

RE → MUSEUM
PRESENTS



CASE STUDIES IN INNOVATION

**AUDIENCE
DEVELOPMENT**

INTRODUCTION

In general, American art museums do not attract as many visitors as they desire, and nowhere near as many as their capacious buildings can easily accommodate. In addition, they have historically been better at attracting visitors from slower-growing segments than faster-growing segments of the U.S. population. Their sustainability requires that they become more relevant and attractive to more people.

RE MUSEUM + Art Bridges

It would not be an exaggeration to say that audience development is the skill most critical to the future success of American art museums. Yet museums lack field-tested research to guide them in this challenging work. Given the multitude of opinions on this question (including from those who assert that a focus on quantity will necessarily reduce the quality of museum visits), this is yet another reminder that these critical public institutions need more publicly available data and research if they are going to matter to more people and thrive.

In order to help the field consider, evaluate, and share work on these topics, Remuseum partnered with Art Bridges Foundation (a foundation that supports greater access and art-sharing among American art museums) in hosting a convening of museum leaders in late 2024 to discuss audience development, access, and marketing. Remuseum is now publishing information from this gathering as “Case Studies in Innovation” and has already published a first such report on Access. This report on Audience Development is the second, published to support museums in attracting the numerous and recurring visits they both need and deserve.

THE TROUBLE WITH MONOLITHIC DEFINITIONS

While a core goal of most museums, “audience development” can seem both obscure and monolithic. It can seem obscure because it can mean so many things: demographic diversification, revenue generation, community relevance and just about everything in between. It can seem monolithic because its critical importance can create the impression that a single approach to audience development might be the museum field’s “silver bullet” to address a multitude of challenges.

But there is no single approach to this complicated topic. We might wish for but cannot identify a simple “one size fits all” solution to impose on each museum. The solution, rather, can be found in the questions each museum asks itself, based on its own history, location, needs, mission, and willingness to change.

At our convening we reviewed an important research paper by Dr. Francie Ostrower, a scholar (at the University of Texas/Austin) on public participation in the arts.

The paper, summarizing research supported by the Wallace Foundation, is called “In Search of the Magic Bullet: Results from the Building Audiences for Sustainability Initiative¹,” and its title mirrors its summary:

There is no magic bullet for arts organizations looking to build their audiences while also increasing revenue. While it’s possible to engage both new and current audiences using a variety of strategies, successful audience building may not always happen on the organization’s desired terms. It also might not bring the hoped-for financial gains, at least not right away.

On the surface, Ostrower’s assessment that these efforts rarely result in producing new and more deeply engaged and monetized audiences for organization might feel discouraging.

A deeper reading suggests that the problem may lie not in the results but the original goals that organizations set out to accomplish.

Importantly, Ostrower observes “[t]here is a tension built into their audience-building approach. Specifically, can the organization build target audiences for what they want to present the way they want to present it? Or does the organization itself need to change in order to attract audiences?”

¹ <https://wallacefoundation.org/sites/default/files/2024-02/in-search-of-the-magic-bullet-results-form-building-audiences-for-sustainability-initiative.pdf>

THE COURAGE TO ASK QUESTIONS

Among Ostrower's central conclusions is simply that before launching a slate of new tactics to address audience, organizations must first stop and evaluate what they are trying to achieve, with whom, why, and to what specific outcomes. She observes that many cultural institutions continue to operate with a "build it and they will come" mentality, expecting that audience expansion efforts will simply convince new audiences in higher volumes to consume their organization's existing offerings. Organizations also may assume that once new visitors are attracted, they will automatically move through a process of increasing attachment and support, becoming loyal members/subscribers and eventually donors.

Instead of jumping straight to solutions, the better approach to audience development requires each museum to ask more questions, and then to remain increasingly open to the responses it hears.

For example, a museum may begin simply by asking itself what it means by "audience"?

Is it:

People who already consume our work?

New people who have never consumed our work?

Younger people? More ethnically diverse people? More geographically diverse people? More economically diverse people?

More locals? More tourists?

People who are currently uninterested in what we do?

And then, what do we mean by “expanded” or “developed”?

