

## Tri-State Coalition for Historic Places Audience Study Executive Summary

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The Institute for Learning Innovation, an Annapolis, MD-based non-profit research and evaluation organization, was contracted by the Tri-State Coalition for Historic Places to conduct audience research in support of a project designed to encourage visitation to member sites of the Coalition. The goals of this audience survey are to identify the following:

- demographic characteristics of potential visitors to the Philadelphia area
- sights people want to see when they visit the Philadelphia area
- activities people want to do when they visit the Philadelphia area
- content and thematic interest and expectations of these potential visitors
- interpretive media that appeals to potential visitors

The Institute conducted semi-structured interviews with people from a diverse population of tri-State residents and visitors in the summer of 2002 at the Independence Visitor Center, Valley Forge National Historical Park, Franklin Mills Mall and Pennsbury manor. Institute researchers also conducted phone interviews with concierges from local hotels and tour operators from local tour agencies. Institute researchers then coded, entered, analyzed and interpreted the data.

Institute researchers interviewed 105 individuals during the evaluation. Of those, 63% were female and 37% were male. Over one half of visitors were aged 40 or above; 16% were under 20. Almost one quarter of interviewees were estimated to be in their 40s. Interviewees were primarily Caucasian (87%) with 7% African-American and 4% Hispanic. Over three quarters of interviewees were part of a family group, and 44% of the individuals interviewed were part of a family group with at least one youth 18 or under.

Interviewees came from eighteen states and five countries. The greatest number of interviewees came from the Pennsylvania, New York and New Jersey region (63%), with Pennsylvania claimed by 38% as home residence. Thirty-four percent of those reporting zip codes came from the 190/191 area.

Ninety-seven percent of interviewees said they had visited historic sites at least once in the last two years. Almost three quarters of interviewees said that they visited historic sites from three to six or more times in the last two years. The most common place where people found out about historic sites was "internet or web sites" (40%) while word-of-mouth was mentioned by 27% of the interviewees.

During the interview, interviewees were presented with seven themed tours and descriptions and asked to rank them in order of preference from most to least interesting. The seven tours and descriptions are below:

- **Great Stuff!!** See the beautiful furniture and furnishings in several historic Philadelphia area homes.
- **Great Architecture** See the wonderful architecture of the Philadelphia region at several historic homes and sites.
- **Beautiful Gardens** Stroll through some of the loveliest historic gardens in the Philadelphia region.
- **African American History** Learn about the contributions of African Americans to the history of the region.
- **Fun for the Family** Learn about history while you have fun. Take your family on an outing of activities and history as you visit historic sites in the Philadelphia area.
- **Revolutionary War Sights** Visit several historic sites that show the Philadelphia region's role in the Revolutionary War.
- **The Quirky and Famous** Find out about the famous and not quite so famous people of Philadelphia by visiting historic sites and places where they lived and worked.

*Revolutionary War Sights* received by far the most first place rankings (31%), with *Fun for the Family* with 20%, next followed by *Beautiful Gardens* (12%), *Great Architecture* (11%), *The Quirky and the Famous* (11%), *Great Stuff* (8%) and *African American History* (5%).

After ranking the tours, interviewees were asked to indicate whether they like the theme "a lot," "somewhat," "not much" or "not at all." The results of this rating corresponded closely to the tour rankings. Sixty-one percent of interviewees indicated they liked *Great Architecture* "a lot;" 57% liked *Revolutionary War Sights* "a lot;" 55% indicated the same for *Beautiful Gardens*, as did 52% for *The Quirky and the Famous*. Forty-five percent said they liked *Fun for the Family* "a lot."

When rankings are examined by ethnic and racial identity, over one half of African Americans chose African American History as their first choice for tours. Conversely, only one Caucasian chose that tour as first. Likewise, when asked to rate their interest level, all of the African Americans responding indicated that they liked that tour “a lot.” Only 9% of Caucasians said they liked that tour “a lot.”

