ARRE Technical Meeting
"Improving our Knowledge of Foreign Visitors to the European Royal Residences"
The Peterhof State Museum-Reserve (Russia)
10-11 September 2015

Participants:

Schloß Schönbrunn Kultur- und Betriebsges.m.b.H., Austria
Christina Schumann, Financial Controlling

The Royal Danish Collection, Denmark
Axel Harms, Head of Communication

Palace of Versailles, France
Denis Verdier-Magneau, Head of Cultural Department
Lionel Dupont, Manager of Marketing Department

Palace of Compiegne
Juliette Remyn, Curator
Maria Anne Privat Savigny, Chief Curator in charge of the National Car Museum

Foundation Prussian Palaces and Gardens Berlin-Brandenburg, Germany
Matthias Simmich, Deputy Director Cecilienhof Palace

Het Loo Palace, Netherlands
Susanne te Riet, Manager of Marketing & Communication
Laura Meerveld, Marketing & Communication department

The Royal Castle in Warsaw. Residence of the King and the Republic, Poland
Marta Smolinska, Specialist, Marketing Department

The Royal Łazienki Museum, Poland
Marianna Lutomska, Chief Communications Officer
Magdalena Lewna, Head of Education Department

Parques de Sintra – Monte da Lua, S.A., Portugal
Leila Costa, Tourist Agents' Manager

The Peterhof State Museum-Reserve
Elena Kalnitskaya, Director General
Larisa Nikiforova, Head of Service of Cultural Heritage Preservation and Learning

Svetlana Prantsuzova, Specialist of The Peterhof Research Center
Marina Kryshtalyova, Specialist of The Peterhof Research Center
Anastasiya Trapeznikova, Specialist of The Peterhof Research Center

Tatyana Zhukovskaya, Head of Planning and Economic Department
Valeria Karpovich, Head of the Public Relations Department

ARRE
Elena Alliaudi, acting Coordinator

The Higher School of Economics at Saint-petersburg
Ksenia Kuzmina, Senior Research Fellow
Ekaterina Shishova, Research Fellow

The Program of the Meeting

Thursday 10th September

12:00	Opening of the meeting	Elena Kalnitskaya
12:05	Round table for presenting the attendees	All
12:20	Recap of last RT proposals and Summary of the questionnaire answers	Elena Alliaudi
12:30	Comparing ARRE museums	Larisa Nikiforova, Svetlana Prantsuzova
12:50	Holiday as a pretext for reception	Elena Kalnitskaya
13:05	Peterhof Visitors: Statistics and Economics	Tatyana Zhukovskaya
13:20	Peterhof museum and children audience	Valeria Karpovich
13:35	Questions	All

17:30	Case history 1: Knowing Asian visitors in the Palace of Versailles	Denis Verdier Magneau and Lionel Dupont
17:45	Case history 2: Visitors to the project "Court Entertainment". Rapid analysis of audience.	Anastasiya Trapeznikova, Marina Kryshtalyova
18:00	Case history 3: Behavioral practice of different categories of visitors: the methodology of the study	Ksenia Kuzmina, Ekaterina Shishova
18:15	Discovering The Royal Łazienki Museum: Managing change in the Museum. From local to European brand	Marianna Lutomska
18:30	Discovering the Palace of Compiègne	Juliette Rémy and Maria Anne Privat Savigny
18:45	Questions	all
19:00	End of the session	

Friday 11th September

11:00	The contribution of the digital revolution to the public studies field, the case of the QR codes	Axel Harms
11:15	Schloß Schönbrunn visitors	Christina Schumann
11:30	Not only traditional surveys but also web based tools	Leila Costa
11:45	Discussion 1 – Could Digital strategies really improve our visitors' knowledge?	Moderator: Denis Verdier Magneau
12.10	Coffee break	
12:30	Discussion 2 – Brand perception study and mistery visits	Laura Meerveld Susan te Riet
12:45	Discussion 3 – How to evaluate customer satisfaction	Moderator: Lionel Dupont
13:00	Workshop: How can we reinforce ARRE cooperation? In the field of audience building in particular? The Big data analytics	Elena Alliaudi and Lionel Dupont
13:30	Conclusions and end of the meeting	Elena Kalnitskaya

