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Strategic Insights for Overcoming the Three Biggest Pain Points for History Organizations in the Next Five Years

Annual Meeting of the Heritage Chocolate Society
Washington, DC | February 27, 2024



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Co-Founder, IMPACTS Experience

*“Do what you love. **Know your own bone;** gnaw at it, bury it, unearth it, and gnaw at it still.”*

– Henry David Thoreau



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What counts as a **history organization?**

Sample sizes

Through end-of-year 2023

$n=283,653$

US composite (cumulative)

$n=60,079$

US history high-propensity visitors (cumulative)

$n=23,771$

US composite - history perceptions (two years)

$n=16,108$

US history high-propensity visitors (two years)

There are several **challenges** facing history organizations in 2024.



Many of these issues fall into one of three categories:

Motivating America

Pain point: Elevated digital expectations

Welcoming America

Pain point: Expanding audiences

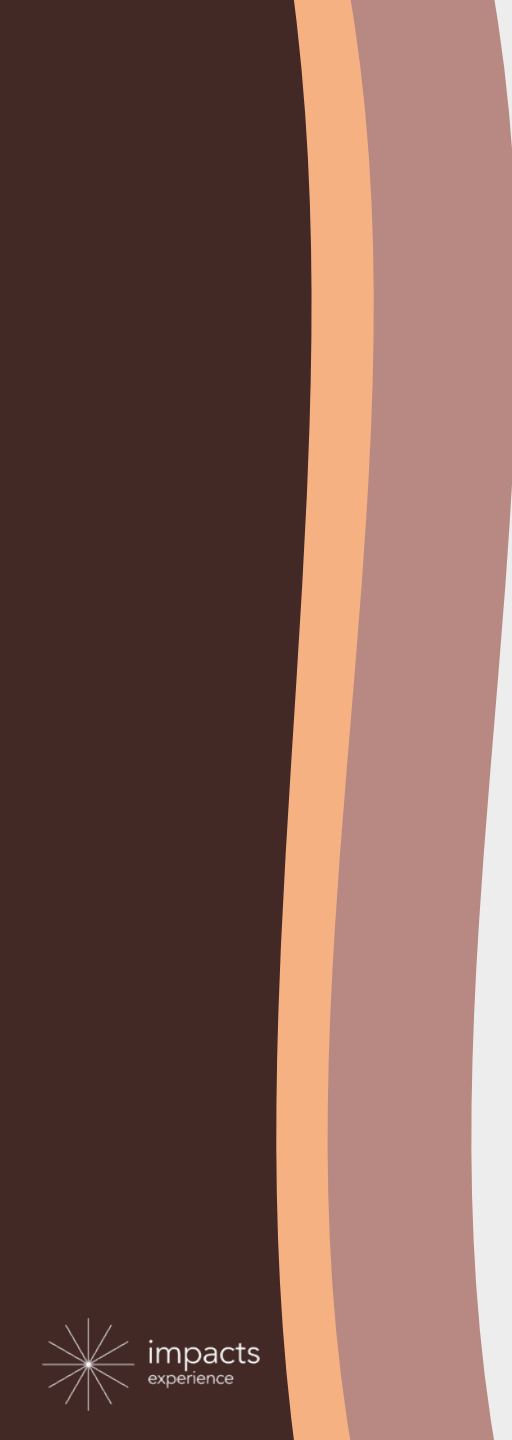
Serving America

Pain point: Aligning action with expectation



Motivating America

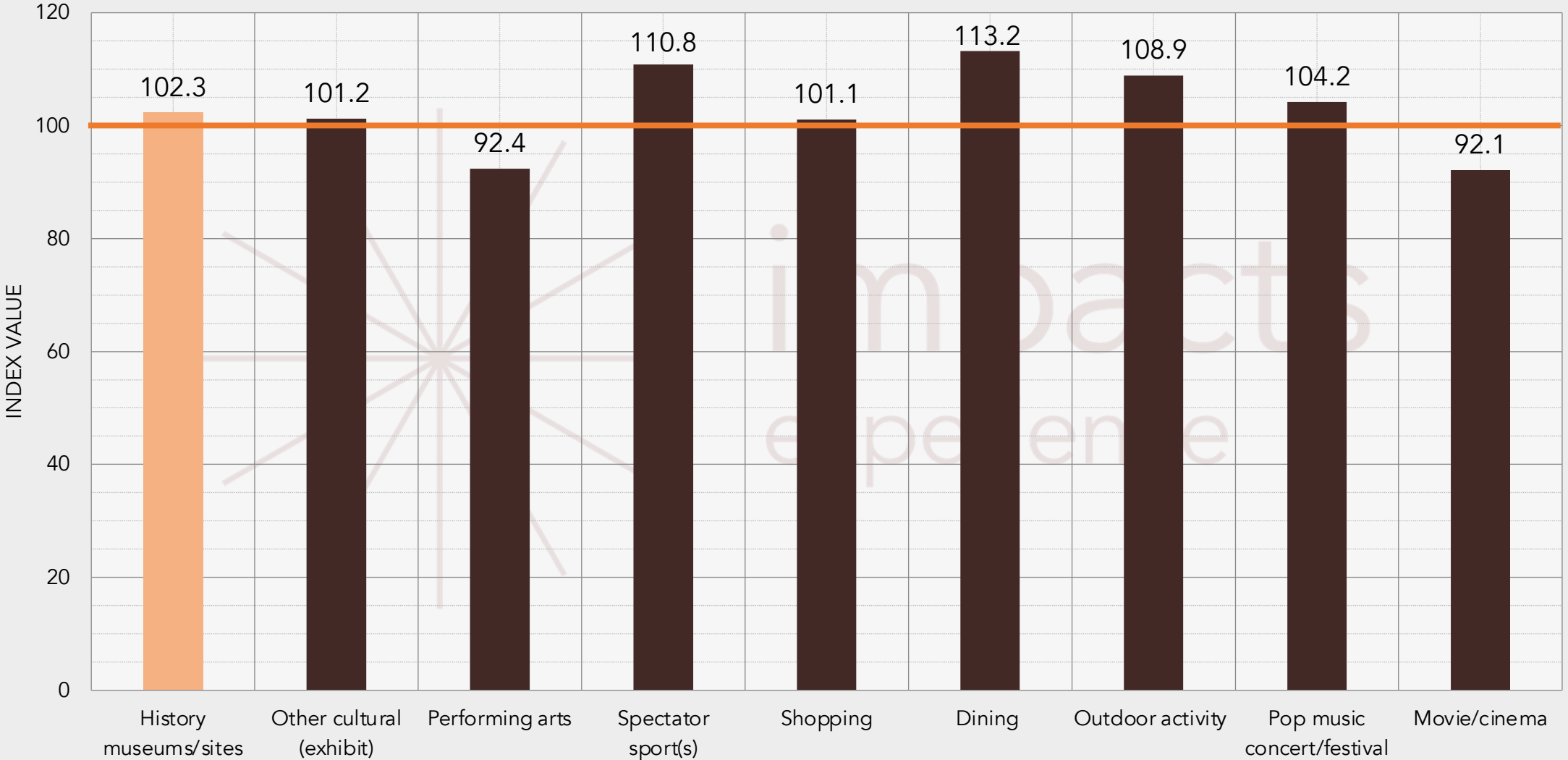
Pain point: Elevated digital expectations



There are many exciting things competing for **out-of-home leisure time** among likely visitors.

What are the top competing out-of-home activities for likely visitors to history organizations?

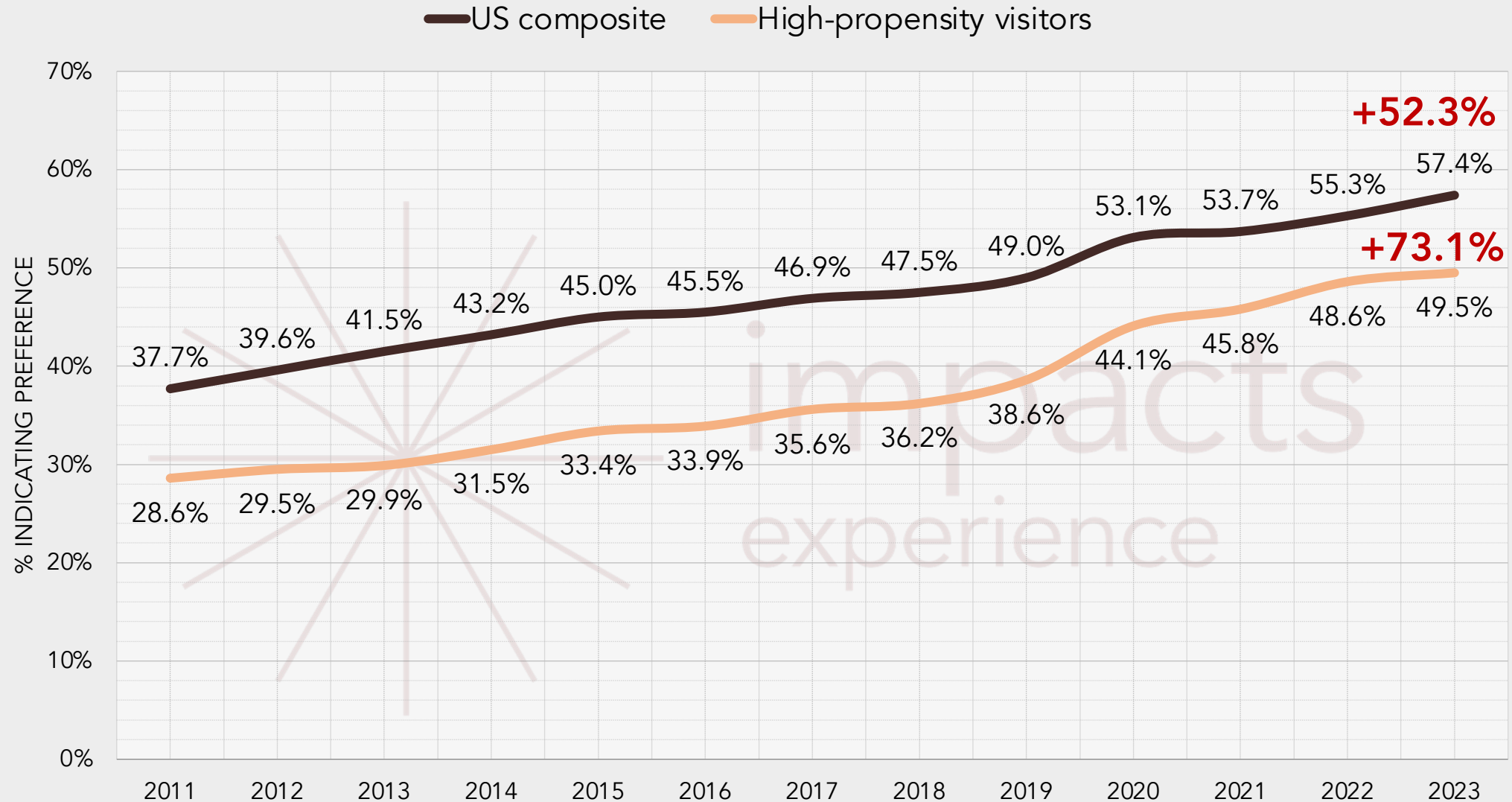
Top-of-mind by alternative leisure activity, US high-propensity visitors, EOY 2023



But there's another fierce competitor for our **leisure time**.



