *When I started reading the text I realised that it was all about people and how they have come along in life. I would say quite honestly I would take the children to that* ***(Parent)***

10 Who might visit, why and how do we reach them?

Sturgis and Jackson[14] state that factors which predict visits to museums and galleries include:

- Higher socio-economic class
- Being in a higher income household
- Home ownership
- Being single, never married
- Living in smaller households
- Being unemployed
- Retired or working part-time
- Higher educational qualification
- Not doing voluntary work
- Living in an area with higher unemployment rate

Renaissance in the Regions aims to combat these factors by making museums more appealing and relevant to a wider diversity of people.

Looking at the potential for audience development, in theory, the market for museums and galleries could constitute the entire population within a given catchment area. Segmenting this market by whether people attend or not is over-simplistic. Even with a substantial increase in funding, museums still have limited resources when it comes to competing for mainstream audiences. In light of limited resources we need to identify who within the potential market has the greater propensity to become an attender. Our research reveals that the potential market consists of at least five segments that make up an Audience Pyramid below.

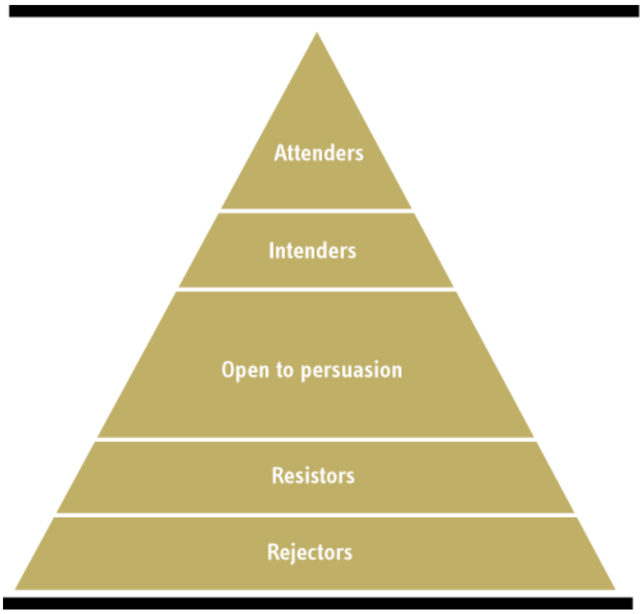
In selecting a leisure time activity, the decision to visit a museum or gallery is dependent upon a belief in the ability of these organisations to meet individuals' needs. Many non-visitors choose not to attend museums and galleries because they do not believe that they will meet their specific needs.

[14] Report on the 2000 UK Time Use Survey for Resource: Examining the Use of Museums, Archives, Galleries and Libraries, P Sturgis and J Jackson 2003

10.1 The Audience Pyramid Model

The Audience Pyramid model below represents the whole population, and segments this constituency into a hierarchy of intention or motivation to engage with any cultural activity, in this case, museums and galleries. The individual segments in the model reflect different levels of belief in the ability of museums and galleries to meet their needs.

Audience Pyramid



(c) Morris Hargreaves McIntyre

ATTENDERS

Those who are currently in the market and as such know that museums and galleries can meet their needs. These are typically a smaller number of people who account for a large number of current visits. Attenders already visit a wide range of museums and galleries. With effective communications and an attractive offer they can be persuaded to visit new venues, return to places they have been to in the past and visit their favourites more frequently.

INTENDERS

Those who already want to attend, but are waiting for the opportunity. These people too therefore believe that museums and galleries can and will meet their needs. For these people there may be some barriers but they are ones that can be relatively easily addressed.

OPEN TO PERSUASION

These are people who might be described as not hostile to the proposition of attending a museum or gallery. However they are not necessarily convinced that visiting a museum or gallery will meet their needs and as such will require active persuasion that a visit will do so.

RESISTORS

These people are sceptical that a visit to a museum or gallery could meet their needs. This can be due to a lack of understanding of their own needs; to negative preconceptions, which may or may not be accurate, and can also be due to their recollections of previous, unsatisfactory visits often in organised schools groups. This segment is more likely to respond to outreach initiatives.

REJECTORS

These are actively hostile to the notion of engaging with museums and galleries – they are convinced it is not for them.

The next sections of the report deal with what type of people do not visit museums but might, and the issues relating to intenders, those open to persuasion, resistors and rejectors i.e. those not currently being attracted to visit museums and galleries.

10.2 Intenders

Children are classic Intenders

The qualitative research carried out into potential attenders identified that children are classic Intenders, having had their appetite whetted through school visits to museums. They generally have positive views of museums and believe that they offer the opportunity for both learning and an enjoyable social experience. Whilst their experience of art galleries is more limited, many perceive that galleries could provide a similar experience to museums. The children who took part in the groups want to attend museums and galleries but are reliant on their parents or carers to provide them with the opportunity to visit.