Institute researchers also asked interviewees to consider whether five additional themes were of interest to them. These themes were as follows:

- Coming to Philadelphia: Immigrants, Migrants and Ethnic Life
- Machines, Steel and the People Who Made Them
- Famous Women of Philadelphia
- The Sounds of Philadelphia: Coltrane, American Bandstand, Mario Lanza and All the Rest
- Great Books, Great Authors

Four of the themes were quite popular with interviewees, each garnering over 80 of interviewees saying they liked them “a lot” or “somewhat”: Coming to Philadelphia (86%), Famous Women of Philadelphia (83%), The Sounds of Philadelphia (81%) and Great Books, Great Authors (80%). Machines, Steel, and the People Who Made Them gathered just 58% of interviewees indicating they liked it “a lot.”

Researchers asked interviewees, “What would make your experiences at historic sites and places more interesting and enjoyable so you might want to visit the sites more often?” Responses were in the following categories:

- Better guides (38%)
- Structure of the experience (28%)
- Access/Transportation/Signage/Marketing (17%)
- Better and more information
- More hands-on activities (12%)
- Logistics (9%)

Institute researchers asked interviewees “What should the Coalition be sure to avoid in making the tours a success?” Thirty-eight percent of interviewees mentioned the quality of the guide, 26% commented on too much reading of exhibit labels and 18% mentioned problems with crowd control.

Researchers questioned interviewees to understand what factors would influence them to go, or not to go, to an historic site. The amenity that seemed to make the most difference was related to food, with 58% of interviewees saying they would only go if nearby food were available. Public transportation was a factor for almost one-third of interviewees. About a third of those surveyed indicated that free parking would make a difference, but many of those qualified their answer by saying that they would go but resented having to pay admission and parking at an attraction and hoped that that would not happen in this instance.

Interviewees were asked if they would be willing to drive around Philadelphia to get to these sites. Fifty-five percent said “yes” and 42% said “no.” Some said that they would be willing to drive but would also take a shuttle bus (16%). Researchers asked interviewees “What is the maximum length of time you would want to travel to get from site to site?” Forty-four percent said thirty minutes was the maximum they would want to travel, and 24% said that fifteen minutes was the most they would want to travel.

Institute researchers presented interviewees with nine different ways of participating in historic site experiences, as listed below:

- Walking tours to interesting historic sites
- Driving tours to nearby interesting historic sites
- Taking a bus tour to interesting historic sites
- Visiting well-known historic places like the Liberty Bell and Valley Forge
- Visiting less well-known, out-of-the-way historic sites
- Taking guided tours at historic sites
- Taking self-guided tours at historic sites
- Talking with or watching living history or costumed characters at historic sites
- Listening to an audio tour of the site

Interviewees were asked to indicate whether they liked that experience at lot, somewhat, not much or not at all. “Visiting well-known places” appeared to be the favorite activity with 81% of people ranking it “a lot.” “Walking tours” and “Talking with living history characters” were next with 70% of interviewees ranking them “a lot.” The next closest experience was “Taking guided tours” with 63% of people ranking it “a lot.” The activity that had the lowest rating (37%)

for “a lot” was “Driving tours.”

Eighty-two percent of visitors asked said that they had used audio tours before. Seventy-six percent said they had used a tape, 20% had use a wand, 11% had used a CD and one person had used a key that was inserted into each exhibition element to hear the narration. Interviewees were asked if they would be willing to use an audio recording again or if they had not used one, would they be willing to try one. Of those responding 66% said they would use one, 20% said maybe and 14% said they would not.

To assist in helping to understand the kinds of experiences that visitors desire, concierges from four hotels and tour operators from four agencies were interviewed by phone by Institute researchers. Concierges were asked to comment on the kinds of activities that adults, adults with families and seniors ask about most often. Their responses indicated that historic sites are among the most popular requests.

