



# Unpacking exhibitions

Exploring the market for paid-for exhibitions at London's cultural venues

TEM 2015  
Istanbul  
September 2015

Gerri Morris

▶ morris  
▶ hargreaves  
▶ mcintyre

# **Introducing Morris Hargreaves McIntyre**

**Strategy and insight consultancy**

**Culture, heritage, leisure and charities sector**

**18 years experience of the sector and cultural audiences**

**46 f/t staff; 3 offices – Manchester; London; Auckland**

**International client base**

**Including many major world class museums:**

**British Museum; Tate; Royal Academy; National Gallery;**

**Natural History Museum; Wellcome Collection;**

**Historic Royal Palaces; Art Institute Chicago; Philadelphia**

**Museum of Art; Te Papa; Historiska**



# Introducing the project

London – major centre for exhibitions

Yet little was actually known about the audience

All venues fishing in the same pond

Planning with little insight

Collective research project could benefit them all

Collaborative project involving 16 venues

# Introducing the project

We collected and analysed data on  
over 240 paid-for exhibitions at 22 London venues

From this we analysed:

- Exhibition types
- Audience sizes
- Marketing spend
- Lifecycle curves
- Return on marketing investment



# Methodology

- Desk research
- Population survey – 2600 – May 2012
- 6 Focus groups
- Online panel surveys

To give each venue an individual market report exploring profile, responses and behaviour at their venue and at paid-for exhibitions in general.

Plus a general report and public version

# Methodology

The data represents the audience for London temporary exhibitions in England only

Focus is on art and historical exhibitions

Overseas visitors are not represented

But the findings and implications affect all audiences whatever their origin

# Amazing Stats

## Amazing stats

**140**

Exhibitions in 3 year period

In an average year ...

**1.7m**

visits to paid-for exhibitions were made by 0.6m Londoners

**2.9m**

visits to paid-for exhibitions were made by 1.7m adults from elsewhere in England

**£38m**

was spent by paid-for exhibition visitors in venues

**£148m**

was spent by paid-for exhibition visitors in London and on travel





# Amazing stats

In one year.....

2.3m people make 4.6m visits

## Amazing stats

**135k** people have seen 6+  
exhibitions within past  
12 months (3%)

## Amazing stats

**1m** people would take a day off  
work to see an exhibition

## Amazing stats

**2.4m** people would plan a trip to  
London specifically to see an  
exhibition

## Amazing stats

**1m** people spontaneously turn up  
on the day



## Amazing stats

**264k** turn up on last weekend

# Motivations

# Deep appeal

Visitors are compared successful exhibitions with multi-dimensional theatrical experiences – but better:

They provide new ways of seeing the world

Deliver profound personal benefits

Intense social, intellectual, emotional and spiritual outcomes

Puts the visitor in charge of their own experience

Deeply fulfilling

‘I walked out and spent the whole of the rest of day feeling really different about things. I can’t really explain what it was – I think it was a bit of perspective’

‘We only eat out now if it’s a special occasion. But we have to go to an exhibition or gallery every week. We prefer to feed our minds.....’

|'We usually try to compare: what would you pay? Well if you went to the theatre, what you would pay for the theatre seat for two hours? You have two hours of an exhibition, it usually costs less.'

|'Hajj at the British Museum we talked about that for about two days ... also the ideas behind it, and the interpretation of the exhibition. That was very important.'



# Motivations: Social

*'I find going to an exhibition, I suppose more sociable than going to the theatre or to a concert. When you're sat in a theatre or a concert, you watch the performance and then you talk about it. Whereas at an exhibition, if something pops into your mind, you can talk about it then'*

*'I think it's a good way to spend time with friends as well'*

*'Seeing people interact with art is a ball!'*

# Motivations: Intellectual

*'I prefer historical things ... so if I learn a lot more, wanting to know a lot more afterwards'*

*'I think it expanded my knowledge'*

*'Finding out things that I never knew before because it leads you to do other things'*

# Motivations: Emotional

*‘If a good exhibition has an emotional pull .. I think some exhibitions are like that, where there’s a history that comes out of the objects, and kind of grabs you ’*

*‘There was nobody else around, we could just sit, or stand with it (the art work) and she was ... actually blown away, and to have that intimacy with the art, and that relationship with the art it is an innate part of the experience isn’t it?’*

# Motivations: Spiritual

*‘I find living and working in London kind of drains my soul, and I think when you go to something and it lifts you ... it gives you a bit of hope ... it gives you bit of your soul back’*

*‘It is almost like this transcendental experience, you are just tripping out’*

*‘After seeing someone like Hockney which is an artist I’ve never really known much about before, I felt quite inspired after that. You just feel a little bit more alive afterwards’*

# Market trends and motivations

## Societal trends

Bite-size activity close to home

Right price

Experiences as a form of social status

Appeal of expert voices in a social media world

Meaningful leisure activity

Coherent experience

Authentiseeking / Connoisseurship

Self-actualisation

## Personal motivations

Doing London with visiting friends / relatives

Hanging out with friends

Everyone's talking about it - need to see

Quality time with like-minded companions

Self-improvement / prof. development

Once in a lifetime opportunity to see

Feast for the eyes

Food for the soul

## Outcomes

Entertainment, amusement, fascination

Self-esteem; achievement

Escapism; bonding

Perspective / fulfilment

Altered state

**The Market is huge**

**2.5m**

people in the North West have never attended a temporary exhibition in London, but are interested in doing so (potential attenders). This is the largest potential market in England.

**1.6m**

potential attenders live in the South West.

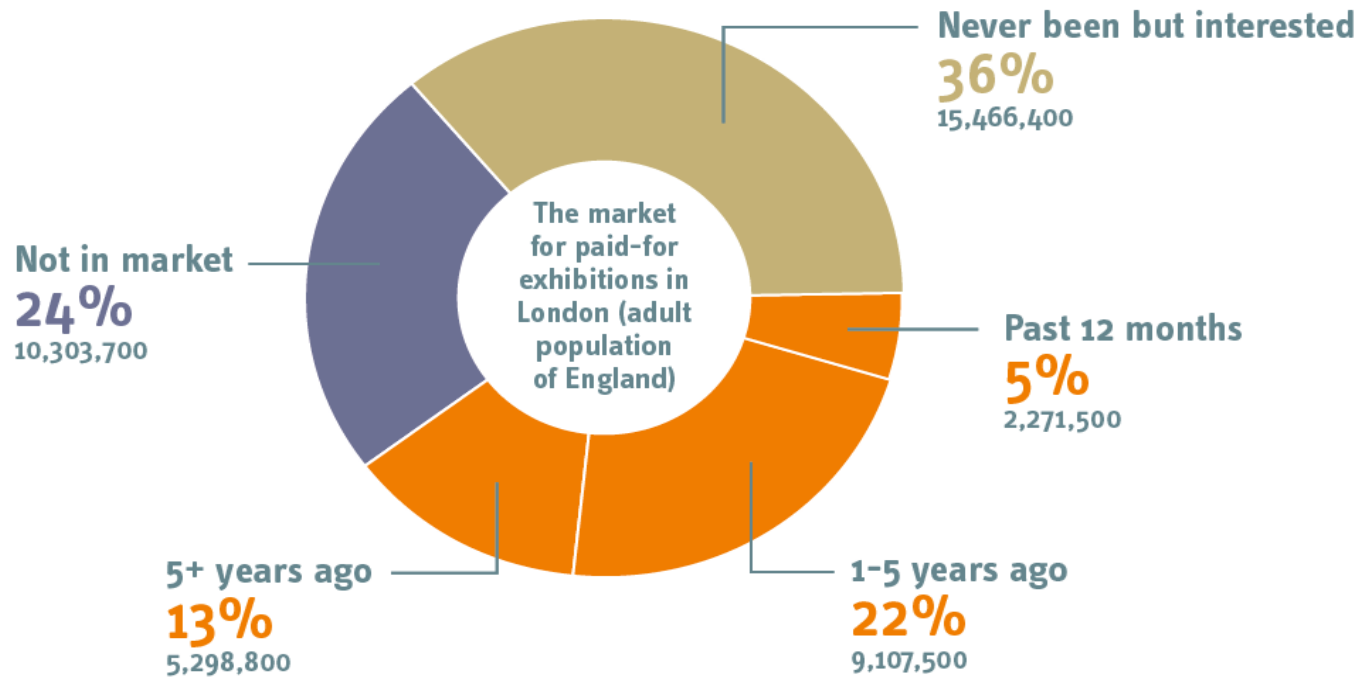
**1.7m**

London residents have not attended a paid-for exhibition but would be interested in doing so: a significant potential market on the doorstep.





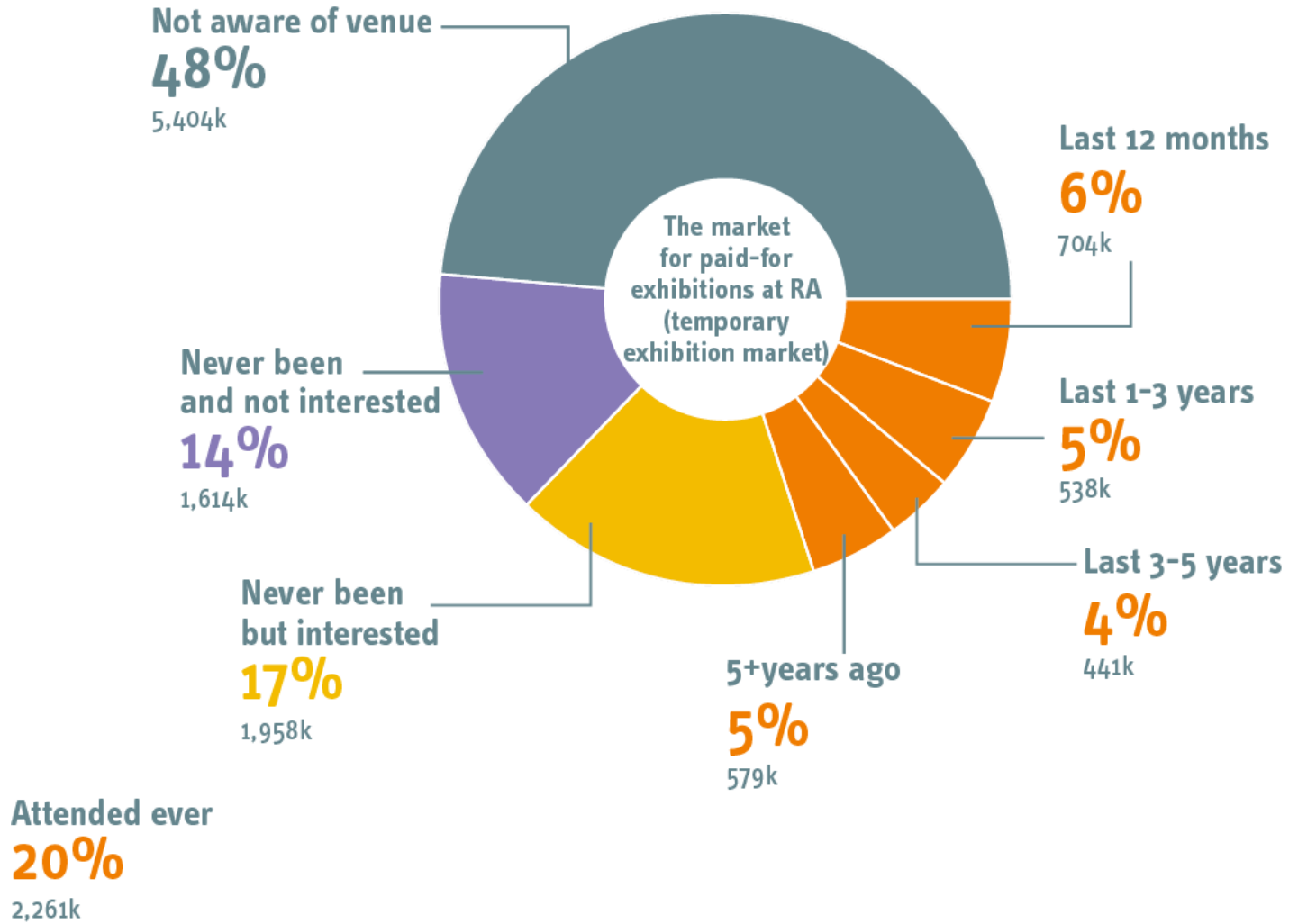
# Market size – London paid for exhibitions



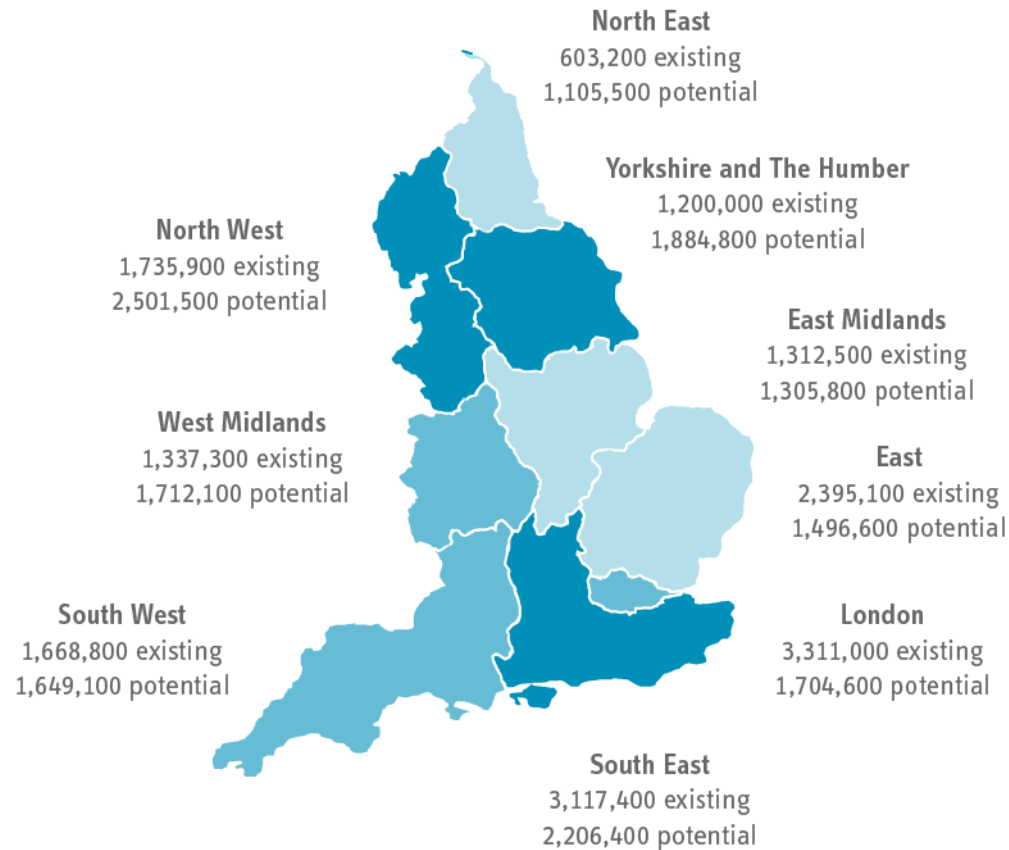
Attended ever  
**40%**  
16,697,600



# Market size – Venue A



# Market size - regions



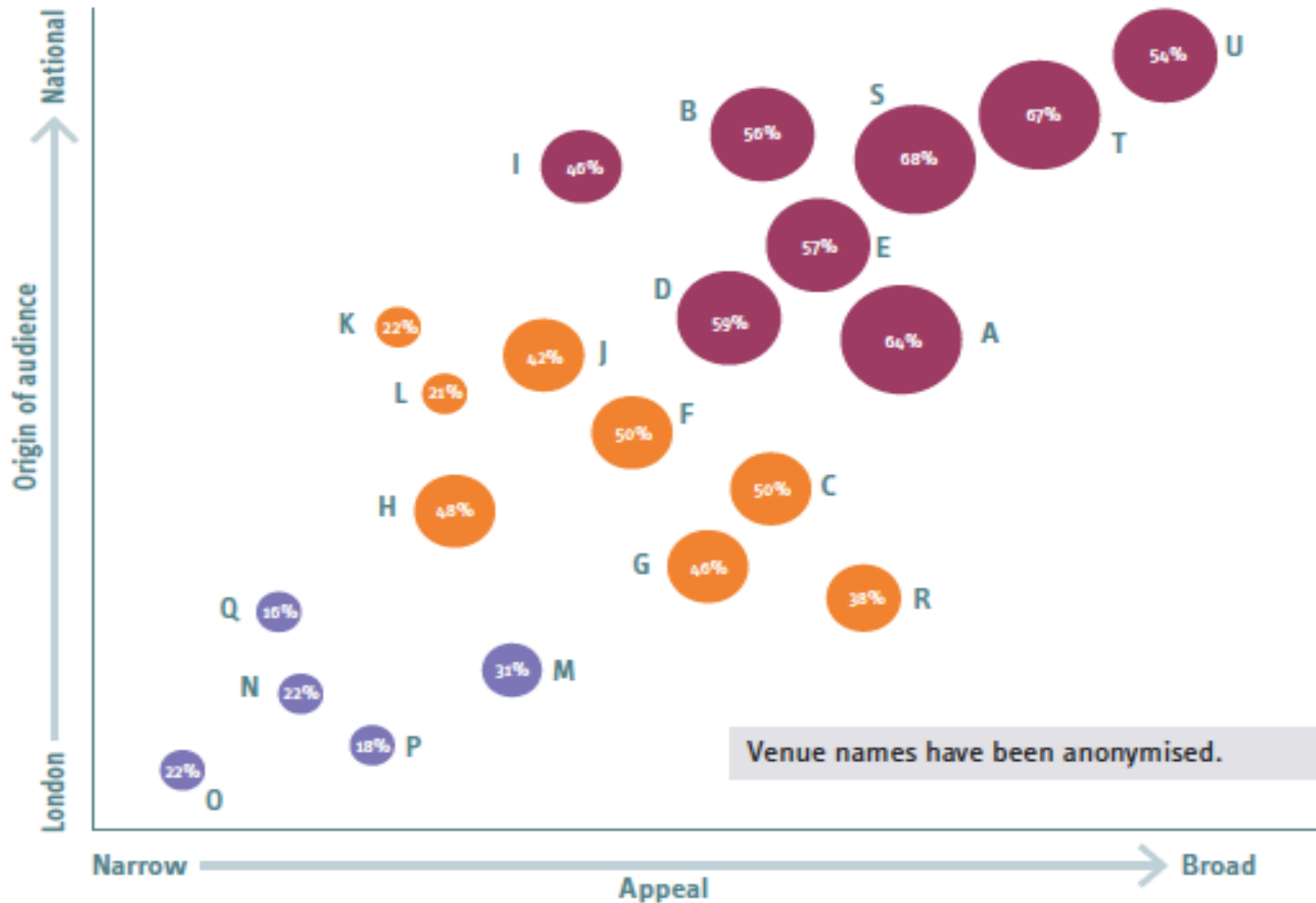
11% of the potential market lives in London