Opening of the meeting

Elena Kalnitskaya: The Peterhof State Museume-Reserve represents a place of leisure for our visitors. I have already worked here for seven years, and I still think that Peterhof is a factory of joy, which brings pleasure to many tourists from all over the world. On the other hand, Peterhof, like the other Royal Residences, has also been an important political stage since the 18th century, when Peter the Great designed the residence. Nowadays, Peterhof is considered as one of the few Russian museums rated as highly as the European residences (last week Peterhof ranked second in the internet ranking of European gardens).

Today, it is a great honour for me to welcome the European Royal Residences after taking part in several other meetings in Europe. During this meeting you will have the opportunity to attend our festivities and see how we are preparing for them. The traditional autumn fountain festival is going to be a large-scale event welcoming three to four hundred thousand people.

Elena Alliaudi: Today's meeting in Peterhof is the second ARRE technical meeting in the field of audience development. The first one took place in 2013 in the Palace of Versailles and its aim was to establish an inventory about audience studies in royal residences. The proposal that came out of the first technical meeting was essential for putting together the basis for today's meeting in Peterhof. The two main objectives of this meeting are: firstly, learning from each other's progress since the last TM and, secondly, sharing our experience in the field of audience development, especially with foreign or international visitors. The meeting will also introduce the ARRE Creative Europe project (application in October 2015), which is based on audience studies.

I observe, from the responses to the questionnaire you have sent us, that almost all of you have conducted visitor studies at least once and that those studies are often carried out with both internal and external resources. For all of you, the traditional questionnaire remains the first source of information. However, it is very interesting to understand how digital practices are changing these methodologies (ex: QR code or information that we get from the ticketing system).

I would like to highlight that it is important to know our audiences in order to offer them appropriate visits, also because all these topics are deeply related to marketing and customer services. I have also noticed in the questionnaires that many of you collaborate with universities or tourist offices at national level. As such, through this meeting, I would like try to extend this cooperation internationally in the area of our Royal Residences.

Comparing ARRE museums. Visitor aspect

Larisa Nikiforova: We are proud to have the opportunity to host the Association of European Royal Residences and to learn from your experiences, especially because visitor studies are not exactly our specialty since we do not have that much experience in this field.

While analyzing the data that you have filled in the Excel tables, we observed that all of you mentioned seasonality, listed the main services provided by the museums, and gave the total number of visitors. However, nobody filled in the table completely. We observed that the main problem was the lack of information about foreign visitors, which raised questions such as: how can we know where they come from? What kind of different products should we offer to different groups of visitors?

Hence, my description of the results of the study will not touch upon all the issues but it will try to put forward some of the most important ones.

Seasonality: Seasonality in the museums is typical for all the museums and residences. The high season is approximately from May to August. This season begins quite early in France; in April in Versailles and in Chambord. The season ends later in Versailles, where October is still high season, and in Schönbrunn, where it goes until in December as in Het Loo.

Museum services: Not all of the services are listed below; however, they are divided into two groups. The services provided by most of the museums are standard services, such as tours accompanied by guides, temporary exhibitions, different special events, festivals, books and catalogues on sale, souvenirs, audio guides, catering, restaurants and cafes, shops, concerts, programs for children, and lectures. Some of the museums also offer unique, unusual services, such as smartphone guides, tablets with augmented reality, puppet theaters, horse-drawn carriage rides, roof visits, sporting events (cars, bikes..), etc. However, not all residences shared this information.

Total number of visitors: As mentioned, all residences provided their total number of visitors. We asked for data covering three years (2012, 2013, and 2014) and we realized that the differences between the years are not very significant. In general, we have observed positive dynamics - the number of visitors has been growing. In the future when we provide you with relative data, the 2014 data will be used as a reference. Among the museums, there are 3 gigantic museums, which have millions of visitors per year (Versailles, Peterhof and Schönbrunn) while other museums have hundreds of thousands of visitors per year. However, those numbers are not that important for the issue we are discussing today, since the correlation between foreign and local visitors, individual and organized visitors, is almost the same. As such, the scale of the residences is not so important here. Therefore we will operate the relativity data (in percentage).

