



The Junior Enterprise of the University of Westminster

Westminster Business Consultants
Suite Number C173; 35 Marylebone Rd.
London NW1 5LS; United Kingdom
Tel: +44 (0) 207 911 5875
Fax: +44 (0) 207 911 5878
office@wbc-uk.com [www.wbc-](http://www.wbc-uk.com)

Alun Tlusty-Sheen
&
Eilidh Macdonald
WestmARC
5th Floor, Copland Building
115 Cavendish Street
London W1W 6UW

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Museum Dwell Time v. Visitor Expenditure
“Museum Leaflet Project”

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Summary

This report outlines the results of the Museum Dwell Time v. Visitor Expenditure – “Museum Leaflet Project” undertaken by Westminster Business Consultants (WBC) on behalf of WestmARC in October 2006.

The aim of the study was to investigate whether research has been conducted and published on the potential correlation between dwell time and the amount of visitor expenditure in museums. The results represent information gathered from existing literature pertaining to (1) London museums specifically and (2) the museums industry universally. The methodology included: secondary research of electronic resources and industry specific publications (hard copies).

The resource outlets researched comprise the project sample. The final project sample is defined as: **Electronic Resources**, including: (1) online journals, (2) museum organization/association websites, (3) social/cultural trends (leisure activity) websites and (4) the top 5 visited museums in UK websites and **Industry Specific Publications (hard copies)**, including: (1) museums studies specific publications, (2) arts & business specific publications and (3) social/cultural trends market research specific publications.

In order to establish a consistent researching framework, the resources were then further classified into a “publication research sector” and a “website research sector” each with corresponding research terms tailored to the outlet.

The three outlets designated as, “publication research sector” include: museums studies specific publications, social/culture trends market research specific publications and arts & business specific publications. The three outlets comprising the “website research sector” are: investigation of: museum organization/association websites, social/cultural trends (leisure activity) websites and the top 5 visited museums in UK websites.

The qualitative study indicated that little statistically sound information has been published regarding a potential correlation between visitor “dwell time” and the amount of visitor expenditure in museums.

While museum visitor demographics and customer satisfaction studies comprise the bulk of museum industry market research, analysis of developing social and economic issues foreshadow future investigation into a topic like the potential correlation between visitor dwell time and visitor expenditure in museums.

The report has been divided into 5 main sections: (1) background information about the project; (2) the methodology and its implementation; (3) results and analysis; (4) conclusions and recommendations and finally (5) a list of Appendices.

1 Introduction

1.1 Objective

The objective of this project was to investigate whether research has been conducted and published on the potential correlation between dwell time and the amount of visitor expenditure in museums. The results represent information gathered from existing literature pertaining to (1) London museums specifically and (2) the museums industry universally.

This secondary research study investigates literature accessed through:

- Online Journals
- Museum Organization/Association Websites
- Social/Cultural Trends (Leisure Activity) Websites

- Top 5 Visited Museums in UK Websites
- Museums Studies Specific Publications
- Arts & Business Specific Publications
- Social/Cultural Trends Market Research Specific Publications

1.2 Deadline

WBC completed and electronically delivered this project on the confirmed date: 9:00 16 October 2006.

1.3 Overview of Undertaken Activities

It was agreed that WBC would undergo secondary research on electronic resources and industry specific publications. The research would be based on qualitative methods. The detailed Project Methodology is discussed in section 2.

2 Research Methodology

2.1 Methods employed

The project required secondary research and involved qualitative analysis. Methods that were employed and their explanations are presented below.

Secondary Research:

Included the analysis of selected literature resources. The project sample was built through: (1) the initial research outlets that were proposed by WBC and approved by WestmARC prior to the initiation of the study and (2) the use of necessary additional sources was employed as the researching process progressed.

2.2 Project Sample

The aim of the sampling process was to ensure that the project sample would offer information relevant to achieving the research objective: investigating whether research has been conducted and published on the potential correlation between dwell time and the amount of visitor expenditure in museums.

