SENTOMUS

FIRST EUROPEAN LARGE-SCALE RESEARCH ON AUDIENCE PARTICIPATION IN MUSEUMS

REPORT ON EUROPEAN DATA

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0. INTRODUCTION TO THE STUDY

We present to you the European research report of the first large-scale audience survey of Museums in Europe, with a focus on Belgium, Germany, Austria, France and the Netherlands.

The present study not only aims to provide museums in Europe with insights into the behaviour of their audiences, but also to inform them about the characteristics, behaviour, expectations and motives of their visitors. In that respect, it is an audience survey, in combination with a survey of potential users. Such research is essential knowledge for qualitative museum operations (Van Ransbeeck, Roose & Vander Stichele, 2015). From such research, museum staff and/or managers can obtain information about matters such as who their (non-) participants are, what else they do in their free time, what they value most and what their expectations are. It can lead to more targeted marketing goals, but also to adjustments to the more general strategic policy objectives of the organisation. Secondly, the research can also provide crucial information to policymakers about the role of museums within society and about the expectations and needs of their citizens.

In 2023, museums in Europe were given the opportunity to register for a large-scale audience survey. The research was offered in the Netherlands, Germany, Belgium, France, Austria, Italy and Spain. This research was carried out through an academic partnership with the University of Antwerp (Prof. Dr. Annick Schramme, Nathalie Verboven), University of Groningen (Prof. Dr. J.A.C. Kolsteeg), the University of Venice (Prof. Dr. Francesco Casarin, Phd. Giulia Cancelieri), the University of Bordeaux (Prof. Dr. Juliette Passebois-Ducros), the University of Hildesheim (Prof. Dr. Birgit Mandel) and the University of Valencia (Prof. Dr. Manuel Cuadrado). The research was supported by NEMO (Network of European Museum Organisations), Deutscher Museumsbund, Museum Association (Netherlands), ICOM (Belgium) Flanders, ICOM France, ICOM España, ICOM Italia and ICOM Österreich.

More than 150 museums participated in the Sentomus study in 2022 up to 2024. Together, they reached more than 51,000 respondents. In 2022, a pilot study of Sentomus was organized in Belgium (Flanders and Brussels). This study will also be referenced throughout this report. Through this pilot study, 50 museums participated in Sentomus. In the European rollout in 2023, another 100 museums participated, adding up to over 150 museums in this study.

The study period ran from 1 June 2023 to 30 April 2024. We spanned a fairly long research period, including both school holidays and regular work weeks. This was to avoid possible seasonal effects as much as possible. Within this period, museums were able to communicate about the research and survey their audience when it suited them best. The public survey questioned the public in depth about all relevant domains linked to the museum's visit. There was not only the opportunity to question actual visitors, but also former visitors and non-visitors.

The aim of the research is to give the individual museum insight into their own public and operations. The focus of the research is therefore primarily on the individual museum and their audiences In each survey, the local infrastructure, operation and offers were therefore adapted to the reality of the individual museum. All museums started from the same general questionnaire, so that comparisons can be made with each other, but the surveys were personalized to the reality of each individual museum, including the possibility to add extra questions on the local level too.

The surveys were mainly conducted online. The participating museums were given a unique survey link that could be distributed, along with a number of supporting communication materials and a briefing. The aim was to make the research widely known, so that not only visitors, but also former visitors and non-visitors could be reached, without giving the museum staff too much work with the research. There was also the possibility to question visitors live in the museum where visitors could be approached at random. This could be done on paper or by tablet / mobile phone. This option was used by a limited number of museums. The call to participate in the survey was distributed in many ways through the participating museums: newsletters, website, social media, flyers, communication via the city or municipality, addressing people in the museum, etc. The statements in this report are therefore about the group of respondents reached.

The answers of respondents who did not complete the entire survey will also be included inthe frequency tables. Later in this report, you will see the number of respondents who answered this question for each table. To stimulate response, respondents could win prizes (travels) and for every completed survey, $1m^2$ of endangered rainforest was saved through the recognized organization World Land Trust.

In this report we discuss in more detail the approach of the research, the research design used as well as general figures and analyses at European, country and cluster level. We also compare with existing figures from previous studies and general data relating to the European population. Participating museums can also use this overall report to compare and to see what is the position of their own museum-specific data (benchmark). In order to simplify this comparison at museum level, individual reports were also drawn up. These were already delivered to the participating museums in the Spring of 2024 and contain data on their own audience data in relation to their clusters, the European and country analysis.

Each table in this report presents the results of the participating museums to Sentomus in Europe. Results are also displayed from different types of "clusters"; groupings of similar museums where relevant. On the one hand, clusters were created on the basis of "type of museum", on the other hand, clusters were created on the basis of "size" of the museum. Finally, in some cases also the country-specific results of the German, Dutch and Flemish museums are displayed in case of remarkable differences?

For some questions, there was the possibility to give feedback via open input fields. For the readability of this overarching report and to guarantee the privacy of individual museum results, the written answers are not included and can be found in the individual research reports that were given to the participating museums.

We would like to point out that the results you will read are the representation of a measurement at a certain point in time. It is important to read the results below and interpret them within their national/local context and clusters.

We thank sincerely all partners and participants to the research, and hope you enjoy reading this report!

1. FOCUS AND RESEARCH DESIGN

The need for information and figures relating to the audiences of the museum/heritage sector in Europe has only grown over the last few decades. Many museums are doing regular public surveys. With the current research, we want to meet this need for measurement and data again, but from a different perspective. We have organised a large, European audience audience survey that asked the participants in depth about all relevant themes regarding their behaviour, needs and expectations. For the questionnaires we used topics that were regularly discussed in previous surveys, supplemented with questions tailored to current needs: profile of the users, satisfaction with the offer, activities, digital offer, etc. In addition, for the first time, extensive attention was also paid to the impact of museums on psychosocial well-being (see later).

In addition to quantitative impact factors, impact also occurs in a qualitative sense. Recent research demonstrates that participation in culture has also impact on both cognitive effects (via education, for example), and an impact on health or social cohesion (in addition to its economic value) (Pascal Gielen, Sophie Elkhuizen, Quirijn van den Hoogen, Thijs Lijster and Hanke Otte, The Value of Culture, 2014.)

In 2019, the Arts and Humanities Research Council in the UK initiated 'The Cultural Value Project', which also focused on the social value of culture. The aim of this project was to investigate how culture translates into impact and value, and how the concrete impact and value of culture can be measured using empirical and analytical methods. The latter research forms the basis of the impact section of this research report (see further). With the current research, we want to lay the foundation for a new qualitative measuring instrument for audience research in museums. With this research, we want to make it possible to repeat this in a systematic way and to investigate it on a broad scale, so that it is really useful for the museums and requiring minimal time investment from the museum staff and minimal financial investment by the participating museum.

Based on the collected data, this research aims to answer the following questions:

- What are the profiles, satisfaction and motivations of (frequent and occasional) visitors and non-visitors of museums in Europe?
- What developments can we detect based on previous research (to the extent possible)? And do we see specific differences between countries or types of museums?
- Which remarkable trends and differences in appreciation, preferences and needs do we notice based on the collected feedback.

The following sub-questions are included:

- Why do people visit a museum? And which communication channels do they use to inform themselves?
- How satisfied are the respondents with the offer, infrastructure, and accessibility of the museums?
- What impact does a visit to a museum have on the well-being of its users?
- To what extent the pandemic has boosted the digital transformation of museums and how is this experienced by visitors. What do visitors consider desirable for the museum of the future?

In order to achieve the research objectives above and to answer the research questions, we used different research methods and made use of different types of sources. A survey forms the basis of the research. In concrete terms, we used a standardized 'intelligent' questionnaire that was developed in co-creation with the academic partners and the museums themselves. The questionnaire has different branches depending on the profile of the respondent, based on the answers to specific questions. This method allows us to make relevant statements about a large population, with both general descriptive figures and in-depth insights based on more complex statistical analyses. In addition, this technique of questioning also makes it possible to set up future surveys in the same way and to perform longitudinal analyses. This process was supported by a research platform developed for the cultural sector, allowing museums to easily personalize the general questionnaire, to support museums in the communication about the study and to provide live research results at all times.

The questionnaire was drawn up on the basis of existing surveys that have been carried out in museums, cultural centres and libraries. The basis of our current research was the questionnaire that we developed in collaboration with ICOM (Belgium) Flanders for the pilot study in Flanders (Belgium) and Brussels in 2022. The questionnaire was updated and supplemented with research topics that were proposed by the diverse research teams involved in the project from different European countries. Before the questionnaire was finalised, it was checked by our steering group (see above) and translated into the different languages of the countries of all participating museums. In this way the respondents had the choice of the language in which they wanted to fill in the survey. The questionnaire also went through a trial period and was extensively tested in advance. In this respect, we paid particular attention to the use of language by submitting it to experts in the field of low-threshold communication. This is to ensure that the questionnaire is sufficiently understandable and accessible for all levels of the population.

Finally, the individual museums were given the opportunity to add a few questions of their own at their questionnaire, specific for their context. We used a 70/20/10 approach for this. 70% of the questionnaire is the same for all museums. 20% was supplemented based on the expertise of the local researching teams (academic partners) and the intermediary museum organizations. These questions were also included for all museums linked to a specific country. Finally, 10% of the survey was free to be filled in by the museums themselves. The results of these last questions were only included in separate individual reports.

2. METHODOLOGY

The biggest advantage of an online survey is that it is relatively easy to implement and provided that you have the necessary knowledge, it can be easily analyzed statistically. It also allows discovering differences between subgroups. The online survey is also fast, easy and relatively cheap, certainly in comparison with other methods such as conducting surveys via interviewers or by post. Respondents also complete the questions when it suits them, and they experience complete anonymity when completing them.

However, also this research method has its limitations. The first limitation when using the survey is that it is not a purely random sample but a questionnaire that was mainly broadcast via multiple museum communication channels. Although commonly practiced in 'market research', in theory this could lead to a self-reinforcing effect, where potentially specific types of respondents would be more willing to answer to the surveys than others. This method of recruitment could overrepresent certain groups that are more likely to complete questionnaires compared to other groups. The population that we want to study here are (frequent and occasional) visitors and non-visitors of museums Europe. In this study, we therefore make statements about the visitors and non-visitors of the participating museums; the study does not claim to make statements about the broader population.

Also for country-specific comparisons there are some limitations. As noted there were more museums participating in Germany and the Netherlands, compared to the other participating countries, and thus more German and Dutch respondents answered to the survey by consequence. As will be noticeable in the report below, the percentage differences between Germany and Europe are often small or within the margin of error due to the fact that 50% of respondents come from Germany. So we must be careful in generalizing these country-specific results. In addition, error tolerances must be applied relatively generously, as these are not random samples in the strict statistical sense, as mentioned above.

The respondents' answers can however provide an indication for the wider population of museum visitors. After all, the size of the dataset allows statements to be made about the behaviour, satisfaction and motivations of visitors to all types of museums.

Before the analyses were started, the database was of course also cleaned up. Redundant or inconsistent data, hardly completed questionnaires and test answers were removed from the dataset. We also checked for impossible answers or combinations, although such impossible answers were already strongly excluded via the controls that were built into the programming of the questionnaire. In this way, we were left with a dataset that was as complete as possible.

3. CLUSTERS

Museums can position themselves within the European museum sector, and can compare their individual results with the results of similar museums in their cluster. Comparing many museums is always partly arbitrary, but adds additional nuance to the national and general overarching results. Two forms of clustering were chosen:

- Size of the museum, based on the number of full-time equivalents working there (number of FTE or FTE).
- Type of museum, where museums were grouped together based on the museum's offerings.

In order to prevent museums with a very high number of responses from influencing the cluster and country results too much, a maximum of 375 respondents were taken into account for each museum when calculating the results of the clusters (and the European results). Among museums that received more than 375 respondents, 375 respondents were randomly chosen. Priority was given to completed surveys. For each question the same selection of respondents was used for the European results, and the results for both clusters. For country-specific data and the results of the reports of the individual museums, the whole dataset was used, however. The museums that participated in the pilot study in Flanders (Belgium) and Brussels, are not included in this report, as the questionnaire evolved significantly between the pilot study and the European Sentomus study in 2023-2024.

If we look at the clusters based on the size of the museum, and thus on the basis of the number of full-time equivalents working there, the following clusters were created:

- Cluster FTE 1: less than 5 employees (FTE) – 11 museums
- Cluster FTE 2: 6 to 25 employees (FTE) – 42 museums
- Cluster FTE 3: 26 to 50 employees (FTE) – 23 museums
- Cluster FTE 4: more than 50 employees (FTE) – 27 museums

Below you will find an overview of the division of the participating museums into the clusters based on the number of employees.