Is it:

- Adding more people through the doors?
- Increasing the frequency of people already coming?
- Increasing visitor commitment to the museum through membership?
- Growing the pool of prospective donors?
- Changing the racial/ethnic/demographic mix of the people who visit?

And importantly, what are the results we seek from “audience development”?

Are we seeking to:

- Gain a direct financial impact from earned or contributed revenue?
- Improve the ability to compete for contributed revenue?
- Improve our brand reputation locally, nationally, globally?
- Better serve a component of our mission or better represent our values?

Each question will require deep and honest engagement with museum leaders, boards, staff, existing audiences and desired audiences and, as Ostrower suggests, must be met with willingness to hear the answers. And then comes the hard work: How willing and able is the museum to respond to what is heard? How interested is the museum in changing its behavior to achieve its stated goals? How open is the museum to adjusting its target outcomes based on the feedback it receives?

This report starts with the baseline, explaining who is currently visiting art museums and how that audience differs from the American average. Then it shares case studies from two museums that asked itself some of those questions, and then acted on the answers.

WHAT AUDIENCES HAVE MUSEUMS DEVELOPED?

Audience development requires understanding what audience a museum has already developed. Art Bridges Foundation awards financial support to over 80 American art museums to help them better understand their visitors. Art Bridges support allows these museums to participate in COVES (the Collaboration for Ongoing Visitor Experience Studies), a visitor-research project developed through a series of IMLS grants and housed at Museum of Science, Boston. COVES enables over 120 science, natural history, children's, and art museums to understand and improve the visitor experience through systematic data collection standardized across sites. Museums participating in COVES are able to compare to themselves, peer cohorts, and the nationwide aggregate and make evidence-based decisions through site-specific dashboards as well as publicly available reporting [found here](#). Art museums funded by Art Bridges are supported in their COVES experience by the [Center for Audience Research & Evaluation](#) at Crystal Bridges Museum of American Art. As a museum also participating in COVES, Juli Goss, Chief Strategy Officer of Crystal Bridges, presented and shared her institution's COVES reporting with convening participants, which included the following aggregate trends on all art museums participating in COVES.²

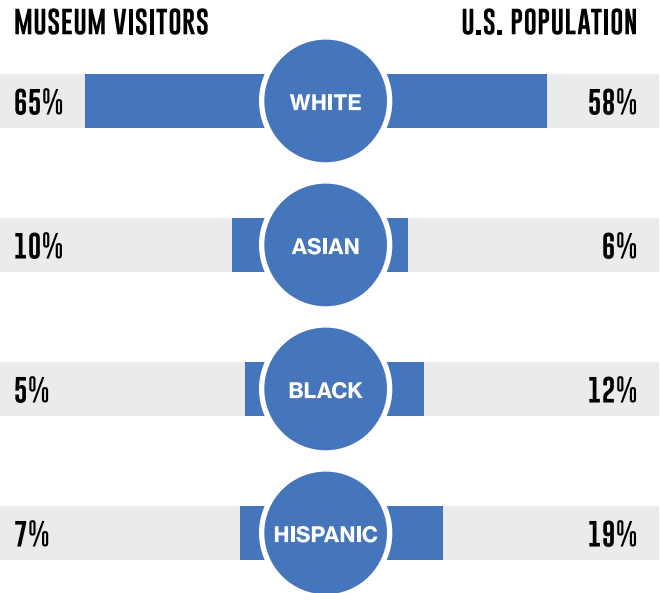


² The COVES Museums dataset includes 50 art museums across the U.S., as of 2023. All museums participating in COVES use the same instrument and methods, allowing for a valid comparison. Data on the general population comes from 2020-2023 census data accessed from the U.S. Census Bureau website for age, race and ethnicity, education, and income. COVES questions mirror the census to allow for comparison.

RACE

In terms of racial majorities/minorities, art museum visitation may not be as far from reflecting the national census as some believe, while there are disparities in individual races. White visitation among COVES Museums is 65% versus national representation at 58% of the U.S. population. Visitors who identify as Black/African American and Hispanic/Latinx underrepresent their national averages (5% versus 12% and 7% versus 19%, respectively) while visitors who identify as Asian or Asian American overrepresent their national averages (10% versus 6%).