89% of the potential market lives elsewhere in England

16% of the potential market lives in the North West

# Brand strength determines market size

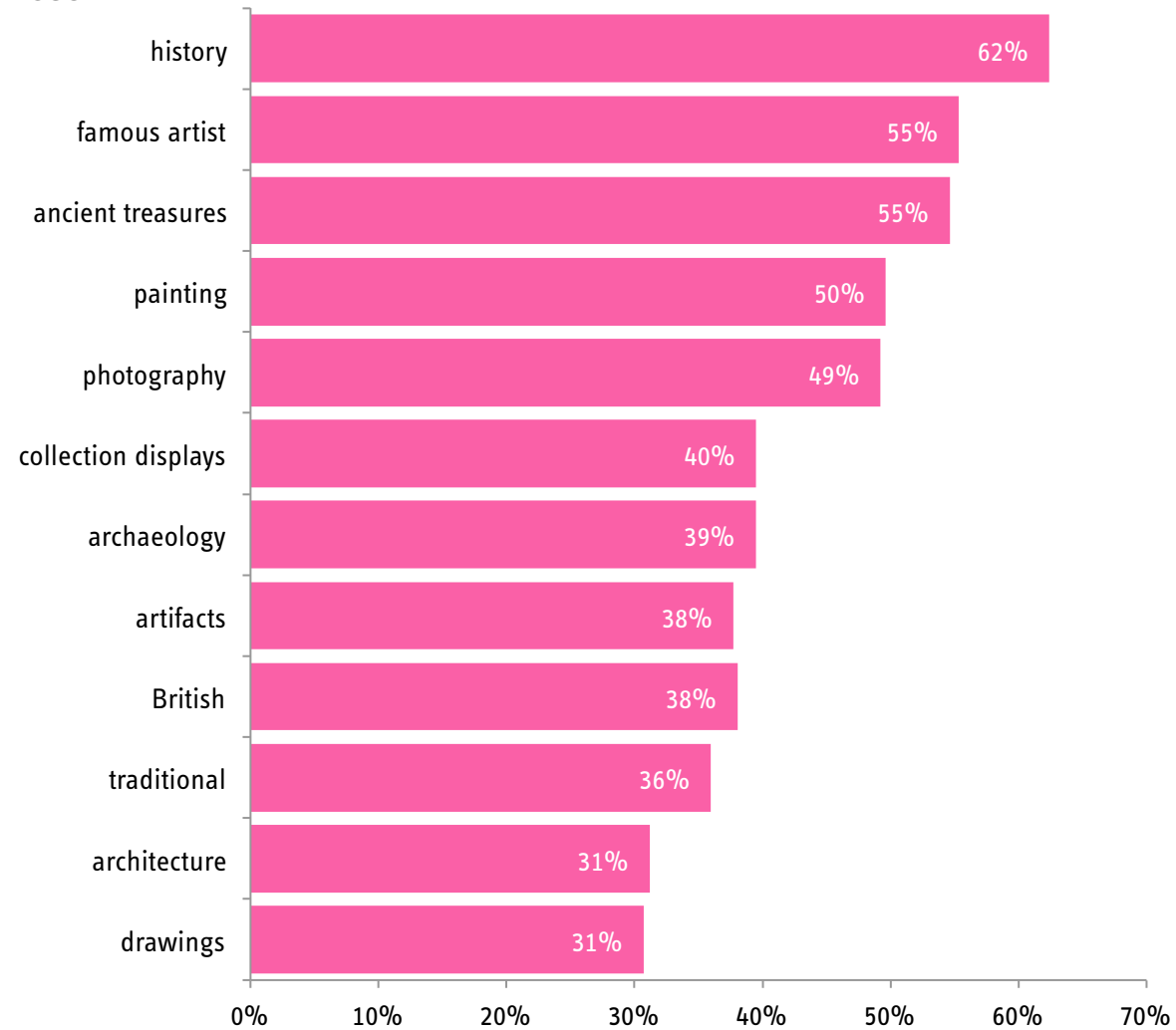
Market penetration of exhibition venues (% of current market ever attended each venue)



**Who attends?**

# Interest in the programme

## *Potential audiences*



# Culture Segments



## Enrichment

mature  
traditional  
heritage  
nostalgia



## Entertainment

consumers  
populist  
leisure  
mainstream



## Expression

receptive  
confident  
community  
expressive



## Perspective

settled  
self-sufficient  
focused  
contented



## Stimulation

active  
experimental  
discovery  
contemporary



## Affirmation

self-identity  
aspirational  
quality time  
improvement



## Release

busy  
ambitious  
prioritising  
wistful



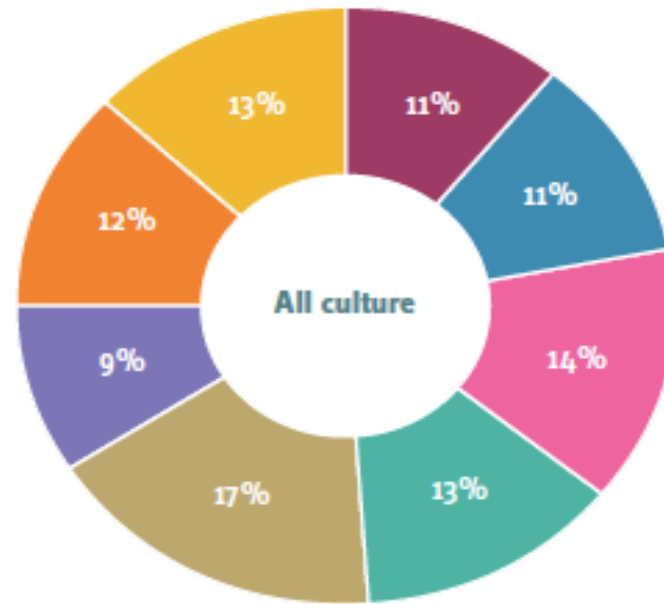
## Essence

discerning  
spontaneous  
independent  
sophisticated

**Current market by Culture Segment**



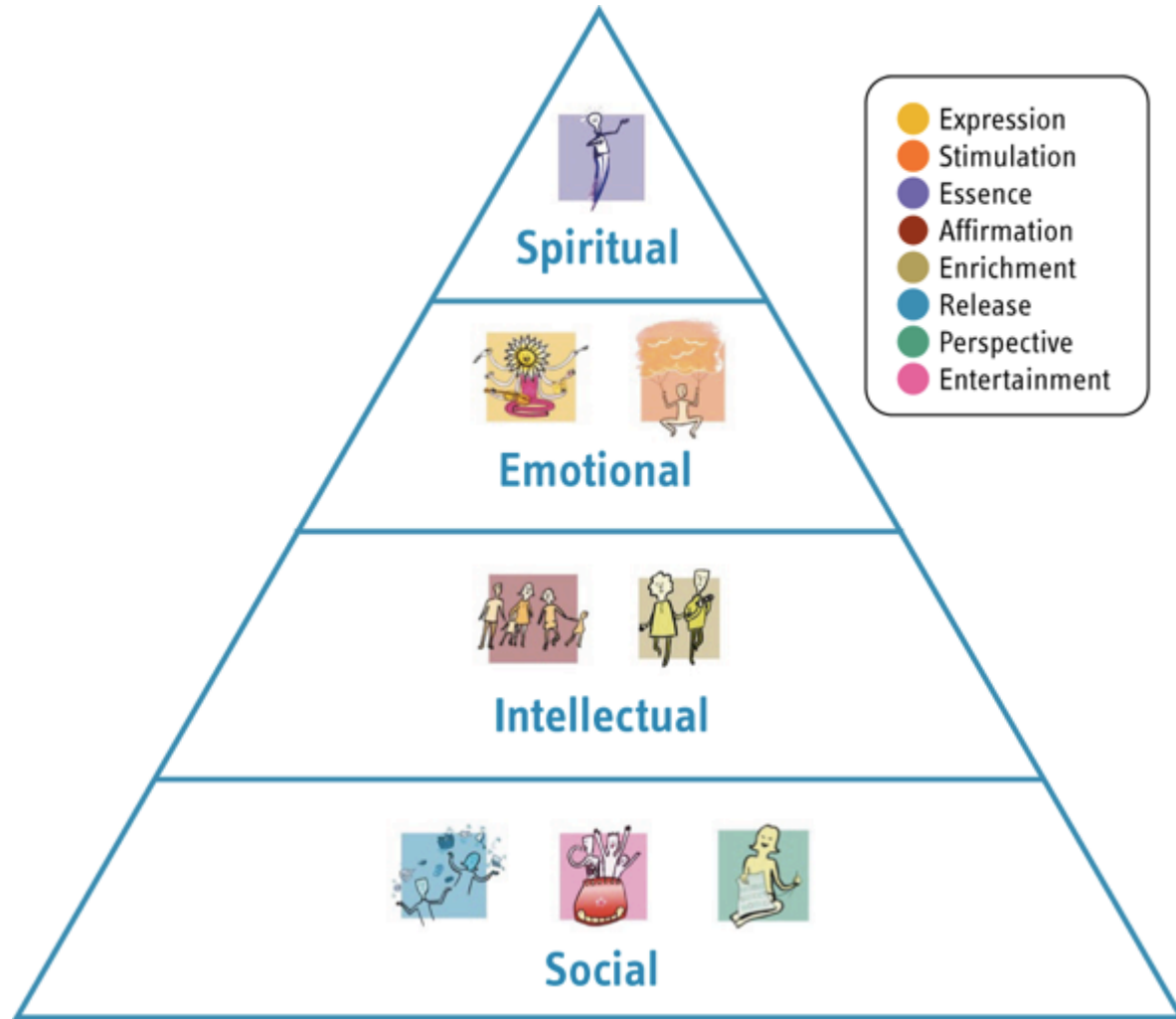
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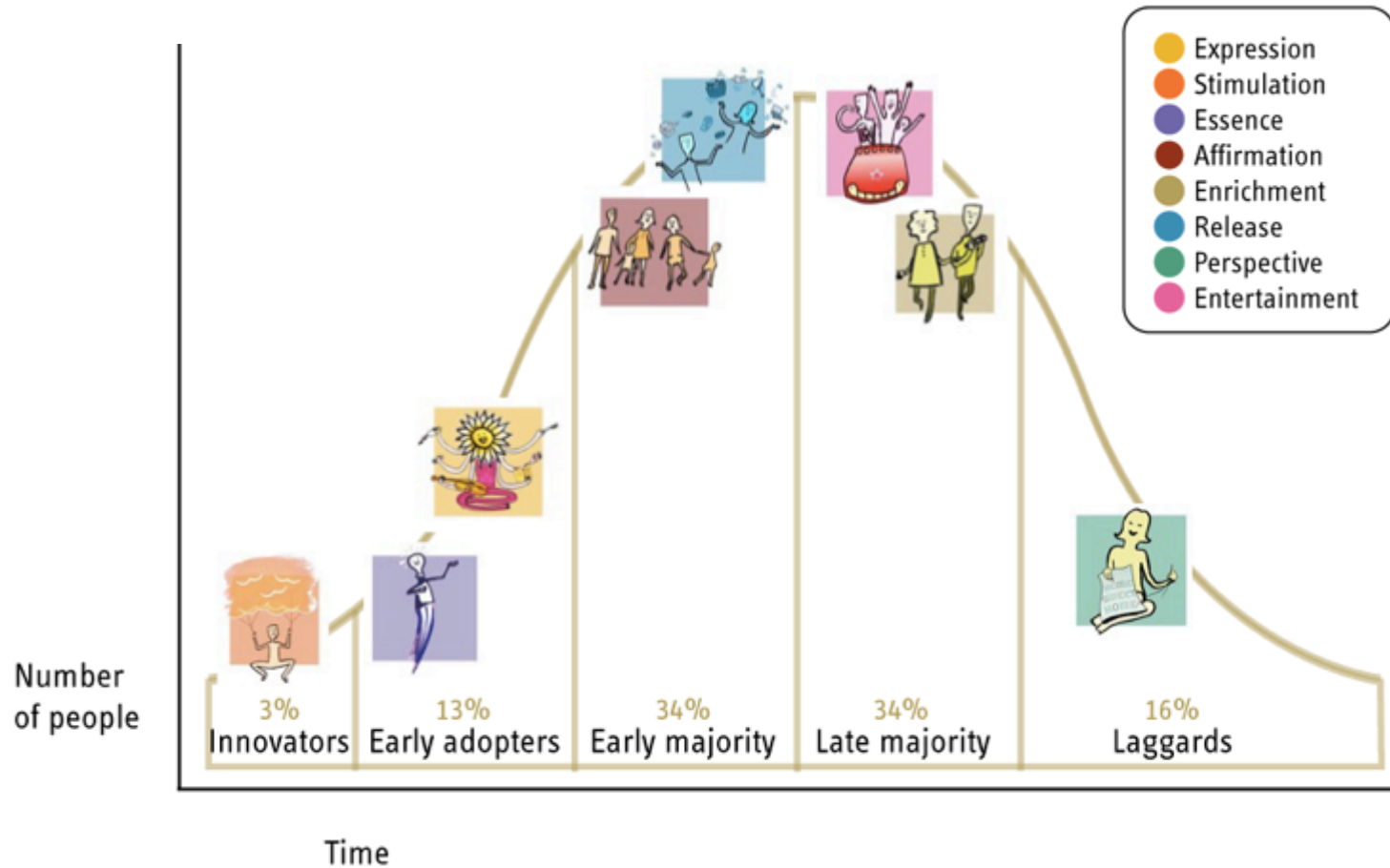


# Motivations

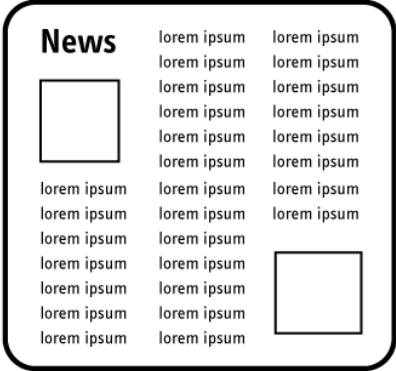




# Risk



# Decision to visit



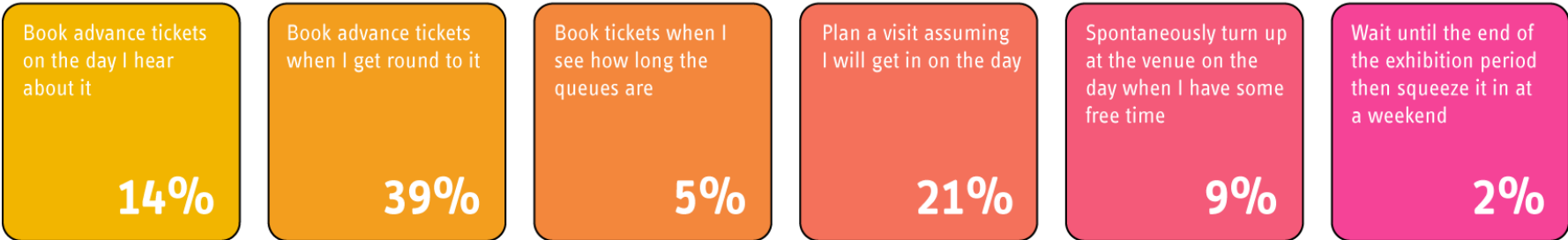
I book or decide to visit purely based on my own judgement **56%**

I wait for reviews to come out **22%**

I wait for a friend to recommend or suggest it **12%**

# Decision to book or visit

When I find out about a paid for exhibition I want to go to, I usually tend to ...