Positive perceptions of museums

Children hold positive perceptions of museums, based on their experiences of visiting with school and family outings to national and regional museums. Subject areas of interest when selecting museums to visit as a family are predominantly science, transport, industry, war, natural history and local history.

Children value the opportunity to spend quality time with other members of their family that museums present.

> *Spending time together and not being stuck at home being bored* ***(Child)***

> *...we just have fun together* ***(Child)***

They view museums as offering the opportunity to learn in a fun way, as an antidote to more formal classroom based learning

> *... see things and you feel better and get a better understanding* ***(Child)***

> *You can touch stuff and you can come out knowing stuff even though you don't remember learning it because here it was fun and you weren't just sat in a classroom* ***(Child)***

A significant factor making learning in museums enjoyable is the inclusion of hands-on activities.

> *You do activities that you wouldn't do at home* ***(Child)***

> *...there were pictures of Queen Victoria and theatres and toys, which you could play with* ***(Child)***

Children have a limited experience of art galleries

There were mixed views of galleries amongst the children in the groups. The immediate reaction from most children was that galleries were less appealing than museums:

> *Even more boringer [sic] than a museum* ***(Child)***

> *Museums are more fun* ***(Child)***

However, this reaction was based on a limited experience of visiting galleries. Many of the children felt that they would be open to visiting galleries, given the opportunity.

> *I might find it interesting because I like art and I like to look at it* ***(Child)***

> *Wow I want to be an artist* ***(Child)***

> *I would like to go to the Tate Modern and that would be really interesting because I am doing art for GCSE. So I would like to go along and get a feel for the art* ***(Child)***

Whilst the children had experienced and enjoyed hands-on activities in museums, reservations towards art galleries were largely based on a perception that visiting a gallery would be a passive experience.

> *...is it going to be fun? Is it just pictures or do they show you how they make paintings?* ***(Child)***

> *... touch stuff rather than just looking at things* ***(Child)***

Outstanding needs of children

Product development

For children, the need to take part in hands-on activities is central to their enjoyment of museums and galleries. This group is primarily motivated by Social and Intellectual needs; activities that the whole family can take part in are essential in fulfilling these needs. Children need to be certain there will be hands-on activities on offer whenever they visit a venue, these activities can range from high-tech interactives and organised events, to low-tech handling objects and drawing materials.

> *...include stuff that you can actually do instead of just looking at things* ***(Child)***

> *...if they had activities as well so that you could draw and sketch and learn new techniques* ***(Child)***

Venues must recognise that children are not an homogenous group. There are considerable differences in the visiting requirements of different age groups; what appeals to a six year old is unlikely to appeal to a self-conscious twelve year old. The venues need to consider the differing interests and needs of younger visitors and tailor activities to meet these needs.

> *I like creating things ...like the CD covers* ***(Child)***

> *...there was this self-portrait for 14 to 19 year olds and that would appeal to me* ***(Child)***

Communicating the proposition

Children already hold largely positive perceptions of what museums and galleries can offer and can be convincing advocates in initiating a family visit. Venues should seek to capitalise on this enthusiasm and target communications directly at children. In order to do this communications should be visually appealing, using colour, text and images that appeal directly to children. Images of children participating in the activities on offer and comments from other children were popular suggestions.

> *When I saw the sticking down and cutting out stuff I thought "oh wow"* ***(Child)***

> *...you could interview a kid and a adult and see what they both think* ***(Child)***

Print that appeals to parents is less likely to generate interest from children, and more likely to be passed over.

> *Something colourful, because that looks like an adults picture* ***(Child)***

> *...it needs more pictures because if that came through the door I would just put it on the shelf for my mum and dad to read* ***(Child)***

Communications targeted at children need to be carefully considered. The wrong images, words or colours could alienate potential young visitors. Testing reactions to initiatives on the target market is good practice and will identify potential pitfalls before it is too late.

> *It is for young children like 6 year olds and stuff and they are just showing them pictures ...all of them are really young.* ***(Child)***

> *Too pink for the boys to look at* ***(Child)***

> *Get a kid to help you* ***(Child)***

Implications for attracting children

Empowerment

Children already believe that a visit to a museum or gallery can fulfil both Social and Intellectual needs and are already strong advocates for museums and potentially galleries. Empowering children to convince parents and carers that visiting a local museum or gallery would be an enjoyable experience would be an effective audience development strategy.

