

**Minutes of the ARRE technical meeting
Palace of Versailles, 7-8 November 2013**

Object: « Improving our Knowledge of visitors to the European Royal Residences »

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Opening of the meeting. Round Table for the presentation of attendees. Introduction:

ARRE was created in 2001. **Mission:** to develop an existing network of professionals working in European palace museums by providing a complex in which they can analyse and share practices and experiences. **How:** by facilitating international mobility between members, by running exchange programs and creating common tools. In 2009 in Schönbrunn, there was a meeting about visitors, particularly flow and shop products, today is in the same field.

Aims throughout these 2 days are: to compare different methods used by the European Royal Residences to better understand their visitors, to compare survey results, to better know the visitor profiles, the visits' contents, the trends and future development, to improve awareness of specific experiments and studies carried out and to identify actions that could be carried out jointly.

Summary of the questionnaire answers (See PowerPoint)

Seasonality:

In Versailles, looking at our survey chart there is a big difference in visitor numbers depending on the season. One of our aims is to try not to have too many people in high season; April to July, and to increase the numbers in low season; January, February and December. Create more of a balance.

Foreign Visitors:

Another summary was to compare the percentages of foreign visitors in each palace. Sites like Schönbrunn, Tower of London, Kensington, Charlottenburg and Versailles, have more than 50% foreign visitors. We also think there is a correlation between groups and foreign visitors.

Based on visitor numbers on some of your profiles from 2012, some charts are less detailed than others and will need to be more refined.

Versailles: out of the 2012 visitors, approx. 7million, French visitors, 25%, USA, 12%, China 8%. The most represented European countries outside France were Germany, Italy, United Kingdom and Spain.

Chambord: nearly 800,000 visitors, over half French, 53%, like Versailles; Germany, Italy, UK and Spain were most featured European countries, however Belgium and the Netherlands also. Countries outside Europe, only 25%.

Schönbrunn: nearly 3 million, 15% German, 7% Austrian, Italy nearly 8%, USA, just 7%, other European countries, France 5% and Spain. In terms of Asia, Japan 7%, as opposed to China's 5%.

Charlottenburg: 25% German, then France 13%. Outside Europe; USA 9%. (Charlottenburg approx. 350,000 visitors).

Rosenborg: nearly 280,000 visitors, 38% Danish. England, Holland, France, Germany, 33%. (The Rosenborg chart is based on the numbers that came out of a national survey of all the museums in Denmark, fairly precise but designed for all Danish museums so doesn't take into account a museum like Rosenborg that has so many foreign visitors. They do their own survey based on cash registers where they ask 30-40,000 visitors each year where they're from. The numbers are pretty consistent and they are divided into more specific groups, being divided into nearly all the countries in the world in their own survey.)

Historic Royal Palaces: Tower of London had approx. 2,400,000 visitors in 2012, Western Europe, such as Germany, France, Italy etc... made up 29% of visitors (North America 24% and UK 23%). Hampton Court had approx. 500,000 visitors 2012, 53% British, 16% traditional Europe, 15% (this being Germany, Italy, France etc) North America. Kensington had approx. 360,000 visitors. 31% British, North America 27%, Western European countries 23%. All 3 have a predominant proportion of Australasian visitors, 5/6%

Comparisons:

In most palaces, the highest proportions of visitors are from the country of the palace. Highest are Chambord, 53% French, and Hampton Court, 53% British. At Schönbrunn Austria is not the most prominent country, there are more Germans than Austrians. North America is prominent everywhere. They are the second most represented in Versailles and Historic Royal Palaces. Asian visitors; in Versailles, China 8% of visitors as opposed to Japan's 4%, however the proportion is the opposite in

Schönbrunn, where they receive 7% of visitors from Japan as opposed to China's 5%, and South Korea 4%. Russians are featured as a group in Chambord, Schönbrunn and Charlottenburg. Australasian 5-6% in Historic Royal Palaces, while 3% in Versailles. Versailles is the only palace to feature a South American country, Brazil 4%.

Comments:

-Cultural context of the countries needs to be taken into account. It is difficult to compare between palaces with say 340,000 visitors and palaces like Schönbrunn with 3 million visitors. Considering the population of the country, 6% out of 3 million a large enough amount. It is necessary to compare the situation based on the reality of the country and its population.

-Interesting to note that the amount of North American visitors remains relatively the same throughout, whereas the percentages of European visitors' changes, for example the percentage of Spanish and Italian visitors varies a lot between palaces.

-There are biases in these surveys, because of big groups coming in with mixed nationalities it is difficult to survey exactly how many there are from each country. Also the point of how easy it is to acquire a travel visa depending on the country. It is easier for a Chinese person to get a visa to Czechoslovakia or Italy for example, than to Austria or Germany.

-Emerging groups and emerging countries interesting to discuss because, for example in the last 3 years in Versailles there has been a huge increase in people coming from China.

Discussion 1 – What are the different methods used by the European Royal Residences to better understand their visitors (studies/surveys carried out)? Do you collect data on your visitors thanks to digital tools (websites, social media, online questionnaires, other...)? What are the different ways of counting visitors?

1. Collecting data about visitors: methods and tools

Where is visitor data collected? : At the entrances; At the ticket office; At the café, restaurant/At the end of visit; **How visitor data is collected?** : By survey/By ticketing software/By email survey

Palace of Versailles works with a company who asks visitors questions at the end of visit. Visitors of the palace but also the park to know what percentage visit the museum parts. Results show that 7 out of 10 that come to the Estate go to the inside part and 3 of them only visit the outside part. That's a tool that we call "observatoire des publics".

Versailles do not collect any information about visitors when selling tickets at the Palace because of visitor flow, it's taken too much time. What they do is ask, for example 1 visitor out of 50 or out of 100, his nationality at the ticket desk. Online ticketing gives more possibilities to gather detailed data.

Historic Royal Palaces like Versailles hire a company to do a quantitative survey at the exit of the palace. Another way to collect data is to send a satisfaction survey after the visit.

