

## Ongoing Visitor Survey Data and Institutional Response

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The year was 1936, and for the past decade A.B. Wells had satisfied his craving for New England antiques in grand fashion. Already he and his family had moved out of their home in the central Massachusetts town of Southbridge to allow his enormous collection to expand into all of its rooms, and now there was just no more space. On a warm day in mid-July, Mr. Wells proffered a solution to the trustees of his nascent Wells Historical Museum. He proposed that the burgeoning collections be displayed in a complex of new buildings nearby. "I visualized each one of these little buildings holding a specific type of collection," he remembered. "It sounded hot to me, but not very hot to anybody else. I could easily tell, and certainly not to my son George, who knocked it full of holes. He said, 'I don't blame Father for wanting to keep these things that he has bought, and preserve them for future generations. I admit they have tremendous value, historical value, and they will be interesting to many, many people; but to me a museum is a dead institution. No one goes into a museum except old people. There is nothing there to attract the young people and the children coming up'" (Candee, 1976). My son "suggested that to make this material valuable it would be necessary to have a village, a live village, one with different shops operating with employees who ... would know how to use the old tools, the old methods. This was a revolutionary idea as far as I was concerned, and I was taken off my feet. Well, inside of a week," he continued, "we had bought the property at Sturbridge" (Wells, 1979). And the rest is history, nearly 50 years of it.

As a model village of period buildings began to take shape, the project was formalized as the Quinebaug Village Corporation in 1938. Eight years later, in 1946, the public name was changed to Old Sturbridge Village. Through the years, the museum has grown in size and scope to become the third largest outdoor museum in the country, annually attracting nearly 500,000 visitors in recent years. While there have been a number of snapshot studies of our audience within the past two decades, many occasioned as response to external forces – the inflationary spiral of the early '70s, the gasoline shortage of the late '70s, and questions about travel plans during the Persian Gulf Crisis, as examples – we have now internalized the practice of audience research, and have begun an ongoing dialogue with our visitors, each study building upon previous efforts to create an integrated research perspective. In so doing, the study of our audience becomes an

institutional focal point and achieves a dynamic not unlike that between the perceived interests of audience and presentation of collections evinced by George Wells in the formative stages of our museum.

In 1991, we began to systematize the collection of data describing the geographic origin of our visitors. The zip and country codes, garnered from general paying visitors since late in that year, comprise an ever-growing data bank – a daily geographic census of our visitor base – which allows us to find broader patterns across the years or to seek tighter comparisons from day to day. The essential feedback afforded by such data is helpful in gauging our marketing reach and in targeting future initiatives. It is also useful in monitoring and seeking to understand the effects of factors beyond our control, such as regional consumer confidence indices, which correlate strongly with the rise and fall in paid attendance levels (Figure 1).

Powerful as our geographic database is, it provides but one facet of the multi-dimensioned visitor profile. The more human element has been fleshed out through survey data systematically collected on several fronts. We began with our members and former members. Nearly 50 years old, the OSV membership program now numbers some 8,000 individuals. A need for up-to-date data to guide action spearheaded this multi-tiered, integrated research into one of the museum's key audience segments. Our most critical concern was to help understand and stay an alarming rate of attrition among first-year members: over each of the past five years, nearly three-quarters of first-year members failed to renew their membership; 82% had dropped out at the end of two years.

A questionnaire mailed to a random sample of 1,000 then-current members during the spring of 1993 provided critical feedback on motivation for joining the museum, perceived value of member benefits, visiting patterns, and demographic profile. A 63% rate of return, together with lengthy responses to optional open-ended questions, testify to the depth of feeling and strength of association between Old Sturbridge Village and this core constituency. Knowledge of respondents' identity has allowed us to further segment the group, distinguishing those first-year members in the original sample who renewed their membership a year later from those who did not. This has helped us understand the dynamics of the renewal process.