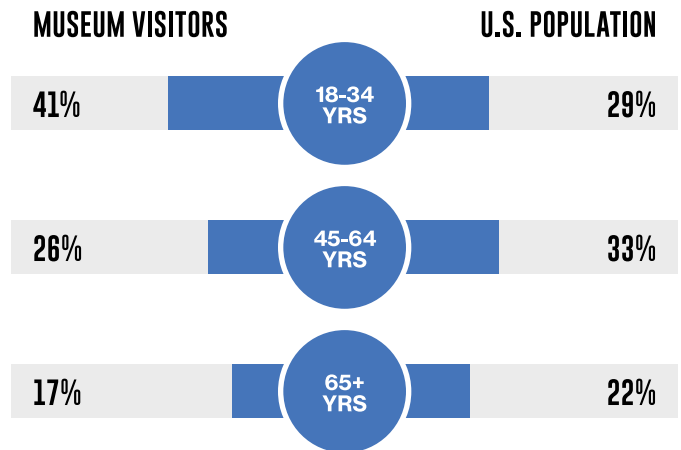
Almost no community looks exactly like the nation. Each museum needs to look at local/regional demographics to identify any gaps between its current audience and the community it serves.



AGE

Contrary to assumptions that art museums attract disproportionately older audiences (and have adopted practices, like open hours that conflict with working hours, that better serve a retirement-age population), COVES Museums attract a higher percentage of young adults compared to their role in the population. 41% of visitors to COVES Museums are aged 18-34 while they represent only 29% of the population. Meanwhile, visitors over 45 are underrepresented against their overall population (43% versus 55%); this underrepresentation holds true for both visitors aged 45-64 and visitors aged 65+.

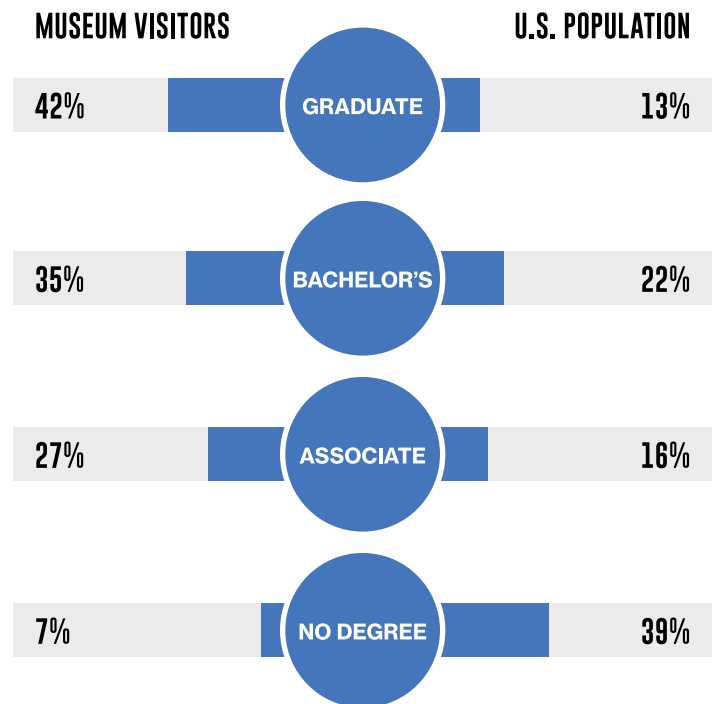
E.A. Michelson Philanthropy looked at these data and supported a multi-year program to combat ageism in art museums.³ Noting that by 2035 there will be more adults over 65 than under 18 in the U.S., Michelson made grants to over 25 major art museums to support them in better developing their audience among Americans aged 55+.



³ <https://www.theartnewspaper.com/2024/01/12/op-ed-museums-must-address-ageism>

EDUCATION LEVELS

Education levels are the category where museum visitors least reflect the overall population. 42% of COVES Museum visitors have a graduate degree versus only 13% of the U.S. population; another 35% have bachelor's degree versus only 22% of the U.S. population. In terms of education levels, that means 77% of museum visitors (versus only 35% of the U.S. population) have college and/or graduate degrees. Americans with some college (or an Associate degree) present a similar gap (16% versus 27%). But the starkest gap in education levels represented in museum visitors is for those who have only completed high school or less: A population that represents 39% of the U.S. population represents only 7% of visitors to COVES Museums. Museums have a long way to go in welcoming citizens who don't have the same degree of education as most of the people who work in them.

