

# The Visitor Engagement Cycle:

The Data-Informed Role Museum Stores Play in the Visitor Experience in a Pandemic-Impacted World

MSA Forward

May 21, 2022



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## A note from IMPACTS Experience

It was a pleasure sharing research with the attendees of the MSA FORWARD Retail Conference and Expo! We at IMPACTS Experience hope that you will take the time to consider the findings, discuss them, and use them as tools to help propel your organization forward in achieving your business and mission objectives.

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# Agenda

1:30 pm

Welcome and introductions

1:45 pm

Inspiring attendance from offsite  
(Presentation + breakout discussions)

3:10 pm

Break

3:25 pm

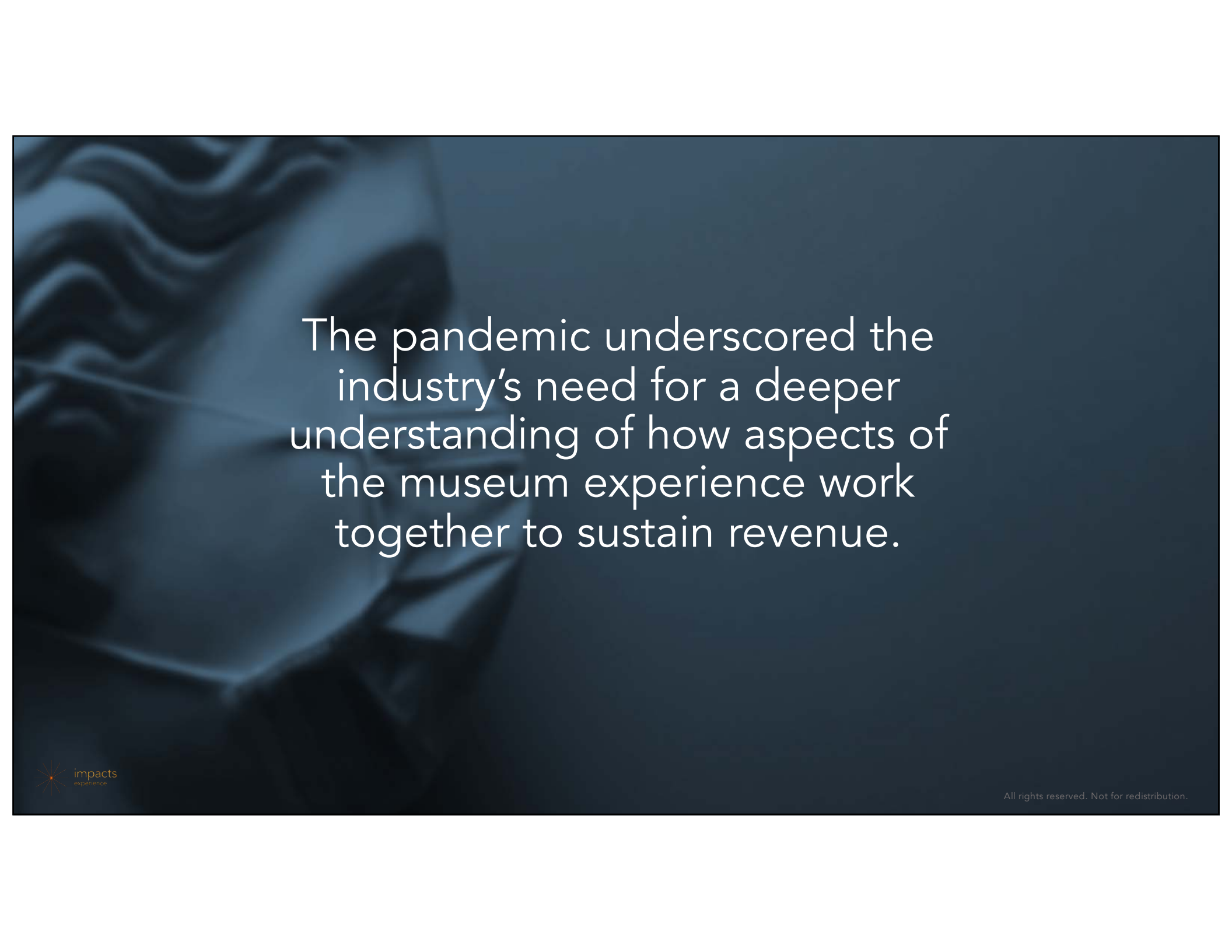
Creating memories while onsite  
(Presentation + breakout discussions)

4:50 pm

Wrap-up

5:00 pm

End  
(Thank you!)



The pandemic underscored the industry's need for a deeper understanding of how aspects of the museum experience work together to sustain revenue.

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# What role does the **gift shop** play?

Here's why **museum retail** is so important – and what retail leaders need to know right now.

# The Visitor Engagement Cycle

A framework for how people decide to visit and come back





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# Reputation

Inspiring attendance from offsite

# What influences the decision-making process?

Discretionary decision-making utility model

## US Composite

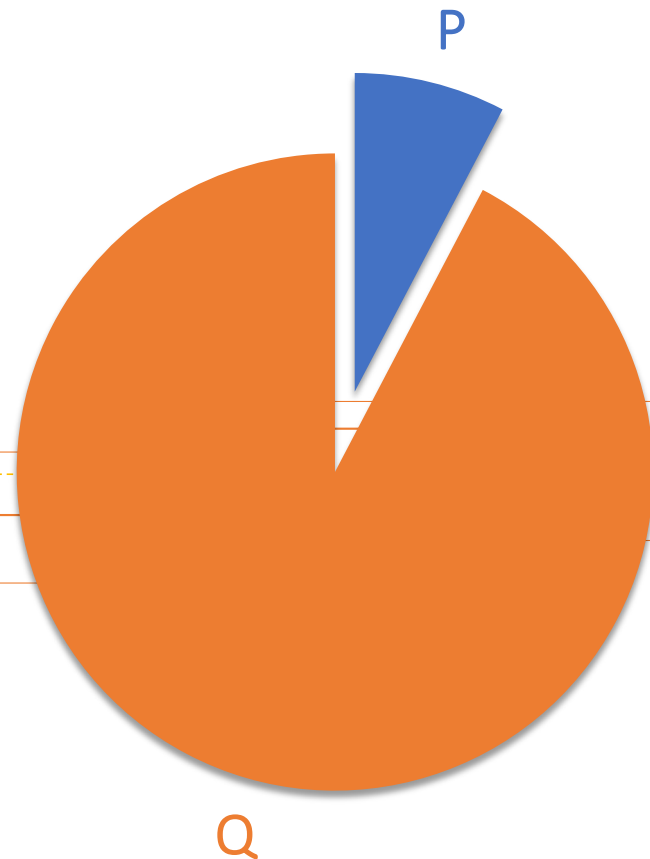
Utility	Index
Schedule	147.9
Cost	121.3
Travel distance (proximity)	120.5
Special events	118.8
<b>Reputation</b>	<b>117.5</b>
"Family-friendly"	116.4
Nightlife	110.0
Climate	107.7
"Friends and family"	105.3
Safety	102.6
Specific activity/attraction	101.9
Ease of access	100.2

## High-Propensity Visitors

Utility	Index
Schedule	203.5
<b>Reputation</b>	<b>181.2</b>
Travel distance (proximity)	129.5
Ease of access	120.4
Planning convenience	116.3
Climate	112.9
Special events	108.0
Specific activity/attraction	107.8
Travel loyalty programs	105.6
Nightlife	103.3
Fine dining	102.7
Cost	100.4



## What goes into reputation?



**P** = What  
you say  
about  
yourself

Paid media  
Advertising  
Broadcast  
Cable  
Radio  
Online  
Cinema

**Q** = What  
others say  
about you

Trusted sources  
Peer reviews  
Word of mouth  
Interpersonal  
Social media  
Earned media

**Q** (the coefficient of imitation)  
has a value **12.85x** greater than  
that of **P** (the coefficient of  
innovation).

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What people say about you is  
**12.85x** more important than  
what you say about yourself  
(or your gift shop).

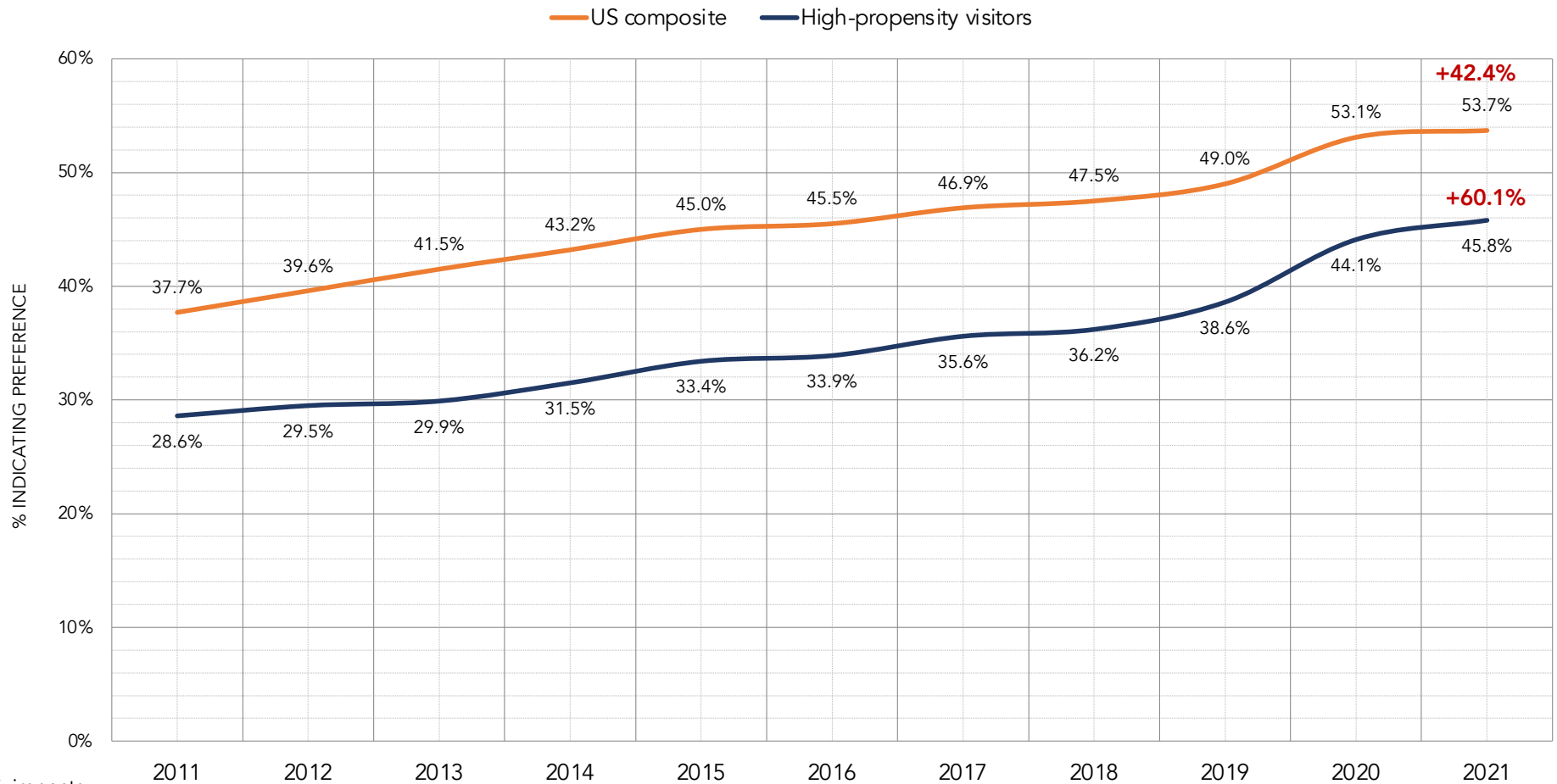
Get people **talking.**

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It's one thing to get  
folks **talking**.

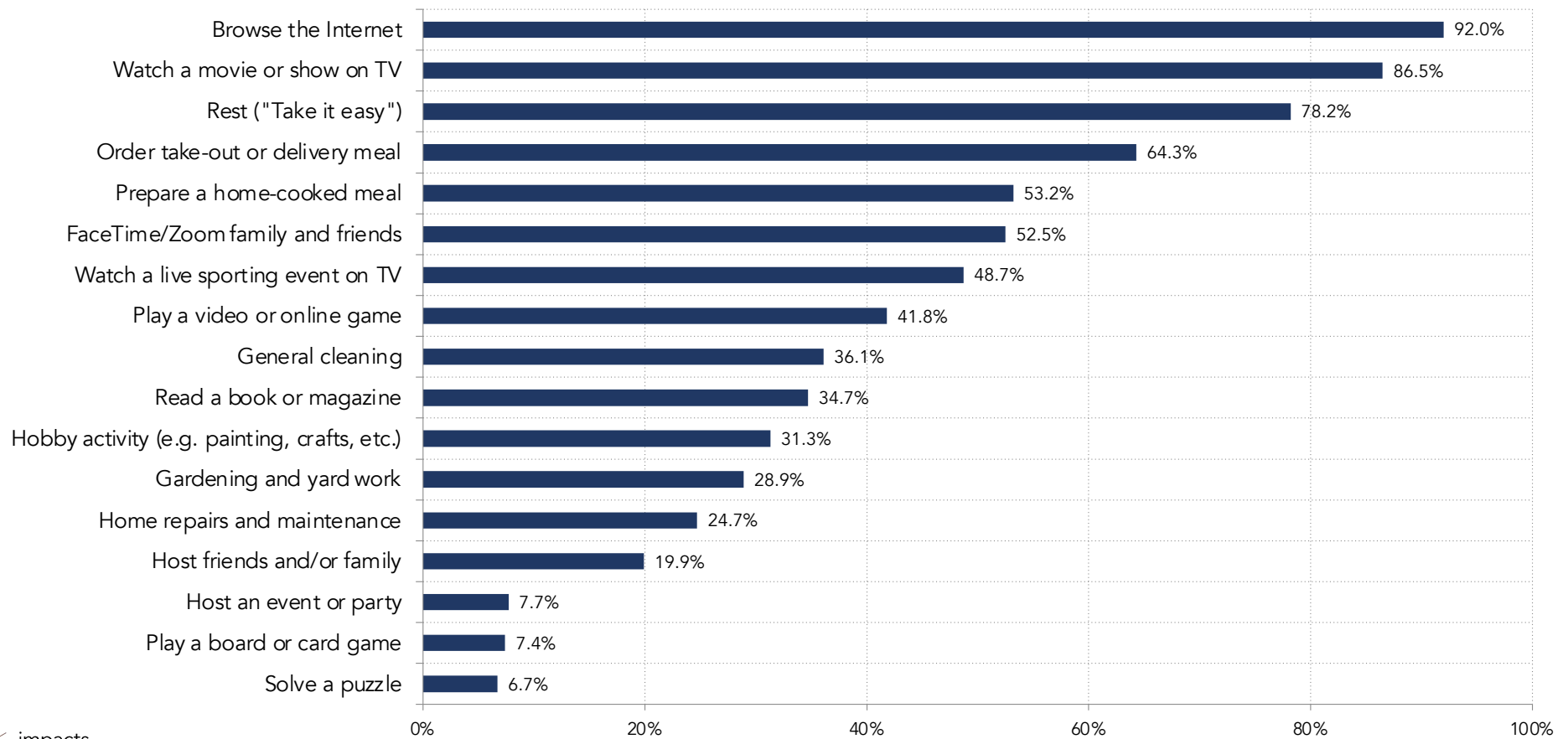
**A growing challenge is  
to also get them **moving**.**

