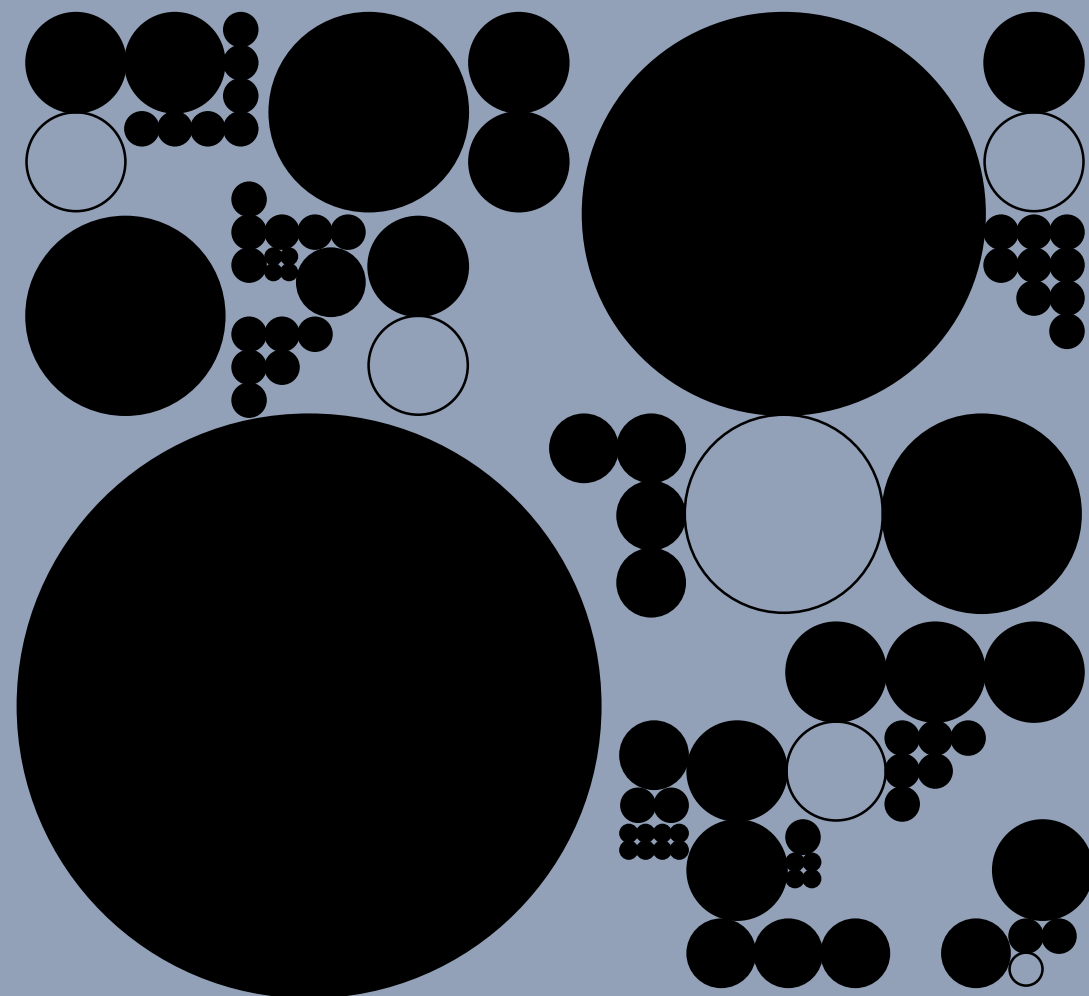


Free Admission to Museums in Berlin: perceived barriers, values and effects by and within the audience

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

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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.

