Illuminating your visitors

Audience Research for The Alamo

June 2018

morris hargreaves mcintyre

Who we are

A strategic research consultancy

Immersed in the cultural and heritage sectors

What we are going to cover today

- Profile of visitors
- Audience segmentation
- Needs, motivations and expectations of visitors
- Onsite behavior, engagement, needs and wants
- Depth of engagement with content and interpretation
- Response to experience

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Methods

- 249 exit surveys
- 104 Vox Pops across five locations
- 381 observations in three areas

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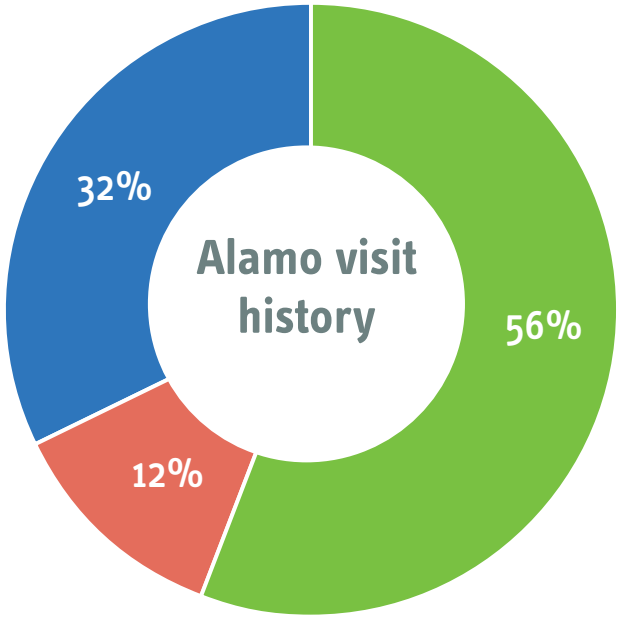
Diverse demographic profile

Over half of visits were made by first-timers



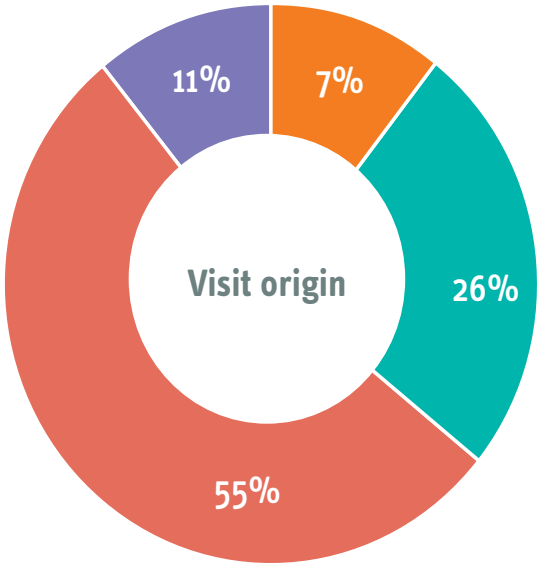
First time
Current
Lapsed

[Base: 249]

But together, two-fifths of visits were made by **current and lapsed** visitors.

This means there was a significant contingent **familiar with the offer**.

The majority of visits were from out of state



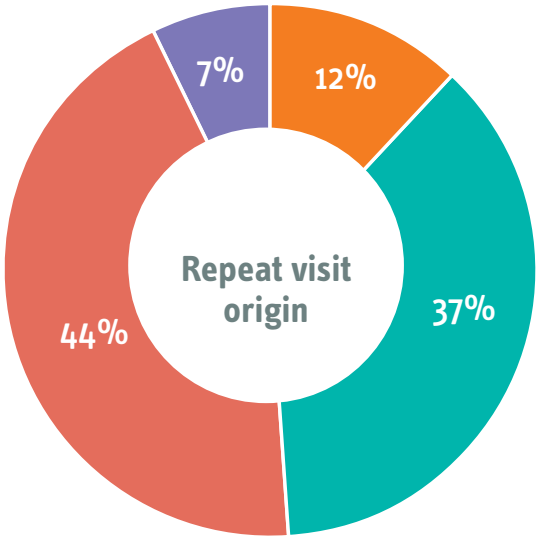
San Antonio
Rest of Texas
Rest of US
Overseas

[Base: 249]

A minority of visits were local.

The H2R research reports that 96% of San Antonio Overall had visited The Alamo previously.

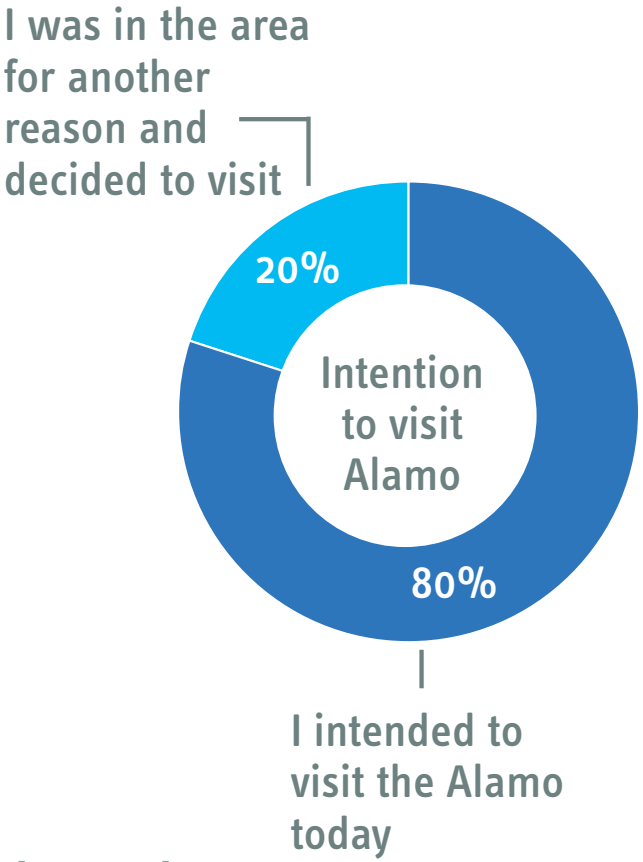
And few locals made repeat visits



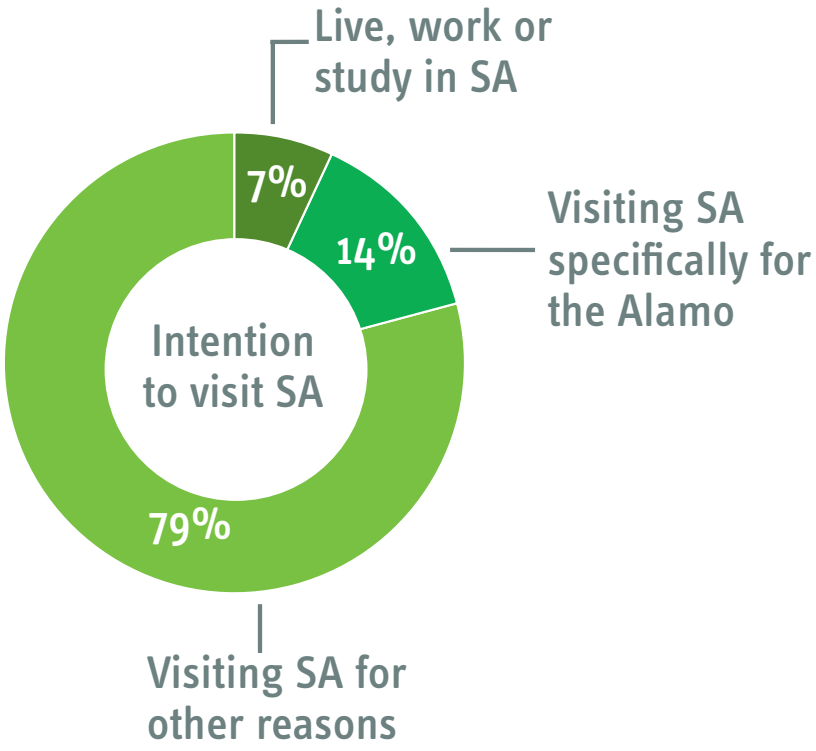
San Antonio
Rest of Texas
Rest of US
Overseas

[Base: 110]

Those who made a **repeat** visit were most likely to originate from **out of state** – likely lapsed visitors returning to the area.



[Base 249]

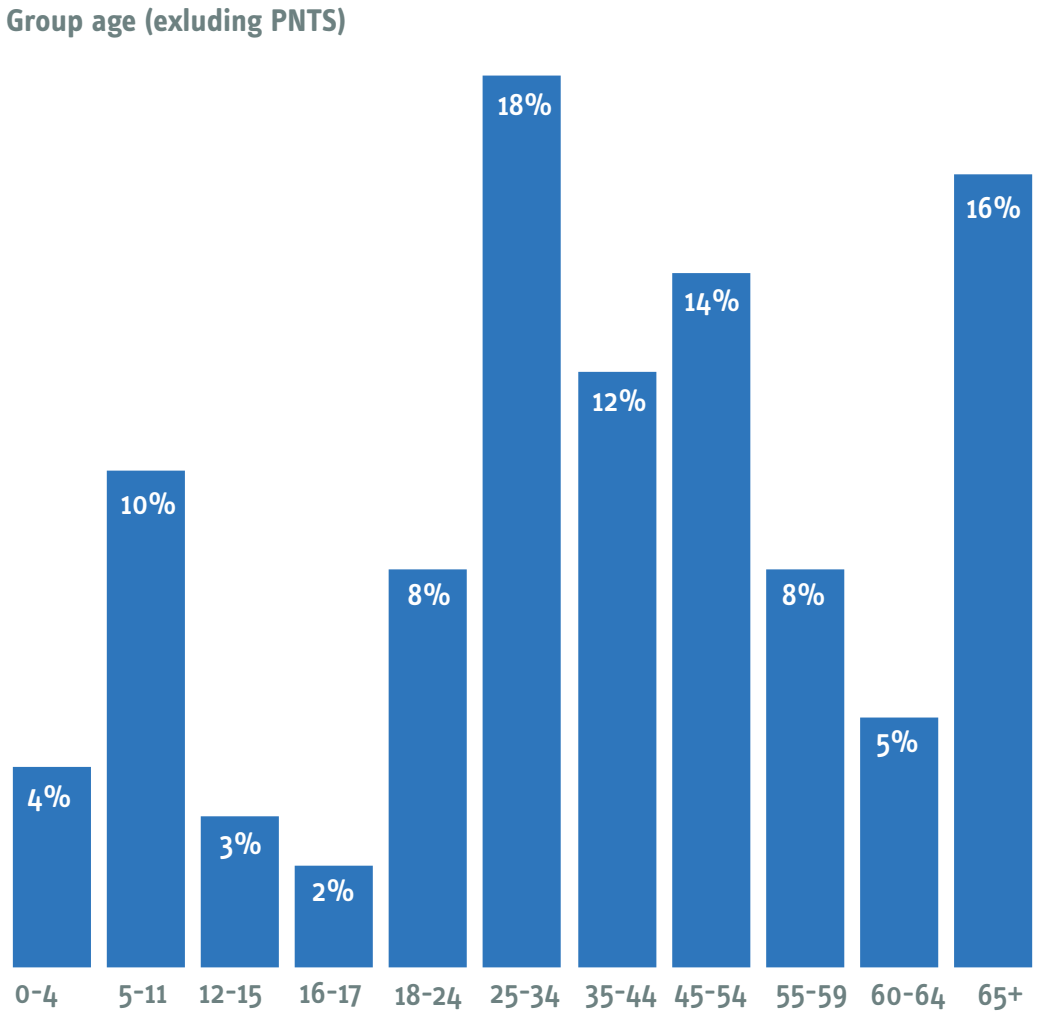


[Base 244]

The Alamo had a **high level of intentional** visits, but was **not** the main attractor for most of those visiting San Antonio.

‘We happen to be in San Antonio and we had a little time to kill. It is a great historical place and we are staying two blocks away’

Diverse range of ages



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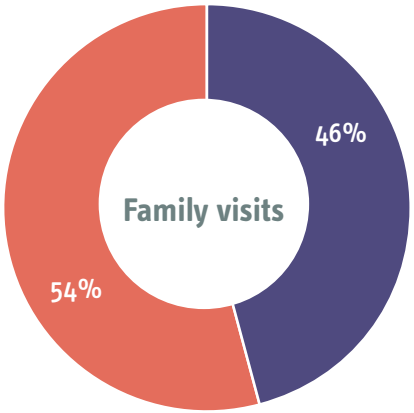
The diverse age range of those visiting the Alamo is a testament to it's **all-round popularity**.

High level of family visits



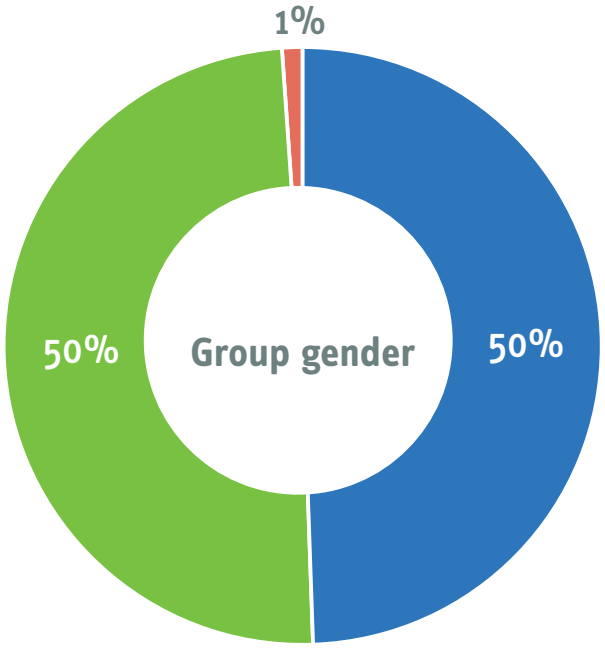
Family
Non-family

[Base: 776]

The Alamo is clearly a family destination.

Successful family engagement requires tailored information and activity provision.

