



SOLID STATE

INFORMATION DESIGN

The Museum of History & Industry

Market Positioning Research

Summary of Findings

Executive Overview

25 February 2008

Multilateral Research Activity



During December 2007 - January 2008 Solid State conducted:

- Extensive scripted telephone interviews with 298 Seattle-and-vicinity households
- Scripted telephone interviews with 50 current MOHAI members and 50 lapsed members
- Online survey of 403 greater Seattle “metroplex”-area households
- 102 sidewalk intercept interviews in downtown Seattle with “culture-disposed” adults visiting top urban attractions
- Five focus groups with recruited “culture-disposed” adults: MOHAI members, recent visitors / non-members, South Lake Union stakeholders & residents, heads of households with children, and heads of households with no children

Key Questions...

How aware of MOHAI is the general population?
How relevant is MOHAI?

What impressions do people maintain of the
Museum of History & Industry?

What priorities govern outside-the-household
outing selection?

What do people want from a museum experience
in general and MOHAI in particular?

Are there particular constituencies MOHAI should
target as keys to growth?

Key Questions... Short Answers



How aware of MOHAI is the general population? How relevant is MOHAI?	Awareness trends sharply downward among younger (sub-40) people and those who have moved here recently; for culture-aware adults, MOHAI is rarely on the Frye / Burke / Wing Luke / SAM / gallery circuit
What impressions do people maintain of the Museum of History & Industry?	A legacy/heritage information brand with few negative attributes, but not generally associated with vigor, dynamism or social interaction; impressions often based on ancient input (school trips) or hearsay
What priorities govern outside-the-household outing selection?	For the population at large: socializing or household-bonding opportunities, economy/value and accessibility. For more culture-disposed individuals: all this plus mind stimulation
What do people want from a museum experience in general and MOHAI in particular?	Portions of the general population will turn out for “tent pole” exhibits, but the culture-disposed core constituency wants overtly relevant history stories that challenge their minds on a regular basis.
Are there particular constituencies MOHAI should target as keys to growth?	Culture-disposed adult city dwellers who seldom put MOHAI on their radar today. The reflexive “families-with-children” target is a challenging one – and there are more fruitful targets of opportunity for MOHAI

Current Core Constituency

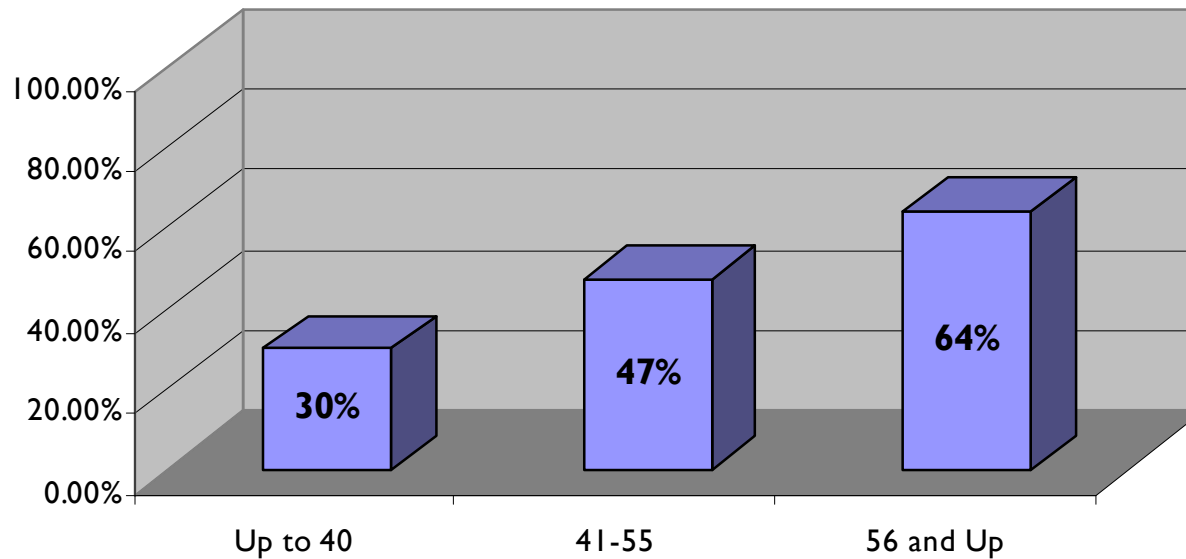
MOHAI members are older and have lived in Seattle longer

60% of our member sample has lived here at least 30 years compared to 33% of our general online sample

MOHAI members have different motives for joining MOHAI

Only 12% of MOHAI members join for the savings or benefits; for our general online sample, “admission savings” is the primary influencer to invest in a new museum membership (67%)