„Museum Sunday“ 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
- Each 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“ in Berlin | free admission to museums project management and accompanying campaign 2021/2022

- 76 museums participate in programme
- Website: [Museums Sunday Berlin \(museumssonntag.berlin\)](https://museumssonntag.berlin)
- Most venues offer special programming on site.
- Accompanying overall marketing campaign by Bureau N, plus specific marketing tools for all museums for their individual online and offline marketing, such as digital disruptors, online and a print package
- Accompanying monthly visitor research by IKTf during the first year at 15 participating state-funded museums



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 venues, about 30 questions, optionally in German and English, possible variation of font size



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

Accompanying campaign contributes significantly to the success of Museum Sunday

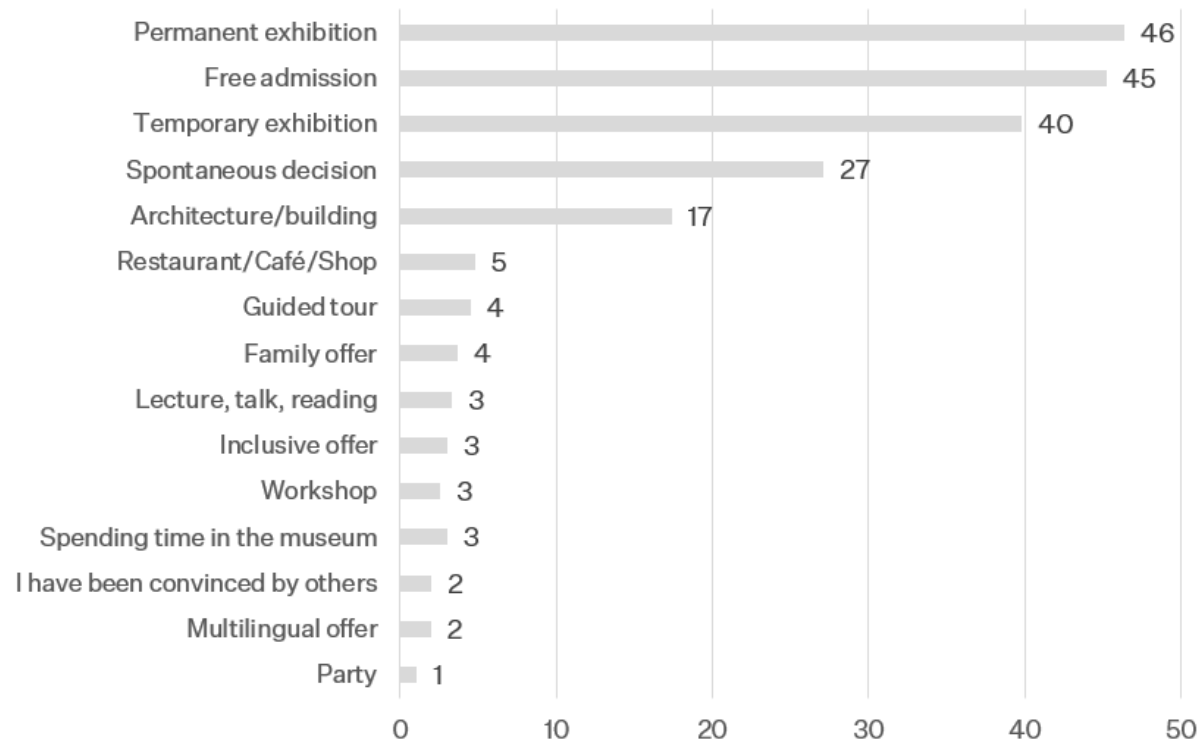


Design: Büro Bum Bum.com, Illustration: Sany

- Museums attract more first-time and repeat visitors than on a regular weekend, especially locals from Berlin.
- The accompanying campaign is key to success of Museum Sunday. 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)