Even gender split



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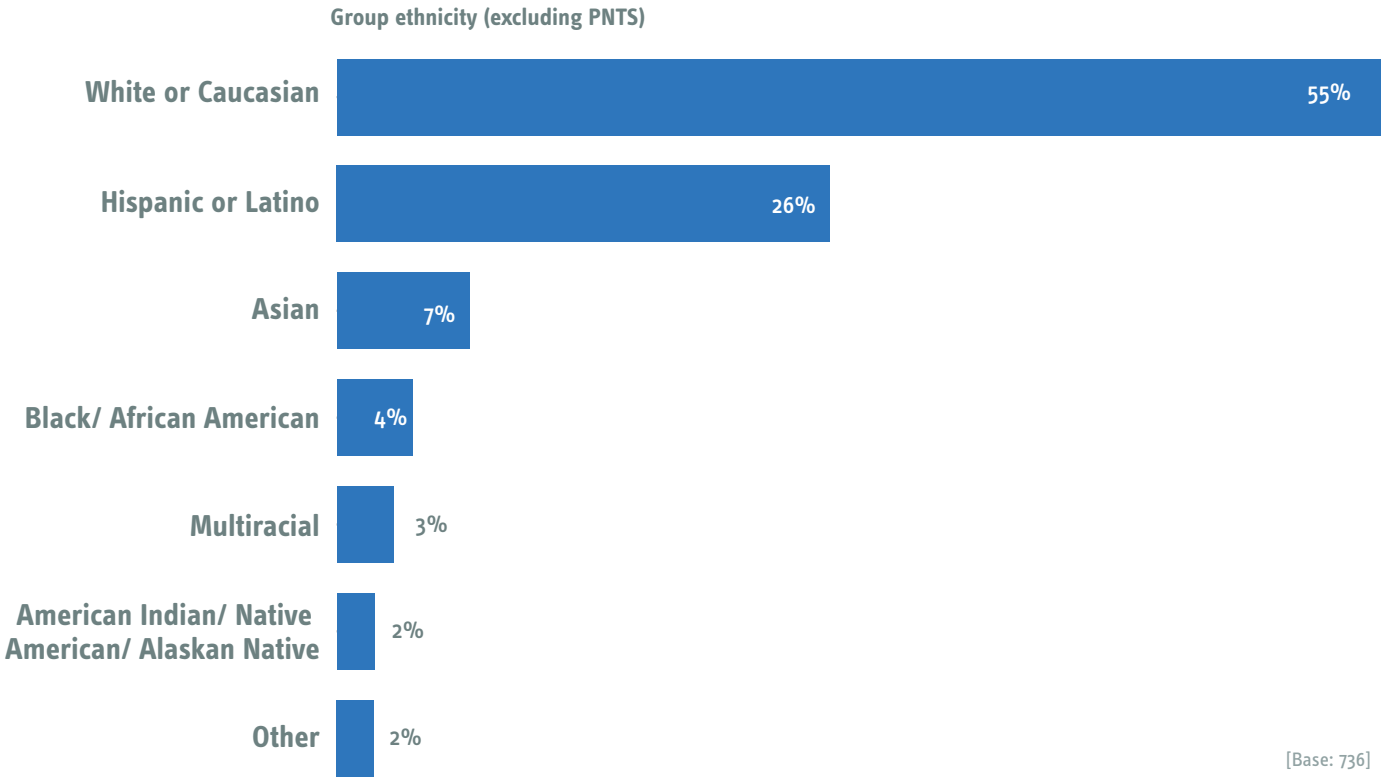
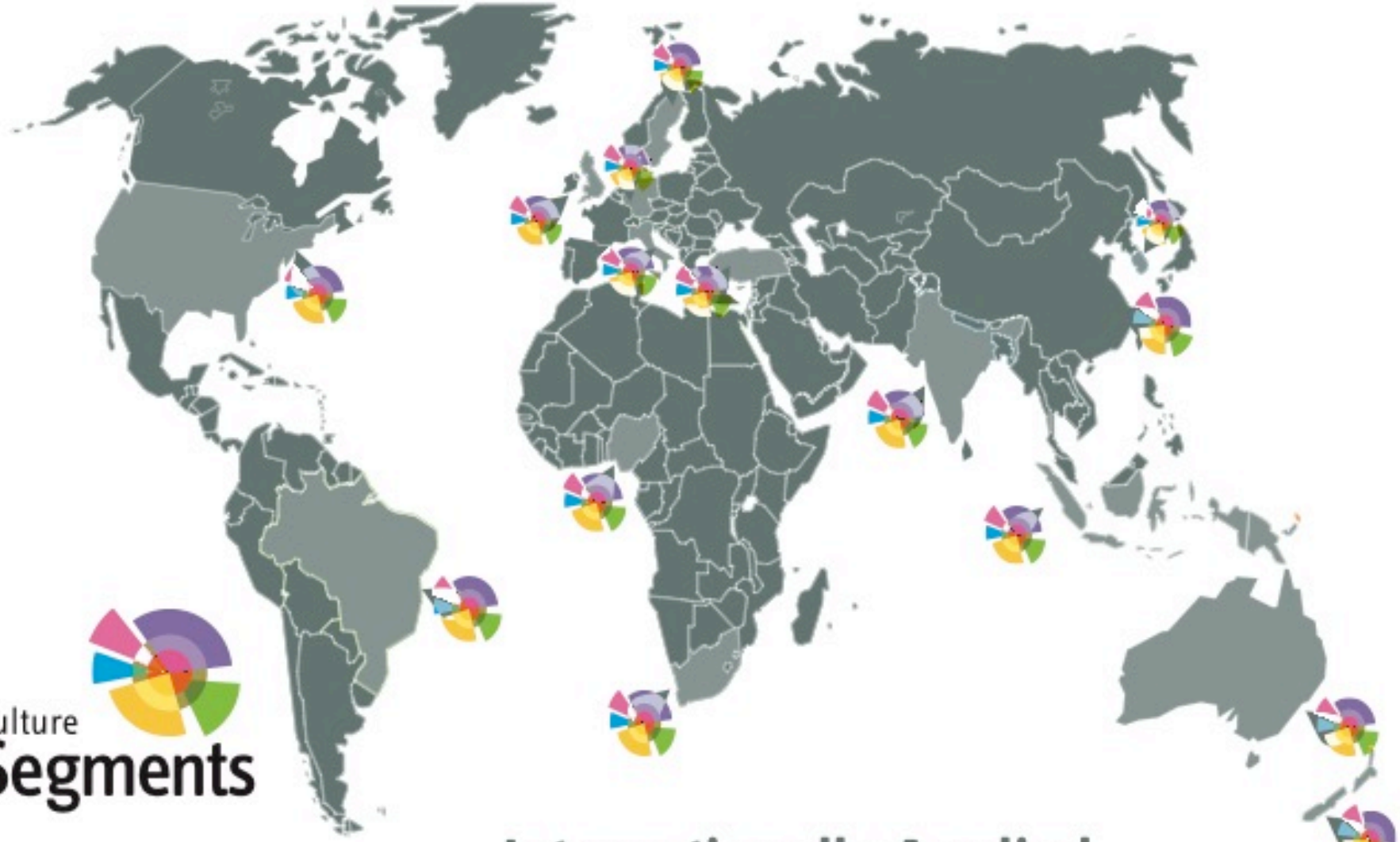
Typically, military sites have a **gender bias**, attracting a higher proportion of **males** than females.

Strong Hispanic/Latino presence



What is Culture Segments?



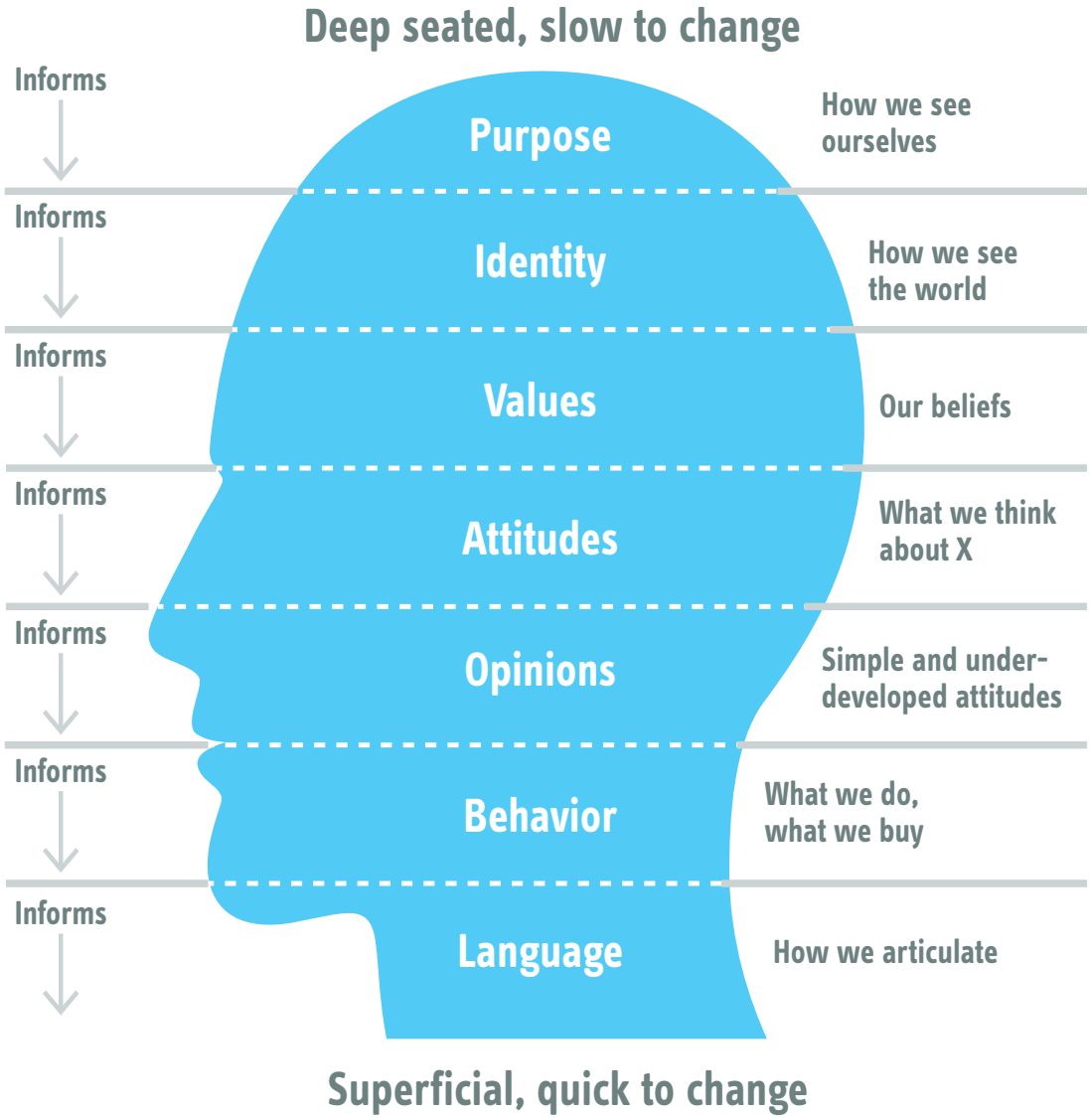
Culture
Segments

Audience
Atlas

Internationally Applied

Australia	China	Indonesia	New Zealand	Turkey
Brazil	Germany	Israel	Oslo	UK
Chicago	India	New York	South Korea	

What is Culture Segments?



Evolution of segmentation

VALUES

ATTITUDES

LIFESTYLES

GEOGRAPHY

VISITING BEHAVIOR

DEMOGRAPHICS

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ESSENCE

Discerning
Confident
Independent
Arts-essential

EXPRESSION

Generous
Community
Nurturing
Committed

STIMULATION

Active
Experimental
Social
Ideas

AFFIRMATION

Self-identity
Improvement
Considered and diligent
Time well spent

ENRICHMENT

Traditional
History and heritage
Nostalgia
Learning

PERSPECTIVE

Self-sufficient
Focused
Reflective
Fulfilled

RELEASE

Busy
Prioritizing
Ambitious
Escape

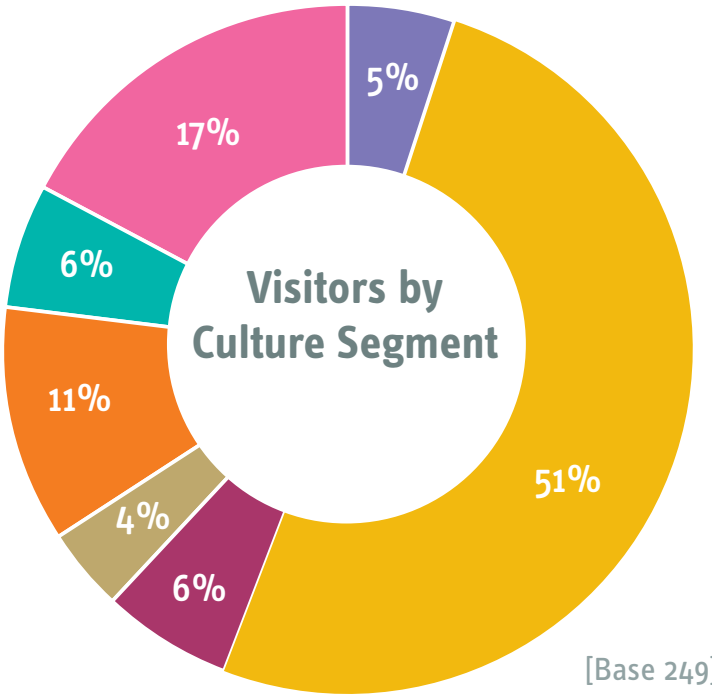
ENTERTAINMENT

Mainstream
Popularist
Leisure
Fun

Expression dominate

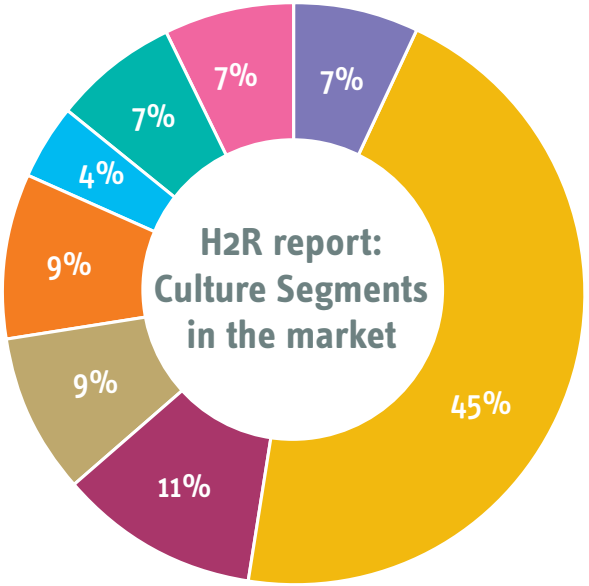
Expression was largest segment at The Alamo

With Entertainment and Stimulation making a significant proportion of visits

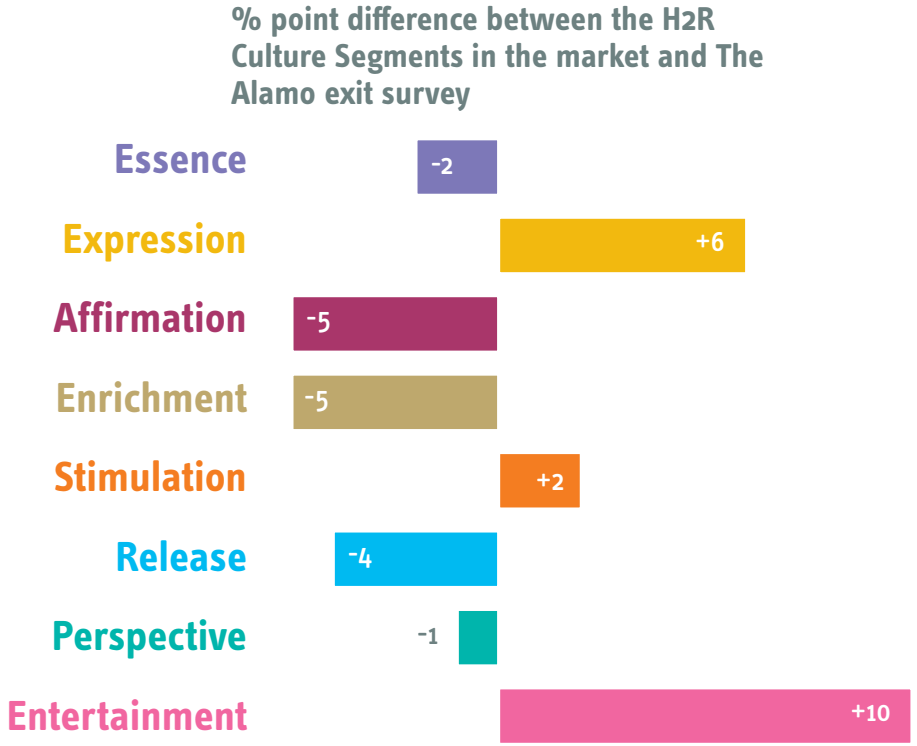


[Base 249]

Expression largest segment in H2R total market



[Base 2,068]



[Base 249, 2,068]

45% of population survey respondents were Expression. This segment had the **highest opinion** of the Alamo (90%) and **highest intent to visit** (60%).

Who are they?

Expression, Entertainment, Stimulation

Expression

Community, Nurturing, Generous, Committed

Open and **full of enthusiasm** with varied and **eclectic** tastes. They enjoy activities that help them **connect with and share experiences** with others. They like to be sure that **everyone is welcome to join in and enjoy** things, and as such **put a high price on inclusivity**.

Entertainment

Mainstream, Popularist, Leisure, Fun

Tend to see **culture as peripheral**. Their occasional visits are likely to be for **mainstream events or days out**. Leisure time is for **fun and escapism**, not intellectual stretch. If they do attend, it will be **socially motivated** but their engagement is typically among the lowest of all segments.

Stimulation

Active, Experimental, Ideas, Social

An active group who **love adventure** and live for the moment. They seek out **new experiences** to live a varied life and **keep ahead of the curve**. They are all about **big ideas** and are looking for something **'out of the ordinary'**. But they also attend cultural events for the **social experience.**

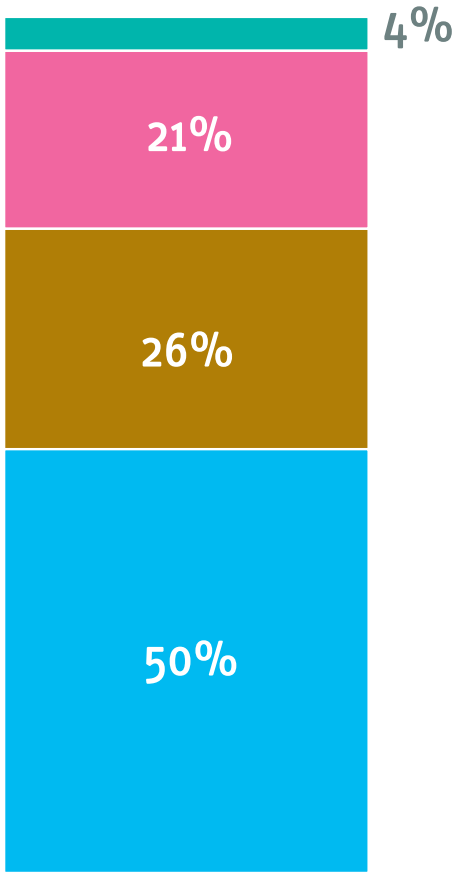
Visitors seek a good day out at a historic attraction

What drives people to visit historic sites?