# Building widest appeal

Visitor cohorts: size (% of current market), attitude to risk, Culture Segments



## Visitor clusters: *Creatives*

47% **creative/** cultural industries; 19% work in **museums**

**Young** - 51% - 16 -34; 27% Londoners

Exhibitions main cultural activity for 57%

Closely follow **favourite venues**; 1 in 7 are **members/ friends**

**Engage deeply**; part of cultural **conversation**

**Ear to the ground** – on lists; use social media; on site

Early and **savvy** bookers

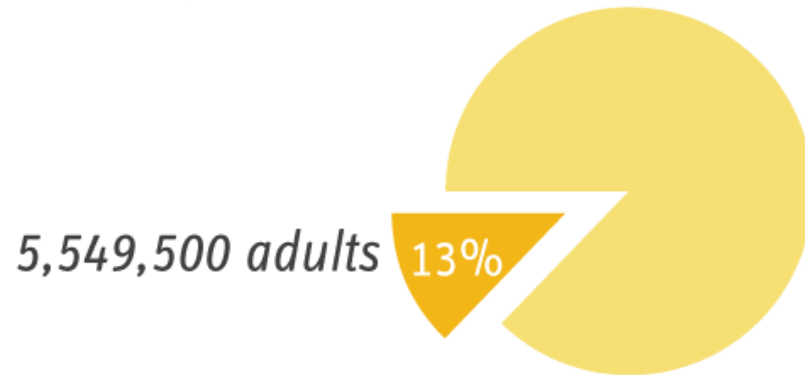
44% would visit during **Lates**

**Willing to pay** premium for added value

**High spenders** - £17.43 for blockbuster;

Spend £18.93 in venue; £83.52 elsewhere

# Expression



Attitudes and life priorities

**LIVING LIFE TO THE FULL  
COMMUNITY AND FAMILY  
ARTS AND CULTURE  
FAITH AND SPIRITUALITY  
NATURE**

## Visitor clusters : *Risk takers*

**Discerning**, culturally active, highly qualified but not experts

Londoners

**Voracious** and omnivorous museum/ gallery attenders – 7+ visits a year; interested in massive range of topics – contemporary – archaeology. Value them higher than gigs or meals

Want to improve their **knowledge** but also seek deeper benefits – 39% reflection; 30% **food for the soul**

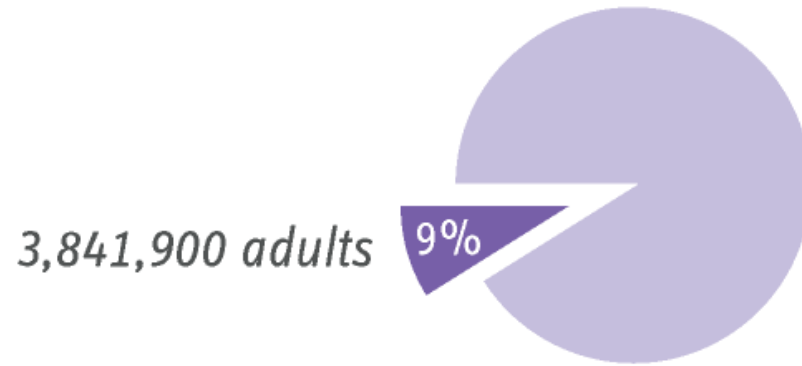
**Hunt** for exhibitions to attend – 51% look on venue websites; 35% underground

Use **own judgement** - 69% but **slower to act** -44% when they get around to it

**Crowd sensitive** – 45% want less busy opportunities

**Price resistant** - £15.20 blockbuster ; £14.73 per head on -site

# Essence

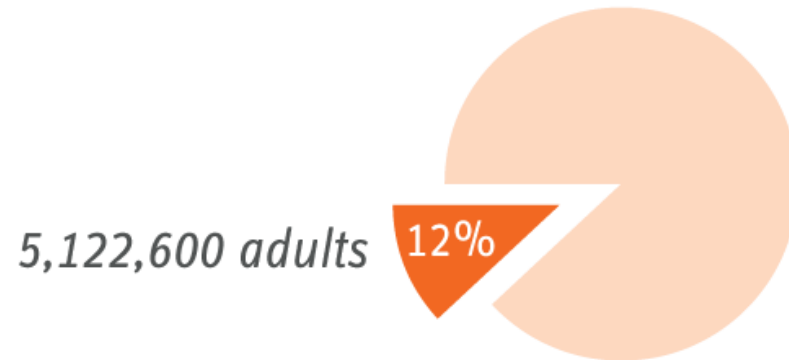


Attitudes and life priorities

**EXPLORING  
ART & CULTURE  
SELF DEVELOPMENT  
LIFELONG LEARNERS  
EXPERIENCE OVER MATERIAL GOODS  
ADVENTURES**



# Stimulation



Attitudes and life priorities

**ENJOYING LIFE**  
**GOING OUT**  
**TAKING RISKS**  
**LIVE MUSIC**  
**FOOD AND DRINK**  
**CONTEMPORARY EVENTS**

# Visitor Clusters: *Cautious Gamblers*

Mainly Enrichment

Fit exhibitions into **busy life**; live **outside London**

Low frequency; **apologetic**

Emotional, sensory benefits as well **as social (45%)**

**High users of café**, restaurant and shop but **low spenders**

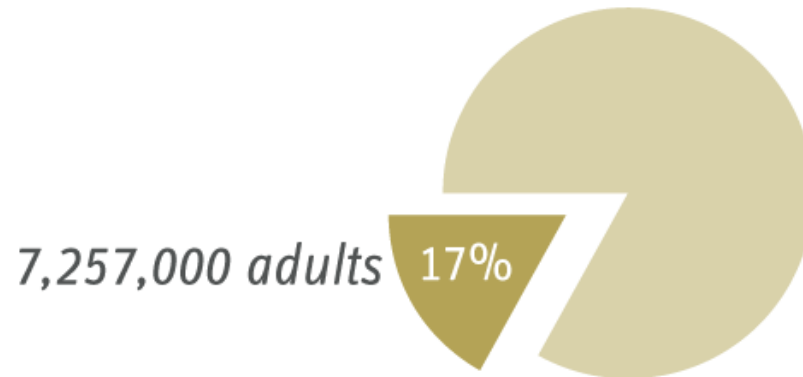
£14.81 in venue; £50 on the day

**50% influenced by WOM**; 41% TV programmes

Mainstream tastes; history, archaeology - **53% ancient treasures**

**Not wily bookers** – unaware of need to pre-book

# Enrichment



Attitudes and life priorities

- NATURE, GARDENING, COUNTRYSIDE
- TRADITIONAL ARTFORMS
- HOME LIFE
- THE PAST
- FAITH
- ARTS AND CRAFTS

# Visitor Clusters: *Safety Firsts*

Mainly Perspective

Older – 27% over 65

Live outside London; fulfilled lives; inner directed but risk averse

Low frequency; make stand alone trips

Generic tastes; 68% history, 53% ancient treasures

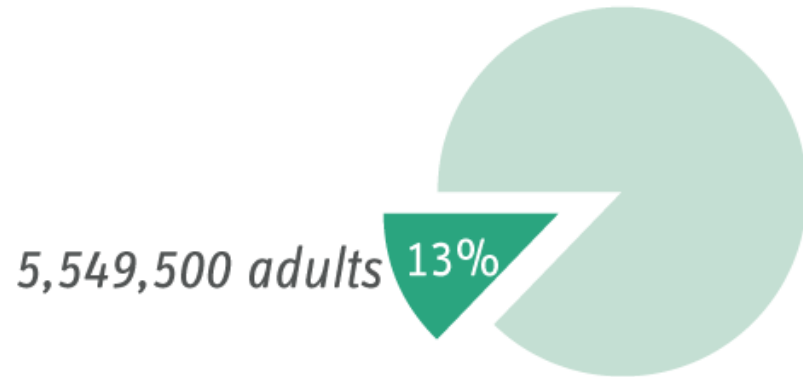
Stick to well known venues

Influenced by above the line channels – newspapers; TV; underground

High users of café, restaurant and shop

Not wily bookers – tend to just pitch up

# Perspective



Attitudes and life priorities

**OPTIMISTIC  
THEIR OWN NEEDS ARE IMPORTANT  
INNER DIRECTED  
READING  
LEARNING  
THE OUTDOORS**

## Visitor Clusters: *Conservatives*

Mainly Affirmation, Release , Entertainment

**Lower priority**, background activity fitted into **busy lives**

Low frequency; looking for **entertainment**

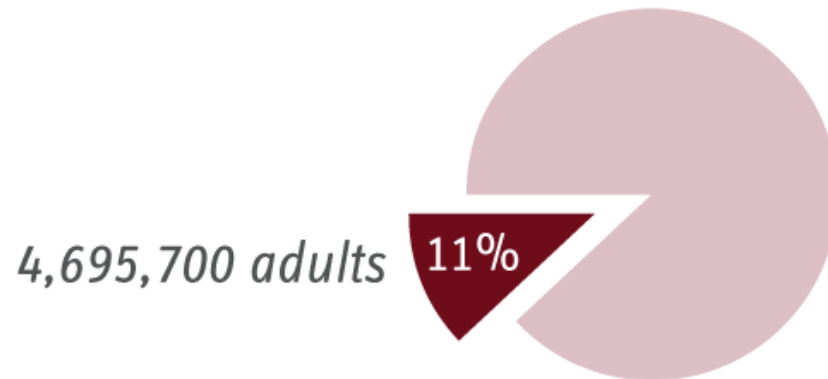
**Passive** – wait for friends to tell/ invite them

Stick to **high profile** shows at well known venues

Influenced by **above the line** channels – newspapers; TV;  
underground

**High spenders** – users of café, restaurant and shop  
£17.30 for blockbuster ticket

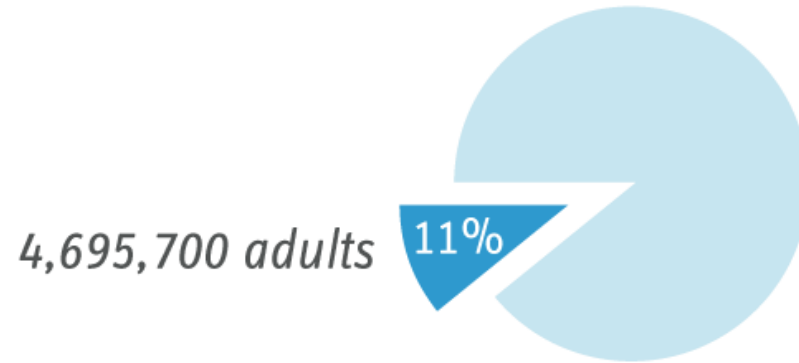
# Affirmation



Attitudes and life priorities

**FAMILY NEEDS**  
**PERSONAL DEVELOPMENT**  
**QUALITY TIME WITH OTHERS**  
**WHOLESOME LEISURE ACTIVITIES**  
**ENJOYABLE EXPERIENCES**

# Release

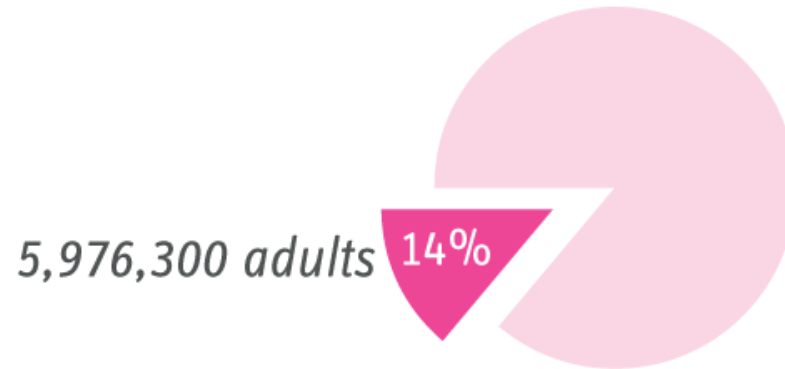


Attitudes and life priorities

**WORK & FAMILY  
SOCIALISING OUTSIDE THE HOME  
RELAXATION  
ENTERTAINMENT  
PRIORITIES ARE CLOSE TO HOME**



# Entertainment



Attitudes and life priorities

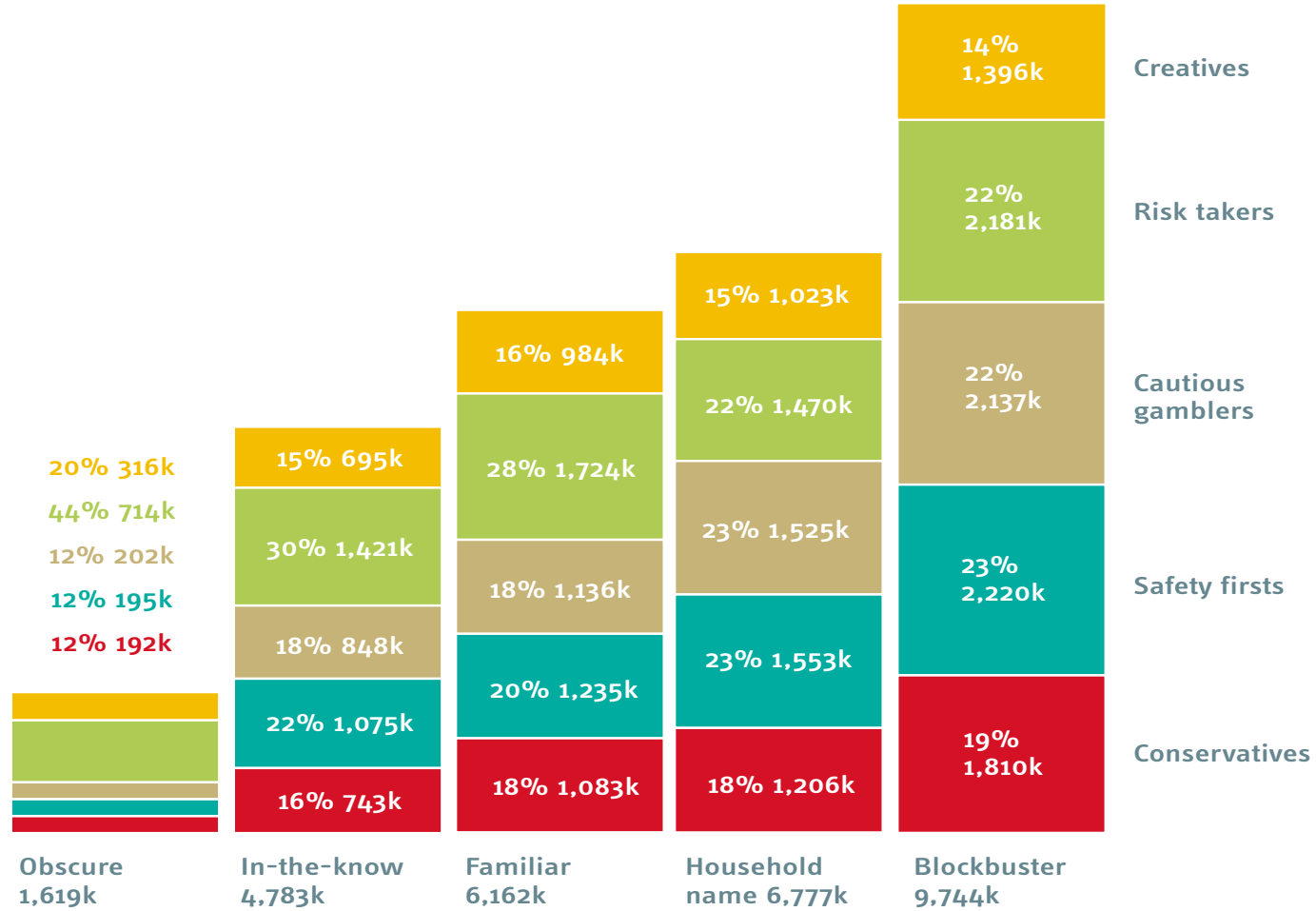
**HOME AND PUB  
TV, CELEBRITY, SPORTS  
THRILL  
ESCAPISM  
PRIORITIES ARE VERY CLOSE TO HOME**

# Five levels of exhibition

## Levels of exhibition appeal summary

	Typically attract	Total potential market	For example
<b>Specialist</b> Little-known artists / specialist themes	50k – 95k	1.62m	Wim Crowel: A Design Odyssey (Design Museum) Ron Arad: Restless (Barbican)
<b>In-the-know</b> Slightly higher-profile artists, more accessible themes	75k – 170k	4.78m	Grayson Perry: Tomb of the Unknown Craftsman (British Museum) Chris Ofili (Tate Britain)
<b>Familiar</b> Widely-known artists or accessible, historic themes	95k – 255k	6.16m	Magnificence of the Tsars (V&A) Afghanistan: Crossroads of the Ancient World (British Museum)
<b>Household</b> Well-known personalities and subjects	140k – 285k	6.77m	Annie Leibovitz (National Portrait Gallery) Henry Moore (Tate Britain)
<b>Blockbuster</b> General popular appeal	220k – 900k	9.74m	David Hockney (Royal Academy) Leonardo da Vinci: Painter at the Court of Milan (National Gallery)