Visitor Categories: How are the visitors organized? What categories of visitor can we identify when analyzing this data? First of all, we are dealing with data that we get from ticket sales. We can see that different museums mention different categories, and as such it was rather difficult for us to define common categories in our analysis.
- There are adult visitors paying full price, and there are students and different youth groups such as young people under 25 or under 18 years old, depending on the museums. For example, in Peterhof tickets for children under 16 are free. There are also separate groups such as students or families, however, not in all the museums. Moreover, there are benefits or free tickets for museum staff members, disabled people and teachers. We would like to draw your attention to this topic. For example, we observed that in Compiegne, more than half of the tickets (57%) are for free and that in Lazienky the situation is similar (63% of the tickets are free).
  However, we perceived that young visitors do not represent a very large part of the overall number of visitors and that in order to increase this number we need to keep working with them.
- We observed that even if a lot of residences work with a large number of tour companies, **individual tourists** prevail.
- In most of the museums **foreign visitors** prevail over local visitors (this information was provided by all the museums on the basis of ticket sales). For example at

Schönbrunn, 95% of the visitors are foreigners, at Versailles, 80% of the visitors are foreigners, and the Royal Danish Collection has 74% of foreign visitors.

On the contrary, at Peterhof, 78% of the visitors are Russians or from the former Soviet Union because they share the privilege of having the same type of tickets. Peterhof has only 22% of foreign visitors. However, this information is indirect since we cannot get the information from ticket sales.

- Indeed, it is difficult to obtain information from **ticket sales**. We also use the information from online sales because it allows us to track our visitors' geographic location, although this information was not provided by all of the museums. Regarding the percentage of online ticket sales, the numbers also vary. For example, Sanssouci has 29% of tickets sold online while Peterhof has just 0,12%.

- **Audio-guides` statistics** is also used in order to understand our audiences. On average 60% of the visitors use audio-guides in our residences. In some museums the audio guide is included in the ticket price, such as Schönbrunn and Versailles, who have the largest number of audio-guide users. The observation of the foreign languages requested by visitors also gives us important information: English, French and German are used in all the Residences. In Versailles we also observed a large use of Chinese, Japanese and Korean. In Peterhof we have recently provided a Chinese audio guide. In Versailles and Schönbrunn we noticed 30% of Asian visitors while in other museums the number of them is lower. However, these are not absolute figures. In Peterhof we do not have any tools to obtain such information and this might be a problem for many other residences.

- **Websites analytics** is often used to define trends about visitors´ geographical provenance. There is an interesting figure about Asian visitors. For example at Schönbrunn, 20% (564,927) of the foreign visitors are Asian tourists and at Versailles 30% (148,800) of the foreign visitors are from Asia. We were interested in the data about Asian tourists; however, there was not that much of it and not all the residences provided us with it.

- **Mobile app and Wi-Fi** can also help us to understand visitors even if it is difficult to track them or categorize them. However, just a few museums provided information about their Wi-Fi usage. We have observed that Wi-Fi is not available in all the museums, and as such it is not possible to obtain complete statistics.

Duration of the visit: another very interesting figure that not everyone was able to provide is the duration of visits. How many hours do our visitors spend in the museums? It is very difficult to state this figure with great accuracy. The information that we get is usually based on two components, the time given by traditional methods, and the regular park visit. Versailles was very exact about the time that visitors spend in the palace. We would like to know how you managed to get such precise calculations: average of 2 hours and 38 minutes spent in the palace.

Denis Verdier Magneau et Lionel Dupont : we calculate the time that people spend on the estate (not the time of visiting). The visitors communicate it to us as they leave the estate. The average time of a visit is always the same in Versailles, approximately 1 hour for the state apartments and 1 hour more for the gardens. Only 30 percent of the

visitors decide to visit the Trianon. The time is in fact 1 hour and a half for the chateau and the gardens and half an hour more for the Trianon and gardens.