Het Loo Palace is going to hire a company to do surveys by sending an email (one of these companies has a response rate of 45%, its quiet high). Data processing application takes hours, they need to hire somebody but it cost a lot. However, it's best that an external company does this survey, for reliability and objectivity.

Royal Castle of Gödöllő has noticed that the results of the satisfaction surveys can vary depending on the time and place when and where they were conducted. When people are asked while queuing, the satisfaction is very low, after the visit it is much higher, when asked at the residence café it is even higher. As a conclusion, people tend to give positive response after the visit even if they had a mediocre experience. It can be explained by a desire to justify their coming to the residence and investing their time, effort and money. Therefore, the results of surveys are relative.

Palace of Wilanów, while queuing you are given a set of credit card-style entrance passes. You should keep hold of these as not only do they allow you to enter and exit the building throughout the day, but they will also become your ID card as you move through the exhibitions, many of which allow you to record your results (which are stored and then emailed to you afterwards).

In summary, externalised research and survey are much more objective than those conducted in house. Recommendation is to externalise the surveys and different researches.

Email survey is a way to change method of collecting data.

What kind of data is collected and how is it managed? :

Personal data: Name, Address, Zip code, Email address/ Origin of the visitors - Local/foreign visitors; Department/nationality; Number of visitors; Satisfaction. Collecting Zip codes is very important information to profile the visitors.

At **Rosenborg Castle**, one of fifty visitors is questioned.

At the **Château de Chambord**, the nationality is asked systematically at the front desk.. However the information is quiet limited and the data is not specific enough.

Palace of Wilanow educational program survey. The survey is made by teachers who evaluate workshops and are invited to leave their email address. Then the teacher receives a questionnaire by email and in that way the data is collected about what they think of the educational program and what kinds of groups they are.

2. Counting and tracking visitors: several ways

What is the best method to count visitors?

Scanner and barcodes: tickets

Tickets which are scanned when a visitor enters every part of the residence. In this case we know where they go, how much time they spent at each part of the residence and how many people enter the residence. Ex: **Rosenborg Castle** and **Royal Castle of Gödöllő** use this system. **Palace of Versailles** has a scan-system but for the moment it only gives the entrance information. Tablets give new opportunities for counting visitors but at the moment they are too technological and sophisticated.

Clicking:

Historic Royal Palaces uses this method. It means that they need a member of staff at every entrance to the territory of the residence and they only have information about the quantity of people entering and visiting but no other type of data about these visitors. This method is also used by **Rosenborg Castle** to count visitors at temporary exhibition.

Infra-red: outside area method:

Palace of Versailles uses the method based on the infra-red solution. But there is a real need to improve this technology. And again it doesn't give any information about the visitor profile. The problem is that people who are entering together are counted as one person.

Using the group reservation: ticketing software

At the **Palace of Versailles** booking for groups is compulsory. Each year, 1 million people come with groups. The booking is made by ticketing software so today is one of the main sources of data for visitors and also to dealing with the CRM System. **It's important to work on creating a link between different data in order to have a relevant tool but it's not easy.** One of the main difficulties of counting visitors is how to count people who are just crossing the park on their way somewhere else and how to count those who are visiting special exhibitions which have no tickets. The solution might be to introduce tickets to the exhibition and other parts of the palace. But here we have to be very careful because several tickets can demotivate people to visit.

3. CRM (Customer Relationship Management) system

Very few residences have it. **Palace of Versailles**: recently introduced and the marketing team hasn't really understood how to work with it effectively yet. But the expectations are high: the team hopes to find information about individual visitors and groups, what they are expecting from the visit, what they are interested in. A lot of residences are worried about CRM systems because of information safety. Usually the feedback on CRM systems is negative. Advice from British colleagues is to use a basic CRM system.

Collecting data on visitor, counting visitors and CRM system - objectives:

Improve data collecting tools and methods. Better knowledge of visitors: to build relevant statistics/ to suggest different visits or cultural products. Create a link between the different sources of information in order to have a relevant tool: public observatory / good CRM System.

Discussion 2 – How to know more about visitor’s experience? Systems for rating visitors’ satisfaction and e-reputation...

1. Measuring experience of visiting the website

Het Loo Palace uses Google Analytics that shows which pages are visited and for how long. It is possible to see if people spend too much time on a page where they are not supposed to spend a lot of time; it means there is a problem and the design is not intuitive enough. In the previous website, there was a survey that asked to evaluate the experience of navigating it, mostly for collecting customer’s data.

Historical Royal Palaces externalize this kind of survey. They have also conducted the usability study to improve and introduce relevant changes to the website.

2. Monitoring social medias & e-reputation

Historical Royal Palaces hire an external company to **monitor and evaluate their presence on the internet and on social media**. Currently, people who are interested in history are the core audience of their social media but it is too narrow. If you decide to use social media, you have to accept you are going to have negative feedback and you have to learn to react and response to people in the right way.

Palace of Versailles the biggest problem represents the third party social media such as **Tripadvisor**. We have to intervene in exceptional situations.

Rosenborg Castle think that we should not intervene into these types of social media and let them be free and objective. One of the biggest problems with the social media is the **lack of human resources** that can be in charge of them. Someone has to monitor and update them 24/7. Advice from **Rosenborg Castle**: hire someone who is really into social networks, someone who is passionate about them.

3. Ways to measure satisfaction of visitors

One of the solutions is to incorporate surveys and questions about satisfaction in the applications which are becoming more and more popular and widespread; with apps we can follow visitors literally from one room to another. However, at the same time we have to be cautious not to digitalise the experience too much.

Discussion 3 – Audience Segmentation: young, people with disabilities, foreign visitors... Do you have specific offers (activities/events/products) for them?