In order to empower children, venues need to consistently offer hands-on activities that are appealing to children of a wide age range and produce promotional materials targeted at children. To be effective, promotional materials must be visually appealing to children and enable them to effectively communicate the proposition to their parents. Distributing promotional materials through schools adds advocacy.

Child panels to advise museum and gallery staff on publicity and product development would be low cost, effective means of developing the offer for younger visitors.

10.3 Open to persuasion

The qualitative research identified two groups of potential visitors who could be described as open to persuasion in their attitudes towards museum and gallery visiting. These are 1) C2DE parents and 2) a group we have defined as social visitors. These are independent adults who visit museums and galleries when away from home, but do not currently visit their local venues. Both these groups are not hostile to the idea of visiting museums and galleries, but would require active persuasion to convince them that a visit to a local venue will meet their needs.

C2DE Parents

C2DE Parents look to meet the needs of the family group. In selecting family leisure time activities, parents put their children first and are generally happy to consider anything that they think their children will enjoy. They are driven by a strong social motivation; spending quality time together as a family and taking part in activities are important criteria for an enjoyable family outing.

Cost is a major factor, which means that activities are often selected for the fact that they are free. Popular activities to take part in as a family include visiting country parks and sports. For some families holidays, shopping, eating out and theme parks also feature as popular family activities.

...just interested in what the kids want to do ***(Parent)***

...because we have kids and we always look for the kids first before ourselves ...to keep them entertained and give us a peaceful night ***(Parent)***

When selecting leisure activities to take part in as a family, parents must consider the requirements of a variety of ages and interests within the family group.

We might go out as a family and we might go to Southport and we will go around the pleasure beach and my wife and my eldest daughter will go shopping. Then we will meet up again. ***(Parent)***

We haven't been to any because she has got a sister and she is only 6 so it is a bit early just yet ***(Parent)***

Parents look for activities that will keep the whole family entertained for at least half a day to make the trip worth their while

The Aerospace Museum and Manchester Museum it is all in one ...you have to spend the whole day to go around it ***(Parent)***

They just get bored and you try to find stuff where they are occupied for about 2 hours ***(Parent)***

Parents perceive that museums could fulfil their needs

Parents, like their children, believe that museums offer the opportunity to spend quality time together. The museum environment can promote discussion and family interaction; serving to fulfil their Social needs.

Discussing it as a family ...That sort of thing it promotes discussion and that makes it an enjoyable day if you can actually talk on a level and get something out of it. ***(Parent)***

We could have a good old chat about it and when we get home still be talking about it and we have learned something. Not just the children ***(Parent)***

Parents perceive that some museums can fulfil their social needs. They also believe that museums have an educative role and can offer a stimulating way of learning based on objects and experiences.

> *...if you look at the skeleton of a dinosaur on an Internet page you think ok. But if you stand underneath one and it is 30ft above you and you get some feel for the size and length of this thing and then it makes a lasting impression on you rather than a photograph* ***(Parent)***

> *It is a good way of teaching ... if you can see it in real life it is a bit more stimulating* ***(Parent)***

C2DE Parents' positive perceptions of museums are largely based on experiences at national or large regional museums. They are more reticent about local museums as they are not convinced that they will offer enough of interest to engage the children for any length of time. There is a real fear that children will quickly become bored and the experience would not be an enjoyable one for any of the group. In addition, they believe that having visited their local museums once, there is little reason to re-visit as they do not change what is on offer.

> *There is not enough to do* ***(Parent)***

> *In about an hour and a half you could have seen the whole museum including the aquarium. So it's not a day trip out* ***(Parent)***

> *This museum never seems to change ...nothing ever changes* ***(Parent)***

Galleries are perceived to be less relevant than museums

While most of parents in the groups had some experience of visiting museums and could appreciate how they might meet the social and intellectual needs of the family group, their experience of galleries was far more limited and many could not conceive of a situation whereby they might take children to an art gallery. Galleries were not felt to hold any immediate relevance or appeal to them.

> *I think that it is only rich people who are interested in it* ***(Parent)***

> *They are pointed at a certain class I find* ***(Parent)***

> *They're stuffy* ***(Parent)***

Parents' main concern when faced with the proposition of visiting a gallery with their children is a lack of understanding of art. This is a real issue for them, as they fear that they cannot make a visit to an art gallery an enjoyable experience for their children.

> *I know nothing about art… That would be my first concern* ***(Parent)***
>
> *I couldn't bring him because I wouldn't know what I was telling him* ***(Parent)***

That is not say that parents did not value art, some art was appreciated for the skill and technique it represented. This was a potential point of connection with artworks.