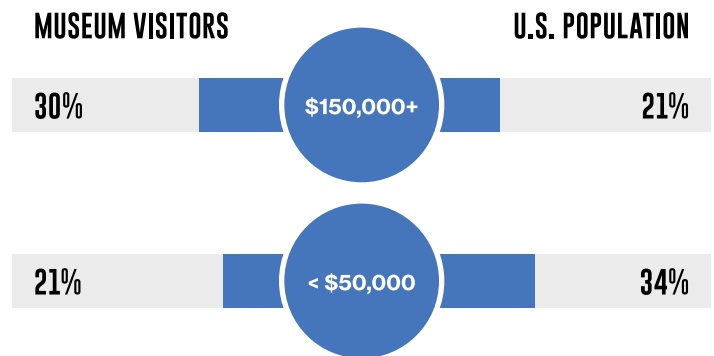


The fact that less-educated households do not visit museums may reflect biases that are hard for museum workers to shed, since it may be trait most likely to connect them with each other (and with their boards). Remuseum's own informal research confirms the ways that museums reinforce education-based assumptions. In August 2024 we took the website content describing current exhibitions from 200 major American museums (viewing this as the content a potential visitor could most easily find to determine whether an exhibition would be of interest) and ran that content through a number of reading level filters. The average museum content was written at the reading level of college graduates on their way to graduate school, and only about 7% of the more than 800 exhibition descriptions were written at a high-school level. Given that the average American reads at about the 7th-8th grade level, museums might do well to match their investment in providing content in alternative languages (like Spanish) with an investment in providing English content that the average American can easily understand.

HOUSEHOLD INCOME

As might be expected, museums exhibit an overrepresentation of higher-income households, but not nearly as stark as their overrepresentation of higher-education households. 30% of visitors to COVES Museums live in households with income of \$150,000+ versus 21% of the population. Museums attract middle-class households at levels very close to their national averages. At household income levels below \$50,000, the numbers diverge again: COVES Museums draw 21% of their visitors from these households, which represent 34% of the national population.

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RIGHT FOR THEIR PLACE

Knowing what audience your museum currently attracts does not, of course, answer the question of what an individual museum's audience-development strategy should be. Should you seek to grow the audience you already have? Should you seek to attract new visitors who are "adjacent" to the audience you already have? Should you seek to attract visitors who have never come to your museum? The scope of these questions confirms that there can be no one strategy for all museums. At our convening, two museums – the Art Gallery of Ontario (AGO) in Toronto and the Peabody Essex Museum in Salem, Massachusetts – shared case studies in how they had developed strategies that were right for their institution and, even more, right for their place.



HOW THE A.G.O. HAS CHANGED WITH ITS CHANGING COMMUNITY



The **Art Gallery of Ontario** (AGO) is one of Canada’s largest art museums, located in the country’s largest and fastest-growing city. It adds several hundred thousand new citizens each year, and the percentage of Toronto’s population who identify as non-white (a.k.a. a “visible minority group”, to use the Canadian census term) increased from 13.6% in 1981⁴ to nearly 56% in 2021⁵, making it one of the most diverse cities in the world.

As the AGO considered how to drive both relevance and sustainability, leaning into the growth and demographic shifts of its hometown was both opportunistic and essential.

The work started with its exhibition program. Without advertising any changes, the AGO began exhibiting more art made by artists who reflected its community. In the last eight years, half of their exhibitions featured women artists and half of their shows featured artists from visible minority groups. And the community started noticing.

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Director Stephan Jost notes two other facets of this reorientation.

The first is a belief in pluralism, or the idea “that different people will come to different conclusions and to respect people who disagree with them”. Diversifying the art a museum collects and presents means diversifying, not narrowing, the perspectives the art can embrace. The museum can’t assume it knows what a diverse public values or thinks.