1. How to reach the audience?: specific visitors

Historical Royal Palaces: We have to work with all people whatever their background. One category of a hard to reach audience that is very important for us is local communities. It is especially relevant for the Tower of London that is situated in quite a poor and culturally diverse part of London. To work with the local community we organise special events: archaeology weekends, for example. We produce a lot of literature that explains how local communities can engage with the heritage. We organise out-of-wall events. As far as disabled are concerned, we are trying to ensure maximum accessibility. We also introduce different senses to our exhibitions: sound, smell, taste because we feel that for disabled people sensory experience is very important.

Palace of Versailles: In France there is a strict policy adopted by the State: the disabled visitors have a special card that is issued by the Ministry of Health and thanks to this card they have free access to the palace as well as other residences and museums. A law has been adopted in France according to which by 2015 all public places have to provide access for the disabled. It is a huge challenge for residences and museums especially the ones which were build long time ago like **Château de Chambord**.

Het Loo Palace: Welcoming disabled people is a logistical problem. A person in a wheelchair needs space to move and the museum must protect its collections.

Royal Castle of Gödöllő is free of charge and is fully equipped for disabled but they do not visit it. Getting to the residence is not an easy task.

Palace at Wilanów is not fully accessible for disabled people, only one part of the palace. The museum attempts to communicate more, organize events and workshops; its helps to increase the number of visitors.

Rosenborg Castle is so small that it is very difficult to equip it. When introducing equipment for the disabled we have to think about the balance between the investment into making the residence available and the damage we do to the monument by introducing it. It may sound very cynical but it is not. It is a real concern.

The only solution for **Château de Chambord** is to provide the disabled with virtual tours. However, the challenge is why they would come to Chambord to have a virtual tour if they can have it at home.

Royal Castle in Warsaw, we should remember that for these people it is the experience of going out and leaving their home. We organise special tours for disabled when they can touch things or smell or listen to sounds or music.

Historical Royal Palaces: It is curious that as the time goes by the consciousness about disabled people rises. Thus, curators take into account disabled audience more and more and design exhibitions accordingly. However, in the end the introduction of different senses and things developed for disabled are important and interesting for the wider audience.

2. Restaurant & catering: internal or external management?

Historical Royal Palaces: We have an external company which manages 7 restaurants. The biggest challenge is the image of the residence and the one of the caterer which can be quite different and this is unacceptable. The choice of external caterer poses many questions: small and local caterer or a big chain? What do we do if people complain about the food? How do we manage the relationships with the caterer?

Het Loo Palace has the same problem. At the same time they have different caterers for restaurants and special events. When people are renting spaces in their residences to organise a party or a wedding we want to give them a choice of a caterer.

Rosenborg Castle: Before had worked with small local caterers but this year have chosen a big one and hope that the quality will increase. We're thinking about internalising catering but finally have come to a conclusion that catering is not their core activity and moreover it is a separate and a very complex and sophisticated business. Therefore, should externalise it and establish very transparent relationships with our contractor.

Palace of Versailles being a public institution is not allowed to have internal catering. Therefore, this service is externalised but there is a team at the palace who manages the relations with the caterers and also entertainment activities on the estate like bikes and electric cars. In the palace, there are two restaurants, one at the Petit Trianon, two at the Grand Canal and in high season mobile catering in the park.

Château de Chambord has a restaurant inside the palace and hires someone to cook, however it only fits 20. The problem is that near the castle there are several independent restaurants and shops and they are a disaster in terms of quality. Moreover, visitors believe they are part of the castle; it is very bad for their reputation. There are legal battles taking place to try and regulate the situation.

Discussion 4: Who are the park visitors? Do you have specific offers (activities/events/products) for them?

1. Park administration and entrance fee

Schönbrunn Palace Park administration: The administrations of the palace and the park of Schönbrunn (150 hectares) are divided. In 1992 the Parliament decided that the Schönbrunn palace shouldn't receive public subsidies anymore and the palace should finance the park which was originally owned by the Ministry of the agriculture. They took the responsibility of the park only on condition of charging an entrance fee.

The necessity of an entrance fee: It is not possible to take care both of the palace and the park and the buildings inside with only the money from entrance to the palace. It will be inevitable to charge entrance fee unless the Parliament gives more money. Compromise in last years - Entrance fees are charged in some attractions in the park like the Maze, the Gloriette, the Privy Gardens. But this is not enough to cover the charges of the park.

Problems: Since 2008 the budget for the park was cut. The visitors don't know that the park and the palace are separated. The parliament was reluctant to charge the visitors as the park is traditionally considered as free, given to the people of Vienna by Joseph II in 1780. Possible public disagreement – damages might be caused in the park. The cost could be the same as the gain from the fee. It is not a problem of money but the fact that there is an entrance fee. There are tour operators which are offering visits to parts of the palace, gardens and park which are free for the moment.

Not permitted: Dogs, bicycles because some paths are too narrow. Running is allowed.

Schönbrunn's Garden app: Developed in cooperation with the University of Applied Sciences Hagenberg, department of Mobile Computing. The goal is to increase the visitors in the park, make Schönbrunn Gardens more attractive for local audiences, loyalty program and adapt content to the visitor's profiles; Tourists: historical information and facts, guided tours / urban orienteering race, photo spots, souvenir. Families: sticker album, temporary tour and exhibitions; entertainment, relaxing. Runners & Joggers: route suggestions, thematic routes, challenges, Social Media Interface. Students: Sticker album, urban orienteering race, knowledge quiz, historical information. Local visitors: events, route suggestion, gastronomy. Senior Citizens: Panorama Train, recovery / breakpoint, guided tours, historical information.

The development of such an application costs money. The usual question is how much does it bring. Probably nothing because it will be offered for free. It can be an attractive extra service when there is an entrance fee. In 2014, the application will be evaluated and it will be decide if it will be implemented. It is a project that cost not only money but also human resources and time. Clear advantages are needed to justify the investment.

Prussian Palaces and Gardens in Berlin-Brandenburg

Negotiations: The Prussian Palaces and Gardens Foundation initially planned to demand a mandatory fee for park entry to restore the garden. To prevent a mandatory fee the city Potsdam concluded a contract with the Prussian Palaces and Gardens Foundation, paying 1.000.000€ per year from 2014 to 2018. There were ambitions on the part of the city Potsdam to cancel the contract, but status quo is that the contract has to be fulfilled.