> *It would be nice to see a real Turner and be in the presence of a real Turner or Picasso.* ***(Parent)***
>
> *If it is a real nice picture and you can see how somebody has really caught a person or a horse or a landscape I can appreciate that because you think I wish that I could do that.* ***(Parent)***

On deeper reflection, and often following prompts from their children, parents did conceive of potential benefits from visiting art galleries as a family group. These benefits were primarily perceived as encouraging children to draw and paint.

> *The first thing that children do is draw. One of the first things that they do is they pick a pen up before they write a letter they are drawing circles and head and eyes and that is the first thing that they ever do. And when they get older they stop thinking of drawing and it is a shame really.* ***(Parent)***
>
> *…if it is on an educational side, let kids feel the texture… Teach them how to mix up the different colours* ***(Parent)***

For this group of non-attenders, there is a huge risk factor that needs to be overcome before parents will consider visiting local museums and galleries with young children.

It could be a waste of time ***(Parent)***

Would you risk it from them being bored and finding nowhere to park or would you put them in the car and take them to Southport ...where you are guaranteed ***(Parent)***

Outstanding needs of C2DE Parents

Product development

When considering local museums and galleries, there is a very real fear held by parents that their children will not be sufficiently catered for. Parents want the venue to provide enough hands-on activities to keep children engaged. This is even more pertinent an issue with galleries, as it is perceived that they only offer passive experiences

...kids need the hands on approach, you have got to get them interested by touchy feely and smell even. You have to do that because they spend all their time at school and they come here and they have got to read ***(Parent)***

This need for hands-on activity is also a reflection that parents know or fear that they do not have sufficient knowledge to facilitate their child's visit themselves. These parents worry that they will not be able to make the visit interesting and enjoyable for their children and fear them becoming bored. They feel inadequate and so want reassurances that children will have their needs catered for without the need for parental intervention. Hand-on activities become a proxy for any activity that entertains and enlightens adults and children; this might include alternative captions for children, family trails and worksheets.

You are trying to figure out what they have done ***(Parent)***

I can't really make it more exciting for them or try and put it in their language ***(Parent)***

Because it is hard work. It is frightening really. ***(Parent)***

C2DE Parents need additional assurances that venue staff are going to welcome children and facilitate their visit. To appeal to families, museums and galleries must ensure that staff adopt a family friendly approach at all levels in the organisation, this may require additional training and role changes.

> *I am not cultured enough to know all about the museum and all the articles in there. I personally wouldn't make a big deal about going to a museum unless I knew that there would be someone there to look after the children or to look after me.* ***(Parent)***

> *...if there were someone there who knew what they were talking about and could put it into children's language and in adult's language where you could listen to them and question* ***(Parent)***

Embarking on a family day out takes considerable planning and parents need assurances that it will be worth their while. Venues need to ensure that they can provide enough interesting elements to fill a half or full day out.

> *... I would like my kids to be able to go and do a painting here. Then you know you would be here for longer and not just coming in and then looking at it and then going* ***(Parent)***

> *Children have got a much shorter attention span than we used to have nowadays. If it is not exciting and it doesn't go bang...* ***(Parent)***

Services and facilities

In deciding to visit a venue as a family, parents must address a myriad of practical issues. These include parking, opening times, gift shop, refreshments and price. Each of these elements must be addressed by the venue to promote ease of access for families. Families also want to feel welcome in a venue and staff can make a huge difference to how comfortable they feel.

> *…how to get there, parking… food and are there going to be sarnies and are we going to eat there and then the cost of it* ***(Parent)***

> *…if you are not working and think "oh we will go out and entertain the kids" and they are shut on bank holidays* ***(Parent)***

> *…small shop for kids so they buy something before they go* ***(Parent)***

Communicating the proposition to parents

The initial issue to overcome for this group is their palpable lack of awareness of what their local museums and galleries already offer, or indeed in some cases that they actually exist. As local museums and galleries are not at the forefront of their minds when selecting a family leisure activity, they are unlikely to proactively seek out promotional materials. When the proposition was articulated to them many were very interested, indeed some were agitated that they had not been made aware of what was on offer before.

> *I mean where do you get these from? I have never seen them. Never anything like that comes through my letterbox* ***(Parent)***

> *…you never see any information or literature on a art gallery that has got a new exhibition or something. If you are not within the circle that like art you don't know about them* ***(Parent)***

With C2DEs, it is clear that if the culturally mainstream audience is being targeted, mainstream media will be needed to convince them that they are the market being communicated to. If niche media is used they will assume it is addressing a different market to them, if indeed it reaches them at all. This segment needs to be targeted directly with promotional materials and awareness raising via the television, press and radio, to encourage pester power.