Researchers asked concierges what they felt were the most important pieces of information that people want to get as they determine what activities to do. Location seemed to be an important factor, as most of the visitors to hotels have flown into town and do not have a car, while others have driven into the city and do not want to drive further. Those who are willing to drive only want to drive a short distance, according to the concierges. When asked if visitors appeared concerned about the cost of an activity, concierges commented that admission prices did not seem to be much of a concern with tourists. Tourists were more concerned with the location of, and transportation to the activity.

Researchers also asked tour operators to comment about the length of time visitors liked to spend at a site, how many sites they like to visit in a half day, and how many sites in a full day. Respondents were in agreement that no tour at a site should last more than one hour at the most and preferably less; there was no clear consensus in the number of sites visitors liked to visit.

Both tour operators and concierges were asked to rate several kinds of activities that people might do relating to visiting historic sites. Both groups were in unanimous agreement that their clientele liked visiting well-known historic places “a lot.” They were in almost complete agreement that tourists liked bus and windshield tours “a lot” as well. From their perspective, guided tours were also something that visitors liked “a lot”—more than self-guided tours.

Institute researchers asked both concierges and tour operators to rate several proposed tours and tour themes according to how much they think visitors would be interested. The tour that received almost unanimous agreement that visitors would like it “a lot” was *African American History* with three concierges and four tour operators suggesting that visitors would like it “a lot.” One tour operator commented that “Philadelphia is the number one city for African American history.” Another tour operator commented that it is a “growing topic of interest.”

*Fun for the Family* was indicated by all four concierges and one tour operator as being “a lot” of interest to visitors. Another tour, *Revolutionary War Sights*, received strong support, and as one tour operator said, “This would be heavily attended because of the military reunions. I could start selling them today.” One tour operator thought *Beautiful Gardens* would be quite popular.

Both concierges and tour operators were asked to provide their reactions to an additional five historic themes that might be of interest to people. None of the themes showed interest from both groups, although three tour operators thought people would favor *Coming to Philadelphia*, with one operator commenting that “there would be a market for this.” Likewise three tour operators felt that *Sounds of Philadelphia* would also be of interest.

Institute researchers questioned both concierges and tour operators for any factors that the Coalition should keep in mind as it develops tours. One tour operator summed up what he thought should be the general approach in the design of tours: “Raise the bar. Make the tours better.” Specific suggestions from tour operators and concierges included getting someone outside the site to design the tour, making the tour short, and making sure there are good stories to tell. The overall quality of the guides’ presentation was the other element of the tour that was mentioned often. As one tour operator said, “The guide can make or break a tour.” The guide needs to “have a good presentation” and be “a good storyteller.”

Concierges stated that brochures and familiarization tours would be of greatest help to them in providing information about proposed Coalition tours. Tour operators also stated that familiarization tours, brochures and information sheets would all be useful to them in helping visitors make decisions about choosing a packaged tour.

Researchers asked tour operators “could you tell me the price point you would be willing to pay for visiting three to five sites?” There was no consensus among the four and their comments ranged from \$1 to under \$10.

## Conclusions

In many ways this project led by the Tri-State Coalition for Historic Places revolves around the key concept of niche marketing and targeting specific audiences. As Institute researchers examined the data and the comments from interviewees, it became clear that there are several different audiences represented by the people in this survey. To be successful in this project, the Coalition must identify historical experiences that appeal not to every resident and potential visitor to the region, but to specific groups of people who have an interest in a specific topic.

Smaller institutions, like most of those in the Coalition, have a difficult time successfully competing with larger institutions that often target broad cross-sections of potential visitors. The development of audiences for these Coalition sites would likely be more successful when based on matching the sites' interpretive and visitor attraction strengths with audiences' corresponding interests.

To reach these audiences requires not only building an understanding of people's interests, but also forging coalitions with the convention bureau and relevant interest groups, creating a marketing plan that includes targeting marketing and an attractive internet presence, and adopting a mindset of flexibility and customization. There are a number of activities, conventions or events in which it would make sense to organize a group of sites into a specific relevant theme, create a customized brochure (perhaps as a desktop publication rather than a mass printing), post on a web site, and then promote the tour to those people who might come.