"Stay home" during weekend preference



What are they
doing at home?

86.8% say they
browse the Internet.

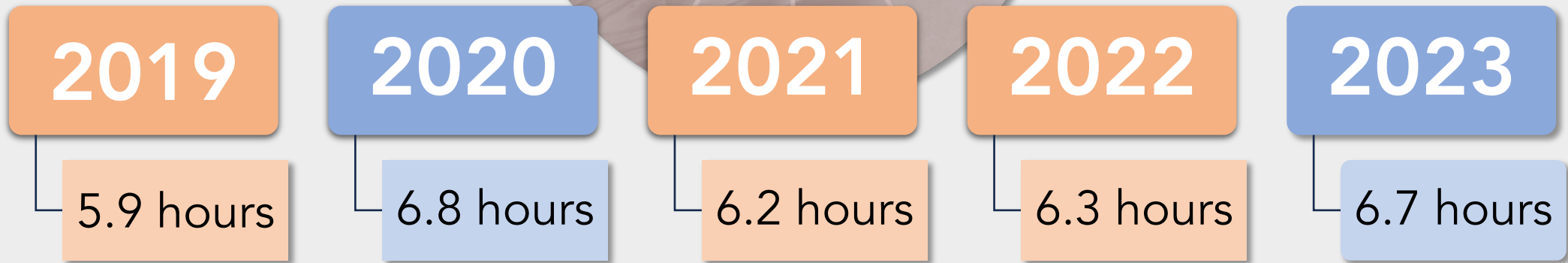
(EOY 2023)

Average hours spent on digital platforms per day

US adults



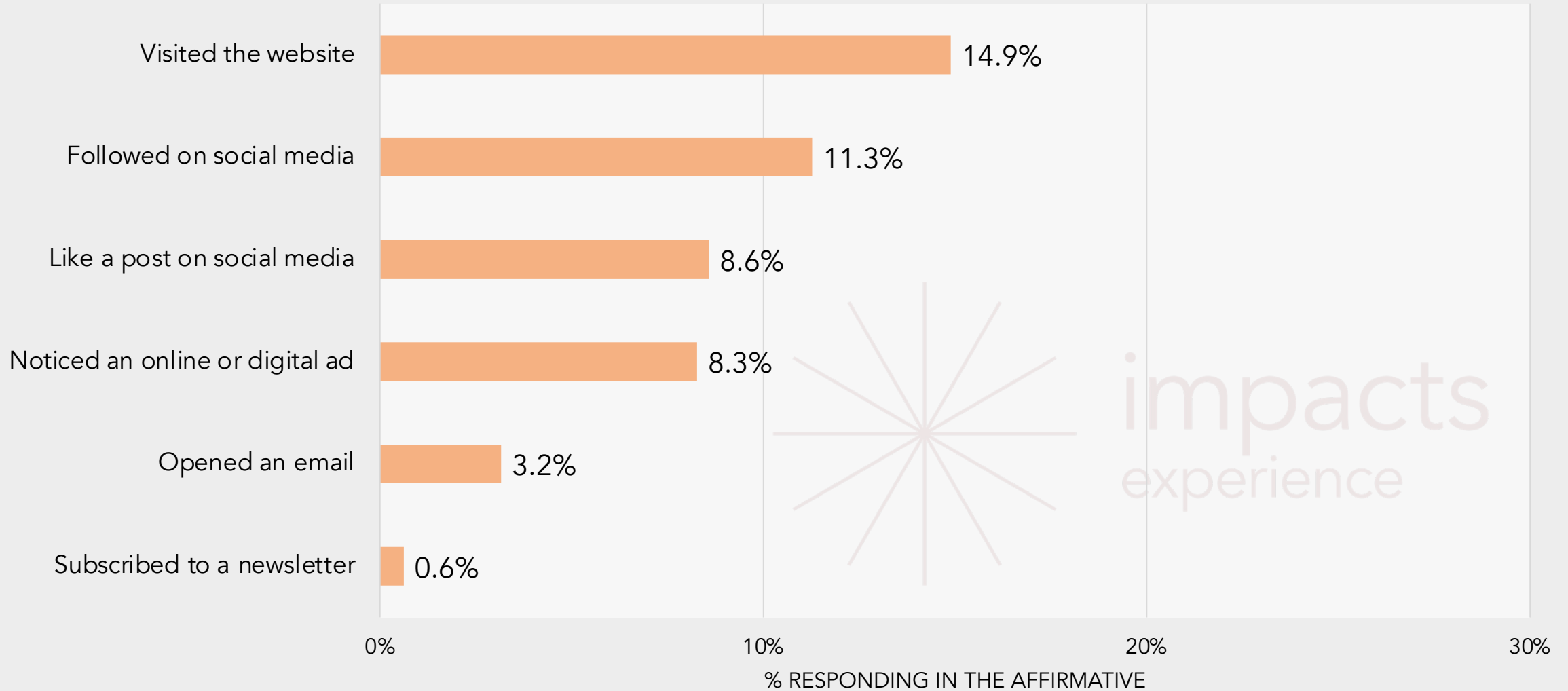
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"In the past year, have you [...] in relation to the history organization?"

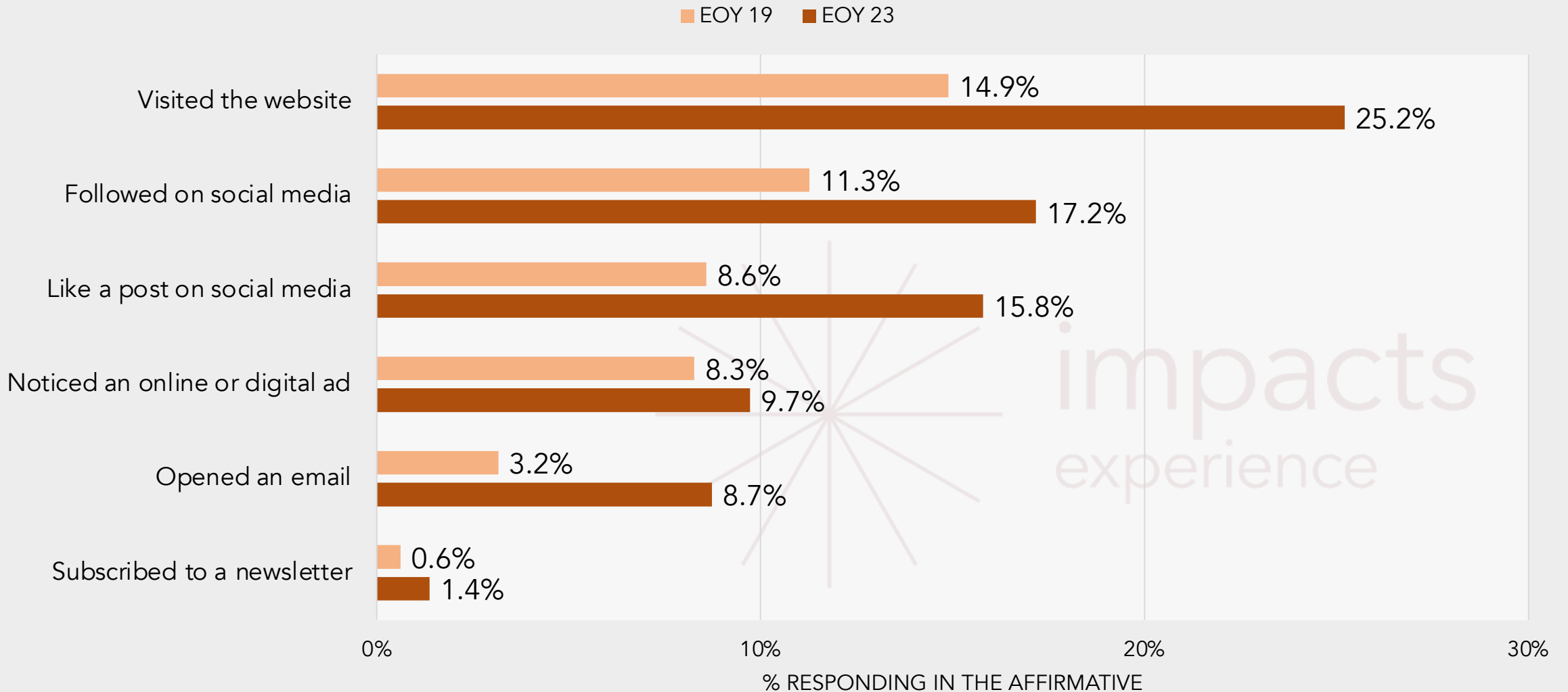
US history adult high-propensity visitors, EOY 2019

EOY 19



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

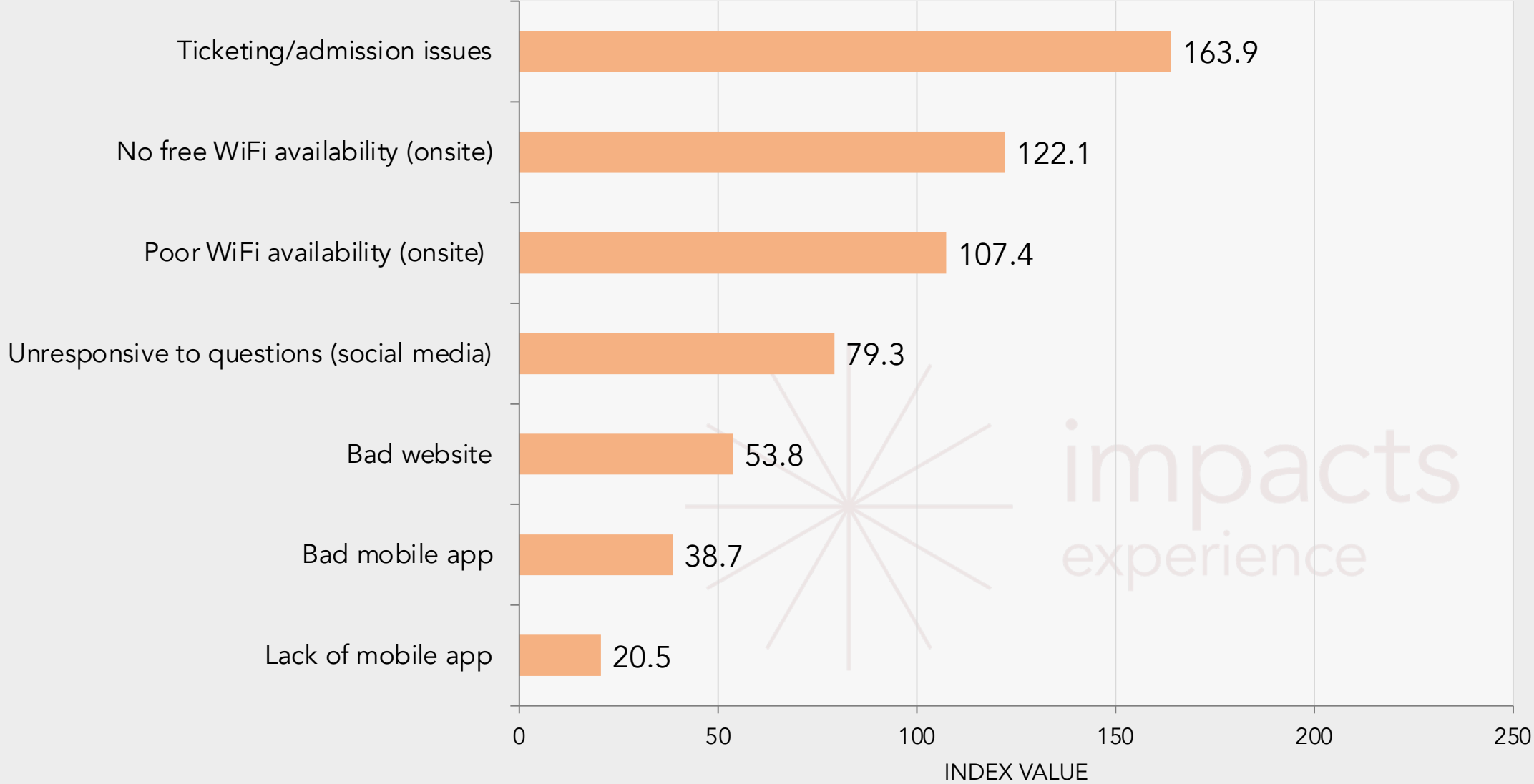
US history adult high-propensity visitors, EOY 2019



