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# Shifting Patterns

## *What Changes in Motivating Attendance Mean for Your Museum Store*

MSA Forward 2024  
Baltimore, MD

# Colleen Dilenschneider

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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@colleendilen



This morning, I shared research on  
the power of **retail experiences and  
retail visitors.**

Retail experiences exist within the **broader context** of a museum.

Trends impacting museum engagement **can directly impact** the success of retail operations.

**IMPACTS Experience** has been granted permission to share extant contemporary research sponsored by key partners with vested interest in understanding audiences for visitor-serving organizations.



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# Sample sizes

As of Q1 2024

**n=94,775**

US composite, exhibit-based organizations with onsite retail stores (cumulative)

**n=15,939**

Recent visitors to exhibit-based organizations with onsite retail stores (within the past three years)

**n=3,867**

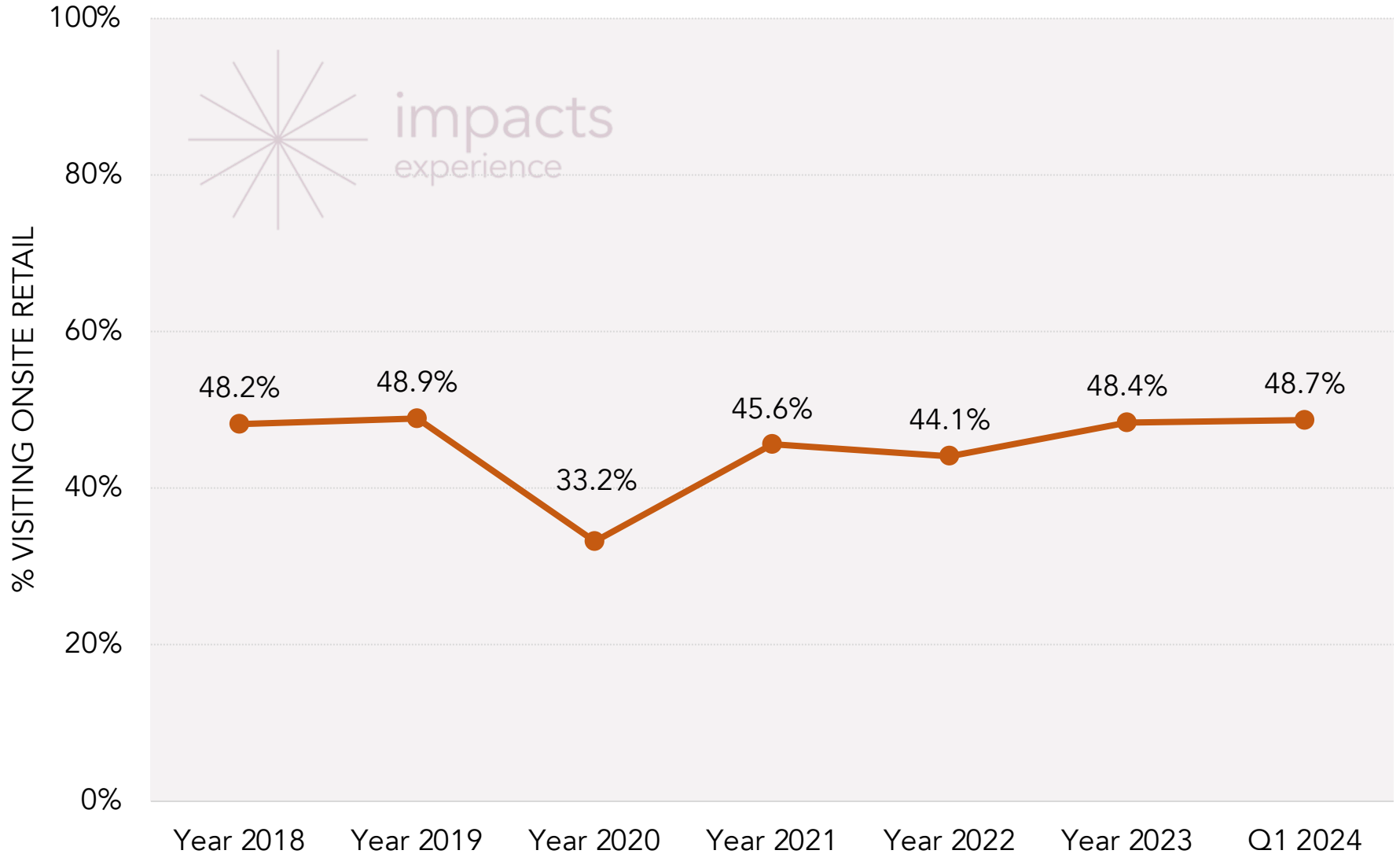
Members of an exhibit-based organization with an onsite retail store

**n=4,524**

Recent visitors to a museum store (within the past three years)

# Percent of guests who report visiting the retail store

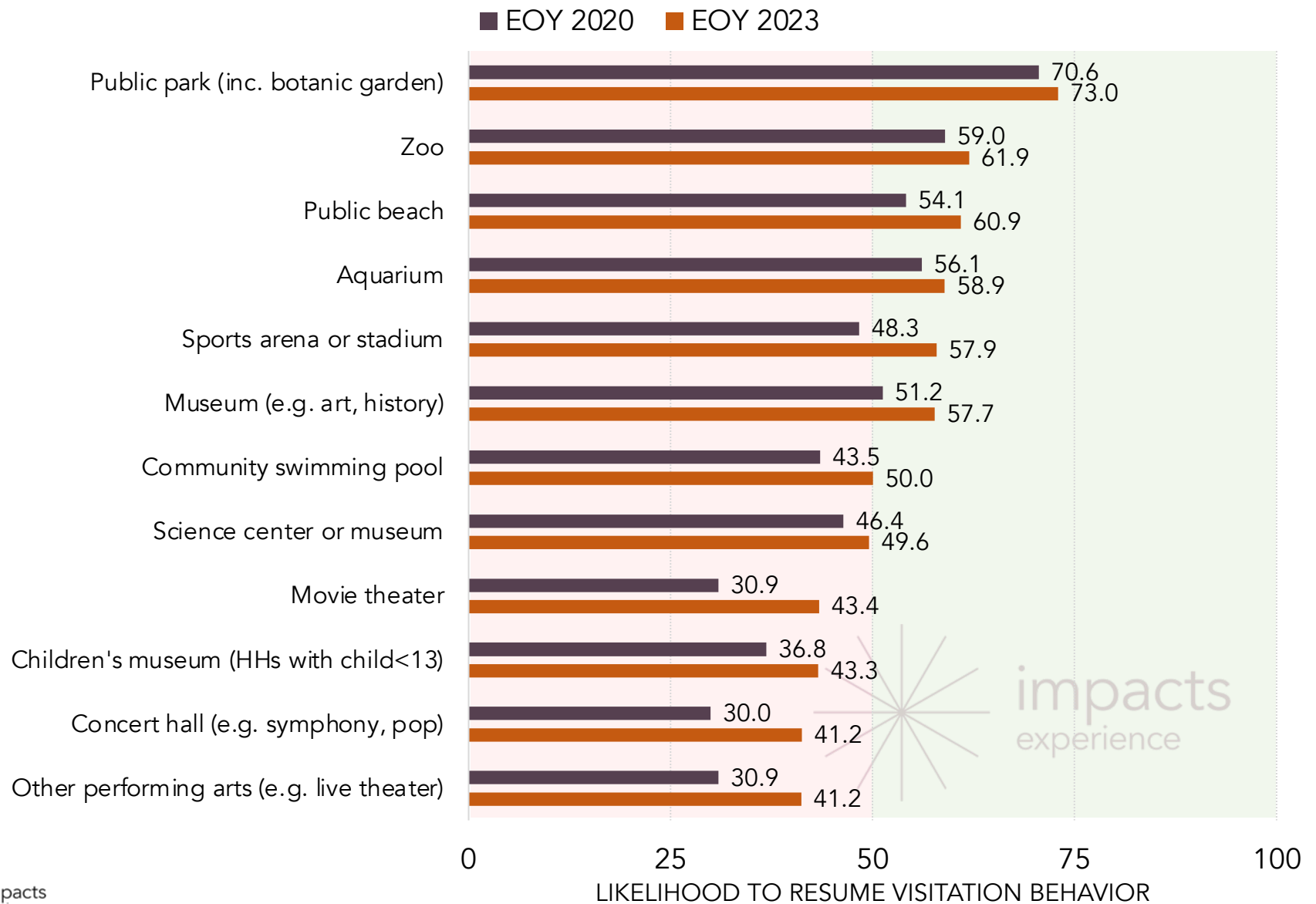
Temporal analysis, 81 visitor-serving organizations





# Redistribution of demand

Shown by category of visitor-serving organizations, US high-propensity visitors  
Value 50 indicates normal activity for each visitor-serving entity as of EOY 2019



What are three of the **biggest trends** impacting museum attendance right now, and what might they mean for your retail experience?

**Digital**  
engagement

Welcoming  
**perceptions**

**Mission**  
relevance

# Digital Engagement

Time spent online  
**increased dramatically**  
during the pandemic.

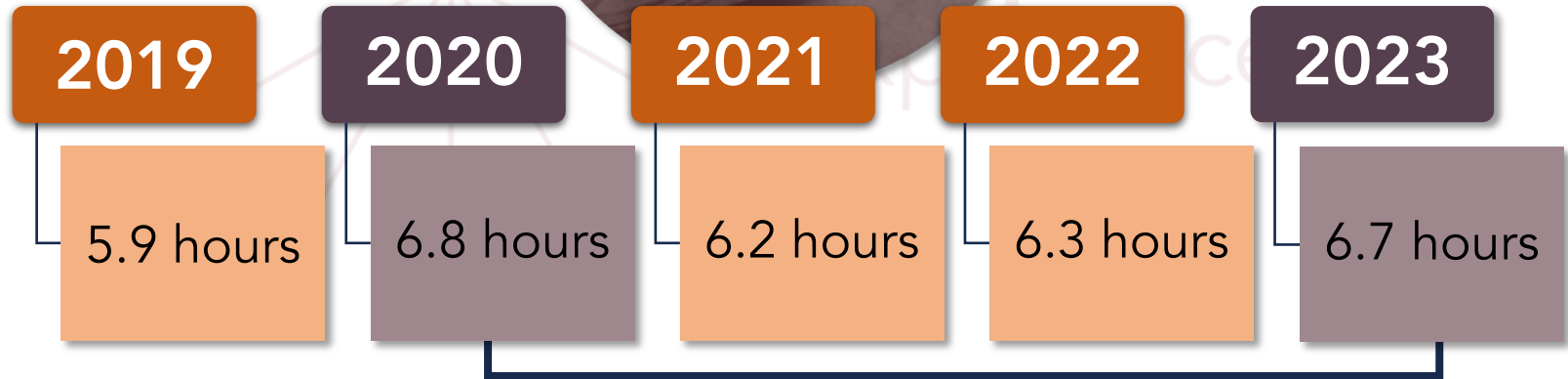
**2020 – 6.8 hours**

**2019 – 5.9 hours**



# Average hours spent on digital platforms per day

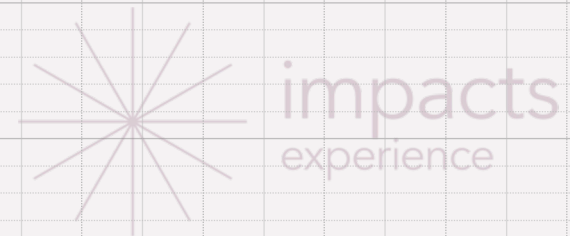
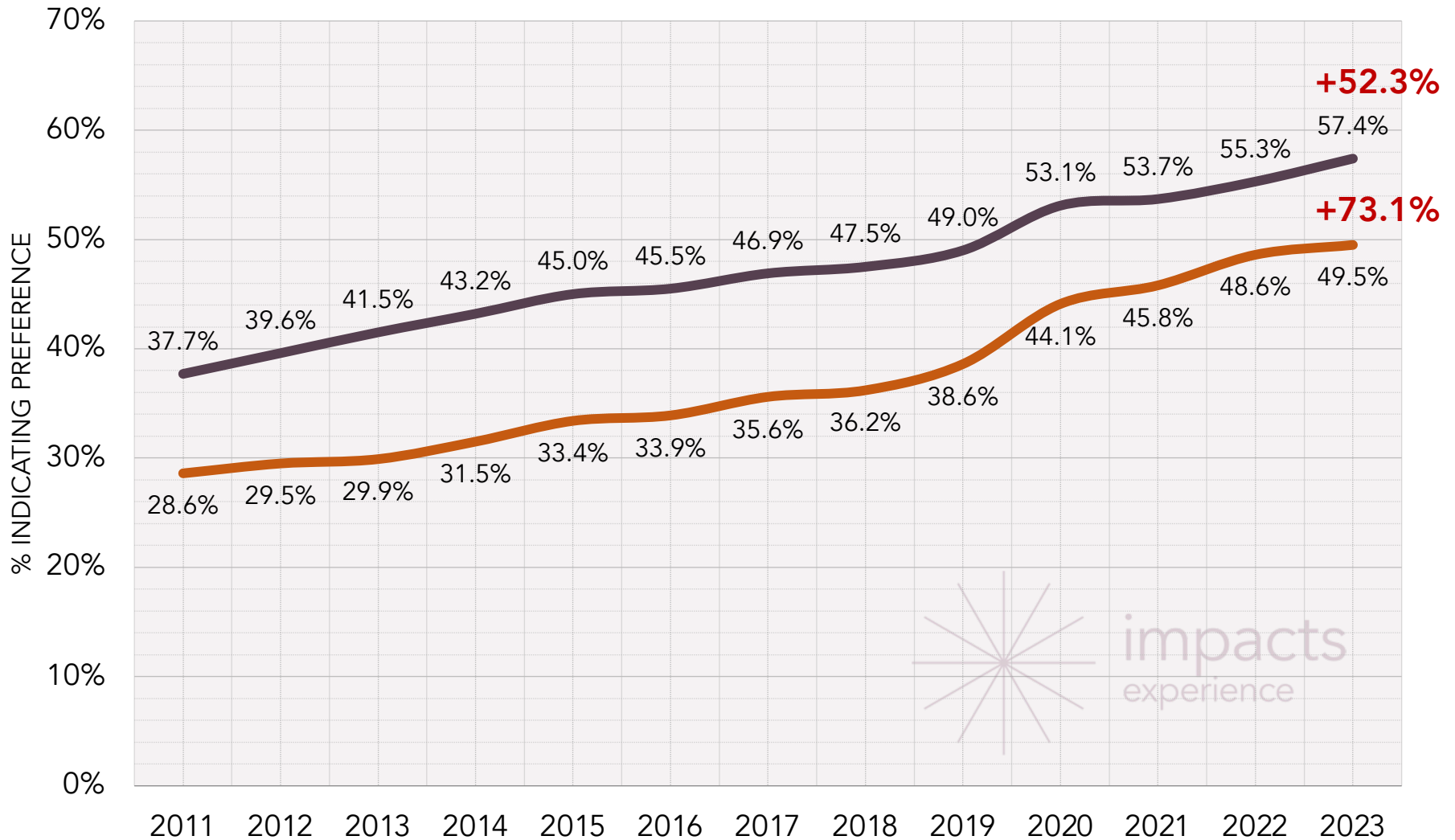
US adults



