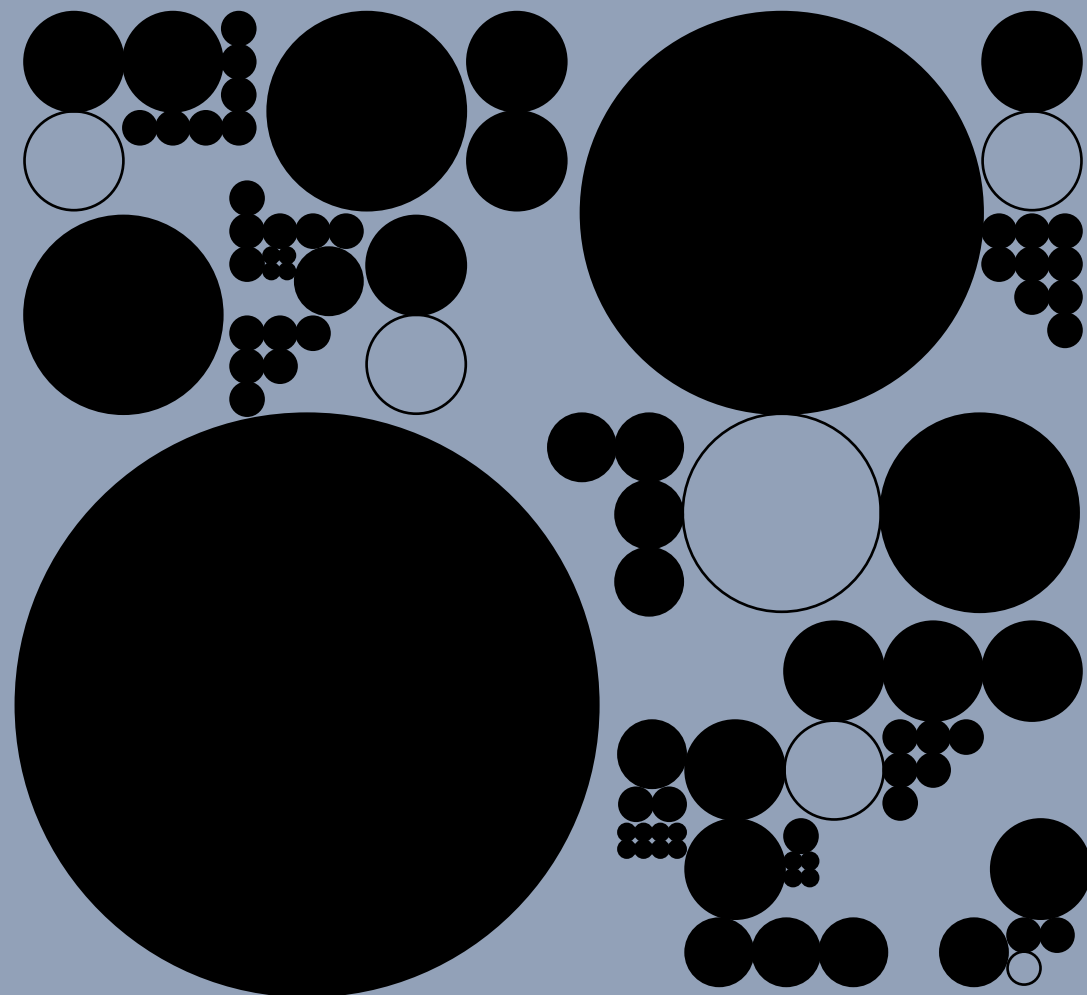


# Free Admission to Museums in Berlin: perceived barriers, values and effects by and within the audience

Results of a survey of 7,500 interviews in 15  
state-funded museums (July 2021 to June 2022)

Dr. Britta Nörenberg

London, May 09, 2023



## Institut für Kulturelle Teilhabeforschung | Institute for Research on Cultural Participation

- Independent, publicly funded research institute in Berlin
- Founded in 2020 under the umbrella of the state-owned **Foundation for Cultural Education and Cultural Consulting** [Stiftung für Kulturelle Weiterbildung und Kulturberatung | SKWK]
- **Research on (non-)visitors and strategic audience development** of cultural institutions:
  - **Population surveys** on cultural activities and visits
  - Project management and quality assurance of **KulMon® visitor research system**
  - Accompanying research and **evaluations of funding programs and pilot projects**, e.g. "Admission-Free Museum Sunday"



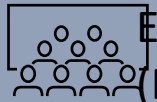
Provides cultural institutions, organizations and cultural administration with comprehensive data-based knowledge on cultural participation, its general framework as well as its barriers and drivers.