How can history
organizations improve
digital engagement?

What are the top digital dissatisfiers for history organizations?

US adults, EOY 2023



Meet audiences
where they are.

They are **online.**



Key takeaways:

- Even among Americans with interest in visiting history organizations, other out-of-home activities emerge as more immediately able to secure attendance or participation. These competing areas of interest may prove helpful for considering partnerships or programs to drive attendance.
- The couch is a growing competitor for American's leisure time, both among the US composite market as well as likely visitors to cultural organizations.
- Even when people stay home, they remain connected to the web. In 2023, Americans spent almost as much time online as they did during the height of the pandemic in 2020.
- A higher percentage of Americans are digitally engaging with history organizations than in 2019. In other words, the need to "meet audiences where they are" online is greater today than it was before the pandemic.
- Ticketing issues, WiFi issues, and unresponsive social media accounts are the top digital dissatisfiers for history organizations. These issues are posing a notable barrier and highlight some immediately actionable solutions for organizations.
- Meet audiences where they are. They are online.



Welcoming America

Pain point: Expanding audiences

How many months does the average American history museum/site guest go between visits to history organizations?

23.9 months

Current visitor substitution ratio

US history museums/sites, EOY 2023

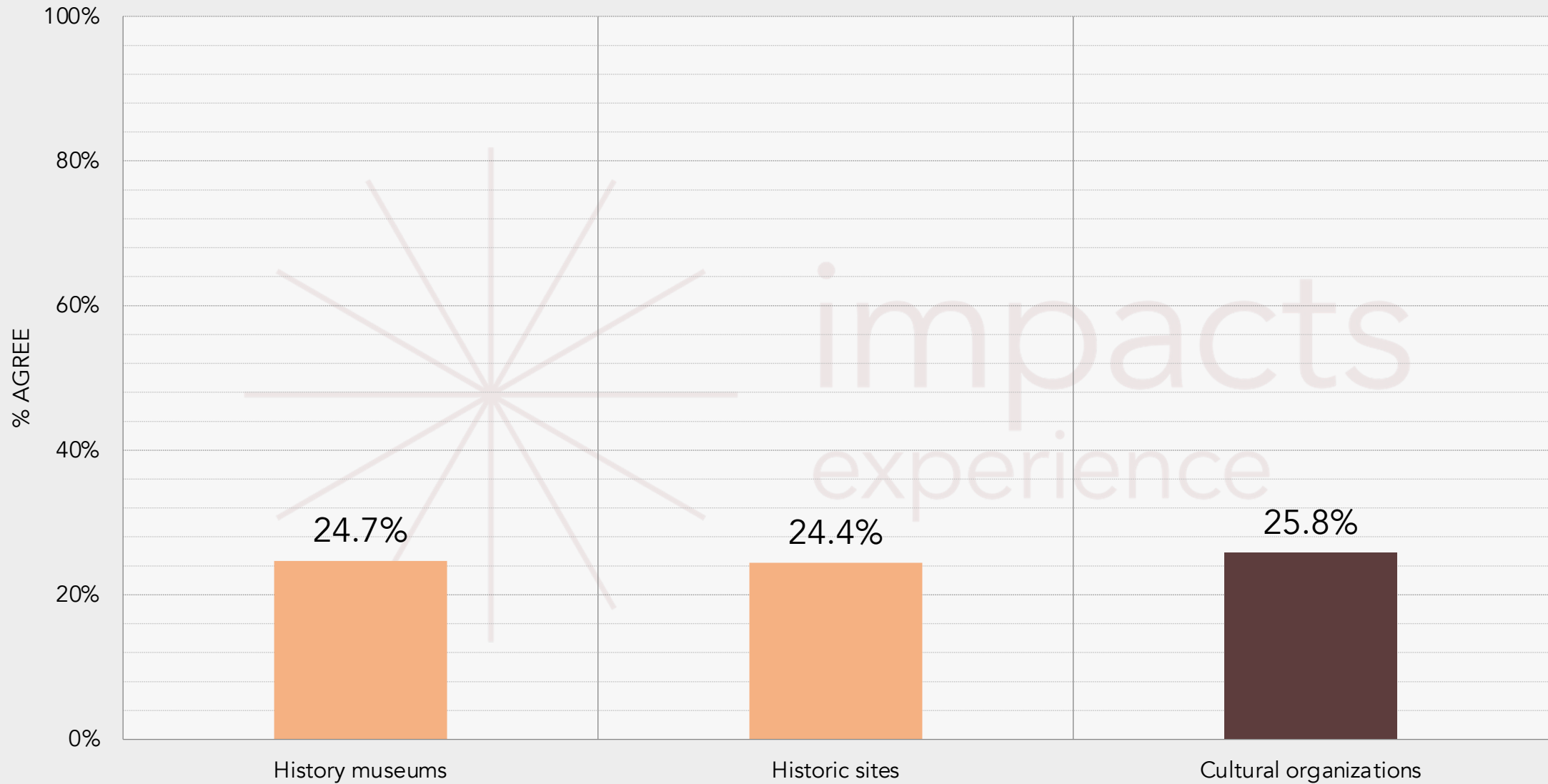


Visitation cycle:
23.9 months

Let's talk
welcoming perceptions.

Negative attitude affinities by organization type

Percentage of US adults indicating [cultural organization] is NOT welcoming to "people like me," EOY 2023

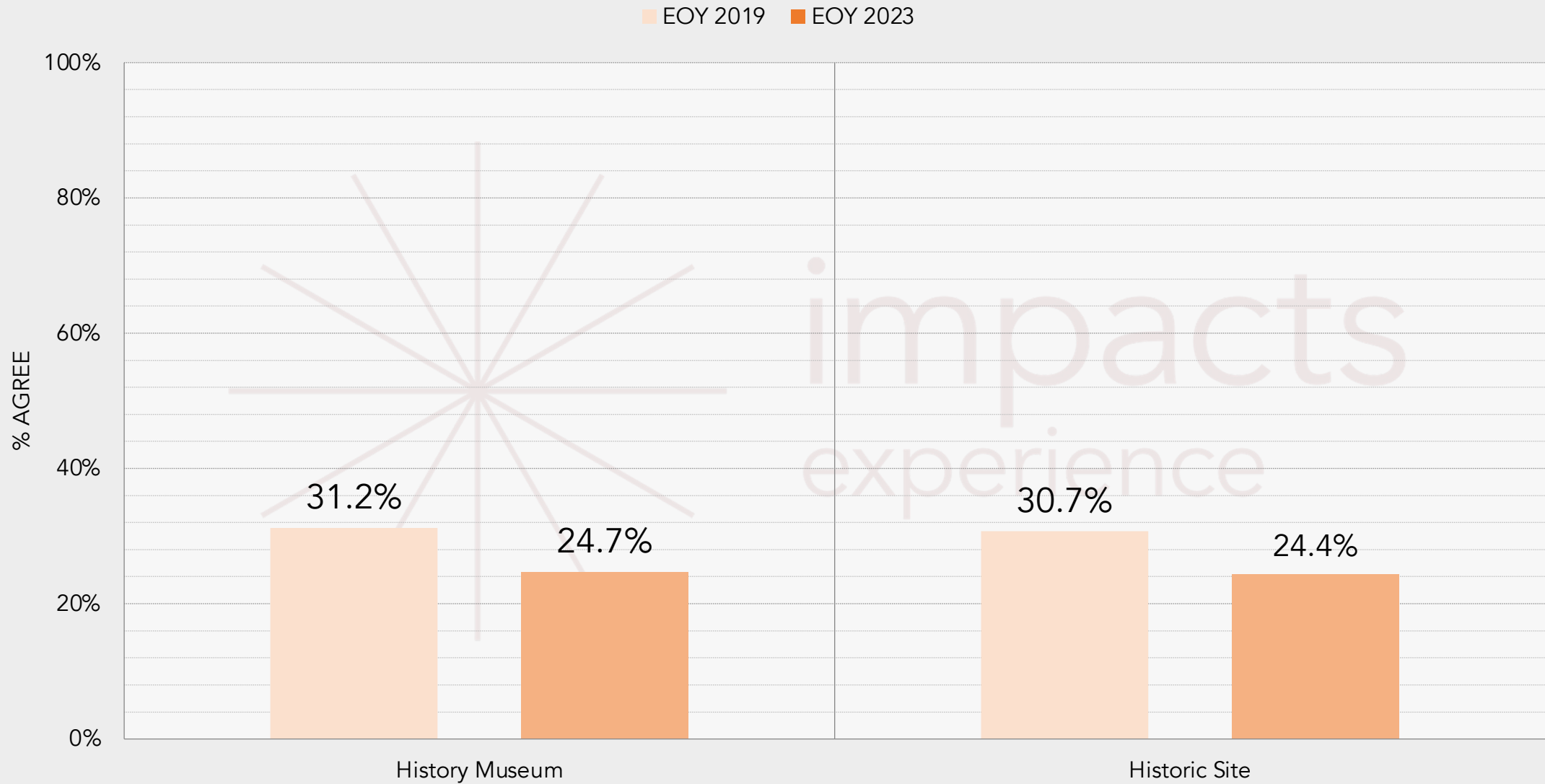


A quarter of Americans do not
feel that history organizations are
“places for people like me.”