# "Stay home" during weekend preference



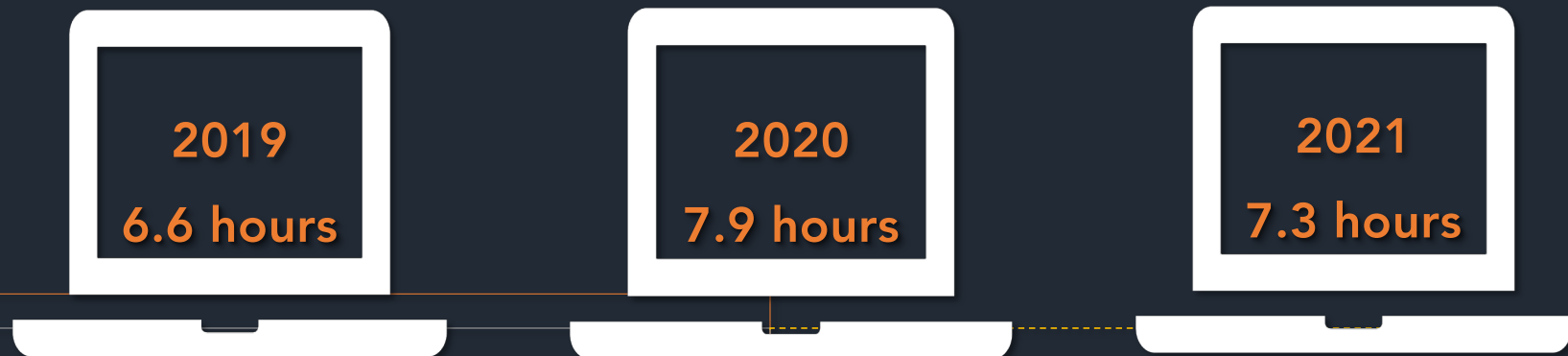
# Home-based activities

Among respondents preferring to stay home, EOY 2021



Americans are spending **more time online.**

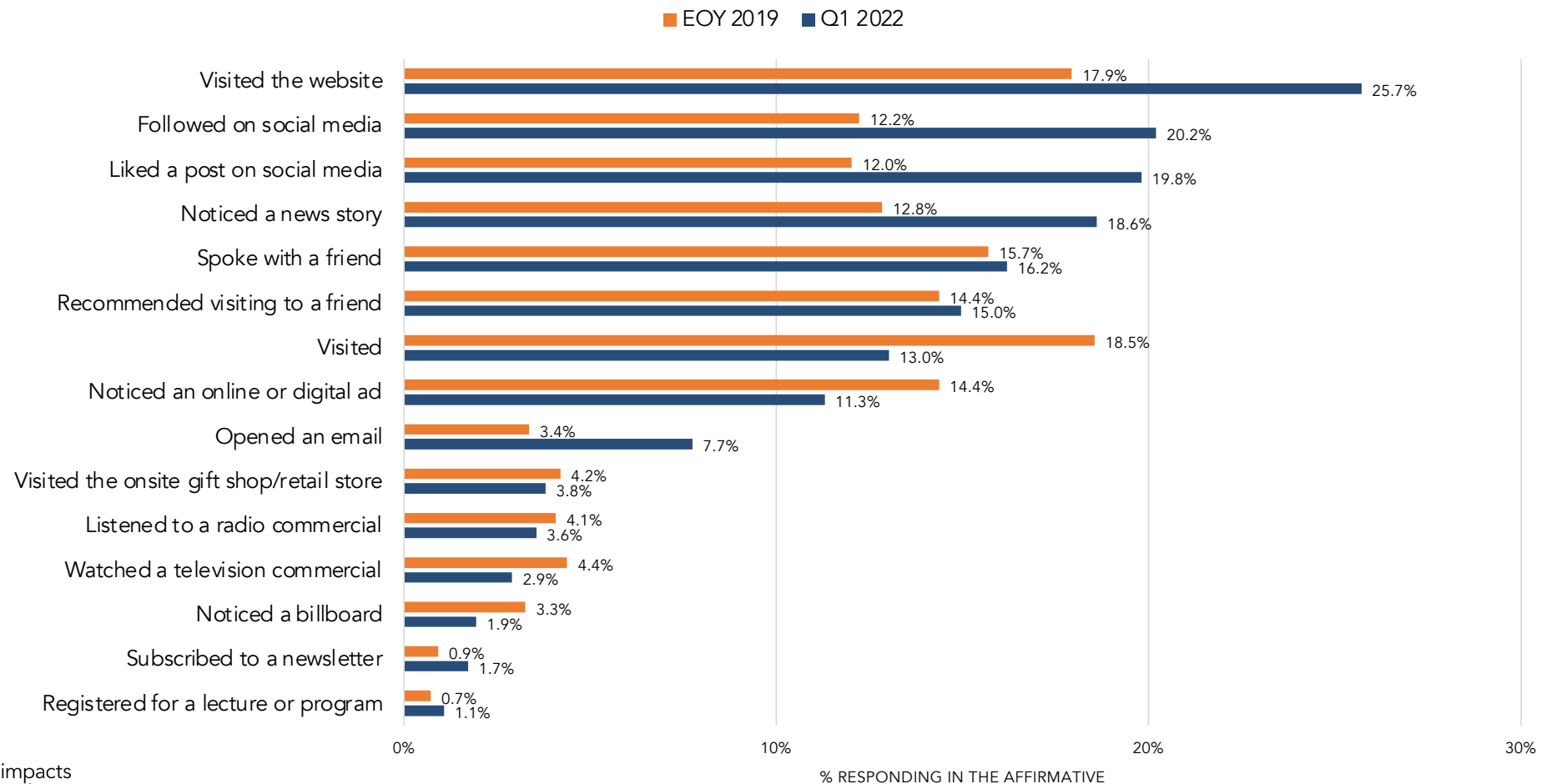
Hours on digital platforms/day:



But does this mean more people are  
spending time engaging and interacting  
with **museums** online?

# "In the past year, have you [...] in relation to the organization?"

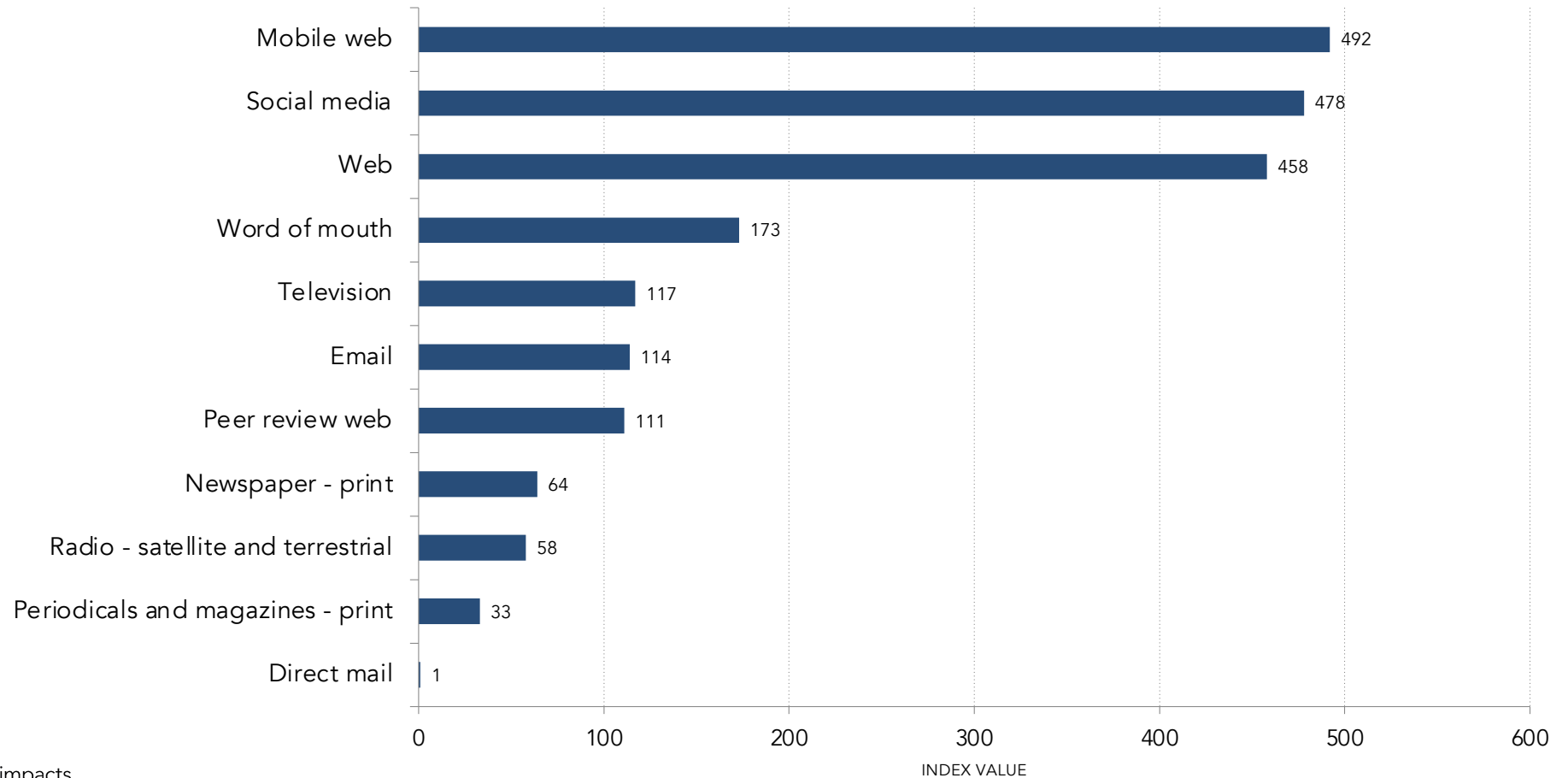
US adults, EOY 2019 and Q1 2022 comparison





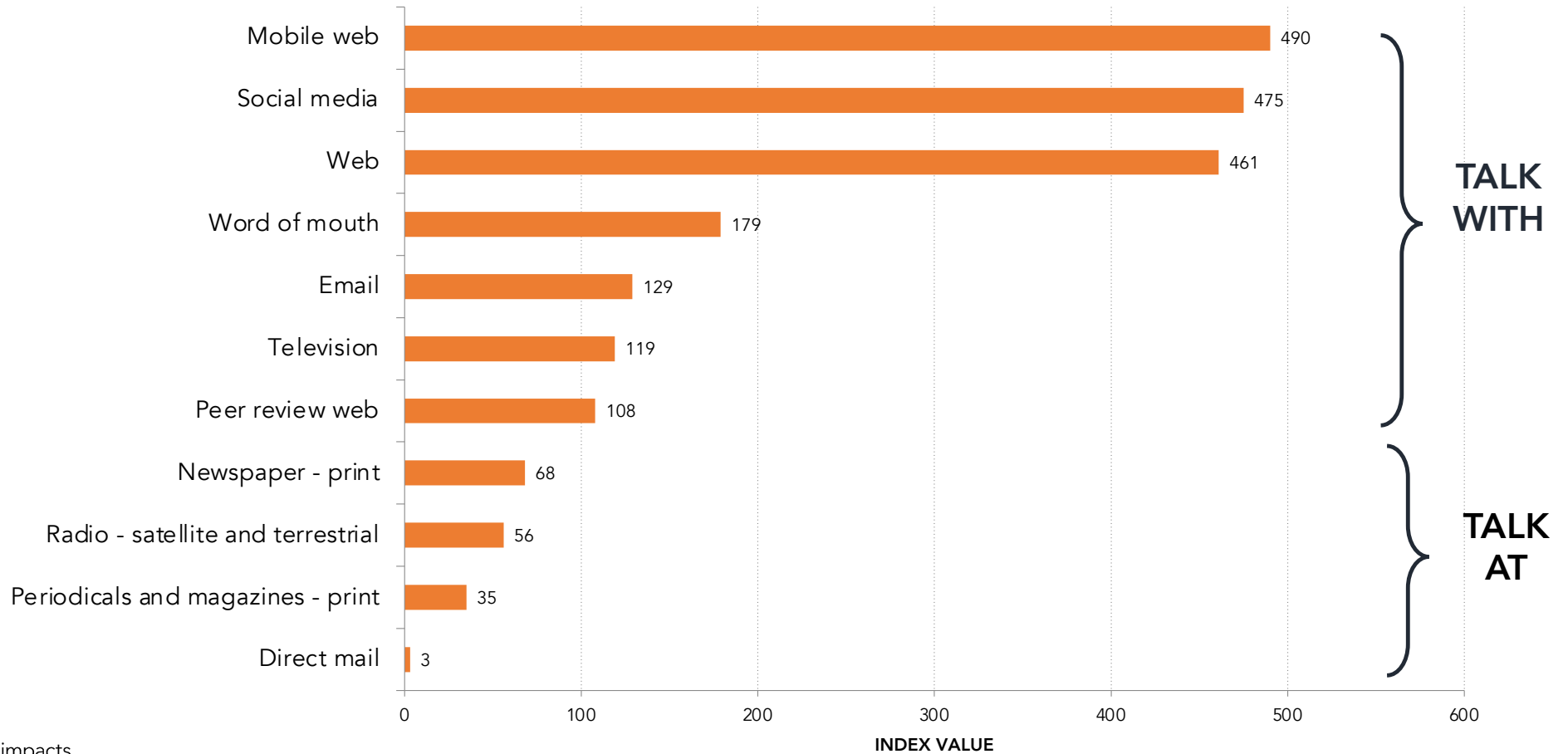
# Sources of information for high-propensity visitors