⁴ https://web.archive.org/web/20120310180425/http://www.ceris.metropolis.net/wp-content/uploads/pdf/research_publication/working_papers/wp6.pdf

⁵ <https://www.toronto.ca/wp-content/uploads/2017/10/9793-2011-NHS-Backgrounder-Immigration-Citizenship-Place-of-Birth-Ethnicity-Visible-Minorities-Religion-and-Aboriginal-Peoples-.pdf>

This approach was reaffirmed by audience research the AGO conducted, which helped it identify demographic segments to connect with. From “Suburban Multi-Generationals” to “Diverse Urban Fringers” and “Cultured Matures”, the new segments help the museum imagine how to cater its offerings and messages to each group. It also learned not to assume that any particular profile aligned with any set of cultural or political beliefs; young multicultural immigrant families were as likely to be politically conservative as liberal.

The second is working hard to attract young people, especially important in a city where a quarter of the population is younger than 25⁶. As Jost says, “We make our primary cultural choices between the ages of 16 and 25. I still listen to the music that meant something to me when I was that age. Whoever gets that grip on people, wins.”

Many of the nearly 100,000 annual pass holders under 25 began referring to themselves as “members” – evidence that they were rewarding the AGO with the kind of loyalty and support they felt from the museum.

While the exhibition program may attract a younger audience to visit, a museum still needs to find the best ways to turn that visit into a relationship. For the AGO, that meant reducing various discounts to their admission price and offering a free “annual pass” for anyone under 25. To their surprise, many of the nearly 100,000 annual pass holders under 25 began referring to themselves as “members” – evidence that they were rewarding the AGO with the kind of loyalty and support they felt from the museum.

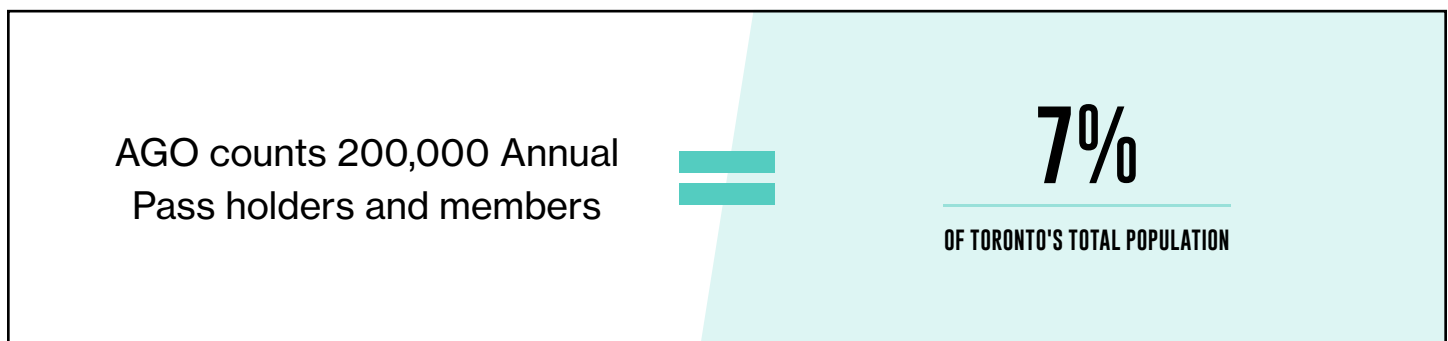
Suddenly, what the AGO considered a category of admission became a category of membership. As Jost says, “They can have a strong institutional affiliation even if they’re not paying. What they have given us is their hand.”

⁶ <https://www.toronto.ca/wp-content/uploads/2022/04/9654-City-Planning-2021-Census-Backgrounder-Age-Sex-Gender-DwellingType.pdf>

ADMISSIONS, MEMBERSHIP AND FUNDRAISING

Expanding efforts to turn visitors into partners, the AGO also launched a C\$40 Annual Pass, a one-time fee that allowed repeat visits all year long. Priced only C\$10 more than a single-visit admission fee of C\$30, this pricing innovation led many visitors to pay a small amount more in exchange for unlimited access. The museum also stopped charging for special exhibitions and reduced miscellaneous discount or special ticket options, streamlining into a simple and easy to understand admissions approach that infused value in the Annual Pass concept.