## Dr. Britta Noerenberg | academic background



Film scholar

2007-2019 Head of Market Research and Statistics  
at the German Federal Film Board (FFA) / Member of



European Film Agency's' Research Network  
(European Commission)



Since 2020 Senior Research Manager at IKTf with a  
focus on accompanying research and evaluations of funding



## „Museum Sunday“ (EFS) in Berlin | free admission to museums

- Cultural policy guidelines with focus on cultural participation measures
- „Museum Sunday“ started as a pilot in the summer of 2021
- First Sunday every month museums in Berlin open their doors to the public free of charge.
- The aim of the initiative is to make museums more attractive and easier to access for the general public by eliminating the entrance fee.
- Next to the traditional cultural audiences and tourists, the target groups are:



- ✓ Local population
- ✓ Families and kids
- ✓ Students
- ✓ people with a migration background or immigrant history

## „Museum Sunday“ (EFS) in Berlin | free admission to museums project management and accompanying campaign

- 76 museums participate in programme
- Website: [Museums Sunday Berlin \(museumssonntag.berlin\)](http://museumssonntag.berlin)
- Special programming/offers on site
- Quarterly meetings in two groups:
  - communication/marketing
  - outreach/programming
- Accompanying campaign by Bureau N offering marketing tools to the museums for their online and offline marketing such as digital disruptors, online and a print package
- Accompanying monthly visitor research by IKTf



# Visitor Research of Museum Sunday | Methodological profile



Museums:

selection of 15 participating state-funded museums:

*Berlinische Galerie / Bröhan Museum / Brücke Museum / Kunsthaus Dahlem / Domäne Dahlem / Georg-Kolbe-Museum / KW Institute for Contemporary Art / Märkisches Museum / Museum der Dinge / Museumsdorf Düppel / Nikolaikirche / Schwules Museum / Werkbundarchiv / since 01.01.2022 Global Berlin at the Humboldt Forum*



Methodology:

Mix of CAPI/CAWI

1-2 interviewers per location, 4 tablets per interviewer

self-completion via tablet QR code, random sampling



Questionnaire / Languages:

Identical questionnaire in all facilities, about 30 questions, optionally in German and English, possible variation of font size



Basic population:

Museum visitors on admission-free museum Sundays aged 16 and over



Sample:

random sample

Free Sunday 7,576 cases

KulMon® 5,331 cases



Survey duration:

10-15 minutes



Survey period:

1 year, 12 waves

July 2021 to June 2022

# Comparative Dataset | Continuous Visitor Surveys via KulMon®

## Survey Method

- **Standardized samples** suitable for the cultural institution
- **Face to face interviews** conducted by professional survey institute
- Professional **data cleansing**

## Berlin

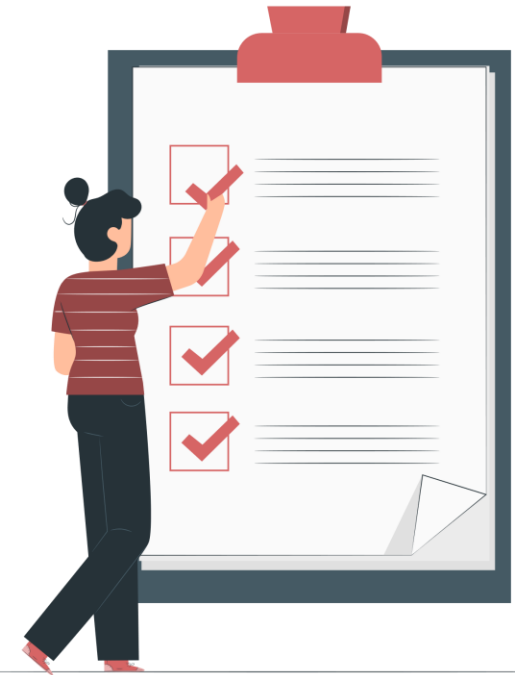
Currently **54** participating institutions