**Percentage of Each Age Group
That Has Heard of MOHAI (Online Survey)**



Outing Selection Priorities

- Value, ease of access, stimulating entertainment, relaxation, and factors that bring the family / household together.
 - ✦ 59% agree or strongly agree that “the price of gasoline lately means fewer recreation outings for my household”
 - ✦ 68% say “admission prices are a key factor” in selecting outing destinations
 - ✦ 72% of our focus group participants say easy parking is “very important”; 69% say easy public transit access is “very important”
- Children have moderate influence over their households:

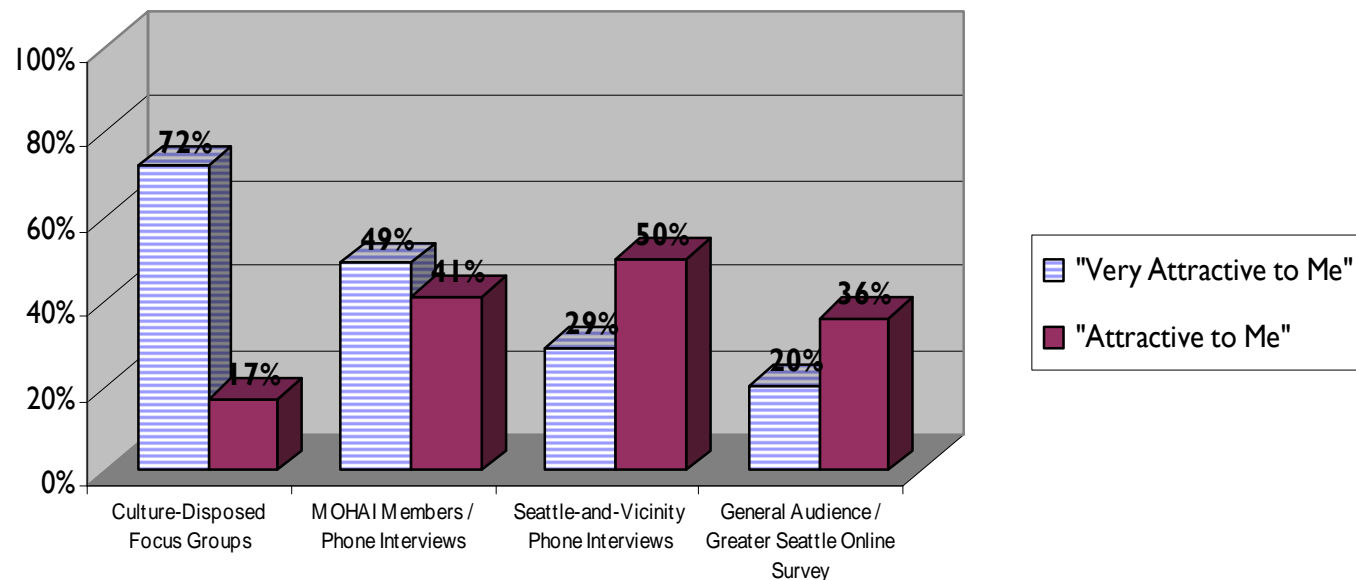
	% of Respondents
The child / children set the agenda most of the time; fun, their interests or attention spans come first.	33%
I make an effort to challenge the child / children with outings that are informative or educational.	52%
Adults in the household set the agenda for outings, doing what they most want to do.	16%

Impressions of MOHAI

- Low awareness, but generally positive impressions where they exist
 - ✦ *43% of our general online sample has heard of MOHAI; 60% of them have a “very positive” or “positive” impression of MOHAI*
 - ✦ *But only 13% say MOHAI is “useful and relevant to them personally”*
- Focus group impressions of MOHAI:
 - ✦ *“Kind of staid in the way it presents things” (Recent visitor, non-member)*
 - ✦ *“Peaceful and calm... there’s this quietness that just pervades” (MOHAI members)*
 - ✦ *“Like a school field trip to me” (Head of household with kids)*
 - ✦ *“I think the term ‘industry’ sounds boring – it sounds like work” (Ibid.)*
 - ✦ *“I like it because you can talk while in there, discuss things... but you have to really want to learn history” (Young pro-museum adult, head of household, no kids)*

Targeting the Culture-Disposed Market

Fig. 3. "A Place That Challenges Your Mind With Exhibits on Important Issues"