Eventually, the AGO made the Annual Pass its first level of membership. The museum has only seen about 2% of pre-existing members downshift to the Annual Pass, proving that member cannibalization is not a significant threat and suggesting that this new high-access entry point is generating incremental volume and value for the museum.



AGO now counts nearly 200,000 Annual Pass holders and members, about 7% of Toronto's total population. By turning a transaction into a relationship (with generous support from forward-thinking donors), the AGO ingrains the museum experience – and the benefits of membership – as early as possible in a visitor's relationship with the museum. As with other investments in audience development, this one has produced other benefits. For one, young members are often the gateway for older, extended family members to visit, helping further expand the AGO's audience. In addition, a database of nearly 200,000 annual pass holders offer the museum its own marketing and communications platform, one that allows it to manage a life-cycle of engagement while saving money on paid advertising.

If the audience itself is seen as a critical source of ticket sales, "audience development" can seem equivalent to an increase in earned income. The AGO's example has instead generated an increase in contributed revenue, whether from the donors who generously support the free annual pass for Ontarians under 25 or from the new audiences themselves. Given that Toronto is home to many citizens of African/Caribbean descent, the museum solicited contributions from them to acquire an important 19th Century archive of Caribbean photographs and then created a donor group to expand that collection. This group is now the largest such group at the AGO.

The lessons?

Don't assume (1) that donors won't help you invest in new audiences and (2) don't assume that diverse audiences can't also be donors themselves.

HIGH

THE HIGH MUSEUM OF ART



A similar example of audience development in a fast-growing city can be found at Atlanta's **High Museum of Art** (which did not participate in our convening). In Atlanta almost 60% of the population is Black, indigenous or other people of color (BIPOC), but when Director Rand Suffolk arrived at the High in 2015 only 15% of its visitors were BIPOC. By 2023, 57% of the High's visitors were BIPOC.⁷

INCREASE OF BIPOC VISITORS FROM 2015 TO 2023

15% → 57%

As with the AGO, the primary driver for this change was a shift in both the art presented by the museum and the programming that brings art to life. The High used exhibitions and events in tandem, reflecting its community and building a stronger sense of community within its walls. At the same times, the High shifted its messaging. While narrowing its target market very specifically to the city of Atlanta, it shifted its messaging, from trumpeting its latest blockbuster to marketing a multiplicity of exhibitions and marketing the museums as a destination for all Atlantans.⁸

⁷ <https://www.nytimes.com/2024/06/03/arts/design/museums-strategy-increase-attendance.html>

⁸ <https://observer.com/2024/07/arts-interview-high-museum-of-art-director-rand-suffolk/>

WHAT IT TAKES TO BE RIGHT FOR YOUR PLACE

The AGO and the High are finding success by leaning into community. Learning from their examples would not mean copying their practices, but instead copying their orientation and a key question for museum leaders and boards:

Does your museum reflect your community?

In addressing that question, each museum will have to choose whether to apply this question to its staffing, collection, exhibitions, events, board, facilities, budget, or PR. Making change has to start with the question. The answers can lead museums in many different directions.

For a long time, many museums have pursued national and international reputations for their work. Some have found that succeeding at that goal leaves them without a recurring and sustainable audience in their own hometowns. It may also impact their fundraising, if a new generation of donors cares more about community impact than international respect.

It is important for boards and donors to understand the importance of this shift, since in many cases they themselves may have been attracted to supporting a museum that was more focused on its reputation outside the community than its relevance within it, or they may have felt that local support (like their own) would follow as the museum's reputation grew.⁹ But just as these trustees have already approved a dramatic shift from museum mission statements focused on objects to mission statements focused on the public¹⁰, they now need to support the rebalancing (between reputation and relevance, between quality and quantity) that results from that shift. One convening participant cited the importance of a supportive grande dame who attended a successful gala and accomplished a lot with a single statement to her peers: "I didn't know anyone there – and that was a great thing!"

⁹ The High Museum's Rand Suffolk "said of the older campaigns, which were driven by touting prestige. 'It used to be, "We're the leading art museum in the Southeast U.S." But we don't want to lead with that now.' By contrast, the current messaging centers on the line, 'My place too,' which Suffolk and his team think emphasizes the idea of belonging." See footnote #7.