## Germany

expansion throughout Germany with more than 60 additional venues starting in 2024

## Catalog of questions

- **75** different questions (plus in-depth questions)
- Standardized mandatory **core questions**
- Optional **additional questions** for specific information needs of the institutions.
- **Point system** for calculating the maximum number of questions in the questionnaire
- The question catalog **grows continuously** according to the current needs of the institutions





## Accompanying campaign contributes significantly to the success of Museum Sunday



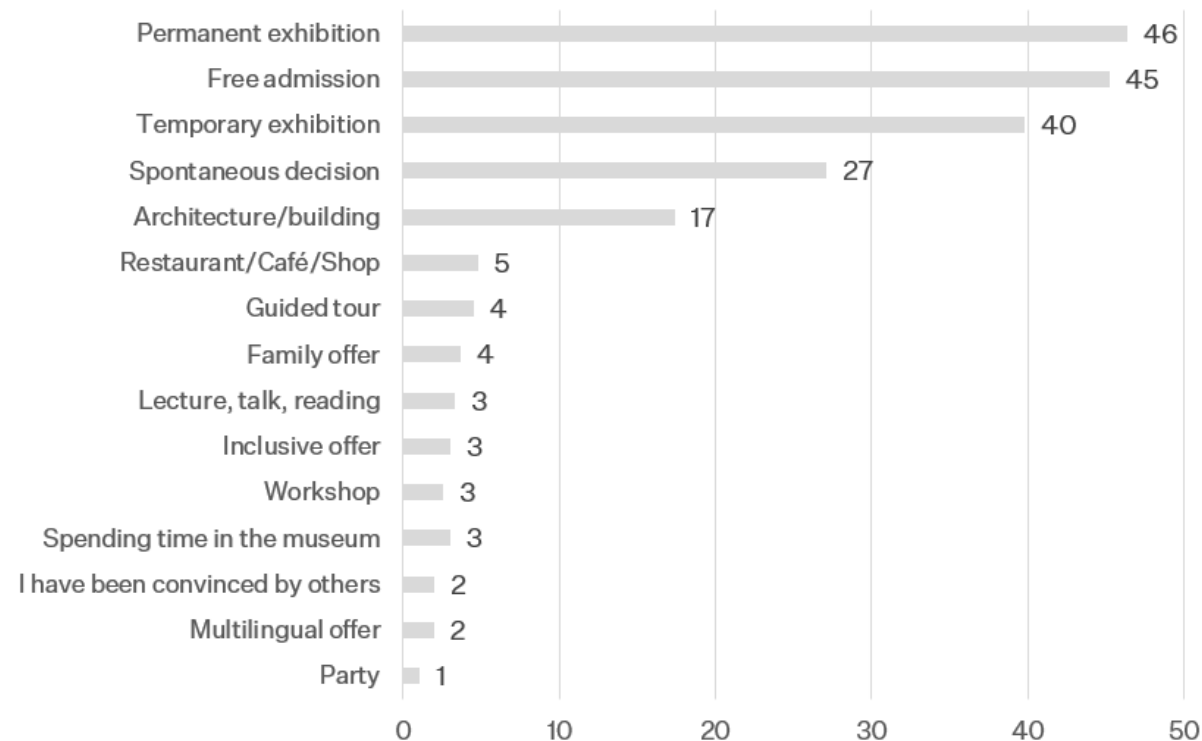
Design: Büro Bum Bum.com, Illustration: Sany

- Museums attract more first-time and repeat visitors than they would otherwise be able to, especially locals from Berlin.
- The accompanying campaign is a key success factor. It was noticed by almost every second visitor (54 per cent).
- Almost all visitors who were familiar with the campaign stated that they liked it (92 per cent).
- Just under a third felt "definitely" encouraged to visit the museum as a result of the advertising.
- Broad impact of the campaign as it was equally well received and positively evaluated by a wide range of various population groups.