Potential market for exhibition levels by visitor cohort



# Willingness to pay



**1.25m**

would consider taking out membership to ensure they got tickets to a blockbuster

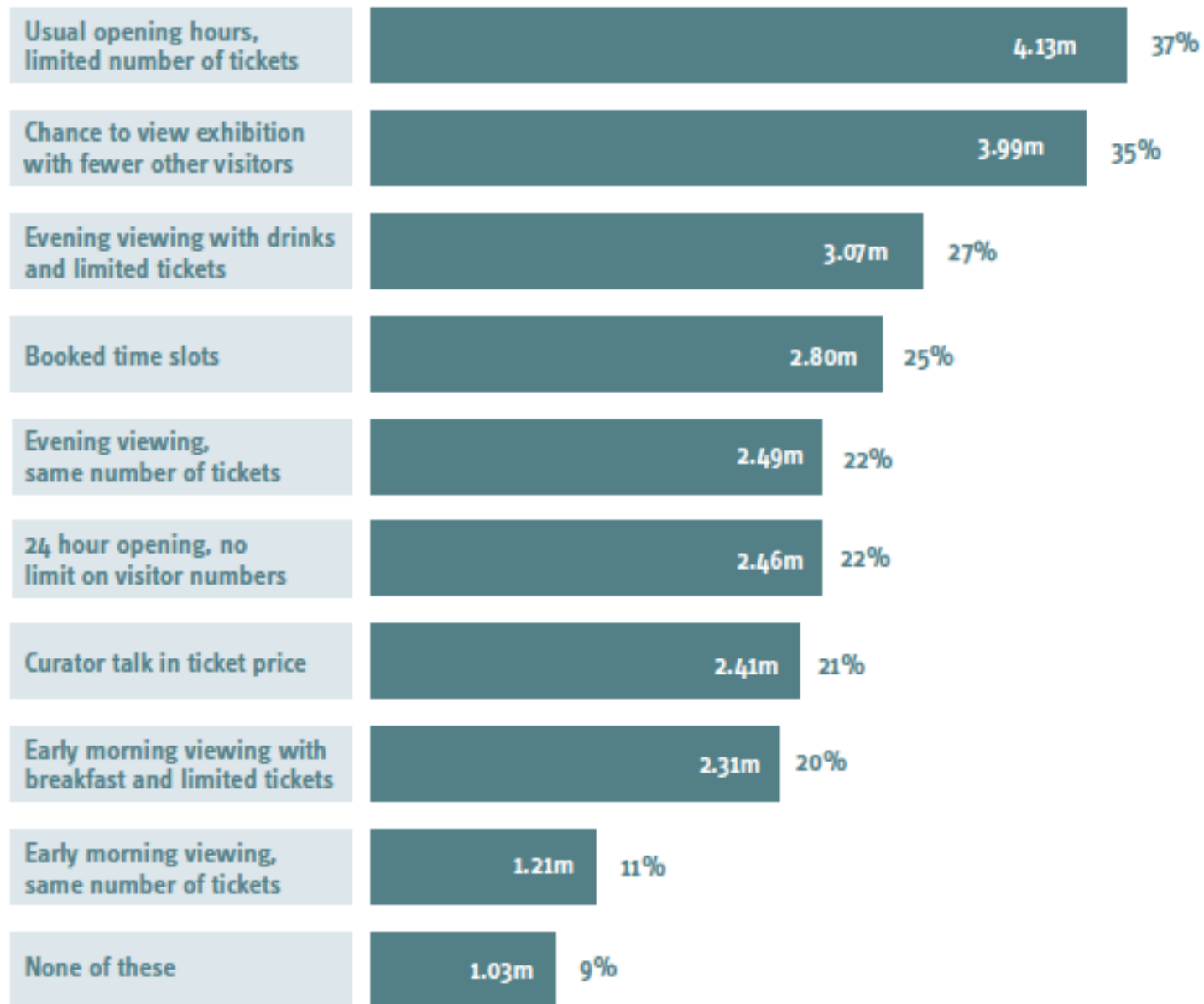
**3.33m**

would take advantage of late opening to allow them to see a sold-out exhibition

**1.79m**

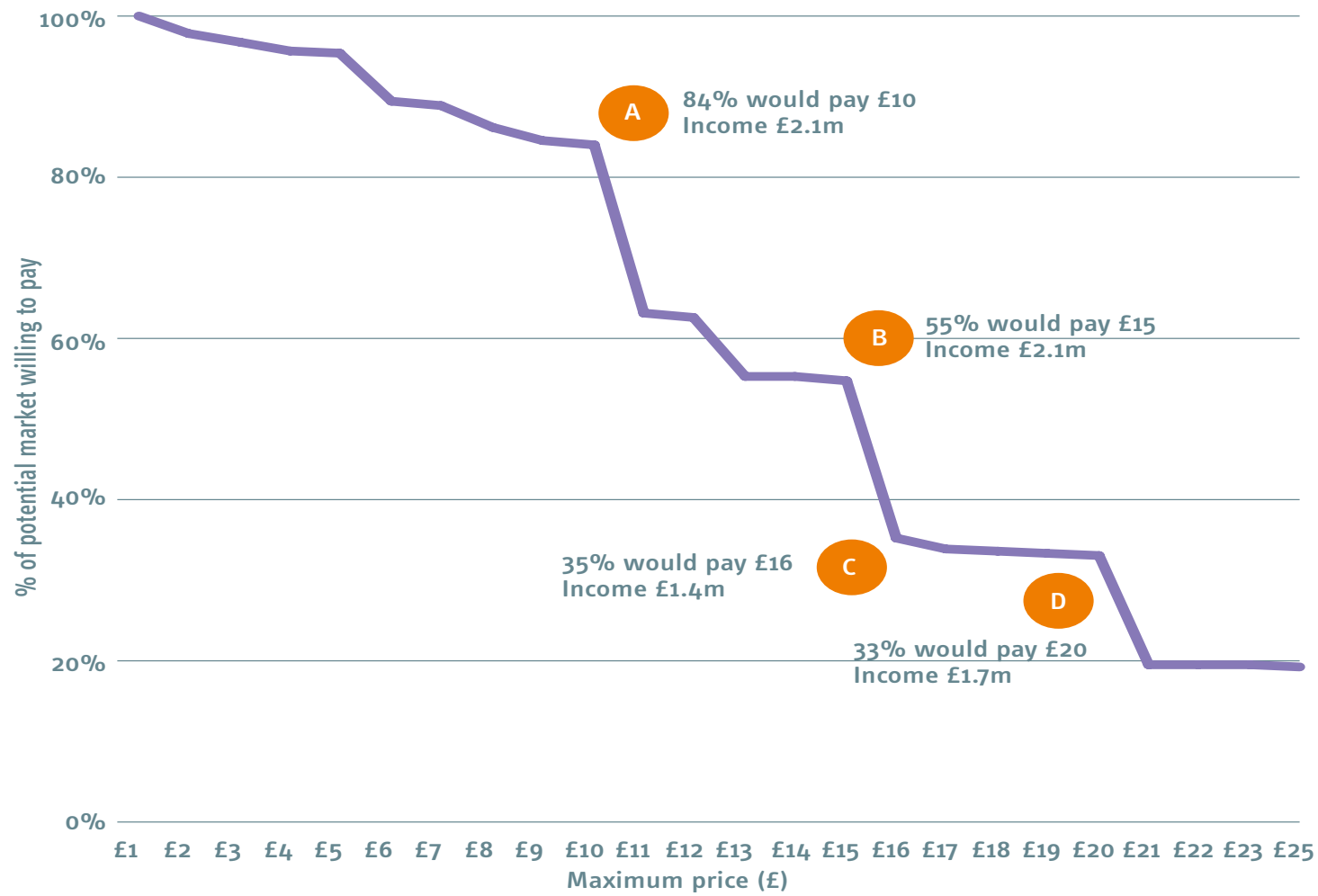
would join the queue early in the morning to try to get tickets to a sold-out show

### Added value: exhibition extras (% current market willing to pay)



[Base 2600]

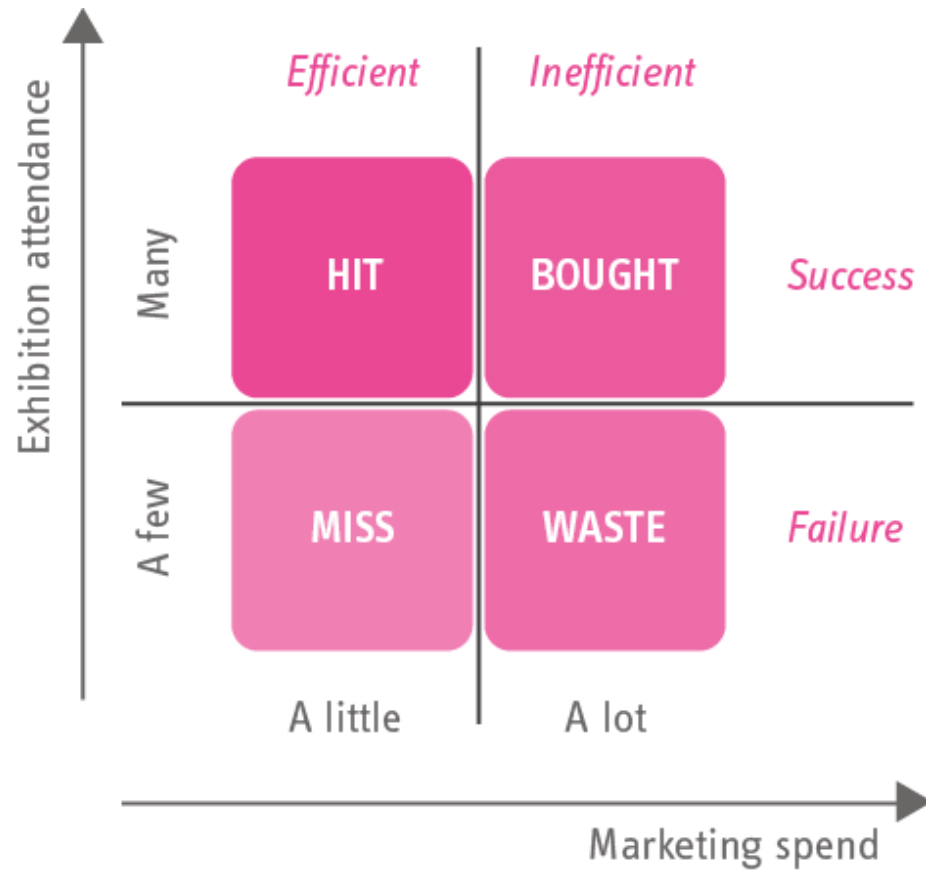
### Maximum price potential visitors would pay for a Blockbuster exhibition