But there's good news...

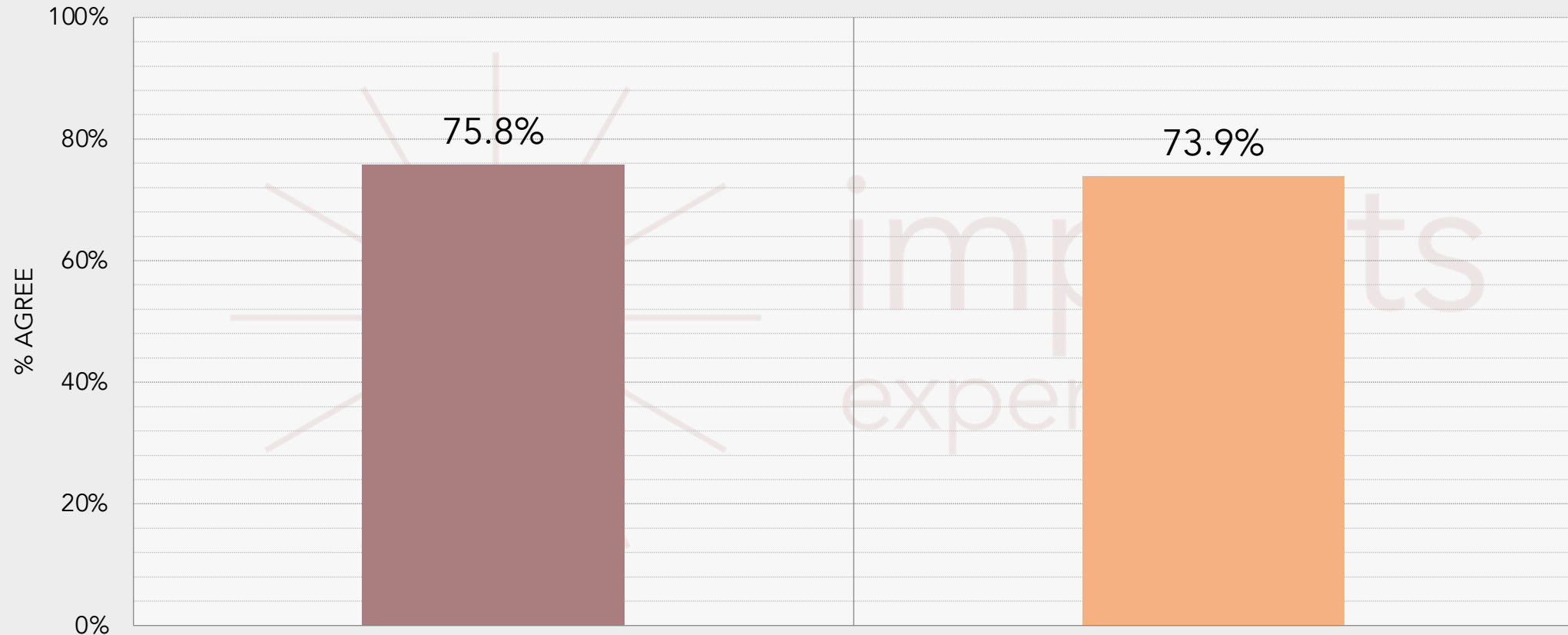
Negative attitude affinities by organization type

Percentage of US adults indicating [history museums/historic sites] are NOT welcoming to "people like me," EOY 2023



History museum and site perceptions

US adults, self-identified BIPOC, EOY 2023



"History organizations have recently made efforts to encourage the participation and inclusion of more diverse audiences."

"Recent efforts made by history organizations to encourage more diversity and inclusion have been successful."

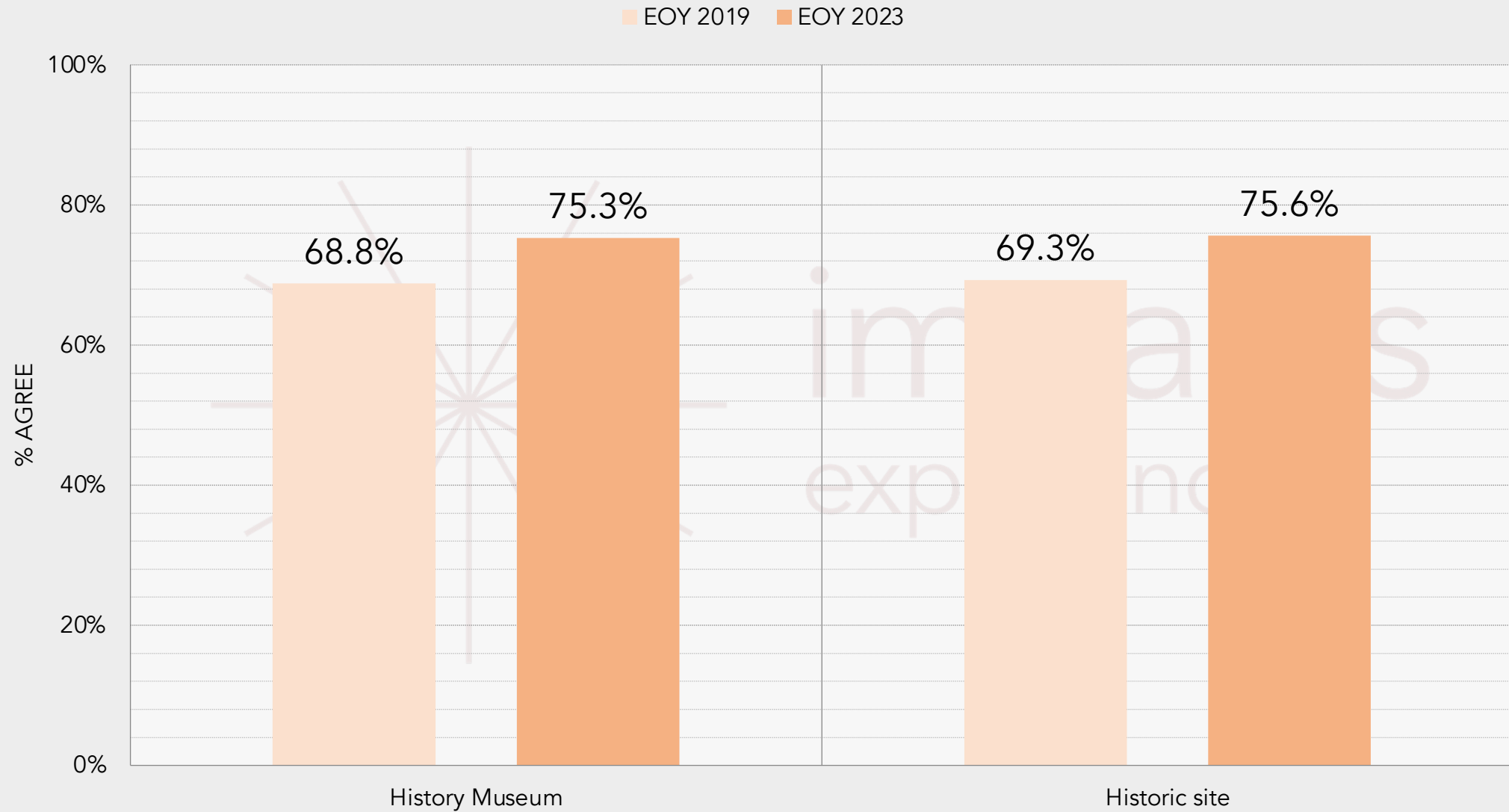
Let's flip this!

History organizations
are making **progress.**



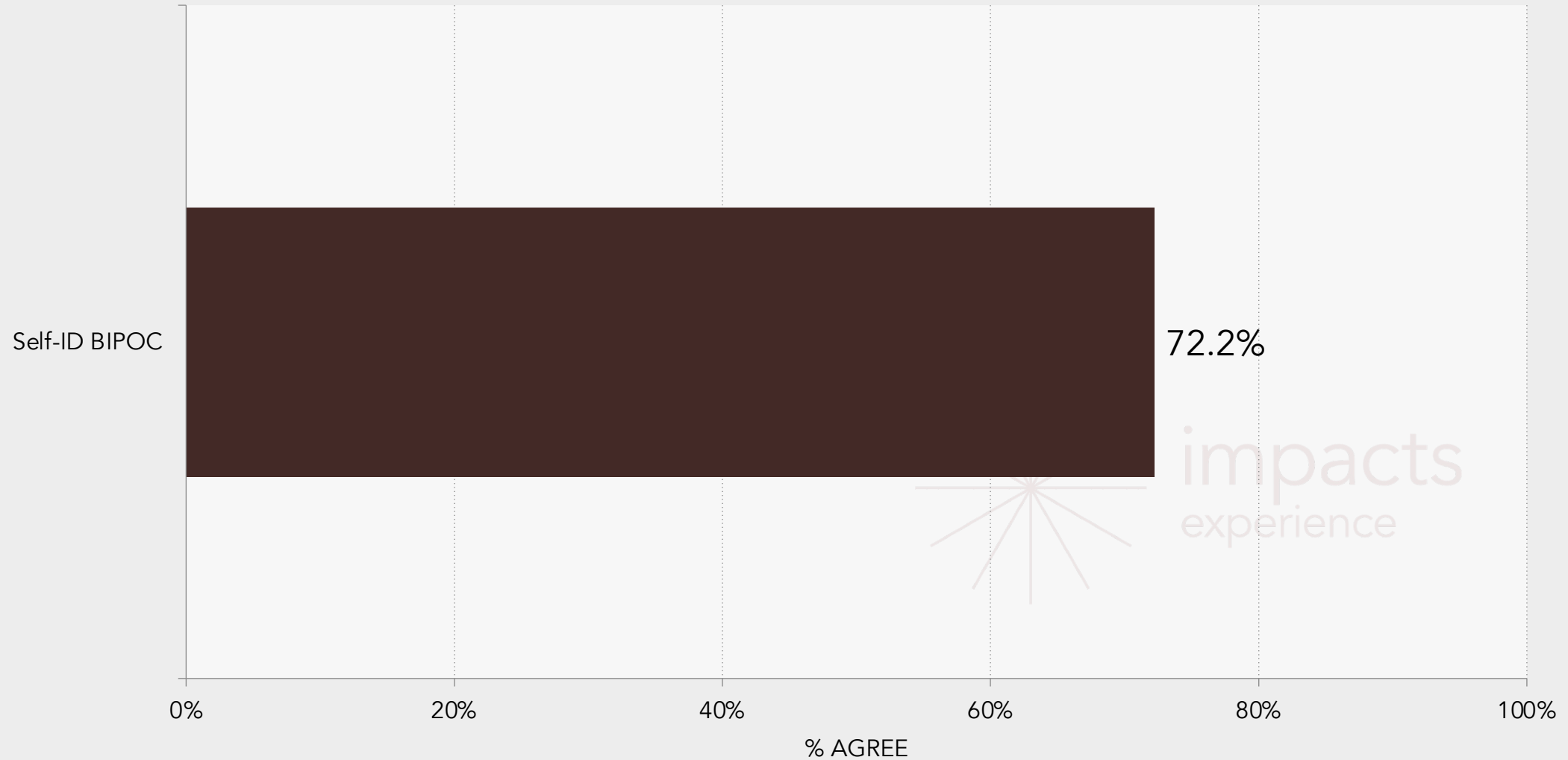
[History museum/sites] are welcoming to people like me.