## Potential of event-oriented additional programmes not yet fully utilised during first year

Various reasons for visiting the museum on an admission-free Sunday  
(in per cent)



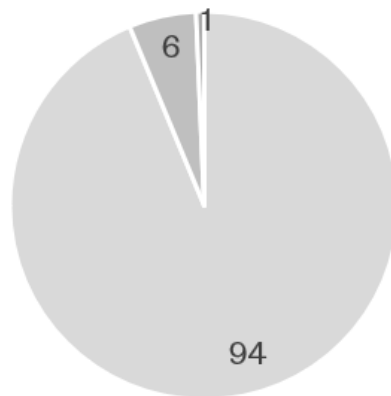
Source: Museumssonntag (IKTf 2022)  
n = 7,576

- Due to Covid19, hardly any audience development measures could take place at times.
- If museums offered special programming on Museum Sundays – only 14 per cent of visitors knew about it.
- The comparatively low importance of these “specials” as an explicit reason to visit contrasts with a strong demand on site (26 per cent).
- Thus the potential of these incentives was not utilised:
  - 13 per cent of those who knew about the additional offers came mainly for this reason
  - Three quarters of visitors were at least *satisfied* with this offer.

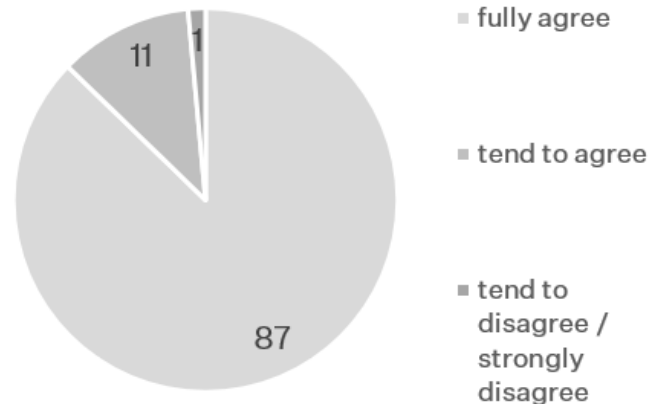
# Museum Sunday brings about a positive image change for Berlin's museums

Attitudes towards and assessment of admission-free Sundays overall (in per cent)

"I generally like the idea of admission-free Sundays."



"Admission-free days at museums generally make the cultural offerings in Berlin more attractive."