Initial considerations concerning mandatory fee for park entry:

Fee policy adapted for the different public: (in discussion). Exceptions for the people living in the surroundings/ students. Tourists 2 euros. It is calculated in the group price. The individual visitors will have to pay directly in front of the park.

Infrastructures: There are specific cycling routes which are very used. For the garden exhibition next year electronic cars will be introduced for the first time. This cooperation will continue after the exhibition.

Het Loo Palace

Park administration: Separate administration of the park and the palace.

To visit the palace and the gardens, visitors used to have one entrance ticket for the palace that gives them the permission to visit the park around the gardens. Now visitors must buy two different tickets.

It is a disadvantage for the marketing strategy because the park is used as an extra. Not many visitors who are visiting the palace and the formal gardens have the time also to visit the park. Even if the advantage of the single ticket was not used very frequently it was a very attractive part because in the park visitors could also see the country house of the former Queen Beatrix, open occasionally to the public. The ticket price is not very high. You have to pay 3 euros to get into the park.

Palace of Versailles

A subsidiary owned by the Establishment, called *Château de Versailles Spectacles* is in charge of shows taking place in the gardens but also in the Chapel and the Opera. The summer activities such as the fountain shows receive a lot of people (more than 1 000 000 people). The shows in the Chapel and the Opera are most of the time non lucrative activities.

Gardens of Versailles: Admission to the French gardens is free except on the days of the Grandes Eaux musicales et Jardins musicaux shows. From November to March admission to the gardens is free every day. From April to October there is an admission charge for the gardens on Tuesdays, Saturdays and Sundays and on some other days (including bank holidays). People living in the city of Versailles are upset by the entrance fee during the summer because they have the feeling of an ownership: Proposition to create subscription to have access to the gardens during the year for a small price.

Problem of different fee policies between the Establishment and *Château de Versailles, spectacles*. For example, the entrance in the palace is free for children but they have to pay for the gardens.

Project to create an outside tour for people who are waiting to enter the palace and encourage them to visit the gardens instead of waiting, and to have access to the palace when they come back. It could be a good solution to avoid queuing. For the moment, the project can't be realized because of the working progress in the palace. Developing an application for its visitors.

The park of Versailles: Free for pedestrians but there is a fee for vehicles (3€ for a motorcycle, 6€ for a car and 30€ for a bus). Visitors come to jog or cycle, but also with cars. There is a difference between the historic gardens and the park. It is possible to cross the park with a car to go to the Grand and the Petit Trianon for example. The goal is not to have an entrance fee but to make a free offer to the visitors who are, most of them, coming from the surroundings. The aim is to encourage them to go to the gardens and the palace by creating links between the park and the inside park.

Historic Royal Residences

At Hampton Court the garden is considered as a part of the residence and the experience of the visit and it is included in the ticket price. There used to be a garden only ticket but it wasn't very popular and it is not done anymore. There are other green spaces around that people can visit.

Museum of King Jan III's Palace at Wilanów

There is an entrance fee in the park. Running or cycling is not allowed in the park area because of its dimensions. The paths are narrow and their surface has been recently renovated and has to be protected. Also some of the visitors are old people or people with small kids from the neighbourhood. Dogs are not allowed either. There is an audio guide and a map offered to the public. They are quite popular – 10 % of the visitors use them (about 60 000). We are working on improving this tool by adding further information. It is free of charge.

Royal Palace of Gödöllő

The building and the park are state property and have the same owner. The entrance to the park is free: many local people pass through the park to go to the train station. An entrance fee wouldn't be well received. There are no free time joggers but a school uses the park for training. It is not permitted to cycle inside the park but visitors can take their bikes in if they get off them. There is not yet an app for the gardens of Gödöllő. It is planned to eventually make a description of some objects or plants in a few years. Not such a complicated tool as at Versailles or Schönbrunn.

Royal Castle in Warsaw

There is no park and the entrance to the gardens is free. The gardens are not finished yet. Many renovations are planned thanks to the funding from the Ministry of Culture. The gardens are quite small 3 hectares – there is no place to run or cycle but there are events organized on the grass.

Chateau of Chambord

The park of the castle is huge. It is very difficult to manage it because everything is far and you need 1h to get from one side to the other. Half of Chambord visitors go to the park but not to the castle because they don't have enough time to visit everything. In Chambord it is possible to run or cycle and there are also roads and visitors come with cars and busses – they can get out of the car and take a picture and then they get back in. There are no gardens for the moment but there will be – they are planned to be quite small and free of charge.

2. Visitor studies in the gardens

Prussian Palaces and Gardens in Berlin-Brandenburg: There is not a regular survey. But such a one might be made for the garden exhibition next year.

Schönbrunn Palace: There are exhibitions every three or four years and it is possible to know how many passes are sold. The visitors are asked how many of them have entrance tickets to the Palace. The rate of those who come with passes to Schönbrunn and don't buy tickets is going up. It is possible to count the number of tickets which are sold in different attractions in the park - Gloriette (150 000 entrances), the Maze (3 000 people) and Privy Gardens. The park is visited by a lot of local people who don't usually visit the palace. Not because they are not interested in, but because there is not usually a temporary exhibition because of the lack of place. Furthermore, an exhibition is going to change the state apartments while visitors want to see them in their original appearance. A program for local people is being prepared. In Austria, there is a technical tool installed to the gates in some institutions. But it can only calculate people who go in through different gates and can't give information about who they are.

Palace of Versailles: In the observatory of visitors there is a part dedicated to the inside and the outside. Interviews are carried out continuously throughout the year on all types of days and at various times at different interview points: on the 9 main gates of the Estate. People are asked what they have done during their visit. We have a general figure but not very precise estimation. The studies are important because those results are reproduced in the press and it permits to compare the rate with other cultural institutions.