Cluster FTE 1 (11)	Brutus; CoSA - Center of Science Activities; Cuypershuis; Fuggerei; Gedenkstätte Hinzert; Märklineum; Museum Haus Opherdicke; Museum in der Osterburg Weida; Museum of the 20th Century; Tuchmacher; Museum Bramsche; Wikinger Museum Haithabu
Cluster FTE 2 (42)	AlliiertenMuseum; Bach Museum Leipzig; Brandenburgisches Landesmuseum für moderne Kunst; Deutsches Uhrenmuseum; Fondazione Querini Stampalia; Fort Island Pampus; Franconian Freiland Museum Fladungen; Gedenk- und Bildungsstätte Andreasstraße; Osthofen Memorial; GRIMMWELT Kassel; Heidi Horten Collection; Herzog Anton Ulrich Museum; Jagdmuseum und Landwirtschaftsmuseum Schloss Stainz; Kapuzinergruft; Kleist Museum; Landeszeughaus; Ludwigsburg Museum; Musée des beaux-arts, La Cohue; Musée du Temps; Girodet Museum; Museum De Waag; Museum für Kommunikation Nürnberg; Museum für Sepulkralkultur; Lüneburg Museum; Oberschönenfeld Museum; Museum Van Loon; Natural History Museum; Brabant Nature Museum; Dutch Silver Museum; Oyfo Museum of Technology; Panorama Museum; Schloss Trautenfels; Nationalpark-Zentrum mit Schlossinsel und museumORTH; Shoe Quarter; Toy Museum Deventer; Stadtschloss Fulda; Stedelijk Museum Kampen; Stedelijk Museum Schiedam; Stiftung Bundeskanzler-Adenauer-Haus; VILLA Franz Erhard Walther; Volkskundemuseum am Paulustor; Vonderau Museum
Cluster FTE 3 (23)	Amsterdam Museum; Braunschweigisches Landesmuseum; Discovery Museum; Freilandmuseum Oberpfalz; Freilichtmuseum Molfsee; FRida & freD - Das Grazer Children's Museum; Hamburger Kunsthalle; Castle de Haar; Kunsthaus Graz; Dachau Concentration Reserve; Landesmuseum Hannover; Musée des beaux-arts et d'archéologie; Museum De Lakenhal; Museum of Modern Salzburg; Museum für Geschichte; Museum für Kommunikation; Wiesbaden Museum; Museum Island, Schloss Gottorf; Museum of Natural History; Neue Galerie Graz; Saarland Museum – Modern Gallery; Eggenberg Castle; Space Expo
Cluster FTE 4 (27)	Albertinum; Sound & Vision; Belfry; Centraal Museum Utrecht; Deutsches Historisches Museum; Eye Film Museum; Gemäldegalerie Alte Meister; GRASSI Museum für Völkerkunde zu Leipzig; Groeninge Museum; Gruuthusemuseum; Japanisches Palais; Kunstgewerbemuseum; Mathematical-Physikalischer Salon; Museum of Saxon Folk Art; St. John's Hospital Museum; Nationalmuseum für Naturgeschichte Luxembourg; Naturhistorisches Museum Wien; New Institute; Church of Our Lady Museum; Porzellansammlung; Residenzschloss; Rijksmuseum; Schloss Sanssouci; Bruges City Hall; Van Gogh Museum; Folklore Museum; ZKM | Zentrum für Kunst und Medien Karlsruhe

If we look at the clusters based on the type of museum, and therefore on the basis of the offer of the museums, the following clusters were created:

- Cluster A: History, Archaeology, Heritage, Place of Remembrance – 46 museums
- Cluster B: Modern Art, Contemporary Art, Applied Arts – 25 museums
- Cluster C: Physics, Technology, Science – 18 museums
- Cluster D: Ancient Arts & Fine Arts – 14 museums

Below you will find an overview of the division of the participating museums into clusters based on type of museum.

Cluster A (46)	AlliiertenMuseum; Amsterdam Museum; Belfry; Braunschweigisches Landesmuseum; Deutsches Historisches Museum; Fort Island Pampus; Franconian Freiland Museum Fladungen; Freilandmuseum Oberpfalz; Freilichtmuseum Molfsee; Fuggerei; Gedenk- und Bildungsstätte Andreasstraße; Gedenkstätte Hinzert; Osthofen Memorial; GRASSI Museum für Völkerkunde zu Leipzig; GRIMMWELT Kassel; Gruuthusemuseum; Japanisches Palais; Kapuzinergruft; Castle de Haar; Dachau Concentration Reserve; Landesmuseum Hannover; Landeszeughaus; Ludwigsburg Museum; Museum De Waag; Museum für Geschichte; Museum of Saxon Folk Art; Museum in der Osterburg Weida; Lüneburg Museum; Oberschönenfeld Museum; St. John's Hospital Museum; Museum Van Loon; Museum Island, Schloss Gottorf; Church of Our Lady Museum; Residenzschloss; Eggenberg Castle; Schloss Sanssouci; Schloss Trautenfels; schlossORTH Nationalpark-Zentrum; Bruges City Hall; Stadtschloss Fulda; Stedelijk Museum Kampen; Stiftung Bundeskanzler-Adenauer-Haus; Folklore Museum; Volkskundemuseum am Paulustor; Vonderau Museum; Wikinger Museum Haithabu
Cluster B (25)	Albertinum; Bach Museum Leipzig; Sound & Vision; Brandenburgisches Landesmuseum für moderne Kunst; Brutus; Eye Film Museum; FRida & freD - Das Grazer Children's Museum; Heidi Horten Collection; Kleist Museum; Kunstgewerbemuseum; Kunsthaus Graz; Märklineum; Museum of Modern Salzburg; Museum of the 20th Century; Dutch Silver Museum; Neue Galerie Graz; New Institute; Panorama Museum; Porzellansammlung; Saarland Museum – Modern Gallery; Shoe Quarter; Toy Museum Deventer; Stedelijk Museum Schiedam; Tuchmacher Museum Bramsche; VILLA Franz Erhard Walther
Cluster C (18)	CoSA - Center of Science Activities; Cuypershuis; Deutsches Uhrenmuseum; Discovery Museum; Jagdmuseum und Landwirtschaftsmuseum Schloss Stainz; Mathematical-Physikalischer Salon; Musée du Temps; Museum für Kommunikation; Museum für Kommunikation Nürnberg; Museum für Sepulkralkultur; Nationalmuseum für Naturgeschichte Luxembourg; Natural History Museum; Naturhistorisches Museum Wien; Museum of Natural History; Brabant Nature Museum; Oyfo Museum of Technology; Space Expo; ZKM | Zentrum für Kunst und Medien Karlsruhe
Cluster D (14)	Centraal Museum Utrecht; Fondazione Querini Stampalia; Gemäldegalerie Alte Meister; Groeninge Museum; Hamburger Kunsthalle; Herzog Anton Ulrich Museum ; Musée des Beaux-Arts et d'archéologie ; Musée des Beaux-Arts, La Cohue ; Girodet Museum; Museum De Lakenhal; Museum Haus Opherdicke; Wiesbaden Museum; Rijksmuseum; Van Gogh Museum

4. KEY FINDINGS

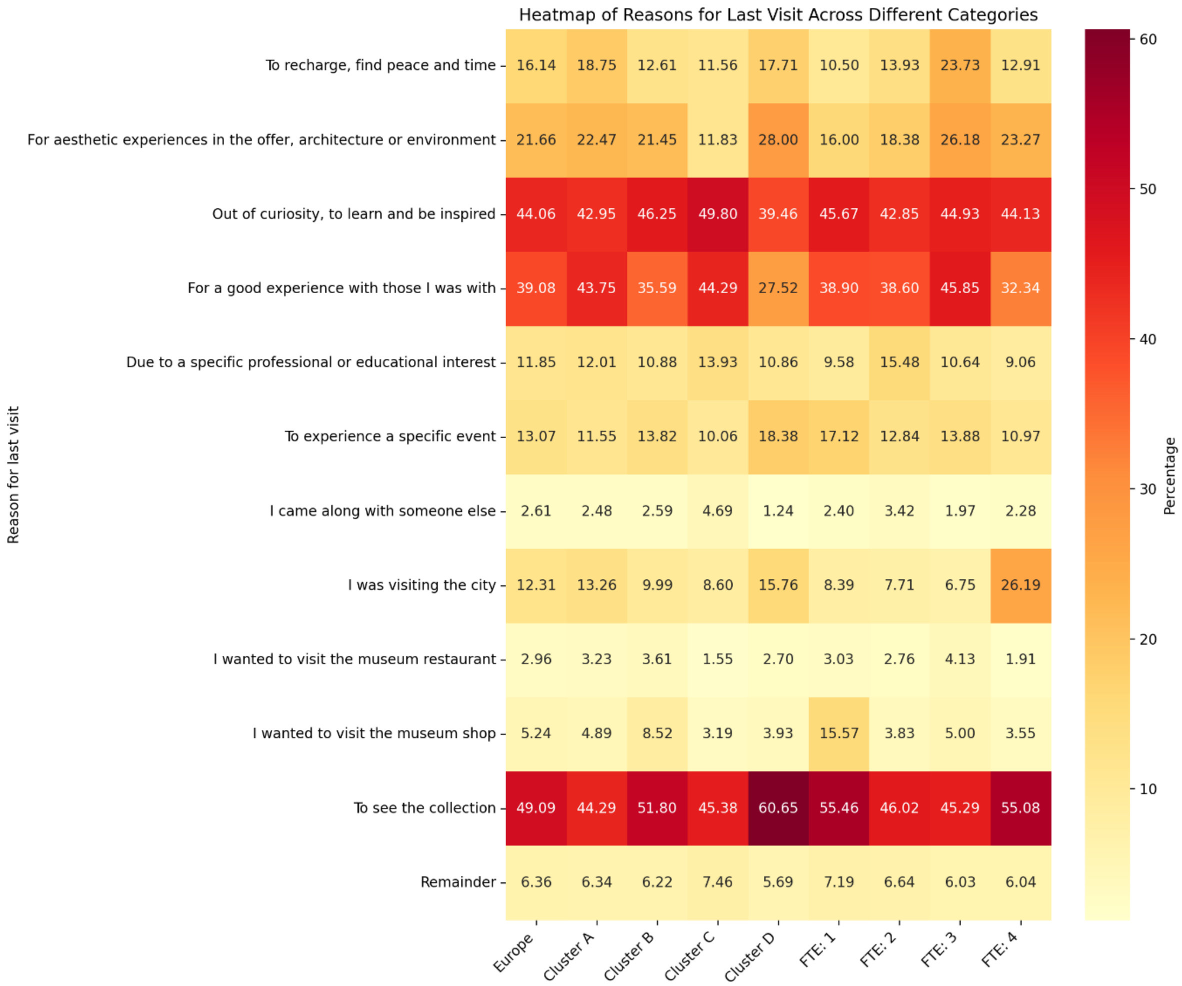
The next chapters of this report describe in depth the different results of all questions in the Sentomus study, for Europe and per type and size category of museums. Before sharing these detailed results, we first describe in this chapter some key trends and findings that were discovered with the in-depth analysis of the data.

We start by describing the motivations to visit a museum, and analyze potential differences for gender, age, region of birth and size of museums. We look for the same potential trends in museum satisfaction, the impact of the museum on the well-being of its visitors and finally for the "museum of the future". For each theme in this chapter, different samples have been taken in the total set of the European respondents, making sure that all relevant questions were answered by all respondents when doing certain analytical tests.

MOTIVATIONS TO VISIT THE MUSEUM

In this first paragraph, we look at the motivations why people visit a museum.

If we analyse **the reason** for the last museum visit, 49% of the European respondents (logically) indicated that **they wanted to view the collection**. Curiosity, learning and being inspired were mentioned by 44% of respondents in Europe. 39% said they wanted to have a fun experience with the company they were in. However, we see strong differences between the clusters here. There are no significant links between museum size and reasons for the museum visit, but the type of museum has a strong correlation with the reason for visiting. Logically, aesthetic motivations are a lot less relevant in Cluster C, which are the museums focused on Physics, Technology, Science. Social motivations (27,52%) and curiosity (39, 46%) on the other hand are a lot less relevant for museums in Cluster D, compared to the other types of museums.


Heatmap of Reasons for Last Visit Across Different Categories
Reason for last visit
Percentage
To recharge, find peace and time 16.14 18.75 12.61 11.56 17.71 10.50 13.93 23.73 12.91
For aesthetic experiences in the offer, architecture or environment 21.66 22.47 21.45 11.83 28.00 16.00 18.38 26.18 23.27
Out of curiosity, to learn and be inspired 44.06 42.95 46.25 49.80 39.46 45.67 42.85 44.93 44.13
For a good experience with those I was with 39.08 43.75 35.59 44.29 27.52 38.90 38.60 45.85 32.34
Due to a specific professional or educational interest 11.85 12.01 10.88 13.93 10.86 9.58 15.48 10.64 9.06
To experience a specific event 13.07 11.55 13.82 10.06 18.38 17.12 12.84 13.88 10.97
I came along with someone else 2.61 2.48 2.59 4.69 1.24 2.40 3.42 1.97 2.28
I was visiting the city 12.31 13.26 9.99 8.60 15.76 8.39 7.71 6.75 26.19
I wanted to visit the museum restaurant 2.96 3.23 3.61 1.55 2.70 3.03 2.76 4.13 1.91
I wanted to visit the museum shop 5.24 4.89 8.52 3.19 3.93 15.57 3.83 5.00 3.55
To see the collection 49.09 44.29 51.80 45.38 60.65 55.46 46.02 45.29 55.08
Remainder 6.36 6.34 6.22 7.46 5.69 7.19 6.64 6.03 6.04
Europe
Cluster A
Cluster B
Cluster C
Cluster D
FTE: 1
FTE: 2
FTE: 3
FTE: 4
60
50
40
30
20
10

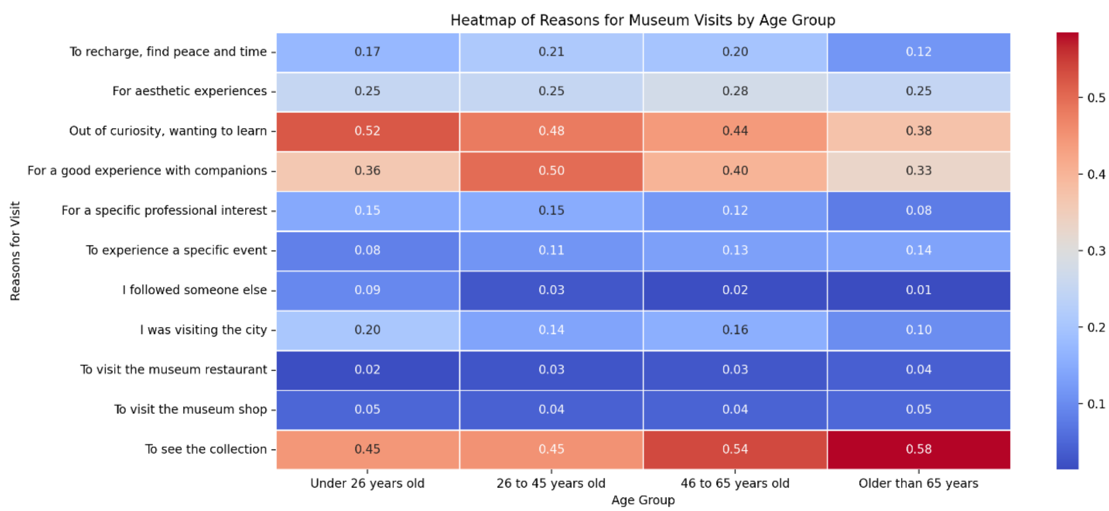
Let’s look at the potential impact of different factors in reasons why to visit a museum.

BY AGE GROUP

We divided the respondents in “age groups”, categorizing each person into one of four categories. We used a selection of the respondents that answered to all relevant questions for this particular analyses.