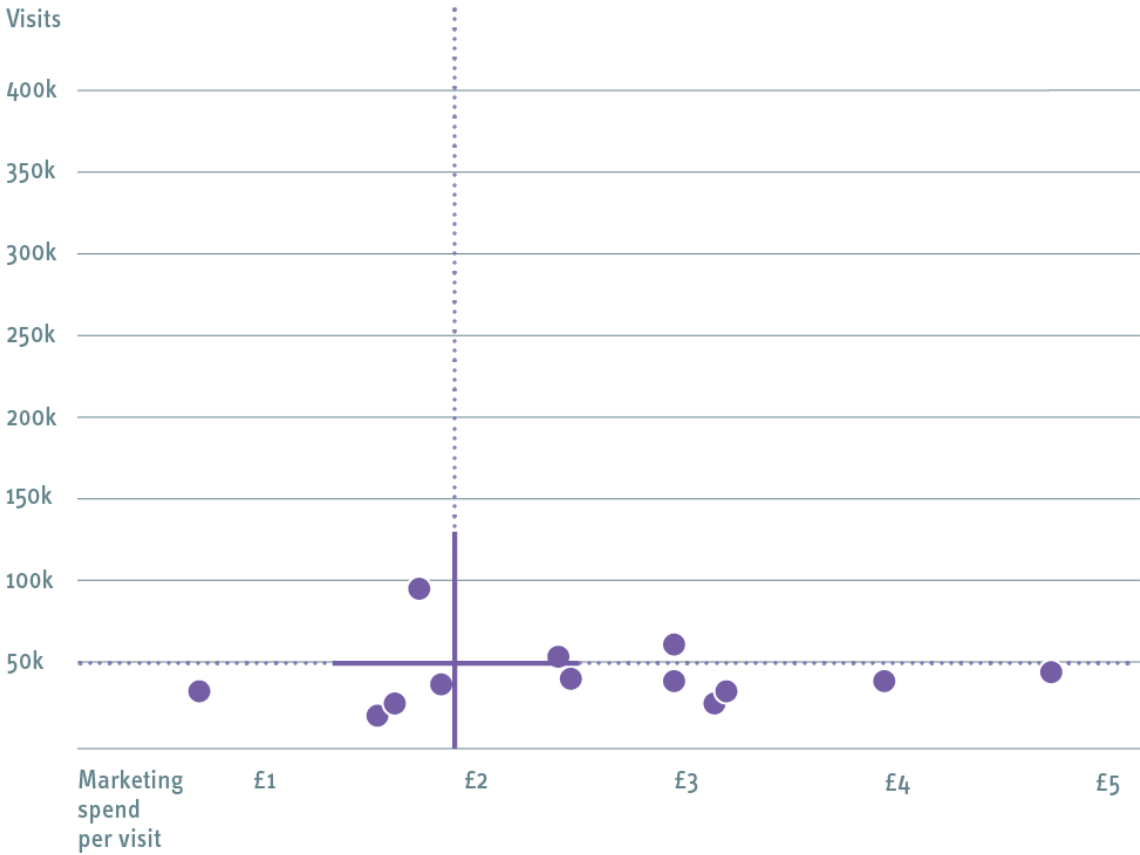


# Marketing Spend

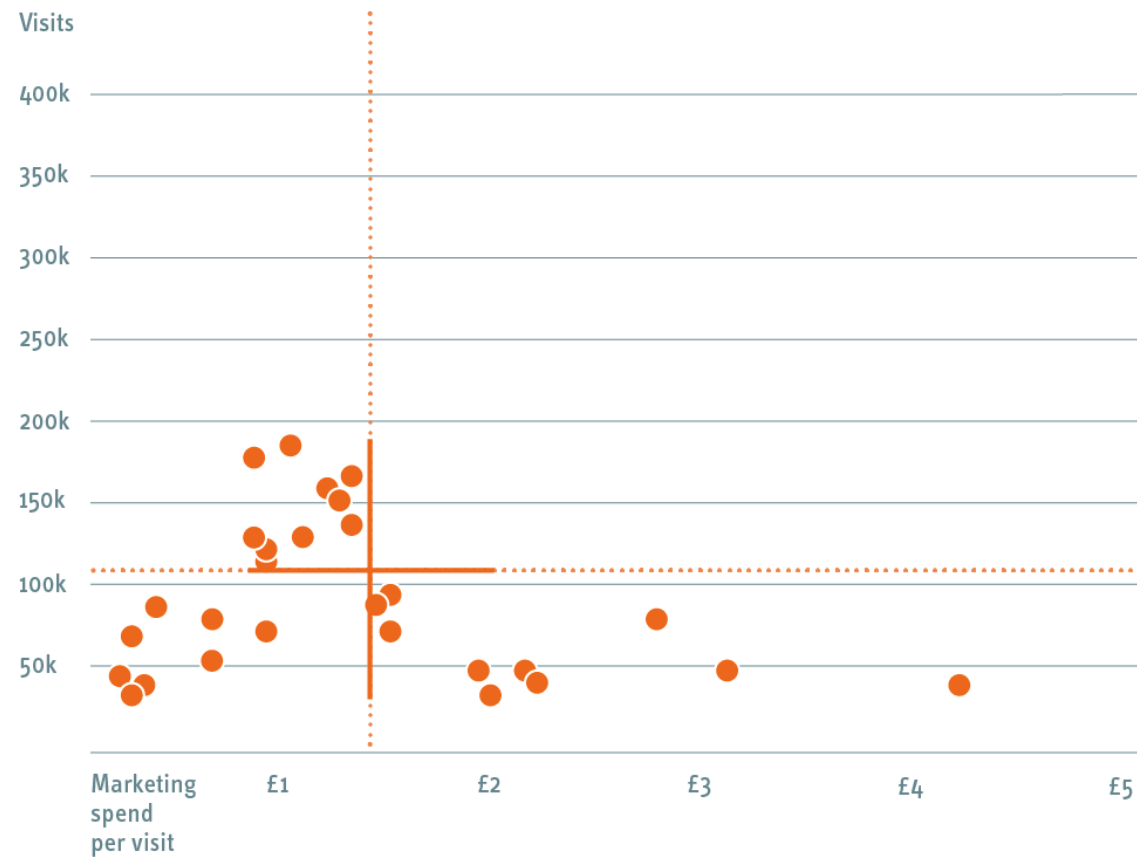
# Marketing spend



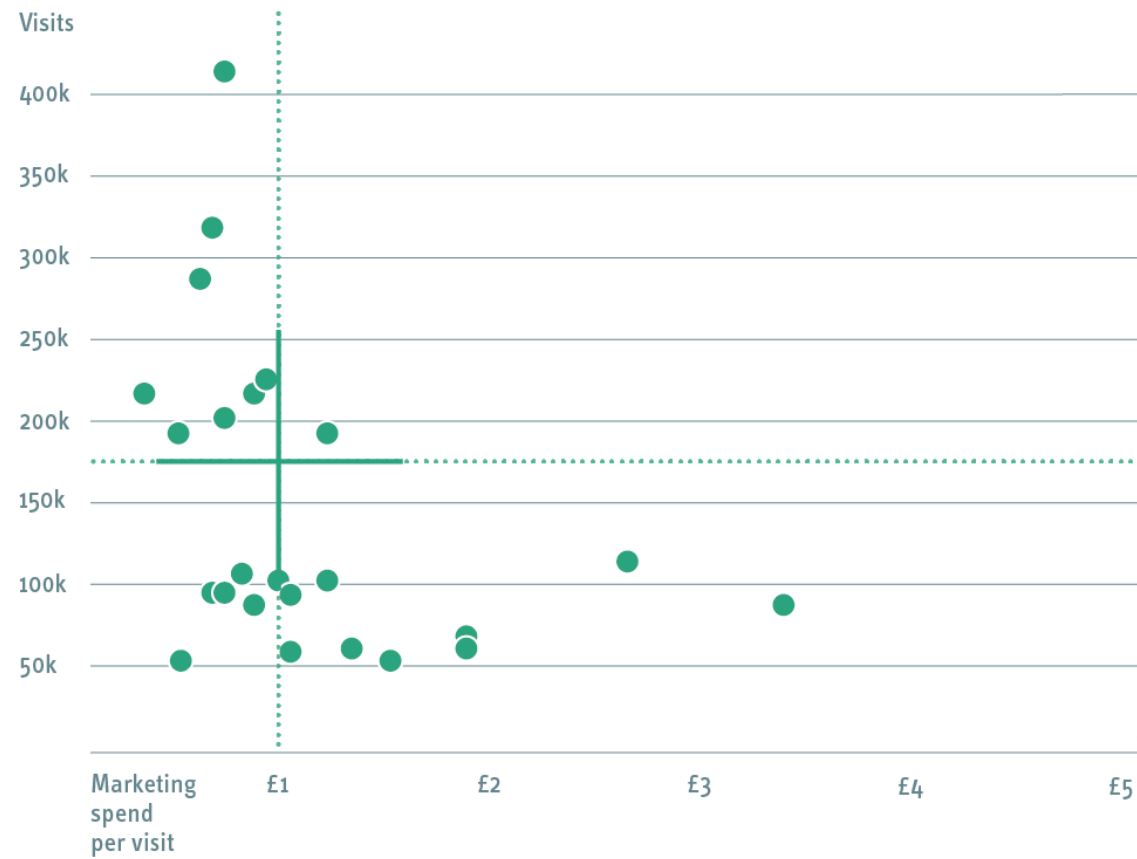
# Niche band



# Culture Band

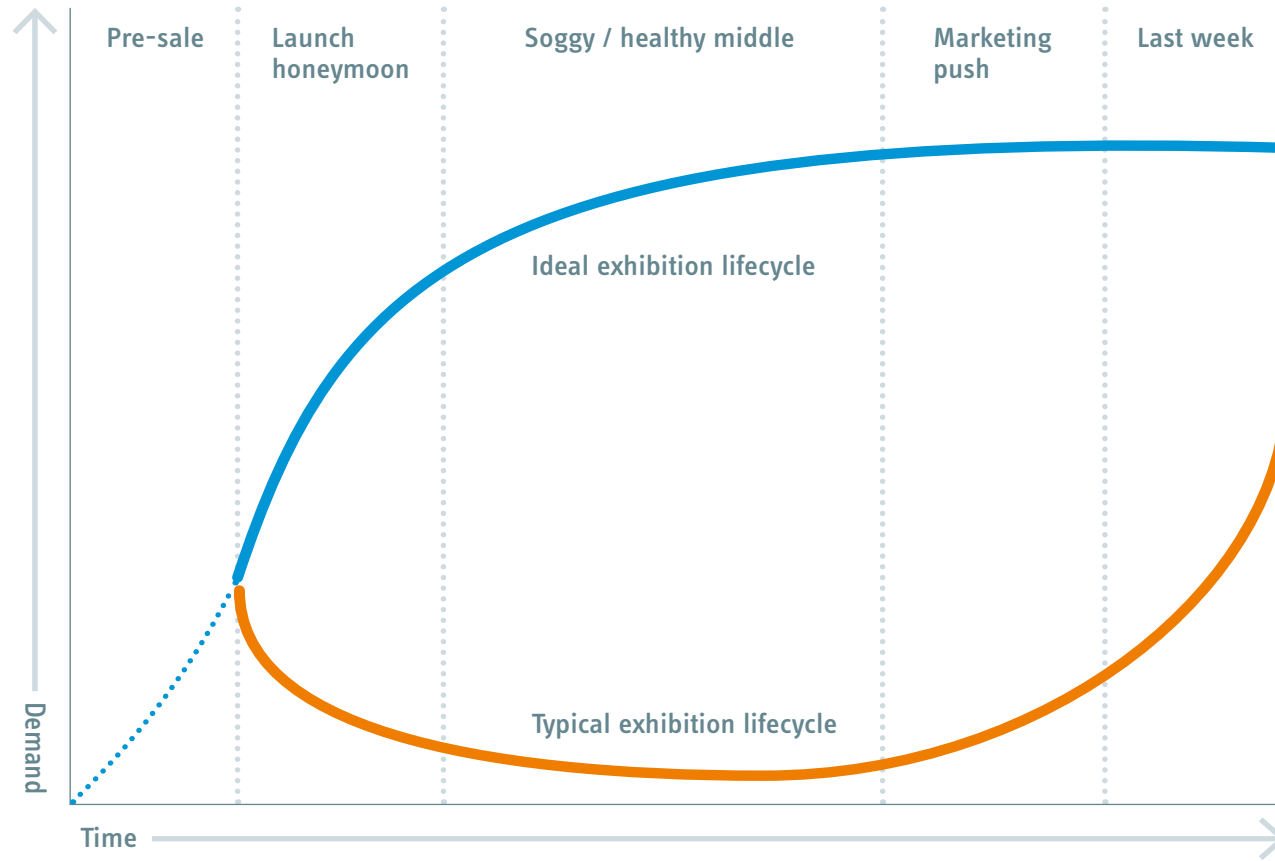


# Mainstream Band

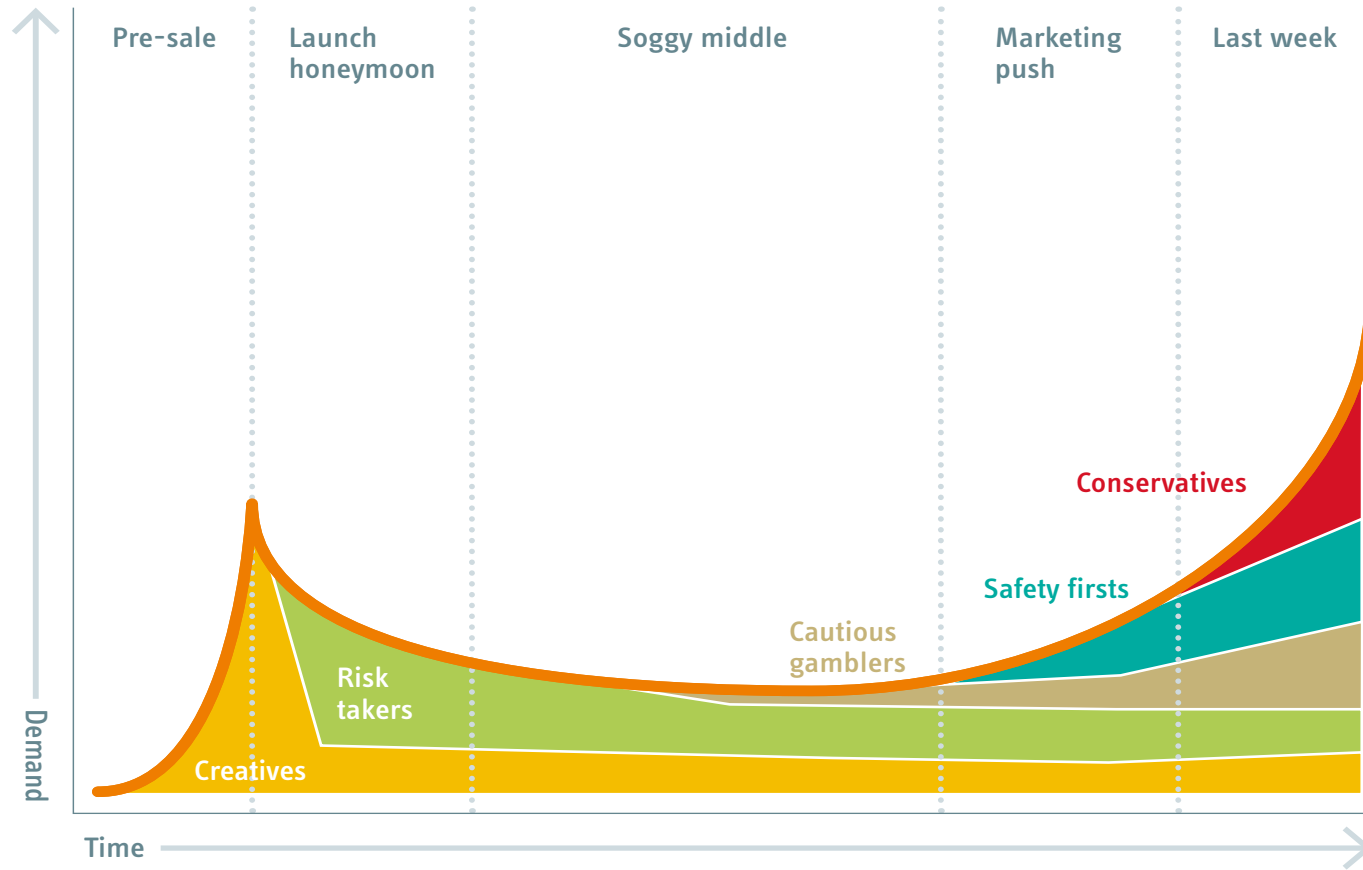


# Managing the Lifecycle

### Exhibition lifecycle from pre-sale to closure

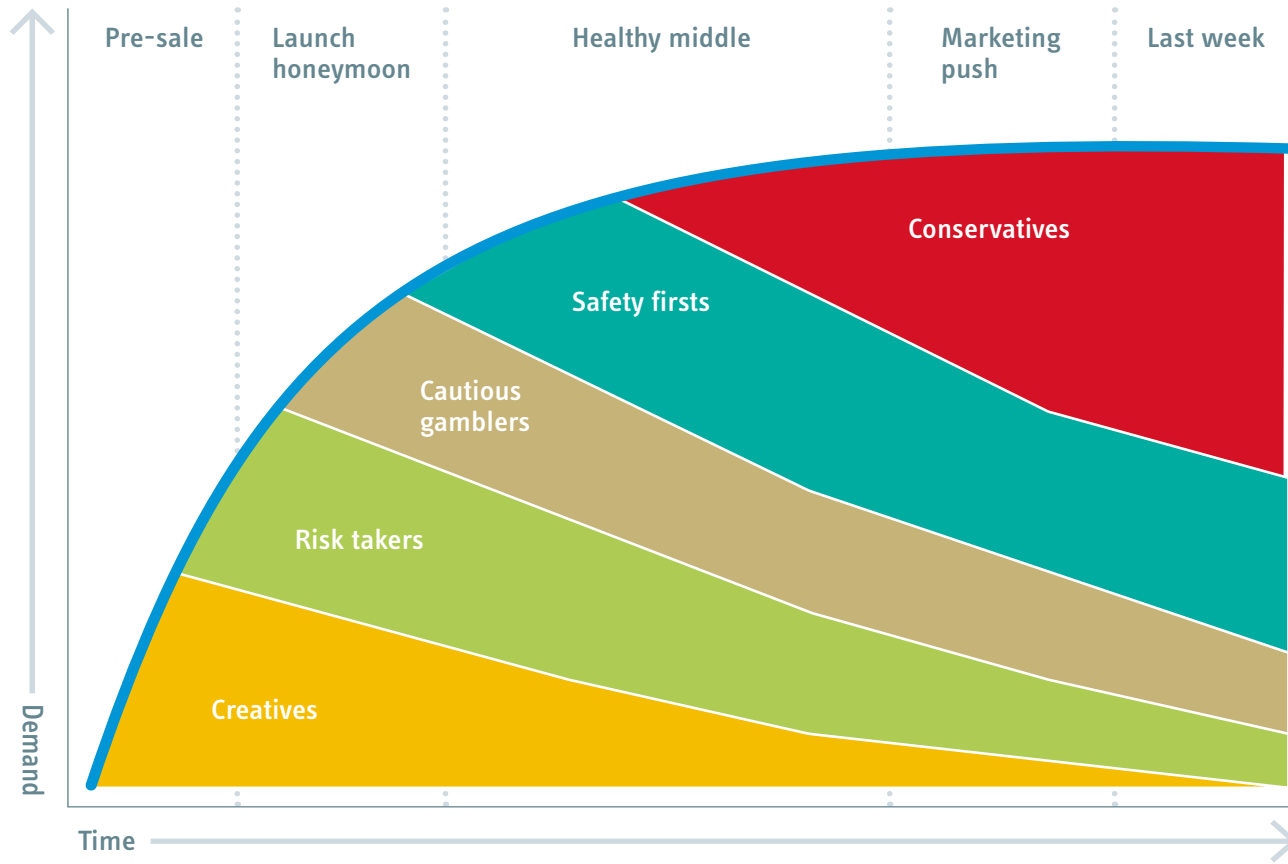


### How visitor cohorts drive typical exhibition lifecycle

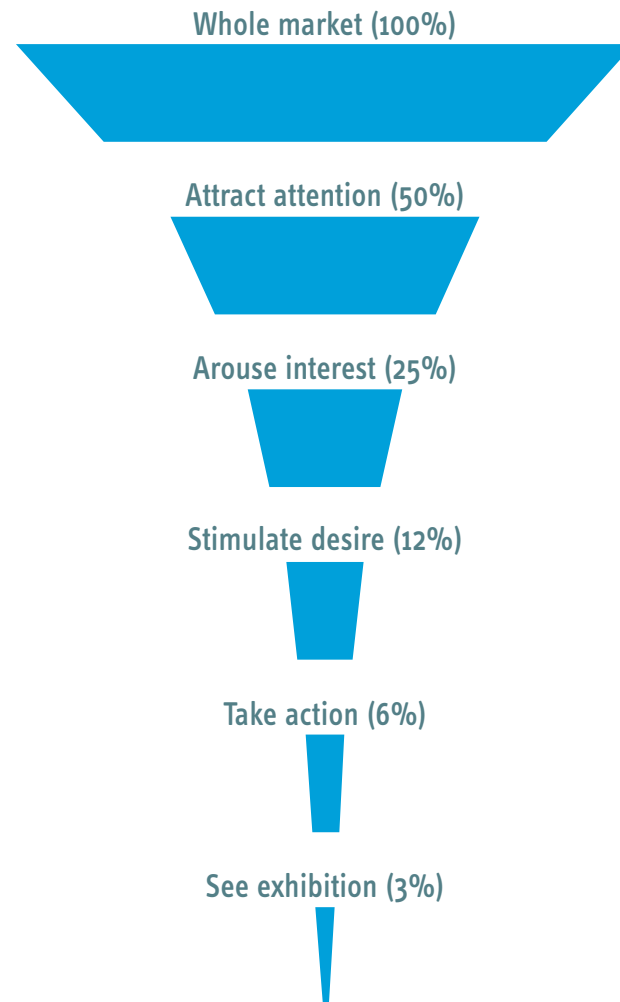




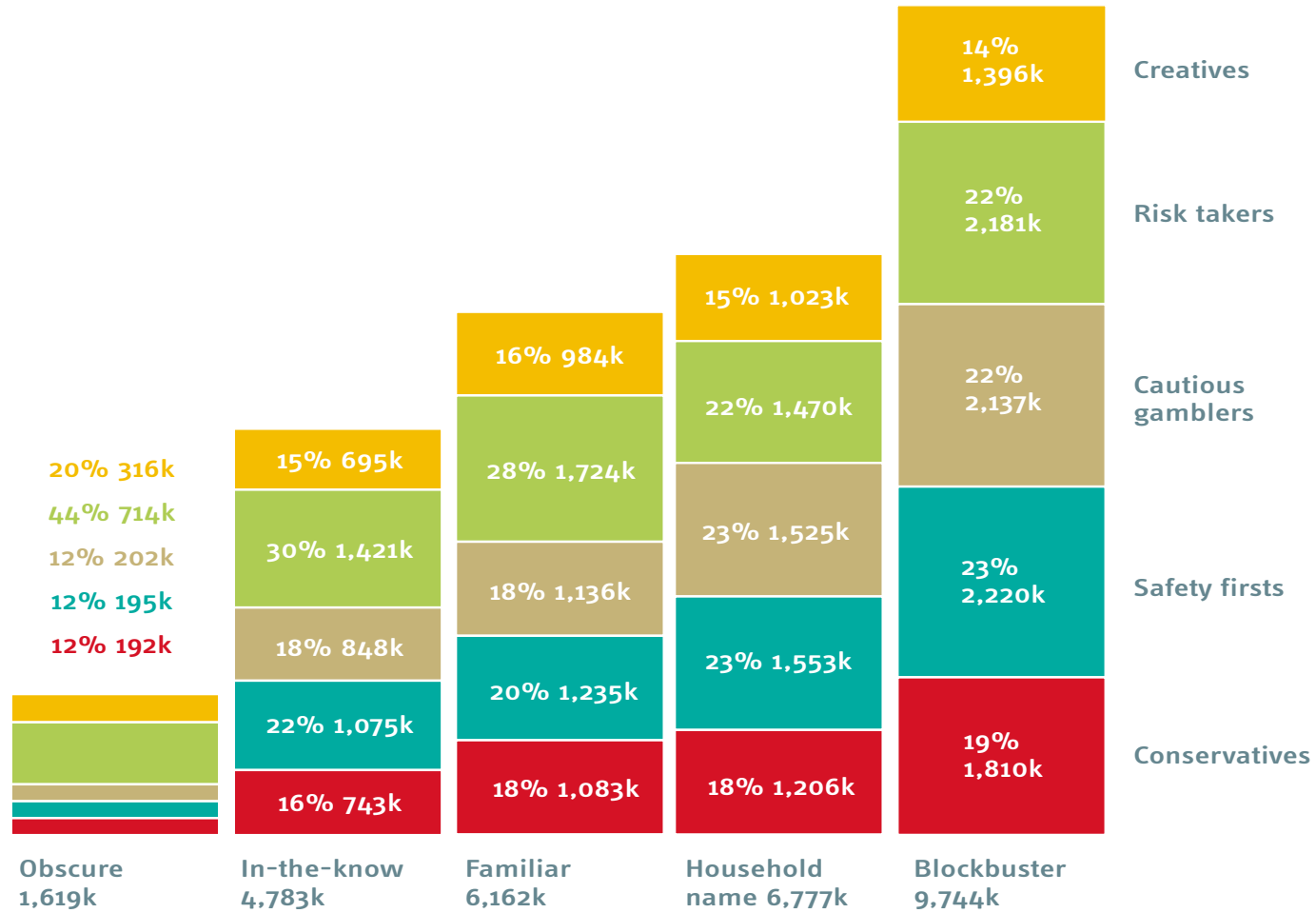
### How visitor cohorts drive ideal exhibition lifecycle