US exhibit-based organizations, Q1 2022



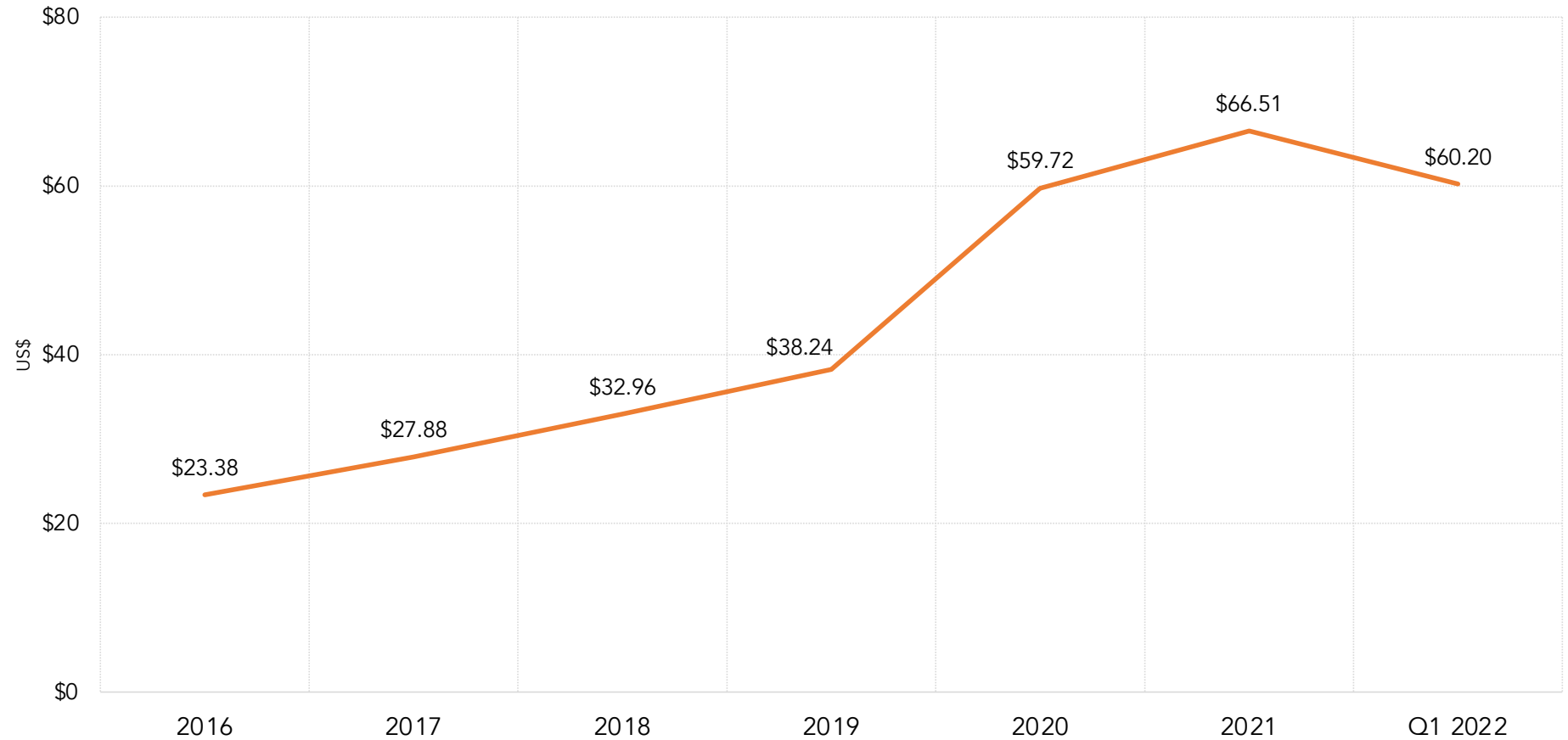
# Sources of information for museum retail store visitors

Among visitors to US exhibit-based organizations who report visiting retail store, Q1 2022



## Per transaction online spending

All devices (desktop, laptop, tablet, smartphone, etc.); 16 US visitor-serving cultural organizations



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Meet your **audiences**  
where they are.

They are **online.**



What is it about the retail experience that can help **motivate a visit** and **elevate perceptions**?

## "What are the best things about the [museum retail experience]"

Lexical analysis by descending frequency of mention  
81 cultural organizations with retail stores, EOY 2021

RANK	DESCRIPTION	INDEX
1	Unique merchandise (only available at location)	200.5
2	Supporting the organization	114.5
3	Finding gifts for friends/family (adult)	106.3
4	Finding gifts for child	105.5
5	Friendly/helpful staff	100.7

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Museum retail  
experiences can help us  
reinforce **who we are.**

And also who we **want to  
be** and what **we stand for.**

Has the pandemic impacted what people report to be the  
**best thing** about the museum retail experience?



# "What are the best things about the [museum retail experience]"

Lexical analysis by descending frequency of mention

EOY 2019*	RANK	EOY 2021*
Unique merchandise (193.2)	1	Unique merchandise (200.5)
Supporting organization (103.5)	2	Supporting organization (114.5)
Finding gifts for adult (100.5)	3	Finding gifts for adult (106.3)
Finding gifts for child (97.1)	4	Finding gifts for child (105.5)
Friendly/helpful staff (94.4)	5	Friendly/helpful staff (100.7)
<b>Sale items ("discounts") (92.8)</b>	6	<b>High-quality merchandise (95.2)</b>
<b>High-quality merchandise (90.2)</b>	7	<b>Educational merchandise (81.6)</b>

\*EOY 2019 contemplates 92 organizations. EOY 2021 contemplates 81 organizations.

# "Supporting the organization?"

Let's talk about members.

**Members** are increasingly critical for pandemic recovery and a museum's financial health.



Have higher satisfaction



Often have greater giving propensity



Tend to be more mission-driven



Have pre-paid for their experiences



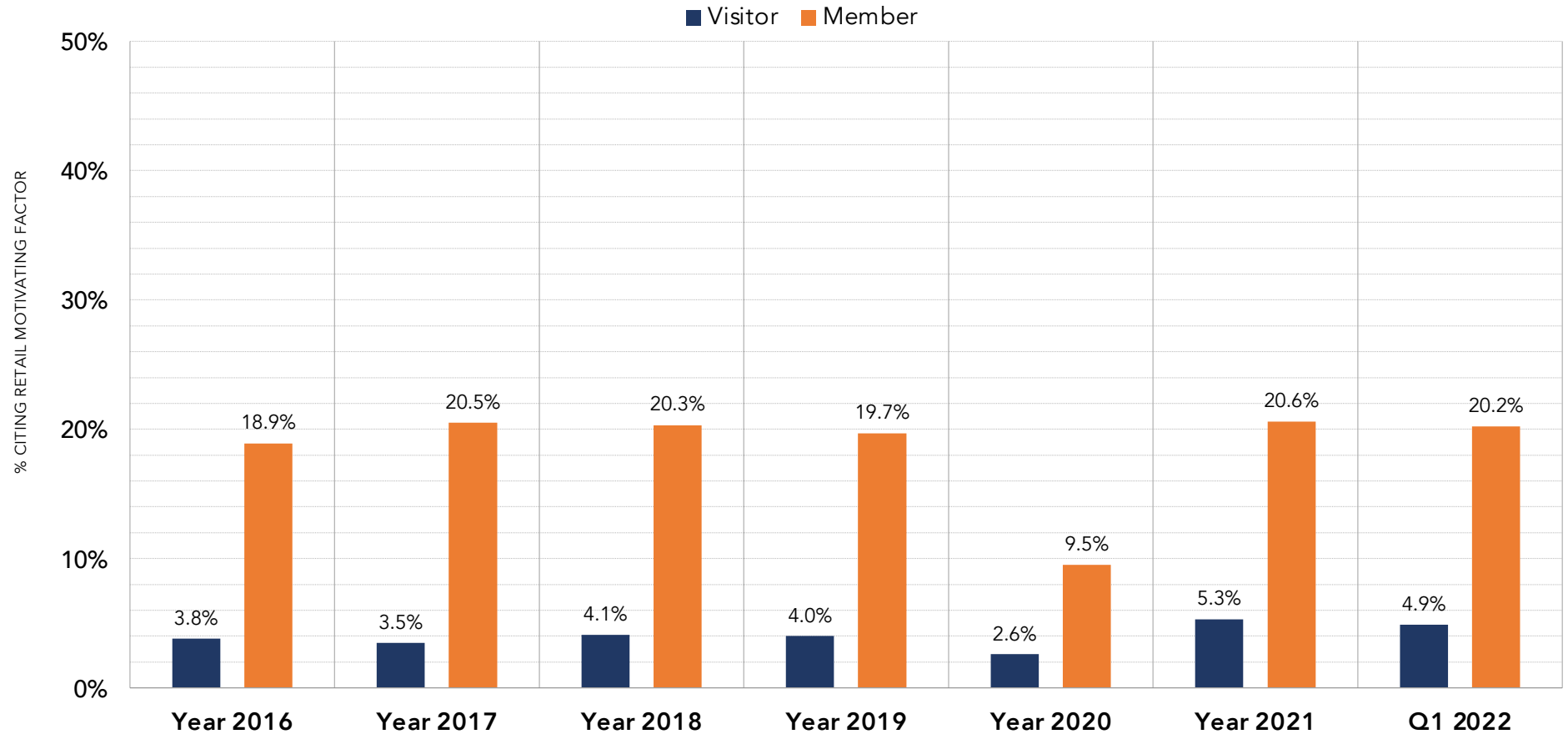
Are self-identified for easier targeting



Have a higher lifetime value

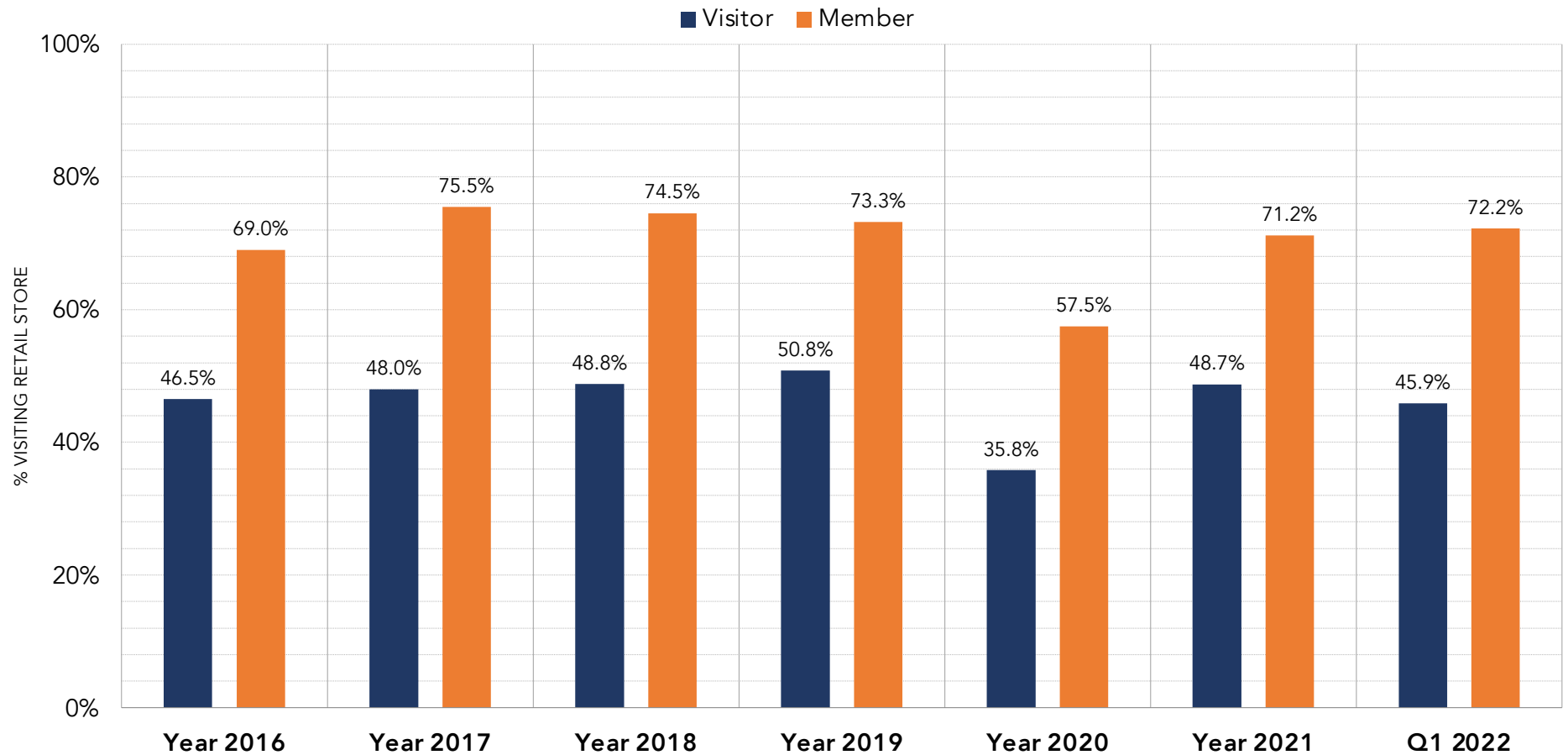
# Contributory visit motivation

Respondents citing retail-related factors motivating most recent visit  
16 US visitor-serving cultural organizations