Age Group	Number of respondents
Under 26 years old	624
26 to 45 years old	2912
46 to 65 years old	4615
Older than 65 years	2887
Total	11038

Let’s look at the results per age group. The heatmap shows the biggest percentages in dark red, the smallest in light blue. (0.5 = 50% of respondents who indicated “yes” to that answer option)



Statistically significant differences were found for all reasons for visiting museums across age groups, except for the reason “to visit the museum shop”.

Looking at the mean values for each reason across age groups, we can observe some interesting patterns:

- "Out of curiosity, wanting to learn and be inspired" is the most popular reason across all age groups, with the highest percentage in the "Under 26 years old" group (52%).
- Together with “out of curiosity”, is "To see the collection" particularly important for all the age groups, with a strongest importance for the "Older than 65 years" group (58%) and the “46 to 65 years" group (54%).
- "For a good experience with companions" is most important for the "26 to 45 years old" group (50%).
- "To recharge, find peace and time" is least important for the "Older than 65 years" group (12%).
- "Following someone else" is most common in the "Under 26 years old" group (9%).

These findings suggest that different age groups have varying motivations for visiting museums.

We found some interesting age progression trends:

- "To recharge, find peace and time" shows a slight increase from the youngest to middle-age groups, then decreases for the oldest group.
- "For aesthetic experiences" remains relatively stable across age groups, with a slight peak in the "46 to 65 years old" group.
- "Out of curiosity, wanting to learn" is highest for the youngest group and gradually decreases with age.
- "For a good experience with companions" peaks in the "26 to 45 years old" group and then decreases with age.

Consistent patterns:

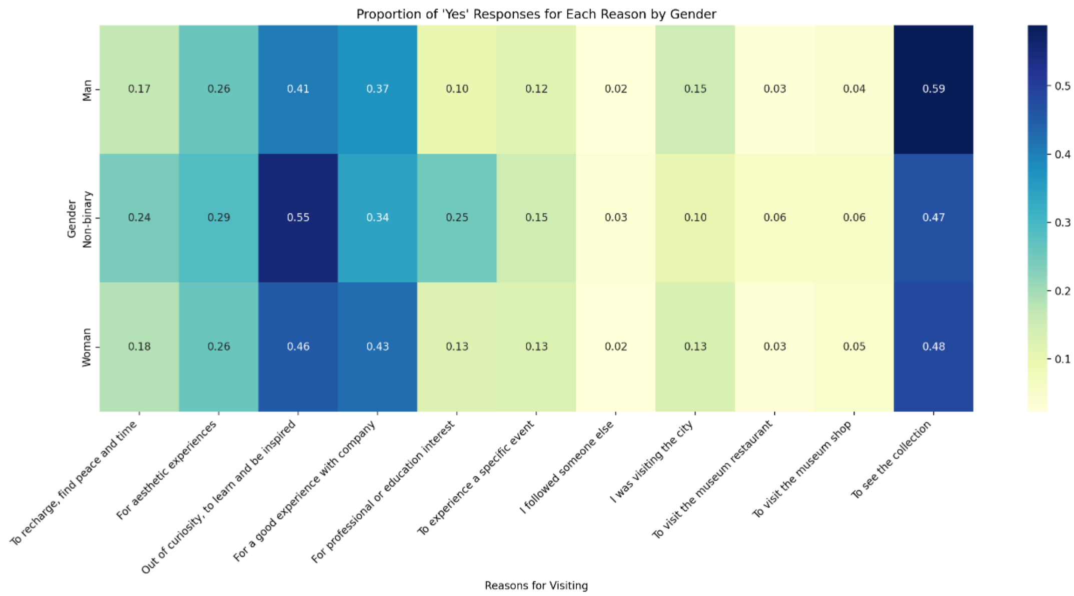
- "To see the collection" remains popular across all age groups, with a noticeable increase in the two oldest age groups.
- "To visit the museum restaurant" and "To visit the museum shop" remain consistently low across all age groups. (with no statistically relevant differences across age groups for visiting the museum shop)

Age-specific characteristics:

- The "Under 26 years old" group shows higher percentages for "I followed someone else" and "I was visiting the city" compared to other age groups.
- The "Older than 65 years" group has the highest percentage for "To see the collection" but the lowest for "To recharge, find peace and time" and "For a specific professional interest".

BY GENDER

We also investigated potential relevant differences in motivations to visit a museum, depending on the gender of the respondent. We created the following heatmap.



Also for the different genders, we found some statistically relevant differences:

- Out of curiosity, to learn and be inspired:
  - Women (46%) and Non-binary individuals (55%) show a higher proportion compared to men (41%).
- For a good experience with company:
  - Women (43%) are more likely than men (37%) to visit for this reason.
- For professional or educational interest:
  - Non-binary individuals (25%) show the highest proportion.
- To see the collection:
  - Men (59%) have a notably higher proportion than women (48%), with Non-binary individuals (47%) close to women.
- To recharge, find peace and time:
  - Non-binary individuals show the highest proportion (24%), followed by women (18%) and men (17%).
- I was visiting the city:
  - Men (15%) are slightly more likely than women (13%) to visit for this reason, with Non-binary individuals (10%) showing the lowest proportion.

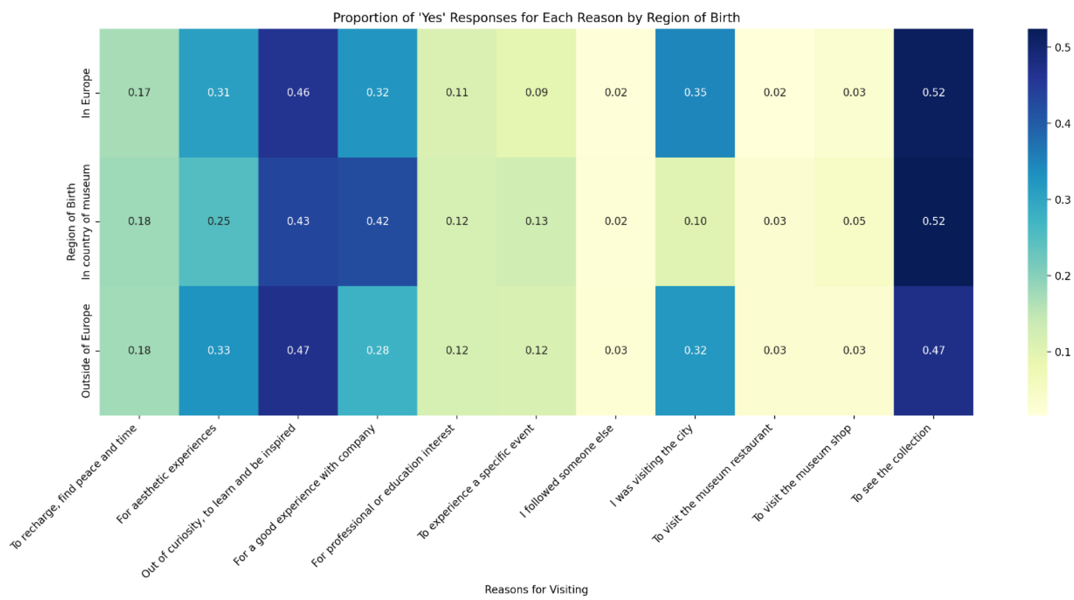
These differences suggest that gender influences motivations for museum visits:

- Women and Non-binary individuals tend to be more motivated by learning, inspiration, and social experiences than men.
- Non-binary individuals show the highest proportion for professional or educational interests compared to the other genders.
- Men are more likely to visit to see the collection or as part of a city visit than the other genders.
- Non-binary individuals are more likely to visit for recharging and finding peace.

It's important to note that while these differences are statistically significant, the sample size for Non-binary individuals is smaller, which may affect the reliability of comparisons for this specific group.

REGION OF BIRTH

We then looked for potential differences in motivations, depending on the region of birth of the respondent. Respondents indicated if they are born in the country of the museum (the museum for which they are answering the questionnaire), in Europe (not the country of the museum) or outside of Europe.



This heatmap visualizes the differences in reasons for visiting museums across different regions of birth.

Let's interpret the statistically significant differences that were found:

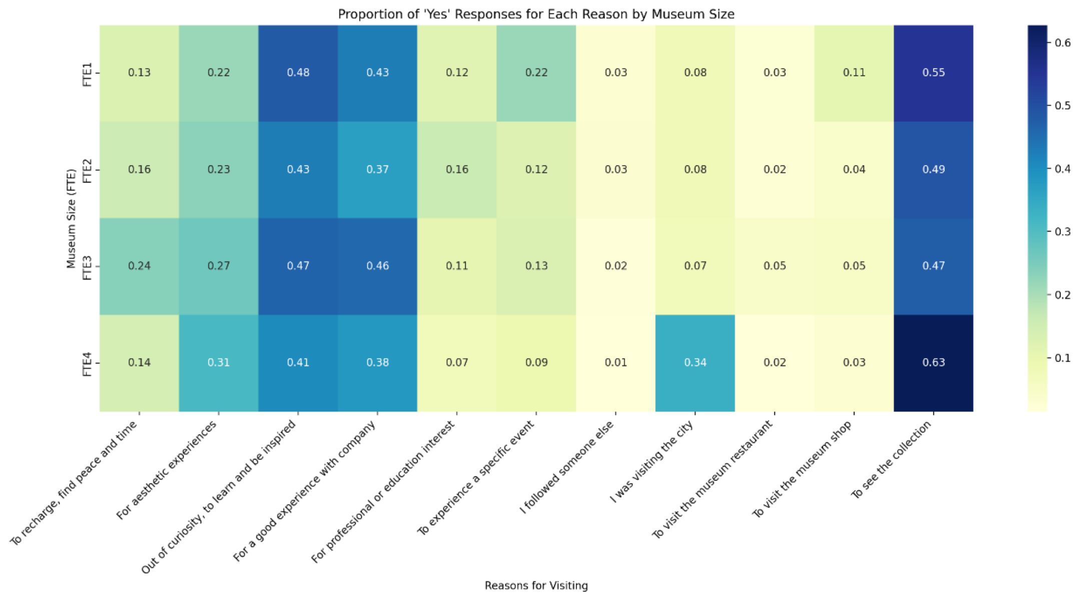
- For aesthetic experiences
    - Respondents born outside of Europe (32.8%) and in Europe (31.0%) are more likely to visit for aesthetic experiences compared to those born in the country of the museum (25.1%).
- Out of curiosity, to learn and be inspired
    - Slight differences exist, with those born outside of Europe (47.0%) and in Europe (46.5%) showing a higher proportion compared to those born in the country of the museum (43.4%).
- For a good experience with company
    - Those born in the country of the museum (42.4%) are more likely to visit for this reason compared to those born in Europe (32.5%) or outside of Europe (27.8%).
- I was visiting the city
    - Museum visitors born in another country in Europe (35%) and those born outside of Europe (32%) are much more likely to visit the museum as part of a city visit compared to those born in the country of the museum (10%).

Key insights:

1. Visitors from outside the country of the museum (both from Europe and outside Europe) are more motivated by aesthetic experiences and learning opportunities.
2. Local visitors (born in the country of the museum) are more likely to visit for social reasons (good experience with company) and for specific events.
3. People born outside the country of the museum are much more likely to visit the museum as part of their city visit.
4. The desire to see the collection is relatively consistent across all regions of birth, with no statistically significant difference.

MUSEUM SIZE (FTE CLUSTER)

Finally we investigated if the reasons to visit the museum, vary depending on the museum size. For "size" we used the cluster on FTE (Fulltime Equivalents), where FTE1 are the smallest museums, to FTE4 who are the largest museums. (See chapter 3 "Clusters").



This heatmap visualizes the differences in reasons for visiting museums across different size categories. Let's interpret the statistically significant differences. Museum size significantly influences visitor motivations.

- Seeing the collection, Curiosity and learning are strong motivators across all museum sizes.
- Large museums (FTE4) excel in attracting visitors for aesthetic experiences and city tourism.
- Medium-large museums (FTE3) are popular for tranquillity and "good company experiences".
- Medium-small museums (FTE2) are also popular for aesthetic experiences and professional or educational interests.
- Smaller museums (FTE1) lead in attracting visitors for "good company experiences" and specific events.

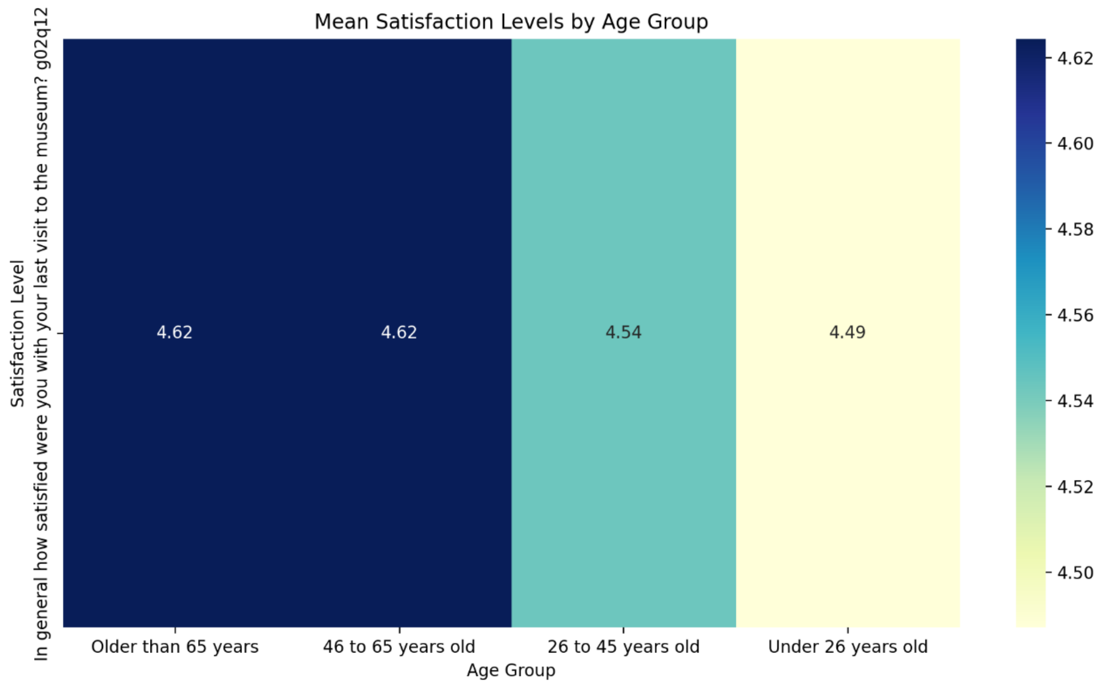
APPRECIATION: GENERAL SATISFACTION OF MUSEUM

We asked museum visitors about their "general satisfaction" with their last museum visit, varying from "not satisfied at all" to "very satisfied". In Europe in general, and at most museums individually, we notice **a very high level of satisfaction**. 65% indicate that they are very satisfied, 27% are satisfied. There are no significant differences at cluster level. However, this analysis can be very insightful at the level of the specific level of the museums in the individual reports.