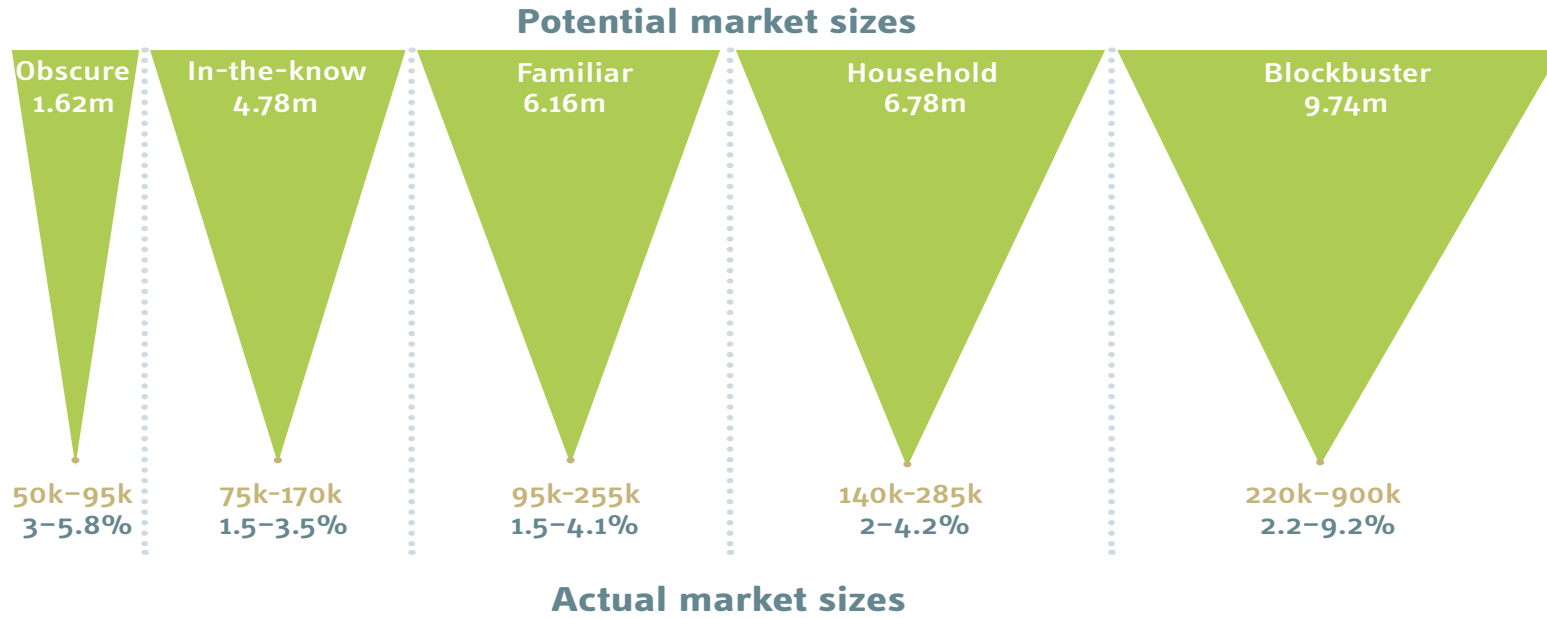
### AIDA decay for paid-for temporary exhibitions in London



Potential market for exhibition levels by visitor cohort



## Market decay by exhibition level



**What can we do with this insight?**

# Formative evaluation

# Concept testing



*Michelangelo Drawings: Closer to the Master,*  
**British Museum**

# Defining the market

**Committed**

**Enthusiastic**

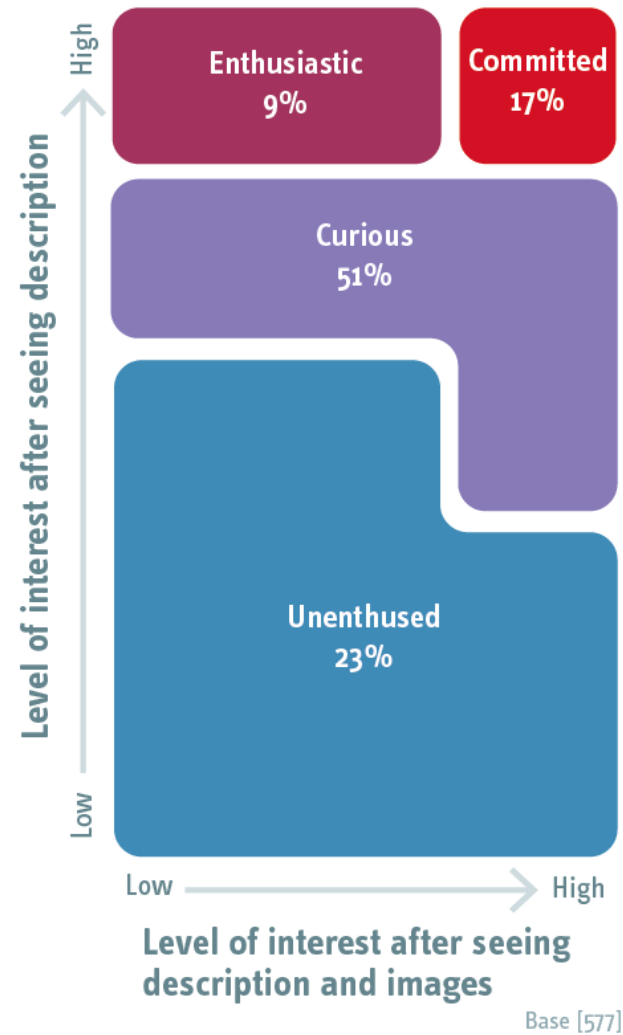
**Curious**

**Unenthused**



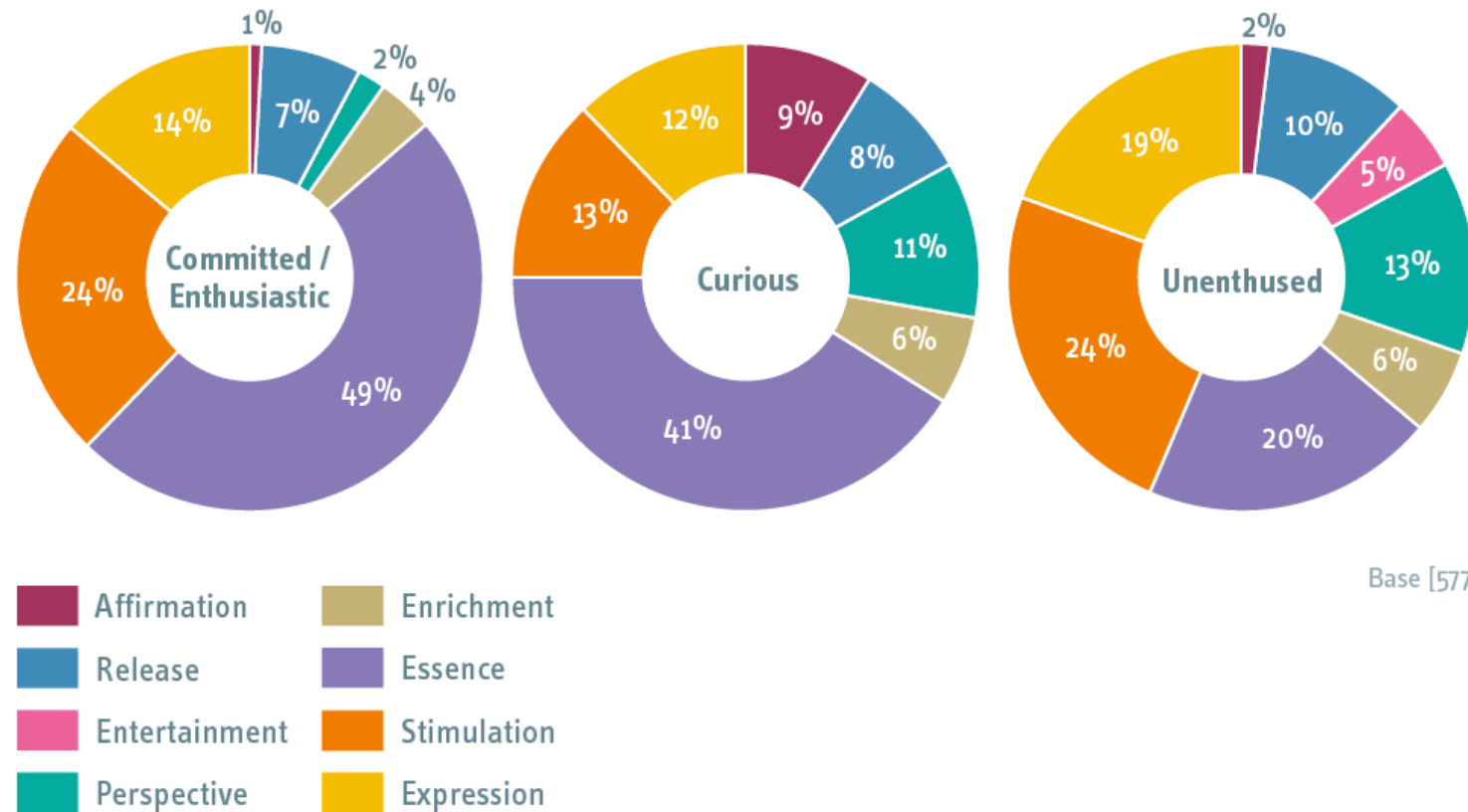
# Half the market are curious

Real level of interest in the exhibition



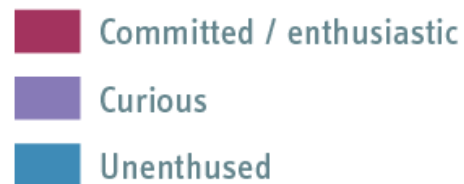
# Appealing to the Culture Segments

Real level of interest in the exhibition cross-analysed by Culture Segment



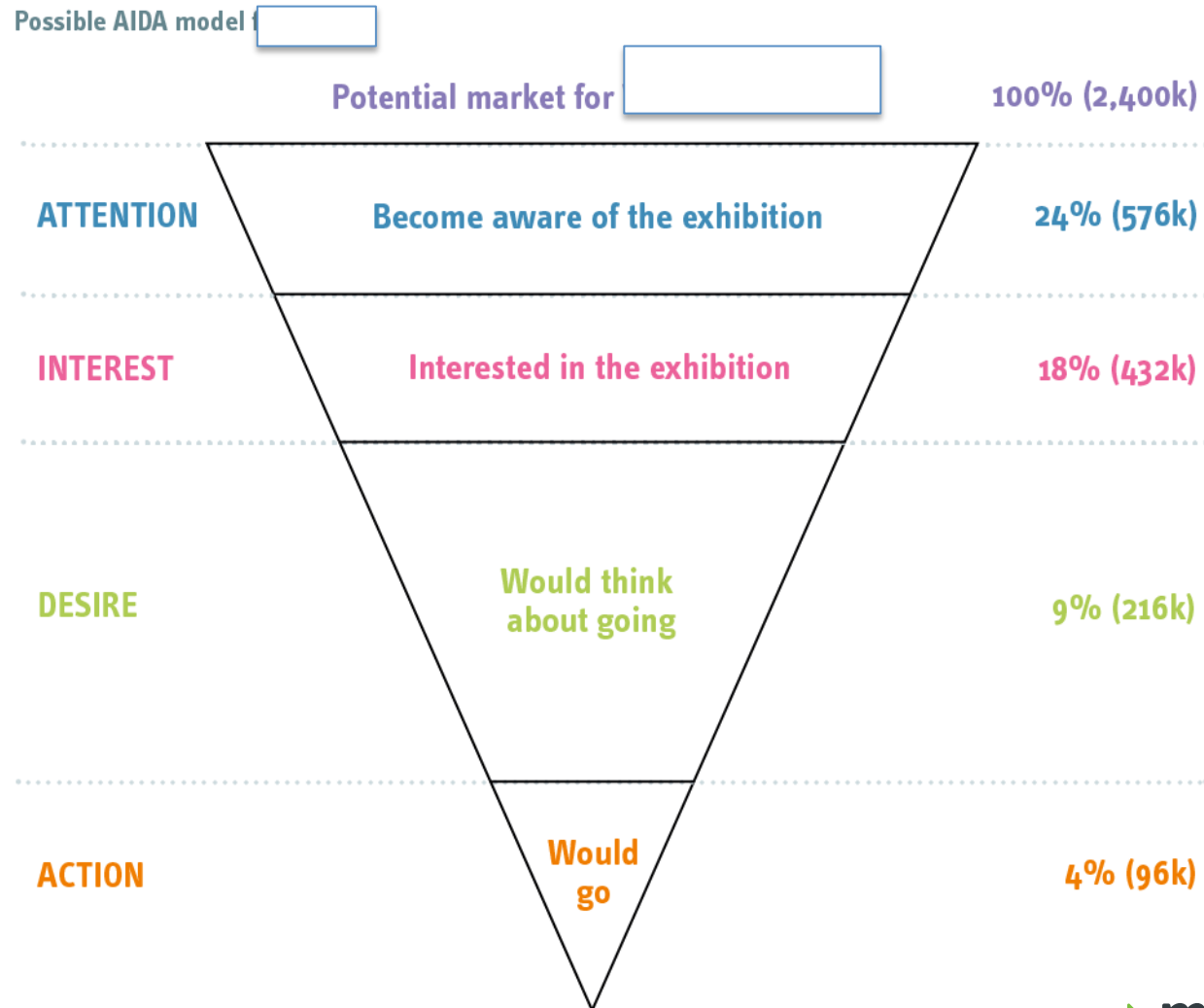
# Targeting Essence, Expression, Stimulation

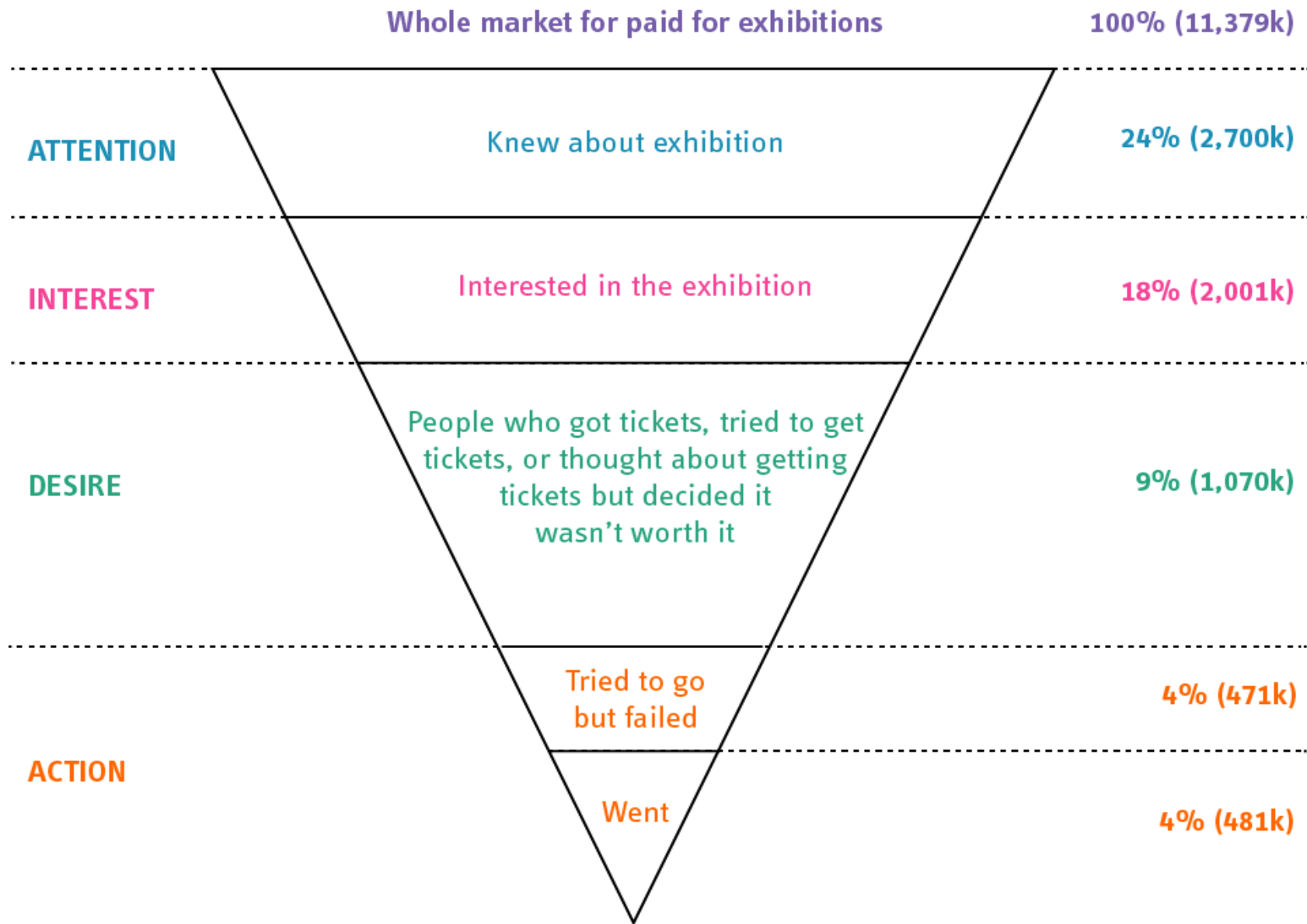
Essence, Expression and Stimulation's real level of interest in the exhibition