Proposals to reinforce ARRE member cooperation in the field of audience development:

Elena Alliaudi (ARRE):
On the basis of the proposals from the last technical meeting, we have observed that the topic of visitors in royal residences is a subject worthy of large-scale reflection. In order to work more efficiently on this topic, the creation of a concrete common project would be desirable. We could create a European Audience Observatory, which would enable us to compare our data weekly or monthly, and identify important trends (e.g.: Asian audience). As such, we would collect a huge quantity of information from all the residences, we would put it together and share the information through the Observatory. Thus, within the framework of European Union funding, the ARRE GA (General Assembly) has decided to construct a project for the Creative Europe programme, in order to experiment with this new kind of work with the project partners, and later to extend it to all ARRE members.

With the help of a new start up in Paris, ARRE is also trying to develop a tool that would give our visitors information and content about the residences while visiting them. In return, this would give ARRE information about our audience. This tool works with the e-beacon tracking system, and as such, we can gather information about our visitors in a completely automatic manner, and without the inconvenience of registering the information manually through a paper questionnaire. This experimental tool should be ready in October 2016, and if it works, we are planning to extend it to other members of ARRE. The idea is to gather information from every residence, to compare the data regularly, and subsequently identify certain trends, as for example the study of Chinese visitors.

IDEA could also allow ARRE to open our network to the public, tell them that we exist and promote all the Royal Residences. One of the promotional activities could, for example, be to produce a common video and show it to our visitors in every residence. The aim is not to inform our visitors that the royal residences are in a network, but to inform them that there are other palaces to visit. For example, we know that Asian tourists coming to Europe go to the Palace of Versailles since it is famous worldwide. However, they might not know that there are other interesting palaces to visit. The cooperation of all ARRE members on the promotion of the royal residences would make our network stronger.

Moreover, the royal residences are related by their history and this promotion could be the way to explain this connection to our visitors. The promotion would be a part of the European project that ARRE is building, and thus it would be financed by the European Commission. It would allow us to experiment and create something new.

This tool could be the first activity that the ARRE members work on together and from which all the residences could benefit. Therefore, I would like to open a discussion on this issue. What are your experiences in this field? How do you imagine this tool? Which actions could we perform together as ARRE in order to collect all the information?

Leila Costa (Parques de Sintra):
The Sintra palaces use an application called ´´talking heritage´´, which gives visitors information about collections, exhibitions, monuments and the natural heritage of the palaces. The aim is to develop this application, which would be like an experience diary, so that questions or small questionnaires would pop-up in the application and the visitors would give instant feedback. An equivalent of this application could be applied to all the ARRE members in order to collect information about the visitors.

Marina Kryshtalyova (The Peterhof State Museum-Reserve):
Another way of gathering information from our visitors could be by ´´web scraping´´. It could provide us not only with geographical information about our visitors (from which countries or regions people search for residences), but also what search words they use, or at what time of year.
It is also important to know what the audience writes about our residences of their own accord (eg. Facebook posts, comments, photos). If there is a way to scrape this data from the web, we would not need the visitors to answer so many questions while they are visiting a residence, an exhibition, or a museum. Some marketing strategies already use these tools, so we could also use them to our advantage. The remaining question is how to put all this information together and organize it into a database.

Lionel Dupont (Château de Versailles):
The large majority of visitors to the Palace of Versailles are foreigners (80 percent), thus it is important to know our audience (what type of visitors, from where, and why or why not they come). In Versailles, we already share our data about national and foreign visitors with other national museums in France. For the moment, it is an informal group and we just exchange information to observe and identify trends, but we do not work on a common project. It would be interesting to share that information with other royal residences in order to identify trends. It is also interesting to observe that our visitors are highly motivated to visit other residences in other countries.

So in order to keep our network thriving, we first need to inform people that different residences exist. The second step would be to involve European tour operators who organize European tours, in order to promote our network through them.

Susan te Riet (Het Loo Palace):
As a first step, ARRE members could all ask their visitors the same questions. For example, which other European palaces have they visited, are they interested in or are they going to visit other European palaces? Another important point is to inform visitors that there are other royal residences.

Axel Harms (Rosenborg Castle):
ARRE members could start by identifying what information is useful and what kind of data we need (eg. geographical data).