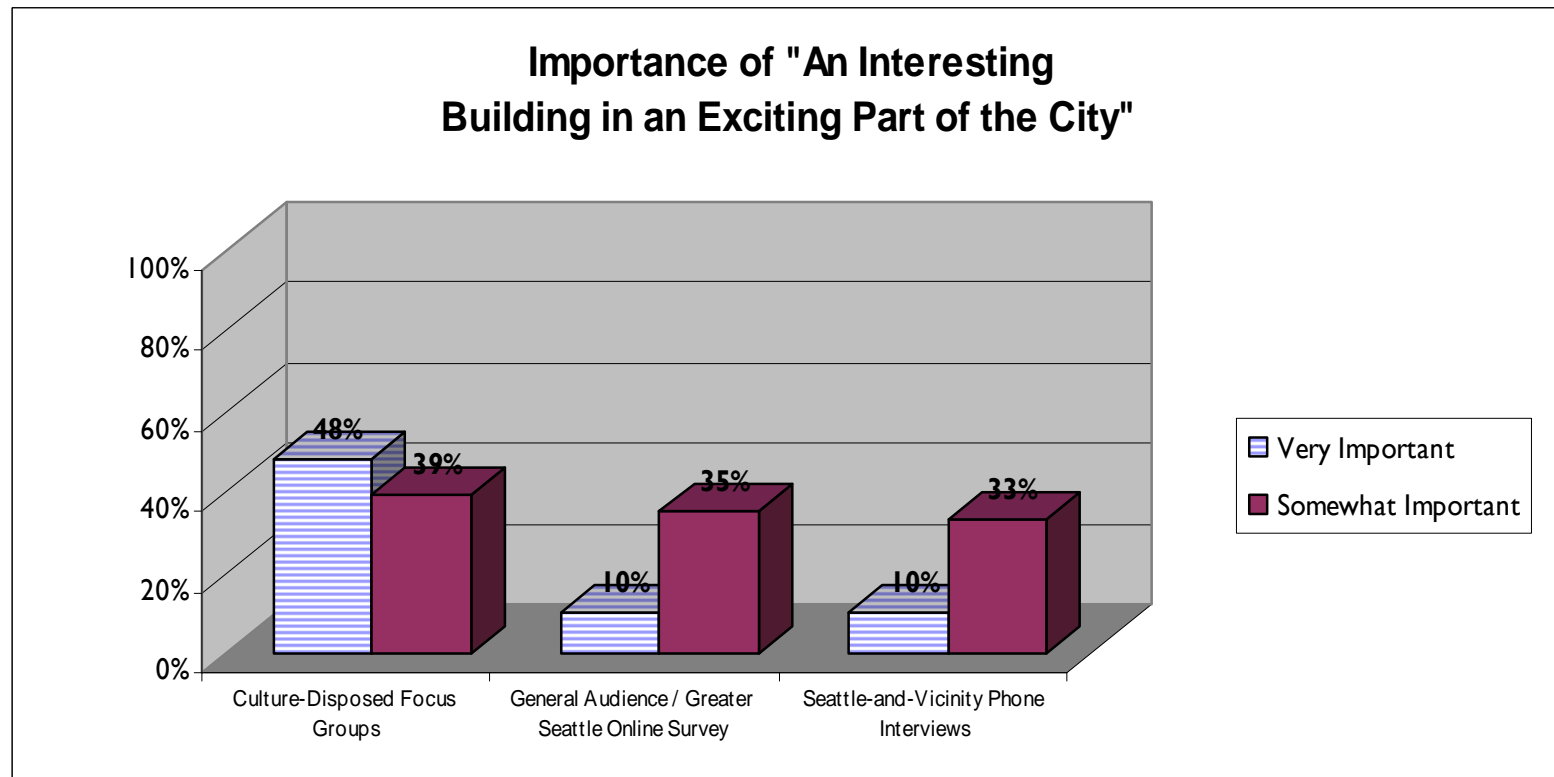


Compared to the market segment of culture-disposed adults, the population at large places less of a premium on the qualities MOHAI represents.

What Do the Culture-Disposed Want?

- “History” includes events since they were born: recent events
 - ✦ *“My [personal] history is leaving... I want to grab it, cling to it” (Focus group participant, young adult, lifelong Seattleite)*
- The culture-disposed audience wants “a place that challenges your mind with exhibits on important issues”
 - ✦ *72% of focus group participants say that concept is “very attractive” ... but only 8% of the general online sample say it is very important that an outside-the-home activity “challenges your mind”*
- “A place to get up close to genuine artifacts from the past”
 - ✦ *“Very attractive” or “attractive” to focus group participants (87%), general population (71%)*
- “A place that tells rich stories about the Pacific Northwest”

Moving is Only Part of a Relevance Strategy



The new MOHAI location in and of itself does not make the museum relevant for the long term; awareness does not equal relevance.