Satisfaction with last museum visit	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Not satisfied at all	0,81%	0,65%	0,93%	0,73%	1,08%	0,44%	0,51%	1,21%	0,90%
Not satisfied	2,38%	2,10%	3,10%	1,73%	2,70%	1,40%	1,50%	3,04%	3,19%
Neutral	4,60%	4,52%	5,59%	4,65%	3,68%	5,23%	4,04%	5,06%	4,62%
Satisfied	27,21%	27,11%	27,26%	30,14%	25,19%	26,68%	27,35%	28,29%	26,00%
Very satisfied	64,70%	65,26%	62,78%	62,52%	67,18%	65,88%	66,31%	62,09%	65,00%
No opinion	0,30%	0,37%	0,35%	0,23%	0,17%	0,37%	0,29%	0,31%	0,29%
Total	14482	6194	3133	2193	2962	1357	5123	4213	3789

BY AGE

Let's look at the same potential differences for age, gender, region of birth and museum size. Starting with age, we investigated if the mean satisfaction level is different for the four different age groups that we defined.

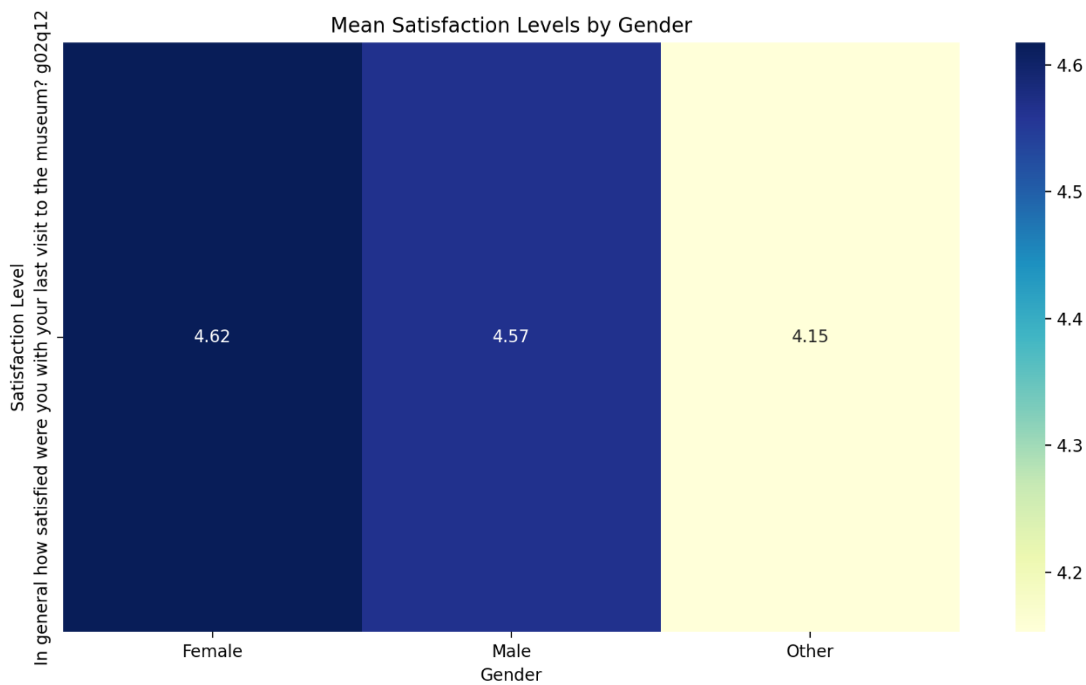


Key insights:

1. Satisfaction levels are generally high across all age groups, with older age groups showing slightly higher satisfaction.
2. The tests indicate significant differences in satisfaction levels across age groups, except for the groups "older than 65" and "46 to 65 years old".
3. Older visitors (46 to 65 years and older than 65 years) are more likely to report being "Very satisfied."
4. Younger visitors (under 26 years) have a higher percentage of "Neutral" responses compared to other age groups.

BY GENDER

The same analysis was done for potential differences in gender and general museum satisfaction.



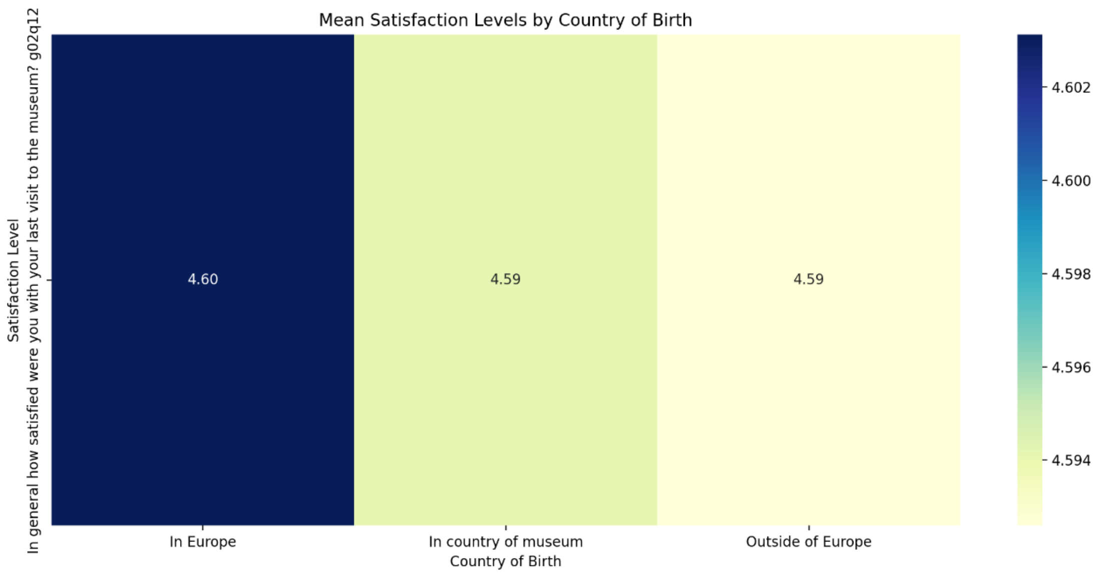
Key insights:

1. Satisfaction levels are generally high across all gender groups, with slight variations.
2. The test indicates significant differences in satisfaction levels across gender groups.
3. Women show the highest mean satisfaction level, followed by men, with non-binary having the lowest.

These insights suggest that while satisfaction is high overall, there are slight variations by gender that could potentially lead to targeted strategies to enhance visitor experiences.

REGION OF BIRTH

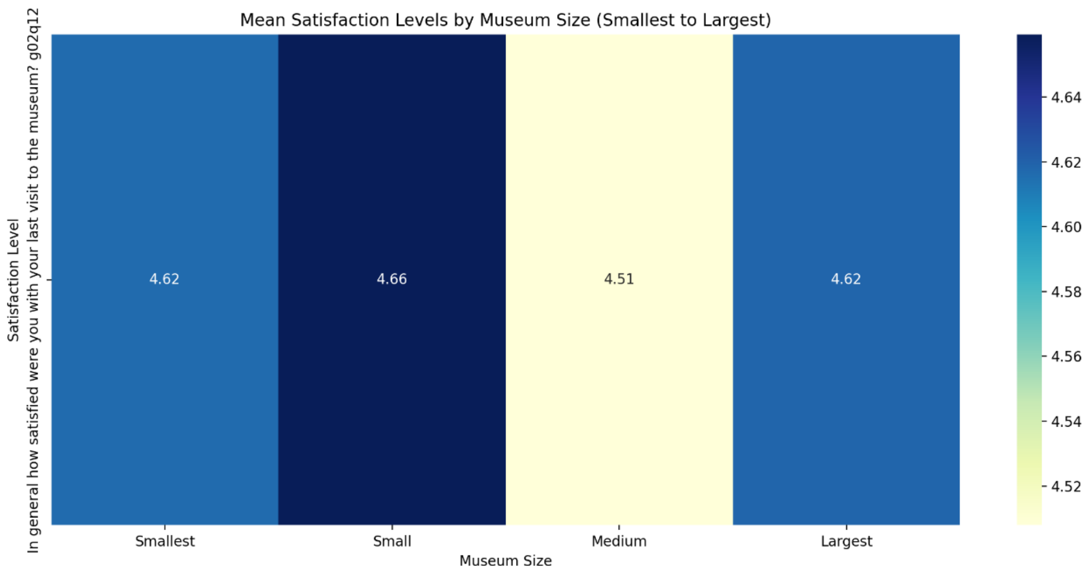
Looking at satisfaction and the region of birth, we see that there are no statistically significant differences in satisfaction levels across region of birth groups.



Key insights:

- Satisfaction levels are generally high across all country of birth groups, with mean scores around 4.60.
- The test indicates no statistically significant differences in satisfaction levels across country of birth groups.
- Visitors born in Europe have the highest mean satisfaction level, followed closely by those born in the country of the museum and outside of Europe.
- The distribution of satisfaction levels is relatively consistent across groups, with the majority of visitors reporting being "Very satisfied."

And finally we look at museum satisfaction and potential differences depending on the size of the museum.



We notice that some differences in satisfaction levels across museum sizes are statistically significant, suggesting that size does play a role in visitor experience.

Key insights:

- Overall, satisfaction levels are high across all museum sizes, with the majority of visitors being very satisfied (5) or satisfied (4).
- Small museums have the highest percentage of very satisfied visitors and the highest mean satisfaction score.
- Medium-sized museums (FTE3) have the (relatively) lowest mean satisfaction score and the lowest percentage of very satisfied visitors, although their satisfaction levels are still very high.
- Largest museums and smallest museums have similar satisfaction distributions, performing better than medium-sized museums but not as well as small museums.

IMPACT ON THE WELL-BEING OF VISITORS

Through this Sentomus study, we also measure the impact of the museum and the museum sector on the wellbeing of the participants.

Impact measurements are ubiquitous these days. The pressure to prove impact is increasing from various policy levels. Not least within the cultural sector. The focus here is usually on the economic impact of such an institution or exhibition. Ever since the first such studies in the 1970s (e.g. Cwi & Lyall, 1977), it has been generally recognised that arts and cultural institutions have a significant positive influence on income, employment and production in a certain area.

In addition to economic direct and indirect impact factors, impact also occurs in non-financial aspects. Pascal Gielen, Sophie Elkhuizen, Quirijn van den Hoogen, Thijs Lijster and Hanke Otte showed in their publication “The Value of Culture” (2014) that culture can have both cognitive effects and an impact on health and social cohesion, in addition to its economic value. All this was magnified even more during the corona crisis of 2020-2021. The value of culture became clearer than ever. In 2019, the Arts and Humanities Research Council in the UK initiated ‘The Cultural Value Project’, which also specifically focused on the social value of culture. The aim of this project was to investigate how culture translates into impact and value, and how the concrete impact and value of culture can be measured using empirical and analytical methods. Building on this, a new model was created at Roskilde Library in Denmark that measures the impact that libraries have on their audiences.

In addition to the classic measurements of satisfaction and use, which are of course very valuable and important, we took on the challenge of going further in this research. We wanted to provide insights that could further substantiate and support conversations about the museum, so that they don't just have to be about the usage and satisfaction ratings. After all, the museum is more than the number of visitors it reaches and the satisfaction of these visitors. The museum has a social function and supports the development and well-being of the population.

We base ourselves on a Danish model, created in the Roskilde library, which measures the impact that cultural institutions have on their audience. The model, in turn, is based on 'The Cultural Value Project', a comprehensive UK study initiated by the Arts and Humanities Research Council, 2019. The aim of these studies was to investigate how culture translates into impact and value, and how the concrete impact and value of culture can be measured through empirical and analytical methods.

This model has been developed to be used in quantitative studies, where qualitative research is usually used for such research questions (i.e. on a smaller scale). The impact model measures the impact of the museum through 4 dimensions:

- Safe haven
- Perspective
- Creativity
- Community

The Impact Model measures these 4 dimensions in 4 sub-aspects of the museum: the collection, the activities, the physical facilities and the support provided by the staff. Afterwards, the model comes to an average for the museum as a whole. In this study, which not only measures the impact of the museum but also many other things, it was decided to measure the 4 dimensions for 'the museum as a whole', in order to keep the research manageable for the respondent.

For each dimension, 3 sub-questions were asked, on which respondents could indicate on a five-point scale whether they agreed with the statement (ranging from 'strongly disagree' to 'strongly agree'). The model provides an option 'not relevant / I don't know', because some statements may be too abstract or not applicable for certain respondents.

The sub-questions that were asked for each dimension are as follows:

Safe Harbor

- The museum gives me a sense of well-being. (comfort, relaxation, tranquility)
- The museum arouses emotions in me. (e.g. fun, nostalgia, ...)
- The museum makes me forget other things in my life for a while

Perspective

- The museum makes me think
- The museum gives me new knowledge, broadens my perspective
- The museum helps me to think critically

Creativity

- The museum sparks my imagination
- The museum teaches me new skills (e.g. making my own art, ...)
- The museum motivates me to discover something new

Community

- Thanks to the museum, I can have interesting conversations with others
- For me, the museum is a place to meet others
- The museum gives me an insight into the lives of others. (For example, other cultures, characters in works of art, ...)