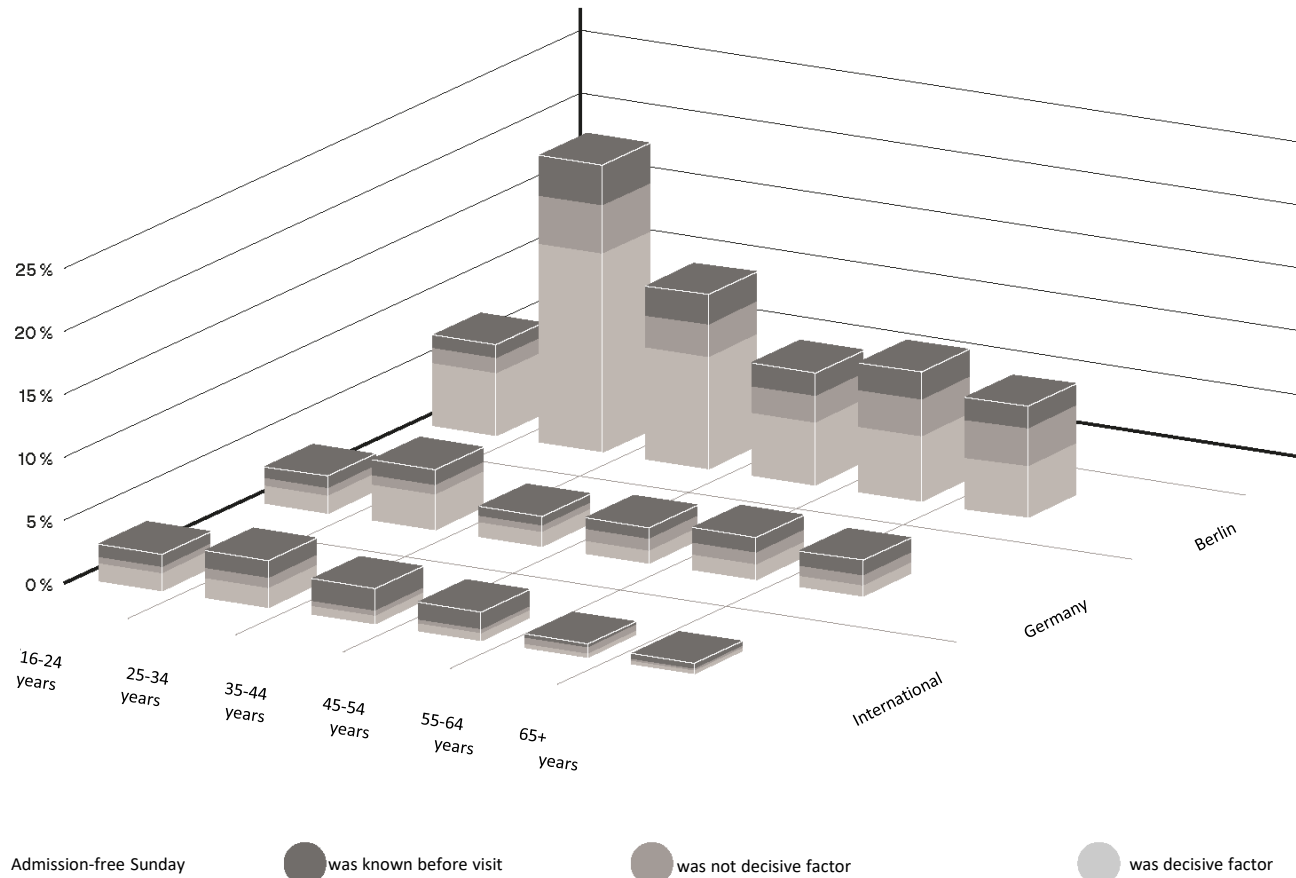


Source: Museumssonntag (IKTf 2022)  
n = 7,463 (left), n = 7,112 (right)

- Nine out of ten visitors are in favour of admission-free Sundays and think they make Berlin's cultural offerings more attractive.
- 90 per cent of visitors say that admission-free Sundays make the particular museum they visit more appealing to them.
- For two thirds of the respondent, admission-free Sundays have increased interest in offered exhibitions.
- For just under two thirds of visitors, Museum Sundays create a stronger bond with museums.

# Audience of Museum Sundays mainly young and from Berlin

Importance of various influencing factors on visit in relation to each other (in per cent)



Source: Museumssonntag (IKTf 2022)  
n = 7.502

- Main visitor group of Museum Sundays: 25- to 34-year-olds and 35- to 44-year-olds from Berlin
- People with a history of immigration were also reached more than usual, focus on non-EU countries.
- Museum Sundays still attracted mainly visitors with a high level of formal education.
- However, Museum Sunday often reached people who had never been to a museum in Berlin before.
- Amount of first-time and repeat-time visitors roughly the same as usual, but other social groups among first-time visitors.
- Financially vulnerable groups were not reached to an increased extent.

# Different lifestyles among respondents help understand audiences (even) better

## Lifestyles according to Gunnar Otte

		← Degree of Modernity →		
		Traditional/ <u>biographical</u> closure	<u>Partly modern</u> / <u>biographical</u> consolidation	Modern/ <u>biographical</u> openness
← Standard of Living →	High	<u>Conservative</u>	Liberal	Innovative
	Medium	<u>Conventionalist</u>	" <u>Middle of the Road</u> "	Hedonist
	Low	Traditionalist	Home- <u>Centered</u>	Entertainment <u>Seekers</u>

# People who don't normally go to museums are increasingly being reached

## Share of lifestyles in audience (in per cent)

		← Degree of Modernity →		
		Traditional/biographical closure	Partly modern/biographical consolidation	Modern/biographical openness
← Standard of Living →	High	<u>Conservative</u> KulMon® 4 % EFS 2 %	Liberal KulMon® 19 % EFS 14 %	Innovative KulMon® 35 % EFS 32 %
	Medium	<u>Conventionalist</u> KulMon® 3 % EFS 2 %	"Middle of the Road" KulMon® 11 % EFS 11 %	Hedonist KulMon® 16 % EFS 21 %
	Low	Traditionalist KulMon® 2 % EFS 2 %	Home-Centered KulMon® 5 % EFS 6 %	Entertainment Seekers KulMon® 6 % EFS 9 %