# "Stay home" during weekend preference

EOY 2011-2023

US composite High-propensity visitors

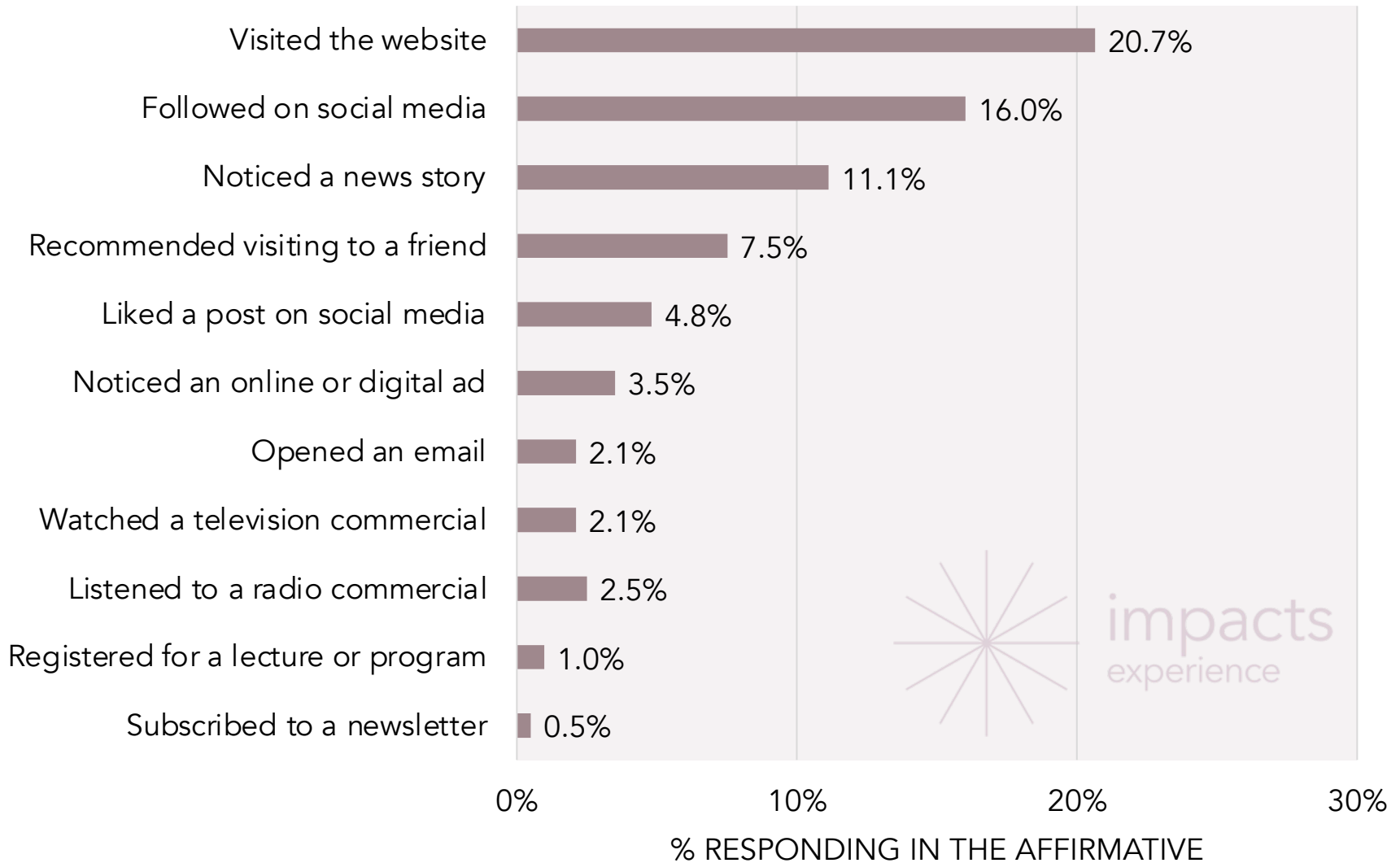


But even when people are at home, they are still connected. **Just over 90% of Americans** say that they browse the Internet when they stay home over the weekend.

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

US adults with precedent unaided awareness, EOY  
81 organizations with retail stores

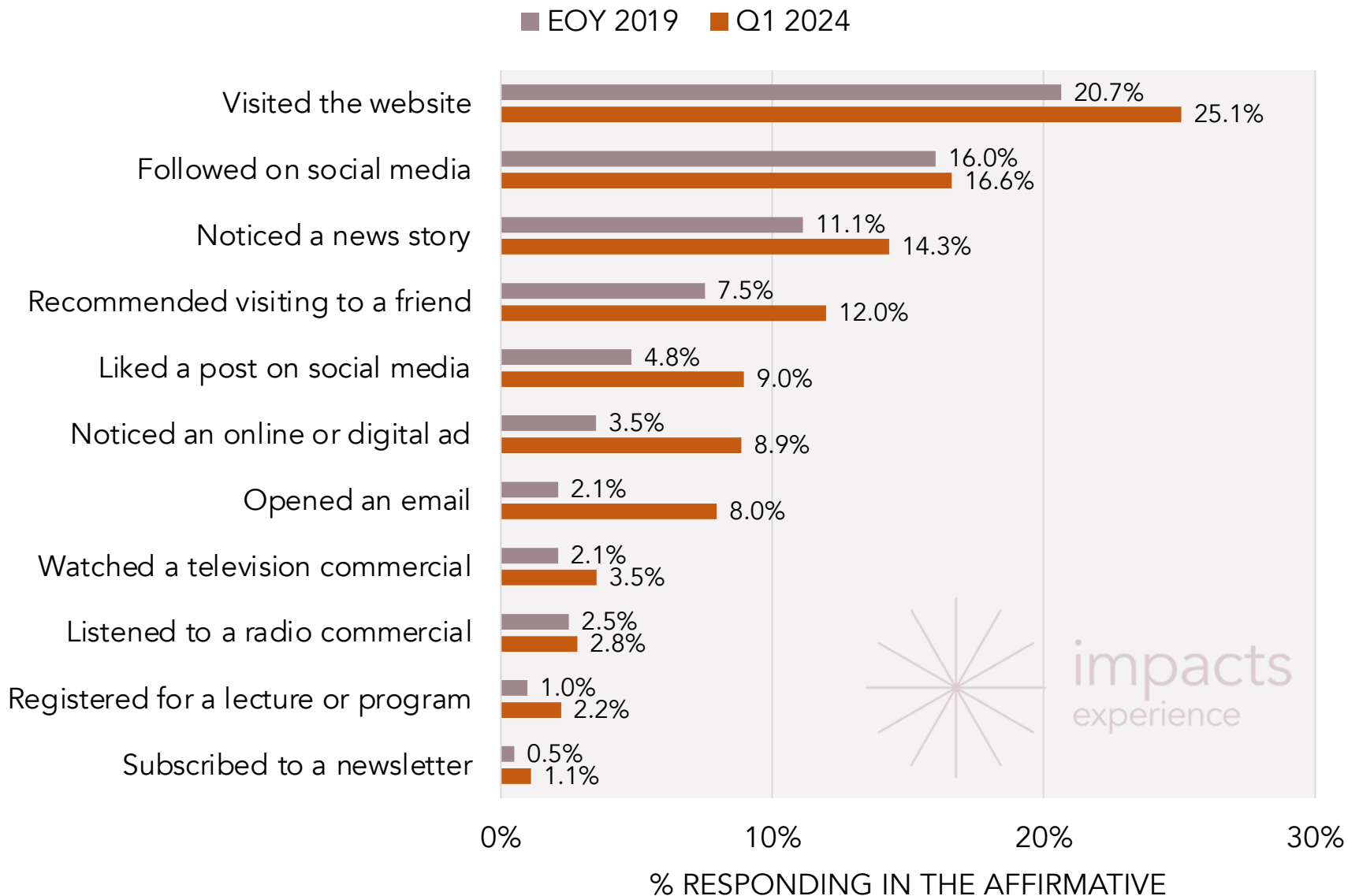
■ EOY 2019





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

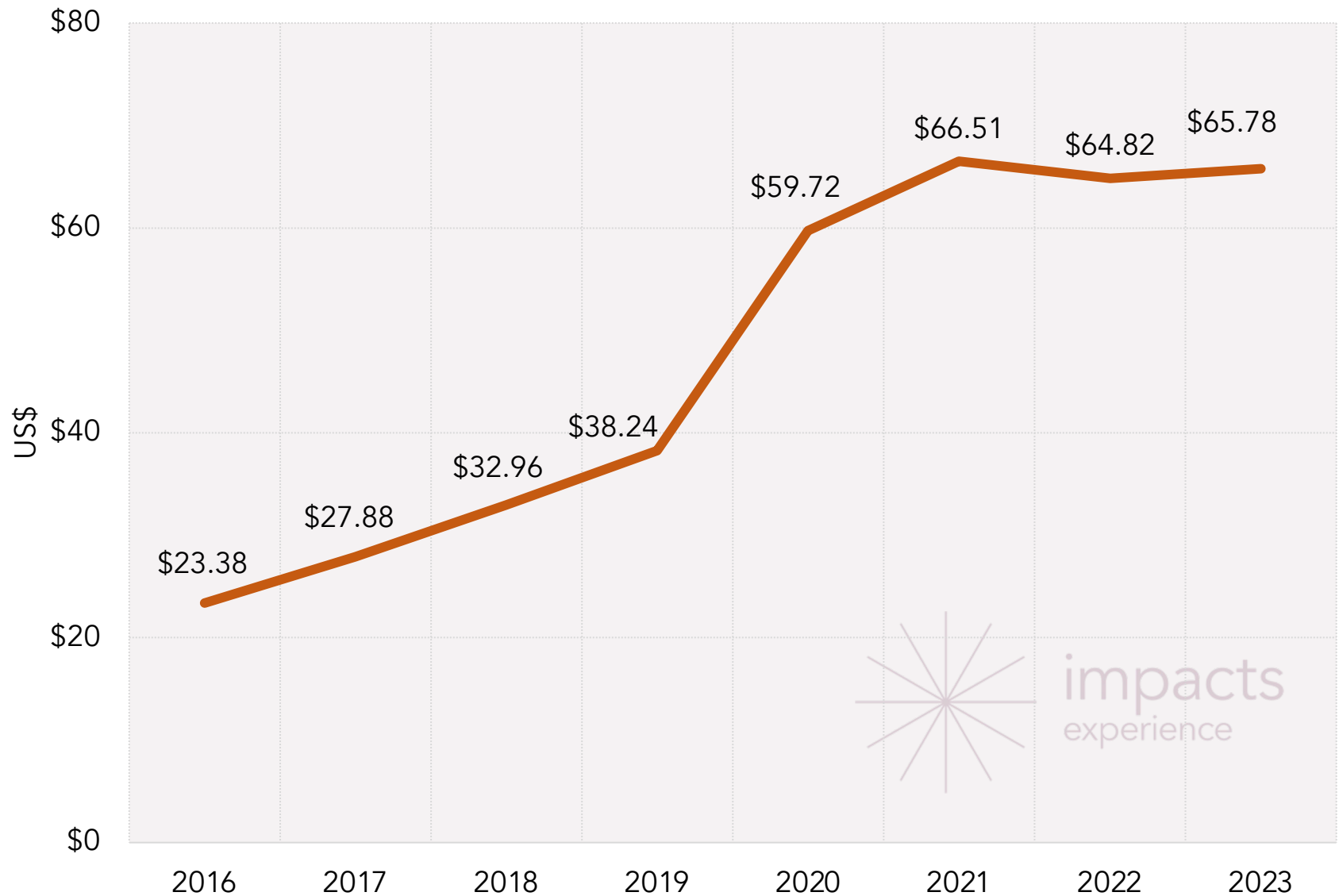
US adults with precedent unaided awareness, EOY 2019 v. Q1 2024 comparison  
81 organizations with retail stores