> *…put leaflets through doors and come and see and maybe remind us about it so that we can take the children ourselves instead of school taking them* ***(Parent)***

> *They should put adverts on the telly …especially when the kids are off let parents know what is available during half term.* ***(Parent)***

The difference between Abc1 parents and C2DE parents is that the former are looking for museums to be primarily educational and also entertaining whilst and the latter are looking to museums for entertainment first and education second.

Advocacy via schools was also identified as a useful means of reaching the parents via the children.

> *They have got to get some of these leaflets to us. As I say we are not going to come and pick them up. They have got to get them to the schools … Send some people out to the schools and have a chat to the kids* ***(Parent)***

> *… they have asked, but it is usually following a school trip* ***(Parent)***

While communications need to be aimed at children, they must also reassure parents that a visit will be enjoyable for all the family and provide the practical information that parents need for planning a visit. Significantly, there is still a common assumption among many non-attenders that museums and galleries levy admission charges; publicity materials should clearly state where entry or events are free.

> *It is more hands on… at least you can see what you are going to do, that would get me more. It say's more fun things to do* ***(Parent)***

> *How much to get in to the toy one? Is it in there? It isn't on the flyer* ***(Parent)***

> *"free for families" always goes down well. I know that it is free anyway but it is nice to be reminded* ***(Parent)***

Implications for an audience development strategy amongst parents

Reassurance

C2DE Parents are aware that museums and galleries can fulfil intellectual needs, but need to be convinced that can also fulfil the social needs of a family visit. The major issue for parents is that of the risk. They are concerned that a visit to their local museum or gallery will not be an enjoyable experience and so turn to activities where they have guarantees that it will be enjoyable, either through previous experience or through advocacy or brand guarantees.

In order to develop the family market venues must reduce this risk factor. The promise of hands-on activities, facilitated visits, a full / half day out, elements for different ages and family friendly facilities and services are all essential in convincing parents that a visit would be an enjoyable experience. This group needs to be targeted directly, via a combination of direct mail, media coverage and advocacy via schools and children.

Social visitors

Social visitors already visit museums and galleries whilst on holiday but are currently unlikely to consider visiting their local venues.

> *I went out to Spain in September and I went to a gallery …you do that don't you, but not in Preston?* ***(Independent adult)***
>
> *When we go abroad we go to museums and not our local ones* ***(Independent adult)***

While these potential visitors are aware of the social benefits of visiting museums and galleries, and do visit as a tourist activity, they do not perceive museums and gallery visiting as a leisure pursuit in their everyday lives. For them, visiting museums and galleries requires proactivity, consequently it is something they might do when they are relaxed, for example on holiday, but it is not something they would do *in order to relax*. They have no awareness of the emotional or spiritual benefits of visiting museums and galleries. They equate visiting museums and galleries in everyday life with hard work.

> *Weekends are for relaxing* ***(Independent adult)***
>
> *If you think, "oh I will have a day out". You don't think, "I will go to a museum". Whereas with other things you think that is a day out.* ***(Independent adult)***

These visitors may have visited their local museums and galleries in the past, when they were children or to take their own children or grandchildren, but they have since fallen off their radar. There is a perception that the displays at local museums and galleries remain static. Having visited their local venues in the past, Social visitors feel that there is little imperative to revisit.

> *My father used to drag me up to look at the birds. And yeah and the grandchildren when they were little I brought them here often.* ***(Independent adult)***

> *They don't seem to change. It seems to me from day one it has been the same* ***(Independent adult)***

Outstanding needs of Social visitors

Product development

Social visitors need to be given a reason to visit their local venues. Venues need to challenge their perceptions of local museums and galleries as being static and unchanging. Product developments might include renewed displays, temporary exhibitions and events.

> *You could market it well and have rubbish inside, but once people have been in and seen that it is rubbish they are not going to go again.* ***(Independent adult)***

> *Once you have been once and if the collections and the exhibitions are the same you wouldn't go for months and months. And so it is kind of like a one off thing* ***(Independent adult)***

Services and facilities

If local museums and galleries are to fit into the lives of this segment and be viewed as an attractive leisure time option, then opening times need to fit into their lifestyles. Many work nine to five and weekends are already taken up with other activities. There is support for evening opening tied in with special events, encouraging Social visitors to view visiting museums and galleries as constructive leisure time, in the same way as they might view evening classes and after work leisure activities.