Hierarchy of motivation

Visitors who see venue as a...	Have this driver...	And they seek this from a visit
Church	Spiritual	Creative stimulation and quiet contemplation, a place to escape and recharge, food for the soul.
Spa	Emotional	See fascinating objects in an inspiring setting. Ambience, deep sensory & intellectual experience.
Archive	Intellectual	Develop own interest and knowledge, journey of discovery, find out new things.
Attraction	Social	Enjoyable place to spend time, good facilities and services, welcoming staff.

Half of visits were socially driven



Spiritual

Emotional

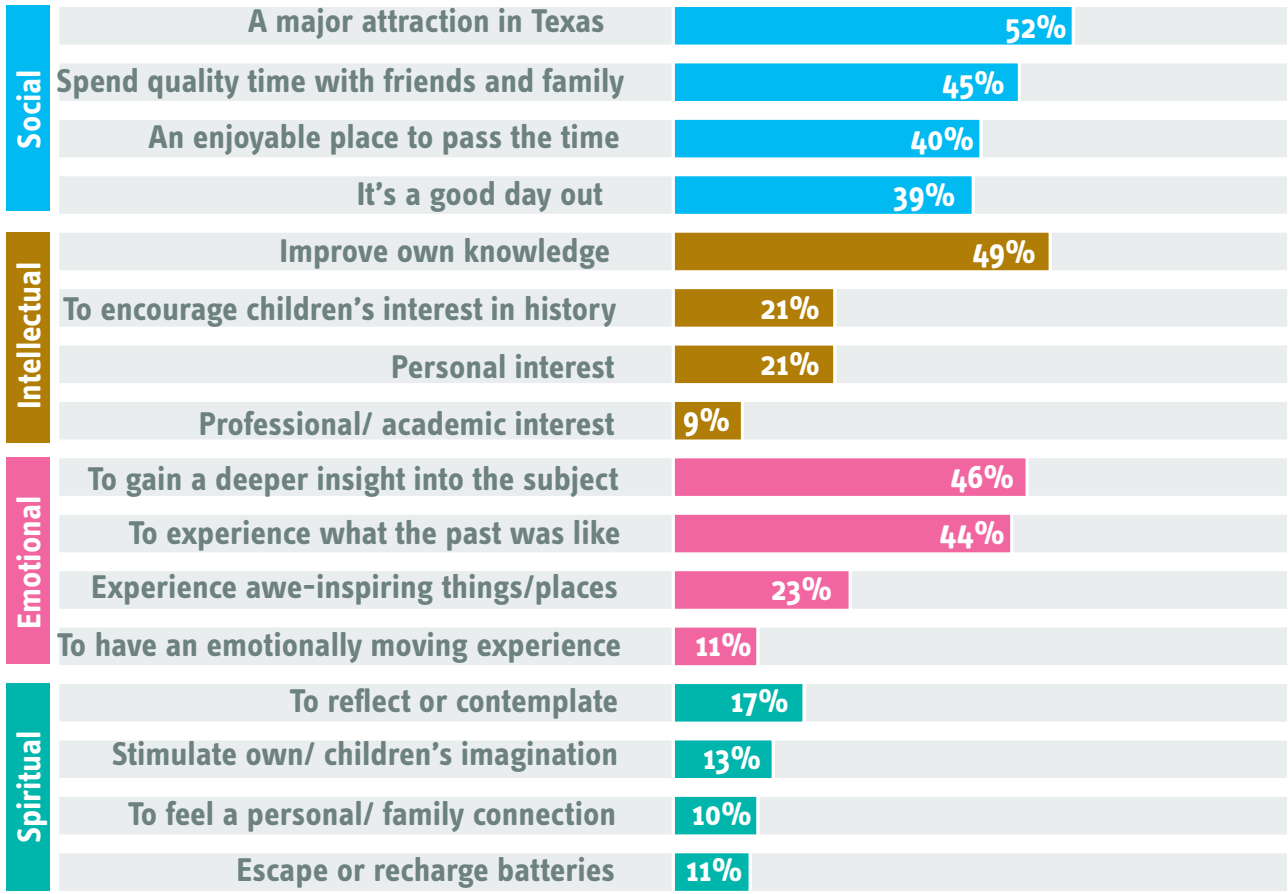
Intellectual

Social

[Base: 247]

Although visitors had a host of motivations to visit

All motivations to visit



[Base 249]

‘They got the kids flying on a broom which is super fun, Dad got to hear about guns, which is fun, and got some dolls. Yeah, it was great’

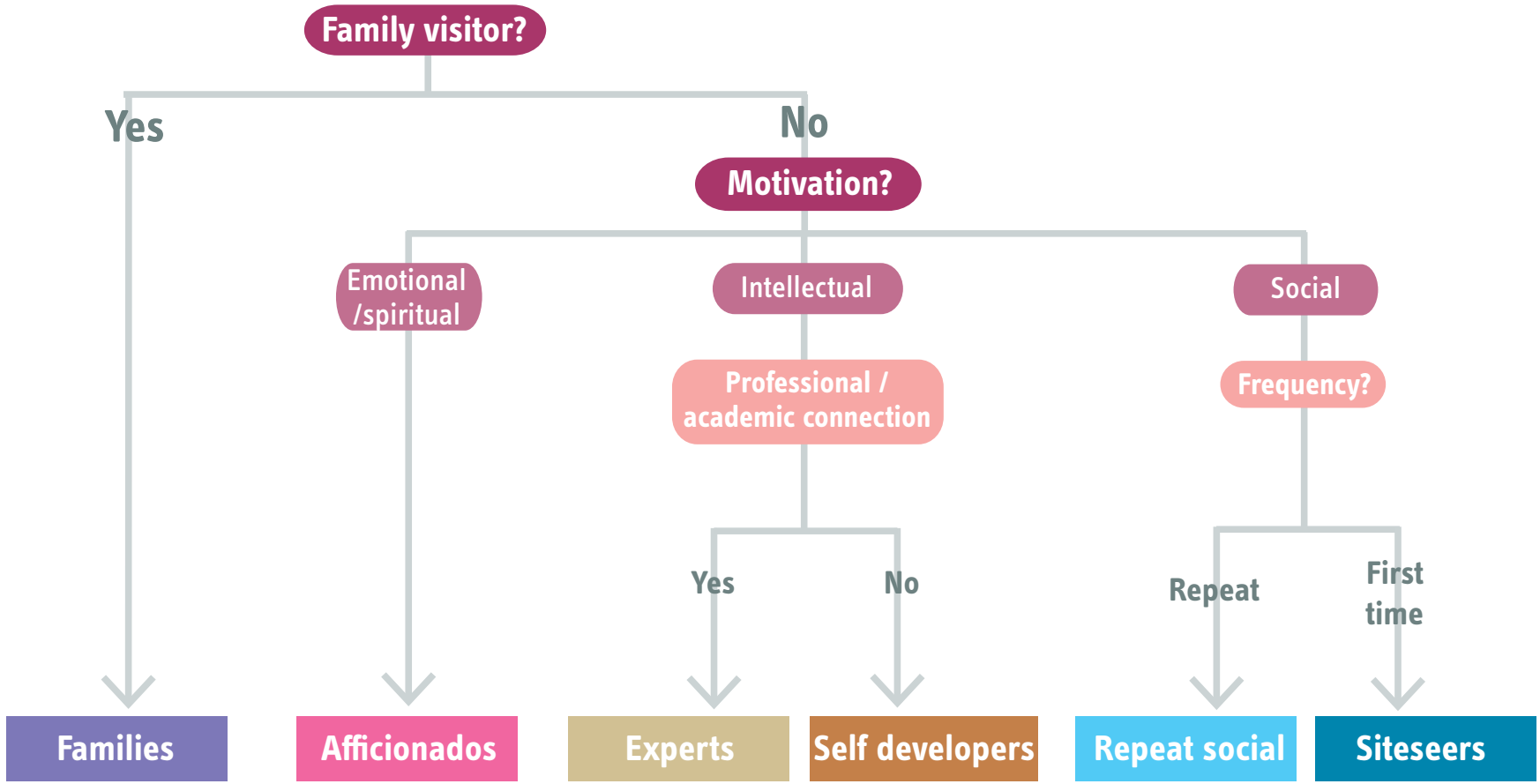
‘If somebody visits San Antonio, this is the first thing they should see, because this is actually like the flagship’

‘I have learned about the key players. I learnt more about what happened and where events happened from coming here’

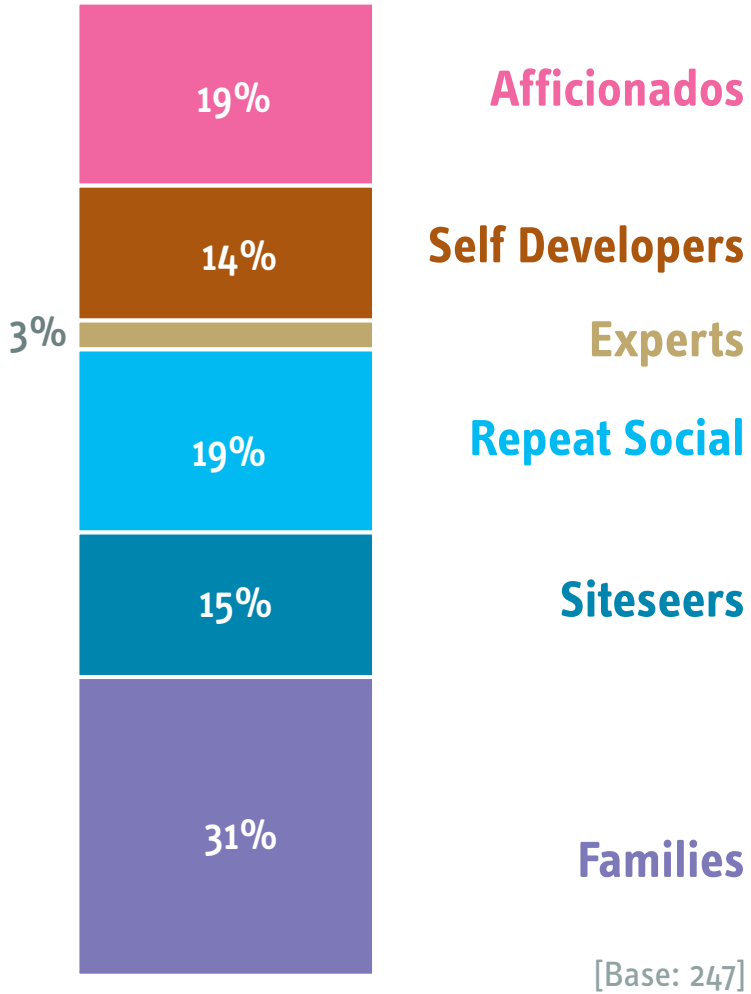
Visit modes provide a structure for visitor provision

By combining the motivations of visitors with some key profile information (family, knowledge level, visit frequency) we can determine a more granular ‘mode’ of visit:

Visit modes decision tree



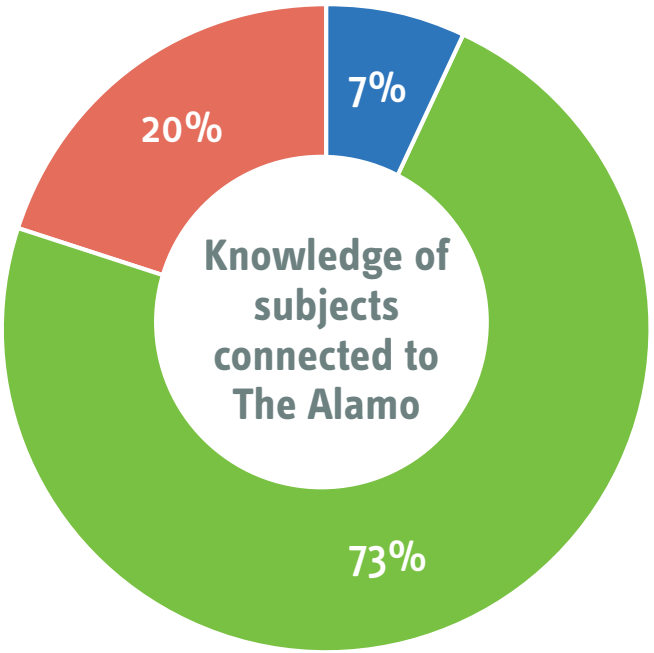
Families were the dominant visit mode



[Base: 247]

Most saw The Alamo as a site of **military history** and were only **vaguely aware** of its **social and religious** historical narratives **on arrival**.

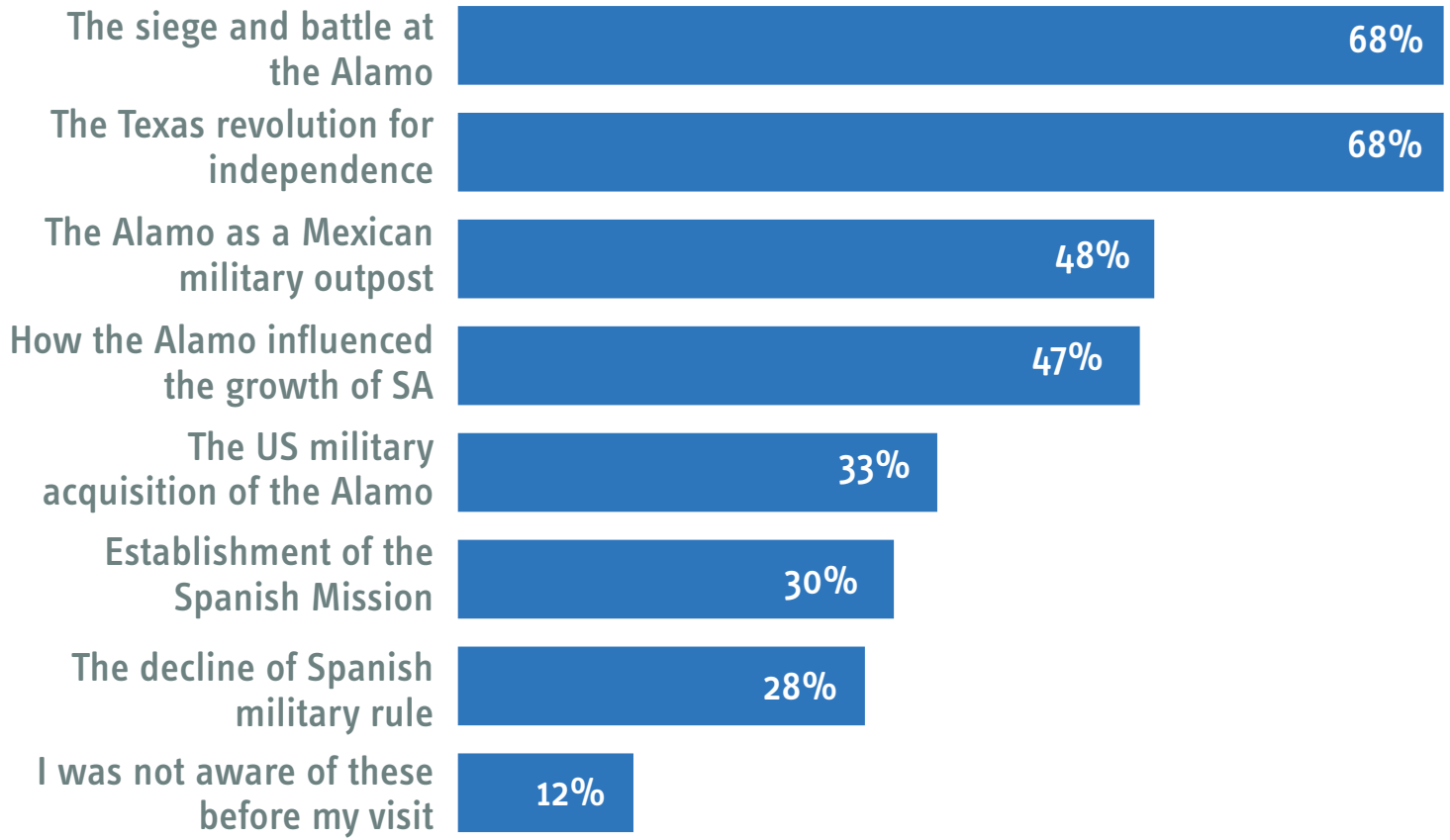
The majority had general knowledge of the subjects connected to The Alamo (self – identified)



Specialist knowledge
General knowledge
Little or no knowledge

[Base: 249]

The majority associate the site with the Battle and the Texan Revolution



[Base: 249]

The Alamo was most well-known for the battle…

‘The battle and the words Remember the Alamo’

‘Oh, it is known for the battle, The Alamo’

‘I didn’t know what happened before the battle’

...And the revolution for independence

‘Only that it became the battle cry for the Texans to defeat the Mexicans’

‘It is the beginning of the history of independent Texas’

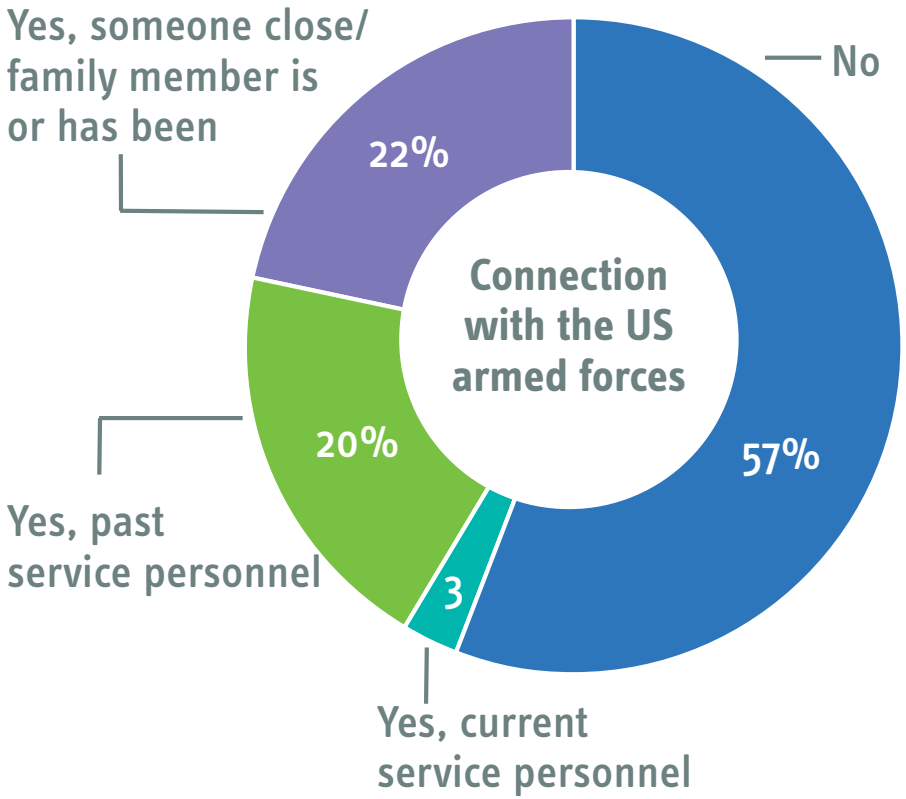
For some visitors, the battle and the revolution were the limit of their knowledge on arrival.