Further understanding was afforded through another questionnaire mailed during the winter of 1993-94 to a random sample of 1,500 former members who had recently lapsed after only one year of membership. This instrument elicited response in the same areas as the current member survey while also probing for factors and motivations in making the decision not to renew. Through a variety of measures, including tenacious follow-up, we achieved a near 47% response rate from a group which had severed its relationship with the museum.

In our most ambitious project to date, we have markedly increased our understanding of the casual visitor to Old Sturbridge Village. Through analysis of nearly 2,800 responses from a four-season exit survey

administered to casual visitors as well as museum members in 1993-1994, the demographic profile is being both expanded and woven together with such indicators as expectation, motivation, leisure preference, and evaluation of the museum experience. The data offer insights into similarities and differences between the member and casual visitor groups.

The demographic profiles of our casual visitors, members who have persisted more than one year, and first-year members – that pivotal group in its non-persistence – are quite similar. On balance, they clearly fit the mold of museum-goers nationwide, with the member groups ranking a bit higher than the casual visitors in each modal category. All are very well educated, 60 to 70% of them college graduates; they are affluent with median household incomes greater than \$60,000; the majority hold professional positions; and most are married. Notably, in each of these measures, our visitor and member groups rank significantly higher than the United States population as a whole (Figure 2) (U.S. Bureau of the Census, 1993).

By age category, those in the 35 to 54 year range are again more highly represented in our visitor mix than their proportion at either national or regional scales. They, together with the 55 to 74 year-olds comprise nearly three-quarters of our casual visitors, 82% of first-year members, and more than 92% of our longer-term member groups, and are key target audiences. The largest growing segment of the population, the mature market, will be an ever important element in our audience mix for years to come.

Age is a contributing factor in the between-group differences across several other demographic variables. For example, while 27% of casual visitors come to the Village in nuclear family groupings only, nuclear family visits increase to 41% for longer-term members, and swell to 57% among first-year members. The presence of children in these visit groups also rises, correspondingly, from just more than half for casual visitors to three-quarters among first-year members. And the proportion of families in which both parents work, similarly increases and is, again, highest for the younger first-year member group.

While analysis of variance reveals no differences in the importance Hood's six leisure criteria hold for the museum's casual visitors, first-year, and longer-term members when choosing their leisure activities (Hood, 1989), differences are expressed in the activities the group members engage in, the places they choose to go, and their motivation for including Old Sturbridge Village in their leisure plans. For example, longer-term members reported participating in antiquing and in sewing and needlework more than any other group; for first-year members it was family activities and playing with children; and for casual visitors, indoor and outdoor sports.

Differences were also expressed in the frequency of outings by the three groups to various leisure venues. While all frequented amusement or theme parks, art museums, and musical performances in much the same pattern, longer-term members were more frequent visitors to arboreta and botanical gardens; to history museums, and to historical sites; first-year members

more often frequented parks or beaches, science centers or museums, and zoos and aquaria; while casual visitors more often than the others attended professional sporting events.

Similarly, differences between the groups are expressed in the motivation of each in choosing OSV as the day's leisure destination. While the visit choice for longer-term members is more strongly colored by anticipation of relaxing and escaping from everyday routines and enjoying an attractive, friendly environment, first-year members more than others are seeking to provide a learning experience for their children, to have fun with their family and friends, and to experience a part of America's past. Learning more about New England's history and visiting a place they always wanted to see are, in contrast, the standout factors for the museum's casual visitors.

Describing these three audience groups via standard frequency, cross tab, and ANOVA measures, as just done, is certainly useful in highlighting group differences and in illuminating broader patterns. Applying such market segmentation techniques as cluster and CHAID (Chi Square Automatic Interaction Detection) analysis to the same data sets has elucidated the significant interplay between the demographic and leisure preference indicators and has more meaningfully defined pivotal relationships that will strengthen our strategic planning process and that have already guided action plans.