> *...not everyone can get there at weekends because you have other stuff to do at weekends.* ***(Independent adult)***

> *An evening thing would be a good idea. They could have lectures on.* ***(Independent adult)***

To make this group visit and revisit, venues need to provide high quality facilities and exemplary customer services. This group needs to feel welcome and comfortable if visiting is to be an enjoyable leisure experience. They also need to feel proud and confident enough of their local attractions to bring visiting friends and relatives.

> *I have just come upstairs in the dirtiest lift I have ever seen.* ***(Independent adult - disabled)***

> *...the atmosphere being dour and not inviting and when you go in there people don't seem to want you there.* ***(Independent adult)***

> *I couldn't find them [toilets] and I couldn't find a member of staff to ask where they were* ***(Independent adult)***

Communicating the proposition

In order to attract these visitors venues must convincingly communicate the social aspects of visiting. Upon being shown promotional print from the venues, there was interest in a number of the exhibitions and events already programmed, but a lack of awareness that these sorts of events were on offer.

> *I was quite surprised by the variety of exhibitions* ***(Independent adult)***

> *I would like to see the Cumberland News and Photographic Exhibition as well. But I didn't know anything about any of those* ***(Independent adult)***

Social visitors are looking for things to do in their leisure time and are receptive to 'what's on' information, however they do not proactively look for information regarding what is on at their local museums and galleries. Venues need to be more proactive in targeting them with relevant information.

> *...you know what is on at the pictures but you never know what is on at these things.* ***(Independent adult)***

> *We run a community group and we have our own building that we run from and we get sent stuff but I have never been sent these for the whole 2 years I have been there.* ***(Independent adult)***

In addition to print, venues also need to look to a using broader media channels to reach Social visitors. This might include television, radio and newspapers.

> *You have got radio and local TV. BBC North West. Everybody either reads the paper or listens to radio or watches the telly.* ***(Independent adult)***
>
> *...more advertising I think. ... and it costs money I know but just to see it on the TV or somewhere where you are always looking.* ***(Independent adult)***

Implications for an audience development strategy for Social visitors

Challenge preconceptions

Social visitors are not hostile to the idea of visiting museums and galleries, however they do not currently perceive that a visit to their local venues offers an enjoyable leisure experience.

This segment needs to be convinced that visiting local museums and galleries is a sociable and enjoyable leisure pursuit in their everyday lives. A well publicised programme of changing exhibitions and events, re-launches of existing collections, welcoming staff, pleasant facilities and services and late night opening will enable local museums and galleries to better meet their leisure needs and fit into their lifestyles. If Social visitors can initially be encouraged to visit museums and galleries as a means of fulfilling their Social needs, venues will have the opportunity to develop them into more engaged, more frequent visitors.

Once again, awareness of and feeling a sense of pride in local attractions are also fundamental in attracting in Social visitors.

10.4 RESISTORS

Perceptions of museums and galleries

Resistors are sceptical that museums and galleries could meet their needs

The qualitative research identified a group of potential attenders who were Resistors in their approach to visiting museums and galleries. Whilst Resistors can see the value of museums and galleries for others, they cannot conceive their relevance to their own lives and are therefore sceptical that a visit will fulfil their leisure needs. These individuals need to be convinced that museums and galleries are relevant to them if they are to find a place for them in their lives.

Recognise the value of museums and galleries

Resistors are not opposed to museums and galleries in principle. Indeed, they can see the value of museums and galleries to others, principally children, tourists and specialists.

> *...tourists and school kids* ***(Independent adult)***

> *It is ideal for artists ...but for someone like a layman like me it is just confusing* ***(Independent adult)***

Sceptical they can meet their needs

Resistors do not believe that museums and galleries hold any relevance to them, they do not even contemplate visiting as a leisure time activity.

> *I don't go because I don't think that there is anything there for me.* ***(Independent adult)***

> *I have kind of avoided it and said that is not for me.* ***(Independent adult)***

These individuals hold negative perceptions of museums and galleries as boring and unwelcoming places; this tends to be based on recollections of past visits, often during their childhood. They have no reason to believe that the state of affairs in museums and galleries has changed since their early off-putting experiences.

> *I did go there with the school ... So that brings back a memory of this old stuffy place* ***(Independent adult)***

> *When I was a kid it was boring and that has stuck with me then through life* ***(Independent adult)***

Having grown up with little experience of museums and galleries, Resistors fear that they lack the intellectual tools to make a visit an enjoyable experience. They have a real concern that their lack of understanding will make them look foolish and out of place.

> *I don't feel that I would have enough to say to participate in a conversation about it. ...I really wouldn't know what to talk about or where to begin.* ***(Independent adult)***

> *I never really understood and I always felt that I was wrong in my interpretation.* ***(Independent adult)***

Unlike Rejectors, they are open to the idea of engaging with museum pieces and works of art, but feel that the opportunity has passed them by.