WBC initially examined its proposed project sample, as stated in the agreed upon proposal. Those research outlets included:

- a) Electronic Resources
 - a. Online journals
 - i. Journal of Conservation and Museum Studies
 - ii. Museum and Society
 - b. Magazines and reports
 - c. British Museum Association website
 - d. Industry statistics, if any
- b) Need industry specific, academic/reference oriented publications [hard copies], such as:
 - a. Museums Journal
 - b. Museum Practice
 - c. Museum Services Directory
 - d. Museums and Galleries Yearbook
 - e. NEMO Newsletter

After thorough investigation of the proposed research outlets yielded little relevant findings, WBC project consultants expanded the search outlets beyond museums studies specific resources. Additional research outlets included: social/culture trends market research and arts & business.

The **main criteria for research resources** in order to build the project sample then were:

- Publication prominence and reputation within each publication research sector. Publication research sectors are categorized as follows:
 - Museums Studies Specific Publications
 - Social/Culture Trends Market Research Specific Publications
 - Arts & Business Specific Publications
- Organization prominence and reputation within each website research sector. Website research sectors are categorized as follows:
 - Museum Organization/Association Websites
 - Social/Cultural Trends (Leisure Activity) Websites
 - Top 5 Visited Museums in UK Websites

For thorough investigation of each research resource, a corresponding set of **research terms** was established and applied to each research sector.

- **Publication research sector research terms** include:
 - museum visitor studies
 - museum “dwell time” statistics
 - consumer behaviour and museums
 - museums and customer revenue
 - museums “trading income”
 - museum visitor sales
 - museums retail
 - museum commercial activity
 - museums market research
 - museums “cultural trends”
 - museums “social trends”

- **Website research sector research terms** include:
 - museum visitor studies
 - visitor “dwell time” statistics
 - museum “trading income”
 - museum “self-generated” income
 - museum visitor expenditure

2.3 Data analysis and presentation of the results

The results are presented by a technical report outlining the process of the data gathering, coding and analysis and the analytical report summarising the main findings of the research.

2.4 Project schedule

The project schedule was designed so that the project would be completed by the confirmed delivery date: 9:00 Monday October 16th. WBC chose to deviate from the proposed project schedule to accommodate the research process and ensure the delivery of accurate findings. Due to the use of necessary additional resources (beyond the proposed outlets), the secondary research on electronic resources was extended from the proposed 1.5 days to 2 days. Additional time was also dedicated to the analysis of information and report writing.

The Table below shows the original proposed schedule and the actual one.

Task	Days Necessary	Proposed Completion Date	Actual Completion Date
Secondary Research: Electronic Resources	1.5	October 9 – October 10	October 9 – October 11
Secondary Research: Industry Specific Publications (Hard Copies)	1.5	October 11 – October 12	October 11 – October 12
Analysis/Report Writing	1	October 13	October 13 – October 15

2.5 WBC Project team

The team involved in the implementation of the Project:

- Project Manager: Jennifer Shalamanov
- Project Consultants: Rachel Yapirchl, Shehzin Naik

2.6 Quality Control

The project manager had overall responsibility of the project on behalf of WBC and was the main point of contact with regards to this project. The project consultants took responsibility for managing and consulting their team when required.

In addition to this, Valeriya Karuk (managing director of WBC) performed the role of project quality controller in order to observe and monitor the content of the contract and the quality of the work.

3 Results and Analysis

3.1 ELECTRONIC RESOURCES: ONLINE JOURNALS

3.1.1 - Museums Studies Specific Publications

Both museums studies specific publications (1) *the Journal of Conservation and Museum Studies* and (2) *Museum and Society* were researched online, via the publications' websites, through applying the established publication research sector research terms (see 2.2 – Project Sample).

3.1.1.1 – Journal of Conservation and Museum Studies

All archives available through the *Journal of Conservation and Museums Studies* website were researched. The content available was dated May 1996, Vol. 1 – November 2002, Vol. 8.

As a museum industry oriented publication, the *Journal of Conservation and Museums Studies* was geared towards feature articles and offered no statistical information related to the research objective.

3.1.1.2 – Museum and Society

All available archives were researched – March 2003, Vol. 1:1 – July 2006, Vol. 4:2 through the *Museum and Society* publication website and no information pertinent to the study was found.

3.1.2 – Social/Cultural Trends Market Specific Publications

Both social/culture trends market specific publications (1) *Journal of Marketing Theory and Practice* and (2) *the Journal of Consumer Research* were accessed via the online database Proquest. The established publication research sector research terms were applied.