<u>Discussion 5: How to increase repeat visits (museum friends, subscribers...) Do you have specific offers (activities/events/ products) for them?</u>
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In the questionnaire, thanks to the answers we know that some of the palaces have memberships program – Historic Royal Palaces, Prussian Palaces and Gardens Foundation, Versailles, Gödöllő and Het Loo. What are the reasons of the creation of this membership and what are the offers to the members?

1. Membership programs

Société des Amis de Versailles: The Friends Society was created in 1907. Today 7 000 members. Its purpose is to find funds in order to release works and restorations. There are 3 categories of members who benefit of different advantages depending on their donation: free entrance, information concerning the palace and the society, dedicated program etc. Different amounts of donations; There are tax reductions, and the net tax of the minimal donation is quite low. Memberships cost from 60 euros to 800 euros. The main mission was not really understood by all members because some of them used the friend society in order to have fees advantage at the entrance.

The “a year in Versailles” / Subscribers: In 2010, a subscription was created for visitors at Versailles. The advantages are the main reasons that encourage people to become subscribers. Subscribers' advantages are a priority access to the palace, dedicated visits which are not offered to the

large public. The subscription is 50 euros, 15 000 subscribers. 1/3 (city of Versailles), 1/3 (Paris region), 1/3 (France). For the moment the Palace hasn't undertaken a large promotion company to encourage subscription.

Historic Royal Palaces: 70, 000 members/ 43 pounds to be a member/There is also a family membership card. Advantages: newsletter, e- mails, discounts and special talks, music events, festivals. Difference between donors and members. The membership program should be of benefit to the members rather than asking for donations. Members can be developed into people who make donations. Donors who have given 250 pounds are *gold members*. Importance of segmentation: Shows potential members. Important to know which groups are more likely to join the subscription base. The importance of subscription is that it increases the relationship between the Palace and its public-communicate, exchange. Members become a part of the organization. They are ambassadors of the Palace. If there is a good CRM system you can collect data and understand what people want.

Het Loo Palace: The membership program used to be a part of the volunteer organization of the palace: to become a member people had to make a donation. For a year it has been a part of the department of communication and marketing. Donators became "friends" of the Palace. 80 % of the members are very old and not very active. To become a member: 37 euros for one person for one year (50 euros for two people at the same address) There is also a family membership card. The goal is to have more friends, and younger friends.

Advantages: In the past the donors only had free entrance and every year they received the annual book. There was not relationship at all. Now they have a discount in the restaurant, free admission to the park, invitations to events. Also an e-magazine - 4 times/year. Encourage them to bring another person with them by making a discount on the entrance fee.

Build a relationship with donors: They get invited once a year for a special welcome at the palace, the director talks to them. The Palace need to make a split in the future between donors and members: Companies or people, willing to donate something are free to do it as a membership or not. Members need to be more involved with the palace. Unfortunately there are not a lot of donations.

The e-magazine: The palace used to have a paper magazine twice a year. It was a historical magazine. The costs were much too high (time spending and money). Now there is a smaller magazine that appears four times a year with less text and more pictures. The goal of the magazine is to get more traffic on the website. The advantage for members is that they have the magazine sent by post to their home. There were 4000 exemplars for the more expensive magazine and now the first edition will be in January- 20 000 examples because they will be given to all visitors.

2. On average, how many times members visit the palaces

Het Loo Palace: Next year passes with barcodes will be implemented (from the beginning of 2014). There is a guest register department responsible for this barcodes. The subscription price is based on a visit three times per year.

Historic Royal Palaces: There is no barcode system yet. There are not precise estimations because the ticketing system can't count them. Those people a generally interested in history and they came to talks, events, etc. It might be supposed that on average they visit at least three times per year.

Rosenborg Castle: Generally in residences membership are priced very high (though opinions on this vary) That is not reasonable because there aren't capacity problems, it doesn't cost the palace anything to have another guests. If it is a driver for a stronger commitment to the institution and if it's driver to sell on site maybe you can be more aggressive on the pricing of these kinds of products.

Palace of Versailles: There is a survey – an e-mail is sent to subscribers after 8 months in order to know if they are satisfied and which advantages they have preferred. They say that they come more than 10 times per year. That includes the gardens and the park – that's why the number is so high.

3. Attract young members

Palace of Versailles: Subscribers are quite old. People under 26 benefit of free access, so the subscription must offer them other advantages. There is not yet a dedicated offer to young people but a research group was made in order to ask them what kind of offers they are interested in. They would like the palace to be open by night. It is not possible for the moment because of staff conditions

Het Loo Palace: It is possible to attract young people to the palace by sending them e-mails and informing them of special offers. It is possible to connect with these people with special e-mail marketing campaigns. The e-mails can be collected on the occasion of an exhibition for example. For example in the Palace of Het Loo, on the occasion of the exhibition dedicated to the former Queen Beatrix, a call was made for pictures of the queen. This exhibition could benefit from media support. It was very popular and people were asked to rate on the artworks they liked most and to give their e-mails. 7000 to 8000 e-mail addresses were collected in this way. Another method is to collect them when an e-ticket is bought. It is more difficult to collect e-mail addresses from people who have never come to the palace. It is possible to do it by organizing quizzes or competitions on the website. In many residences there is data security. It is imposed to ask each visitor if he agrees to receive e-mails.

Workshop: How we can reinforce ARRE cooperation? In the field of audience building in particular?

1. Proposition about creating a working group on counting visitors

How we can count visitors of Royal residences: Collect the information and distribute it in a general excel worksheet. It is a functional suggestion because the data will be delivered in the appropriate format. The royal residences should agree with the basis data that should be added. Royal Residences have the same category of visitors globally: individual visitors, groups, children, disabled visitors, free entrances. – Each of the residences can fill their kind of data without any change of the present visitor counting structure.

When: in a quarter of a year something general can be done. **How:** The Network secretariat can collect the information.