Let's look first at the area of overall visit satisfaction, as measured on a ten-point scale. While on the whole, longer-term members tendered the highest score, followed by first-year members and casual visitors, it is to the casual visitor group that we turn, this key audience segment annually comprising nearly 90% of museum visits. Examining the relationships between high visit satisfaction and the demographic and attitudinal indices we've discussed, we find that choosing to visit OSV in order to enjoy an attractive, friendly environment is the most significant variable in predicting high visit satisfaction. Those visitors for whom this was very important, for whom the decision to visit was highly influenced by a previous visit as an adult, were female, and for whom entertaining out-of-town guests was an important motivation were nearly twice as satisfied with their museum visit as the casual visitor group at large. Those for whom an attractive, friendly environment was important, experiencing a part of America's past was very important, and whose frequent leisure activities included traveling, also tendered a much higher rate of satisfaction.

A related measure of satisfaction, the intention to visit again within the year was, not surprisingly, found to be most keenly associated with the distance between home and the museum: the closer one lives to the Village, the more likely is the near-term intention to return. Interestingly, different sets of predictors held sway within the various distance brackets. For example, those living within 50 miles for whom choosing the Village as a place to relax and escape from everyday routines was most important and for

whom sharing their leisure experiences with others is very important, were nearly twice as likely to plan to return within the year as the entire casual visitor group. For those within 50 to 75 miles of the museum, frequency of visits to historical sites and the importance of the Village as a place to relax were the key predictive variables. And among the next tier, 75 to 125 miles away, those for whom the choice of the Village as a place to have fun with family and friends was very important and among whom this was a first visit to the museum were more likely than any others in this bracket to plan a return visit within the year (Figure 3).

Among those in the casual group who were, themselves, repeat visitors (49% of the sample), the most significant predictor in sparking their return was the draw of the Village as a place to relax and escape. Other related variables included the relative unimportance of learning about New England's history, a positive association with the Village as an arena for childrens' edification; or with the importance of entertaining out-of-town guests for those in which a child was in the visit group and among whom 'sports' are not a primary leisure activity.

Those among the casual visitor group who requested information about the Village's membership program (a check-off option on the survey form) – again a heightened expression of satisfaction in the day's visit and interest in the museum as a more frequent leisure destination – were, not surprisingly, first defined by distance from the Village: those who live within 75 miles are significantly more likely to express interest. Visitors from within this distance threshold who did not indicate reading as one of three frequent leisure activities, who frequently attend musical performances, and who primarily chose to come to the Village because of the attractive setting were more than three times as likely as any other segment within the 75-mile group to request membership information.

Predictive relationships among these key variables continue to be evaluated and will certainly inform near-term initiatives to increase the gate, among both first time and repeat visitors, and to grow the ranks of membership. We are gratified at the success of several initiatives we have already undertaken after a reading of the data from our current and former member groups. In brief, among the current members, standout differences between those who renewed versus those who lapsed after one year were the importance among the renewing group of satisfaction with membership benefits, their willingness to pay a higher membership fee for increased benefits, and the significance that participating actively in the institution held for them as a reason to maintain their membership. Evaluation of these and other factors caused us to expand the member benefit package – at no additional participant cost. Consequently, year-to-date membership sales are up 20%, renewals are up 8%, and we have helped stay the dropout from the ranks.

Secondly, analysis of the former member group revealed a significant cluster for whom the pricing advantage between membership and regular

admission was a prime motivation in joining, and for whom price was a renewal barrier. We discovered a predictive relationship between those who strongly favored a potential admission option of an annual pass – a non-membership program offering unlimited visits yet at a price less than a standard membership – and the great importance of unlimited free admission, lesser importance of family activity program discounts, and the significance of the pricing advantage at the time they initially joined. Acting upon this data, we initiated an Annual Pass program a year ago. Today, 3,000 Annual Passholders strong, the program having generated more than \$150,000 in revenue, the combined Membership and Annual Pass numbers up 40%, and even lapsed members responding favorably to outreach initiatives to rejoin as Annual Passholders, we feel we made a good decision, informed by solid data.