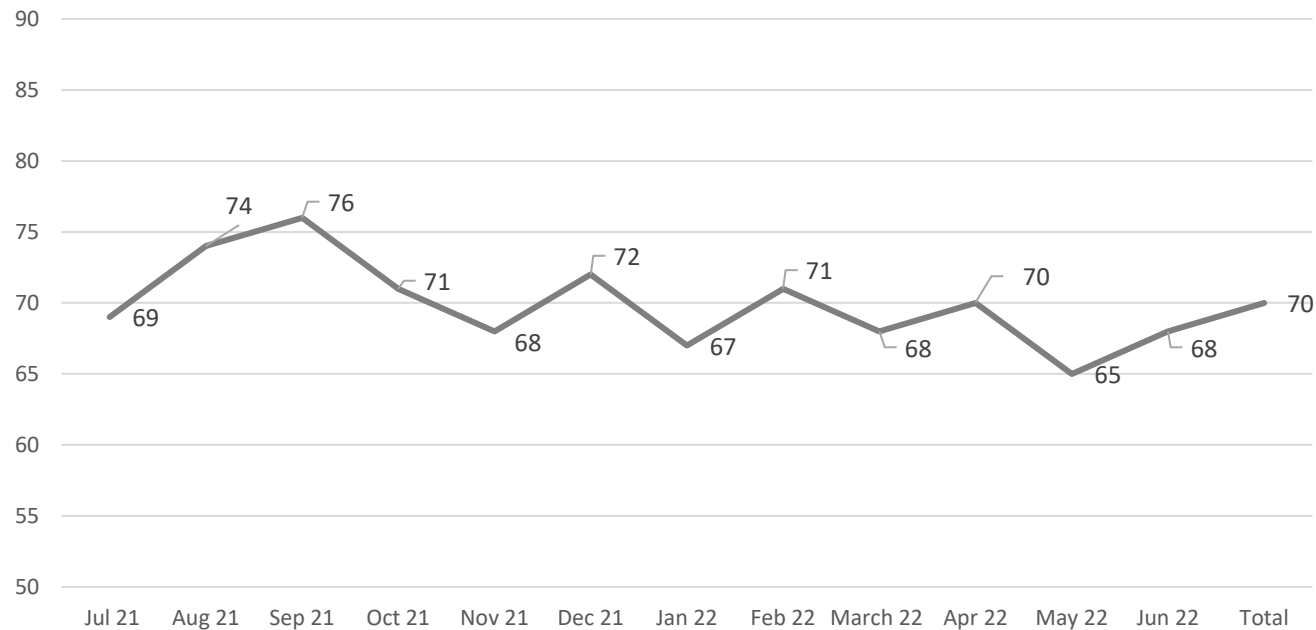
Source: Museumssonntag (IKTf 2022)  
 EFS n = 7,576 , KulMon® = n = 5,331

## Audience of Museum Sundays (EFS):

- Traditional cultural audience less strongly represented as in regular museum audience.
- Proportion of innovative and liberal visitors on Museum Sundays 46 per cent vs. KulMon 53 per cent.
- Significantly more occasional or non-visitors have been reached.
- Proportion of hedonists, entertainment seekers, home-centered people on Museum Sundays 36 per cent vs. KulMon 27 per cent.