Each answer option is given a score:

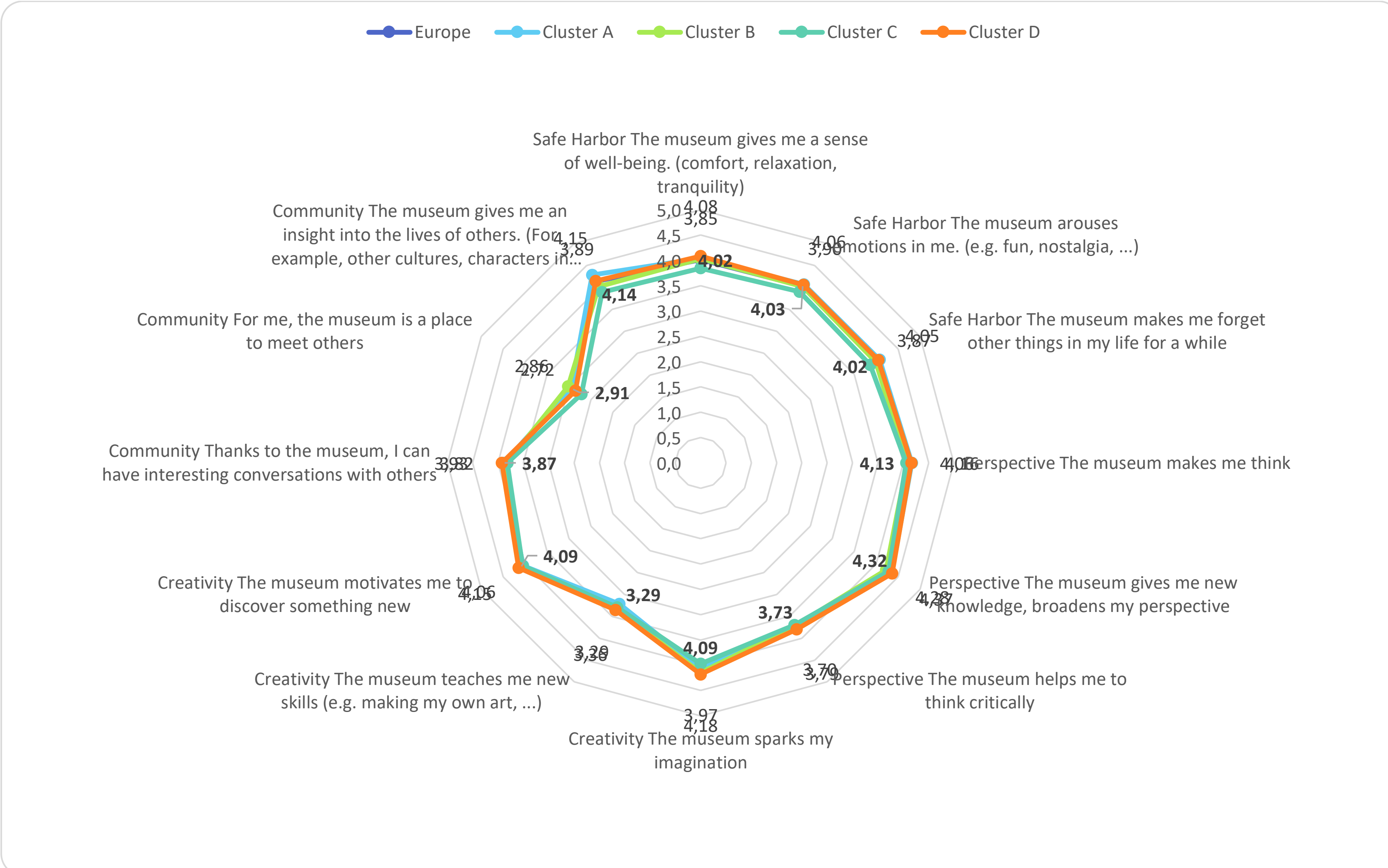
- Strongly Disagree: 1
- Disagree: 2
- Neutral: 3
- Agree: 4
- Strongly agree: 5

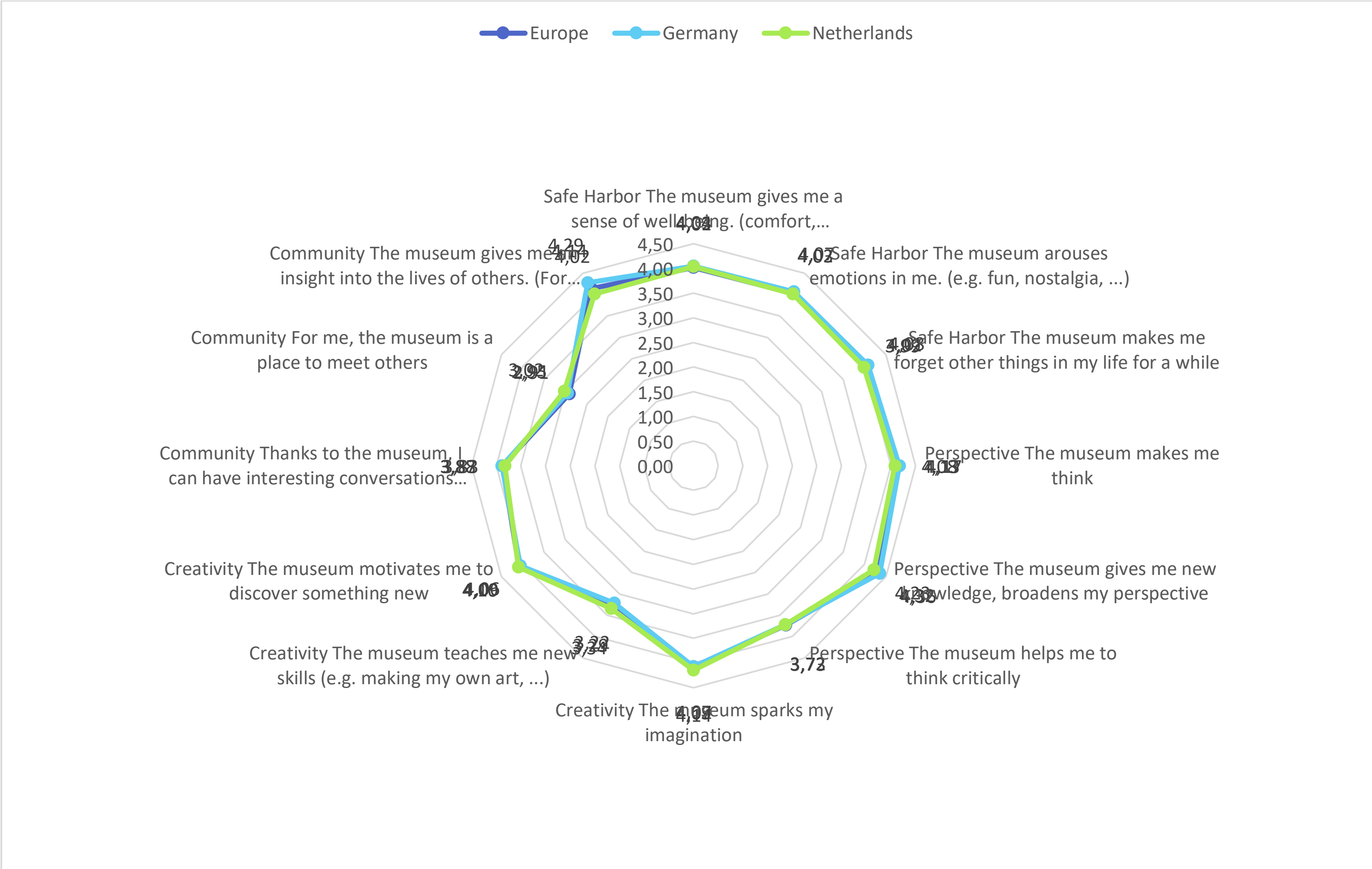
Based on these answers, a weighted average was calculated per statement. The answers were reweighted to neutralize respondents who indicated 'not relevant / I don't know'.

In general, we note that museums in Europe **have a very positive impact on the well-being** of their visitors. Overall, rational effects slightly dominate over emotional, social and creativity-promoting effects:

- They are seen as **a safe haven**. For the statements "the museum gives me a sense of well-being", "the museum arouses emotions in me" and "the museum makes me forget other things in my life for a while", we see scores above 4. This means that almost everyone answered 'agree' to 'strongly agree'.
- We see similar results with the 'perspective' dimension. The museum is thought-provoking (4.13) and helps to think critically (3.73). The statement that the museum offers new knowledge and broadens the view even scores 4.32.
- The museums also score very well on the 'creativity' dimension. 'The museum stimulates my imagination' and 'the museum motivates me to discover something new' both score 4.09. In the statement 'the museum teaches me new skills' we see a score that is closer to neutral (3.29), possibly an opportunity for the museums here.
- Finally, in the fourth dimension 'community', we also see strong scores for the statements 'thanks to the museum I can have interesting conversations with others' (3.87) and 'the museum gives me insight into the lives of others' (4.14). The museum is seen as rather neutral when it comes to the statement 'the museum is a place for me to meet others'. At first sight, this sounds logical due to the nature of the offerings of many museums, but it may also offer an opportunity for future developments.

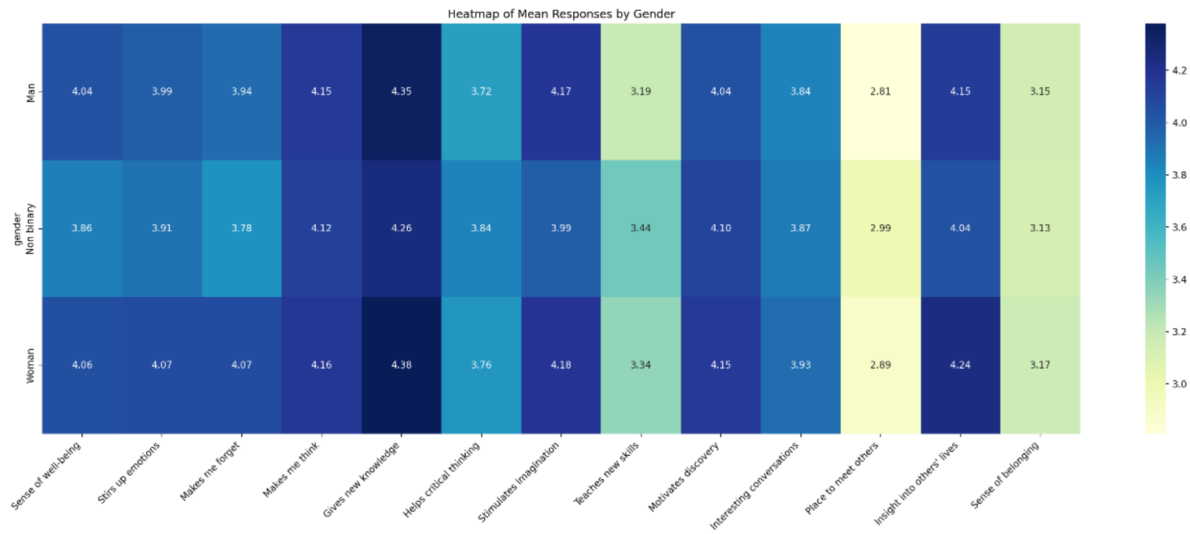
In the following graph you can read the European score as well as the thematic clusters. Below also an overview at country-level. At cluster level there are no significant differences while at country-level we see the German museums score slightly higher on the community level. On the other hand, we see a noteworthy difference is that the Dutch respondents seem *less often* than average to go to a museum in order to meet others (33% / 41%), while the other options in this question asking about social reasons to visit a museum (the museum allows to have interesting conversations; insight into the lives of others; sense of belonging) do *not* significantly differ from average.


Europe
Cluster A
Cluster B
Cluster C
Cluster D
Safe Harbor The museum gives me a sense of well-being. (comfort, relaxation, tranquility)
Safe Harbor The museum arouses emotions in me. (e.g. fun, nostalgia, ...)
Safe Harbor The museum makes me forget other things in my life for a while
Perspective The museum makes me think
Perspective The museum gives me new knowledge, broadens my perspective
Perspective The museum helps me to think critically
Creativity The museum sparks my imagination
Creativity The museum teaches me new skills (e.g. making my own art, ...)
Creativity The museum motivates me to discover something new
Community Thanks to the museum, I can have interesting conversations with others
Community For me, the museum is a place to meet others
Community The museum gives me an insight into the lives of others. (For example, other cultures, characters in...
5,0
4,5
4,0
3,5
3,0
2,5
2,0
1,5
1,0
0,5
0,0


Europe
Germany
Netherlands
Safe Harbor The museum gives me a sense of wellbeing. (comfort,...
Safe Harbor The museum arouses emotions in me. (e.g. fun, nostalgia, ...)
Safe Harbor The museum makes me forget other things in my life for a while
Perspective The museum makes me think
Perspective The museum gives me new knowledge, broadens my perspective
Perspective The museum helps me to think critically
Creativity The museum sparks my imagination
Creativity The museum teaches me new skills (e.g. making my own art, ...)
Creativity The museum motivates me to discover something new
Community Thanks to the museum, I can have interesting conversations...
Community For me, the museum is a place to meet others
Community The museum gives me new insight into the lives of others. (For...
4,50
4,00
3,50
3,00
2,50
2,00
1,50
1,00
0,50
0,00

BY GENDER

We also investigated potential relevant differences in the impact of the museum, looking at the different genders of the respondents.



We can observe that:

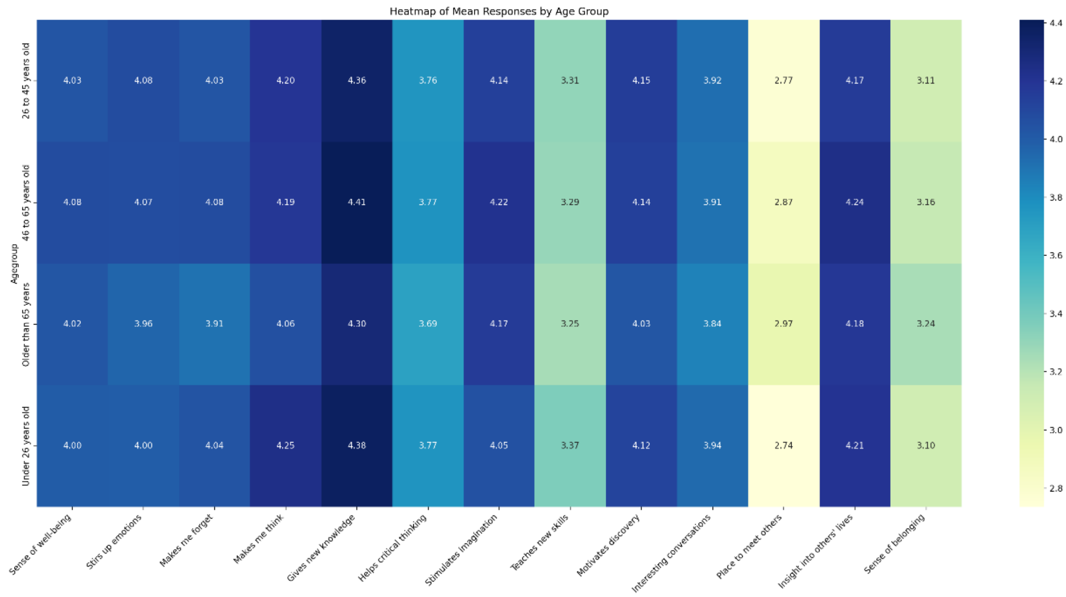
- Overall, the patterns of responses are similar across genders, with most questions receiving mean scores between 3 and 4.5.
- Women tend to have slightly higher mean responses for most questions compared to men and non-binary individuals.
- The question about the museum teaching new skills shows the largest variation among genders, with non-binary individuals giving the highest mean response.
- The question about the museum being a place to meet others consistently receives the lowest scores across all genders.
- All genders give the highest scores to the question about gaining new knowledge and broadening views, with mean scores above 4.3 for all groups.
- Women tend to give slightly higher scores on most questions, particularly for questions related to emotions and forgetting about other things in life.
- Non-binary individuals show some distinct patterns, such as giving higher scores for the museum teaching new skills and helping to think critically compared to other genders.
- The social aspects of museum visits (e.g., meeting others, sense of belonging) consistently receive lower scores across all genders, but still positive. This may be a potential point to further improve.