Moreover, we know that our visitors are motivated to visit Royal Palaces; however, it is not sure if they would be motivated to visit the network of Royal Residences. ARRE should be

careful to highlight the connections. It should use the network as a professional exchange in order to work on what is most beneficial to ARRE visitors.

In order to ensure the most effective promotion, we should base our action on data about our visitors. If we are to make a promotional video, we should not show all the residences but only those that specific visitors are likely to visit. For example, there is a high probability that visitors to Copenhagen would be keen to visit Saint-Petersburg, since there are cruise ships going from Copenhagen to Saint-Petersburg. Therefore, we should promote Peterhof and not for example Schonbrunn, since there would be a very small correlation between visitors to the two residences.

ARRE should use data to prepare relevant promotion. The attractive audience for us are people who visit more than one country on a specific trip. First of all, we should detect how big that market is (people travelling to several countries in Europe), and what their itineraries are. Then, we can promote specific places where we know the visitors are heading.

Elena Alliaudi (ARRE):
People generally do not change their plans during the same trip, the goal of the promotional video is to give our visitors inspiration for their next trip and to promote all the palaces together.

Christina Shumann (Schloß Schönbrunn):
The idea of a promotional video, being something like a teaser, showing and informing people that there are more places to visit during their next trips, is very interesting.

Matthias Simmich (Foundation Prussian Palaces and Gardens Berlin-Brandenburg):
The risk of such a promotion is that the visitors may forget about the places we show them in the video until their next trip. Often, it is hard to push our visitors (in SPSG) to even visit other palaces in the region. As such, it would be difficult to convince our visitors to go to other palaces in different countries. Moreover, we would need to use a lot of resources and money. Another question would be how to explain to our visitors that the royal residences are linked. An approach using data in order to make the most effective promotion seems more relevant.

Denis Verdier Magneau (Château de Versailles): (Paris Museum Pass)
Many years ago, in Paris we created the "Paris travel card" (Paris Museum Pass), which is a partnership between various monuments and sites. In the beginning there were 4 museums and sites (The Louvre, Versailles, Arc de Triomphe, and Orsay). Today we have 40 museums participating in this offer. First, we were dealing with the same question; weather the visitors would be convinced to visit other smaller monuments or museums. Nowadays, the card is very successful among foreign visitors as well as among Parisians. With this card people can discover not only the big monuments like for example the Louvre or Versailles, but also small museums and sites.

This kind of card could also work for ARRE. In many countries we already have common tickets for different residences (Sintra, SKB, etc.). However, this card (pass) would work on a European scale. First, we should observe our visitors and then, create a special European pass

which would allow people to discover different residences for a special price or with special conditions.

The goal is not to reproduce exactly the same pass as in Paris. We could imagine a pass that would be valid for 1 or 2 years. Our objective is to motivate people to visit different residences in Europe. The ARRE members could offer special prices that every residence could fix. However, before proposing a new ticketing system, we have to explore the information about our visitors.

Matthias Schimmit:
The Paris pass is limited in time and visitors have to pay for it. They get a reduction on fees and they can even visit all the museums. If they buy a royal pass they are in competition with the Paris card and they also get reductions on other residences while they are in Paris. The question is also how long should this pass last?

Summary - Proposals for joint initiatives

1) SHARE DATA between residences in order to create a **European Audience Observatory** (IDEA) - *Versailles, in particular would like to share their visitor data with other residences in order to identify trends*

    WHAT TO DO:
- **Establish what information is important** and useful to build the ARRE Observatory and identify trends in European Royal residence audiences

- Identify common tools (**app** or **questionnaire**) in order to obtain instant feedback from visitors

- **Use digital strategies to** get geographical information about our visitors (the words they use in their search, or time of the year…) → **Web scraping**

2) PROMOTION – ARRE JOINT INITIATIVES

- **Promotional VIDEO** (teaser) informing visitors about all the palaces and museums of ARRE in every residence
- **European Royal Residences PASS** – create a time limited ARRE Pass, similar to the Paris Museum Pass, which would give visitors privileged access to all the residences of the ARRE network