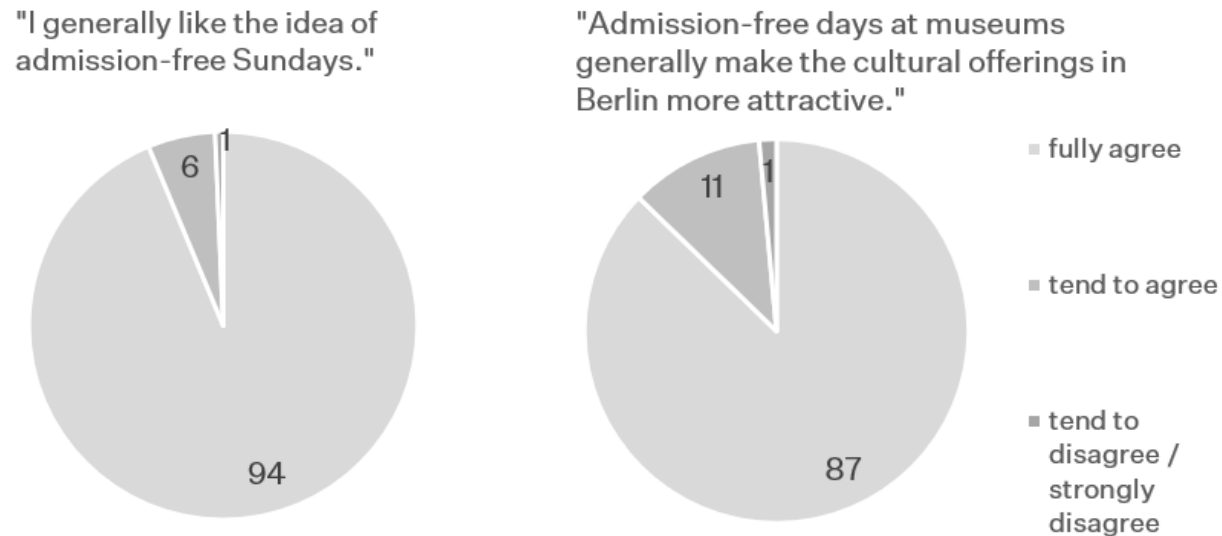


Source: Eintrittsfreier Museumssonntag in Berlin
(Free Admission on Museum Sundays in Berlin) (IKTf 2022)
n = 7,576

- 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 utilized:
 - 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 Sundays bring about a positive image change for Berlin's museums