Based on the analysis of the survey responses, we can summarize the key findings regarding gender differences in museum impact:

1. Emotional Engagement: Women tend to have the strongest emotional connections with museums, while non-binary individuals report the lowest emotional engagement.
2. Immersion: Women are more likely to use museums as a form of mental escape, reporting the highest levels of forgetting about other things in their lives during visits.
3. Knowledge Acquisition: Women perceive museums as slightly more educational, reporting the highest levels of gaining new knowledge and broadening their views.
4. Critical Thinking: Non-binary individuals report the highest levels of critical thinking stimulation in museums, while men report the lowest.
5. Skill Acquisition: Non-binary individuals are more likely to engage with skill-building activities in museums, reporting the highest levels of learning new skills.
6. Discovery Motivation: Women show the highest motivation for discovering new things in museums, while men report the lowest levels.
7. Social Space Perception: Non-binary individuals are more likely to view museums as places to meet others, while men are least likely to perceive museums as social spaces.

These findings suggest that there are indeed some gender-based differences in how individuals experience and perceive museums. However, it's important to note that while these differences are statistically significant, the actual numerical differences between the highest and lowest scores are relatively small in most cases.

Looking at the differences between the age groups and the impact that the museum has on their wellbeing, we created following heatmap:



The results of the Impact model show statistically significant differences across age groups. The strongest differences are in "The museum makes me think" and "For me, the museum is a place to meet others". The smallest, yet still significant, difference is in "The museum teaches me new skills".

Key insights from the age group analysis:

- Overall Trends:
  - All age groups generally rate their museum experiences positively, with most scores above 3 on a 5-point scale.
  - The 46-65 age group tends to have the highest scores across most categories.
- Knowledge and Learning:
  - "Gives new knowledge" is consistently the highest-rated aspect across all age groups, with the 46-65 age group rating it the highest (4.41).
  - Younger visitors (Under 26) rate "Makes me think" higher (4.25) compared to other age groups, suggesting they find museums more intellectually stimulating.
- Emotional Connection:
  - The 26-45 and 46-65 age groups report slightly higher scores for "Stirs up emotions" (4.08 and 4.07 respectively) compared to other age groups.

- "Sense of well-being" is rated highest by the 46-65 age group (4.08), indicating they find museums more relaxing or comforting.

- Social Aspects:
  - "Place to meet others" is consistently the lowest-rated aspect across all age groups, with scores ranging from 2.74 to 2.97.
  - Interestingly, the 65+ age group rates this aspect the highest (2.97), suggesting older visitors may view museums more as social spaces.

- Skills and Discovery:
  - "Teaches new skills" is rated relatively low across all age groups, with scores ranging from 3.25 to 3.37.
  - "Motivates discovery" is rated consistently high across all age groups, with the 26-45 age group giving it the highest score (4.15).

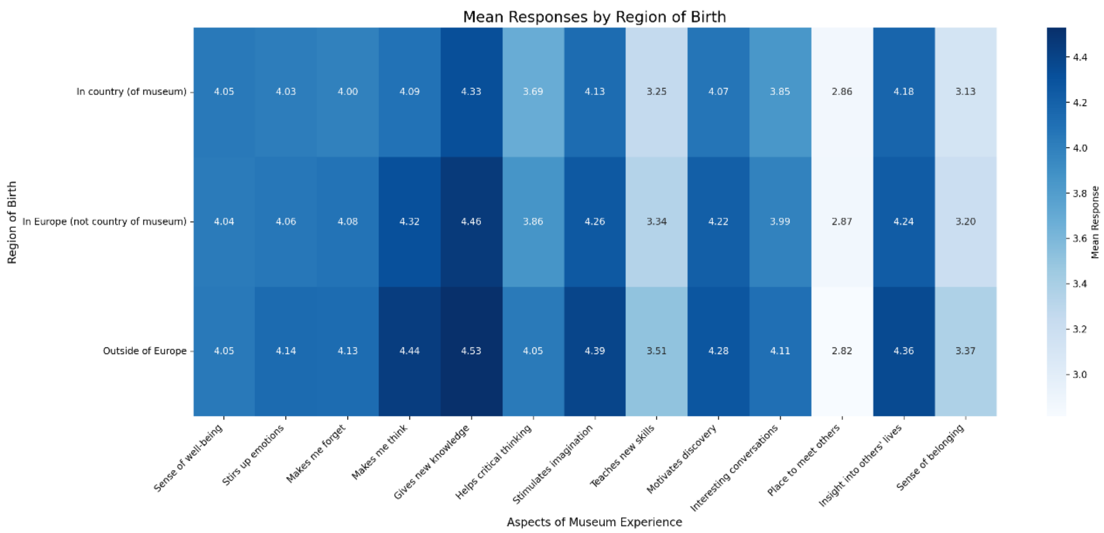
- Critical Thinking:
  - "Helps critical thinking" is rated lower compared to other cognitive aspects, with scores ranging from 3.69 to 3.77.

- Imagination and Insight:
  - "Stimulates imagination" is rated highest by the 46-65 age group (4.22) and lowest by the Under 26 group (4.05).
  - "Insight into others' lives" is rated consistently high across all age groups, with the 46-65 group giving it the highest score (4.22).

These insights suggest that while there are some differences in how age groups experience museums, the overall trends are relatively consistent. Museums appear to be successful in providing knowledge and discovery across all age groups, but there may be opportunities to enhance social aspects and skill-building experiences, particularly for younger visitors.

BY REGION OF BIRTH

We then analyzed the impact of the museum, depending on the region of birth of the respondents.



Key observations:

- The museum stirs up emotions in me:
    - Small positive effects for "Outside Europe" compared to both "In country" and "In Europe”.
    - This suggests that visitors from outside Europe tend to experience slightly stronger emotional responses to museums.
- The museum makes me forget about other things in my life:
    - Small positive effects for both "In Europe" and "Outside Europe" compared to "In country".
    - Visitors from Europe and especially outside Europe tend to experience slightly more immersion or escapism in museums.
- The museum makes me think:
    - Positive effect for "Outside Europe" compared to "In country".
    - Moderate positive effect for "In Europe" compared to "In country".
    - This indicates that visitors from outside the country, especially from outside Europe, tend to find museums more thought-provoking.
- The museum gives me insight into the lives of others:
    - Small positive effects for "Outside Europe" compared to both "In country" and "In Europe”.

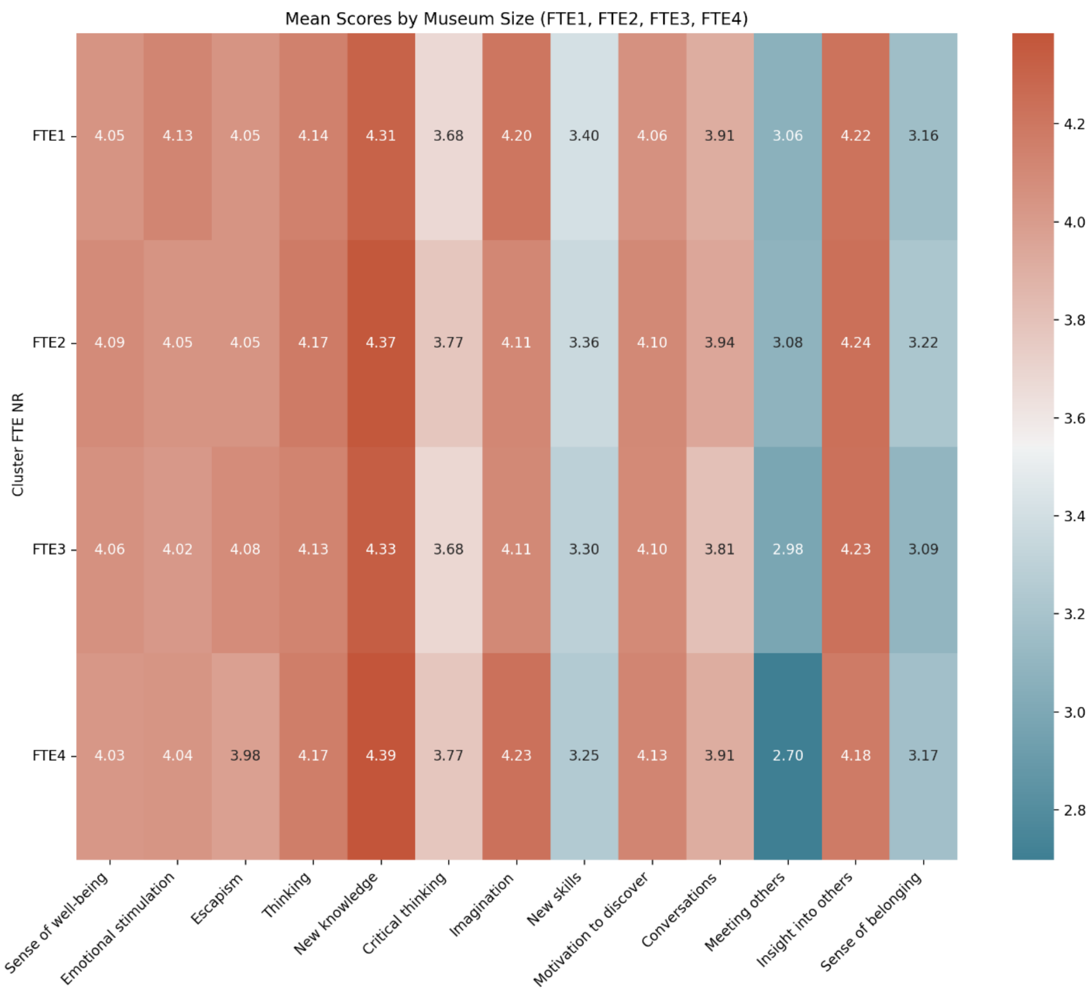
- This suggests that visitors from outside Europe gain slightly more insights into other lives and cultures from museum visits.

- The museum gives me a sense of belonging:
    - Small positive effects for "Outside Europe" compared to both "In country" and "In Europe".
    - This indicates that visitors from outside Europe tend to experience a slightly stronger sense of belonging or connection in museums.

Overall, the heatmap and analyses reveal that visitors from outside Europe, and (to a lesser extent) those from other European countries, tend to have even stronger positive impact from museums across various dimensions, particularly in cognitive engagement ("makes me think") and cultural insights. The effect sizes are generally small to moderate, with the largest effect observed for the "makes me think" subquestion when comparing visitors from outside Europe to those from the country of the museum.

These findings suggest that museums have a very strong positive impact on all museum visitors, and may have an even stronger impact on visitors born outside of the country of the museum and outside of Europe, possibly due to the novelty of experiences, cultural differences, or varying expectations. Respondents born outside of Europe generally rate the museum impact even higher across most categories.

Finally we look at potential differences for museum impact, looking at the size of the museum. Again, we use the FTE-cluster as categorization for “museum size” (see above). FTE1 are the smallest museums, FTE4 the largest.



Key observations:

Most scores across all museum sizes are high (between 3.5 and 4.5 out of 5), indicating generally very positive impact of museums, regardless of their size. There are some noticeable differences between museum sizes for certain aspects of the impact on the visitors. So museum size does influence the museums' impact, but the effect varies depending on the specific aspect of the impact.

- Smaller museums (FTE1 and FTE2) tend to excel in:
    - Providing emotional stimulation
    - Offering opportunities for skill acquisition
    - Facilitating social interaction
- Mid-sized museums (FTE2 and FTE3) often strike a balance between the strengths of smaller and larger museums.
- The most pronounced difference across museum sizes is in social interaction, suggesting that smaller museums may offer a more intimate, social environment.
- All museum sizes score a bit lower on creating a strong sense of belonging, indicating an area for potential improvement across the different museum sizes.
- The consistent high scores for providing new knowledge and motivating discovery suggest that museums of all sizes are successful in their educational mission.

The questionnaire focused on the 'museum of the future'. We asked visitors and past visitors what the museum of the future should offer them, first in an open field ('spontaneous' ideas), then via a 'helped' list of options.

The feedback that the respondents wrote down in the open field for the question "What should 'the museum of the future' offer you?" has been excluded from this report for analysis purposes.