What might this mean for  
**museum retail?**

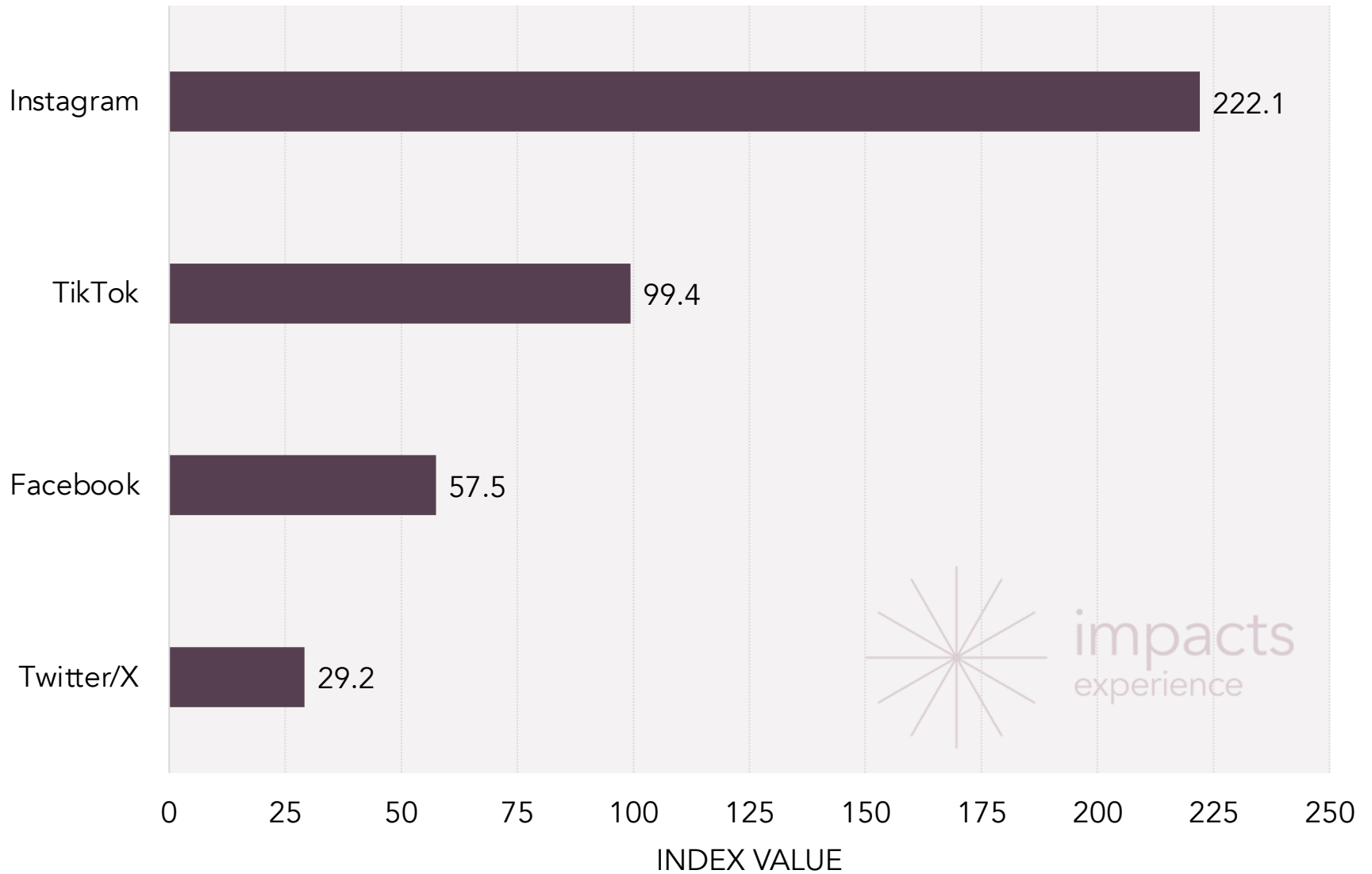
# Per transaction online spending

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



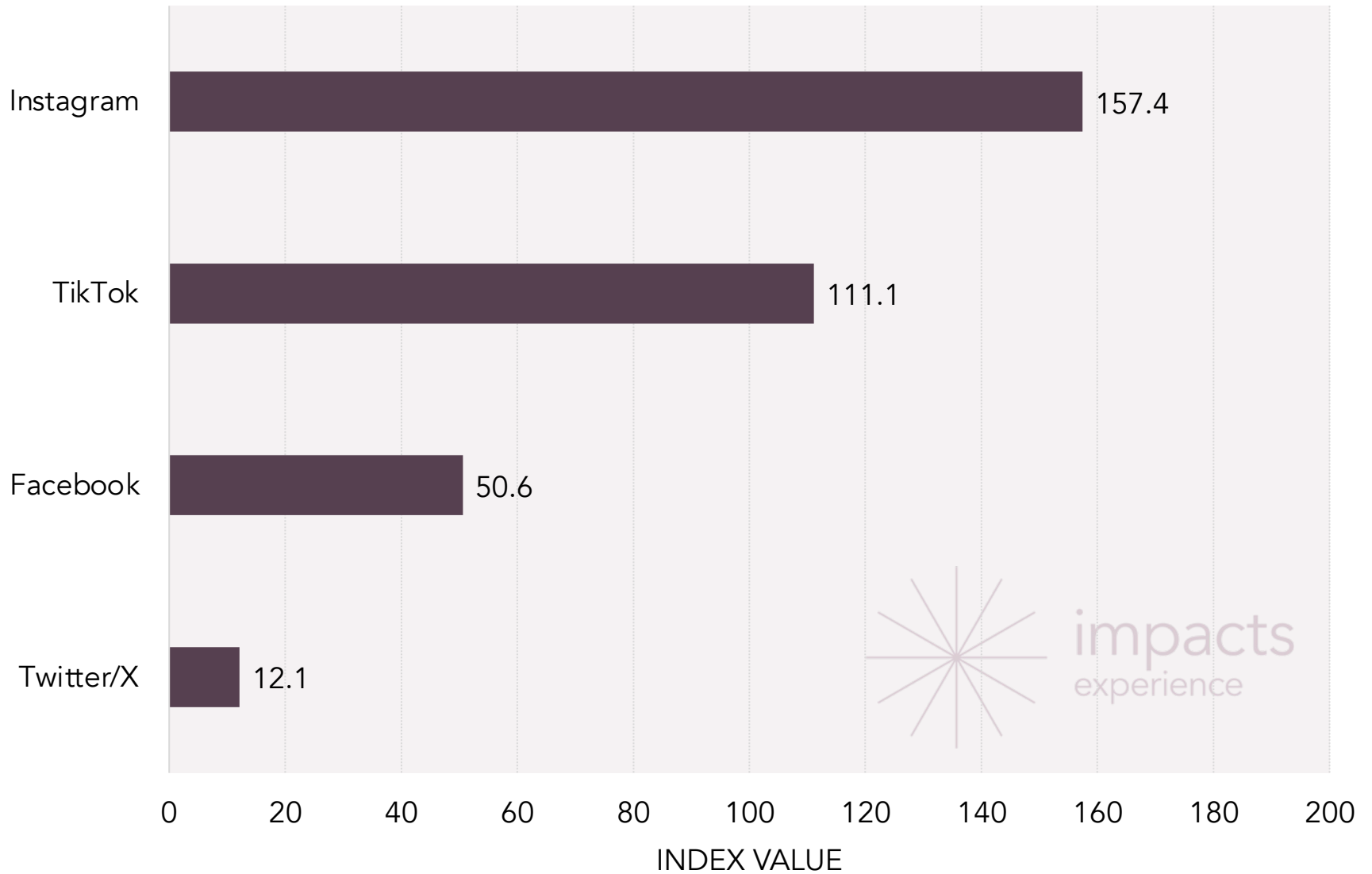
# Engagement by social media platform

US high-propensity visitors, exhibit-based organizations, EOY 2023



# Conversion by social media platform

US high-propensity visitors, exhibit-based organization, EOY 2023

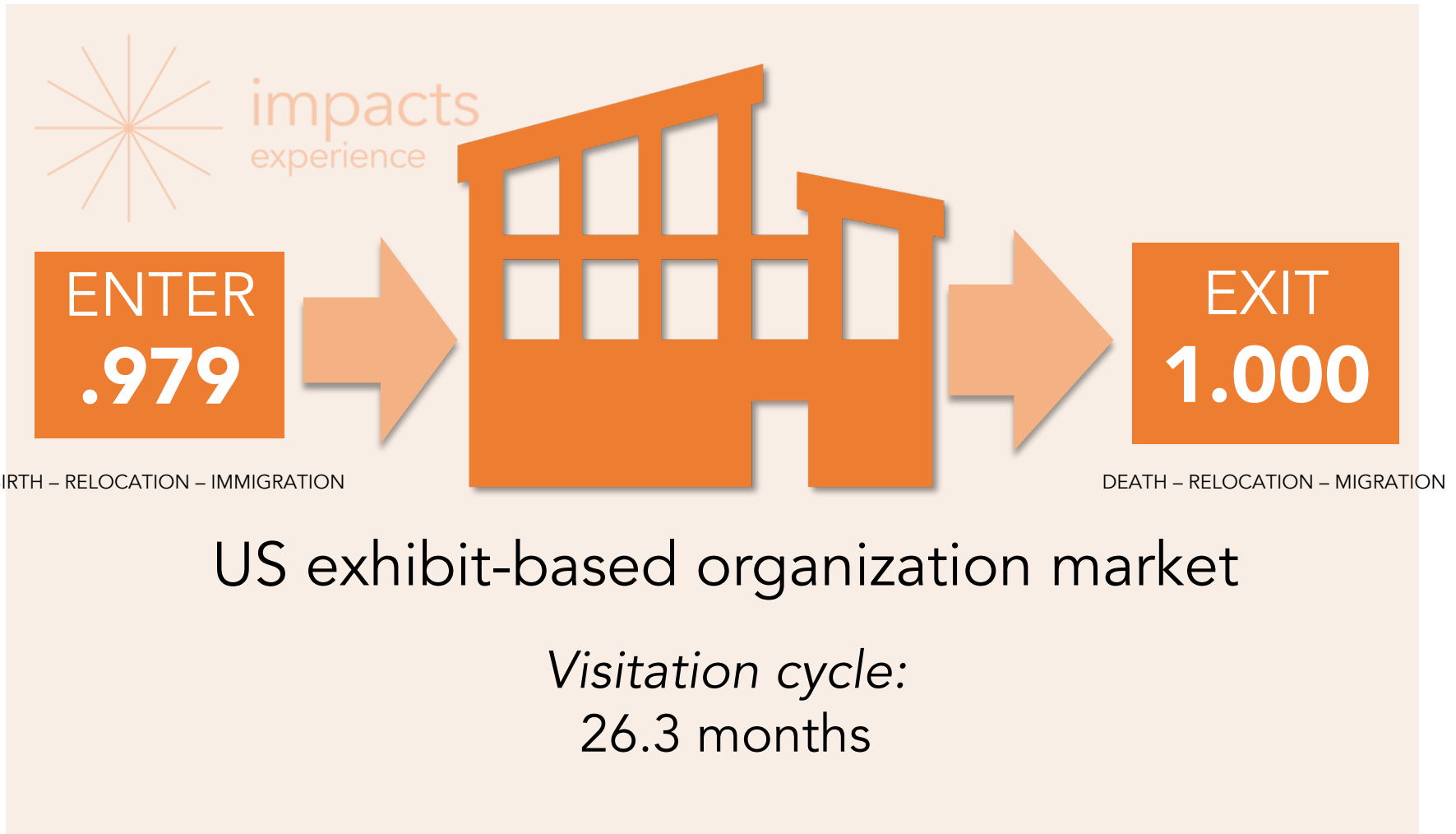


**Key takeaway:** Continue to meet audiences where they are – online.

# Welcoming Perceptions

# Current visitor substitution ratio

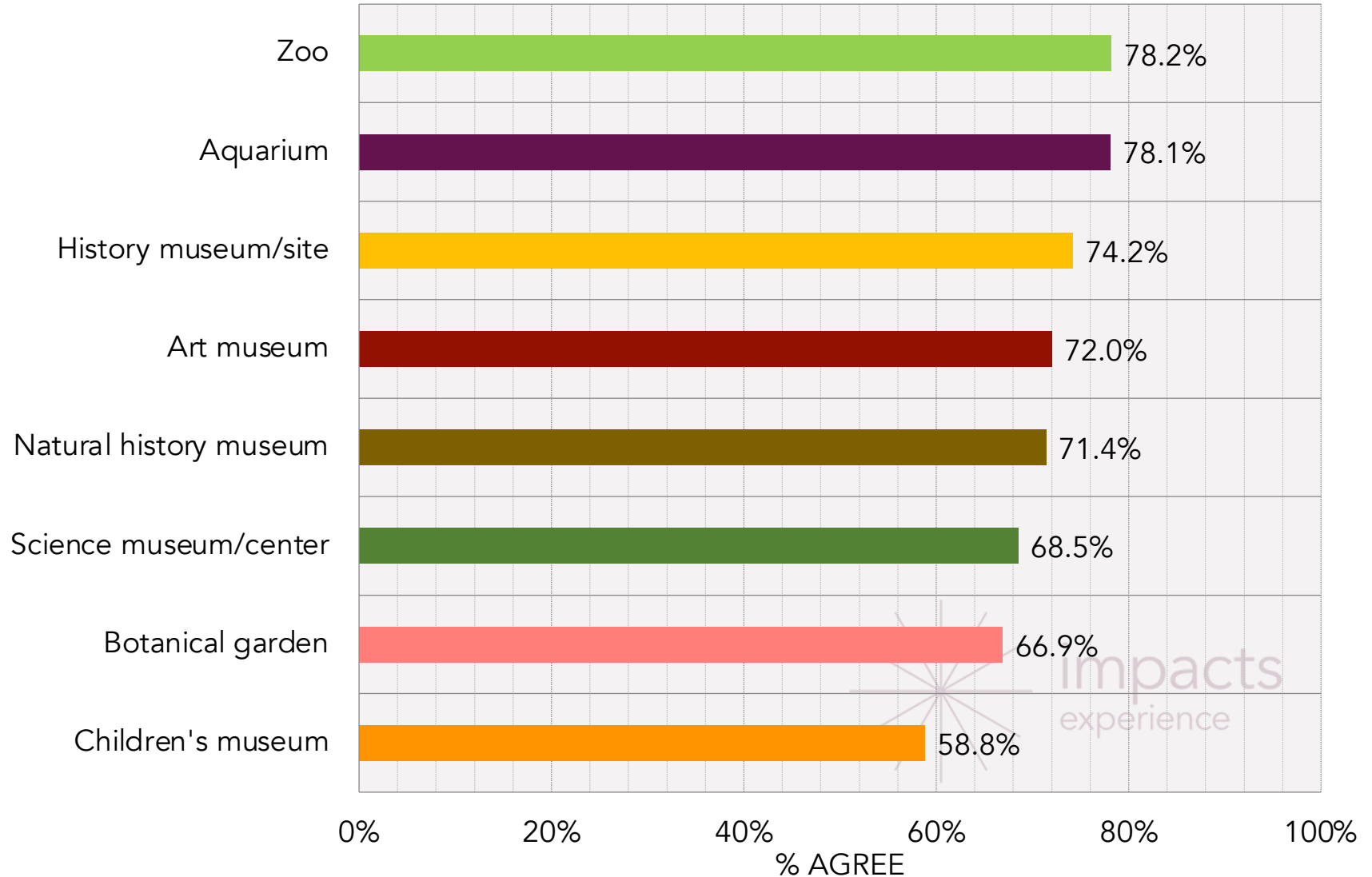
US **exhibition-based organizations**, Q1 2024





# [Exhibit-based organizations] are welcoming to people like me.

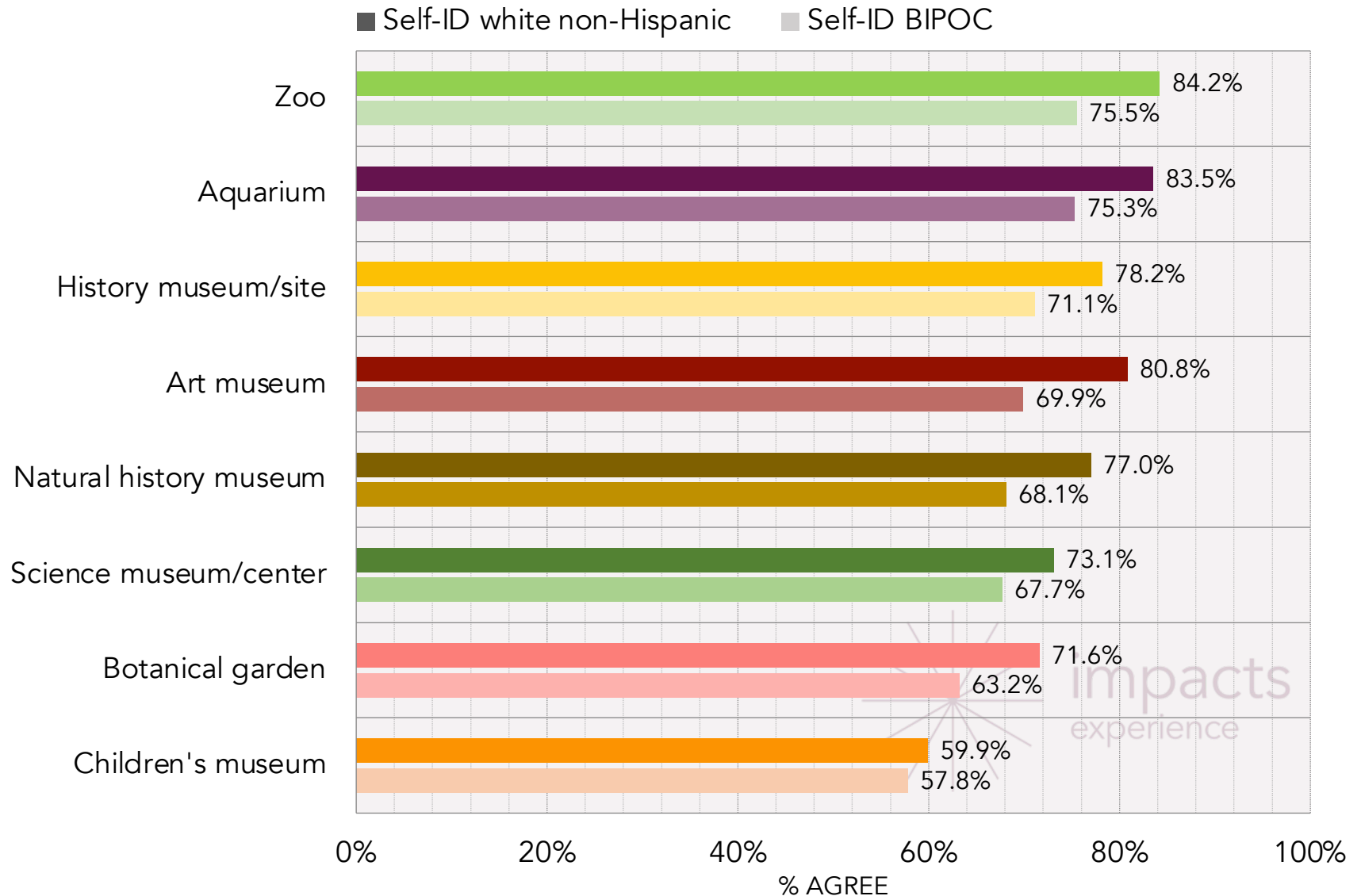
Percentage of Americans who "agree" or "strongly agree," Q1 2024



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# [Exhibit-based organizations] are welcoming to people like me.