Base [377]

# Minimising decay





# Identifying critical success factors

- Providing visitors with the stories they desire

*'The best exhibitions, they've some sort of cohesion. There is a narrative to the story. You come away and you are either appalled or educated or enlightened or it just took your breath away.' Stimulation*

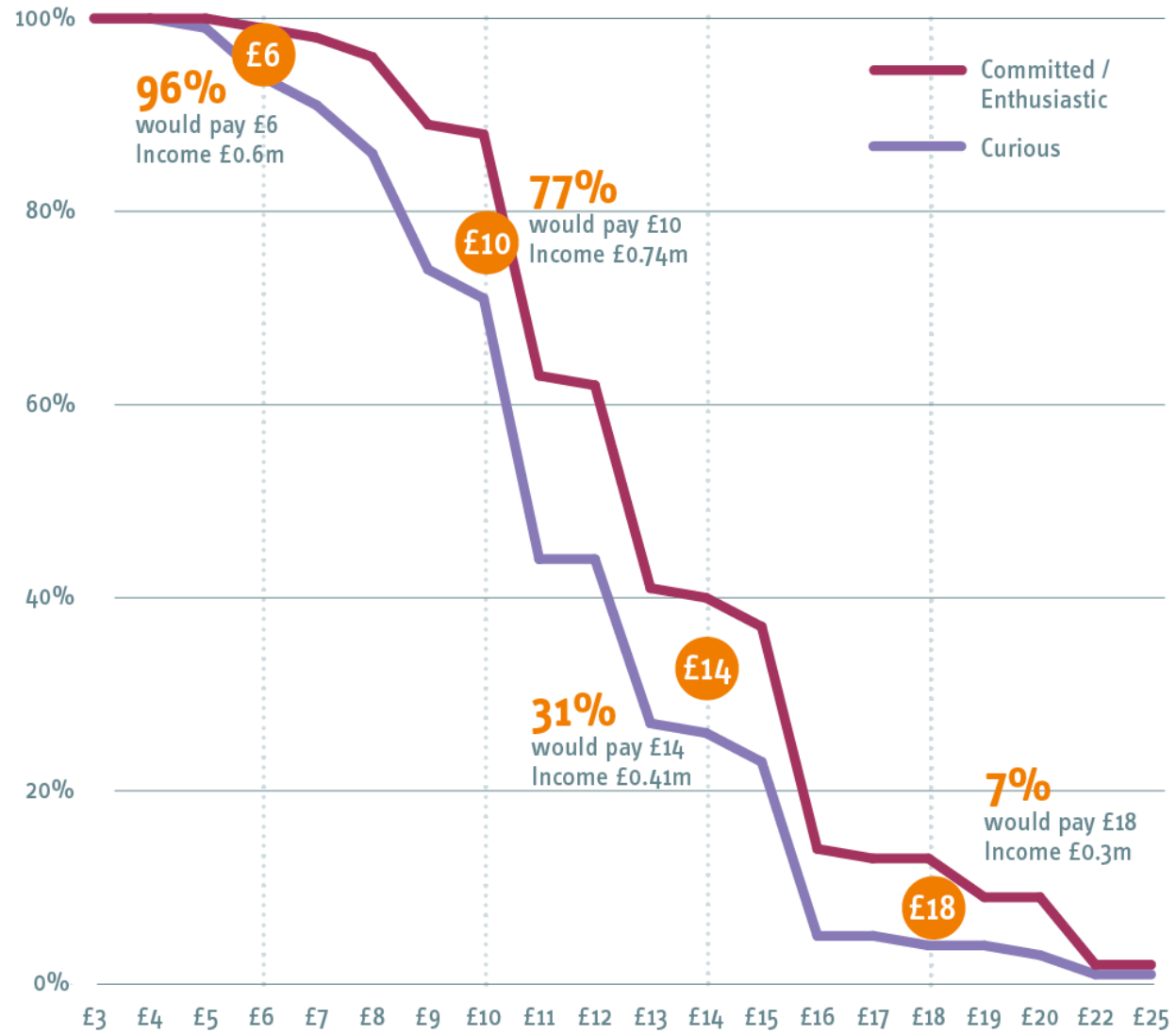
- Differentiated images/ messages/ activities/ campaigns for different segments or clusters
- Providing sufficient information to enable quick word of mouth recommendation
- Work hard on the proposition
- Poster images and copy that fuel positive expectations
- Outcome-focused visit experience to ensure high satisfaction and strong word of mouth
- Maximising opportunities to visit
- Over-turning perception its sold out

# Identifying critical success factors

- **ATTRACT**
- **ENGAGE**
- **OUTCOME**

# Maximising income

\_\_\_\_\_ a ticket pricing: willingness to pay for Committed / Enthusiastic and Curious





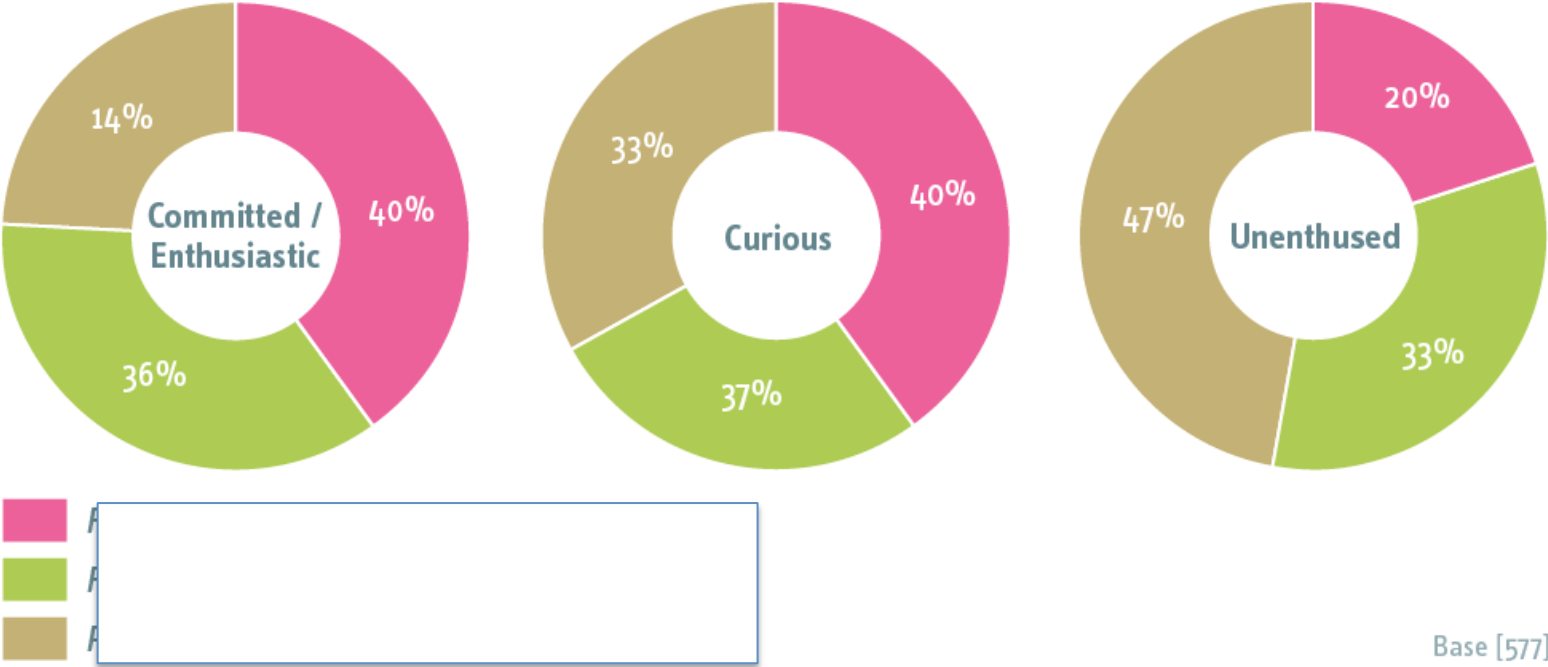
# Proposition testing



*Leonardo da Vinci: Anatomist,*  
**The Queen's Gallery**

# A title that holds promise

Which title reflects the content of the exhibition the most effectively?



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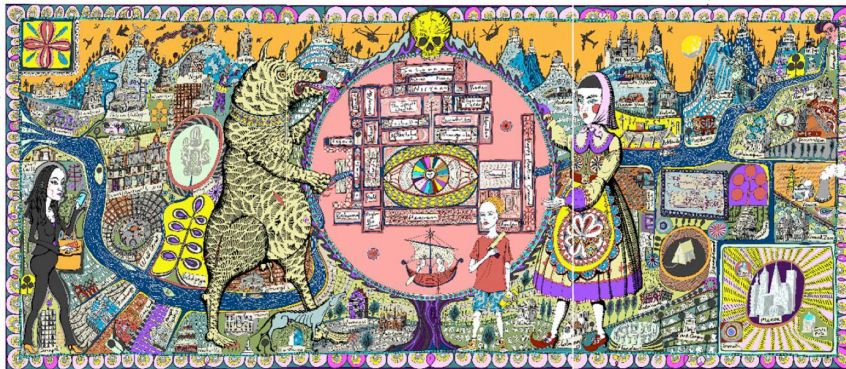
# Testing messages





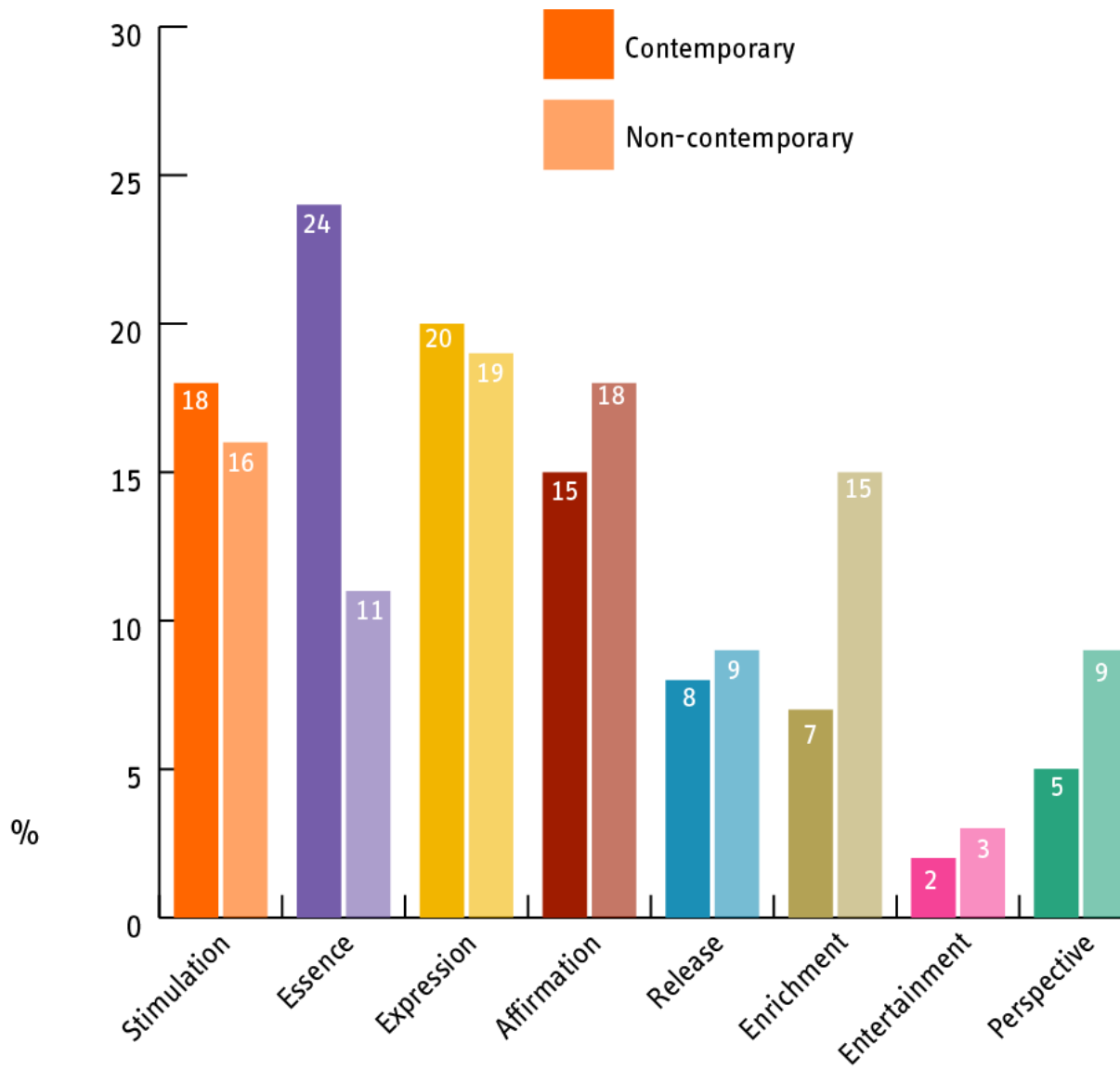
THE  
BRITISH  
MUSEUM



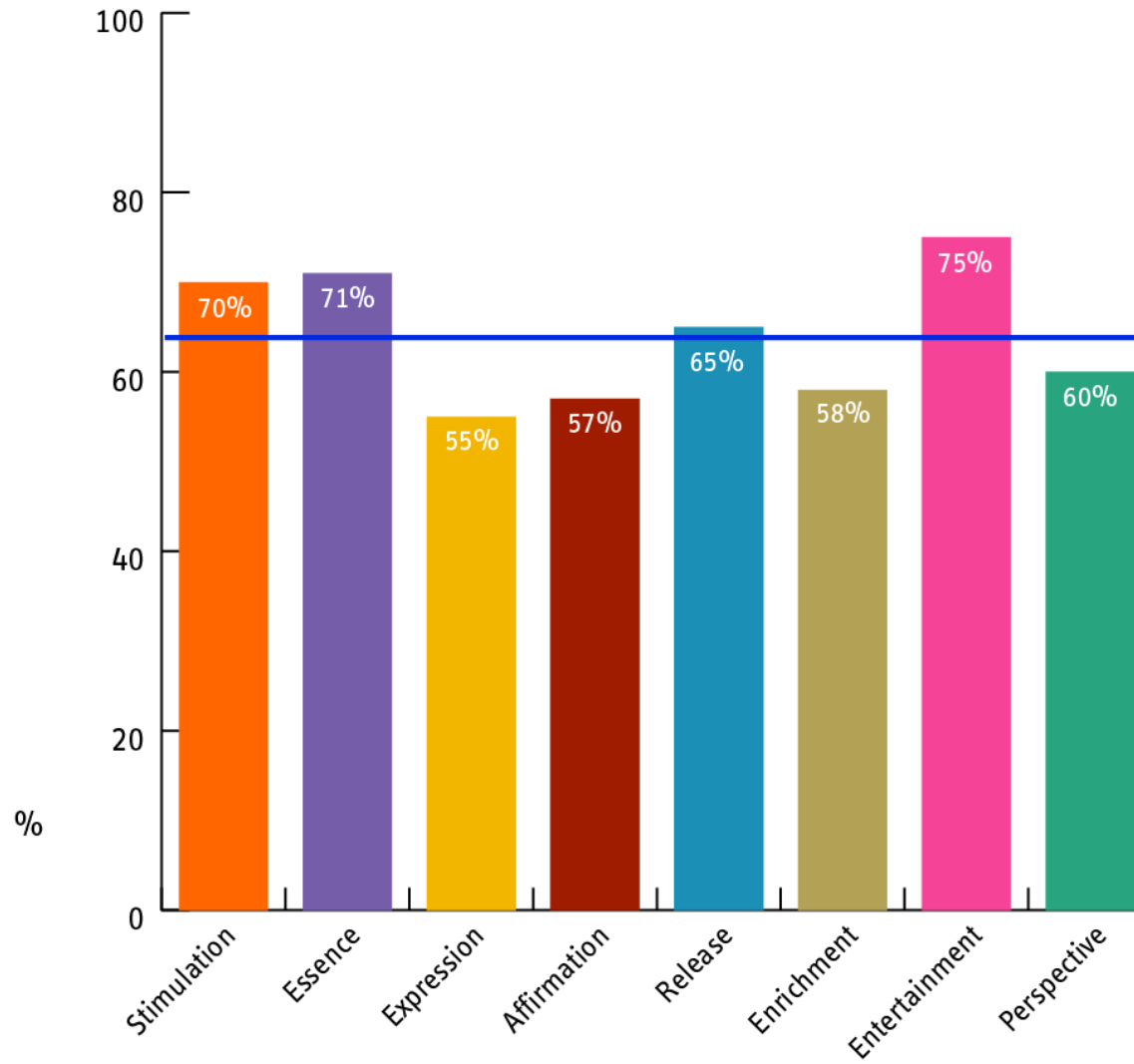


## The objectives...

- Exhibition ticket sales target of 60,000
- Drive secondary spend (membership, merchandise sales and catering opportunities)
- Engage audiences in London and South East
- Position the British Museum as a venue for contemporary art, and the collections as an on-going source of inspiration