US visitor-serving organizations, EOY 2023



“Overall, recent efforts to encourage more diversity and inclusion have **made me feel more welcome** when visiting a history organization.”

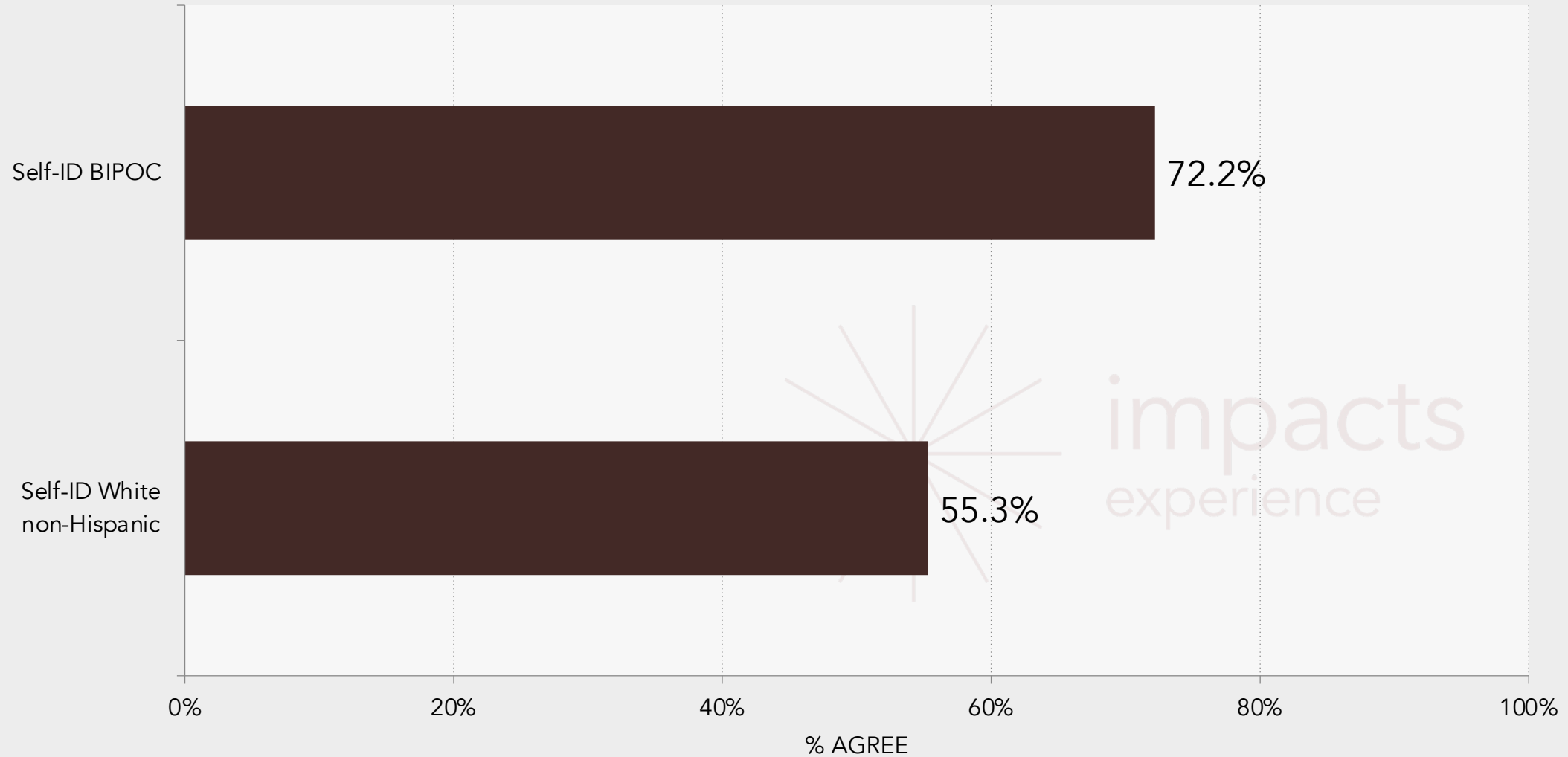
US adult recent history museum visitors by self-identified race, EOY 2023



“But efforts to encourage diversity and inclusion alienate historic audiences!”

“Overall, recent efforts to encourage more diversity and inclusion have **made me feel more welcome** when visiting a history organization.”

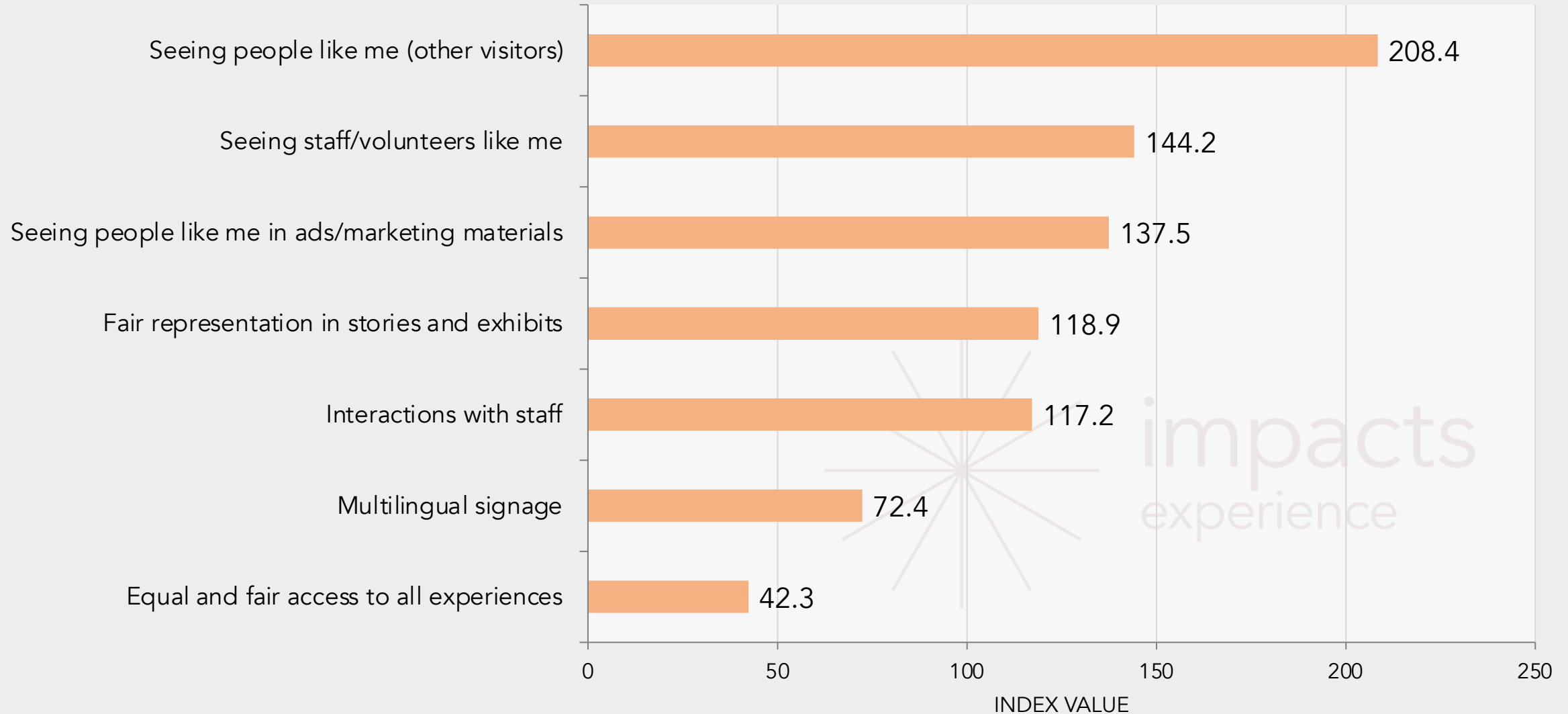
US adult recent history museum visitors by self-identified race, EOY 2023



What makes an
experience **welcoming**?

How do Americans describe a "welcoming" experience at a history organization?

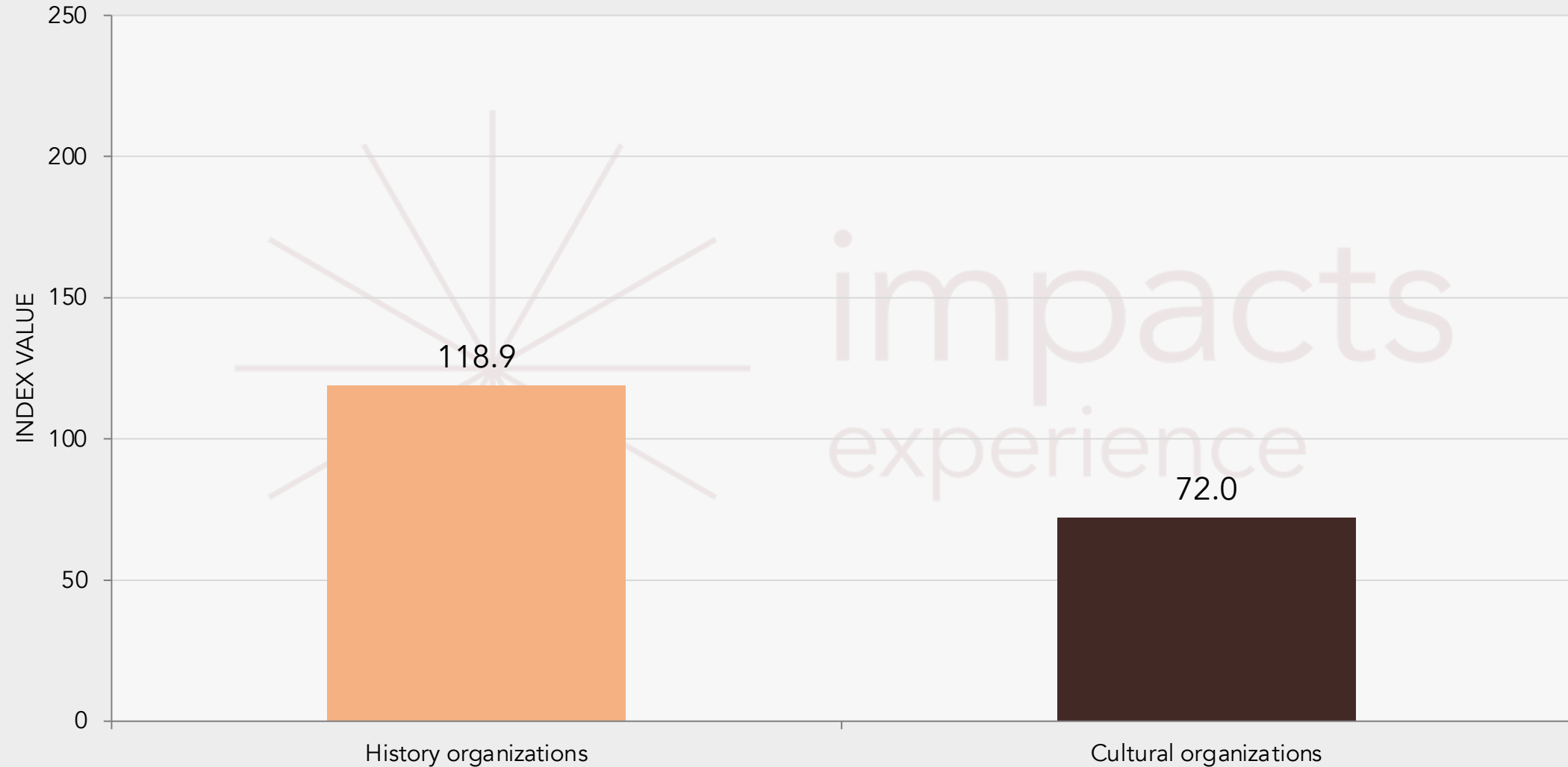
US adults, EOY 2023



How do Americans describe a "welcoming" experience?