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

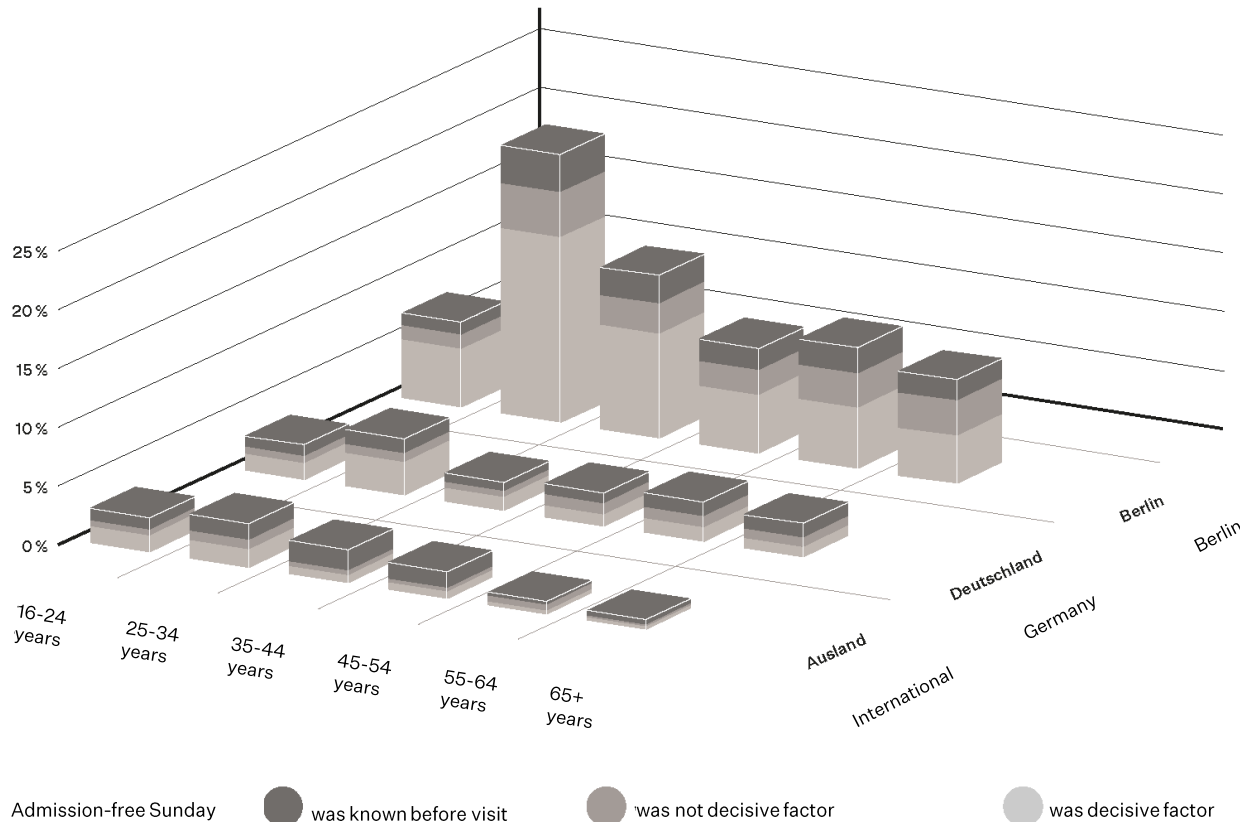


Source: Eintrittsfreier Museumssonntag in Berlin
(Free Admission on Museum Sunday in Berlin) (IKTf 2022)
n = 7,463 (left), n = 7,112 (right)

- 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: Eintrittsfreier Museumssonntag in Berlin
(Free Admission on Museum Sundays in Berlin) (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 visitors roughly the same as on regular weekends, but other social groups among first-time visitors.
- Financially vulnerable groups made no difference between Museums Sundays and regular weekends, thus eliminating the fee did not increase their interest in visiting a museum.

Different lifestyles among respondents help understand audiences (even) better

Lifestyles according to Gunnar Otte

		← Degree of Modernity →		
		Traditional/ <u>biographical</u> closure	Partly modern/ <u>biographical</u> consolidation	Modern/ <u>biographical</u> openness
← Standard of Living →	High	<u>Conservative</u>	Liberal	Innovative
	Medium	<u>Conventionalist</u>	"Middle of the Road"	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 on Museum Sundays and on regular weekends (KulMon®) (in per cent)

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

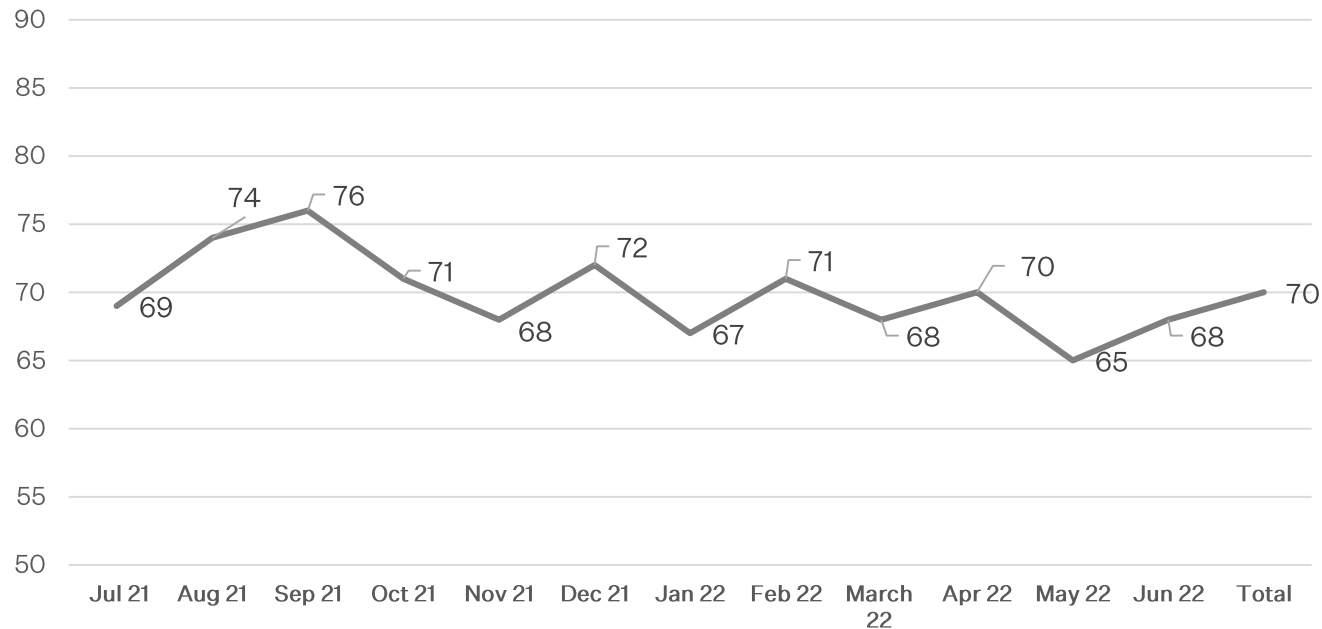
Source: Eintrittsfreier Museumssonntag in Berlin
(Free Admission on Museum Sundays in Berlin) IKTf 2022)
Museum Sunday n = 7,576 , KulMon® n = 5,331