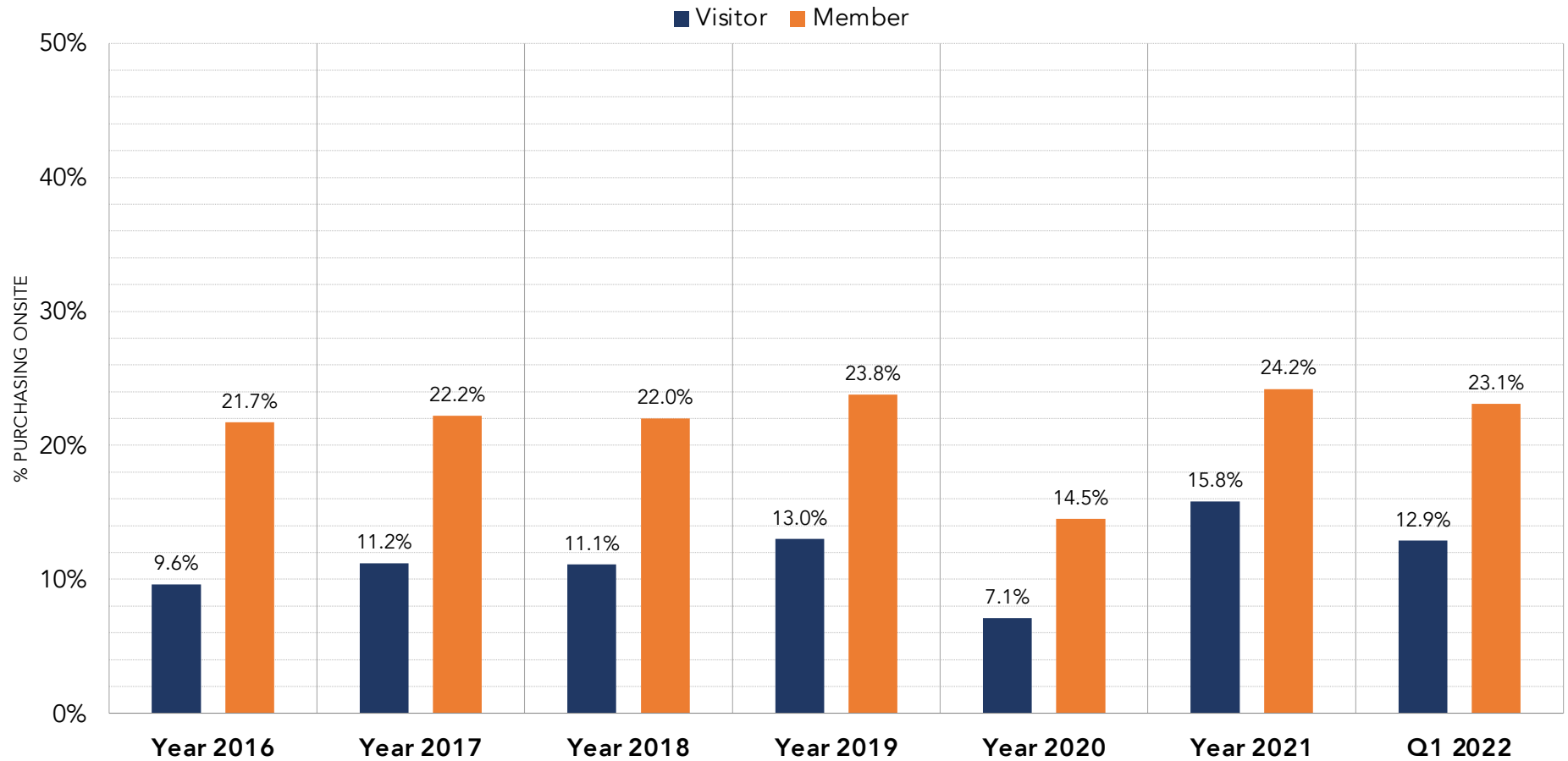
## Most recent visit onsite usage

16 US visitor-serving cultural organizations



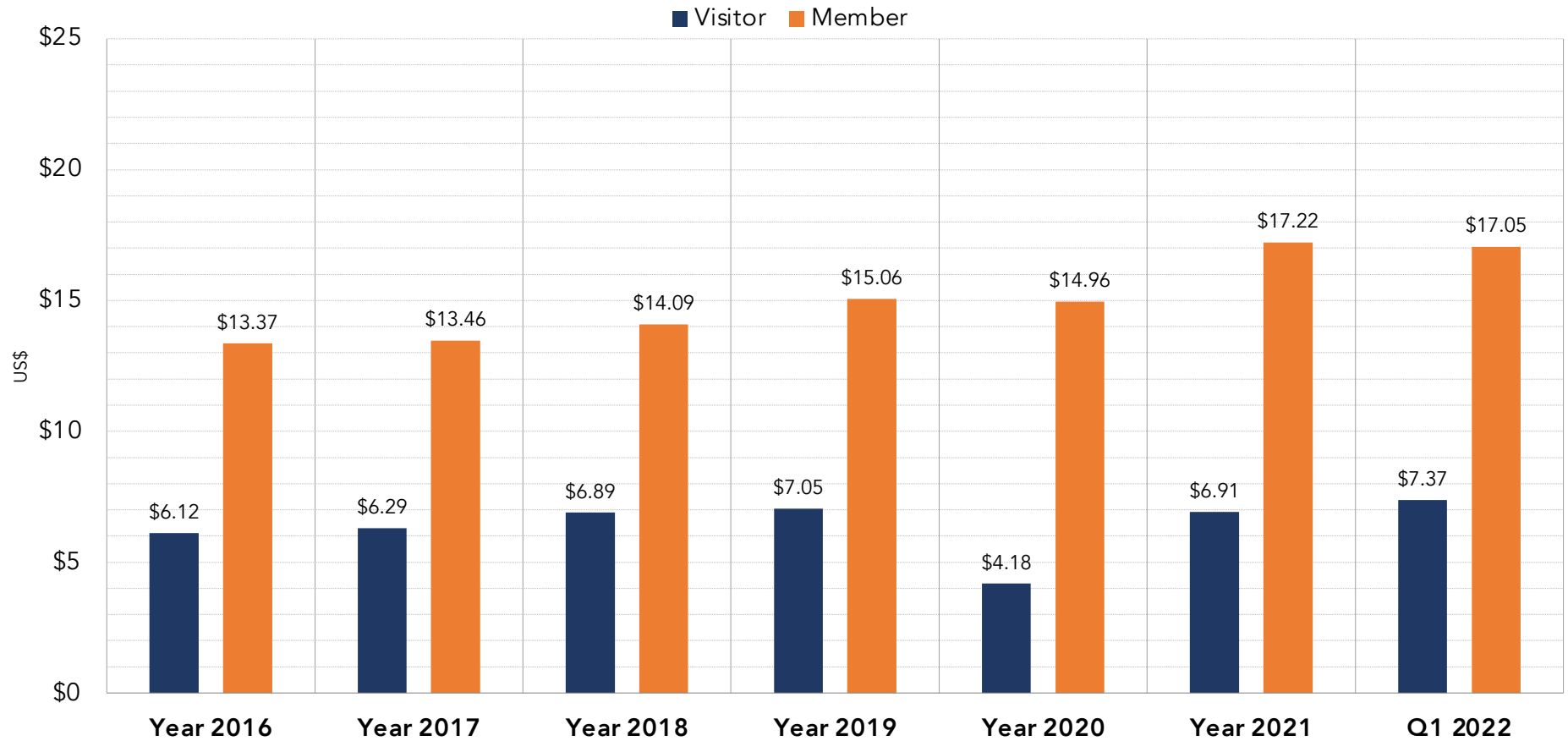
# Most recent visit retail purchase

16 US visitor-serving cultural organizations



# Per transaction onsite spending

16 US visitor-serving cultural organizations

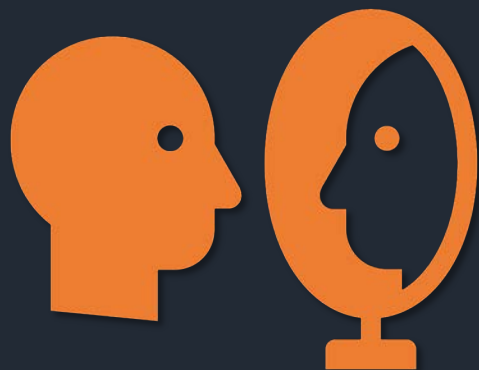


## Members are more likely to:

- Be motivated to visit a museum because of the gift shop
- Visit the gift shop
- Make a purchase
- Spend more money at the gift shop



Museum retail purchases can reflect and reinforce our own brands and self-perceptions.



This is often **especially powerful** among members.



# Inspiring attendance from offsite

## High-level takeaways

- Get people talking
  - Reputation motivates attendance
  - What people say about your museum (and retail experience) is 12.85x more important than what you say about yourself
- Meet audiences where they are – online
- Museum shops help reinforce who we are and who we want to be
- Retail experiences are important touchpoints and motivators for members
  - Members are increasingly important to a museum's long-term financial health



# Satisfaction

Creating memories while onsite

The more satisfied a visitor is,  
the more likely they are to...

**Return**

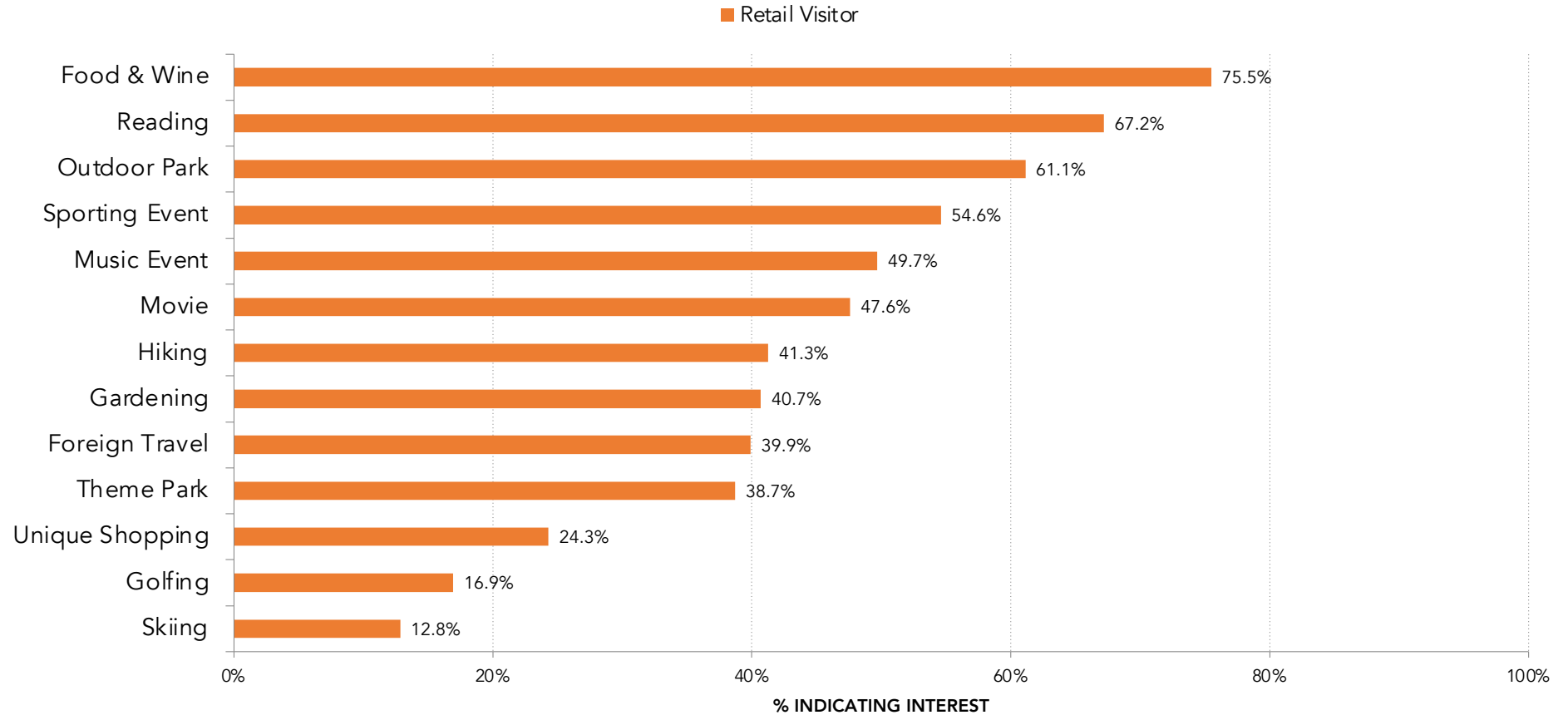
**Endorse**

**Support**

To satisfy visitors with retail offerings, it helps to know a bit about what they like to do in **their leisure time.**

# Preferred leisure activities by cultural participation

Among visitors to US exhibit-based organizations who report visiting retail store, Q1 2022



## Weighted contribution to overall satisfaction

EVALUATION CRITERIA	WEIGHT	%
Entertainment experience	0.2083870	20.84%
Favorability	0.1973655	19.74%
Admission value	0.1392858	13.93%
Employee courtesy	0.1058746	10.59%
Cleanliness	0.0839291	8.39%
Crowd control	0.0693879	6.94%
Parking	0.0685503	6.86%
Food service	0.0483722	4.84%
Education experience	0.0476664	4.77%
Retail	0.0311855	3.12%
<b>OVERALL SATISFACTION (COMPOSITE)</b>	<b>1.0000000</b>	<b>100.00%</b>

Oh no! Retail makes up only  
**3%** of guest satisfaction?

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Not so fast...