Topics to Stimulate Paid Visits



Exhibit ideas from MOHAI constituents and target prospects:

- Deep dive into the year 1968 in Seattle
- The 1962 World's Fair
- History of activism in Seattle, especially the Peace Corps
- Earthquake risks in Seattle from our topography / terrain
- The WTO riots
- Architecture in Seattle 1950-present
- Profiles of colorful Seattle characters: Madame K, Ivar Haglund, Emmett Watson
- History of women in Seattle politics
- Discriminatory housing practices in Seattle
- Rising sea levels and how they could affect this area
- History of Port Townsend
- A profile of the Boston Big Dig construction project and its lessons for Seattle urban planners
- Seattle speakeasies from the Prohibition era
- History / profiles of Seattle neighborhoods: Ballard, Wallingford, Fremont

MOHAI Key Constituencies – New Strategy

MOHAI Faithful

Current members, legacy supporters;
some will drop away owing to
dissatisfaction with change

Culture-Disposed Urban-Dwelling Adults

This group is underinformed about MOHAI,
maintains obsolete impressions, needs to see
MOHAI as relevant and add it to the “rotation”

South Lake Union Neighbors

Thousands of workers and residents who
need a neighborhood social / creativity hub

Suburban / Exurban Explorers

Daytrippers, some with children; they will
emerge mainly for “tent pole” attractions

Tourists & Impulse Visitors

Staying in Lake Union hotels, waiting
for Kenmore Air flights, strolling out
of Daniel’s



Welcome Wagoneers

New arrivals to the region who
seek orientation

Yellow Bus School Trips

Weekday school hours only, and
practically a separate business



Membership Purchase Behavior

- The majority of “MOHAI Faithful” are mission-driven; the broader majority is value-driven – even the culture-disposed adults
- 51% of telephone interviewees in Seattle/vicinity said they had purchased at least one membership / pass to a cultural attraction at some point; only 38% of those purchasers said they still maintain that membership today
- Most in the general population let memberships lapse because they are too busy to visit the attraction – not due to dissatisfaction with program content
- Purchase inducements deemed most effective by survey respondents:
 - » **Admission savings**
 - » **Museum-network benefits**
 - » **Benefits transferable to friends & relatives**
- MOHAI will likely benefit from develop and marketing an explicit “value proposition” to accompany the current “mission proposition”

Achieving 100k-120k Annual Paid Guests

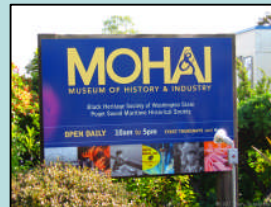
- MOHAI growth is a function of four factors

Relevant Content & Programs

A dynamic mix of regular “tent poles” plus permanent exhibits which define the MOHAI brand – plus focus on today’s civic issues

Marketing

The MOHAI brand story is not perceived or accepted by new constituents in sufficient numbers; perceptions are anchored in the past



Accessibility

*Will I be able to park nearby?
Will MOHAI be open evenings?
If I bring kids, can I feed them?*

Pricing

Family and suburban / exurban targets are more price-sensitive, but most beyond the “MOHAI Faithful” need to see a clear value case

Recommendations

- Evolve the MOHAI brand to represent recent (post-1950) history and current issues; use history as context to make the case for relevance
- Consider answering the call of culture-disposed adults for MOHAI to be a “dynamic civic salon” that moderates issue discussions
- The new South Lake Union location should be integral to the MOHAI proposition, not simply a more prominent place for MOHAI to do what it does in its old home. Leverage maritime and aviation theme opportunities; neighborhood representatives hope for a “creativity hub,” a “community clubhouse.” Give serious consideration to evening operating hours
- Leverage South Lake Union partnership opportunities, strategic and tactical
- Develop master brand awareness marketing built around a key message system emphasizing the museums’ essential qualities rather than exciting but transitory “tent poles”; launch MOHAI in the market as if it were brand new, because for many, it will be
- Do not overinvest in interactive exhibit technology – it is not a magic bullet and no substitute for heartfelt, relevant stories

Finally – Two Focus Group Insights



“The word that keeps coming to mind is ‘archival.’ MOHAI specializes in being an archive. Archives are by nature static. I would like to see – not an archival place, although they should be expert at that – but a very dynamic interface with the past that informs the future. That’s not static.”

Recent MOHAI visitor, non-member

“So you can begin to envision this new MOHAI as being the central node of a constellation of creativity... the invitation and mandate would be to come up with things that break the boundaries of how we think about museums – to break down the wall between the passive experience and the active participant. I think it would be huge right now to do things like that at MOHAI.”

*South Lake Union businessman and
neighborhood stakeholder*



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SUCCESS BEGINS WITH CLARITY

Thank You

Tom Farmer

206.443.9000

tom@solidstateid.com