Lastly, analysis of data from among all groups, including the finding of a general desire for more participatory activities for children, particularly among the first-year member and casual visitor groups, and the fact that nearly 60% of casual visitor groups that include children originate in the New England sub-region, has helped spur a new Old Sturbridge Village Kids Club – an inexpensive, value-filled package offering a heightened, hands-on engagement across the seasons.

The Kids Club program is a brand new initiative, and we are eliciting participants' comments and suggestions to help shape program offerings and direction. We shall systematically survey the group within a year's time. Soon we shall survey the Annual Passholder group, meshing their profile against the broader backdrop of casual visitors and against member and former member groups. A corporate member survey is now underway, and a sensitivity to admission price survey is in the works to provide current data to compare with that collected some six years ago. We shall also return on an ongoing basis to our member and casual visitor groups to measure change and stasis against our benchmark studies.

Today, on the eve of our 50th anniversary, Old Sturbridge Village faces a number of challenges and critical issues. Chief among them is the fact that our earned income, heavily dependent upon attendance, accounts for nearly 90% of total revenues. This makes us particularly vulnerable to fluctuations in consumer confidence, the economic environment, and even the weather. As our admission rates increased faster than the consumer price index over a recent 10-year period, we have seen a decline in attendance and a corresponding increase in the median income of our visitor base against that for the nation as a whole. Significant changes in available leisure time, in leisure opportunities, and in perceived needs are other ongoing factors, as is our saturation of the New England market, where large segments of several generations within the region have already "done" Old Sturbridge Village.

Within a day's trip to the museum, however, are the populace of five states which each rank among the top ten nationally both in terms of household disposable income and in the numbers of college graduates (U.S.

Bureau of the Census, 1993). The combined indices offer some solace and encouragement as we further target our market.

We are encouraged, as well, by a recent *Cowles Magazine* study which finds that over 40 million American households are estimated to contain at least one head of household who is "very interested" in visiting historical places, and that in a projected 16 million American homes, at least one head of household is "very interested" in early American homes, gardens, and history (*Cowles Magazine, Inc.*, 1994).

We watch, with interest, the plans by the National Trust for Historic Preservation to mount a new Heritage Pass Program, which combines a convenient, no-hassle travel planning and information service for America's historic sites, history museums, battlefields, accommodations, restaurants, and the like. And, as we finalize our home page, we are interested to see the demographic profile of Internet users square strongly with that of our own member and visitor groups (*Boston Globe*, 1995).