History organizations v. cultural organizations, EOY 2023

Fair representation in stories and exhibits



Feeling **welcome**
is about **people**.



Key takeaways:

- History organizations are not expanding audience profiles fast enough to keep pace with population growth, resulting in an ongoing loss in market potential.
- A quarter of Americans do not feel welcome at history organizations. This outlines important work to be done. This value is similar to the percentage of people who do not feel welcome at exhibit-based cultural organizations overall.
- BIPOC and millennial (and younger) audiences do not feel as welcome at history organizations as people who do not self-identify to these demographics.
- Self-identified BIPOC audiences agree that history organizations have made efforts to encourage participation from diverse audiences, and that these efforts have been successful.
- Feeling welcome is about people. The top factors that make an experience welcoming at a history organization include “seeing people (visitors) like me,” “seeing staff volunteers like me,” and seeing “people like me” in marketing materials.
- Compared to other cultural organizations, fair representation in stories and exhibits is even more important to history visitors.



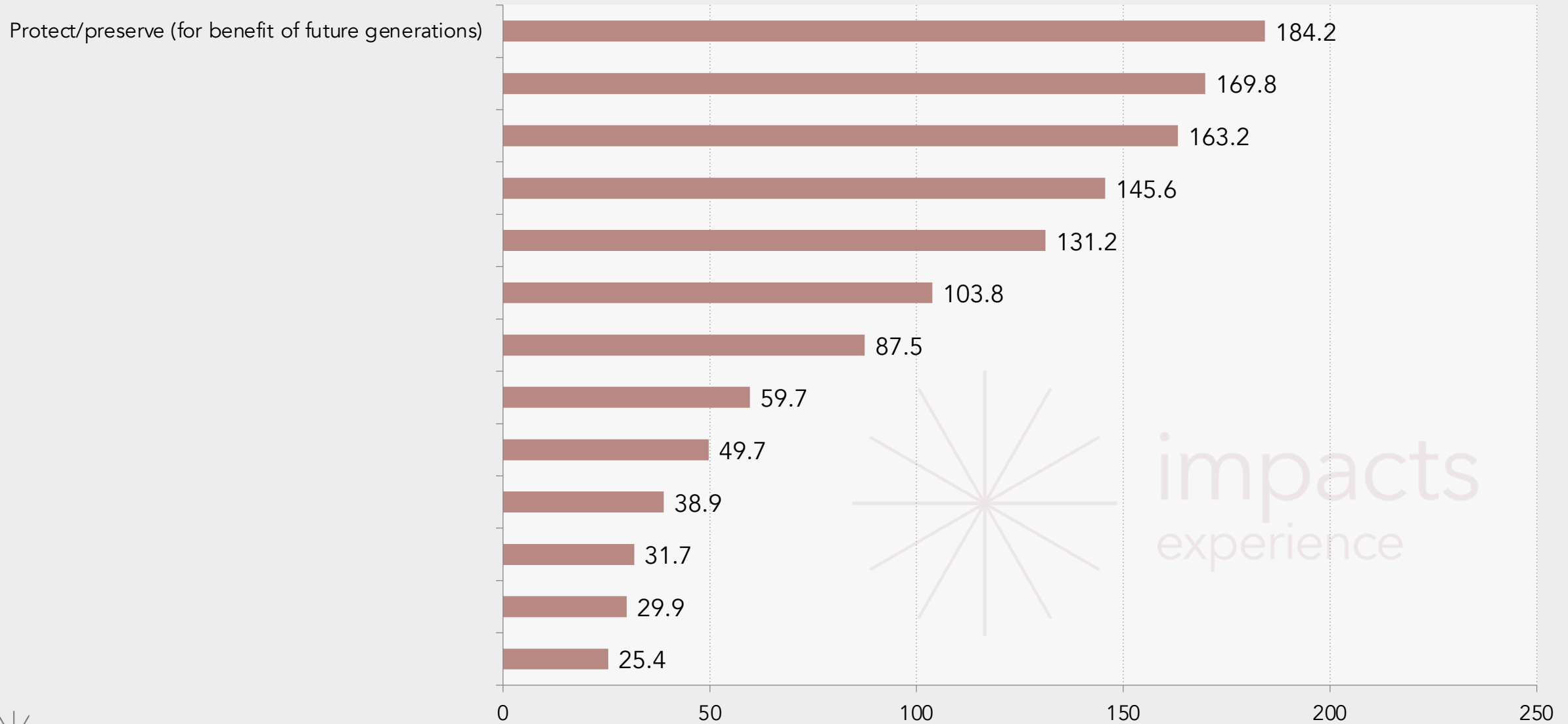
Serving America

Pain point: Aligning action with expectations

What **meaningful achievements** do you associate with history organizations?

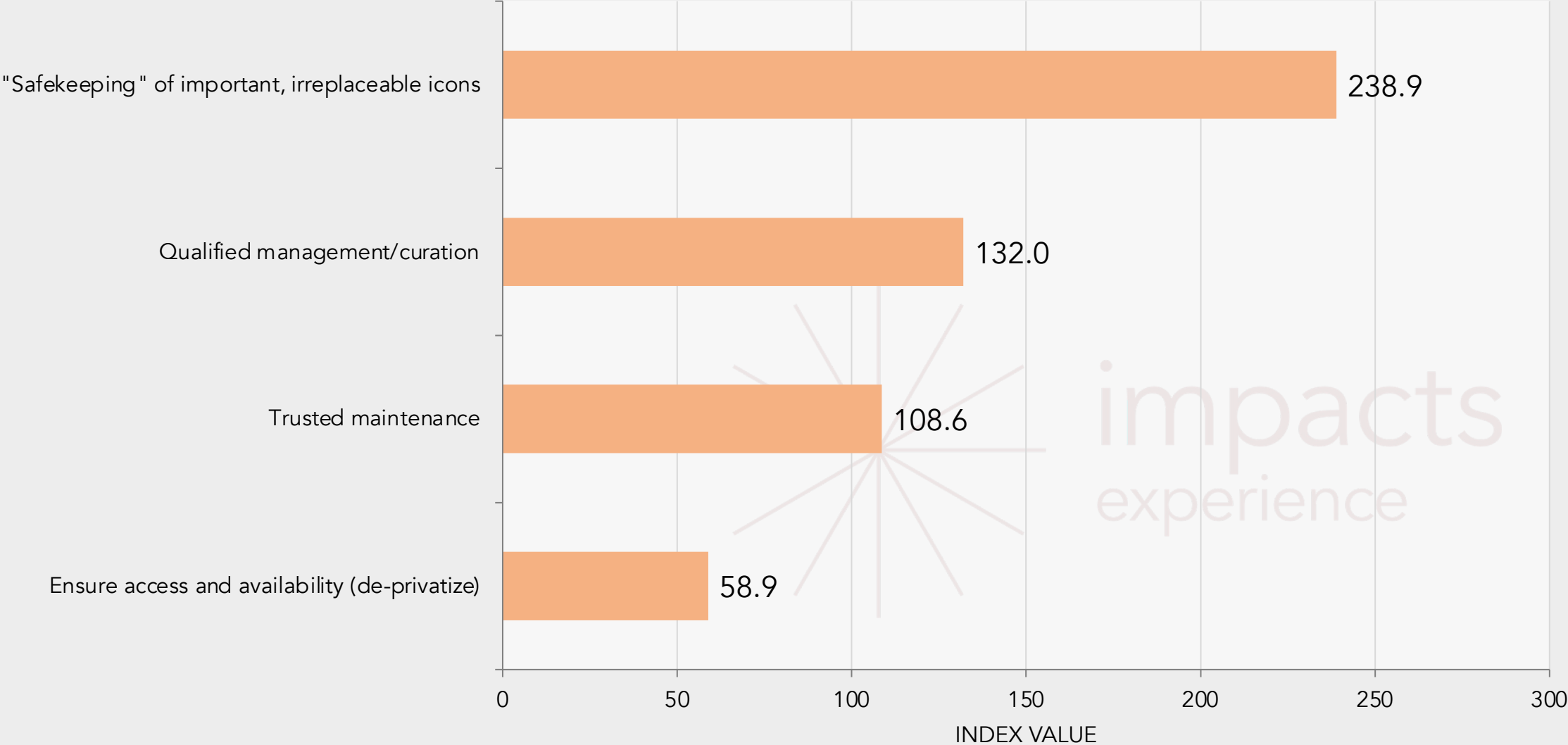
What meaningful actions or achievements do you associate with the [history organization]?