> *It is nice but how I see it and how other people see it I find it very confusing. Some of it I just can't make sense of it, but it is interesting.* ***(Independent adult)***

Outstanding needs

Product development

These visitors are looking for exhibition or display themes that are relevant to them. This might include local interest and human stories that would enable them to connect with the objects or images on display on a personal level.

> *...the old Manchester and miners ... something like that would interest me. Like you can relate to it can't you with it being in Manchester.* ***(Independent adult)***

> *...what Bolton was like with its factories and its mines and its steel works 100 years or more ago and how people lived at that time and their homes and their clothing.* ***(Independent adult)***

> *I would love to ask the artist what inspired them to do that but they don't tell you.* ***(Independent adult)***

In terms of delivering information about the objects and images on display, Resistors are looking for additional support to bring pieces to life. This information needs to be delivered in an engaging way and might include extended themed captions, introductory tours, interactive displays and special events

> *... there is not enough history about the artists. You just stare at the piece and you only get the artists' name.* ***(Independent adult)***

> *... I would rather have somebody show me around and explaining things to me.* ***(Independent adult)***

Services and facilities

Resistors are highly unlikely to enter a museum or gallery on their own accord, rather they need to be convincingly persuaded and given an impetus to give their visit a purpose. This impetus might be a specific event to attend or a personal invite from an individual.

> *I think that I would feel quite intimidated just to walk in on my own.* ***(Independent adult)***

> *I wouldn't say that I would set out to go but if I were asked yeah I would think about it.* ***(Independent adult)***

> *...if I was to come into this museum there would have to be a range of things that I wished to see and probably for a reason* ***(Independent adult)***

Communicating the proposition

Just as these potential visitors are unlikely to wander into a venue of their own accord, they are equally unlikely to pick up a piece of generic marketing print. Rather they need to be targeted directly through specific audience development initiatives. This might include personal invites to visit made to Resistors via ambassadors and community outreach initiatives.

> *...if you were invited to go I would be more inclined to go than turn up on my own.* ***(Independent adult)***

> *Into the shopping centre and take a small exhibition into the shopping centre and it would bring people over here. Say this is a taster come and have a look at the rest.* ***(Independent visitor)***

The tone of the marketing print and the information given needs to be carefully considered to ensure that it is accessible to individuals who have little experience of visiting museums and galleries. The language and imagery must be clear and relevant to them.

Simon Bose is doing something called and I cant even spell it "Participatory Sound Installation Exploring Community Through Voices". It is far too up in the air to me and means absolutely nothing. ***(Independent adult)***

I just don't understand that. The pictures of the fish thing. (Independent adult)

Audience development strategy

Nurture

Resistors are not opposed to the idea of visiting a museum or gallery, but they do need to be convinced that there is enough there of relevance to them and that information is delivered in a way that they can easily connect with. This will require developing resonant themes within displays and exhibitions and engaging interpretation.

These individuals need to be nurtured if they are to develop into visitors. Audience development initiatives such as Test Drive – whereby individuals are personally invited to take part in facilitated visits, comprising guided tours and special events, or group open days through community groups, would enable these visitors to overcome there fears and give them a purpose to visit their local venues. Communications need to be specifically tailored for this group and should seek to reduce the risk factor, using plain English to convince Resistors that there is something at their local venues for them.

10.5 REJECTORS

There are some people for whom museums and galleries will never be relevant.

Rejectors are actively hostile to the notion of engaging with museums and gallery. They are convinced that will never meet their needs. They do not need to visit because their needs are adequately fulfilled by other pursuits. They simply do not have room in their lives for visiting museums and galleries, and nor are their lives any the poorer for this.

Although, Rejectors appreciate that museums and galleries do serve a purpose in society, they lack even a basic interest in what museums and galleries might have to offer them.

> *I have no interest in it at all and I know that it is beautiful but I can't see me walking in and having a look around this.* ***(Independent adult)***
>
> *The thing is it is one of those things you cant change people. If they are interested in art they will go and search for it* ***(Independent adult)***

Museums are seen as dusty, extraneous places, whilst art galleries are held to be even less relevant to their lives.

> *The memory is of a stuffy place and I wouldn't like to go there again* ***(Independent adult)***
>
> *I have been there a few years ago now and it was so boring and I just didn't … even worse than museums and I have got no interest in art anyway… I just don't see what all the fuss is about.* ***(Independent adult)***

Rejectors feel that, should they be seeking an educative or enlightening experience in their leisure time, they can get a better and more enjoyable experience elsewhere. This might be via the television or through experiencing the real landscapes on their doorsteps.