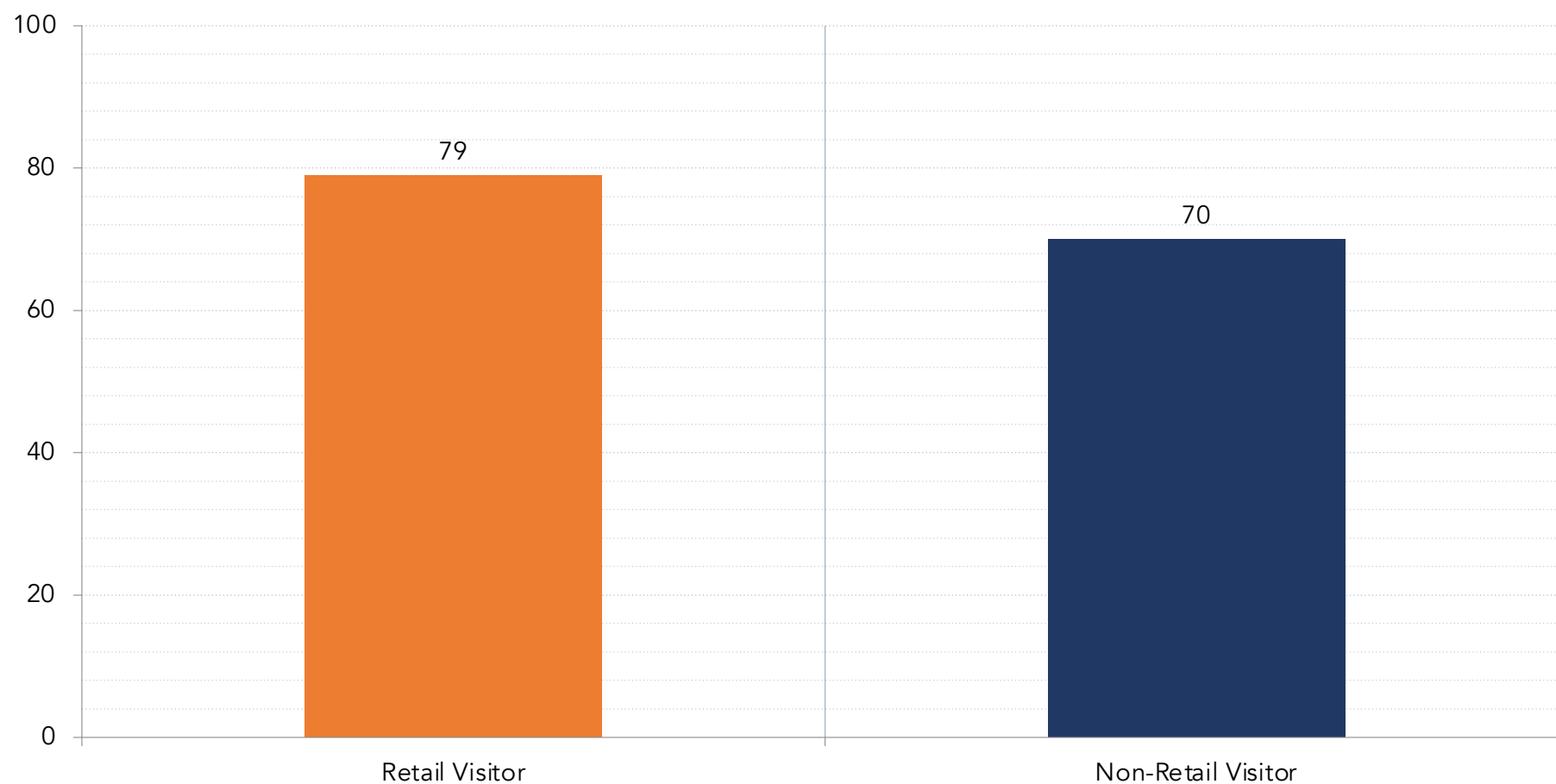
Let's consider what we know  
about the **24.6%** of museum\*  
visitors who visit the gift shop.

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**83.2%** say that it positively contributes  
to their overall satisfaction.

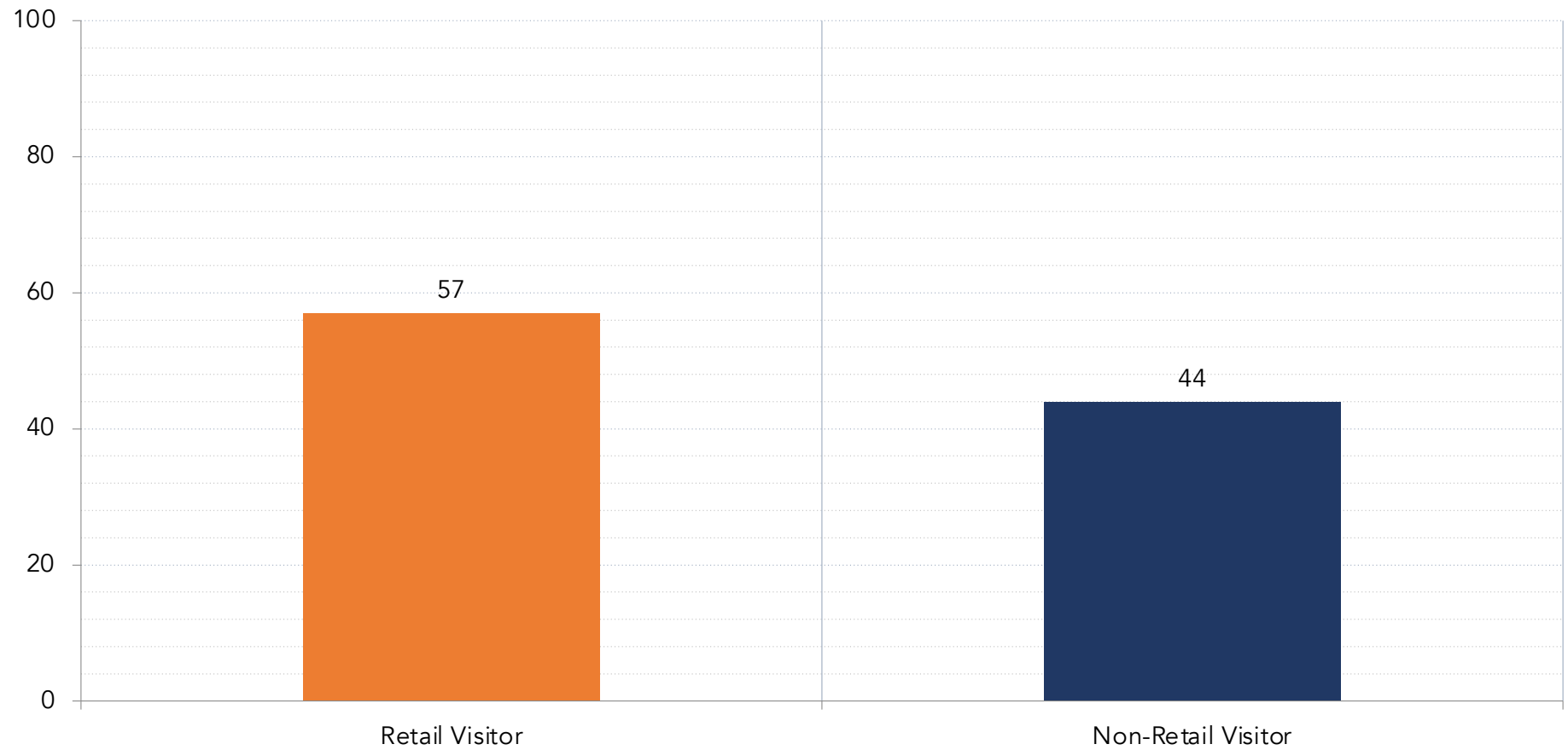
# Overall satisfaction

Q1 2022, retail visitor and non-visitor comparison, scalar variable (1-100)



# Intent to revisit within one year

Q1 2022, retail visitor and non-visitor comparison, scalar variable (1-100)



Guests who have a better experience are **more likely** to visit the gift shop.

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Retail operations provide a critical touchpoint for a museum's most valuable daily guests.



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Retail stores can provide the  
**exclamation point** for the  
onsite experience.

You are agents of  
**good** to **great**.

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## A museum retail superpower:

Commemorating and reinforcing  
**positive memories.**



Retail experiences play a critical role in solidifying future engagement and contributing to the **financial sustainability of museums.**

# Factors that comprise retail satisfaction

81 US cultural organizations with retail stores – Q1 2022

CONTRIBUTORY FACTOR	WEIGHTED VALUE
Design elements/aesthetic of the physical space ("atmosphere")	22.76%
Quality/uniqueness of merchandise	18.99%
Friendly/welcoming staff	13.22%
Clean/organized ("tidy")	7.46%
Availability/inventory of merchandise (not being "out" of item)	5.28%
Ample space ("room to move" and "not crowded")	5.22%
Knowledgeable staff	5.05%
Sufficient staff ("no wait to pay" and "easy to find help")	4.89%
Well-lit ("bright")	4.80%
Good value ("fair prices")	4.68%
Layout/wayfinding	3.53%
Ability to test/trial	2.07%
Sales and discounts ("deals" and "bargains")	2.05%
<b>TOTAL</b>	<b>100.00%</b>



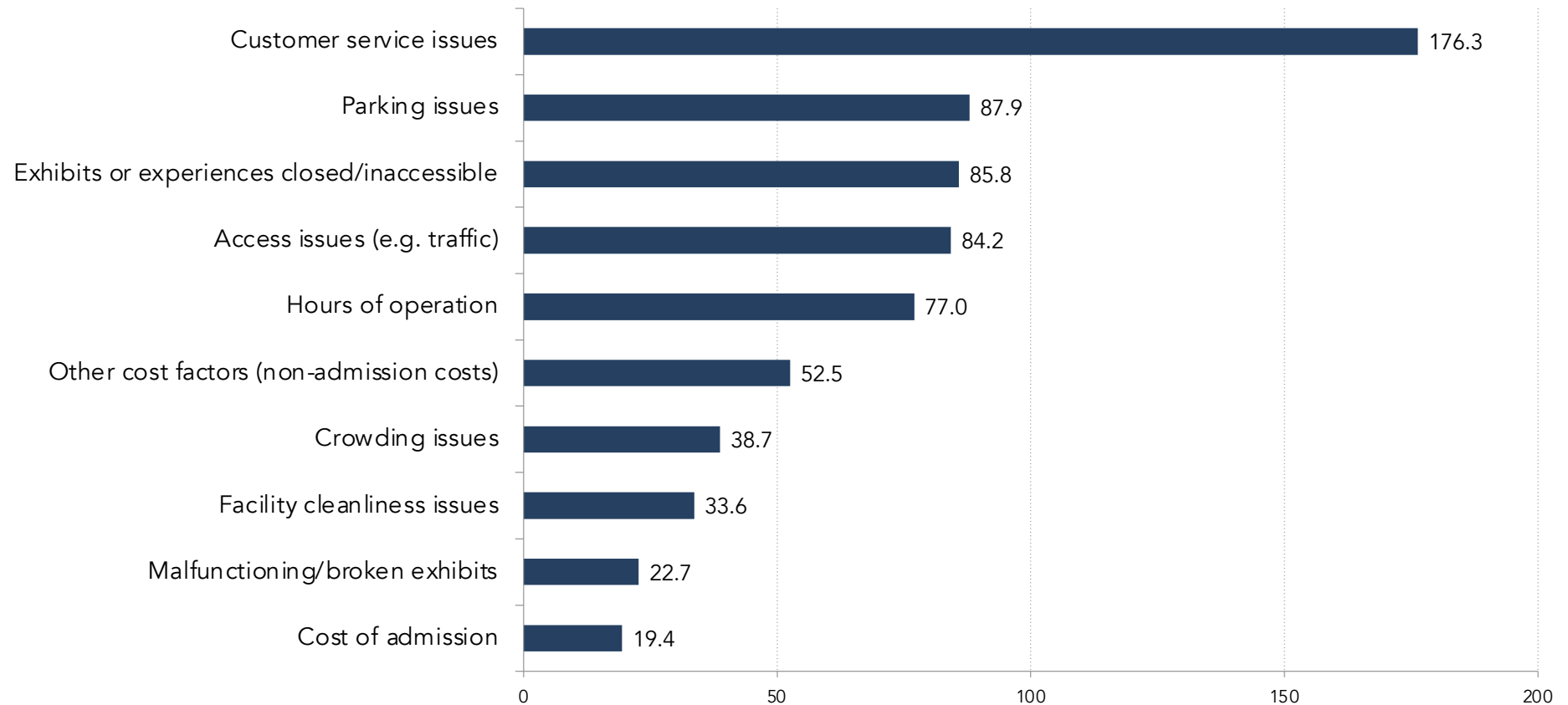


It's not only the merchandise.  
The **space and experience** matter, too.

But being satisfying also  
means not being *dissatisfying*.