Percentage of Americans who "agree" or "strongly agree," Q1 2024

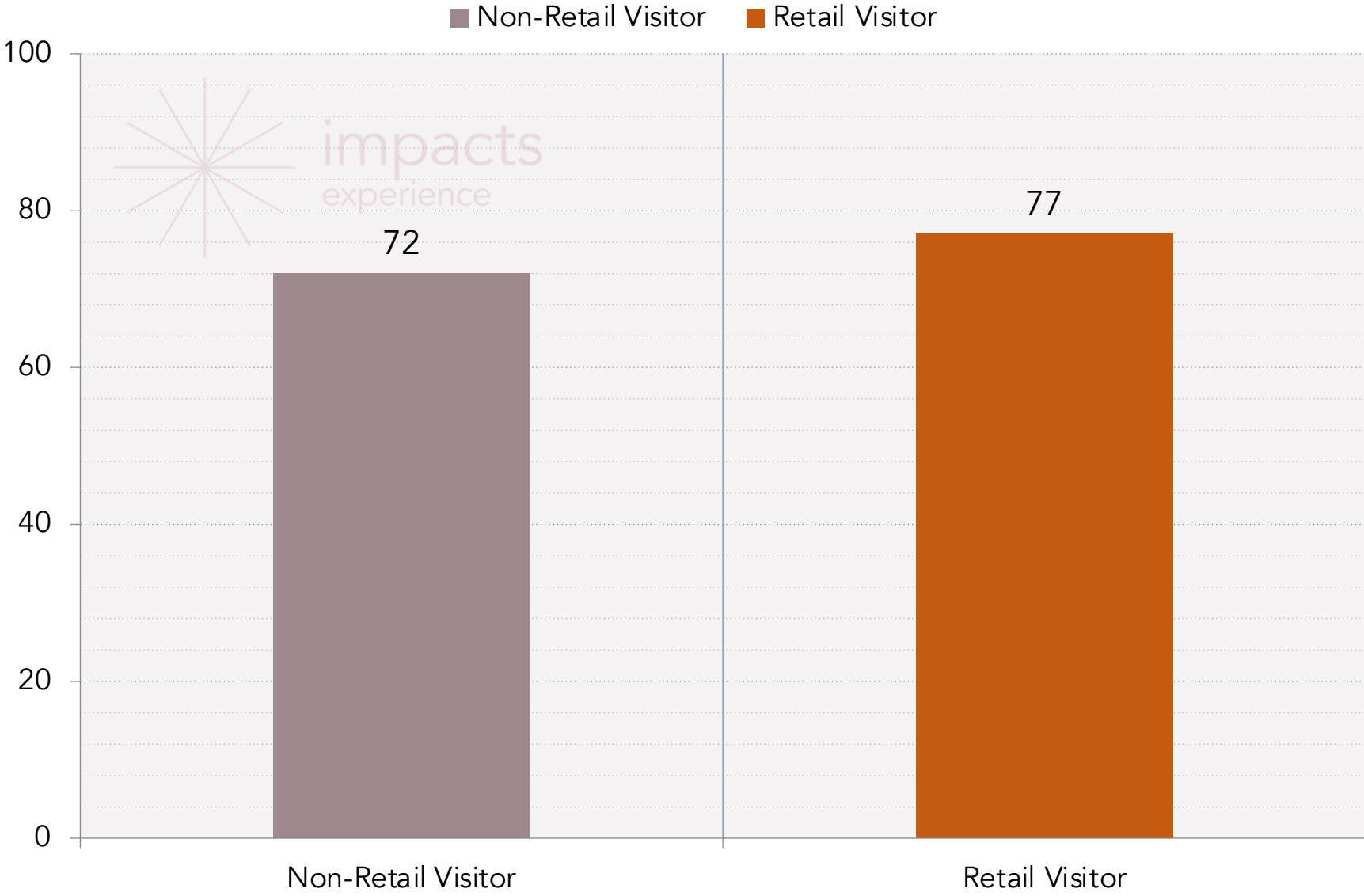


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Do retail visitors  
believe museums are  
**more welcoming** than  
non-retail visitors?

# The [museum] is welcoming to people like me.

Retail visitor and non-visitor comparison, EOY 2023



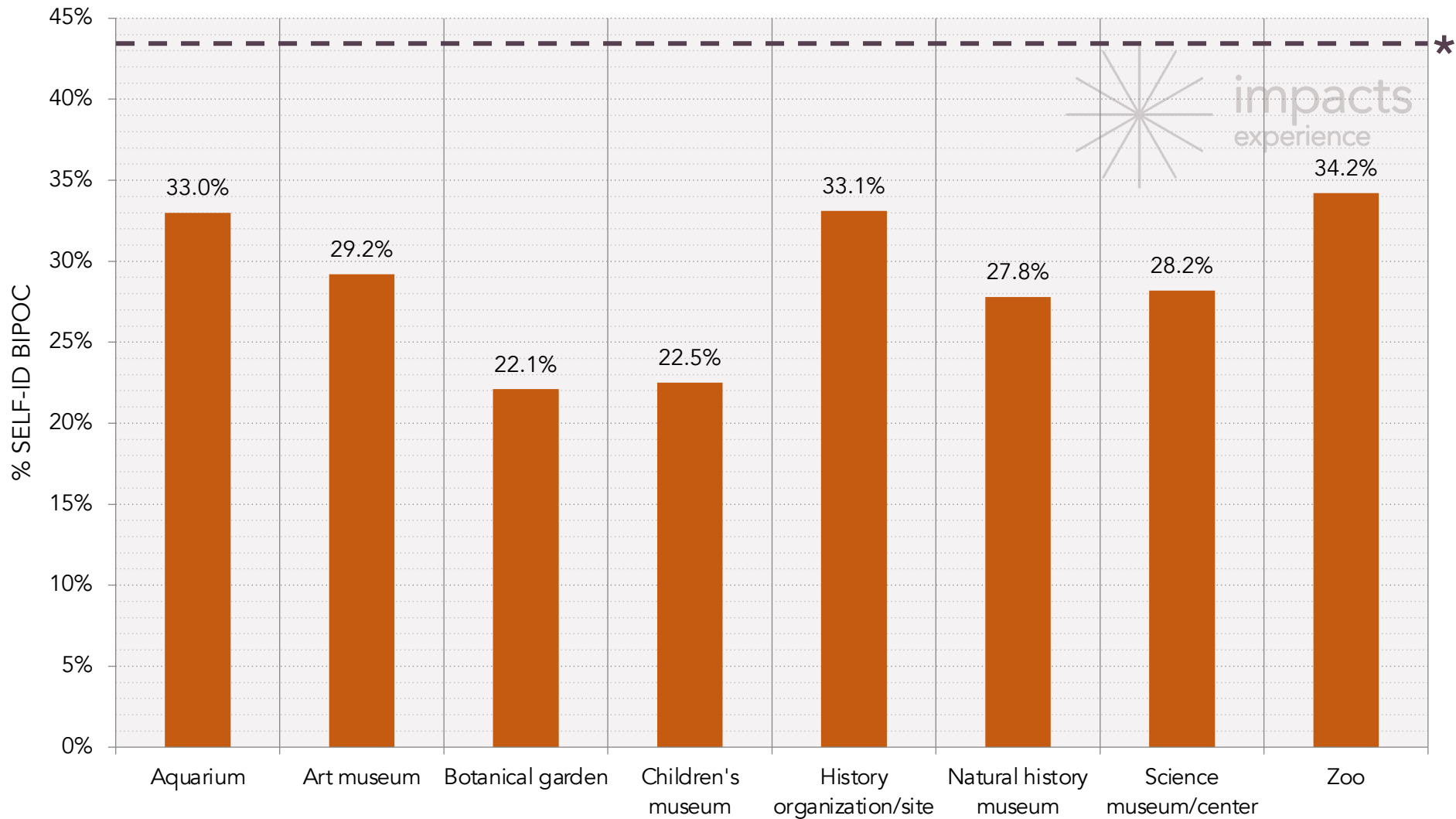
Yeah! Retail experiences **ROCK!**

But is that all that is going on here?

# Participation by exhibit-based organization type

## Self-identified BIPOC, onsite adult participation by type, EOY 2023

■ Attendance

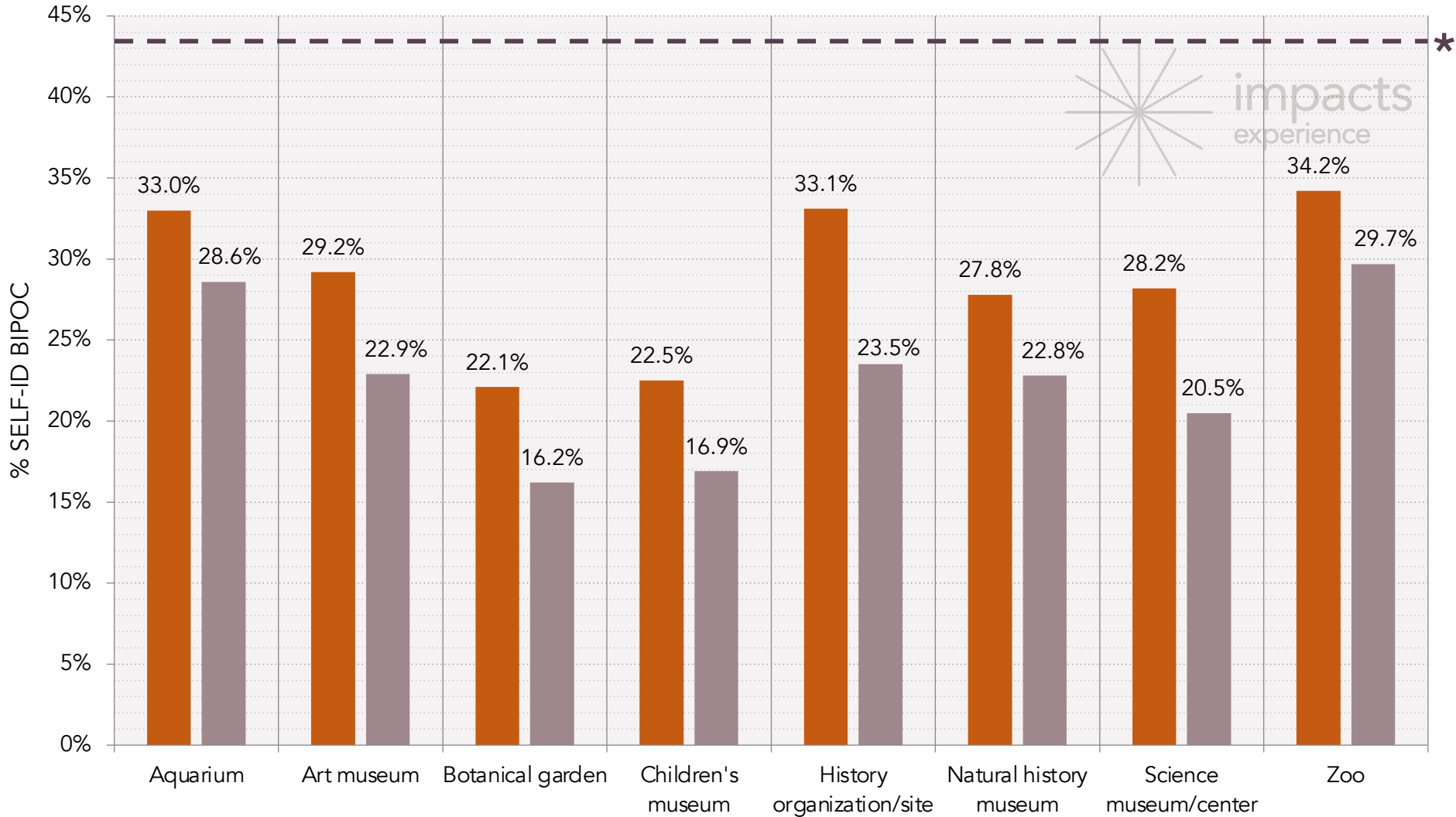


\* 43.4% of the US population self-identifies as BIPOC.  
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# Participation by exhibit-based organization type

## Self-identified BIPOC, onsite adult participation by type, EOY 2023

■ Attendance ■ Retail guest



\* 43.4% of the US population self-identifies as BIPOC.

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Retail guests tend to represent a less racially diverse subset of attendees.

However, retail operations have  
**two unique and exciting opportunities.**



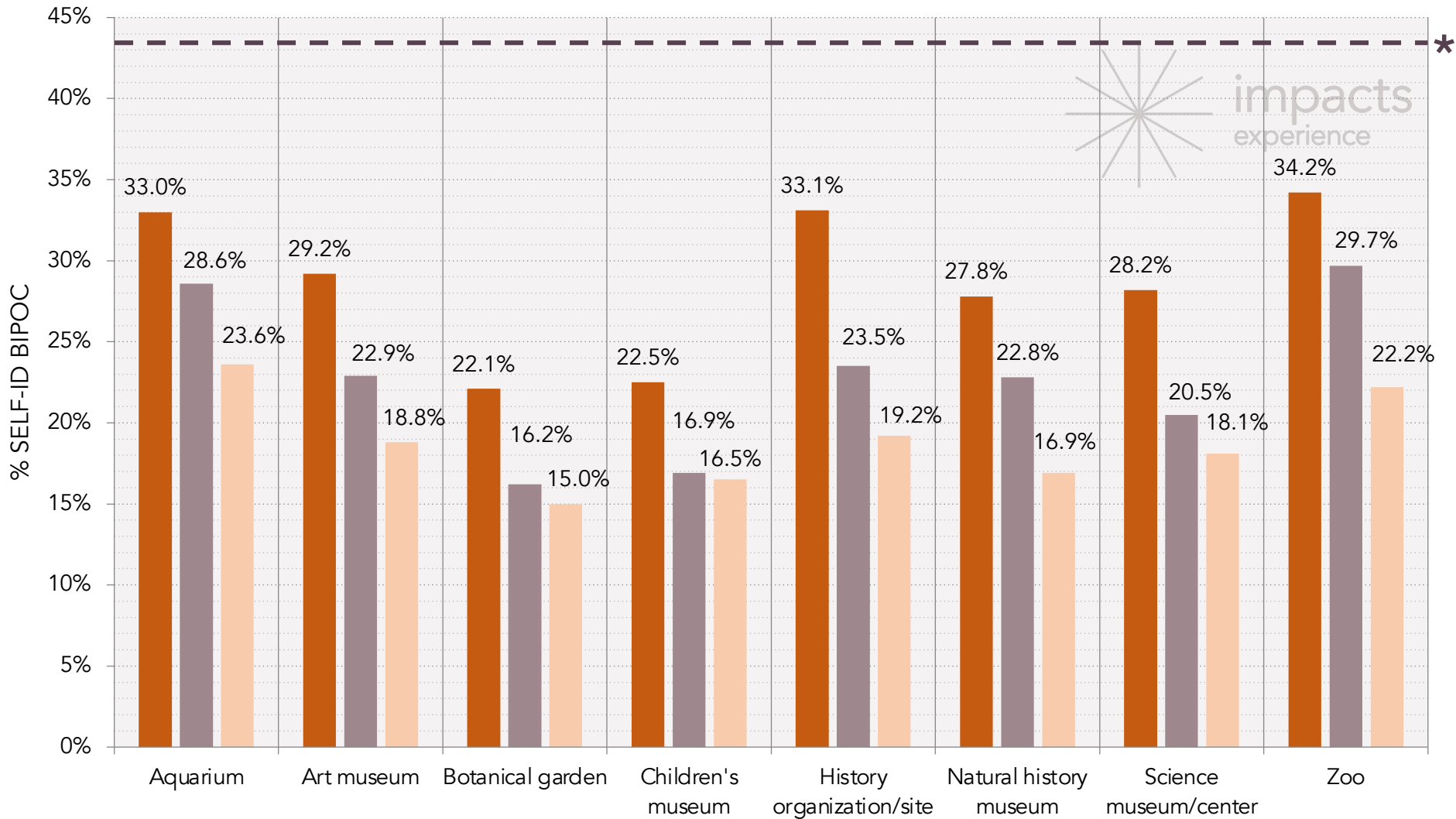
As a **reminder**, museum members are more likely to:

- **Visit** the museum store
- Be **motivated to visit** due to the retail store
- Make a museum retail **purchase**
- **Spend more money** per retail transaction

# Participation by exhibit-based organization type

## Self-identified BIPOC, onsite adult participation by type, EOY 2023

Attendance Retail guest Membership



\* 43.4% of the US population self-identifies as BIPOC.  
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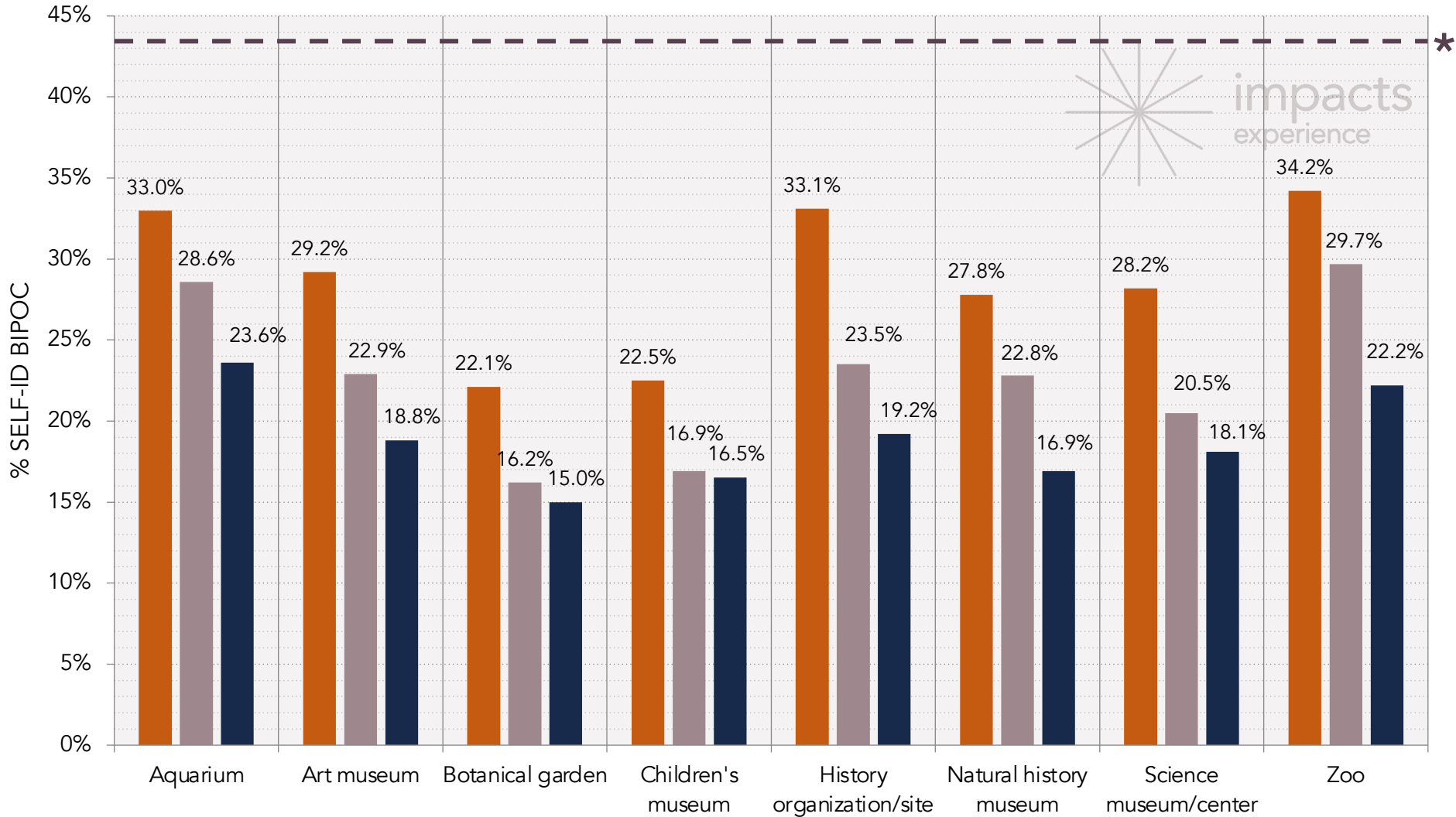
Retail operations **have an opportunity** to help diversify membership and supporters.

But what about  
museum retail  
**consumers?**

# Participation by exhibit-based organization type

## Self-identified BIPOC, onsite adult participation by type, EOY 2023

Attendance   Retail guest   Retail consumer

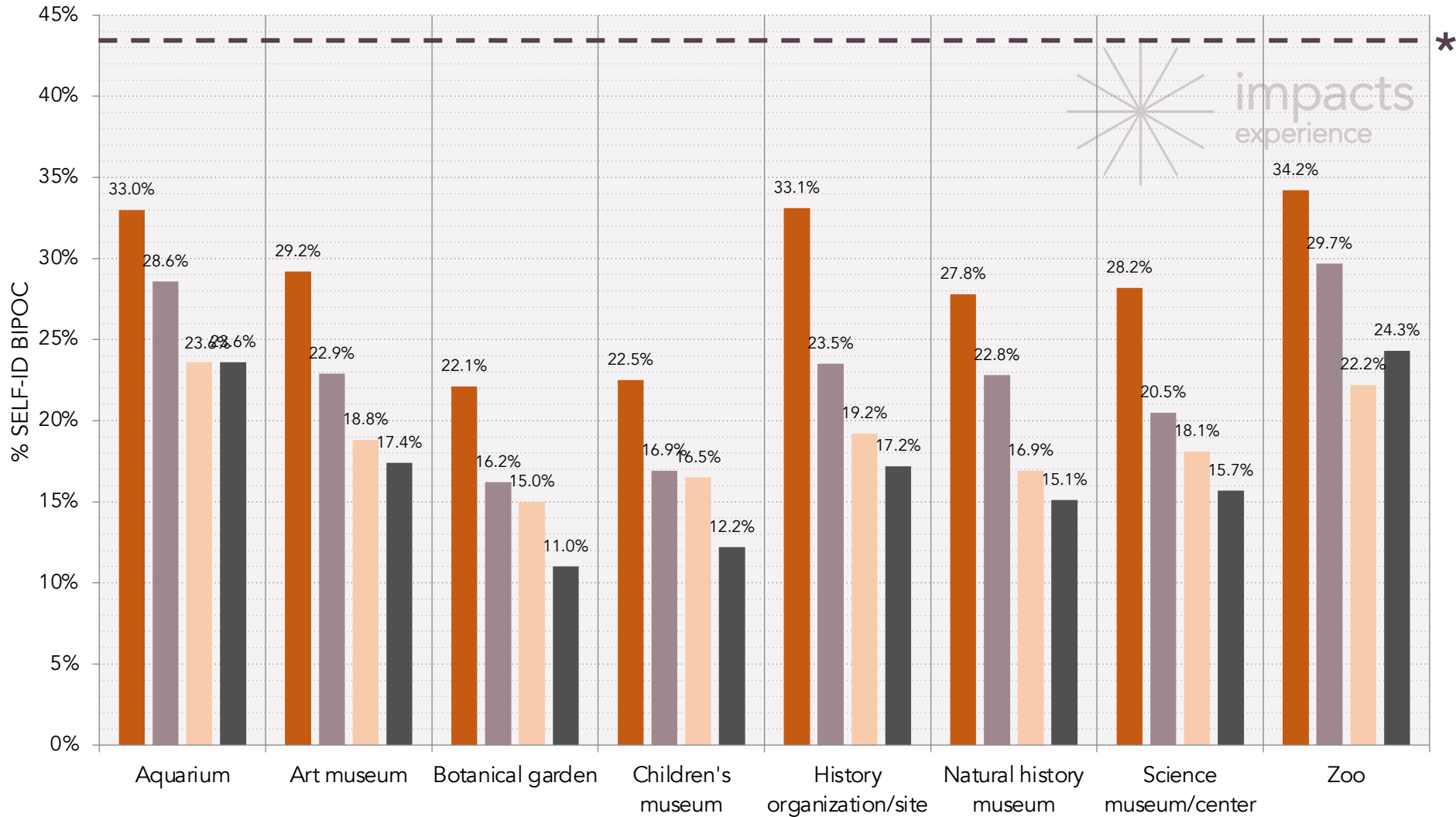


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# Participation by exhibit-based organization type

## Self-identified BIPOC, onsite adult participation by type, EOY 2023

Attendance   Retail guest   Membership   Retail consumer



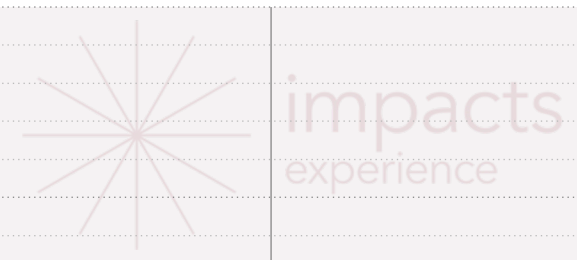
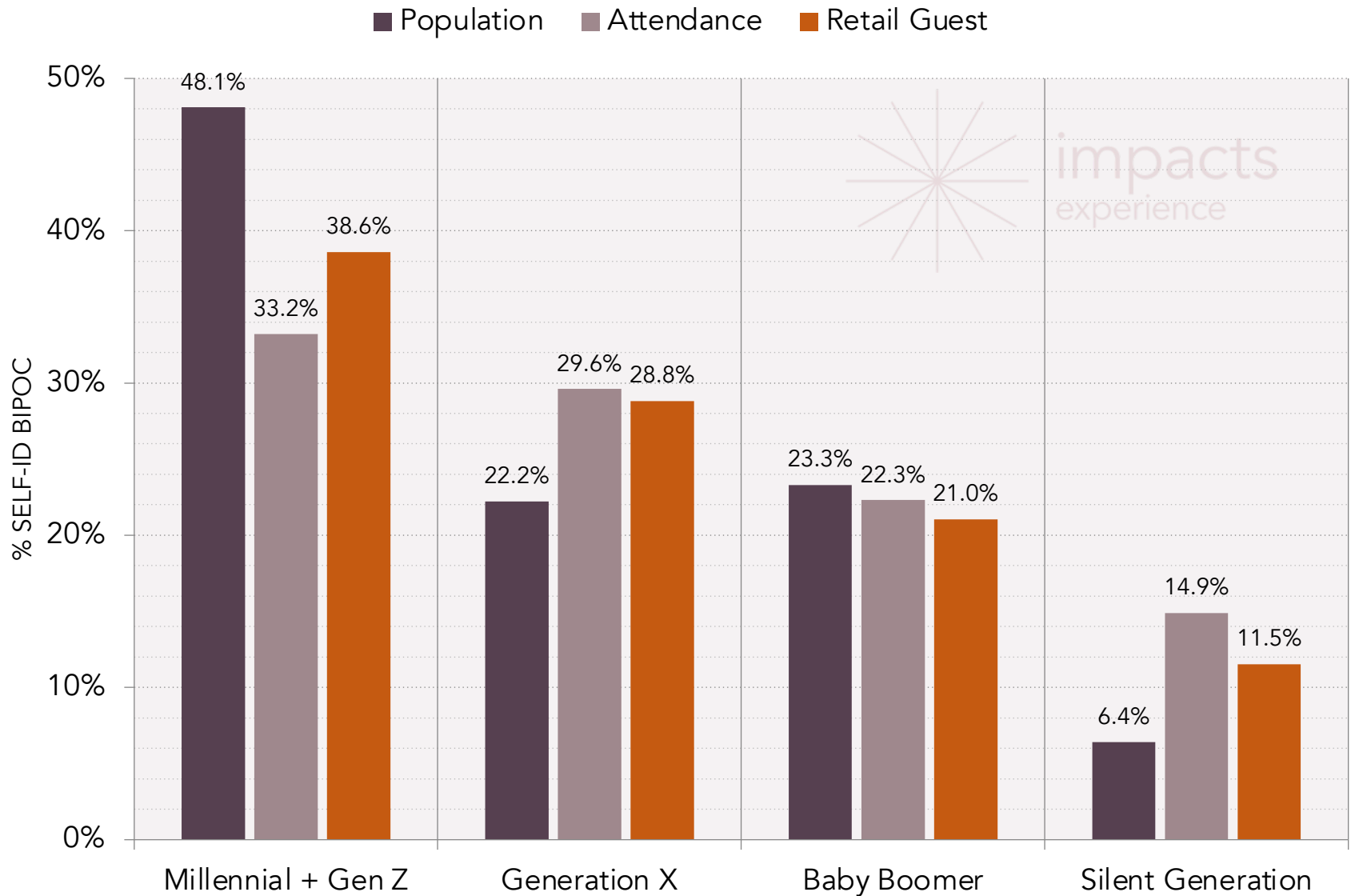
\* 43.4% of the US population self-identifies as BIPOC.  
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What **adult age group** makes up the greatest percentage of folks who browse the retail shop?