> *Whatever museums can do the telly can do better and you don't have to get up.* ***(Independent adult)***
>
> *They [paintings] are beautiful and a lovely colour but is has to be real and these are not real.* ***(Independent adult)***

Independent adults in Carlisle believe galleries to be the requisite of city dwellers. They were sympathetic towards those people who live urban lives and have to visit art galleries to experience beauty; whereas they believe they are fortunate in having real beauty on their doorstep and can access it by going for a walk.

> *Not blobs of paint you know. Like down the road and we have the landscape* ***(Independent adult)***
>
> *I you want to escape the hustle and bustle of anywhere you come into the gallery, museum, library. I live out in the country just through Dalton and that is just me, I walk out of my door* ***(Independent adult)***
>
> *London they need to go and have a bit of escapism from the kind of lifestyles that they lead, but we have a bit more relaxed lifestyle up here* ***(Independent adult)***

While Spiritually motivated current atenders are aware that a visit to a museum or gallery can be a relaxing and inspiring experience, these individuals perceive visiting as hard work and tend to look to other pursuits to when seeking relaxation.

> *When you do get time off you want to relax and whether that is by walking, or sitting on the beach, or by having a drink* ***(Independent adult)***

Audience development strategy

Individuals in this segment are highly unlikely to visit museums or galleries, nor should it be assumed that their lives are lacking anything in not doing so. Attempts to engage Rejectors would be costly and are unlikely to net worthwhile results.

11 Conclusions

North West Hub museums and galleries do not represent an homogenous group. There is little consistency across the proposition they offer to existing and potential attenders and, as a consequence, their audience profiles differ from one another. However, collectively, they are succeeding attracting True New Users and children. Therefore, the Hub overall is meeting PSA1 and PSA2 targets. Local authority museums are already attracting C2DE visitors.

Some venues are already performing well in terms of attracting a representative cross-section of the market within their catchment area. Others, especially the art galleries, have further to go in terms of altering the profile of their visitors so that it is a more accurate reflection of their local population.

Attracting true new users is the main challenge for these venues.

The factors deterring potential visitors at present are:

- Lack of awareness
- Negative perceptions of the offer
- In some cases a weak proposition

We have identified three groups of potential true new users that offer the greatest scope for genuinely developing sustainable relationships with new attenders - these are children; C2DE Parents and Social visitors.

It is believed that in building audience development strategies aimed at families, on the basis that families present a market segment with specific shared needs, the Hub can address PSA targets related to True New Users, C2Des and BME audiences, whilst also boosting the overall numbers of visitors from the attenders and intender groups. This is because a high profile family strategy reaches a large potential market which crosses many socio-demographic strata.

The challenge for the Hub is to ensure that there is an attractive proposition for this segment and very clearly targeted messages that reach both the customers and decision makers (parents) and the consumers and decision influencers (children).

For Social visitors it is important that Renaissance in the Region funding is used to make regional venues into transform regional museums into a source of local pride and curiosity in order to stimulate re-discovery. In some cases this simply requires awareness raising and information campaigns using mainstream media in order to reach a mass market. In others it requires investment in product development in order to bring the venues and collections up to date.

The audience development strategy for North West Hub therefore requires three main strands:

Product development

Hub venues need to prioritise re-displays and up-dating of collections, and in some cases buildings. The image of anachronistic, irrelevant places needs to be shrugged off and venues need to be seen to emerge into the twenty first century in order to combat the negative perceptions of non-attenders.

Priority should also be given to projects to develop modern facilities such as toilets, cafes, shops, education spaces.

Programme development that introduces a more dynamic programme, specially targeted events, partnerships with other agencies should also be prioritised.

Organisational development

Hub museums need to develop into modern, outward-facing, user-focused organisations. This means developing a culture of customer care, child friendliness, community engagement. Priority should be given to projects that focus on staff training and awareness, community consultation and partnerships.

It may be necessary for venues to prioritise Hub funding on the development of outreach departments and resources.

Market development and penetration

High profile, mainstream communications aimed at a mass market is needed to combat the issue of low awareness. It is important for regional museums to connect with local people as a source of pride and curiosity. This means that the Hub needs to invest in broadcast advertising and promotions as this is the only way people in C2DE groups will recognise that they are being targeted.

Families in particular also need to be targeted through schools, for added endorsement, and through child-focused communications material, supported by events and programming, so that children recognise that their needs will be met.

Outreach work aimed at *Resistors* should focus on making collections virtually and physically accessible beyond the museum buildings and on stimulating group visits through such initiatives as *Test Drive* and specifically-focused projects.

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