Audience of Museum Sundays:

- Traditional cultural audiences less strongly represented on Museum Sundays compared to regular weekends (KulMon®).
- 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 on Museum Sundays.
- 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)



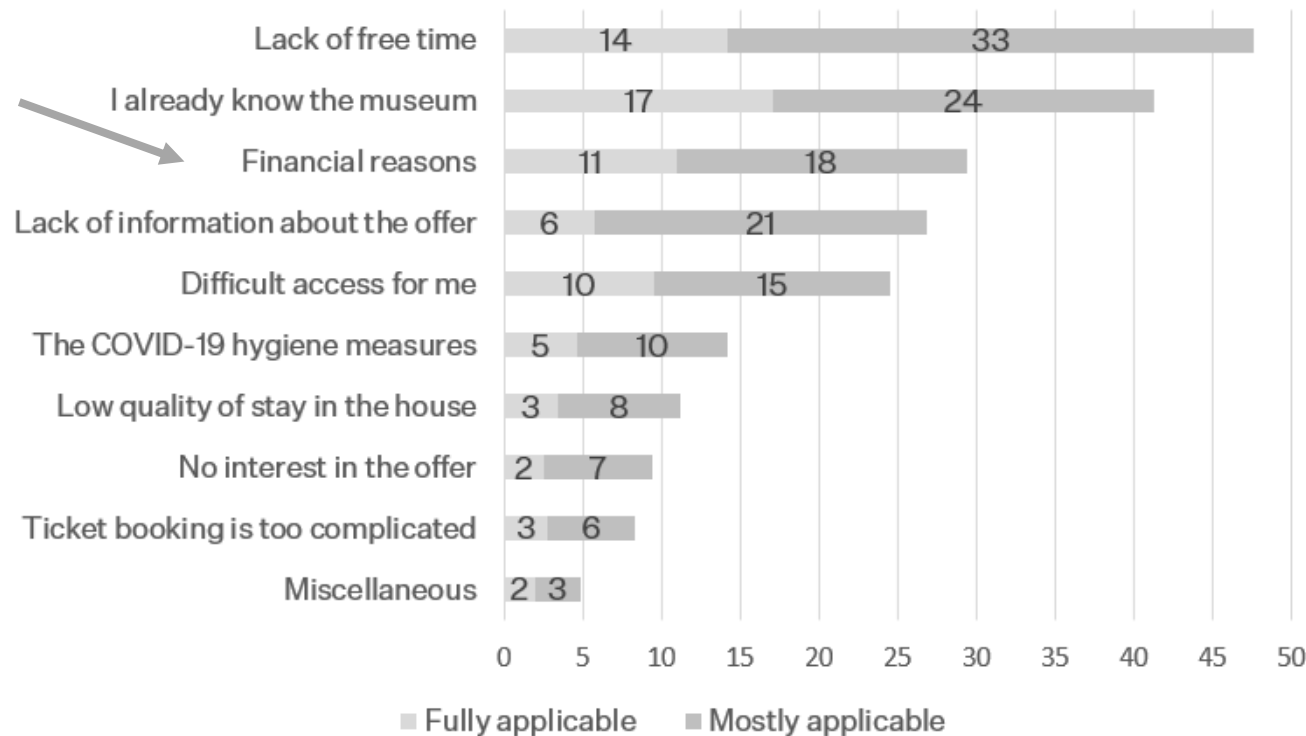
Source: Eintrittsfreier Museumssonntag in Berlin
(Free admission on Museum Sundays in Berlin) (IKTf 2022)
n = 5,911

- 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 making process largely stable over time
- However, clear cannibalization effects of Museums 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 making 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: Eintrittsfreier Museumssonntag in Berlin
(Free admission on Museum Sundays in Berlin) (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 Sundays.
- 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 and the
complete report (in German only)
can be found at
iktf.berlin/publikationen/