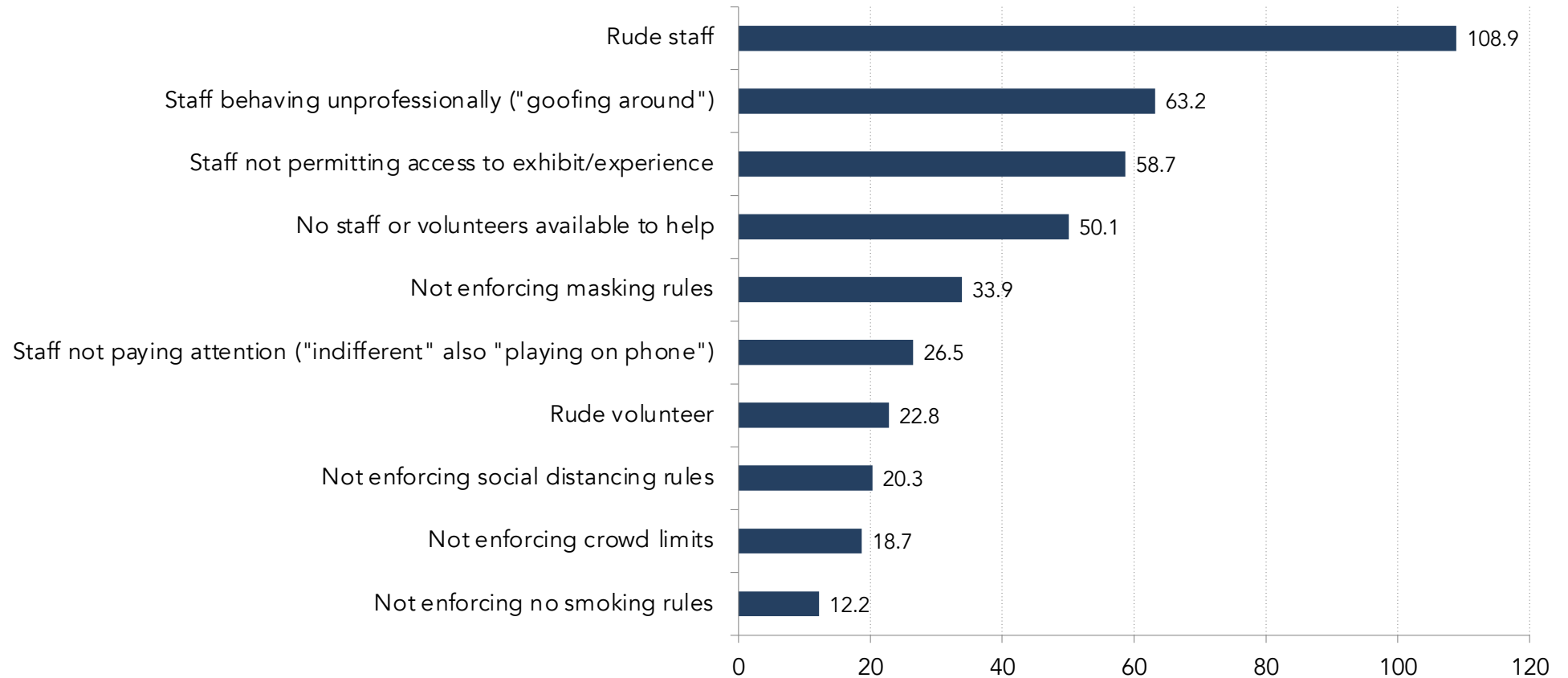
# Visitor dissatisfiers

"What factors contributed to your less-than-satisfying experience when you last visited ...?"  
Adult visitors to US exhibit-based organizations with the past six months, Q1 2022



# Visitor dissatisfiers: Customer service issues

Adult visitors to US exhibit-based organizations with the past six months, Q1 2022



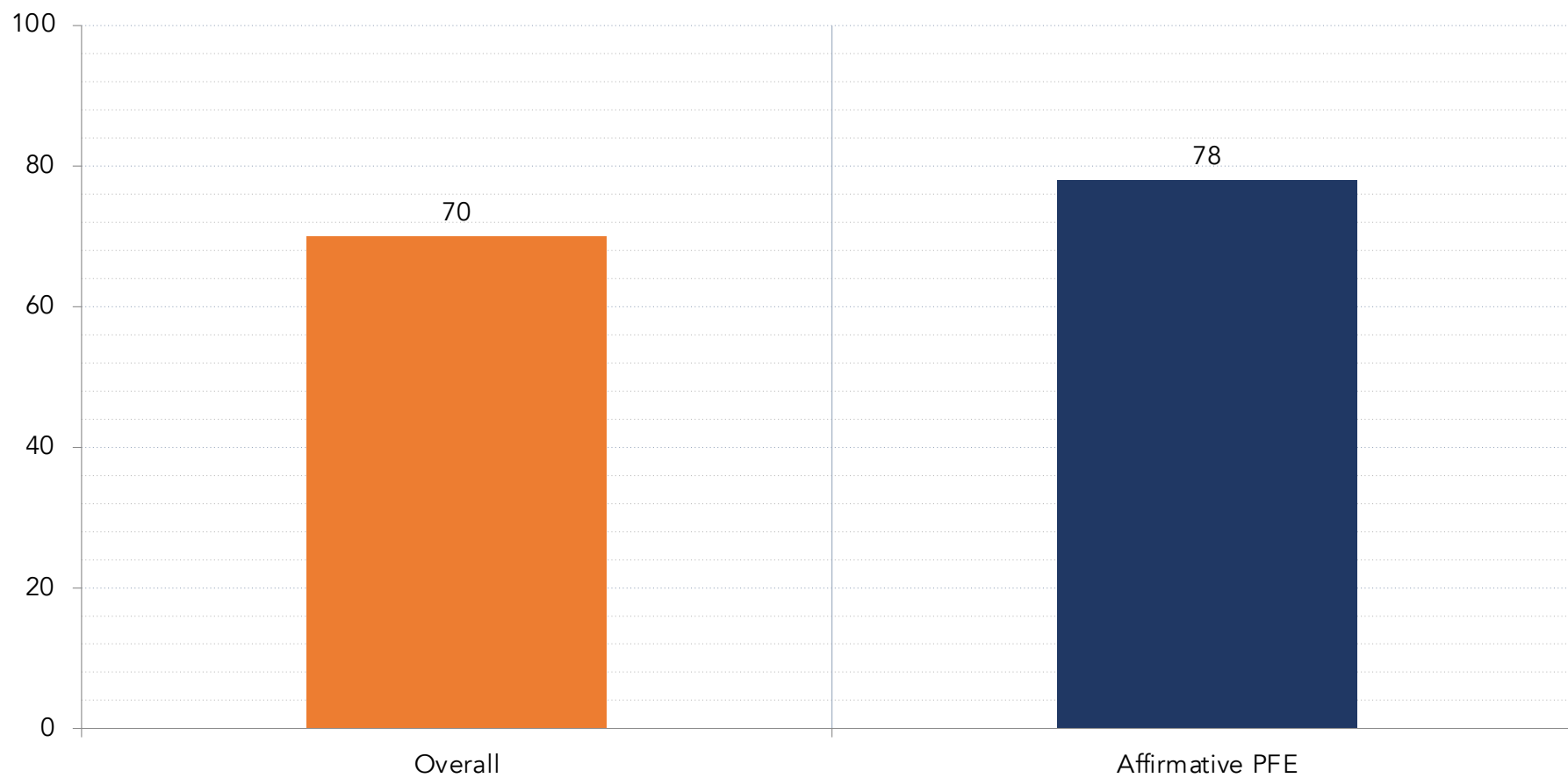
## Personal facilitated experiences

A PFE is a one-to-one or one-to-few interaction between a staff member or volunteer and an individual, couple, or small family.



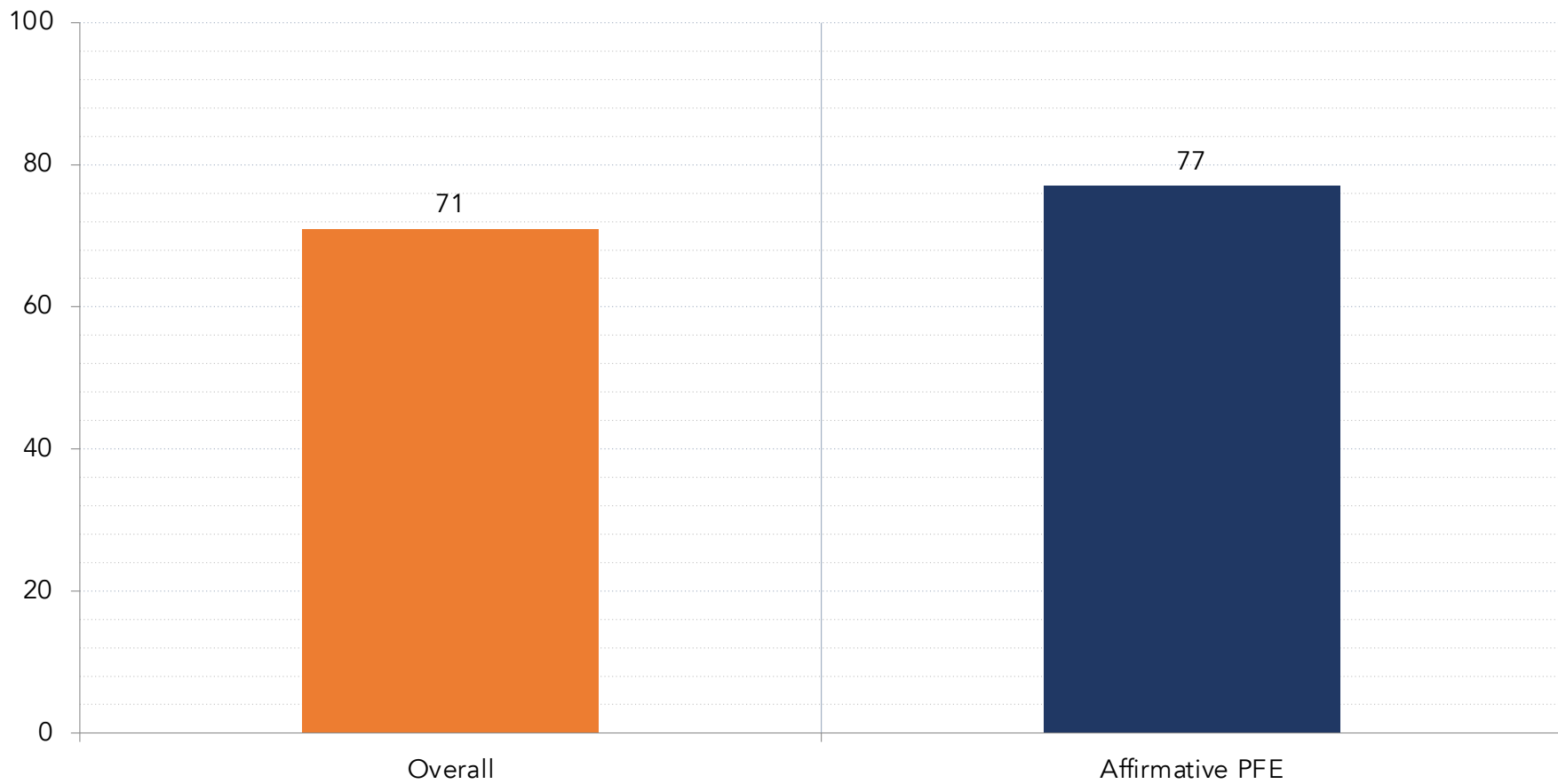
# Admission value

Q1 2022, 84 US exhibit-based organizations, scalar variable (1-100)



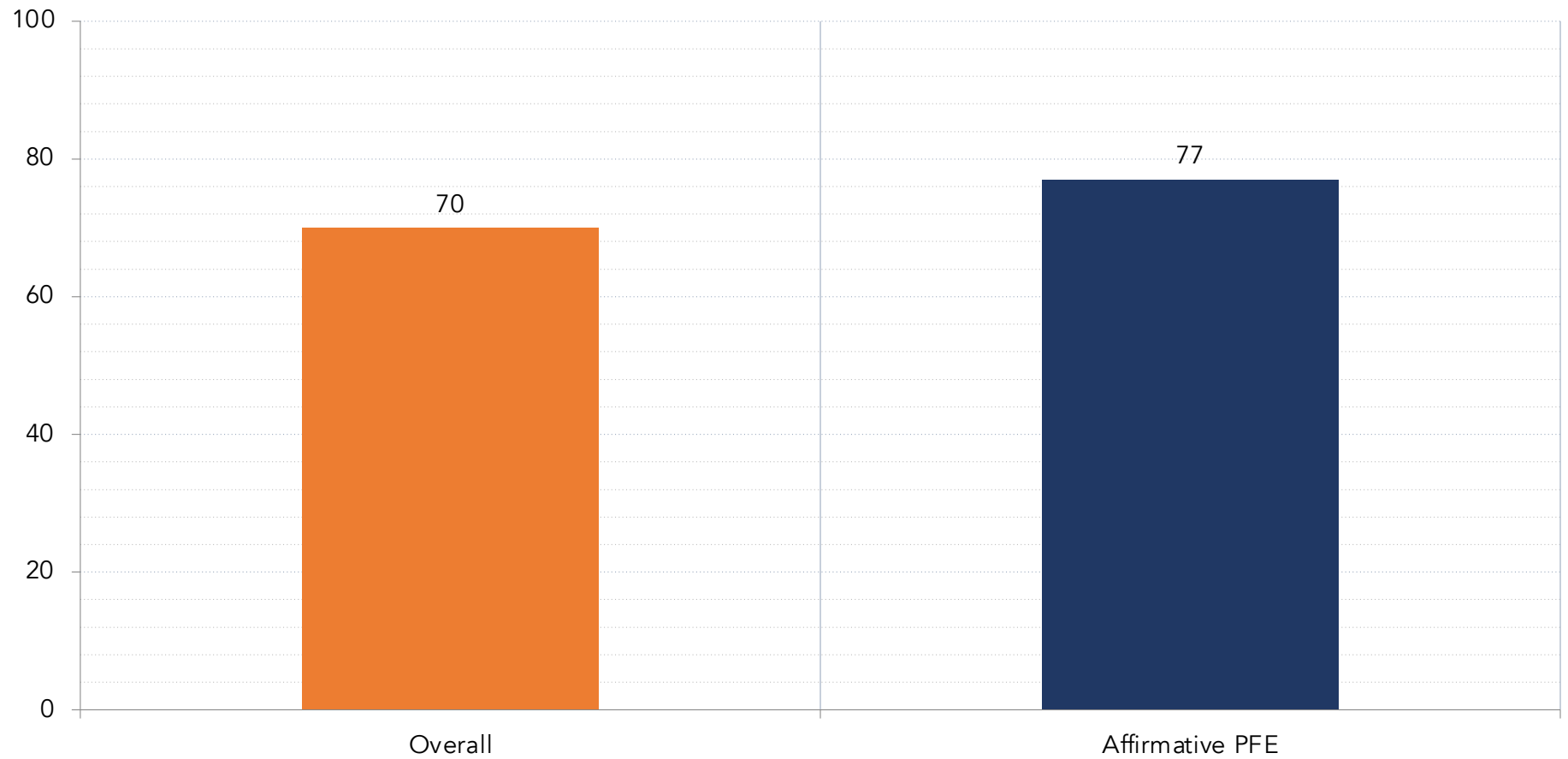
# Employee courtesy

Q1 2022, 84 US exhibit-based organizations, scalar variable (1-100)