Lower awareness of Mission history

30% were aware of the site's Spanish Mission before they visited. However, repeat visitors were significantly more likely to be aware of Mission history (46%) than first-timers (16%).

'I was wondering why there was a church – like, what it had to do with The Alamo'

Two-fifths have some connection to armed forces



[Base: 249]

Uncertainty surrounds what a visit might entail

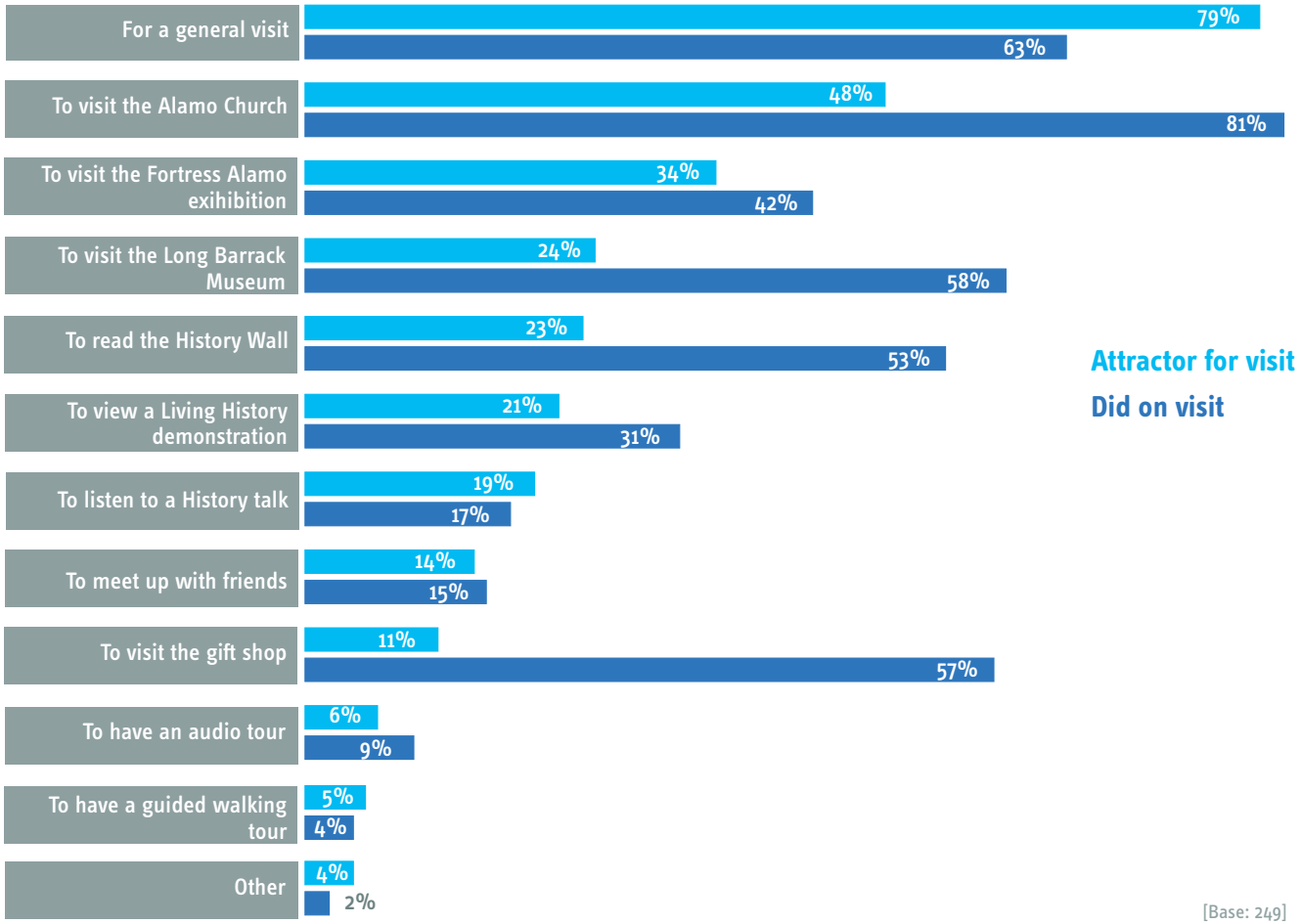
Reliant on onsite information

Our research indicates that **visitors are doing very little pre-visit research**. They **arrive with a low awareness** of the site and **rely on The Alamo** to fill their **information needs.**

However, when we see what visitors' engaged with during their visit, it appears that **some are not taking advantage** of the fullness of the offer.

‘I don’t really have expectations because I am not too sure exactly what it consists of’

Room to further engage visitors with the fullness of the offer

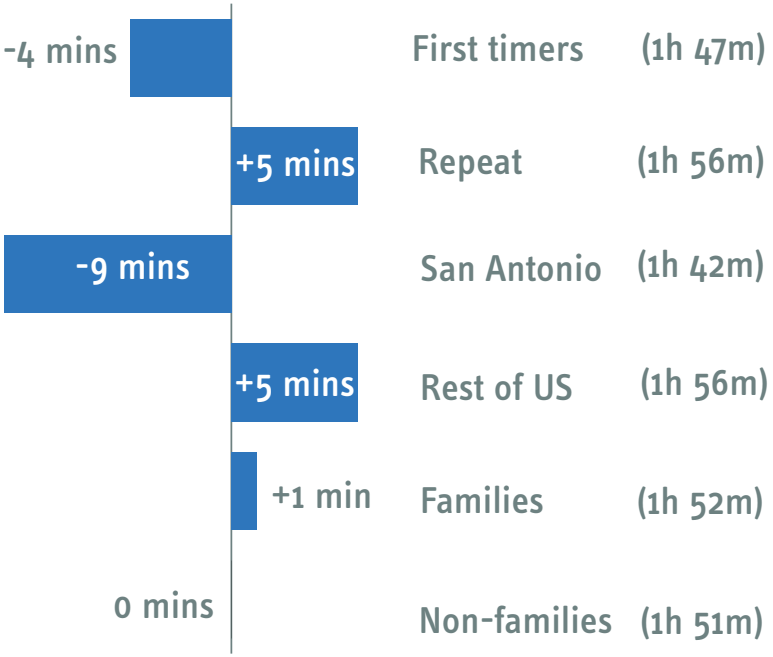


[Base: 249]

Average dwell

1 hour
51 minutes

Change in length of average visit compared to different visitor types



[Base 249]

Although visitors took their time on site

Average dwell is fairly consistent across visitor types.

Information needs not always fulfilled

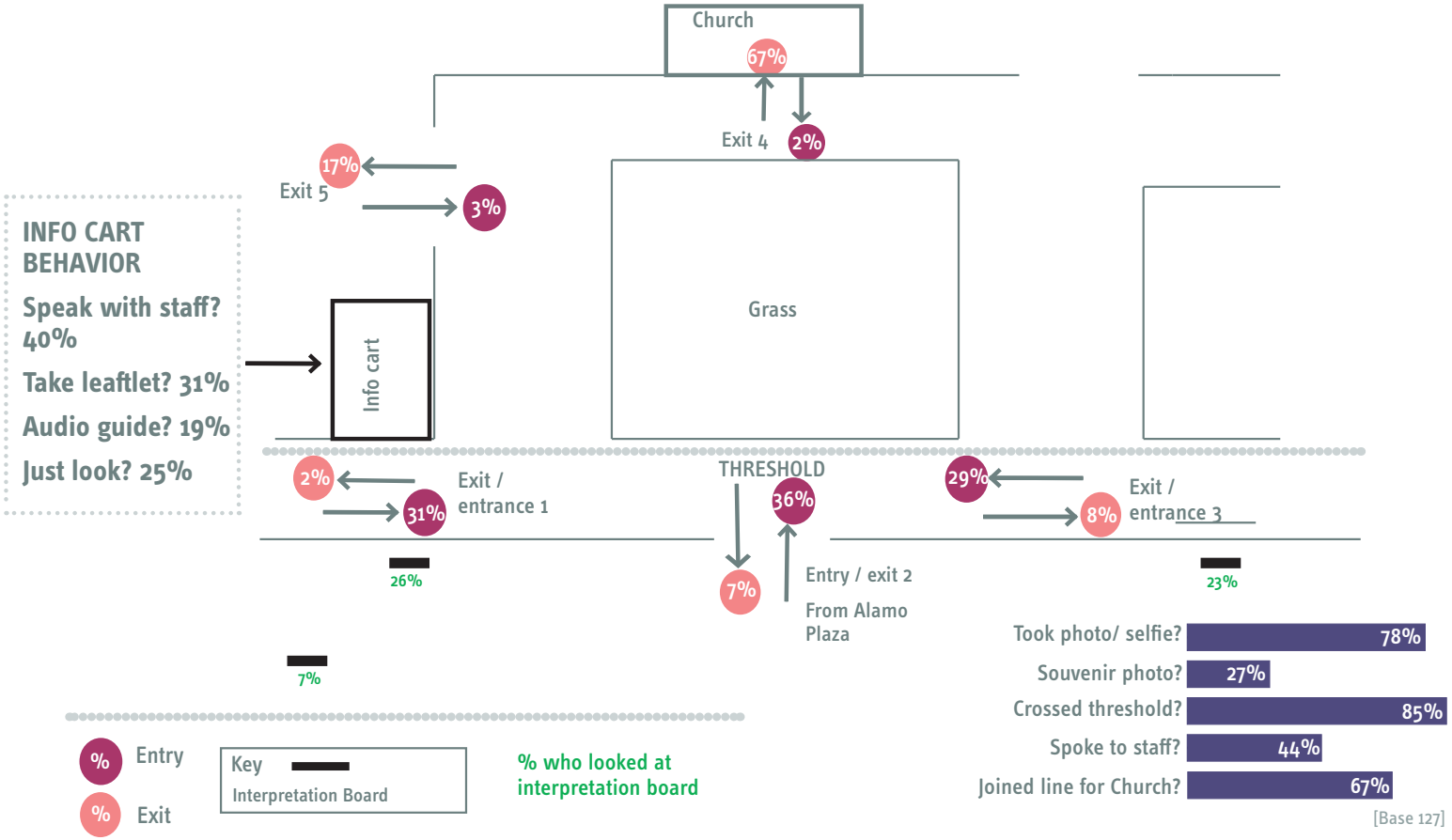
Essential to meet information needs at start of the visit

The information provided at the start of the visitor journey needs to be **more visible**, available in more **varied formats**, and visitor uptake of information should be encouraged by **site staff and volunteers**.

Essential to meet information needs at start of the visit

‘To have, when you come in, a sense of which way you’re going, a sense of the chronological history. So you know in advance what you’re going to see, where you’re going’

Area 2 - Plaza


Church
67%
Exit 4
2%
17%
Exit 5
3%
INFO CART BEHAVIOR
Speak with staff? 40%
Take leaftlet? 31%
Audio guide? 19%
Just look? 25%
Info cart
Grass
2%
31%
Exit / entrance 1
26%
THRESHOLD
36%
7%
Entry / exit 2
From Alamo Plaza
29%
8%
Exit / entrance 3
23%
7%
% Entry
% Exit
Key
Interpretation Board
% who looked at interpretation board
Took photo/ selfie? 78%
Souvenir photo? 27%
Crossed threshold? 85%
Spoke to staff? 44%
Joined line for Church? 67%
[Base 127]

Most enter the site without on-boarding first

42% engaged with the info cart, which means that most enter the site without introductory information.

We would suggest focusing more actively on-boarding before visitors enter the Church, which may require placing of additional information.

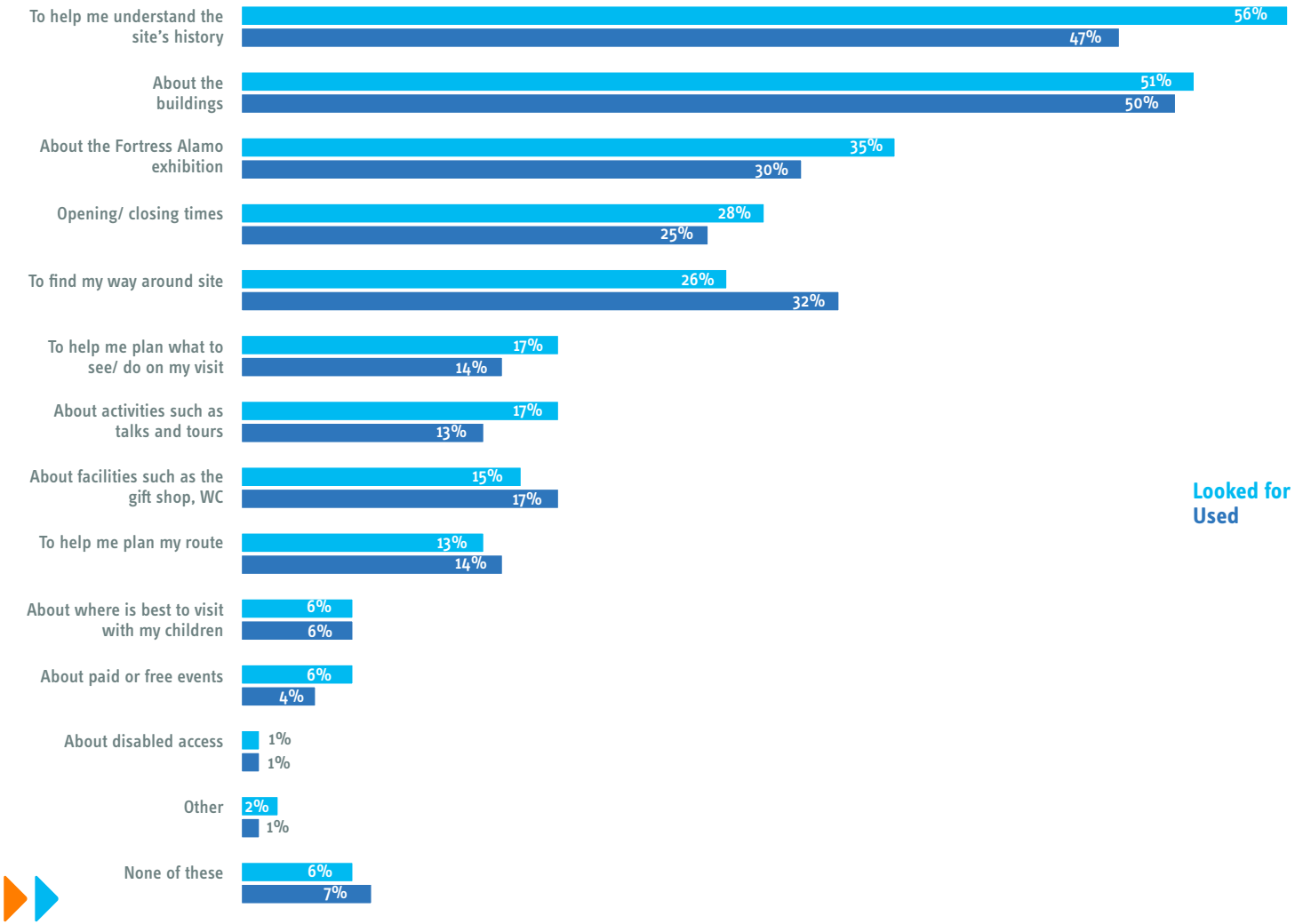
On-boarding more likely to happen in the Church

59% were making use of the available sources at the information desk or speaking to staff.