Some countries have calculations and others not. Some of them count the visitors in the park and some don't. We should have a common method of counting: those who are interested should send their counting method to ARRE. The methods are not so different so it is possible to find a common solution. It will be interesting to compare different systems for counting visitors and to see what is the most efficient. For example, is interesting to know if the ticketing system is a good way to count visitors. At Versailles there is a visitor database realized on a national level. It gives a more precise image of the touristic market. It is used to know if there is an increase or decrease of people coming from some destinations such as China or Brazil and then to make an appropriate offer to them. It is possible to make a European database.

Presenting general figures about public of royal residences in the Association might show what the impact of the royal residences on the tourist market on the continent is and what the different needs are. This kind of general study and publication might be very interesting to evaluate the consequences of our activity.

The problem with the different methods of counting visitors: Royal residences don't have the same methods of counting visitors: are the free entrances counted? Are participants of concerts or lectures or other events considered as visitors of the palaces? It will be difficult to have a common solution. Also are the visitors of the park and the palace counted differently? - ex: At Gödöllő it is separated - there are people who just cross the park – they are not considered as visitors. In the Netherlands, for Dutch museums it was difficult to compare visitor studies because of the different criteria used by the palaces. E.g. Some museums count visitors who come for an event, others don't. Differences in the entrance fee for children (Het Loo: free for children up to 6; other museums have free up to 12 years old.)

To compare the studies of different royal residences, there must be the same criteria of measurement: It is possible to start with a limited amount of information. For example e-ticketing- How many e-tickets are sold in a year. Compare and see eventual problems. Why some palaces sell more e-tickets than the others. It is interesting and easy to do/ how many people go for free/ the average number of visitors.

The reason for collecting the visitor data

Collecting this data is interesting only if the results are used. The results and analysis are valuable if royal residences make something out of them. One of the weaknesses of this kind of initiative is that most of the residences don't have the resources to efficiently use this data.

2. Complementary activities to the organization of the database

-to organize thematic meetings in the future about different topics related to the visitors (ex: ticketing, digital tools etc.) It will be one of the utilities of the database. It is the first step of this tool.

3. The opening of the ARRE organization to the general public

Promote in the future ARRE to the general public? : It will be interesting to publicize the ARRE website more- to inform the public that there are interesting royal palaces in many European countries. There are two different directions for an organisation such ARRE. The first one is an organization communicating to all Europeans, the other is as an organization communicating on a professional level with people who are affected by it. The first one is very difficult to realize. The ARRE might not be a very attractive organization for everyday European because when they are visiting one palace, it is a difficult task to make them interested in other Palaces on other parts of the continent. Maybe it is not the case now but it might be a good thing to be developed in the future.

4. Travel exhibitions?:

Subjects such as “le Nôtre” are perfect for a travelling exhibition because many palaces have links with him. There are also many common subjects to the Royal residences. This subject of “travelling exhibitions” has been discussed many times, but a case of making it hasn’t been presented. There hasn’t been an idea for the moment which is practically doable. There is also a problem with the cost. The budget of such an exhibition is huge, especially for a travelling one. Nevertheless, it might be attractive for everybody to divide the costs. There can also be an interesting common communication and marketing strategy. For the moment, even though there is not an exhibition organized with all the members there are a lot of bilateral exchanges. The network is used in order to make exchanges concerning exhibitions (for example – lending works of art).

**Minutes of the ARRE technical meeting
Palace of Versailles, 7-8 November 2013**

Object: « Improving our Knowledge of visitors to the European Royal Residences »

ARRE Members' presentations:

Study: visiting or not visiting the Palace of Versailles? (February 2013)

Versailles is 15 km from Paris; most of the tourists that come arrive from the Paris area.

We compared Versailles's visit plan with ten other major cultural sites in Paris. 1,350 people interviewed, divided into 4 groups, people who planned to visit and did, people who planned to and didn't, people who didn't plan or go, people who didn't plan to, and went. The Study was made in Paris near the Sacré Coeur, Notre Dame, l'Arc de Triomphe, the Louvre, the Tuileries, the Eiffel Tower while people waiting in the entrances to these sites.

First figure is the visiting rates of Parisian tourist sites; the Eiffel Tower is first, then Notre Dames, then Louvre. The Palace of Versailles is 44%. The Eiffel Tower has a close to 80% planned visit rate, 86%. Versailles also has a planning rate which is close to the visiting rate. There are more people from North America who planned the visit and realized it than the average. They are also the ones with the highest percentage of people who didn't plan to visit and did.

Problems:

Reason for not visiting is visitor's stay is too short, between 3 and 5 days in the Paris region. Short visits are more frequent than say, 5 years ago. 1 night 9%, 2 nights 18%, 3 nights 36%, then above 5 nights in Paris area, average close to 60%. An aim is to increase the rate for short stay visitors.

Time and transport difficulties are the main reasons. In high season there are a lot of people, it can be hot and crowded which would also put people off.

Solutions:

Promotion and advertising, guidebooks, promotion of exhibition events. Transport; position Versailles as a main site in Paris; a promotion campaign is underway saying 'paradise lost, 20 minutes from Paris' A new arrangement is being made with a bus company, 'Versailles Express' from the Eiffel tower to Versailles. It is less expensive than other buses as there is no guide, and no brochure or offers in the buses, just transport that is approx. the same price as the train. There is a contract between Versailles and the company, offer to use free stops on the way. There will be a link on website to the bus company website. Increase communication with hotel networks, for example selling tickets to hotels at a reduced price and they get a commission upon selling the tickets. Internal plan aiming to improve quality; reducing visiting lines.

Comments

-It would be important to emphasise that it only takes half an hour to get from Paris to Versailles, and the price of the visit without taking an organised bus, the most expensive the visit can be is 25euro, as opposed to the bus tour visits, where the cheapest is 60 euro. So emphasise how much cheaper it is if you get the train.

-People should be encouraged to visit everything, not just the main palace, to increase the quality of the visit. This should especially be encouraged because often they queue a long time, up to 2 and half hours.

