

Loyalty Lab

Tracking and Deepening Visitor Participation at Small Museums



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LOYALTY LAB AT THE SANTA CRUZ MUSEUM OF ART & HISTORY

Project Summary

Loyalty Lab is a project initiated by the [Santa Cruz Museum of Art & History](#) to explore ways to build customer loyalty in museums and arts organizations. This isn't about knowing which donor move we're on—it's about creating legitimate relationships with visitors that are backed up with fun, surprising, and supportive materials. Our goal is to delight people with simple, low-tech interactions and items that make them feel valued—just as we would do as we build personal relationships.

This project focuses on celebrating and cultivating deeper relationships with participants using low-tech, low-cost techniques that are accessible to small and mid-sized institutions. These participants could be visitors, volunteers, users, patrons—whatever you call the people who engage with your organization.

IMLS provided \$19,657 in seed funding for the Loyalty Lab. While the project is ongoing, this funding was used in 2012-2013 to:

- Hire Adaptive Path, an innovative user experience design firm, to host a workshop with museum staff, visitors, trustees, and members to explore the existing onsite visitor experience and identify opportunities for loyalty-related enhancement.
- Develop two simple experimental prototypes to build on lessons learned in the first workshop—a “Five Fridays” card and a new volunteer “Goodbyers” program—to test our hypotheses around visitor loyalty. We also deepened our systematic use of photo booths at museum events to document and celebrate visitors' actions (see photo on cover, more information [here](#))
- Host a second workshop with game designers and museum professionals from across the US to report on our findings from our initial prototypes and to hear from professionals in other institutions (Boston Children's Museum, Smithsonian) about their related experiments. The game designers led us in useful exercises that got us thinking differently about building affiliation and energy around deepening engagement.
- Begin a process of technology development to explore lightweight ways to do basic attendance tracking that can help us know more about who visits when and act on it responsively.

Much of the work on this project is documented on this open blog: loyaltylab.wordpress.com, where individuals both at our museum and around

the country are sharing their ideas and experiences around visitor loyalty and engagement.

Process and Lessons Learned

Because this project was iterative, we have separated the process and lessons learned into three rough phases.

Phase 1 – Exploring the Visitor Experience

On August 8, 2012, Adaptive Path led us through an incredibly useful exercise that helped us get a comprehensive view of visitors' actions, thoughts, feelings, and context for onsite experiences during a museum event. After our workshop together, we condensed the post-it based experience map into the following “lifecycle of a MAH event” that presents the visitor experience in the context of a (hopefully) growing relationship with the museum.





This lifecycle map helped us identify two unexpected and actionable pieces of information:

1. People don't need a lot of greeting or welcoming when they come in the door. They're here, they're excited, they're ready to go. In contrast, we are sorely lacking in helping them upon exit to connect the wonderful experience they just had with potential future experiences at the museum. We don't need greeters. We need "goodbyers."
2. For family visitors in particular, a big festival involves equal parts enjoyment and management. If we can make it easier for a family to manage their experience (keeping track of kids, addressing basic needs), they are less likely to see the museum as an exhausting ordeal and more likely to engage with excitement.

We addressed these two points by:

- Initiating a "goodbye" volunteer squad that focus on thanking people for coming and handing them flyers (on the way OUT) about upcoming related events. Improving our event photo booths and ensuring that participants receive links to their own photos promptly on Facebook and Flickr.
- Focusing volunteer efforts during the event on signing people up for our email newsletter (as opposed to selling memberships). The weekly email is the primary way people learn about the museum, and if you get brought to the museum by a friend, it is the easiest way to get involved.
- At our big monthly festivals, creating a "kid happy hour" before the event is in full swing to offer families a more focused, less chaotic way to experience the programming. This has been incredibly successful at increasing family attendance and satisfaction, as well as engaging people in the typically quiet first hour of each event.

Phase 2 – Five Friday Experiment

We decided based on the first workshop to test the potential for loyalty growth with a “Five Fridays” card. This simple double business card served as a punch card that identified every Friday from October 19, 2012 to December 28, 2012. If a visitor attended on five of the eleven Fridays in that time period and got their card punched, they would receive a free individual membership for 2013. This was a good way for us to test whether we could build a “habit” of coming to the museum on Friday nights, when we do most of our programming.



We handed out 500 Five Friday cards over two weeks starting on October 19, 2012. We handed them out indiscriminately, without asking whether visitors were Santa Cruz residents, already MAH members, etc. Frankly, we were skeptical of whether anyone would fulfill the Five Friday challenge, especially given the amount of travel people tend to do around Thanksgiving and Christmas.

Seventeen people completed the challenge, with most starting on November 2, 2012 and attending five Fridays out of nine through the end of the year. We have no information about how many people collected two, three, or four punches, as only those who completed five had the incentive to turn their cards back in. The energy around the program was very high. We look

forward to checking in in January of 2014 to see what percentage of those seventeen new members choose to renew their membership for cash.

This experiment made it clear to us that to be successful, we would like to be able to track this kind of information across all visitors so we can understand who is coming how often and encourage people through short programs like Five Fridays. Based on this experiment, we developed lists of the types of data we would like to ideally collect from visitors, with a heavy emphasis on simply knowing when people come and attaching that to their unique ID for communication and research purposes.