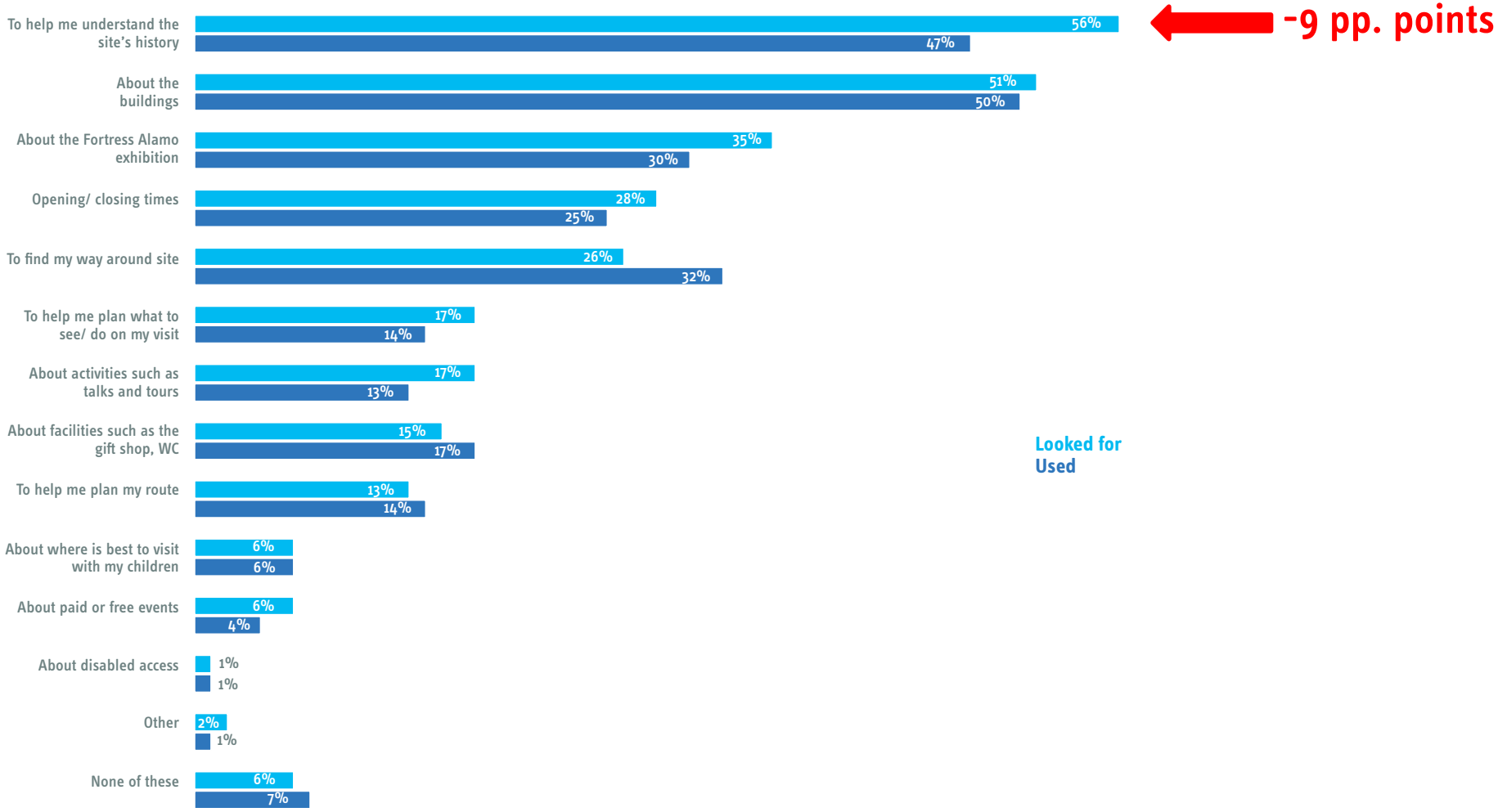
However, for many, the Church will be the **main focus** of their visit and seeking out introductory information will take visitors **out of the experience**. It may likely inhibit visitors receiving **emotional or spiritual** outcomes in this space.

‘So far [in the church] it’s just confusing and kind of hard to get around and figure out the sequence of events that took place here. We’ll see if it makes more sense when we get out’

Information needs were focused around the site's history



Some visits resulted in an information gap



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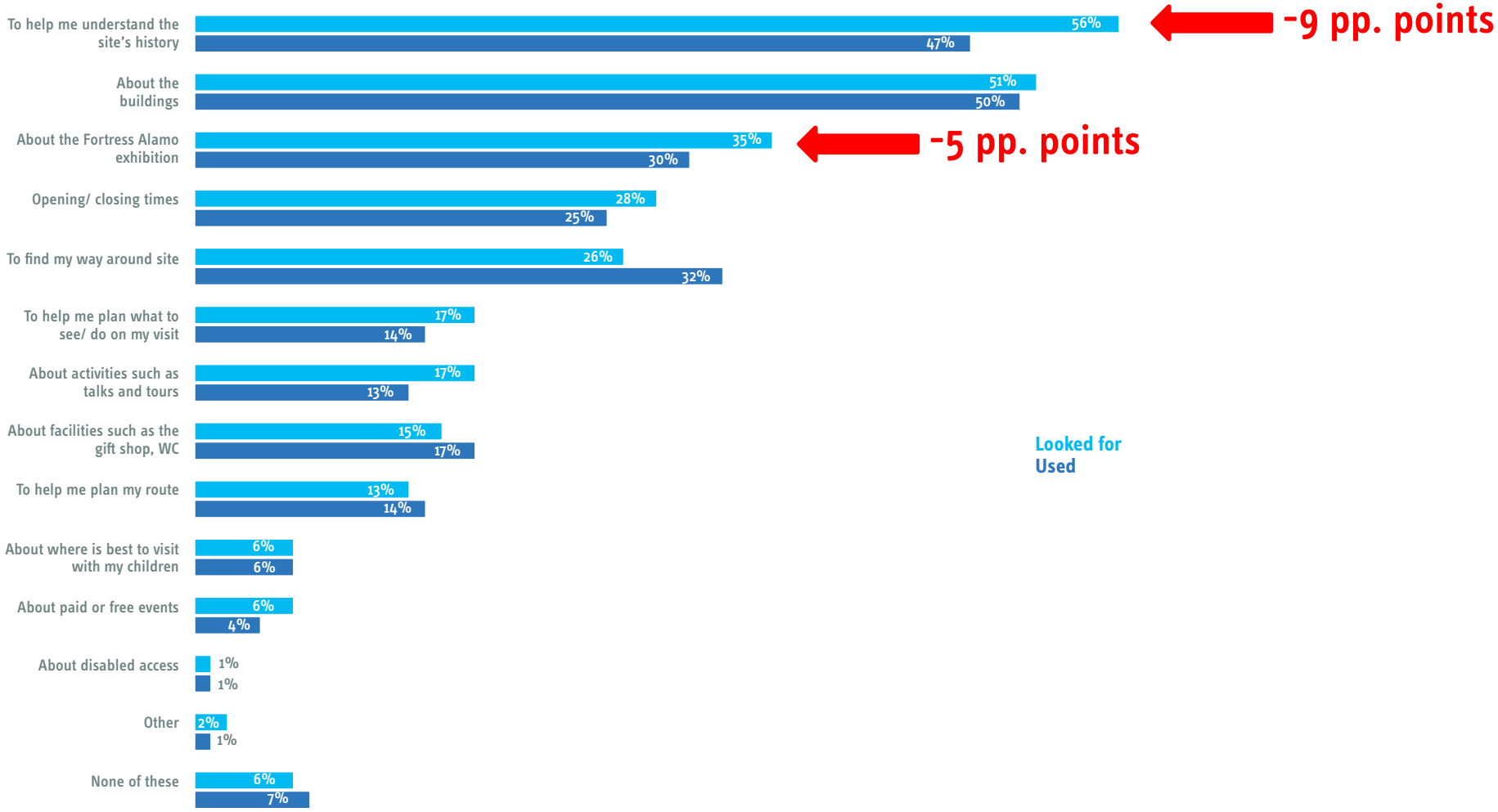

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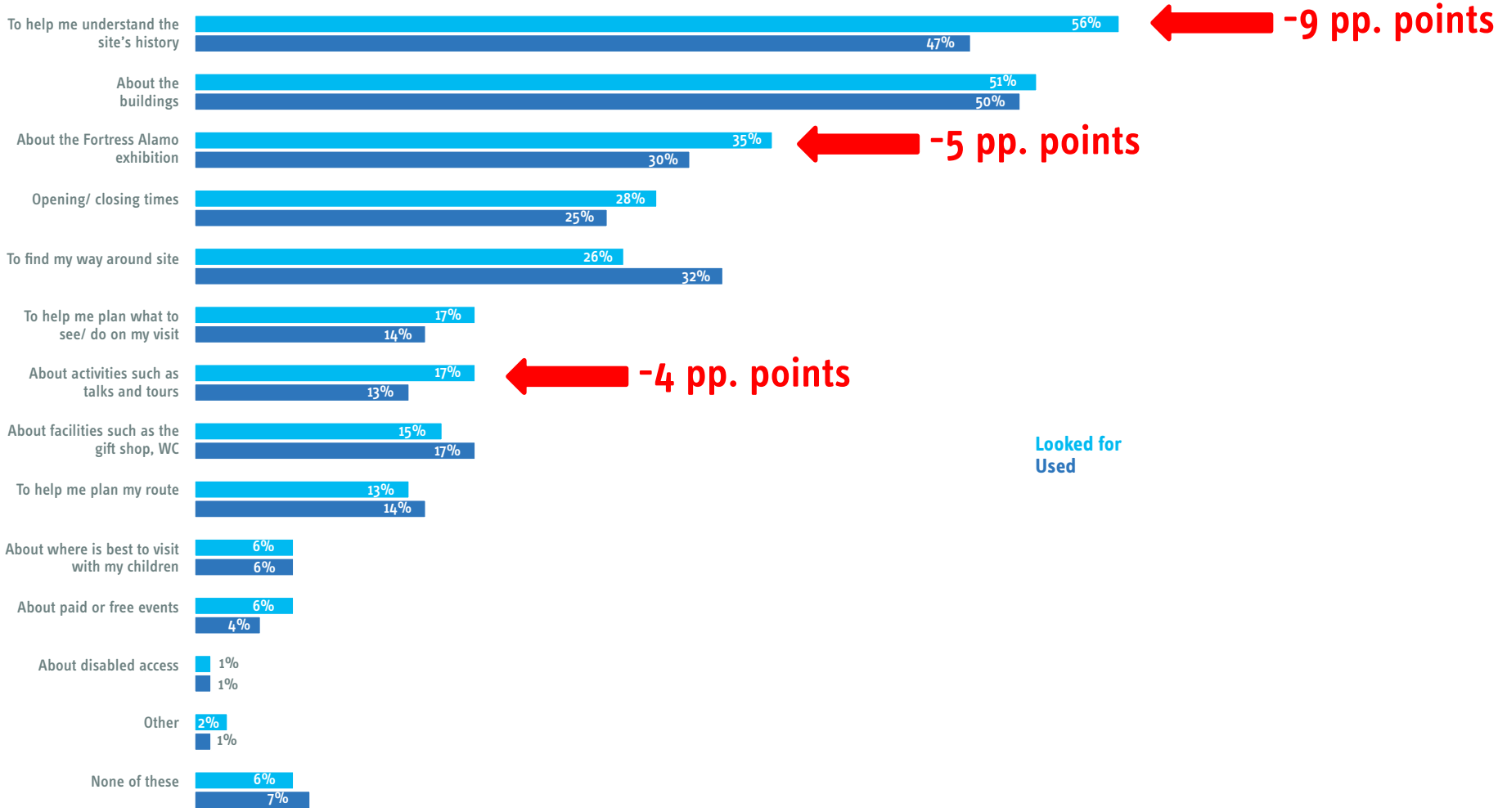
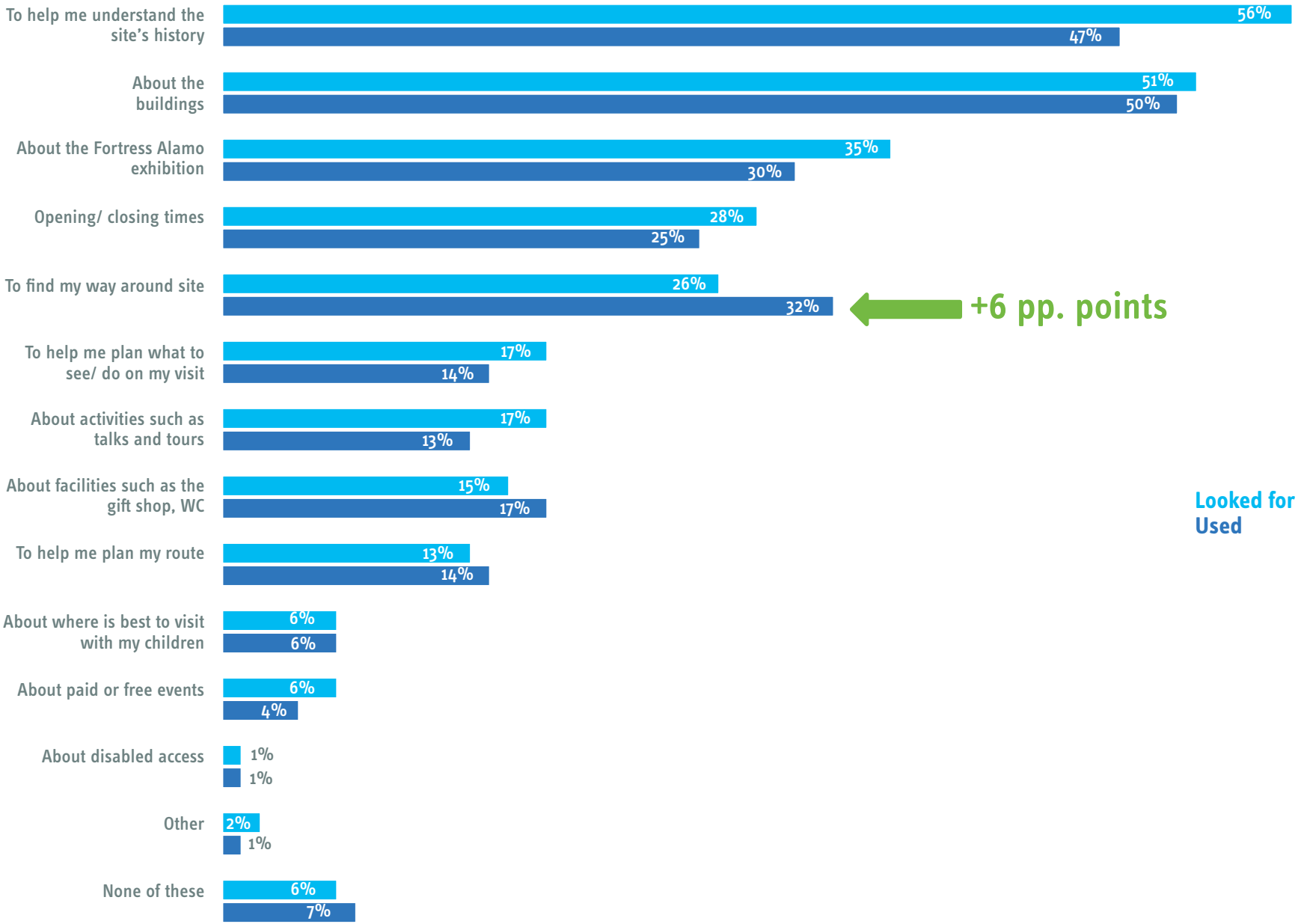


Navigation information provided more effectively



[Base: 249]

Some visitors were grateful for potted information and many observed the information was succinct

‘[I received] enough information to learn something but not too specific where it takes too long to read’

‘Yes, just enough to explain everything’

‘If you have the high points, that’s good enough’