3.1.2.1 – Journal of Marketing Theory and Practice

Expanding the scope from the proposed research outlets, the *Journal of Marketing Theory and Practice* was researched with the goal of uncovering leisure activity, specifically, consumer behaviour and the arts.

While articles and reports documenting activity from marketing strategy in museums to business models in cultural institutions; none pertained to the specific research topic.

3.1.2.2 – Journal of Consumer Research

Information relating to the study topic was not found in *The Journal of Consumer Research*.

3.1.3 – Arts & Business Specific Publications

The Arts & Business publications selected for research (1) *International Journal of Arts Management* and (2) *the International Journal of Non-profit and Voluntary Sector Marketing* were accessed via the online database Proquest. The established publication research sector research terms were applied.

3.1.3.1 – *International Journal of Arts Management*

Despite providing extensive information, through reports and studies, documenting the business aspects of the museum industry; none relating to the research topic were found.

3.1.3.2 – *International Journal of Non-profit and Voluntary Sector Marketing*

The International Journal of Non-profit and Voluntary Sector Marketing provided business information on cultural institutions. No information relevant to the study was found.

3.2 – ELECTRONIC RESOURCES: ORGANIZATION/ASSOCIATION WEBSITES

3.2.1 – Museum Organization/Association Websites

All museums organizations and associations websites were researched using the website research sector research terms (see 2.2 Project Sample).

3.2.1.1 – *Museums Association*

3.2.1.2 – *Museums, Libraries and Archives Council (MLA)*

3.2.1.3 – *British Museums Association*

3.2.1.4 – *Department for Culture, Media and Sport (DCMS)*

3.2.1.5 – *Arts & Humanities Research Board*

3.2.1.6 – *Arts Council of England*

3.2.1.7 – *MORI Association*

While failing to provide accurate justification of the research objective: whether research has been conducted on the potential correlation between dwell time and the amount of visitor expenditure in museums, two MORI research studies (1) *Visitors to Museums and Galleries in the UK* and (2) *The Impact of Free Entry to Museums* offer that the issue has surfaced.

Stated in the Introduction to *Visitors to Museums and Galleries in the UK*, MORI identifies “how much time and money visitors spend in museums,” as a main objective of their study. While the objective is neither answered nor validated with statistical information in this study, it’s evident that the issue has been raised within the museum research community.

Also lacking statistical validation, the research objective is also mentioned in the MORI study, *The Impact of Free Entry to Museums*. Attempting to explore the potential ramifications of free entry to museums in the background section of the study, the MORI study authors ask the rhetorical question: “Would the money visitors save on entrance fees be spent in the shops and restaurants?” The question remained unanswered by the study, but it does prove that our research objective has at least been recognized by the museum community.

Tracking the effects of free admission, the MORI study examines changes in consumer behaviour and reports:

“Fifteen percent of respondents are more likely to buy a guidebook or hire an audio guide now that entry is free. Ten percent of respondents report that they tend to spend more in museum/gallery shops because entry is free. Eight percent

tend to spend more on food and drink in museum/gallery restaurants/cafes because entry is free.”

While the respondent percentage numbers regarding visitor expenditure aren't heavily substantial, they do represent an interest in the examination of visitor expenditures and the commercial interests of both customers and museum staff.

3.2.1.8 - Imperial War Museum- Corporate Plan: 2002-2006

3.2.1.9 - National Railway Museum and Springboard

The National Railway Museum and Springboard published a teacher's guide to the student activity trail. Although the published information lacks the necessary credibility to validate a correlation between museum visitor dwell time and visitor expenditure, the study does state:

“The “dwell time” at the NRM is now about 2 hours and 20 minutes, which is under the recommended 3 hours needed for a visit. Most spending is by visitors staying for over 3 hours. Statistics show that only 30% of visitors spent more than 3 hours at the NRM. 70% of secondary spending is by these 30% of visitors.”

3.2.1.9 – The National Maritime Museum

The National Maritime Museum is an example of how contributions to the economy can be maximized through the leisure and creative industries. Museums have financial interests to consider and trading income benefits the museum and customers.

“Benefiting the local economy by enhancing Greenwich as a visitor destination and increasing the typical visitor's dwell time within the local trading area of the WHS.”