- A) Millennials and Generation Z
- B) Generation X
- C) Baby Boomers
- D) Silent Generation

# Participation by generation to **exhibit-based organizations**

Self-identified BIPOC, adult onsite participation, EOY 2023





Average age of  
overall visitor:

**38**

Average age of  
retail guest:

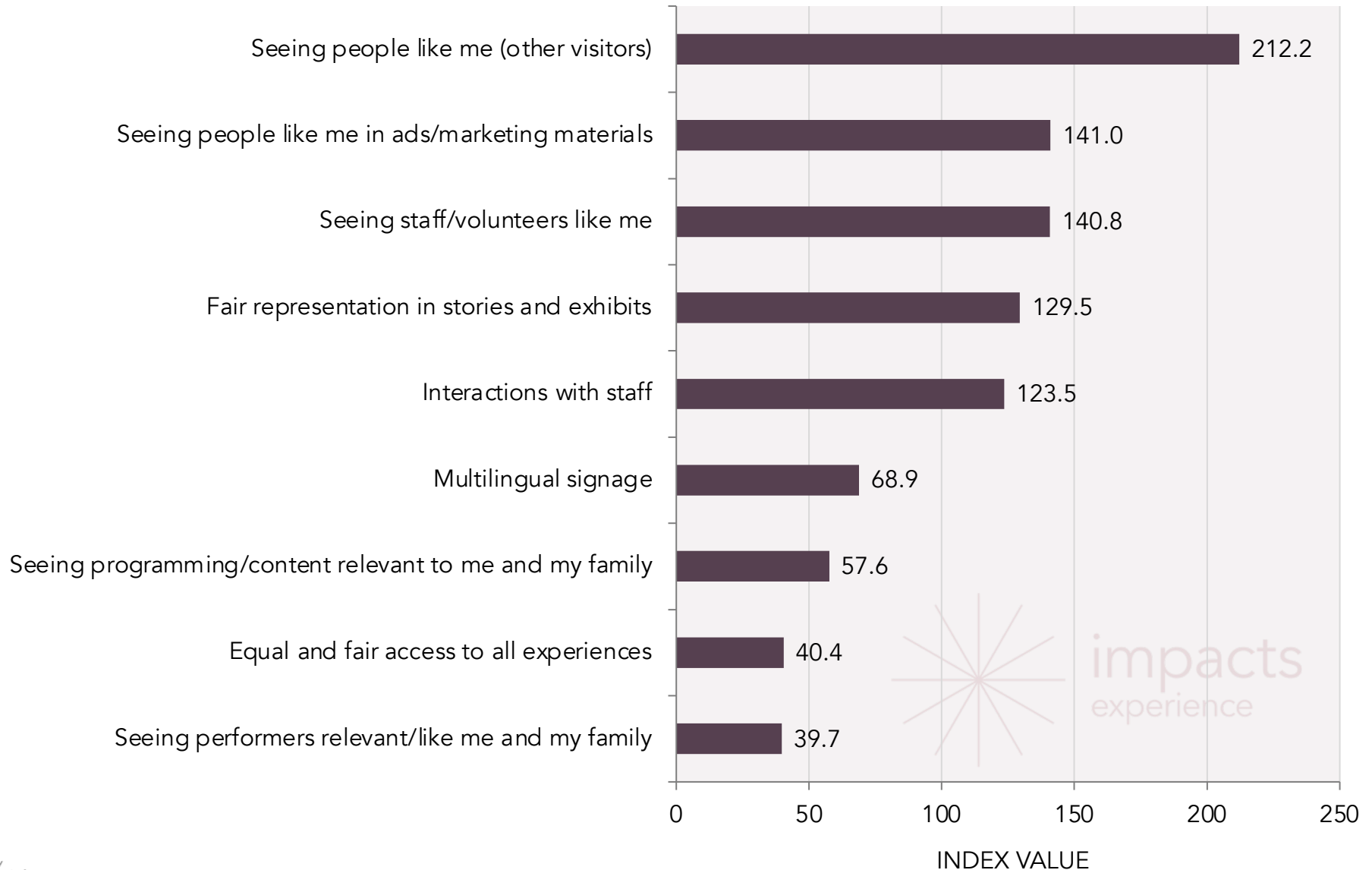
**34**

Adult retail visitors are younger than the overall visitor average, indicating **an opportunity** for leveraging earned endorsements to attract younger guests to the museum.

How can museums (and museum retail)  
provide a **welcoming experience**?

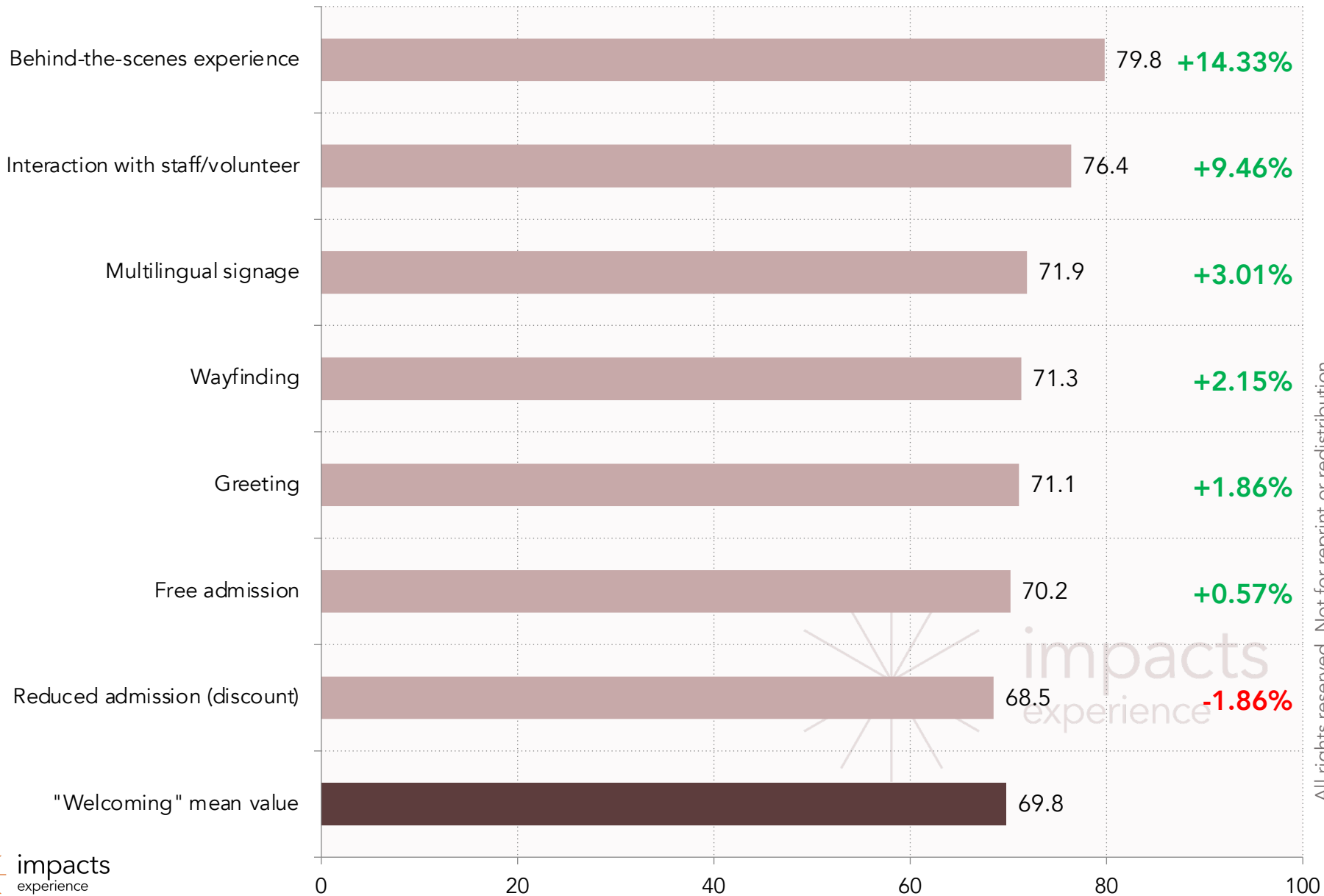
# How do Americans describe a "welcoming" experience at [cultural organization]?

US visitor-serving organizations, EOY 2023



# Welcoming perception metric by guest experience factor

EOY 2023, US visitor-serving organizations



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How can we be **more welcoming?**

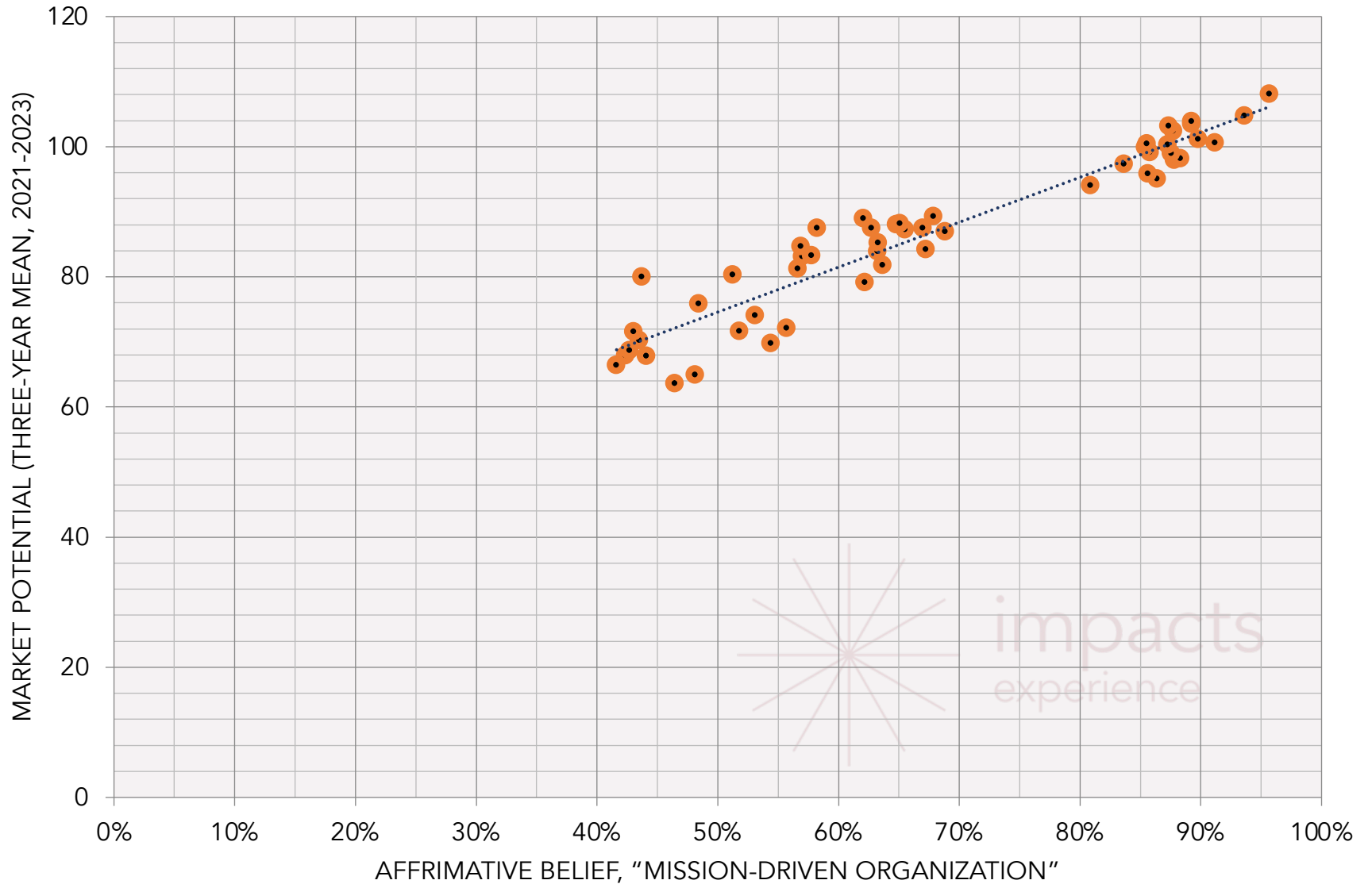
Again, it's about people.

# Mission **Relevance**

Being **good at your mission**  
is good for business.

# Bivariate relationship analysis

"Mission-driven organization" belief relative to realized market potential  
US exhibit-based organization, Three-year analysis (2021-2023)

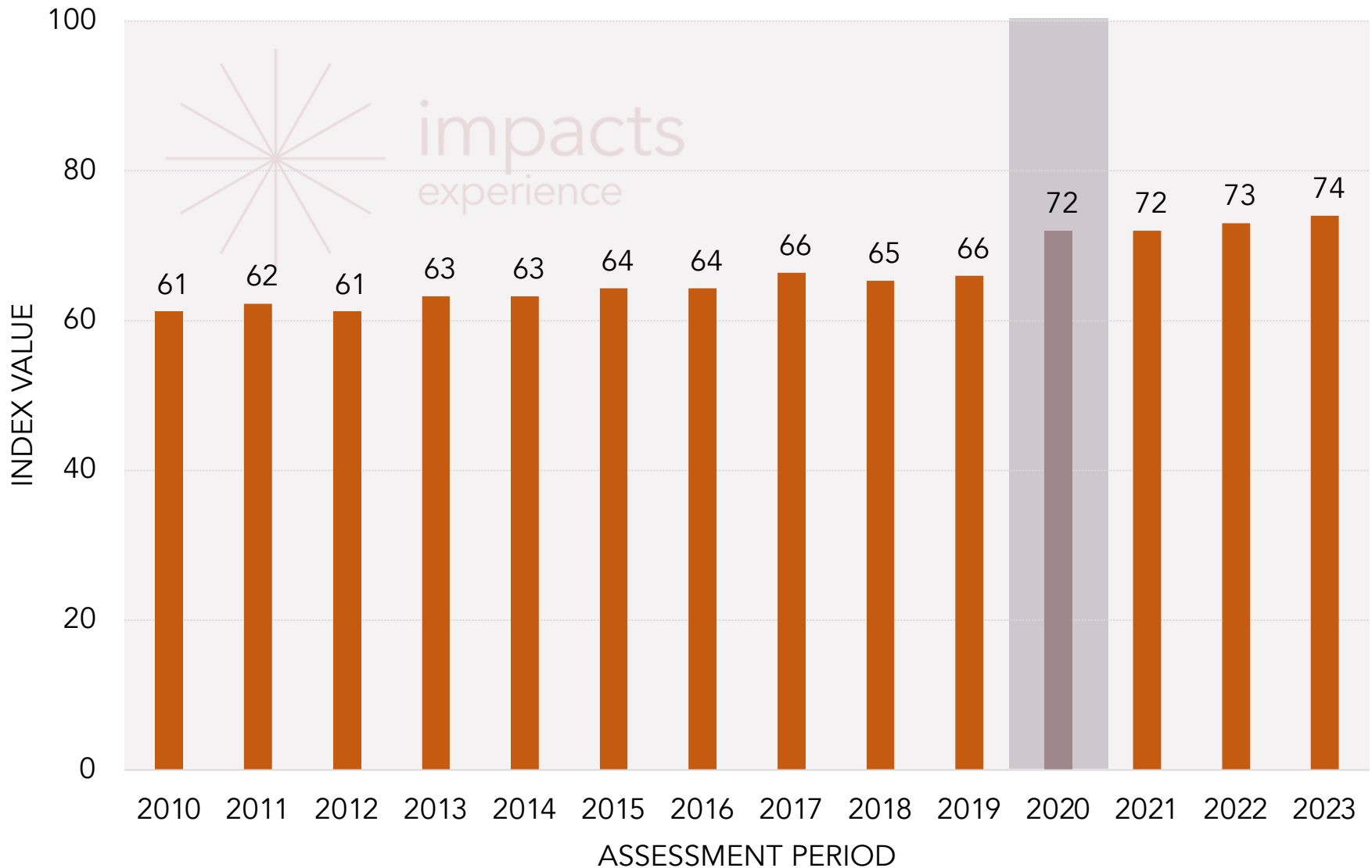




Something **interesting**  
happened during the  
pandemic...

# Public perception as mission-driven organization

US **exhibit-based organization** trend analysis, EOY 2010-2023




Museums moved from  
mostly these messages...