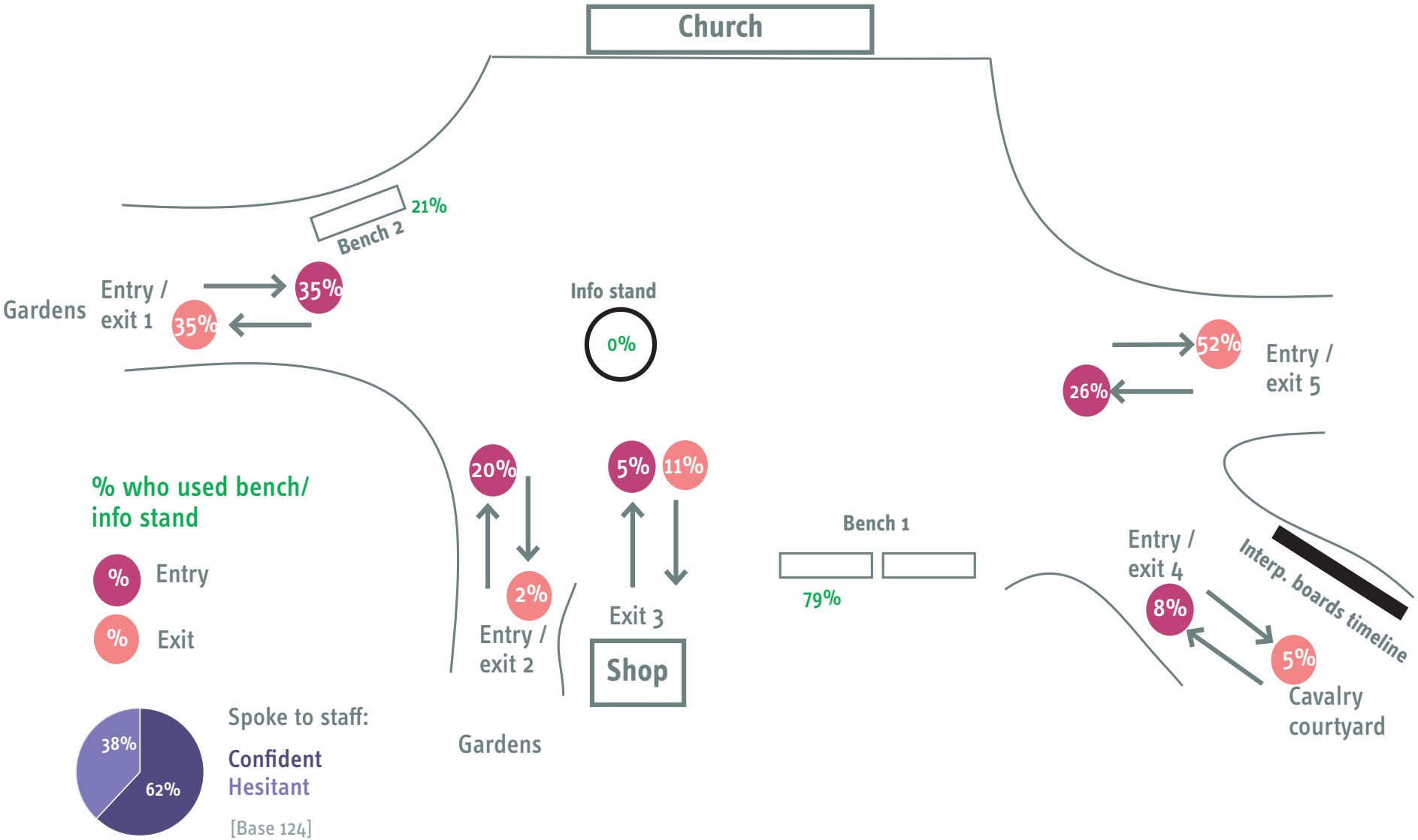
But others were looking for more depth

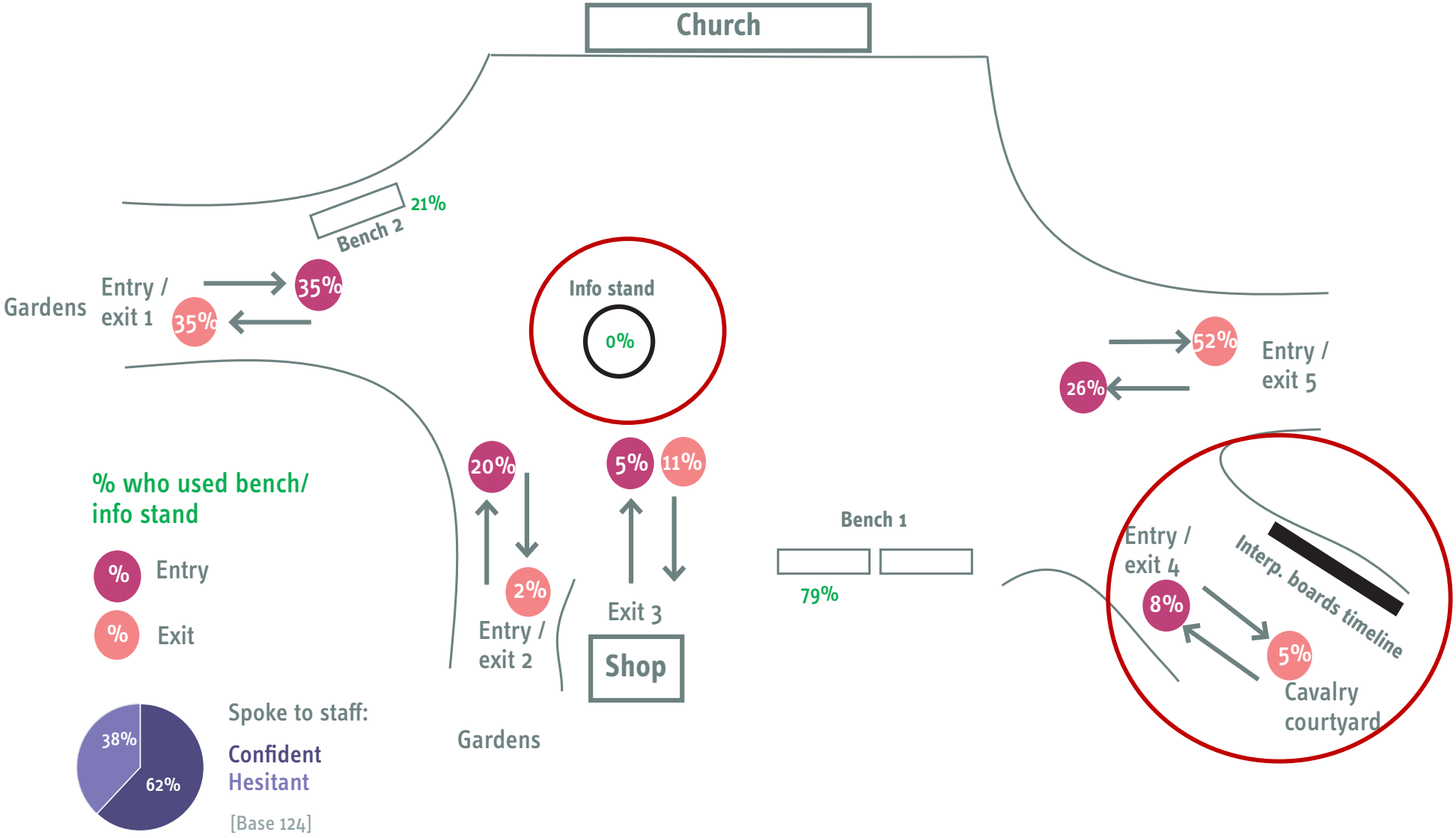
‘I wish there was a lot more information but it just kind of gave an overview’

‘There’s just a lot of general information right now’

This highlights the need for more forms of layered interpretation, providing visitors access to more detailed insight if they wish to explore further.

Low uptake of information could in some circumstances be connected to **the placing** of specific sources.


Church
Bench 2
21%
Gardens
Entry / exit 1
35%
35%
Info stand
0%
52%
26%
Entry / exit 5
% who used bench/ info stand
% Entry
% Exit
20%
2%
Entry / exit 2
5%
11%
Exit 3
Shop
Bench 1
79%
Entry / exit 4
8%
Interp. boards timeline
5%
Cavalry courtyard
Gardens
Spoke to staff:
38%
62%
Confident
Hesitant
[Base 124]


Church
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Exit 3
Shop
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Confident
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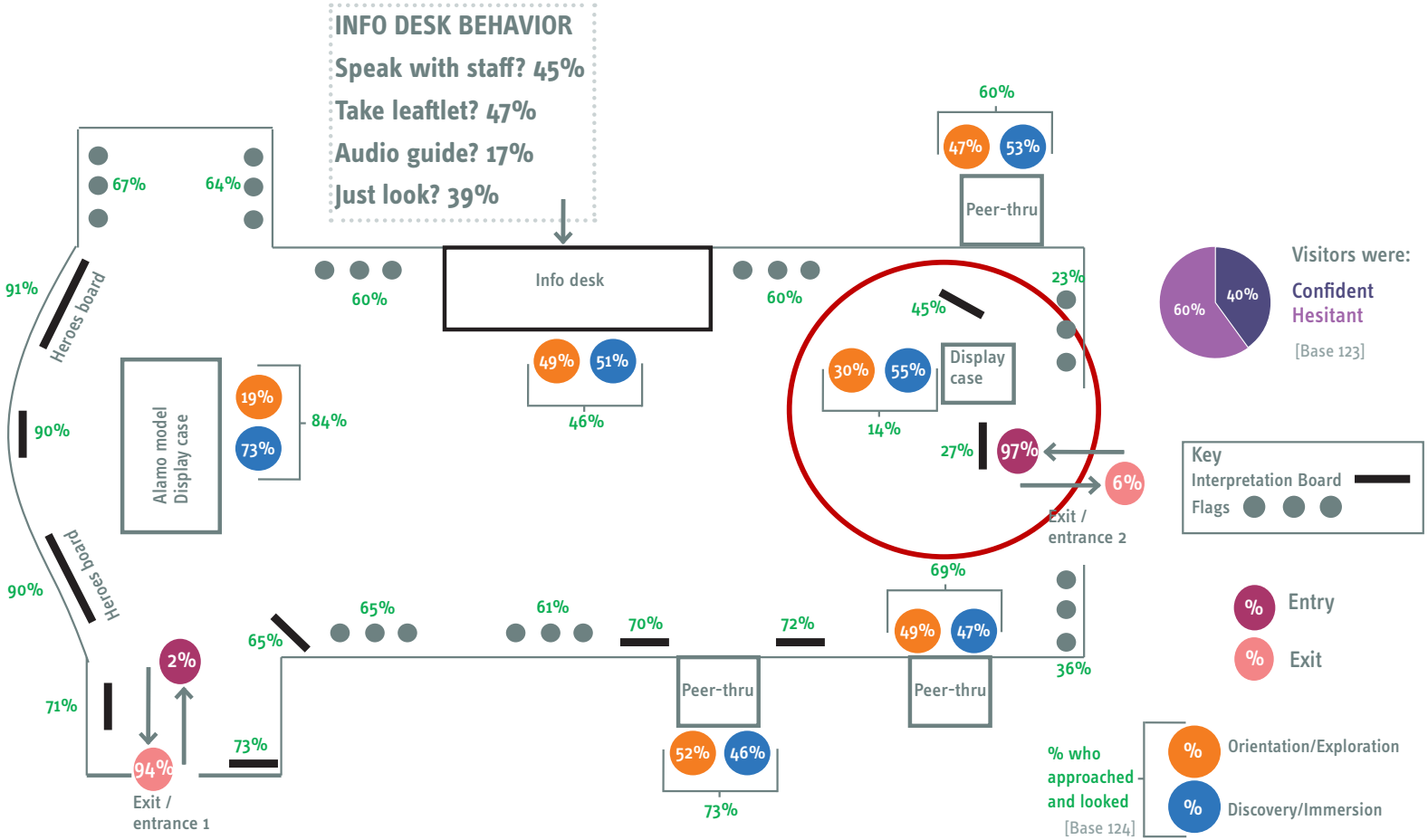
[Base 124]

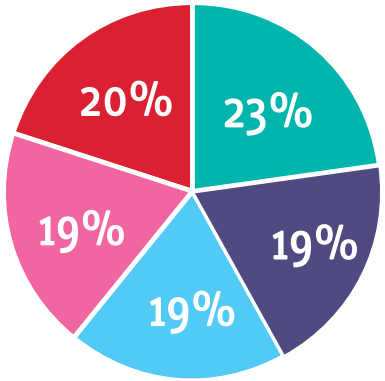

INFO DESK BEHAVIOR
Speak with staff? 45%
Take leaftlet? 47%
Audio guide? 17%
Just look? 39%
Info desk
Peer-thru
Peer-thru
Peer-thru
Display case
Alamo model Display case
Heroes board
Heroes board
Exit / entrance 1
Exit / entrance 2
Visitors were:
Confident
Hesitant
[Base 123]
Key
Interpretation Board
Flags
Entry
Exit
% who approached and looked
[Base 124]
Orientation/Exploration
Discovery/Immersion

The majority engaged with the content available

Visitors in this mode...	Select objects in this way...	And behaviour in this way...
Researching	**Specific objects or collections**	Researchers are typically focused, specialist museum visitors, selecting objects themselves based on their in-depth knowledge of the subject area. These users study, sketch or examine objects, and seek expert opinion, perhaps having made an appointment with the gallery.
Choosing	**Specific objects or collections**	These visitors confidently pick individual objects of interest and become quickly immersed in them, using their existing knowledge. They may be objects they have seen before.
Searching	**Classification or collection**	Searchers have a good general understanding of the topic, and want the museum to select and present the best objects. They have an applied agenda, following the layout of the exhibition and consuming all available interpretation.
Following	**Narrative theme**	Followers need a narrative explanation, and want the museum to select and present objects illustrating themes. These users broadly look at most objects and in a sequential pattern.
Browsing	**Random objects**	These visitors select random pieces through the room in no narrative or sequence. They look at whatever catches their eye.

Visitors were most likely to Browse in the Church

Church



Browsing
Following
Searching
Choosing
Researching

[Base: 124]

Visitors were most likely to **Browse**, selecting **random** pieces **without narrative sequence.**

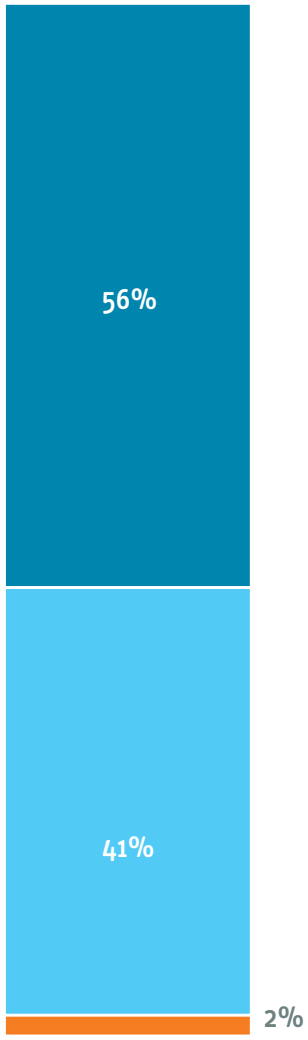
Researching, purposefully selecting **specific** objects for **detailed** study, was also common.

Depth of engagement

Engagement is measured by observing the highest level of engagement reached in a room.

If a visitor walks straight through a room, they do not register on this scale.