# Entertainment experience

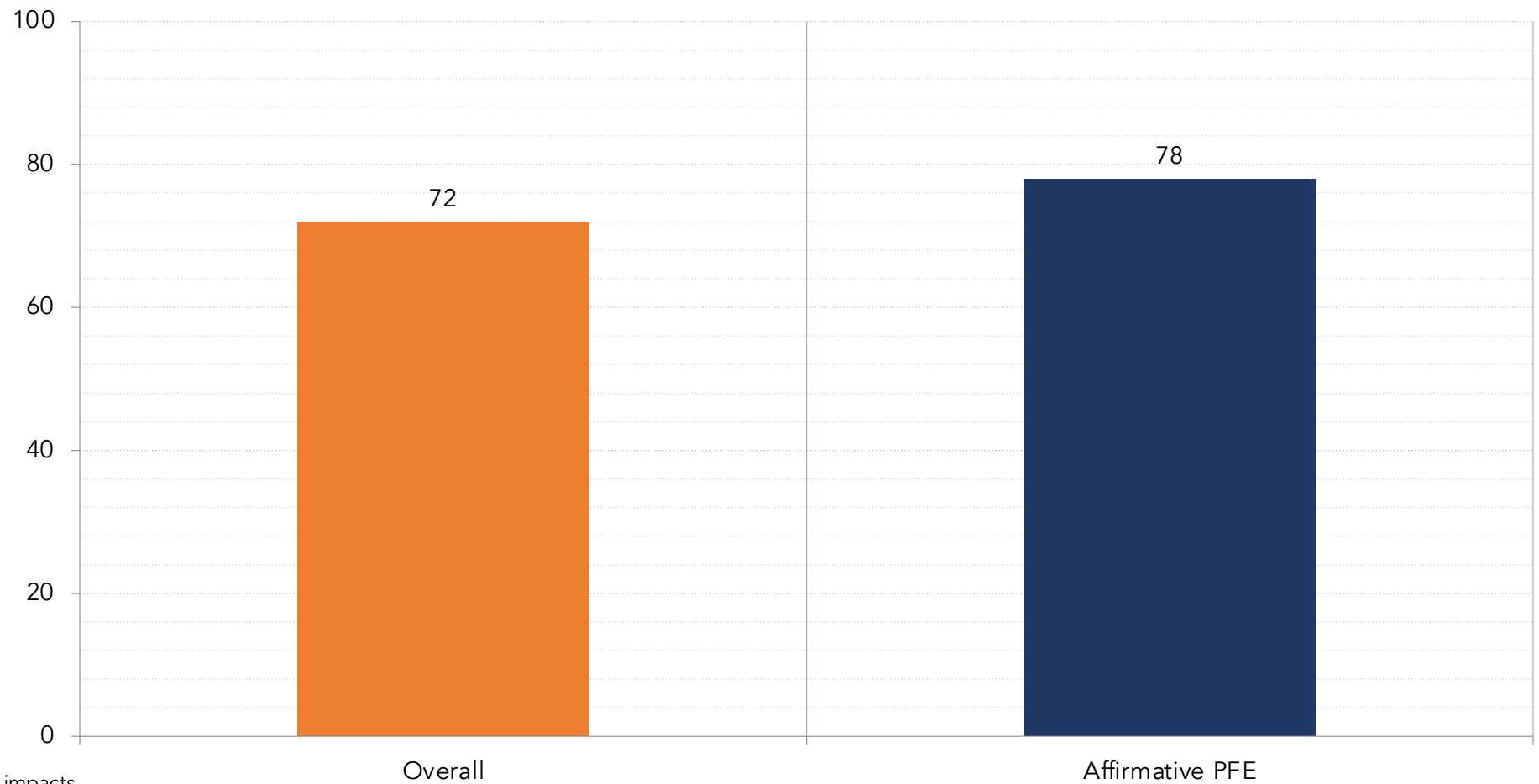
Q1 2022, 84 organizations, scalar variable (1-100)





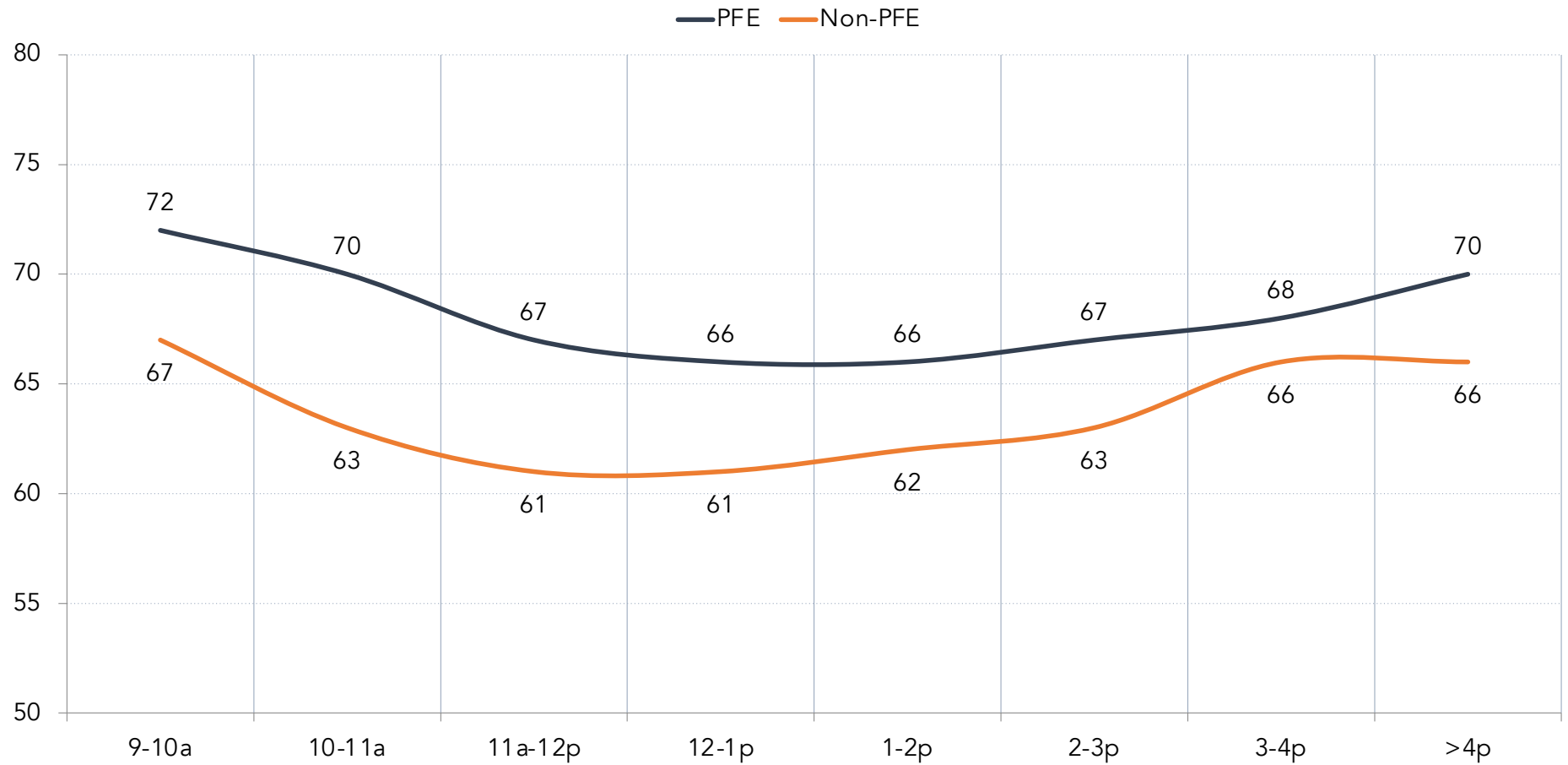
# Educational experience

Q1 2022, 84 organizations, scalar variable (1-100)



# Overall satisfaction by daypart

Case study of individual exhibit-based cultural organization, scalar variable (1-100)

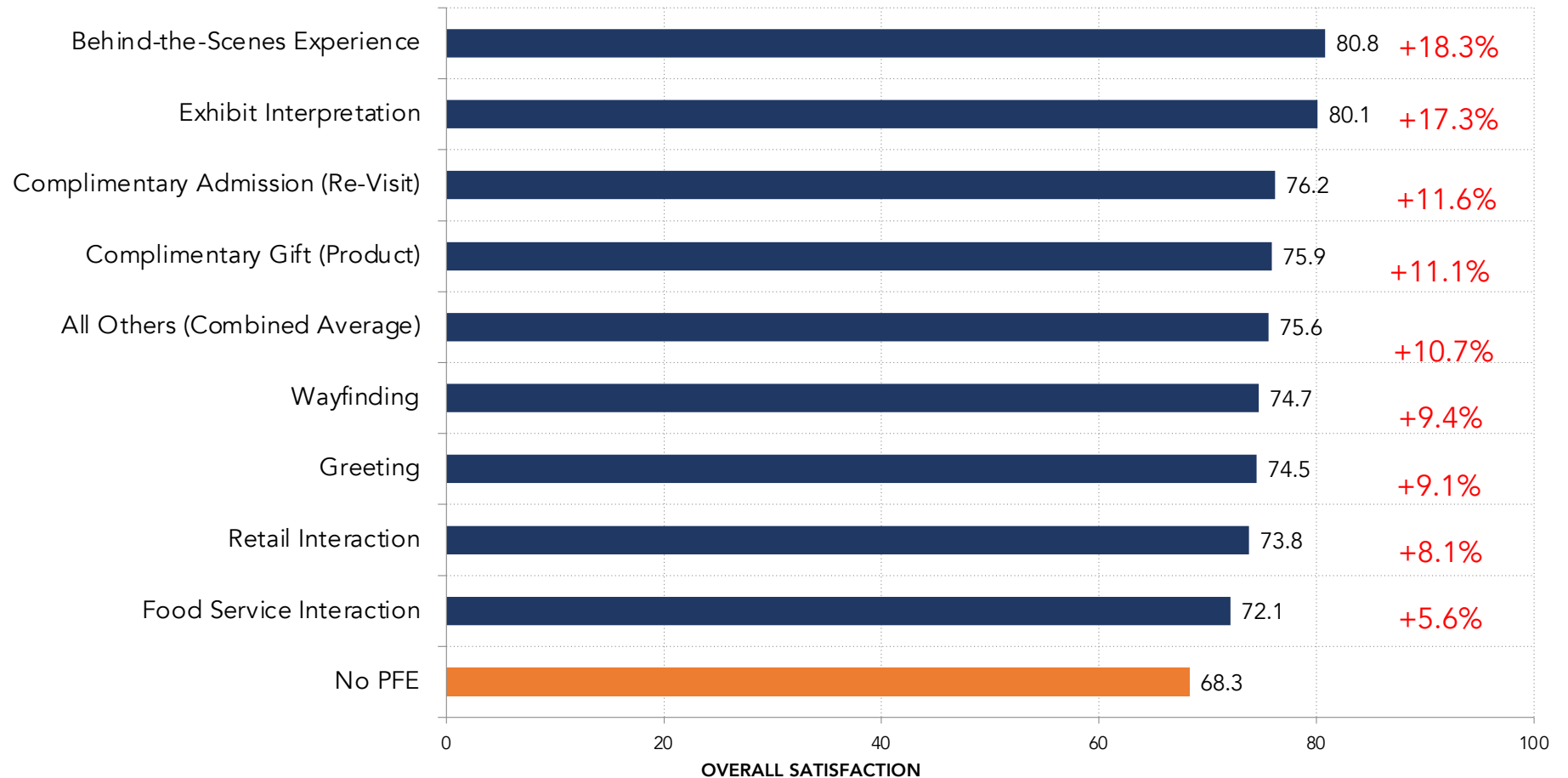




So how much, on average, does a positive and memorable **retail interaction** boost guest satisfaction?

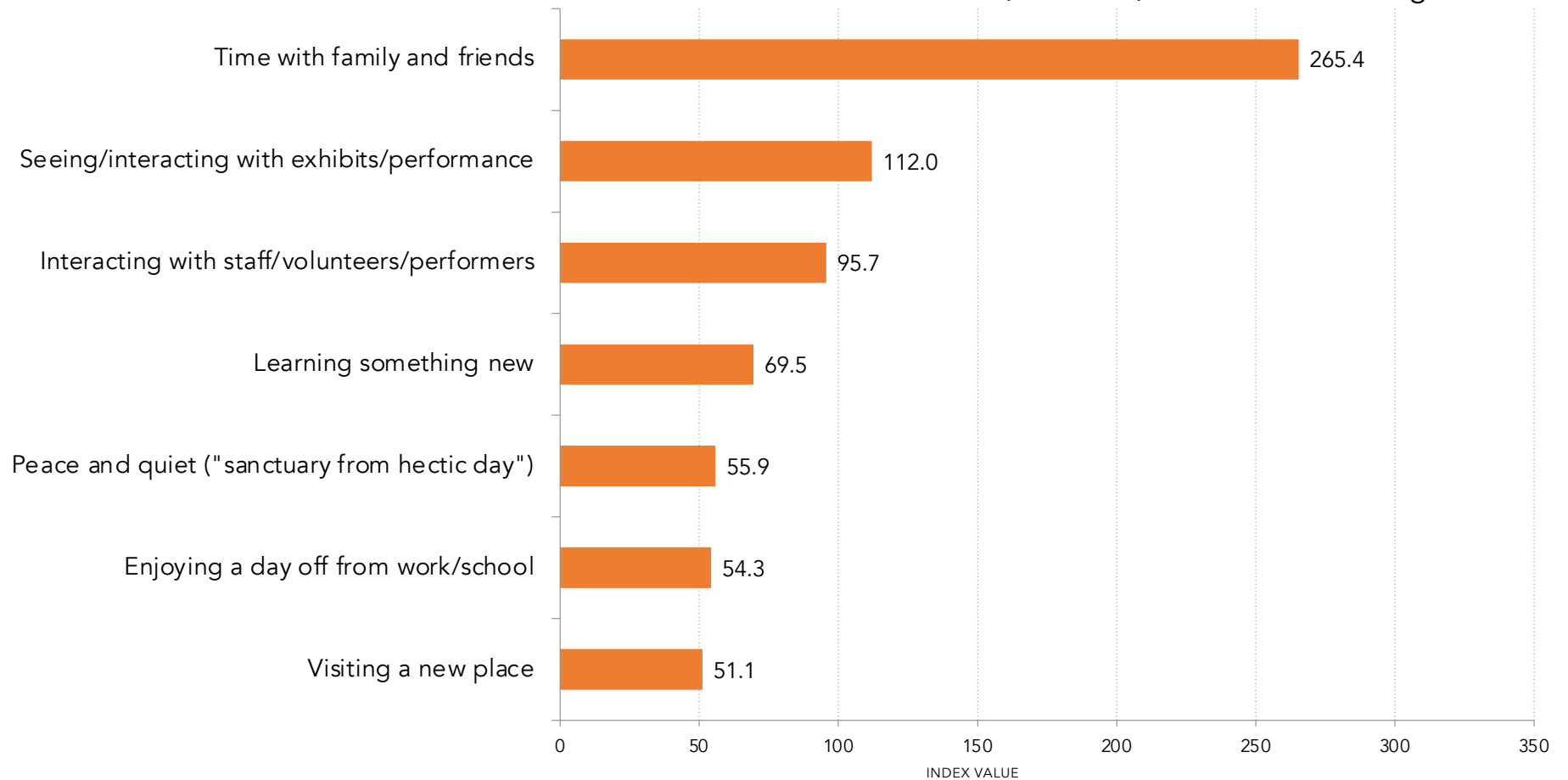
# Overall satisfaction by primary PFE descriptor