On the next page of the survey, the list below was shown, with the question to indicate up to 3 things that belong to the museum of the future for the respondent. In addition, we see that the European museums in this top 5 consist of:

- Interactive experiences (43%)
- Immersive experiences (29%)
- Supporting young artists (26%)
- A more sustainable - eco-friendly museum (25%)
- A freely accessible meeting place (24%)

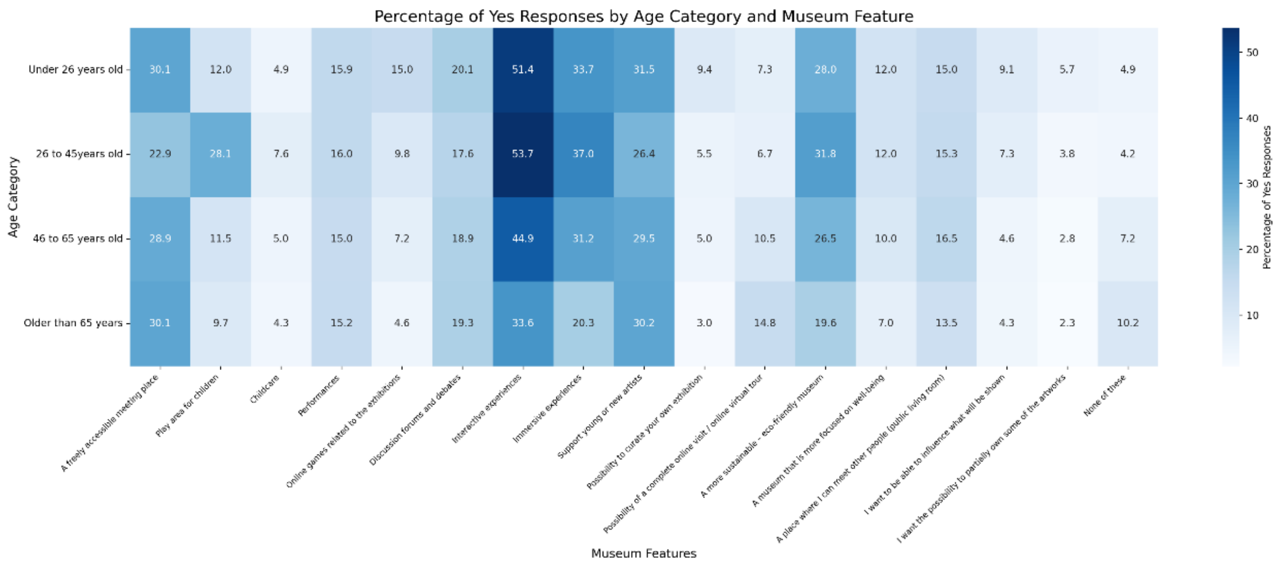
Again for Cluster C a “Children’s play area” is significantly more important, as these type of museums are frequented more often by families. The same is true for online games linked to the museum (13%) and interactive experiences (57%). For art museums on the other hand, a “A freely accessible meeting place” is selected more often (around 30%).

Museum of the future	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
A freely accessible meeting place	23,97%	20,08%	28,98%	20,45%	30,73%	20,23%	24,42%	23,87%	24,70%
Children's play area	15,97%	17,45%	12,03%	25,25%	7,78%	15,66%	15,92%	20,52%	9,86%
Childcare	4,94%	5,18%	6,01%	4,51%	3,98%	3,89%	5,27%	4,96%	4,79%
Performances	14,82%	12,64%	17,73%	16,36%	15,30%	13,83%	13,70%	17,27%	13,46%
Online games related to the exhibitions	8,03%	7,72%	5,75%	13,31%	5,70%	8,46%	9,20%	7,80%	6,48%

Discussion forums and debates	16,64%	15,64%	21,67%	14,76%	16,16%	15,43%	19,85%	16,32%	12,73%
Interactive Experiences	43,09%	43,39%	38,93%	57,03%	33,15%	48,23%	42,88%	42,55%	42,42%
Immersive (immersive) experiences	28,80%	28,96%	25,25%	34,41%	26,27%	34,86%	28,97%	25,98%	30,38%
Supporting young or new artists	25,62%	19,36%	39,35%	18,95%	32,67%	23,66%	27,09%	26,79%	22,48%
Possibility to curate your own exhibition	4,67%	3,59%	6,58%	4,04%	5,79%	4,69%	4,83%	5,26%	3,61%
Possibility for a fully online visit / online virtual tour	9,06%	9,10%	8,14%	6,96%	11,67%	9,71%	8,79%	8,58%	9,90%
A more sustainable - eco-friendly museum	24,85%	23,49%	27,01%	28,30%	22,56%	22,97%	26,18%	26,73%	20,91%
A museum that is more focused on well-being	9,08%	9,34%	8,97%	9,03%	8,73%	6,29%	8,97%	10,64%	8,06%
A place where I can meet other people (public living room)	13,86%	14,04%	17,06%	10,63%	13,83%	15,43%	17,11%	13,48%	9,05%
I want to be able to influence what is shown	5,22%	4,92%	6,27%	5,08%	5,06%	4,57%	5,25%	6,32%	3,87%

I want to have the opportunity to be a partial owner of some artworks	2,63%	2,45%	3,73%	2,12%	2,55%	3,09%	2,69%	2,67%	2,34%
None of these	6,18%	6,78%	5,75%	4,09%	7,26%	5,71%	6,15%	5,37%	7,48%
No opinion	7,35%	7,72%	6,12%	5,83%	9,03%	8,00%	5,97%	7,18%	9,40%
Total	10942	4572	1929	2127	2314	875	3869	3591	2607

We investigated potential different desires for “the museum of the future”, depending on the age of the respondents.



The tests for all subquestions reveal statistically significant differences across age groups for most subquestions (15 out of 17), but with varying effect sizes, with some subquestions showing small to medium effects.

The strongest Age-Related Differences are:

- "Play area for children" : this shows the largest effect, indicating substantial differences in preferences across age groups. As could be expected, the age group “26 to 45 years” scores this the highest.
- "Interactive experiences" and "Immersive experiences" : these also show notable differences across age groups. On both dimensions, the “26 to 45” group gives the highest scores, followed by the group under 26 years old.

Rather moderate Differences can be found for sustainability, online visits, and online games.

The least Age-Related Differences:

- "Support for young artists" and "A place to meet other people" show very small effect sizes, suggesting minimal age-related differences.
- "Performances" and "Discussion forums and debates" are not statistically significant, indicating similar preferences across all age groups.

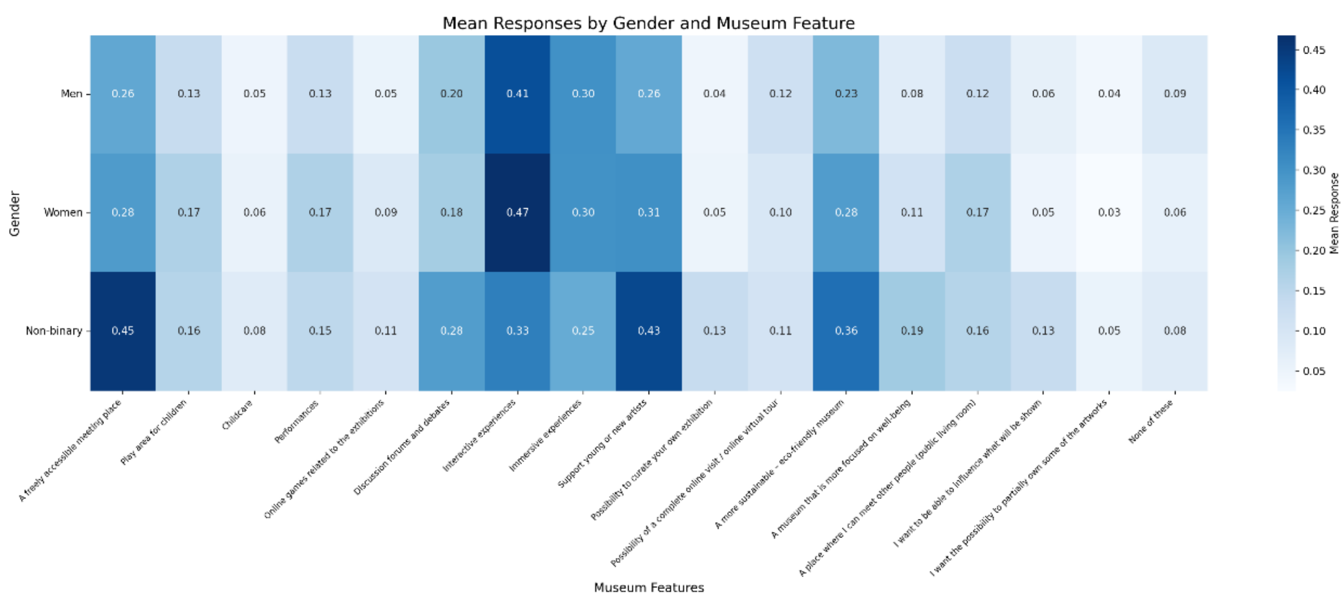
Consistent Interests:

- Features like "A freely accessible meeting place" and "A museum focused on well-being" show very small differences, indicating relatively consistent interest across age groups.

These findings suggest that while age does play a role in preferences for future museum experiences, the effects are generally modest for most features. The most pronounced age-related differences are in child-oriented features and interactive/immersive experiences.

BY GENDER

We analyzed the potential differences between the different genders and their preferences for the museum of the future.



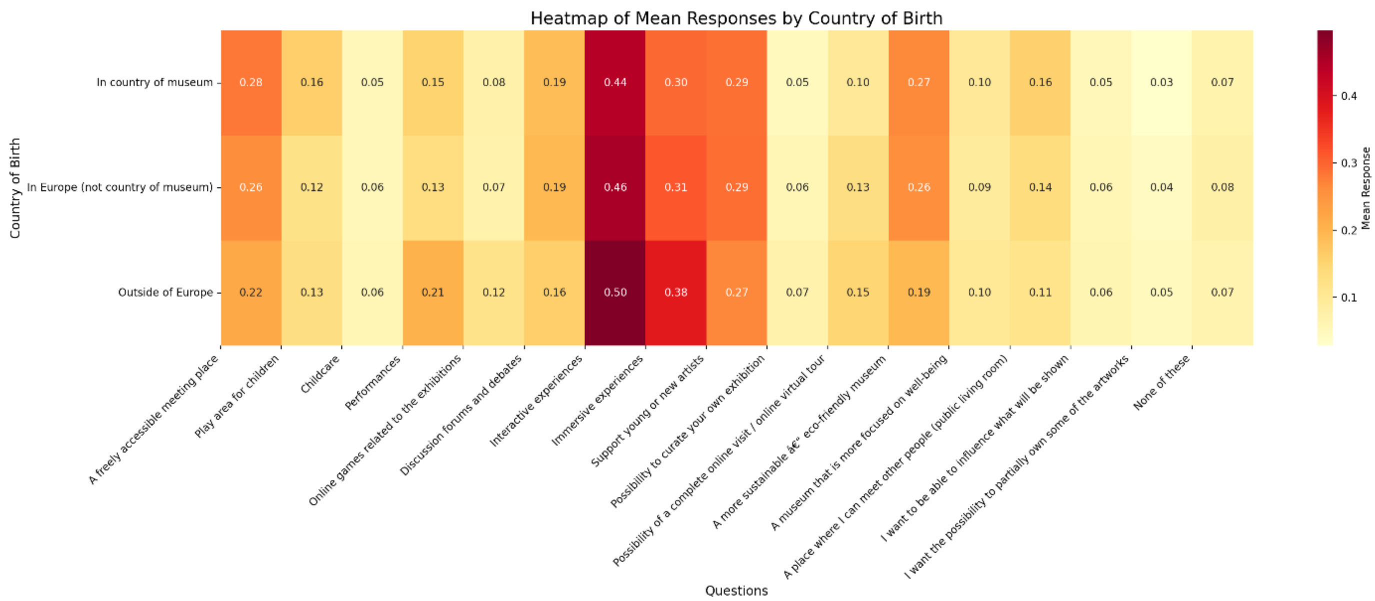
The tests indicate statistically significant differences for 15 out of 17 items, but suggesting small effect sizes. This suggests that while gender does play a role in preferences for the museum of the future, but the differences are not substantial for most features.

1. The largest differences are observed in preferences for:
    - A freely accessible meeting place (more important to non-binary)
    - Supporting young artists (more important to non-binary)
    - Interactive experiences (more important to women)
    - Sustainability (more important to non-binary)
    - Well-being focus (more important to non-binary)
2. There is very little gender-based difference in preferences for:
    - Online virtual tours
    - Childcare
    - Partial ownership of artworks

We note that the sample of non-binary persons in this analysis, is limited to 75, so conclusions about this gender should be taken cautiously.

Despite the statistical significances, the overall pattern suggests that gender is not a strong determinant of preferences for most future museum features. Other factors, such as age (as seen in the previous analysis) or individual interests, might play a more substantial role in shaping preferences for future museum experiences.

Finally, we investigate if there are relevant differences in preferences for the “museum of the future”, depending on the region of birth of the respondent.



Key findings:

The tests show statistically significant differences for 10 out of 17. The effects are generally small, suggesting that while there are some statistically significant differences in preferences based on region of birth, the practical implications of these differences are minimal. The region of birth appears to have a smaller influence on museum preferences compared to factors like age or gender, which we analyzed earlier.

These are the most significant differences in preferences based on region of birth:

- Possibility of a complete online visit / online virtual tour:
  - Those born outside the museum's country show slightly higher interest in online visits, possibly due to travel limitations or a desire to connect with the museum remotely.
- Play area for children:
  - Respondents born in the museum's country have a (slightly) higher preference for children's play areas, which may reflect local cultural attitudes towards family visits to museums.

5. PROFILE OF RESPONDENTS

Before diving into the further analysis and reporting of the complete questionnaires, a first analytical chapter provides a deeper insight into the profile of the respondents who participated in the study. We also compare some of our findings with the characteristics of the European and country-specific populations.

As already mentioned in the methodology section of this report, the composition of the respondent group may be a consequence of our method of data selection: as museum visitors, the respondents may be more actively involved in association life, more active cultural participants, better educated and of a more mature age.

It is important to realize that socio-demographic characteristics do not say everything about the museum visitor. As Falk (2006b, p.110) writes: “We think we know our visitors, but I would argue that we don't. As summarized above, we think we 'know' that museum visitors are better educated, older, from a specific location/country, more urban-modern, wealthier and more female than the public as a whole, but what does this actually mean? Although these statistics are on average true, museum visitors are not averages, they are individuals. Knowing that someone is better educated, older, from Denmark, more urban-modern, wealthier and more female than the public as a whole provides insufficient information to predict whether they will visit a museum or what they will do in the museum and remember from the experience. Equally, knowing that someone is less educated, younger, not from Denmark, more rural, traditional, poorer and more male than the visiting public as a whole provides insufficient information to predict that they will not visit a museum or that their visitor experience will be significant different from other visitors.” We must therefore be careful about drawing too hasty conclusions based on these data.