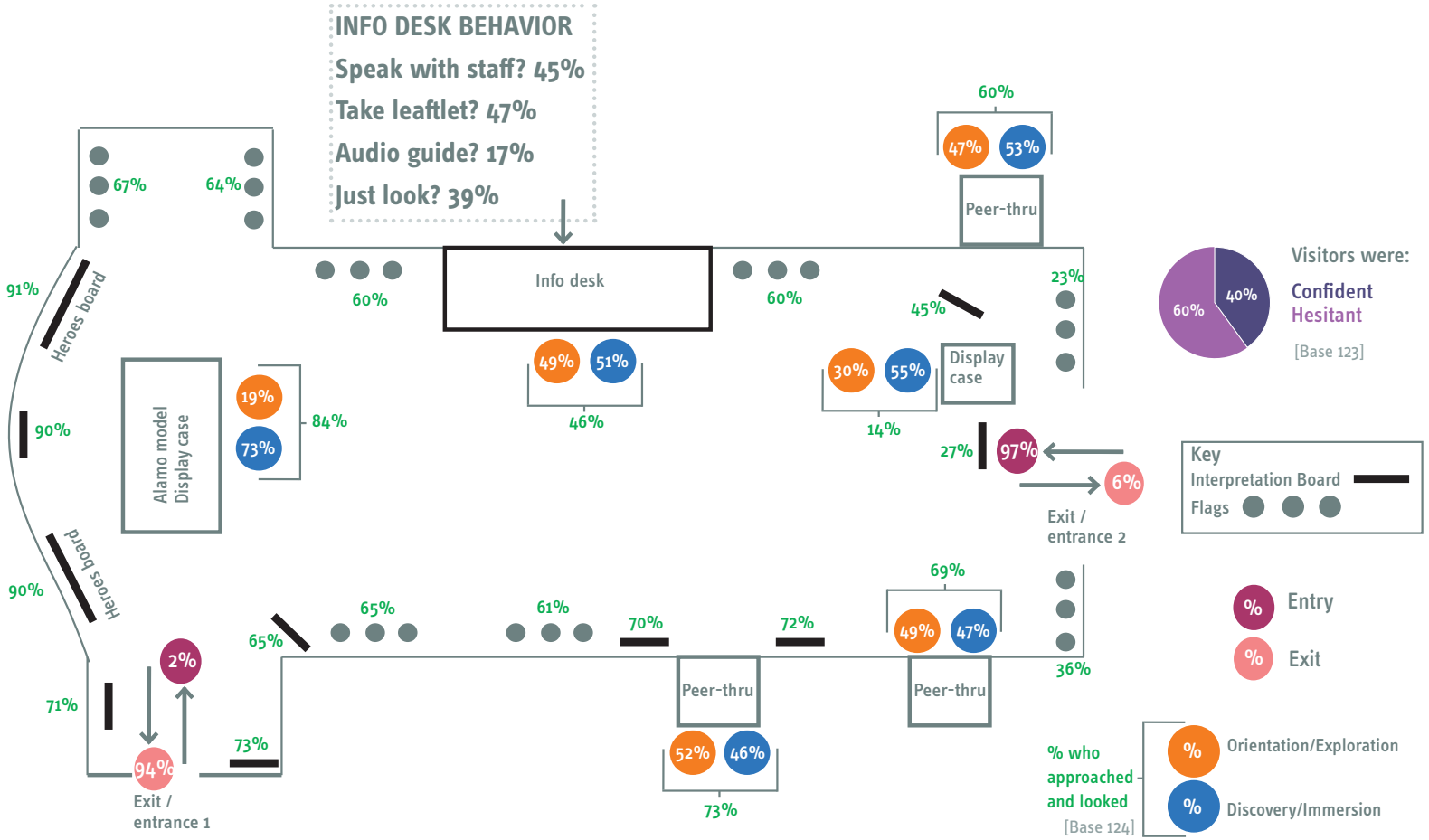
Over half of visitors reached immersion in the Church



Immersion
Discovery
Exploration
Orientation

[Base: 123]

At least one object within the Church immersed 56% of visitors, meaning they **stayed** for some time and were **deeply engrossed** **in it.**


INFO DESK BEHAVIOR
Speak with staff? 45%
Take leaftlet? 47%
Audio guide? 17%
Just look? 39%
Info desk
Peer-thru
Peer-thru
Peer-thru
Display case
Alamo model Display case
Heroes board
Heroes board
Exit / entrance 1
Exit / entrance 2
Visitors were:
Confident
Hesitant
[Base 123]
Key
Interpretation Board
Flags
Entry
Exit
% who approached and looked
[Base 124]
Orientation/Exploration
Discovery/Immersion

Highest engagement was at the back of the Church

Visitors exhibited high levels of engagement with objects and interpretation towards the back of the Church.

Majority engaged with the Heroes board, and the Vox Pops indicate that this interpretation resonated particularly.

‘I’ve learned something new. I hadn’t realised there were so many foreigners involved – the heroes, the defenders – I’d imagined them to be all pretty local and instead they were from all over’

Visitors valued having a variety of information mediums

Opportunities to **watch** movies, **listen** to audio guides, **experience** Living History, and **see** original **architecture** and **artefacts** facilitated **deep engagement**.

'...Otherwise there's just a lot of reading which doesn't always help'

The movie provides useful interpretation

‘I really enjoyed the movie because it’s very structured and then you get the whole history overview which is a very nice addition to the posters’

‘[The movie was] very excellent and insightful’

‘Oh there is [a movie]? I didn’t see it’

Audio tours add depth to learning experience

‘The audio has been really helpful to understand the context of things’

‘The audio tour gave me all the information I needed’

‘I didn’t know where the audio guide was. I had no clue where to find that and there was no one behind the counter’

Visitors respond very positively to human interpretation

Human interpretation at The Alamo was **a highlight** for many, particularly the **Living History** demonstrations.

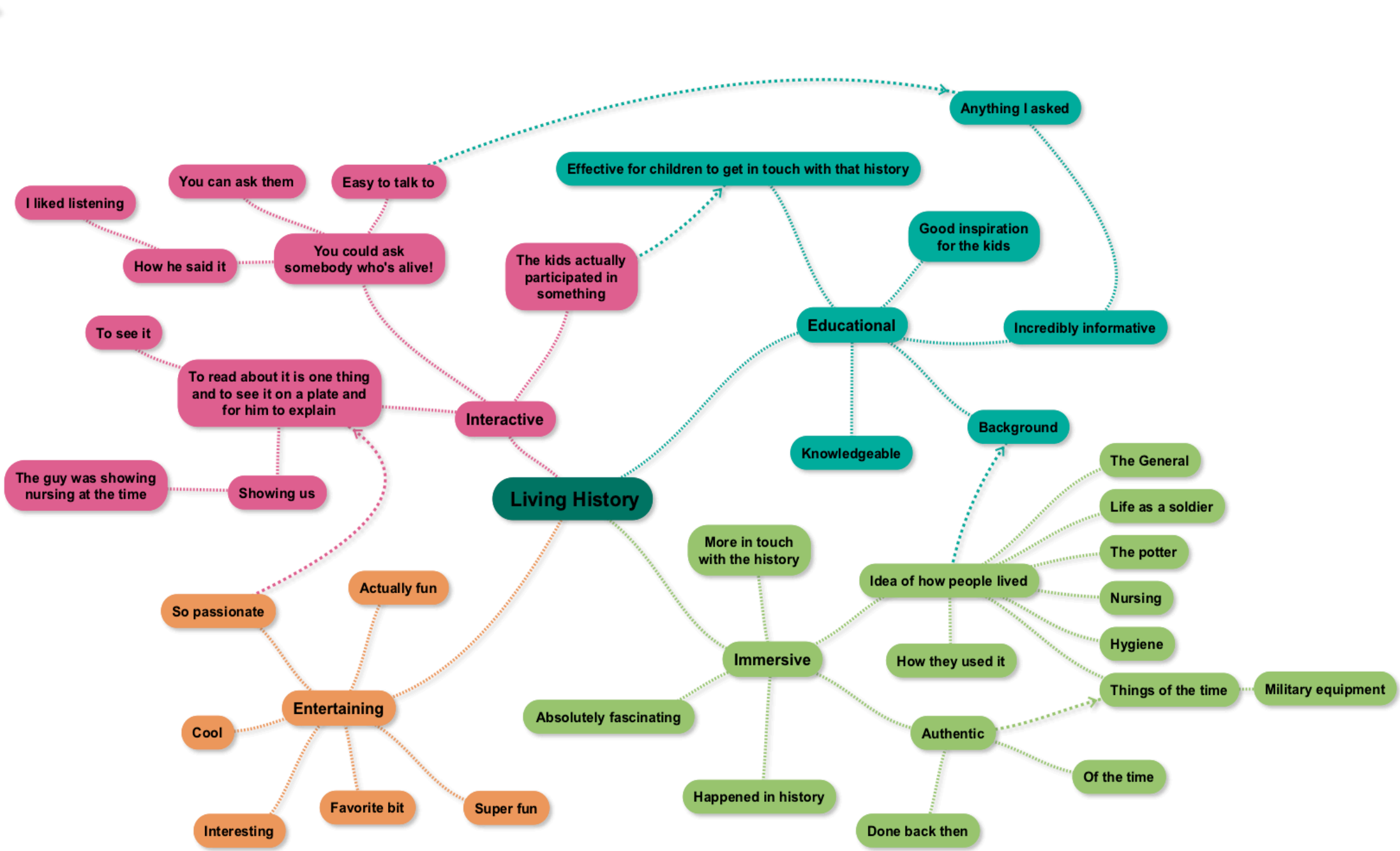
Our **research continually finds** that **human interpretation**, particularly at heritage sites, is **highly valued** and can **significantly increase engagement** with content. We would **recommend** that this type of information provision continues within the new development.

Living History enthralled visitors

31% of visits included watching a Living History demonstration, so considering the **positive impact** this had on a visit it may be advisable to **promote further**.

Visitors had **great feedback**, appreciating that they could learn in an **entertaining** and **immersive** way.

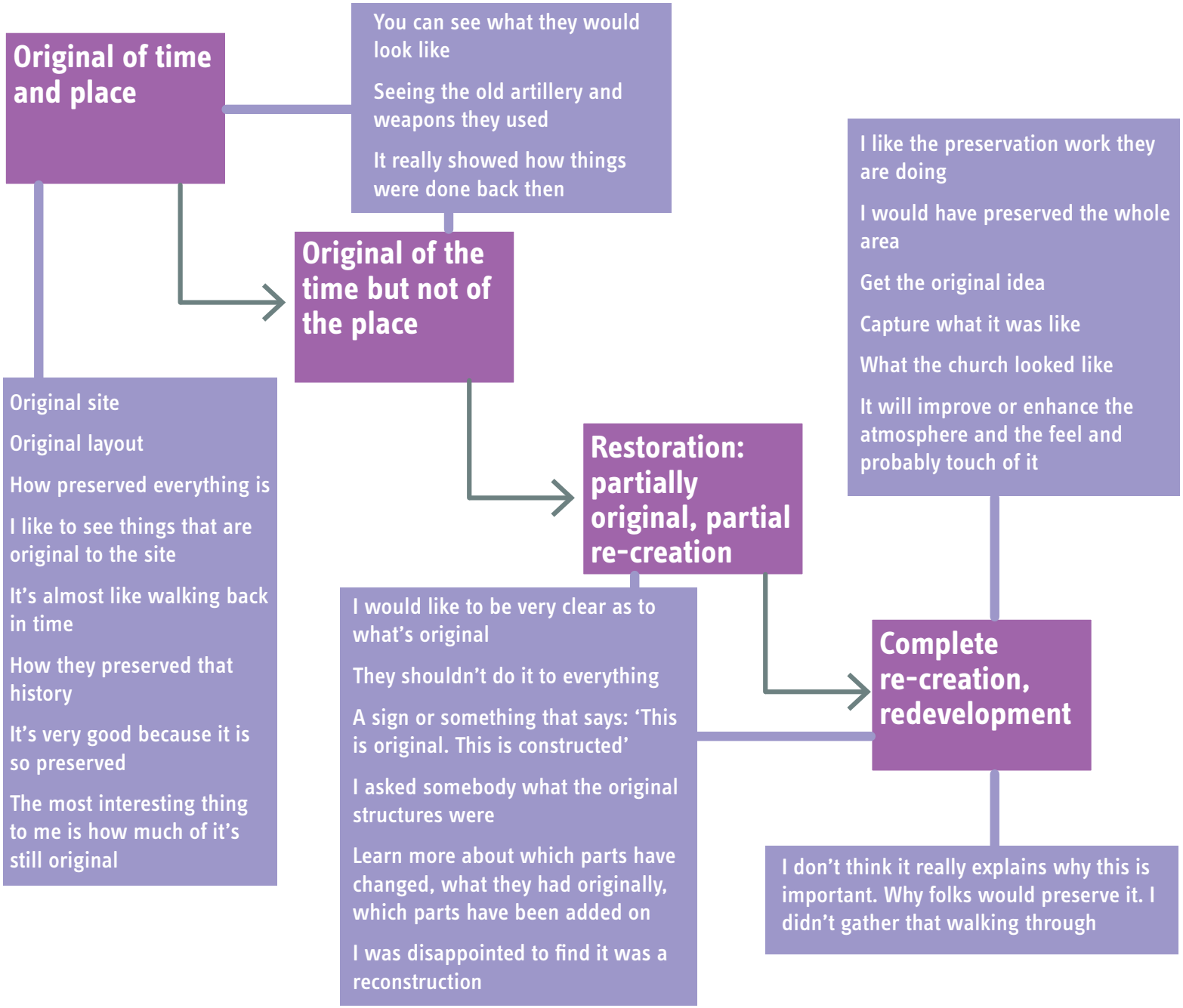
‘This I really wanted to see [Living History] because I really wanted to get an idea of how people lived at the time’


Anything I asked
Easy to talk to
You can ask them
I liked listening
How he said it
You could ask somebody who's alive!
Effective for children to get in touch with that history
The kids actually participated in something
Good inspiration for the kids
Educational
Incredibly informative
To see it
To read about it is one thing and to see it on a plate and for him to explain
Interactive
Background
Knowledgeable
The guy was showing nursing at the time
Showing us
Living History
The General
Life as a soldier
The potter
Nursing
Hygiene
Idea of how people lived
More in touch with the history
Actually fun
So passionate
Immersive
How they used it
Things of the time
Military equipment
Entertaining
Absolutely fascinating
Authentic
Cool
Of the time
Happened in history
Favorite bit
Super fun
Done back then
Interesting

A desire for more immersive and personal experiences

The Alamo's **historical atmosphere** was appreciated, but visitors wanted a **more immersive experience** with focus on **representative, personal narratives**.

Degrees of human intervention and terms used by the audience to identify them



Visitors want transparency

However, visitors had a sense that some areas of the site were not authentic and were **keen to distinguish** between authentic and restored elements.

‘[I’d like] A sign or something that says: “This is original. This is constructed”’

Site's authenticity was important to visitors

Visitors really enjoyed the site's **original objects** and **architecture**. These helped them to **connect** to the past, providing a more **immersive** and authentic experience.

'It's almost like walking back in time'

The human, personal stories were most likely to resonate

Visitors clearly found the human narrative of The Alamo rewarding and one of the favourite aspects of their visit.

‘The people who were here – why were they here?’

Knowing the individuals helped visitors to relate

‘Knowing some of the names of the historical figures, I think that’s very meaningful. To realise what happened here’

Some expected a range of perspectives

‘This is the American version, so there are always two sides to a story.’

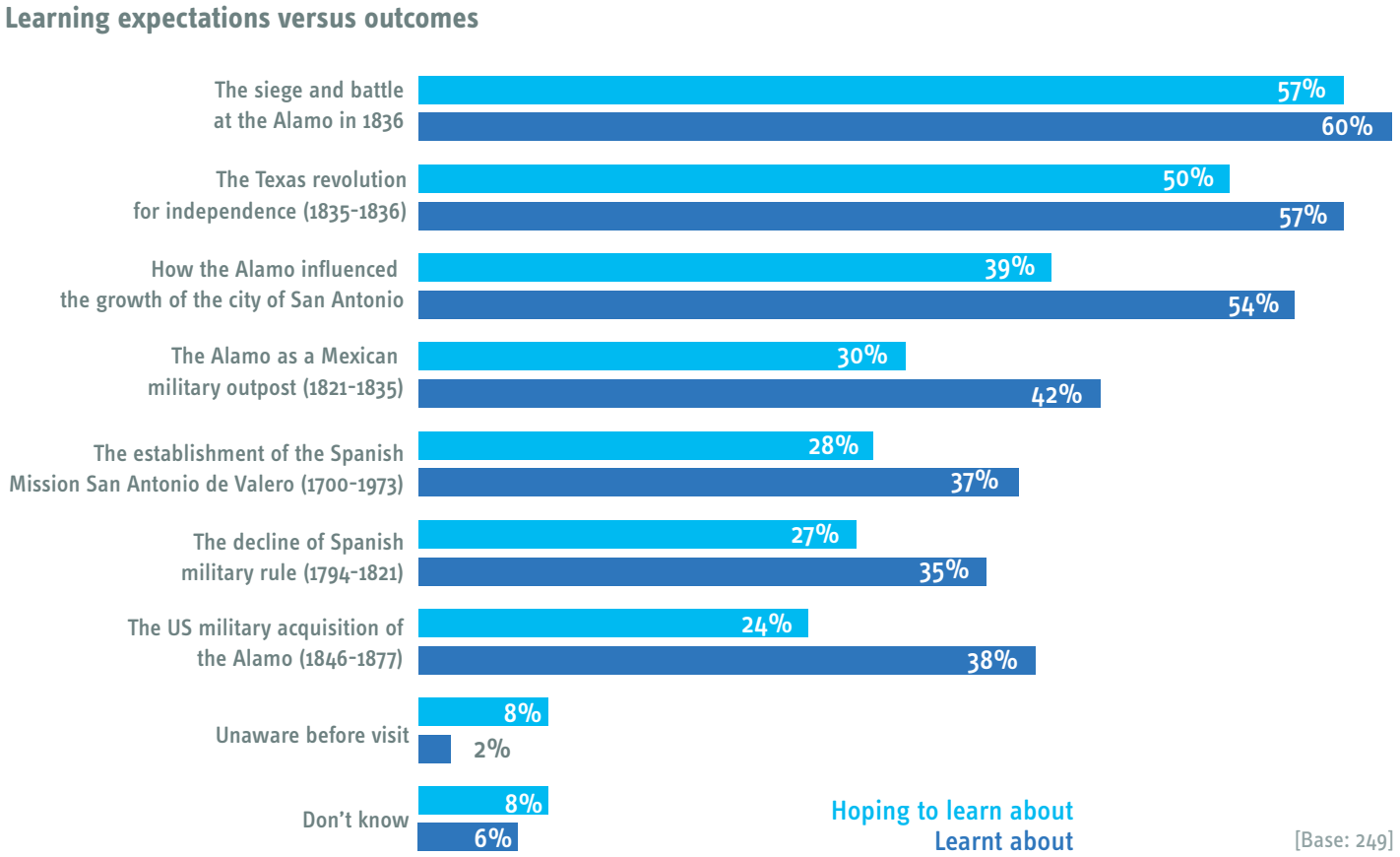
From a wider view point

‘I’d want to see more of the indigenous people that were colonized. It’s like “Oh, it’s a tribute to one colonizer fighting with another colonizer”, as opposed to having a really genuine, true presence’