**VISIT  
TODAY**

**RESERVE  
YOUR  
SPOT**

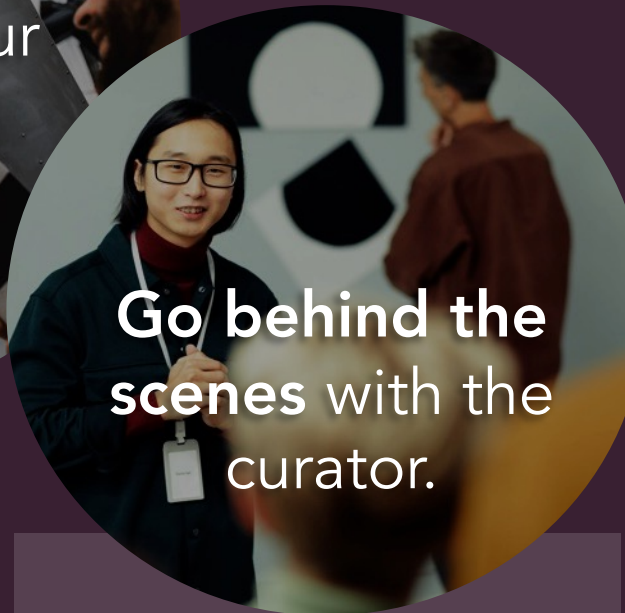
**GET  
YOUR  
TICKET**



**Learning at  
home?**  
Check out our  
educational  
resources.



How do our  
**conservators**  
care for the  
collections?

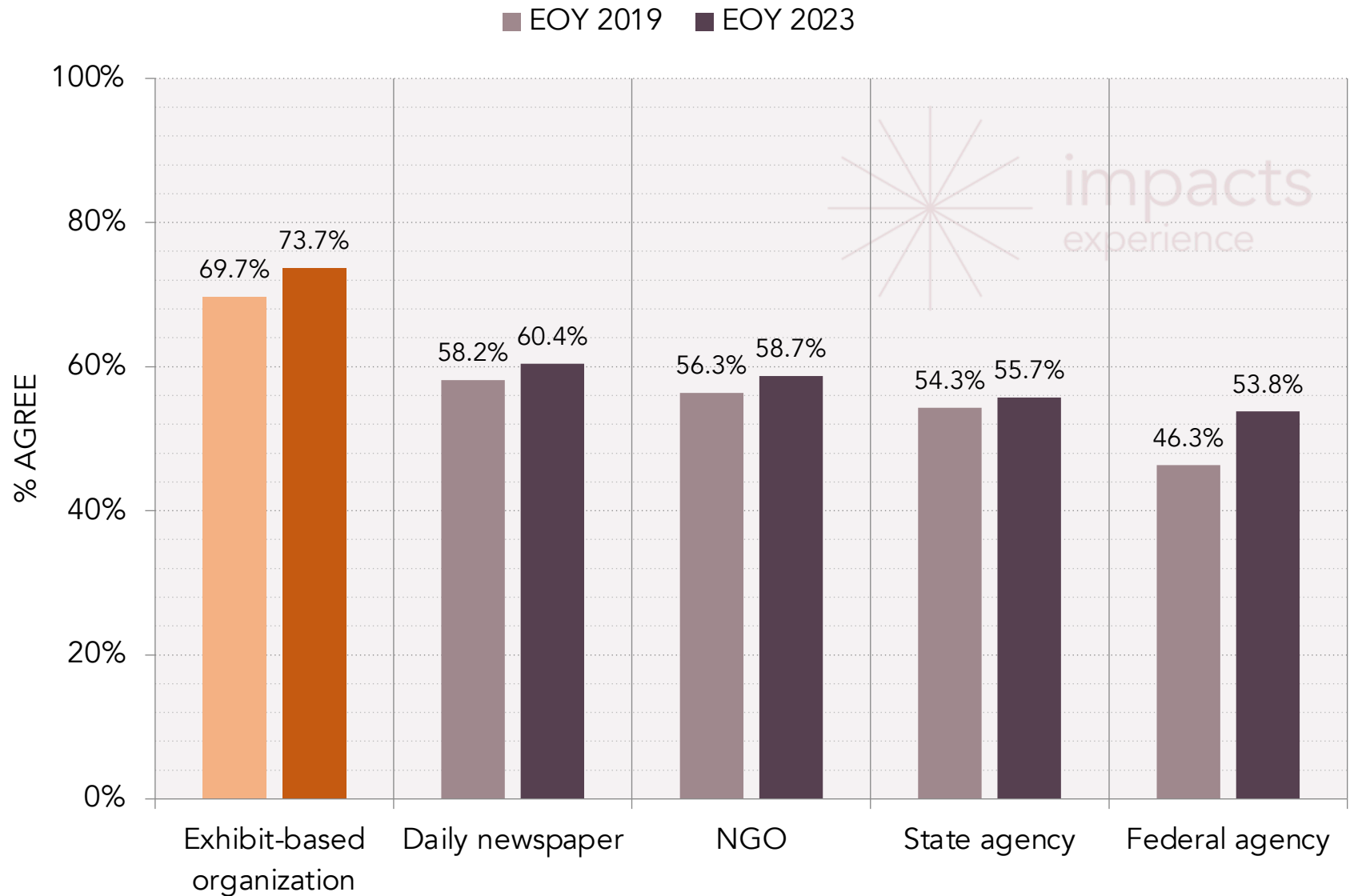


**Go behind the  
scenes with the  
curator.**

...to these.

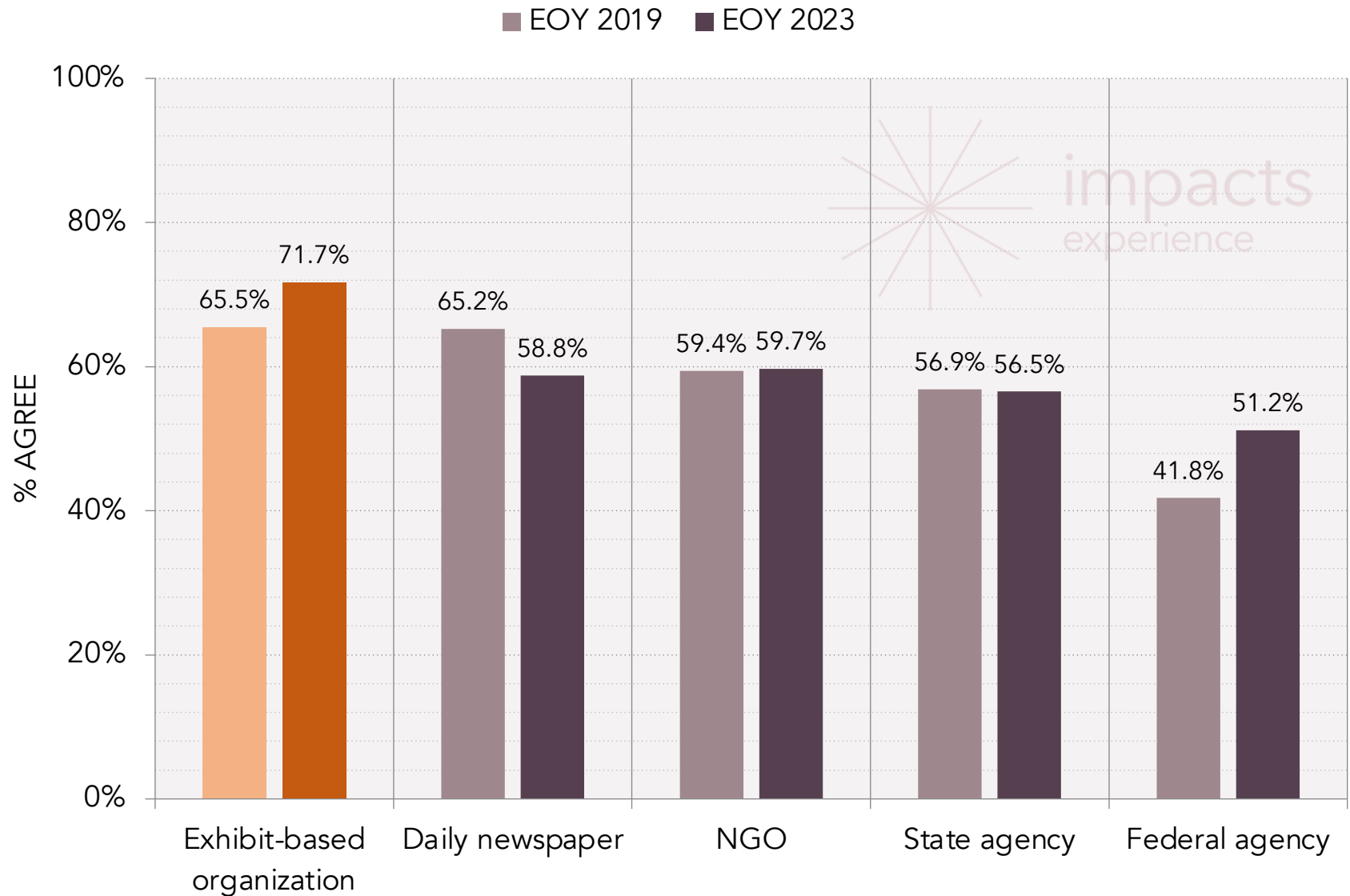
# I trust the ...

US adults, percentage of respondents who "agree" or "strongly agree," EOY 2023



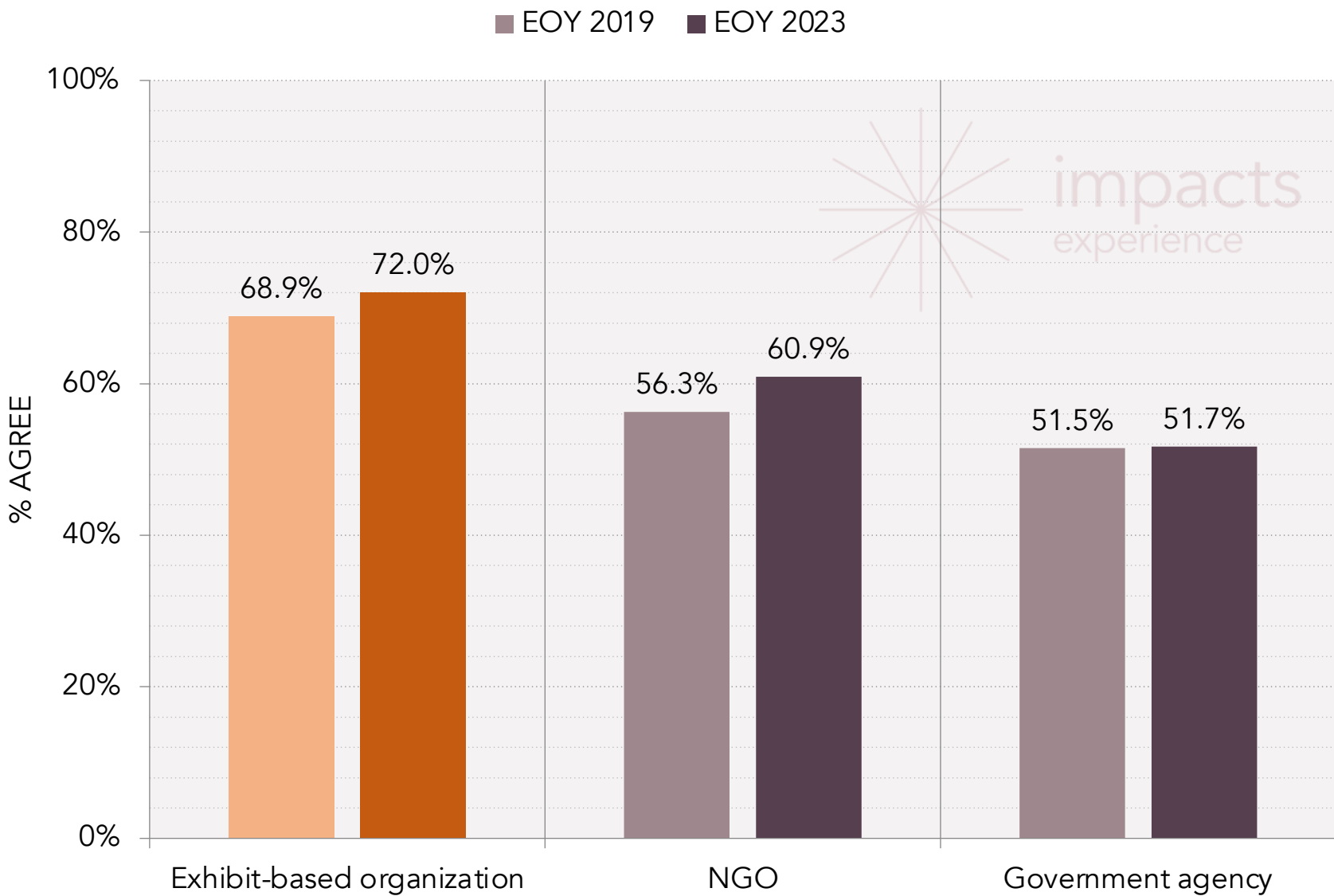
# ... is a highly credible source of information.

US adults, percentage of respondents who "agree" or "strongly agree," EOY 2023



# The ... should suggest or recommend certain behaviors or ways for the public to support its causes and mission.

Percentage of respondents who "agree" or "strongly agree," EOY 2023



How does this relate to  
**retail experiences?**

Remember this?