# Free admission is main reason for a visit on Museum Sundays

## Free admission as a reason for visiting museums over time (in per cent)



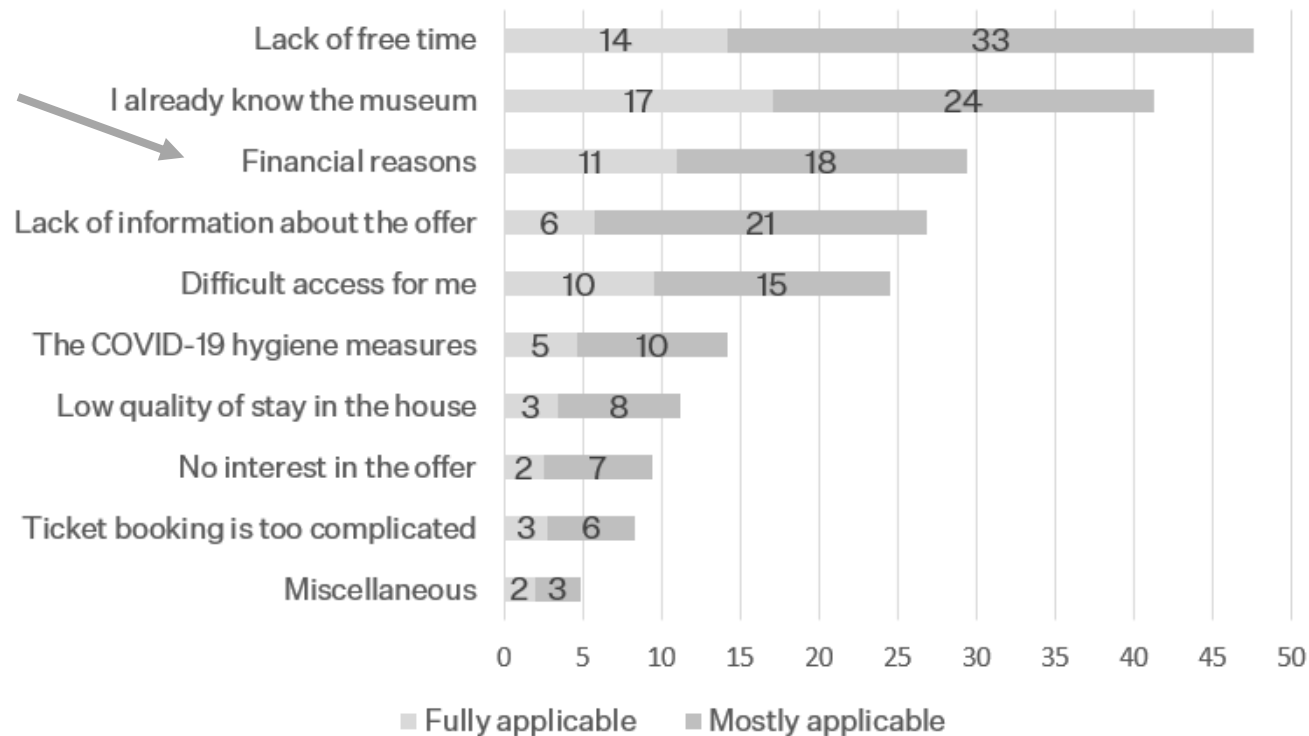
Source: Museumssonntag (IKTf 2022)  
n = 5,911

- 8 out of 10 visitors, who knew about free admission, cite it as main reason for visiting a museum on a Museum Sunday
- It is also the main reason for a visit for just over half of all visitors.
- Comparative studies arrive at significantly lower values (10-20 per cent)
- Importance of free admission for the decision process largely stable over time
- However, clear cannibalization effects of free Sundays in same museum; no negative effects on museums charging admission fees
- But: The following applies to all visitors who highly value free admission in their decision process:
  - ✓ *One third finds regular admission fees reasonable.*
  - ✓ *Although, one third do not know the ticket price.*
  - ✓ *Three quarters say that financial barriers do not prevent them from visiting a museum.*



## Free admission significantly improves perceived price-performance ratio

### Barriers to visiting the museum (in per cent)



Source: Museumssonntag (IKTf 2022)  
n = 219-3.605

- Majority of visitors (54 per cent) want to spend cost savings in same museum or elsewhere.
- Absolute cost saving is not the main reason for attending Museum Sunday.
- Price-performance ratio mixes financial, material and psychological motives:
  - ✓ Value for free (reg. ticket as price anchor)
  - ✓ Added value through extended consumption
  - ✓ Bargain effect
- Free admission primarily (only) improves perceived cash value of museum's exhibitions / programmes.
- This applies to about 4 out of 5 visitors.
- According to their own statement, only 22 per cent of the respondents are crucially dependent on free admission.

Further information on research project /  
report (in German only) at:  
[iktf.berlin/publikationen/](http://iktf.berlin/publikationen/)



Thanks you for the listening! Any  
questions?