EOY 2023



"Protect and preserve (for benefit of future generations)"

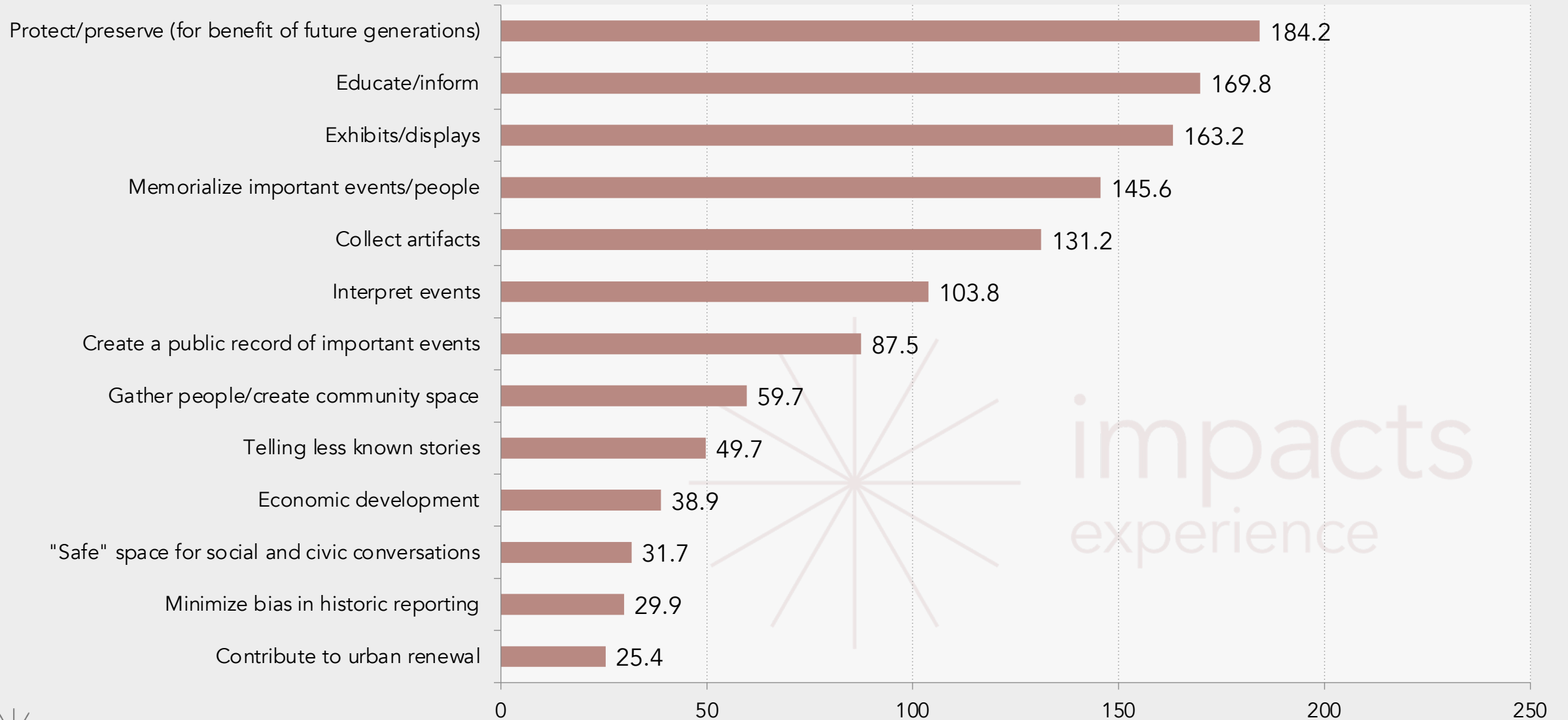
Lexical analysis, EOY 2023



History organizations **protect, preserve, and “safekeep”** the **items** that represent our nation’s most important stories.

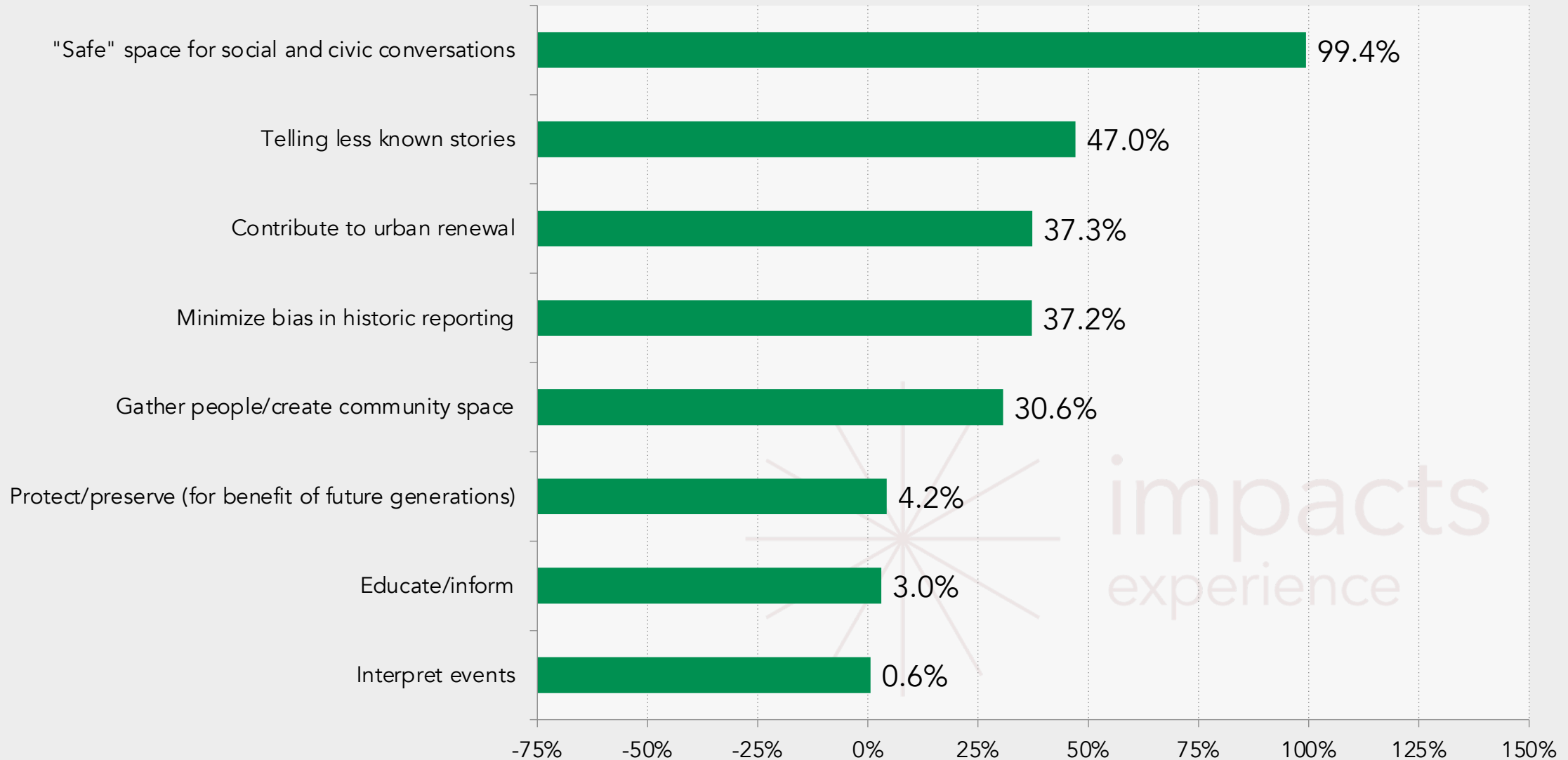
What meaningful actions or achievements do you associate with the [history organization]?

EOY 2023



What meaningful actions or achievements do you associate with the [history organization]?

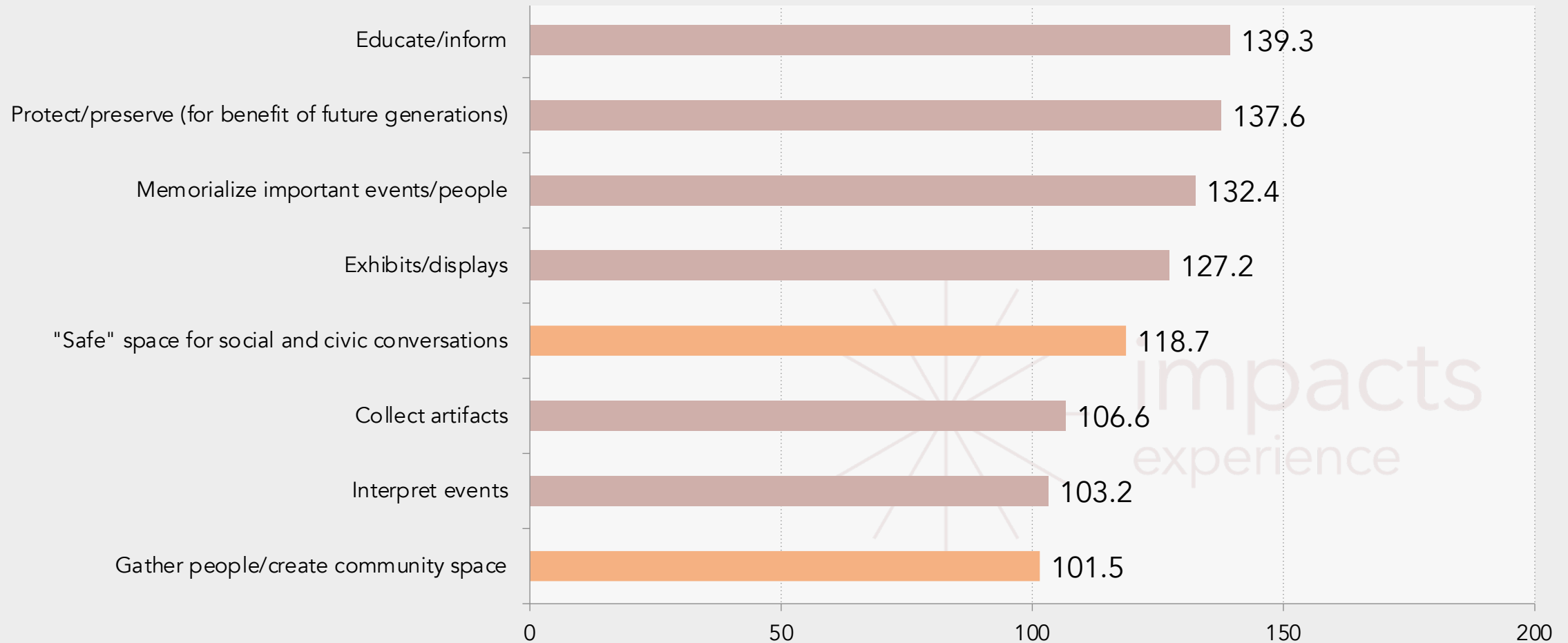
Positive percent change since 2010



But what do people think that
history museums and historic
sites **should** be doing?