Two important results that emerged from the study and should affect tour design are the need and desire for both a bus tour and a family-oriented tour. Almost one half of people interviewed were staying overnight and had either driven or flown into the Philadelphia area from out of town. Many of these visitors do not have a car, or if they do have a car, they do not want to drive in the city. A tour design based solely on potential visitors who do drive will leave out a large number of the potential visitors to sites. It would seem to make sense to consider creating bus tours as well.

Just under one half (44%) of the interviewees were part of a family group comprised of at least one adult and one youth 18 years old or less. These family groups are looking for learning activities and are the same people who chose as their most interesting activity *Fun for the Family*, which was ranked first by 20% of interviewees (second only to *Revolutionary War Sights* with 31%).

#### Recommendations

1. Offer bus tours, shuttles or some other form of transportation as one element of the tour package.
  2. If appropriate, develop walking tours in downtown Philadelphia to accommodate those people who do not want to drive.
  3. Develop a family-oriented tour (e.g., *Fun for the Family*) to accommodate the many families looking for a fun, family-oriented history experience.
  4. Develop a Revolutionary War tour similar in concept to the *Revolutionary War Sights* proposed tour.
  5. Consider developing some or all of the following themes as tours targeted to specific audiences:
    - *Beautiful Gardens*
    - *Great Architecture*
    - *The Quirky and the Famous*
    - *African American History*
1. Provide assistance to sites in redesigning tours and interpretation where necessary.
  2. Enhance the quality of guides' presentation through training.
  3. Develop a tour that visits several sites and has the following elements:
    - a. Includes at least one well-known site
    - b. Can be done either on a bus or with a car
    - c. Sites are not more than 30 minutes apart
    - d. There is food nearby or on-site
    - e. If possible, provide the opportunity for visitors to walk on part of the tour if they desire.
    - f. Accessible and free parking
  1. Market the tour in ways that will reach the maximum number of people.
    - a. Seek the advice of a knowledgeable marketing professional to create and implement a marketing plan and to advise on the recommendations below.
    - b. Consider developing an approach that customizes tours and sites according to interests of groups meeting in the Philadelphia region.
    - c. Create a website that has links to participating sites and has links from appropriate sites that help market the tours.
    - d. Promote tours in regional newspapers and magazines; attempt to place feature stories as well.
    - e. Promote specific tours with target audiences. For example, when promoting a Revolutionary War tour, include magazines and websites used by buffs, reenactors and military and ex-military people. For an

- African American tour, include promotion with African American churches and service organizations.
- f. Ensure that directions and signage are easy to understand and use.
  - g. Develop familiarization tours for local tourism professionals.
  - h. Create attractive and informative brochures or information sheets for use by tourism professionals and for distribution through visitor centers and other appropriate outlets.
  - i. Consider implementing a system for capturing the email addresses of visitors to sites and those who inquire about Coalition tours. Those addresses can assist Coalition staff in marketing tours.
  - j. Solicit information from visitors to answer the question “How can we reach, or do a better job in reaching, other people like you (including clubs and organizations) who might have an interest in this site or topic?”
1. Create a ticket and admission policy that is reasonable and practical for both visitors and sites.
    - a. Remember that the experience at the site is all about value, not price. Value includes the whole experience, including quality of the tour, convenience of getting there, visitor services, food services, gift shop, etc.
    - b. Provide visitors with the opportunity to purchase tickets at each site they visit. That provides them with the option of going to, and paying for, only the sites they have interest in, or time for, visiting. It also eliminates the need for the Coalition to sell tickets and administer ticket distribution, commissions and all the other elements involved in ticket promotion sales.
    - c. Consider offering either a set price at each site or a discount at each site if people indicate they are visiting as part of the Coalition tour.