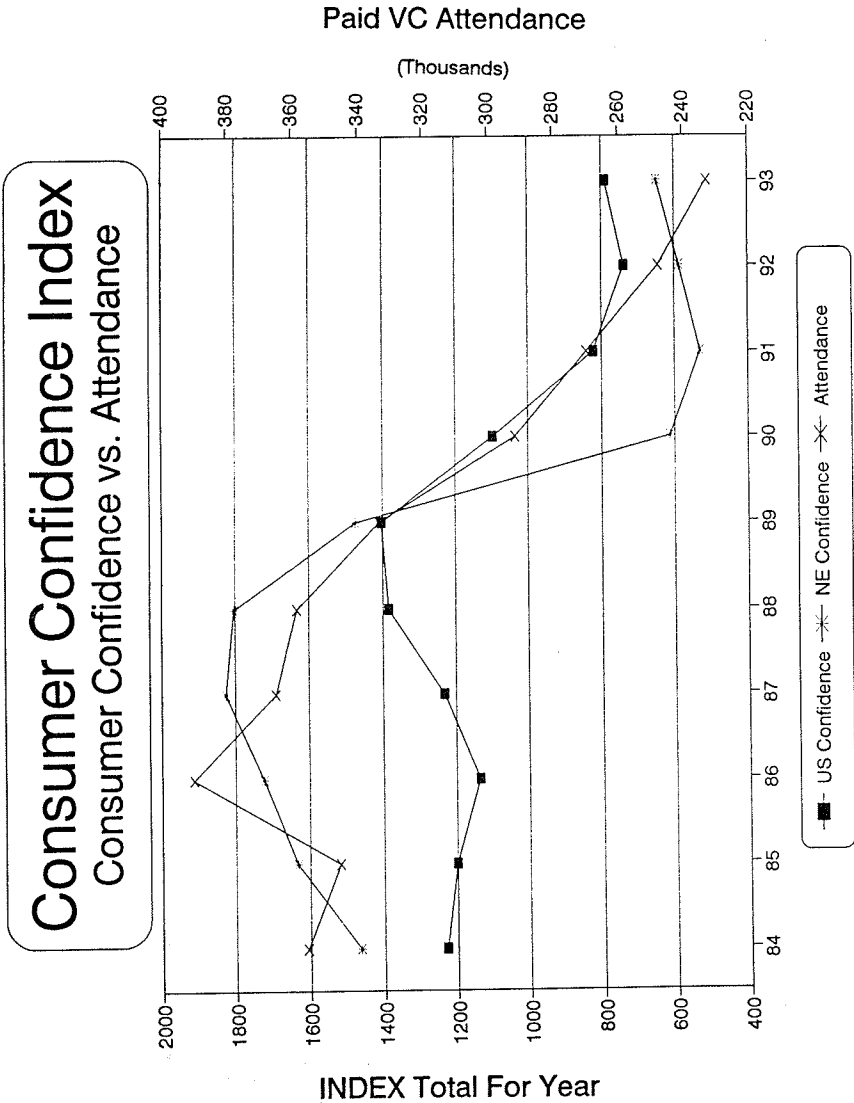
In each of these instances, and in others which intersect with our strategic planning process, we are only able to map and understand the shape of the boundaries between our museum visitors and those external entities and forces which both offer opportunity and impose constraint, through the integrated measures we have begun to undertake. And it is this knowledge, more than anything else, which will help us move forward with renewed vigor, clarity, and vibrancy as we plan for our next half century and beyond.

## References

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Figure 1

There is a significant correlation between the rise and fall in Old Sturbridge Village paid admissions and the Consumer Confidence Index for the New England region.





**Figure 2**

Demographic profile of Old Sturbridge Visitors compared with U.S. population as a whole. Sources: 1993/1994 year-long exit survey of Old Sturbridge Village visitors (n=2,655); *Statistical Abstracts of the United States: 1993*.

| <b>Old Sturbridge Village</b>   |                           |                          |                       |                    |
|---------------------------------|---------------------------|--------------------------|-----------------------|--------------------|
|                                 | <b>Longer-Term Member</b> | <b>First-Year Member</b> | <b>Casual Visitor</b> | <b>U.S. (1992)</b> |
| <b>4-Year College Degree:</b>   | <b>61.5%</b>              | <b>62.7%</b>             | <b>59.5%</b>          | <b>21.4%</b>       |
| <b>Median Household Income:</b> | <b>\$60 - 70,000</b>      | <b>\$60 - 70,000</b>     | <b>\$60 - 70,000</b>  | <b>\$31,000</b>    |
| <b>% Married:</b>               | <b>91.6%</b>              | <b>91.7%</b>             | <b>80.2%</b>          | <b>55%</b>         |

### Figure 3

CHAID analysis of O.S.V. visitor survey data indicated that the distance between home and the museum was the key predictor of the intention to revisit within the coming year. While the overall intention diminished with increasing distance, we found that the importance of certain leisure preferences and motivations in the initial museum visit substantially heightened one's plan to return to Old Sturbridge Village. As seen above, these secondary factors differed within each distance bracket.

#### **Plan Another Visit to OSV Within the Next Year**

***\* Distance from Old Sturbridge Village \****

##### **Less than 50 Miles**

- Relax and escape from everyday routines
- Sharing the experience with other people

##### **50 - 75 Miles**

- Frequent visitors to Historical Sites
- Relax and escape from everyday routines

##### **75 - 125 Miles**

- Have fun with my family / friends
- First-time visitor