¹⁰ In 2024, Remuseum analyzed the mission statements of Association of Art Museum Directors (AAMD) member museums. We found that nearly 90% of museums define their mission in terms of serving the public, whereas only 11% still center objects at the heart of their mission. https://remuseum.org/wp-content/uploads/2024/05/Remuseum-Museum-Missions-and-Transparency_REPORT.pdf

P | E | M

PEABODY ESSEX MUSEUM

Capturing All the Audience
You Can



The **Peabody Essex Museum** (PEM) offers another approach to audience development that is right for its place, as it has gained comfort with embracing all motivations for people to visit its storied hometown of Salem, MA.

Founded in 1799 during the age of Enlightenment, today's PEM is a combination of two previously independent museums that came together twenty-five years ago as one larger organization. The museum has leveraged its collection and talent to create a global reputation but has not always focused on the local community or even the tourists attracted to one of the area's most infamous themes: the Salem witch trials.

In considering how to facilitate growth, PEM's leadership team identified a gap in their marketing investment between September and November, the period when Salem welcomes an influx of over 1.3 million "witch trial" visitors. In the past, PEM had assumed that such tourists would not be interested in its offerings, even though it held a rich collection of material relating to the witch trials and Salem's early history.

The result is a substantial increase in seasonal attendance, as PEM now seeks to capture an increasing share of the visitors already walking near the museum's front door.

Recognizing that its own biases might have led it to ignore an easy target for growth, PEM began using its reputation for excellence to attract tourists who were already in Salem and were looking for material and an experience they could trust. "We have chosen to do changing exhibitions and programming that authentically relate to the spirit of the season – pardon the pun – while also fulfilling our goal to create thoughtful, well researched exhibition experiences," said Lynda Roscoe Hartigan, PEM's Rose-Marie and Eijk van Otterloo Executive Director and CEO. The result is a substantial increase in seasonal attendance, as PEM now seeks to capture an increasing share of the visitors already walking near the museum's front door.

But increased tourist traffic isn't the only benefit. The museum recognized that previous decisions to avoid local history (like the witch trials) also likely alienated the local community. And that has spurred them to become a much stronger partner and resource for their most immediate audience.

Over this period PEM's leadership has also begun to reposition its collection as not simply a set of important objects, but as materials that tell a collection of human stories. As the museum's mission has evolved to share more stories with more people, it has taken time to better understand the motivations of its prospective visitors.

Some visitors are motivated by the presence of art, others are motivated by the learning aspect of being in a museum environment and yet others visit simply for the social interaction a cultural space provides.

PEM has made a considerable investment in visitor data, including a combination of quantitative and qualitative research to arrive at personas to help the museum identify visitor interests and motivations to engage with the museum. PEM ultimately arrived at a set of psychographic personas anchored on visitor motivations. While some visitors are motivated by the presence of art, others are motivated by the learning aspect of being in a museum environment and yet others visit simply for the social interaction a cultural space provides.

By digging into these motivations, PEM has been able to target its branding, marketing, admission and offerings to offer different people different pathways into the museum, expanding audience in a way that is right for the people it seeks to attract. This process of collecting data, evaluating its value and insights and refining museum operations is an approach PEM plans to continue and is a process that any museum can adopt to support strategic methods to audience growth.

CONCLUSION

Museums seeking to expand their audiences need more data than most museums have. But they also need something even harder to obtain: the desire to change.

There are countless reasons that any museum has developed its existing audience, and finding new audiences does not mean simply offering something “diverse” and wondering why new visitors did not return. Francie Ostrower’s report identified the ways that organizational change, and its lack, may be the reason that more arts organizations have sought to develop sustainable new audiences but have not gained them.

The museums that joined our convening all rely on data but also commit to using it, trying new things, testing them, and then applying that work to their next round of investing in the new audiences that almost all museums need to thrive. And they know that work is never done.

Aside from hinting at the Peabody Essex’s use of psychographic profiles to refine its marketing campaigns, this report has not addressed the ways that museums need to communicate differently to new audiences they hope to attract. For that reason, marketing will be the subject of our next report in the “Case Studies in Innovation” series.