‘I expected to see a little more history written from the Mexican point of view’

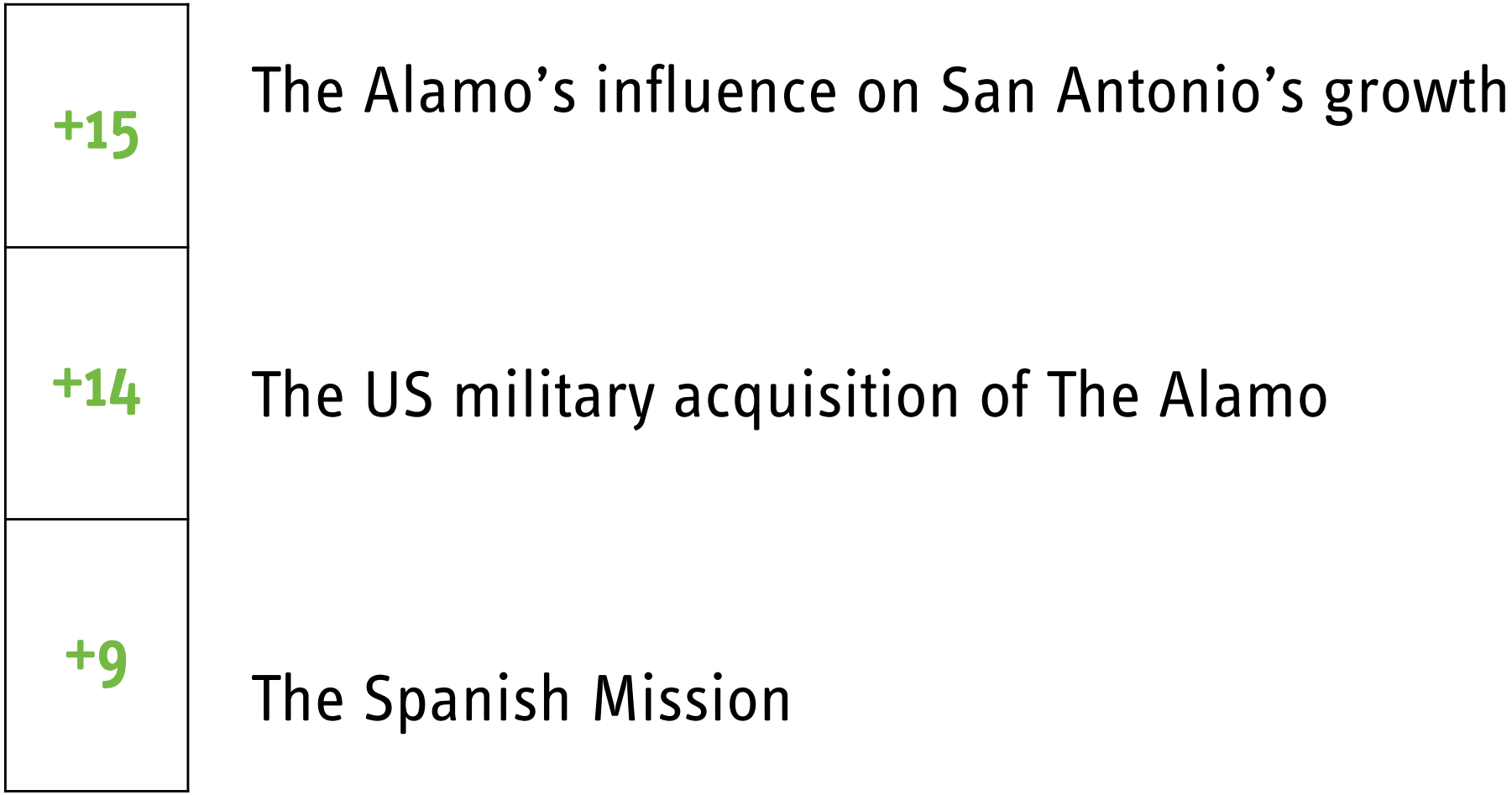
‘What I did think I knew kind of gets thrown out of the window’

Many achieved their learning aims but room to expand knowledge



Those on visits learned unexpected things: top three

pp. difference



Mission history still missing for some

Despite the **positive increase** in those who learnt about The Alamo's time as a Spanish Mission, some of those visiting still felt that the Mission's history **was missing** from the overall narrative.

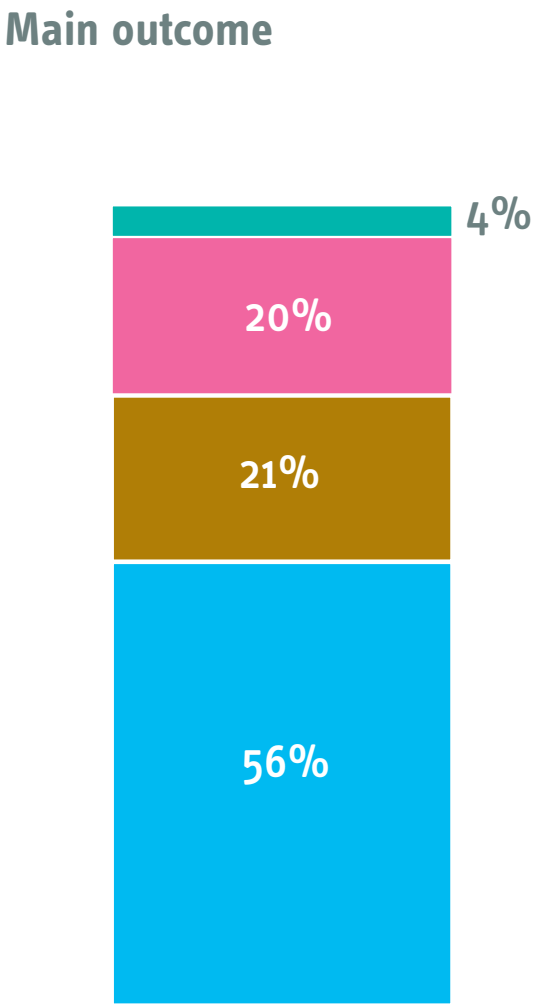
Mission history still missing for some

‘It seems to me that the focus is really on the battle and its role in the movement to independence’

‘I’ve been to a lot of missions in California where they focus a lot more on the mission aspect and everything, so there was very little, I felt, here’

More visits resulted in social outcomes than anticipated

Higher social outcomes than motives

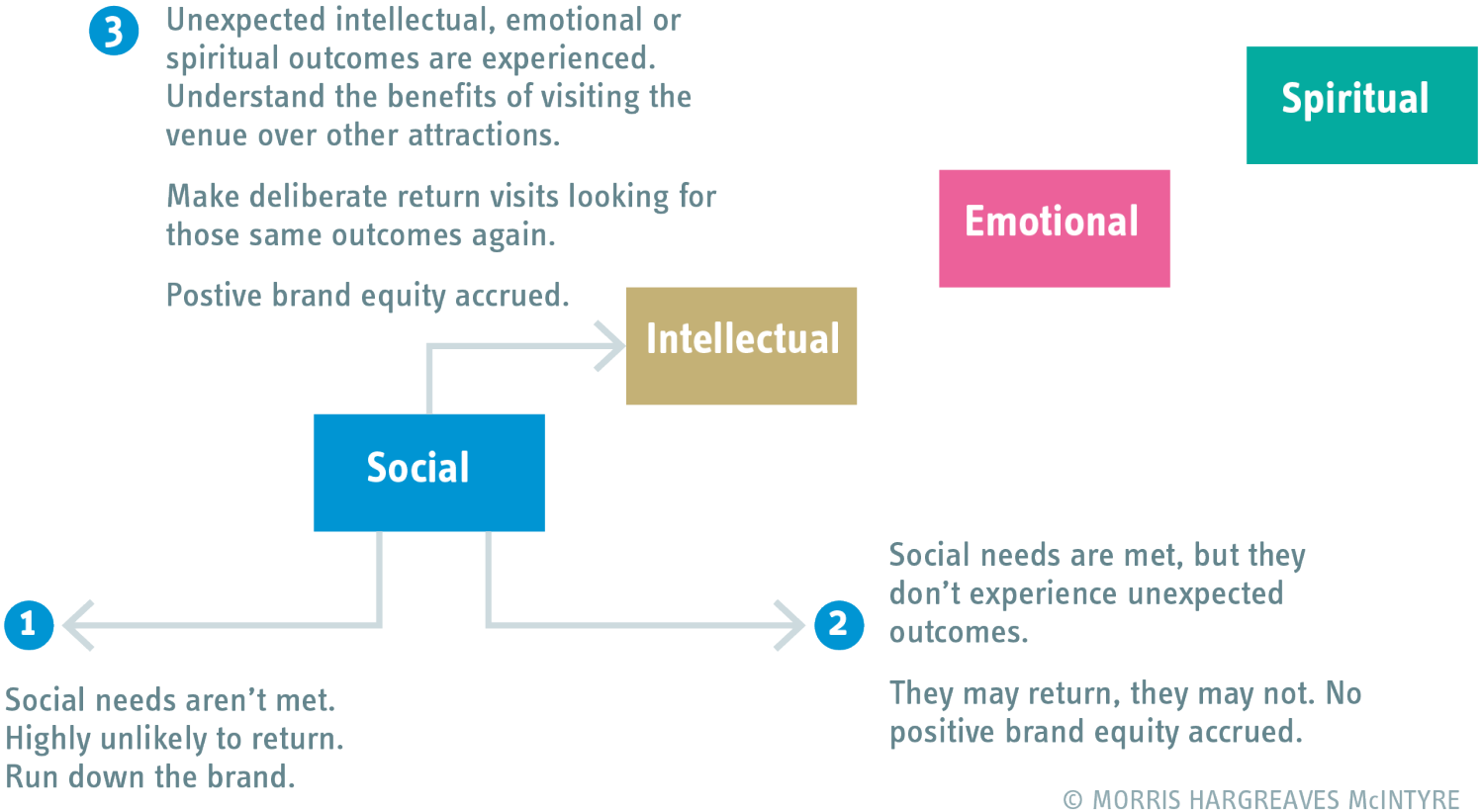


% point difference
from main motive

0%	Spiritual
-1%	Emotional
-5%	Intellectual
+6%	Social

[Base: 245]

Delivering unexpected visitor outcomes



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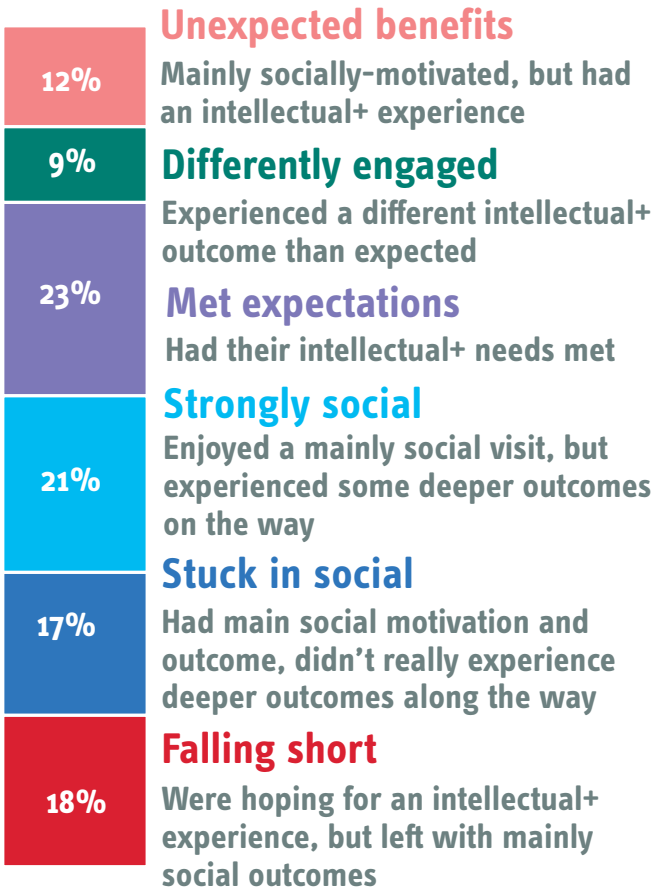
Almost one fifth were falling short



[Base 243]

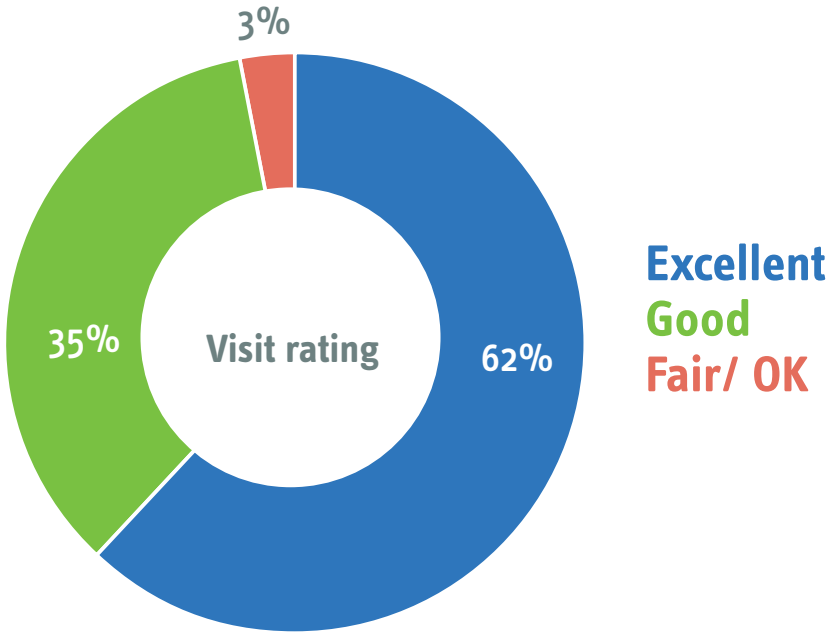
Staff welcoming and passionate

70% of respondents interacted with staff.

Of those:

- 94% agreed staff were welcoming
- 91% agreed staff were knowledgeable
- 85% agreed staff communicated pride and passion for The Alamo

Alamo rated highly and likely to be recommended



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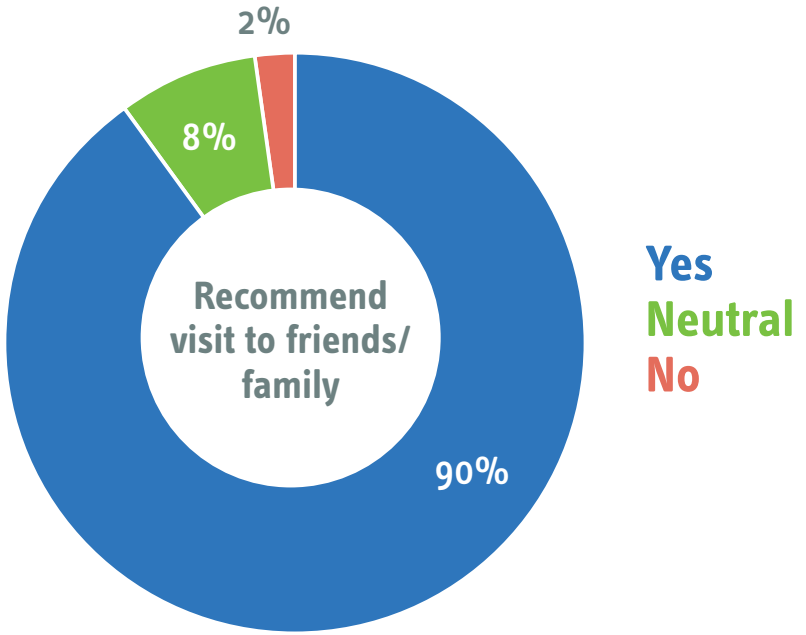

[Base: 249]

Future engagement with visitors

[Base: 249]

Thank you!

morris
hargreaves
mcintyre