3.2.2 – Social/Culture Trends (Leisure Activity) Websites

All museums organizations and associations websites were researched using the website research sector research terms (see 2.2 Project Sample). All are more general information providing websites. None offered information relevant to the study.

3.2.2.1 – ERSC Society Today

3.2.2.2 – SPRIG

3.2.2.3 – Leisure Consultancy

3.2.3 – Top 5 Visited Museums in UK Websites

All museums organizations and associations websites were researched using the website research sector research terms (see 2.2 Project Sample).

The information available through each of the museum websites was tailored to the audience as a potential museum customer. Information on exhibits and museum history was provided, as well as information on commercial planning.

After searching the different museum's websites, it is important to note their categorization of income and revenue. Customer expenditure is presented under self-generated income.

3.2.3.1 – British Museum

The British Museum website offers information on the economic aspects of the museum. Their income breakdown is presented and information on the museum's "self-generated" income can be found.

3.2.3.2 – National Gallery

3.2.3.3 – Tate Modern

3.2.3.4 – Natural History Museum

3.2.3.5 – Science Museum

3.3 INDUSTRY SPECIFIC PUBLICATIONS (HARD COPIES)

3.3.1 – Museums Studies Specific Publications

All museums studies specific publications were researched using the publication research sector research terms. None offered information relevant to the study.

Hard copies of both Museums Journal and Museums practiced were accessed at the Westminster Reference Library, the investigation yielded no relevant results. A more thorough investigation was the conducted via the online database Proquest. Nor did the archives available online produce relevant results.

3.3.1.1 – Museums Journal

3.3.1.2 – Museums Practice

3.3.2 – Arts & Business Specific Publications

All museums studies specific publications were researched using the publication research sector research terms. None offered information relevant to the study.

The selected arts & business specific publications are available at the British Library. Unfortunately, our research team did not have access to the publications being that they are located off-site.

The subject matter of each publication is potentially relevant to this study and further investigation can be arranged, if desired by the client.

3.3.2.1 – Thinking in the Knowledge Age, New Business Models for Museums and Other Cultural Institutions

3.3.2.2 – Marketing Learning in Arts, Culture and Heritage

3.3.3 – Social/Culture Trend Market Research Specific Publications

All museums studies specific publications were researched using the publication research sector research terms. None offered information relevant to the study.

3.3.3.1 – Cultural Trends

Cultural Trends Vol. 15, No. 1 (March 2006) and Vol. 15, No. 2-3 (June 2006) were studied.

3.3.3.2 – *Social Trends*

A hard copy of *Social Trends* was researched supplementing online research available via the UK national statistics website.

4 Conclusions

A qualitative analysis of all the secondary research has revealed the following salient trends:

- There are relatively few economic analysis of museums.
- Much of the market research that can be applicable to the correlation between museum visitor dwell time and visitor expenditure is found in economic records where inferences must be made.
- Museum market research is mainly focused on visitor demographics.
- Museum visitor customer satisfaction studies are a museum market research focus.
- Analysis of the developing social and economic issues, including: museums' commercial activities, the museum store and museum atmospherics in relation to visitor behaviour foreshadow increased future focus and investigation into topics like "the potential correlation between visitor dwell time and visitor expenditure in museums."
- Museum management is concerned with the amount of "dwell time" visitors spend in museums. That concern can be attributed to educational and commercial interests.
- Museum marketing strategies confirmed the notion that museum visitor dwell time is related to visitor expenditure, but it must be taken into account that these are projected strategies and no evidence confirms the success of their marketing plans.
- Research has shown an increasing interest in the balance between the social, educational and economic branches of cultural institutions, including museums.
- Research dedicated to commercial activity of museums is on a rise.

Contact Details

Quality Controller

Name: Ms. Valeriya Karuk

Mobile: +44 7952 751 796

Email: valeriya.karuk@wbc-uk.com

Alternative Email: vkarak@yahoo.com

Office Address

Westminster Business Consultants

Room C173

C/o University of Westminster

35 Marylebone Road

London NW1 5LS

Tel: +44 207 911 5875

Fax: +44 207 911 5878

Email: office@wbc-uk.com

Web: www.wbc-uk.com