-In Chambord the problem is the same, as it is not in the town, but near a town; with bad public transport, one train line, 5km from station. Their aim is to attract groups.

Gaining an interest– implementation of public survey results in the cultural and education offer (Wilanow)

Like Versailles they are far from the centre of the city. Don't yet have a survey on visitor nationality, though they know for sure that more than half of their groups are Polish. Beginning to concentrate on educational groups and investigating their educational programme. A survey that concentrated on the residents of Miasteczko Wilanów, a neighbourhood in the vicinity of the residence. They did face to face interview on 514 inhabitants.

Results:

Results show a good relationship between the residents and the palace, they recognised Wilanow as an important feature of living in their area. At least 50% frequently visited the palace and its surroundings, frequently being once a month. Another result indicated a potential weakness, it is rather perceived as a passive destination to relax rather than a culturally active offer. Reasons for this: a lack of knowledge about what is currently on offer in the palace. Visitor's needs: Miasteczko Wilanów population expectations regarding leisure activities are rather modest what they expect from recreation is; time spent with family or friends, films at the cinema etc. Activities requiring moderate involvement. They have faced problems such as problems with parking. They would like offers of reductions/ half price fairs

Solutions:

This survey has shown them that they should try to co-operate more with the local press and make information more easily accessible to locals, as well as frequent email communication. Now there will be lower prices for children. And they will improve conditions for cyclists and bikers. Will organize events specifically to meet the needs of the residents, introduction of less engaging activities, such as concerts and film screenings. Park, for instance, could provide lighter forms of entertainment. More ambitious events remain within the palace. They will create a link on the park website about the cultural activities in the park; nature blog, workshops, performances. Looking at the royal theatre; they are adjusting the needs for families with children. There are about 80 performances a year for their general audience and school groups. Suggested activities are children's bike trips from the town to Wilanow, combining movement with sightseeing, also running and sightseeing. The entertainment in the parks project has worked well and there has been a large increase of visitors in outside entertainment, such as opera, concerts, and performances. State support depends on frequent visitors, so they need to balance the monument being untouched with it being an enjoyable place to go.

Comments:

-Is there a project organized yet for specific membership for special rates, for families etc.?
It's possible to buy a quarterly card, much cheaper than the entrance fee, but only inhabitants of the neighborhood can buy it.

The Royal Castle in Warsaw- General review of visitors 2012

Introduction to the organization:

A new member of the ARRE this year, the castle wasn't just the royal residence but where parliamentary sessions etc. were held, before WWII, but during war it was completely destroyed. After the war it was rebuilt by the people rather than with government funds. It was opened to the general public in 1984. Over the past few years, Kubitsky Arcades renovated 2009, renovation of eastern façade this year. 2008, more renovations to the castle, and apartment of Prince Joseph in 2011. Rebuilding and recreating of gardens not yet finished.

Quantative study with the ticketing system:

550,000 visitors. More than half of visitors are regular tourists, 35% lectures participants, concerts, events guests and lectures audience. Many types of events, 50,000 approx., but not exact as events are mainly by invitation rather than tickets. Different kinds of tickets, sold ones indicate audience, discounts for children from 7 to students, and retired people, price a quarter of the regular rate. 19,000 family entrances. Almost 200,000 free of charge, 55%: this is because of special promotional action, free of charge in November, polish citizens, 76,000 in November. Here there is a problem with overcrowding, can admit 2000 people a day maximum.

The majority of foreign visitors chose English audio guides, but this is only a language division, there were significant numbers in French and Spanish also. School children make up 17% of visitors, lessons, workshops based on active and creative participation. Events guests, 50,000 people, make up 9% of visitors.

Cultural programmes:

School children make up 17% of visitors, lessons, workshops based on active and creative participation. Events guests, 50,000 people, make up 9% of visitors. From the marketing point of view, these events have increased their popularity. Other activities like book and art fairs. Last year 17,000 people at the fair at the Kubisky arcades, entrance was free. Children's day in royal gardens; entrance free, about 15000 people. People express interest in cultural programs, concerts, lectures, discussions; these events are attractive to visitors at all times of year

In terms of being a state institution, there are some significant diplomatic ceremonies; it has become public place like in the past. Today it is still a sight of official meetings and delegations with high ranking guests.

Comments:

One key issue is: **How do you study different types of visitors?**

-would be interesting to make a project on how different organization gather their numbers, as they must all approach it in different ways. For example it's the first year in Chambord that they counted all the people coming into the castle, from lectures to cultural visitors. In Warsaw the special guests are often also visitors, they are given a special tour after the event for example. In Wilanow they try to count all visitors who come to the courtyard, not just the visitors who buy a ticket. Because of the counting system, the number of people in Wilanow is officially 200,000, while there are more than 1 million in courtyard and surrounding. In Versailles visitor count is from the parking, and tickets, as you don't need a ticket to visit the grounds.

Change of foreign Visitors in Gödöllő in the last 10 years

Official ranking is from the national tourist office. It is cheap to stay in Hungary, and usually when visiting, people make a round trip. Gödöllő is a must. In terms of nationality of guests, to measure this by booking is tricky as some nationalities don't book or are non-specific about where they're from, for example Chinese guests tend to say they are 'foreign', but book Chinese audio guides.

Visitor numbers from each year show the economic situation of world. In 2001 35% foreign, now it is the same, there is a rise in total but no rise in percentage of foreign visitors. In 2001 there were 360 travel agents holding tickets for their guests, this year only 120.

The question is why? Shorter stay, less money, 25km from Budapest, new ways and content of official tourism in Hungary. Now it is no longer spring festival and high culture which is most popular, but Zeiget festival, pop culture is what it is famous for. Cities of Vienna and Prague spend more money on tourism marketing than Hungary. In 2009 the national airline went Bankrupt. There are agencies that collect guests from hotels and take them on special tours, which doubled the number of visitors this year. These can be obtained by visitors at hotel receptions, and airport.