EOY 2021, US visitor-serving cultural organizations



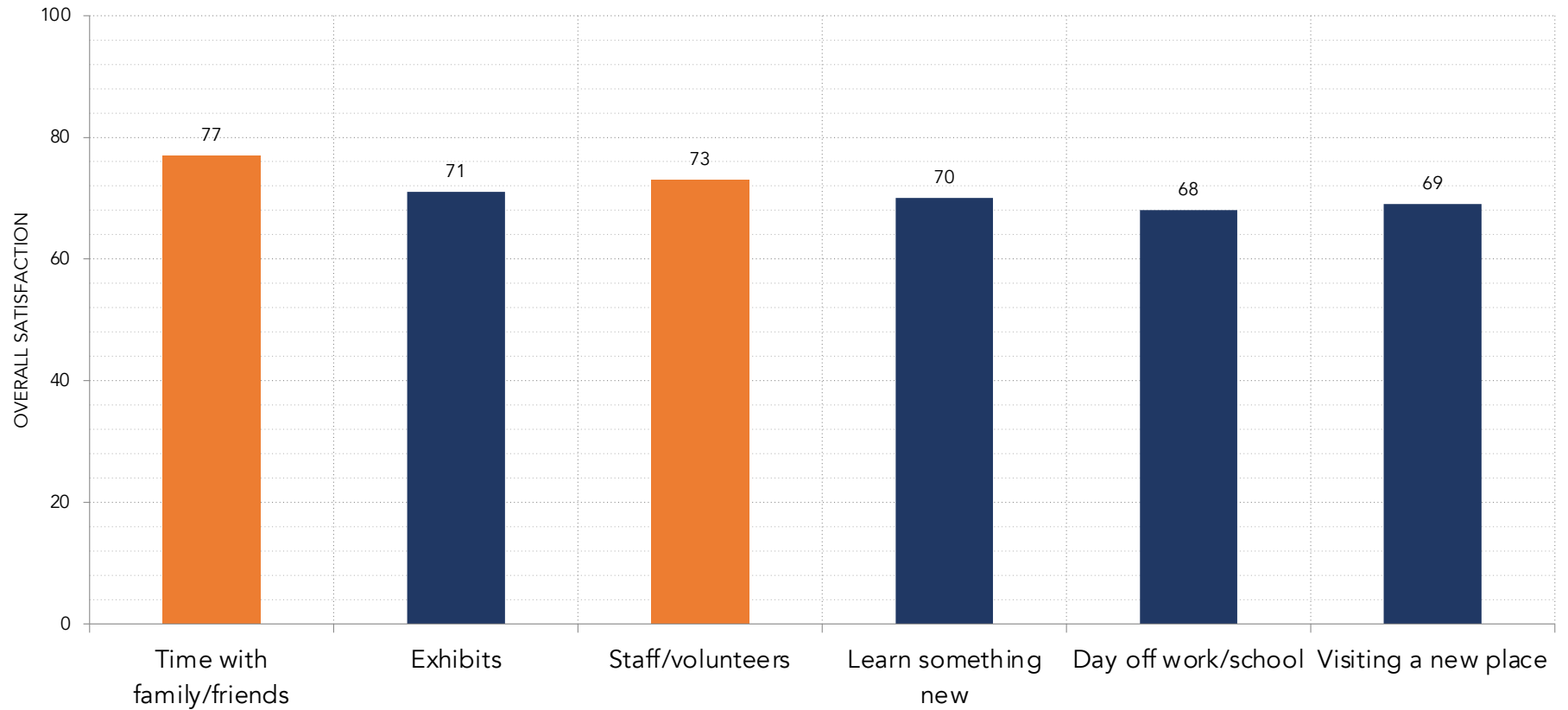
# What is the best thing about a visit?

With>what, Q1 2022, US exhibit-based organizations



# Overall satisfaction by best visit attribute

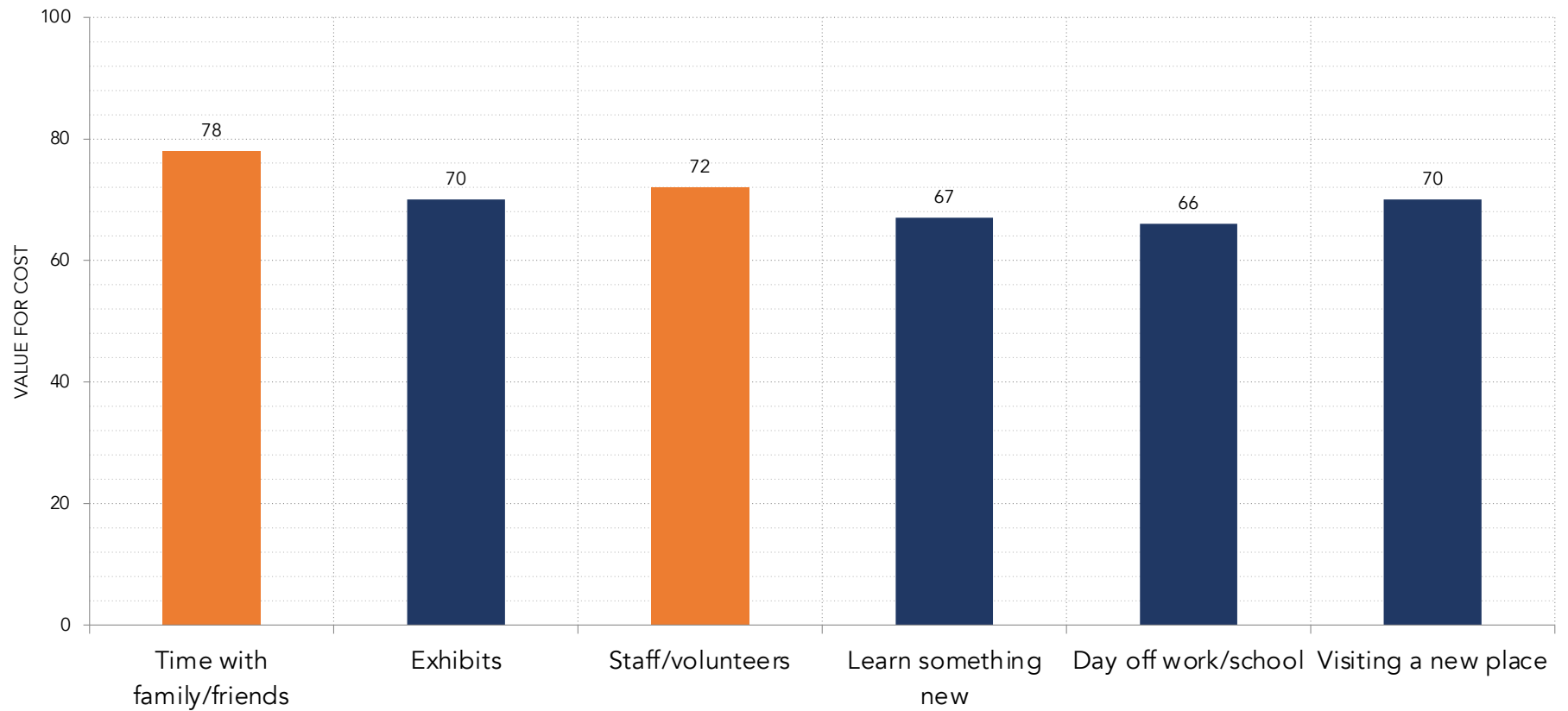
Q1 2022, US exhibit-based organizations



"THE BEST THING ABOUT A VISIT TO A CULTURAL ORGANIZATION"

# Value for cost by best visit attribute

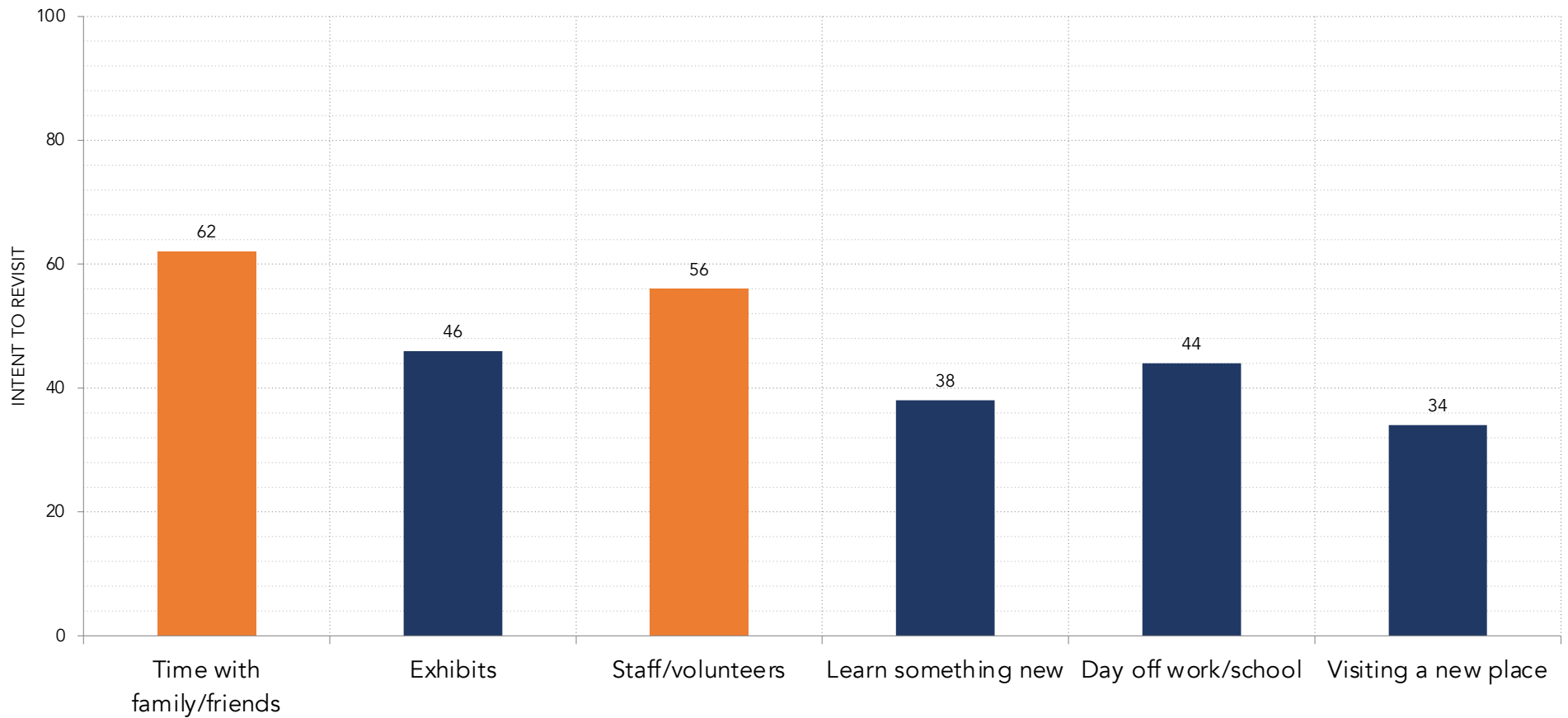
Q1 2022, US exhibit-based organizations



"THE BEST THING ABOUT A VISIT TO A CULTURAL ORGANIZATION"

# Intent to visit within one year by best visit attribute

Q1 2022, US exhibit-based organizations





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**You're not "just a store."**

You create and contribute  
to **meaningful moments** in  
people's lives.



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# Creating memories while onsite

## High-level takeaways

- Understand museum visitor interests to optimize offerings
- Retail is a critical touchpoint for a museum's most valuable daily guests
- Satisfied guests are more likely to return, endorse, and support the museum
- Retail superpower: Commemorating and reinforcing positive memories
- Atmosphere and design elements play a leading role in retail satisfaction
- Frontline staff can make or break the museum experience
- Personal interactions with staff can dramatically increase guest satisfaction for the entire museum experience
- Your museum doesn't only tell stories – it makes stories

# Your museum store...



Motivates revisitation



Strengthens supporters/members



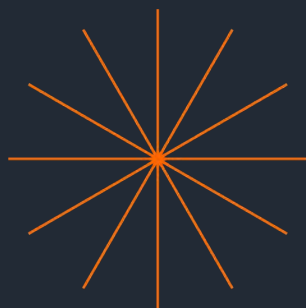
Reinforces positive sense of self



Makes memories



Preserves memories



impacts  
experience

# Thank you!

**Contact**

For all inquiries:

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