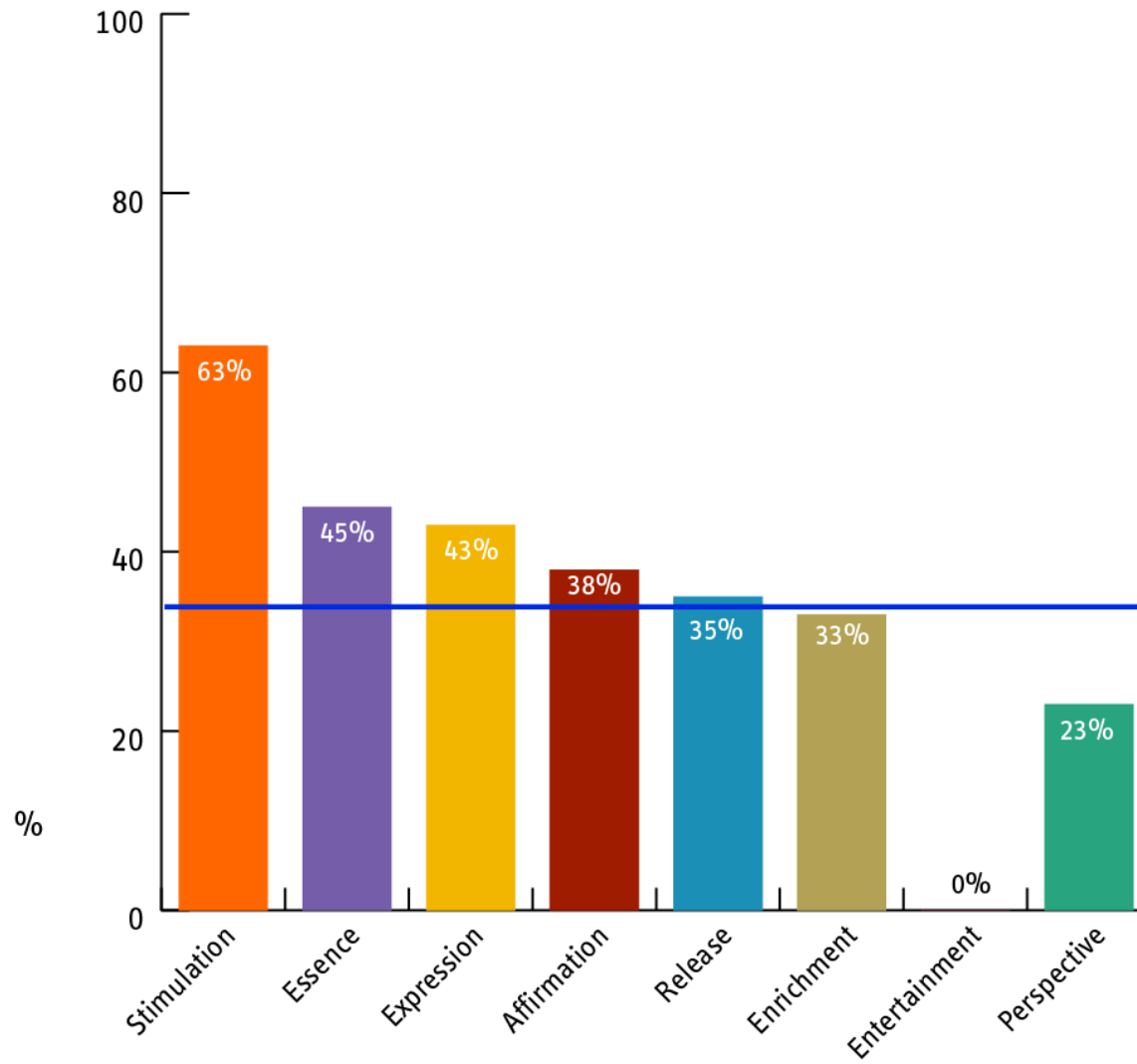


## Recognition of Grayson Perry (Clare)

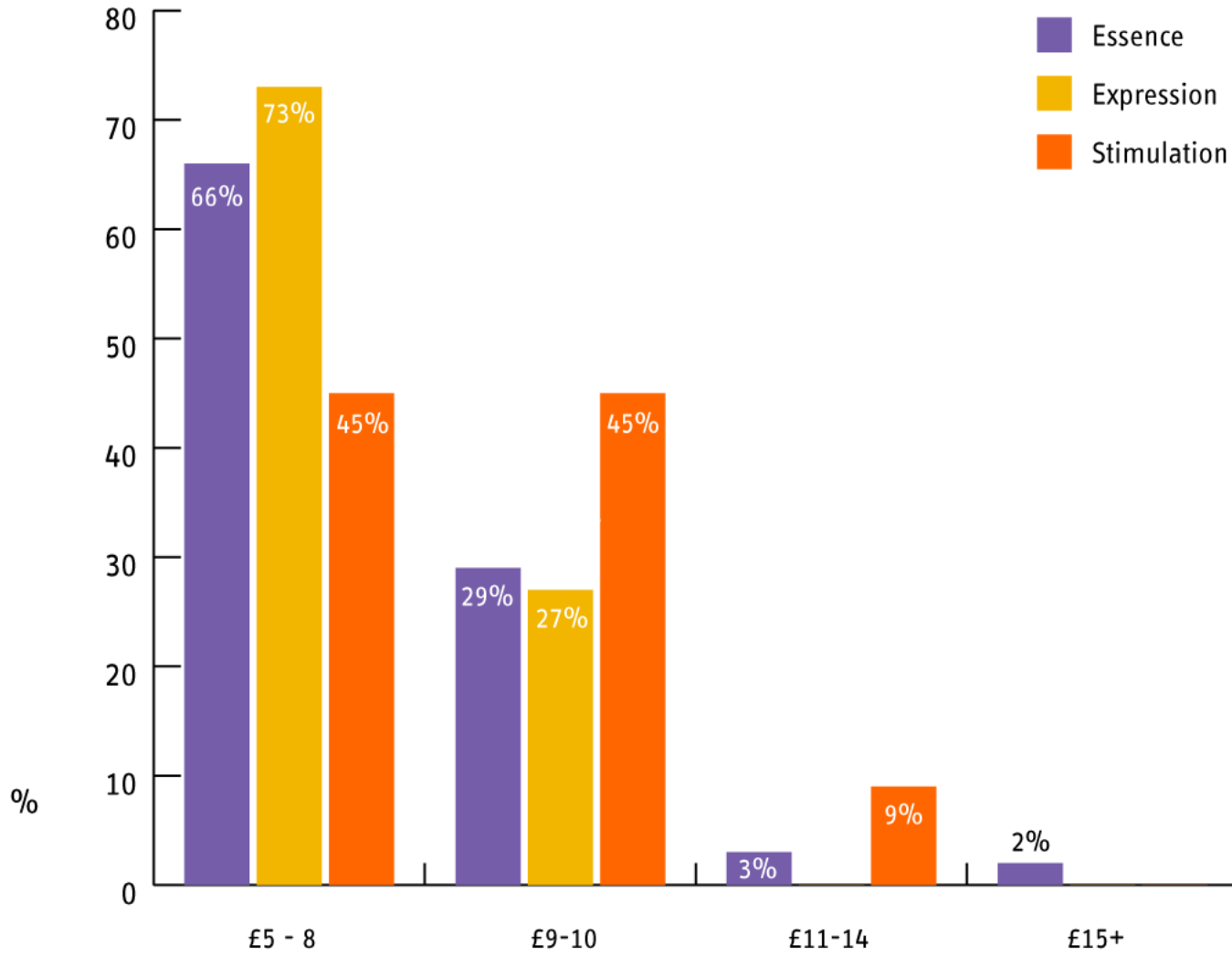




## Interest in Grayson Perry as an artist



# Amount would pay







The British  
Museum

# Grayson Perry The Tomb of the Unknown Craftsman

Until 19 February 2012



Open  
late on  
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# Grayson Perry The Tomb of the Unknown Craftsman

6 October 2011 – 19 February 2012

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Grayson Perry curates an installation of his new works alongside objects made by unknown men and women throughout history from the British Museum's collection. [Read more](#) >

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*Seeing it in this context and the whole idea... the way he takes something that is very staid and traditional like ceramics and makes social commentary art out of something that is essentially very staid. That might relate to collections in the British Museum which are iconographic and ceramics as well and so immediately it has that kind of conversation and intriguing*

**Essence**

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# The British Museum

 **British Museum**  
britishmuseum's Channel



1:18 / 2:16

**Grayson Perry: The Tomb of the Unknown Craftsman, exhibition at the British Museum**

From: britishmuseum | 1 Jul 2011 | 7,255 views  
Book exhibition tickets now: <http://bit.ly/mcHbj3>

Grayson Perry introduces the exhibition of his new works alongside objects by unknown craftsmen throughout







*If you did an audience with Grayson Perry that would be something for the diary and you could get tickets and come along and see the exhibition and have the chance of a question and answer session and if there is an evening afterwards and the bar was open. Yeah I think that would be a great event*

**Stimulation**

THE BRITISH MUSEUM

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### Competition



00:00 / 01:37

**WANTED: charismatic bears with great brains and delusions of grandeur**

Does your teddy bear have what it takes to be the stunt double of Grayson Perry's infamous teddy, Alan Measles? This is your teddy's chance to take the spotlight in front of thousands of visitors.

Artist Grayson Perry is looking for three teddy bears to star in his exhibition at the British Museum. His childhood teddy Alan Measles (and the god of his imaginary world) needs to take a break.

The chosen stunt bears will sit for just over one month each in the teddy shrine on the back of his motorbike on display in the Museum's magnificent Great Court.


Grayson will shortlist 12 teddies that have been well loved, and those that share the inspirational spirit of Alan Measles. They will also need to be small enough to fit on the seat of the shrine. The finalists will then face the public vote to find the final three winners.

If your teddy bear is selected, you will also win a pair of exhibition tickets, a tote bag from the exhibition range and a catalogue written by Grayson Perry.

To enter the competition and give your bear his or her six weeks of fame, just complete the application form below.

[Important information and conditions](#)

[Enter now](#)



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## Teddies battle it out for a seat on back of Perry's motorbike

Louise Jury, Chief Arts Correspondent  
7 Sep 2011

Recommend 11 +1 0

More than 2,200 people have voted in a competition held by the British Museum to find a stunt double for artist Grayson Perry's childhood teddy bear Alan Measles.



Shortlist: bears are competing for a place on Grayson Perry's bike

Three winners are to be announced shortly. They will stand in for Mr Measles in the shrine built for him on Perry's motorbike.

Nearly 280 bears applied for three shifts of six weeks at a time on the bike which is to be displayed in an exhibition Perry is curating of museum treasures and his own work.

The Turner Prize-winning artist consulted his 50-year-old bear in choosing a shortlist of 12 which included Jane, the lady of leisure; Dr Schmoor, a consultant vertebrate paleontologist; and Fag Burn Blue, Protector of his master Billywinkle. In his blog, Mr Measles described the process as "emotionally draining".

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THE  
BRITISH  
MUSEUM

## Grayson Perry Late

Friday 11 November 2011  
18.00–21.00

Dance in the silent disco, get hands on  
in the craft fair, watch a fashion show and much more.  
Pay bar.

Activities are free

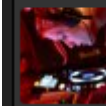
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Loved Grayson Perry @britishmuseum. Baby  
L massively impressed by Alan Measles & I  
loved Mark E Smith immortalised in pot  
form!

• laurenlaverne, [+] Fri 04 Nov 16:04 via Twitter for iPhone



*You are in such danger if you have things at celebrity level because you are automatically going to divide people into those who like or don't like that particular celerity... I wouldn't run because it is Grayson Perry. It wouldn't particularly put me off but I wouldn't come running because it is curated by him. I'd wonder, well why is he curating it?*

**Expression**



## The results...

- Website views increased by over 50% during the exhibition period
- Word of mouth recommendations increased by over 50%
- London-based visitors to the British Museum increased by 50%

## The results...

- 112,194 tickets sold (£10), target of 60,000
- Merchandise sales 500% above target
- Over 800 bookings for catering themed dinner packages and high take up for afternoon tea
- All events reached capacity; Grayson Perry event live streamed into second theatre due to 200% bookings

# Balancing proposition with experience

## Balancing proposition and experience



### Success

Communications maximise conversion from awareness to desire. Exhibition delivers great experience.

### Undersold

Communications fail to do experience justice. Exhibition delivers unexpected benefits - relies on word-of-mouth.

### Oversold

Communications overstate the extent and quality of exhibition. Exhibition experience doesn't live up to the promise.

### Failure

Communications don't attract attention of the market, and the exhibition is not rewarding enough to generate word-of-mouth.



# Summative evaluation

## Push AIDA

Maximise conversation from attention to action in the natural market, through:

- Increasing awareness across potential market
- Targeted marketing: messages and timings
- Monitor and respond to box office data
- Formative research

## Shift exhibition type

Increase the potential market size through:

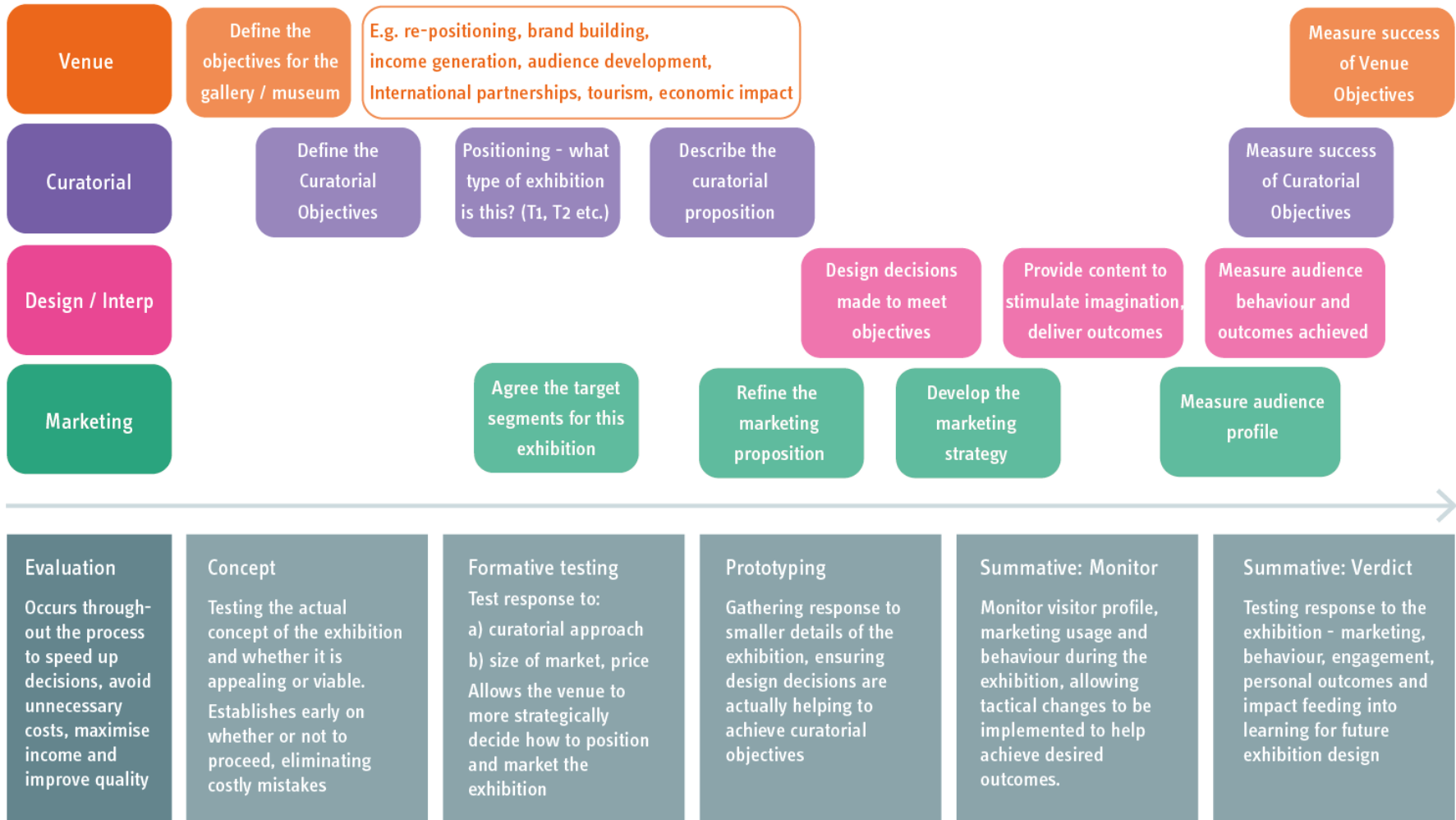
- Balancing the proposition to widen appeal
- Extending opportunities to visit
- Concept testing

## Maximise income

Set prices to maximise take-up and revenue, through:

- Encouraging word of mouth
- Price point testing

# Strategy



**Thank you!**

**[www.mhminsight.com/segment](http://www.mhminsight.com/segment) me**

## SITE Reports



Strategic insight for temporary exhibitions