Comments:

The number of travel agencies decreasing is likely because many of them merged or went bankrupt, not because the number of customers decreased.

KULMON – Cultural Monitoring Programme (SPSG)

Charlottenburg Palace in Berlin participated in the KULMON project:

It is a systematic casual monitoring for cultural institutions with high touristic attraction. Interviews were made by an external company, for each of the 21 institutions, and took place from 2008 to 2012. Concerning the method, there were face to face interviews, interviewers had blackberries so results were immediately transferred to server, and visitors were interviewed in 3 languages, English, German and Spanish. The questionnaire was divided into 2 parts. A general one which was valid for all institutions and an individual one which was only valid for a branch. They belonged to the branch 'museums'. So the questionnaire contained questions about visitor profile, country of residence, communication channels, channel of distribution, movement profile of the main tourists, and satisfaction. On the database you can filter your results, depending if you want to see your results to compare with other museums or just the demographic data.

Results:

Travel guides, guide magazines and books about Berlin are very important to them, high above the average, the importance of flyers and tourist information. 52% of visitors are foreign. A comparison between the international markets of 'visit Berlin' which is the marketing company for Berlin; The decline for example of the Netherlands 1.8%, but Dutch visitors are very important for them, 3rd place in the ranking. Overview about the movement profile; visitors are also attracted to art museums, galleries, historical museums and guided tours, so here is potential for co-operation with other institutions. Satisfaction Rate, in terms of cleanliness for example, admission charge, café and restaurant. With this benchmark information you can really classify your own results.

Comments:

Who initiated this project? 'Visit Berlin' which is tourist organization in Berlin. There was an official advertisement, so all interested cultural institutions could apply for it.

A New audience Segmentation study based on people's values and attitudes to Culture and Heritage (HRP)

HRP heavily reliant on international tourism, their big objective is to increase their domestic markets by 50% over the next 7 years. Marketing company Morris Hargreaves McIntyre made a core survey and sold it to cultural institutions; British museum, National Trust etc. also use it; it has broad questions, then more specific questions tailored to their palaces.

A new audience segmentation study:

Psychographic approach; why people do things, their balance and attitudes to culture and heritage. Focused on how people feel and think rather than their behaviour and attitudes. Based on 6.5 thousand adults, around the UK, to equate to 95% of the UK population. One broader cultural market; those who have visited cultural museum or heritage site, 46 million, and a smaller market; those who have visited a castle museum, 32 million. Awareness is very high, 89% of people have heard of residencies however only 5% say they would actually be prepared to visit. A marketing campaign to convert the awareness into action.

Culture Segments:

Based on very key factors in people's lives, with a section on the website where people can learn which 'cultural segment' they are in, to create interest. Examples are:

Expression: Core audience, loyal to HRP, as is their family, willing to try anything, events, acting etc.

Essence: Feel they are experts in cultural heritage, would visit museums and exhibitions on their own, don't like mass market tours, they are well read and know what they want to see. Enrichment: these are an older traditional audience interested in gardens, nature, jubilee celebration, traditional celebrations. Stimulation: like to go first, tell other people what they do. Like more contemporary things. Entertainment: don't have an interest in cultural heritage, but go along for a social day out.

Perspective: have their own interests and skip to those interests. Release: young families who used to be very interested in culture, but now don't have time, so use it to socialize and spend time with friends and family.

Surveys:

Asking what programs and events would people like? Food festivals, theatre, music, what kind of interpretations do they like once they're in the museum? Do they like to be left alone, a tour, audio guides? Which media do they consume? For example which newspapers are they interested in? And how do they behave online? How do they go around when they visit? Then they did a specific survey on their membership programme, 30% of their membership are lapsing, so why are they lapsing? TGIS is a national survey across UK that constantly updates which brands and media people like. Another basic demographic survey, how old people are and where they live, so have placed the value and demographic data over the other data.

Comments:

-How much have they been able to act on the audience segmentation results? At this point there is detailed documentation, portraits of each of the 13 segment, now at stage of planning to look at a 14th and 15th. Exhibition plans will be made in order to appeal to what they know about each segment. Training sessions on what it means, how it works.

Visitor Feedback on Schönbrunn Palace

Use of electronic transmitters; at the end of visits to constantly monitor visitors. Results from 2012, and results from 2013 up to September. Have made a combined ticket to increase the numbers of visitors and it has worked very well. Type of visit, mostly adults, 12% children, complimentary tickets are mainly for tour guides.

How visitors get information:

Through friends, so concerned that the rate of recommendation must be constantly high. A question they ask visitors is 'would you recommend the palace or not?' It's a problem in the summer when it's too hot. Travel guides are very important. Internet is on the rise and has been for years and is very important, social platforms to be monitored constantly to make sure rates are constantly high.

Visitor Nationalities:

Germany and Italy very strong. Visitors from Czech Republic, Hungary, Poland etc. aren't as evident as they come in bus tours, and don't stay overnight in Vienna, and the study is taken of individual visitors.

Research:

Why do people come and visit the palace? It's hot in the summer, long queues, quite expensive, and seeing something that has been there for 300 years. The main reason is to walk in history. Were visitor expectations fulfilled? Large percentage says yes. Social demographics. More women than men. In Austrian museums, students up to 18 years old have free entrance, government pays for their entrance, but don't pay the museum for their entrance, so Schönbrunn couldn't afford to do this, but thankfully schools are still coming. 40% of the Internet visitors are Austrian, visit homepage but don't visit the palace. Possible to buy tickets online but not a lot of people avail of this. Trying to model themselves on the Alhambra in Spain, where there are a very high percentage of online tickets.

Comments:

Booking online with 7 days to use ticket, HRP has this service.

-Buying a ticket from mobile platform, would be an incentive, if could do it from queue.

-Versailles is seeing, most foreigners don't book online, but national visitors doing.

-People often don't know where to buy online tickets on the website, they don't go onto website for that, but rather for information, job on the website to get people from info to buying, and this must be implemented correctly.