# “What are the best things about the [museum retail experience]?”

Lexical analysis by descending frequency of mention  
81 cultural organizations with retail stores, Q1 2024

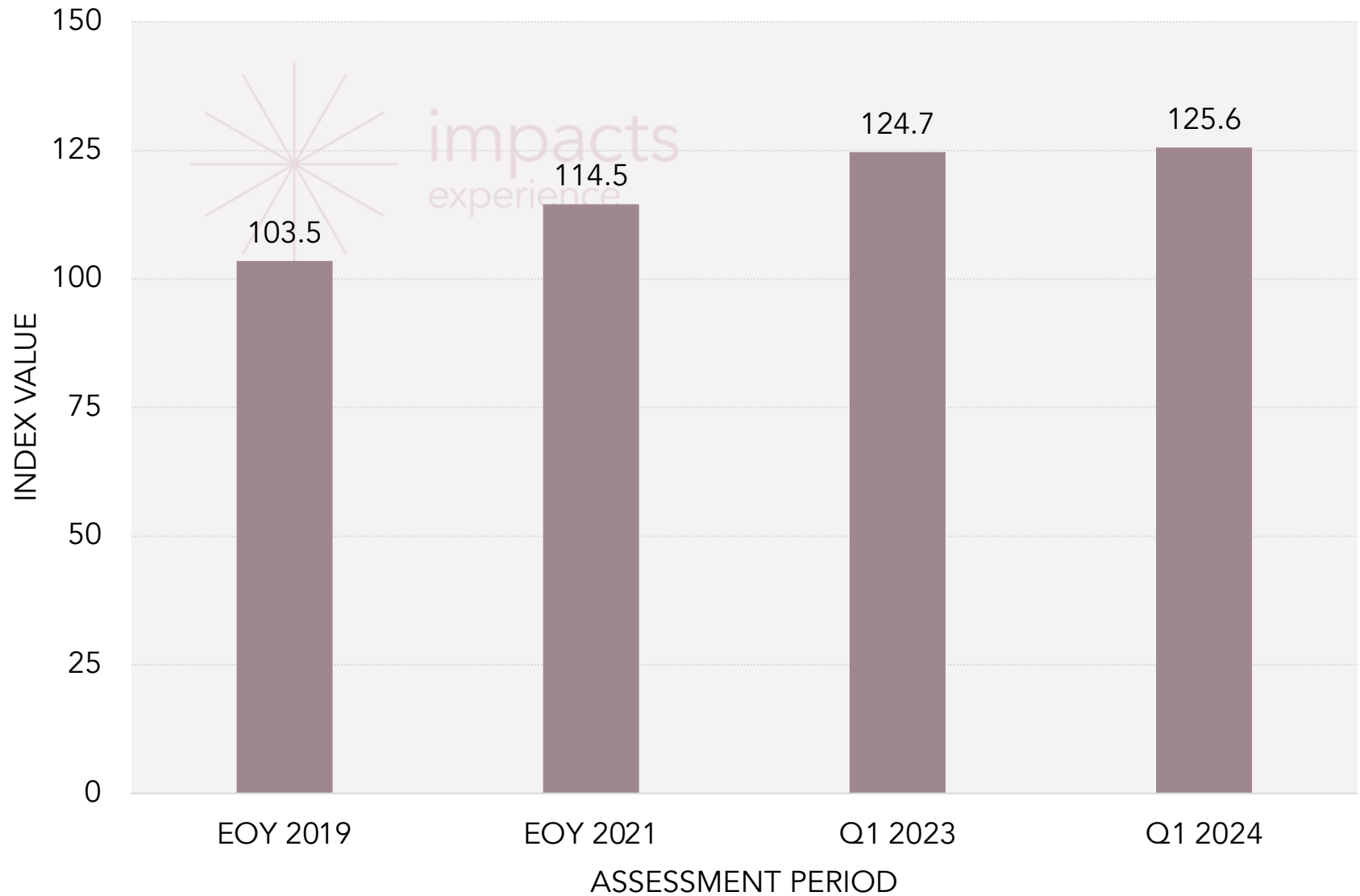
RANK	DESCRIPTION	INDEX
1	Unique merchandise (only available at location)	229.8
2	<b>Supporting the organization</b>	<b>125.6</b>
3	Finding gifts for friends/family (adult)	118.5
4	Finding gifts for child	102.6
5	Friendly/helpful staff	101.9





# "Supporting the organization"

Temporal analysis, 2019-2024

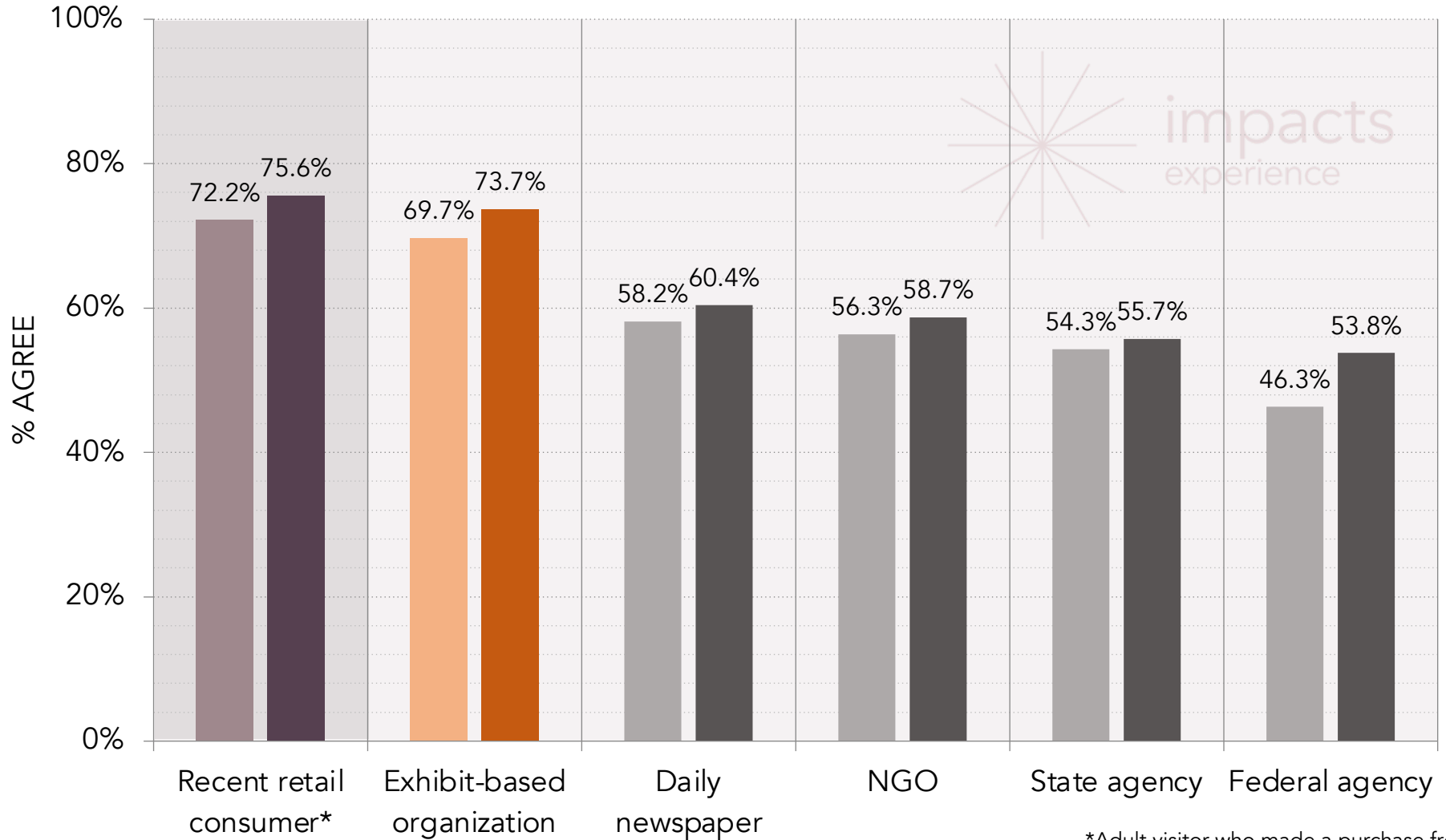


Purchasing something from the retail shop can **reinforce our identities** and create **positive associations** with the museum.

# I trust the ...

US adults, percentage of respondents who "agree" or "strongly agree," EOY 2023

■ EOY 2019 ■ EOY 2023

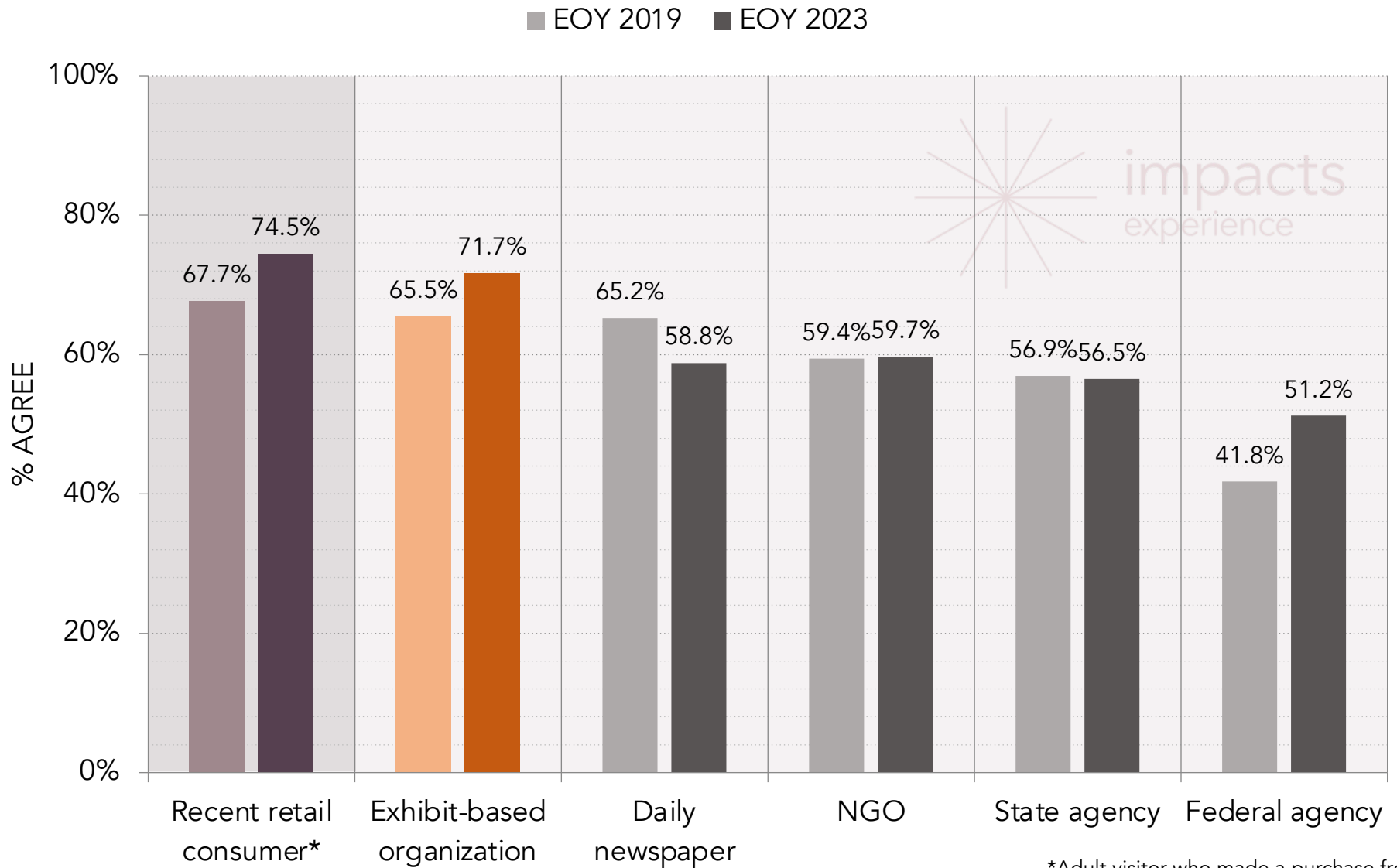


\*Adult visitor who made a purchase from a museum store within the past year.

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# ... is a highly credible source of information.

US adults, percentage of respondents who "agree" or "strongly agree," EOY 2023



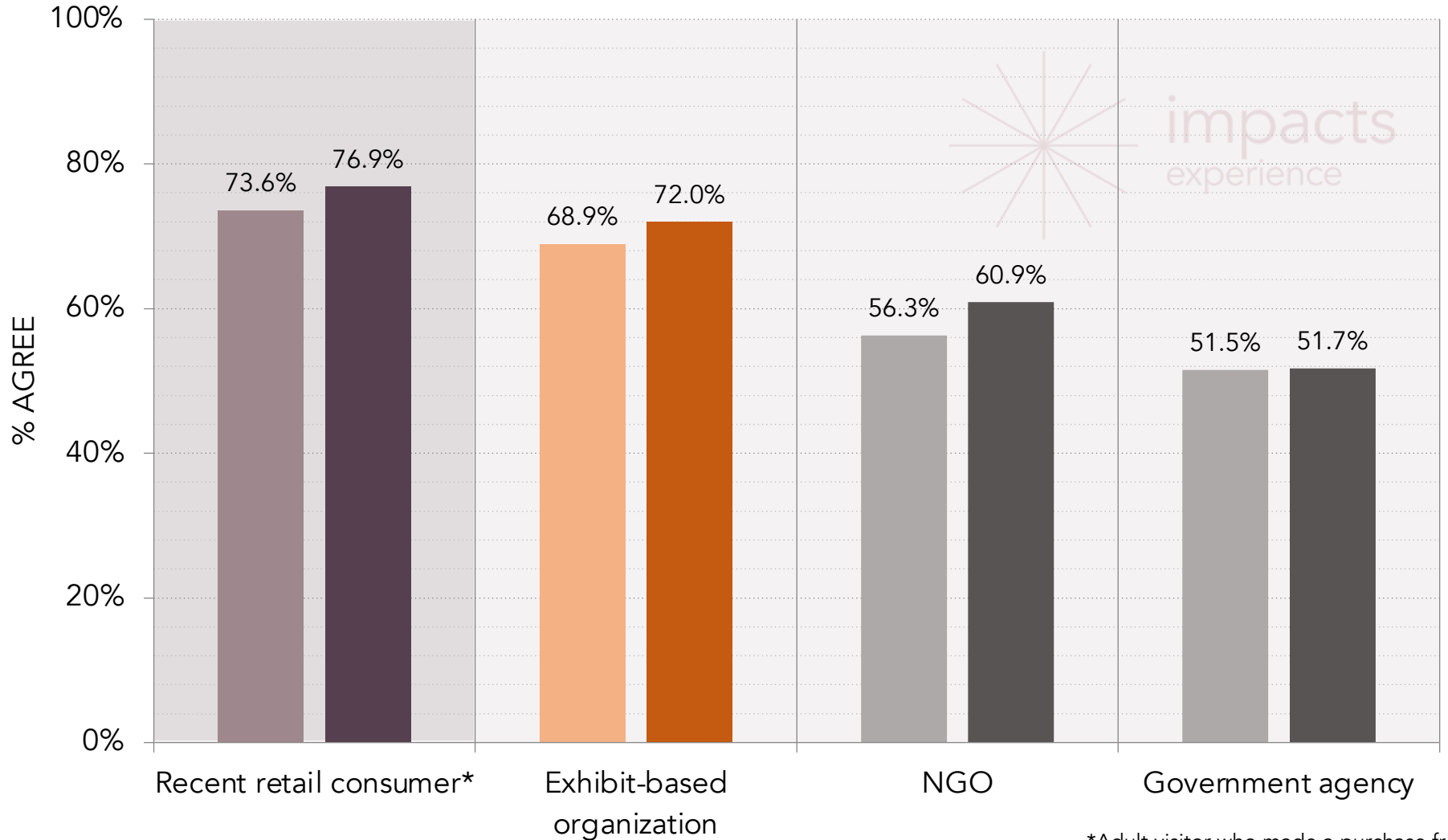
\*Adult visitor who made a purchase from a museum store within the past year.

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# The ... should suggest or recommend certain behaviors or ways for the public to support its causes and mission.

US adults, percentage of respondents who "agree" or "strongly agree," EOY 2023

■ EOY 2019 ■ EOY 2023



\*Adult visitor who made a purchase from a museum store within the past year.

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The people who visit a museum's retail experience tend to be **more satisfied, more likely to recommend the organization, more likely to return...**

And they are looking **even more to your museum's mission** and how it elevates the community.

Trends related to **museum retail experiences** can help strengthen the strategic direction of the entire museum.

**Digital**  
engagement

Welcoming  
**perceptions**

**Mission**  
relevance

Keep going.



a data-informed resource  
for cultural executives

# KYOB+

## INDIVIDUAL



## PREMIUM



## ENTERPRISE



## PREMIUM ELITE



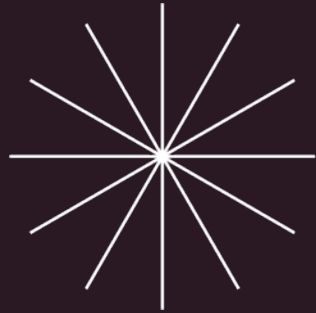
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