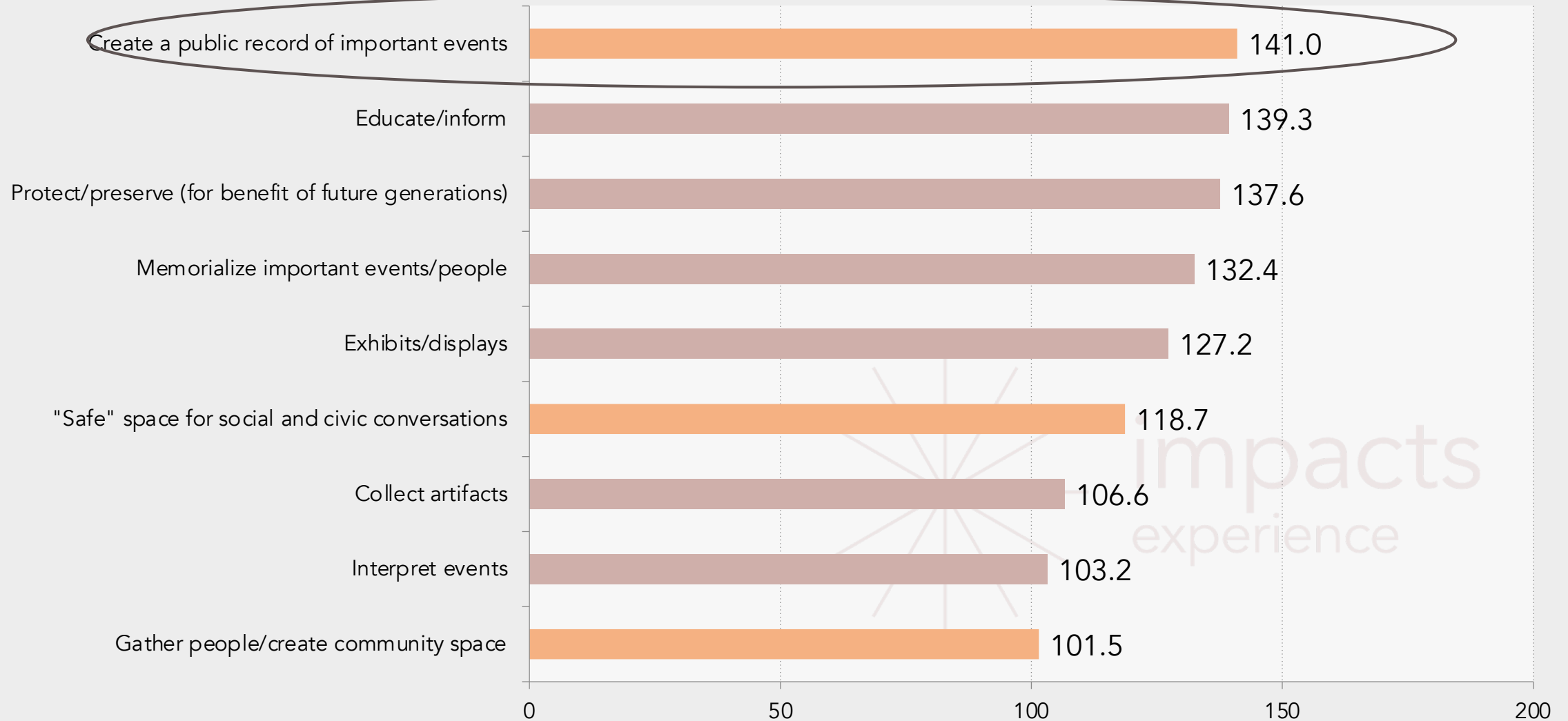
What do Americans believe that history organizations **should** concern themselves with?

Endorser concern index over 100, EOY 2023



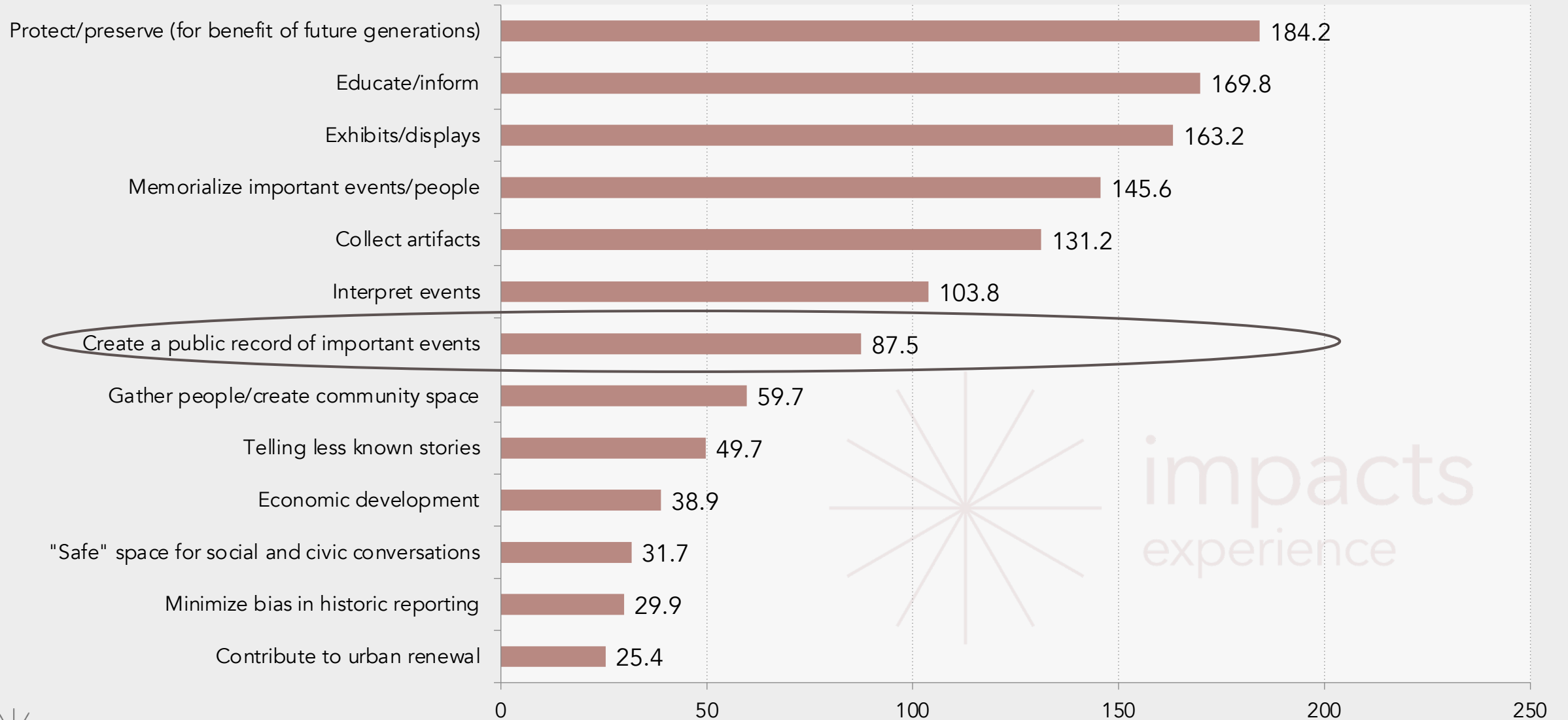
What do Americans believe that history organizations **should** concern themselves with?

Endorser concern index over 100, EOY 2023

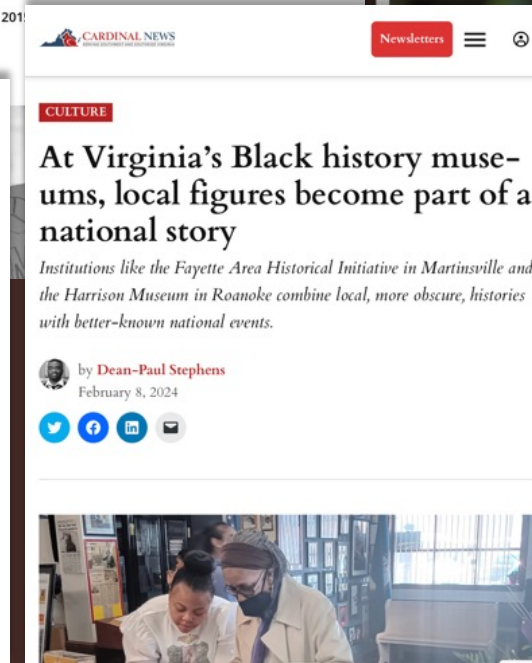
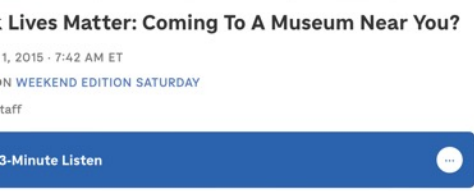
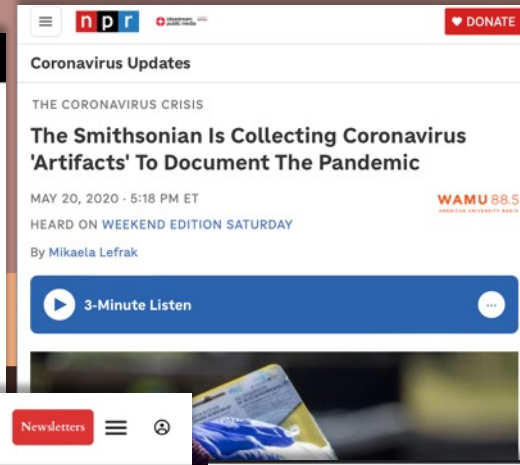


What meaningful actions or achievements do you associate with the [history organization]?

EOY 2023



Create a public record of events.



What we *are* doing:
Protect and preserve
(*safekeeping things*)

What we *should* be doing:
Create a public record
(*safekeeping stories*)

You are the keepers of **history**.
You are the tellers of **our stories**.

We are facing unique and
challenging pain points.

But we've already made progress.

“How would you describe the [history organization] to a friend?”

US adults, lexical analysis by descending frequency of mention, EOY 2023

EOY 2019	RANK	EOY 2023
Good to visit with children	1	Great place to visit
Good place to visit	2	Worth the time
Good to visit with friends/family	3	Good to visit with friends/family
Educational	4	Important
Fun	5	Valuable resource
Interesting	6	Fun
Informative	7	Good place to go on a date
Good for school/class trips	8	Good to visit with children
Downtown	9	Must-see
Boring	10	Interesting

You are the keepers of **history**.
You are the tellers of **our stories**.

And you have **fundamentally
changed perceptions** around how
you carry out this task.

Keep going.

Key takeaways:

- The top meaningful achievement associated with history organizations is protecting a preserving important icons for future generations. Educating/informing, exhibit design and displays, memorializing important events/people, and collecting artifacts are other notable meaningful achievements associated with history organizations.
- History organizations care for the items that tell our nation's important stories. "Protecting and preserving for future generations" means safekeeping important, irreplaceable icons via qualified management, curation, and maintenance.
- Since 2010, the greatest percent growth in meaningful achievements for history organizations is in creating a "safe" space for social and civic conversations; telling lesser-known stories; contributing to urban renewal; minimizing bias in historic reporting; and gathering people/creating a safe community space.
- The top thing that Americans think history organizations *should* be doing is creating a public record of important events. Creating a public record of events means recording history with an unbiased narrative of our nation's past and present, drawing attention to notable stories and events.
- History museums and historic sites are currently seen as more worthy of time, important, valuable, and must-see than they were in 2019. There's work to be done and there are notable pain-points, but history organizations continue to move forward. Keep going.

Key takeaways (continued):

- Americans believe that what we are doing is protecting and preserving (safekeeping *things*). While Americans do believe that this is important, they also believe we *should* be creating a public record (safekeeping *stories/people*).
- History organizations have altered how they are perceived since the pandemic. Hard work is paying off, and history organizations are now described as “worth the time,” “important,” a “valuable resource,” and “must-see.” Although they are facing multiple pain points, history organizations have made progress on many fronts and are positioned to continue their forward movement.

Thank **you!**

For all inquiries:

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