Phase 3 – Game Design Workshop

On January 29, 2013, we held a half-day workshop to share our results from Five Fridays and to learn from the Very Important Families program at the Boston Children’s Museum. Professionals from the Monterey Bay Aquarium, Oakland Museum of California, Museum of Craft and Design, San Jose Children’s Discovery Museum, San Jose Museum of Art, the Smithsonian, and the Seymour Center at UCSC attended the workshop. We invited Situate, a San Francisco alternate reality gaming firm, to come lead a component focused on how games build loyalty... and we built some games of our own.

This workshop opened up a few key areas of exploration:

- Rules and challenges, which we usually try to simplify or eradicate in favor of a positive visitor experience, can actually work to our advantage if they allow people to be “in the know” and strive towards something in their deepening engagement with an institution.
- Museums rarely provide clear celebration of “wins” in terms of explicitly rewarding a “successful” visit (what does that even mean?). We spent a lot of time brainstorming ways to create communal celebration points at the end of an event or exhibition as a way to help visitors feel like part of a group achievement.

Based on this workshop, our team decided to:

- Experiment with creating challenges for members and frequent visitors with winners receiving stickers or insider items that identify them as special.
- Explore ways to celebrate the end of the experience by improving the take homes we provide and potentially finding a way for everyone to share in a big moment at the end of an event (for example, a goodbye parade).

Project Results and Evaluation

We only evaluated the Five Friday card activity – and that data is incomplete until we know more about how these seventeen individuals continue to participate with the MAH in the future. This project was primarily about investigating what kind of data we need and developing low-tech ways to collect it. It was a success in terms of articulating, focusing, and creatively collecting some kinds of visitor data – but we don’t have much meta-data on that process.

Here is the data from the Five Friday cards in terms of when the seventeen people attended. Dates in yellow were free days.

Date/Event	Sherry	Albert	Thigani	Danny	Matthew	Amy	Pam	Lisa	Birgit	Angelika	Bunny	Clover	Antonio	Carol	Roseann	Mark	Michael
10/19- Trash to Treasure					X	X		X	X	X							
10/26- Moveable Type Truck									X								
11/2- Day of the Dead	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
11/9- Generating a Buzz	X	X	X	X			X			X	X	X	X	X	X	X	X
11/16- Radical Craft Night	X	X	X	X	X	X	X	X	X	X			X	X			
11/23- Exhibits																	
11/30- Exhibits																	
12/7- First Friday	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
12/14- Facts to Fiction	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
12/21- Solstice Art Market											X	X	X	X	X		X
12/28- Exhibits																X	

Some key non-quantitative outcomes of the project include:

- Staff members at a range of levels feel more invested in the museum and their ability to make change.
- Volunteers at events feel more confident about their role and how they can champion the museum—and our Volunteer Manager has more clear ways to reward and celebrate their efforts.
- A new part-time marketing and community engagement staff position, which was added in April of 2013, includes significant focus on following up with visitors after their experience and strengthening the cycle of repeat visitation.
- Membership staff and program staff can “speak the same language” about our goals with regard to deepening engagement and its relationship both to attendance and to giving.

Next Steps and Action Items

We are now in what could be considered Phase 4 – acting on the information we have gathered over the past nine months of experimentation. Specifically, at this time we are focusing on:

- Mainstreaming protocols for volunteer “goodbying” into all of our events
- Building up post-event online engagement—through follow-up emails, photographs on Facebook, and story sharing from the experience

- Sourcing and developing a data tracking system for our visitors and members

The last of these bullets has been the most troublesome. In January of 2013, a local technology firm offered to work for free to assess various options for us to accomplish simple barcode scanning and tracking of visitors. We wanted to determine whether we could develop a simple add-on to the very expensive donor software we use (Raiser's Edge) based on the huge proliferation of tracking systems out there for fitness clubs and other membership organizations.

Unfortunately, after several long startup meetings and longer months of waiting, this firm became busy and non-communicative. We were slow to respond and hire someone else to get the job done. We are now restarting this process with a paid contractor whom we have had good experiences with in the past. It took us too long to identify the problem and jump on it.

We still intend to implement a technology backend in 2013 to do the following:

- Tie visits to individuals
- Identify the difference between casual and repeat visitors (and glean insights about what makes someone jump from one to the other)
- Communicate with people based on their attendance—i.e. sending special emails to celebrate people's frequency or encourage coming back after a long while
- Create physical rewards for diverse and frequent attendance across our offerings

New ideas and Recommendations

There are several new ideas that emerged as a result of this work, most of which are mentioned in the narrative above. Specifically, we learned:

- Connecting the end of one visit to the prospect of the next one is the most important way to build repeat engagement.
- Providing volunteers with clear and simple ways to engage with visitors around marketing that do NOT require selling can be very successful.
- Keep it simple—we now ask visitors just one thing when they come in: "Have you been here before?" We use that question both to welcome them and to send them to specific offerings (email signup versus membership, orientation versus celebration of them coming back).