As indicated by the table below, at a European level, a relatively **higher proportion of respondents are in the age group of 45 years and older (60%).** The average age is 51 years with a standard deviation of 4.86. Based on statistics from the European Commission, the median age of the EU-28 population was 42.6 years on 1 January 2016. This means that generally museums attract a rather older population. For many museums, this is a reflection of the reality of their visitors. There are also no significant differences between the countries participating in this study as the average age of participants in Germany also lies at 51 and the Netherlands at 53.

There are however some minor significant differences between different types of museums. As the table below shows, the age range within museums for Modern Art, Contemporary Art, Applied Arts lies higher than in other types of museums. The same is also true for Ancient Arts museums. A similar conclusion could be drawn from the pilot study in Flanders in 2022. In this pilot study, we provided two clusters (based on the available set of participating museums): Arts museums and other types of museums. In terms of age distribution, we also noticed differences between the two types of museums. The art museums in this study had proportionally more people aged 60 and over among their recent visitors (44%) than museums with a focus other than art (36.15%). This was also a finding made by researchers from Ghent University in 2018 (De Baere, 2019). **The museums with a focus other than art were visited slightly more often by the age groups 30 to 44.** This is also visible in the table below, Cluster C has a higher group of visitors in this age group. This can be explained by the fact that museums on Physics, Technology, Science are often more regularly visited by families with children, of which the parents belong in this age category.

Age	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Average	51	49	54	47	55	51	49	52	51
Under 30	16,22%	19,50%	9,82%	19,38%	12,01%	16,53%	19,48%	11,66%	16,46%
30 to 44	23,91%	23,37%	21,81%	35,86%	16,80%	21,24%	23,36%	26,92%	22,64%
45 to 59	26,70%	26,91%	28,29%	21,27%	29,26%	27,75%	25,05%	26,04%	28,97%
60+	33,17%	30,20%	40,05%	23,41%	41,87%	34,43%	32,08%	35,36%	31,88%
Total	16669	7570	3196	2755	3148	1827	5749	4513	4580

In relation to the population, we see an audience that contains **more women** than the cross-section of the population. As mentioned above, this is a phenomenon that is often seen in public surveys and in this survey rings true for all participating countries. However, it also appears to be a broader observation that women are overrepresented among the museum public. When it comes to the different clusters of museums we see some non-significant differences. Smaller museums are generally more equally visited by men and women, where men seem more likely to visit art museums over other types of museums.

Gender	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Man	38,61%	39,03%	41,70%	35,82%	36,94%	50,95%	35,33%	35,16%	41,14%
Woman	60,10%	59,68%	56,93%	62,62%	62,07%	47,95%	63,22%	63,81%	57,43%
Non-binary	1,29%	1,29%	1,37%	1,56%	0,99%	1,10%	1,44%	1,04%	1,43%
Total	17231	7828	3295	2884	3224	1902	5952	4625	4752

In general, we see **a more educated audience** at museums: 80% of respondents in Europe were in higher education (university or otherwise). This is not a new image in the museum landscape and was also the case within the pilot study conducted in Flanders in 2022. 77% of respondents in Flanders and Brussels attended higher education. Specifically in the Netherlands this number seems to be even higher: almost 90% of respondents participating in this country indicated that they are in possession of a higher education degree. Compared to general European population data we see that on average, almost 28% of 15- to 75-year-olds in the 27 EU countries were highly educated in 2020 (Eurostat). In the Netherlands, the share of highly educated people was measured at 35% and thus higher than the EU average. However still, there seems to be a significant difference between the education level of the population of the country in general, and those visiting the museums of their location. In Germany, the share of highly educated people was the smallest according to Eurostat numbers in 2020, while the share of medium-educated people was the highest of the countries compared here.

Education	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	1,77%	2,95%	0,52%	1,64%	0,47%	1,02%	3,62%	0,78%	0,79%
Primary education	2,37%	3,44%	1,72%	2,17%	0,78%	2,88%	2,91%	2,09%	1,81%
Secondary education	12,14%	14,09%	10,79%	13,75%	7,89%	13,91%	13,48%	11,46%	10,54%

Higher education (non-university)	25,21%	23,04%	30,24%	25,50%	24,81%	30,20%	23,62%	26,40%	24,11%
University education	45,39%	43,88%	45,27%	44,00%	49,95%	41,18%	44,60%	48,28%	45,27%
Postgraduate education	9,29%	7,72%	7,50%	9,74%	14,28%	5,83%	7,00%	7,48%	14,89%
Remainder	3,83%	4,87%	3,96%	3,19%	1,83%	4,98%	4,77%	3,51%	2,60%
Total	16183	7265	3254	2443	3221	1768	5469	4250	4696

When asked about the current occupational situation, we see that among the European respondents, 26% are employed in the private sector, 24% are retired, and 24% are employed in the public sector.

Professional status	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Student / I'm taking a course	9,39%	10,21%	5,44%	14,28%	7,75%	6,48%	10,73%	8,06%	10,44%
Working in the private sector	26,29%	26,68%	26,10%	24,89%	26,87%	29,12%	22,53%	24,90%	30,92%
Working in the public sector	23,52%	23,88%	22,97%	25,93%	21,27%	22,58%	23,03%	24,57%	23,40%
Teacher	6,72%	6,38%	5,98%	8,90%	6,42%	7,05%	7,50%	5,60%	6,83%
Jobseeker	1,56%	1,52%	1,56%	1,91%	1,37%	1,42%	1,50%	1,58%	1,68%
Not active in the labour market	3,38%	3,14%	3,07%	3,59%	4,06%	3,53%	3,37%	3,66%	3,05%
Retired	23,96%	22,29%	28,60%	17,43%	28,06%	24,97%	24,17%	25,92%	21,25%
Working (or volunteering) in the cultural sector	5,66%	5,07%	8,14%	4,19%	5,46%	4,89%	7,13%	6,05%	3,86%
Remainder	6,81%	7,55%	7,01%	6,06%	5,67%	6,88%	8,00%	6,92%	5,27%
Total	14900	6268	3196	2507	2929	1758	4811	4233	4098

We created a separate category of "working or volunteering in the cultural sector", so that museums can evaluate whether their own employees or volunteers also shared their opinion. This is obviously not a problem, but important to keep in mind when evaluating the results.

To gauge the origin of the respondents, we asked three indirect questions to gain insight into this. On the one hand, we asked for the respondent's mother tongue, and on the other hand, they asked for their country of birth and the country of birth of their parents. These questions were not mandatory to answer.

As far as the European figures are concerned, it should be noted that proportionally more museums from Germany and Austria participated in the study than museums from other countries. Therefore, it makes little sense to share cluster results or European results on mother tongue.

When asked 'where were you born', a distinction was made between 'in the country of the museum', 'in Europe (not the country of the museum)' and 'outside Europe'. **The largest group of European respondents indicated that they were born in the country of the museum (81%).** Interesting and significant differences can be noted linked to the size of the museum. Larger museums attracted significantly more respondents from out of the country than small museums. This can be due to the fact that more tourists frequent these types of museums. Also between countries significant differences can be noted. 85,21% of the respondents of German museums live in the country of the museum they filled in the survey for. In the Netherlands this is only 59,53%.

Region birth	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
In the country of the museum	81,35%	83,44%	81,53%	78,57%	77,93%	91,88%	85,93%	87,42%	65,17%
In Europe (not country museum)	13,22%	11,57%	14,45%	16,51%	13,63%	6,29%	10,51%	9,02%	23,70%
Outside Europe	5,43%	4,99%	4,01%	4,92%	8,45%	1,83%	3,56%	3,56%	11,12%
Total	14444	7071	2491	2277	2605	1145	4968	4492	3839

The question on 'where were your parents born', is not included here as these numbers are mostly interesting on a museum-specific level to get insights into the % of migrants vs. tourists the museum attracts.

6. MUSEUM PROFILE

It is then interesting to see whether our respondents are actually museum visitors and how frequently they do so.

- "Visitors" have been in the museum for the past 12 months.
- Respondents who have been in the museum more than 12 months ago were defined as "past visitors". They were shown custom questions in the survey.
- Respondents who have not yet visited the museum were defined as "non-visitors" and were asked (a more limited number of) adapted questions.

Among the European museums, we see that about 62% of the respondents had visited the museum in the past 12 months and can thus be classified as “visitors”. In Germany and Austria a larger group of non-visitors were reached (around 25-30%).

It is this division that has also been decisive for the further branching of the survey. Since the survey was conducted at museum level, certain questions were only asked to recent visitors, former visitors and non-visitors. This was to always collect the most relevant information per respondent, tailored to the museums.

Visit to the museum	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
In the last 12 months	61,68%	59,78%	64,01%	58,58%	66,71%	57,51%	56,98%	70,29%	61,01%
Over 12 months ago	16,17%	17,86%	13,16%	16,70%	15,00%	14,94%	19,66%	15,50%	12,86%
No	22,15%	22,36%	22,83%	24,72%	18,29%	27,55%	23,36%	14,21%	26,12%
Total	21484	9542	4498	3665	3779	2396	7512	5715	5861

Visit to the museum	Europe	Germany	Netherlands	Austria	Belgium	Other countries
Yes, in the last 12 months	61,68%	54,72%	73,23%	51,35%	71,10%	57,81%
Yes, over 12 months ago	16,17%	18,60%	10,13%	18,42%	4,39%	19,74%
No	22,15%	26,68%	16,65%	30,24%	24,51%	22,44%

We asked the respondents who are visitors or former visitors whether their most recent visit to the museum in question was also their first visit. We notice that **many respondents in Europe have already visited the museum several times: 67.50%** indicate that their most recent visit was not their first visit. In the Netherlands this number is lower: 58,72%.

First visit to museum	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	32,50%	32,55%	33,88%	36,13%	27,61%	43,25%	28,75%	24,55%	42,17%
No	67,50%	67,45%	66,12%	63,87%	72,39%	56,75%	71,25%	75,45%	57,83%
Total	16682	7400	3439	2757	3086	1734	5722	4901	4325

We also asked all respondents how often they visit museums in general, not specifically the museum in their survey. Based on this data, we can distinguish between non-visitors, occasional visitors and frequent visitors. We define occasional visitors here as visitors who visit exhibitions or museums 3 times a year or less. Frequent visitors do this three or more times. We notice that among the European respondents, the largest group (54%) are regular museum visitors. Here we see again a difference between visitors of art-related museums and other museums. Visitors of art museums are more often frequent museum visitors. A similar conclusion could be drawn from the pilot study. Frequent museum visitors, we noticed in 2022, visit mostly museums of ancient art (64.7%) and museums of modern art (72.7%) and applied arts (34.4%). Similarly to our conclusions based on the frequency of visit to the specific museum in the questionnaire, we see again that in Germany a larger group of occasional visitors were reached (52,59%). The frequency of museum visits on the other hand is **higher in the Netherlands**: 63% visits museums more than three times a year, against a European average of 54%.

For comparison: In a survey of museum visitors throughout Germany, the German Institute for Museum Research found that only just under 10% are frequent visitors who go to a museum more than three times a year and the vast majority are infrequent/occasional visitors (including school classes, tourists, day trippers) (Institut für Museumsforschung 2023). The last Eurobarometer from 2013, which collected data on cultural use in a comparison of European countries, found that Sweden had the highest percentage of people who visited a museum at least once a year (76% of the population), the Netherlands had 60%, Germany 44% and the EU average was 37%.

Frequency museum visits	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Never	2,70%	4,32%	1,00%	2,32%	0,98%	3,76%	4,36%	1,24%	1,55%
Less than 1 time a year	10,16%	12,02%	7,04%	12,68%	6,74%	12,60%	12,50%	7,81%	8,46%
1 to 3 times a year	33,27%	36,10%	29,44%	37,96%	26,13%	37,40%	33,72%	32,13%	32,11%
More than 3 times a year	53,87%	47,56%	62,52%	47,04%	66,15%	46,24%	49,41%	58,82%	57,88%
Total	21500	9551	4501	3667	3781	2396	7517	5723	5864

If we then compare the two results, we see that respondents who completed the questionnaire for a museum they had recently visited are also significantly more frequent museum visitors. The reverse is also true. Non-visitors of one museum are therefore not necessarily non-visitors of museums in general. Statistically, it is true that they are also often non-visitors of museums in general.

How often do you visit a museum / Have you been to this museum?	Yes, within the past 12 months	Yes, more than 12 months ago	No	Total
Never	422 1,48%	56 0,85%	638 6,22%	1116 2,46%
Less than once a year	2051 7,20%	875 13,26%	1525 14,87%	4451 9,82%
1 to 3 times a year	8587 30,14%	2537 38,43%	3963 38,65%	15087 33,27%
More than 3 times a year	17431 61,18%	3133 47,46%	4127 40,25%	24691 54,45%
Total	28491	6601	10253	45345

If we analyse **the reason** for the last museum visit, 49% of the European respondents (logically) indicated that **they wanted to view the collection**. Curiosity, learning and being inspired were mentioned by 44% of respondents in Europe. 39% said they wanted to have a fun experience with the company they were in. However, we see strong differences between the clusters here. There are no significant links between museum size and reasons for the museum visit, but the type of museum has a strong correlation with the reason for visiting. Logically, aesthetic motivations are a lot less relevant in Cluster C, which are the museums focused on Physics, Technology, Science. Social motivations (27,52%) and curiosity (39, 46%) on the other hand are a lot less relevant for museums in Cluster D, compared to the other types of museums.

Reason for last visit	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
To recharge, find peace and time	16,14 %	18,75 %	12,61 %	11,56 %	17,71 %	10,50 %	13,93 %	23,73 %	12,91 %
Aesthetic experiences,architecture or environment	21,66 %	22,47 %	21,45 %	11,83 %	28,00 %	16,00 %	18,38 %	26,18 %	23,27 %
Curiosity, to learn and be inspired	44,06 %	42,95 %	46,25 %	49,80 %	39,46 %	45,67 %	42,85 %	44,93 %	44,13 %
For a good experience with those I was with	39,08 %	43,75 %	35,59 %	44,29 %	27,52 %	38,90 %	38,60 %	45,85 %	32,34 %

Specific professional or educational interest	11,85 %	12,01 %	10,88 %	13,93 %	10,86 %	9,58%	15,48 %	10,64 %	9,06%
Experience a specific event	13,07 %	11,55 %	13,82 %	10,06 %	18,38 %	17,12 %	12,84 %	13,88 %	10,97 %
I came along with someone else	2,61%	2,48%	2,59%	4,69%	1,24%	2,40%	3,42%	1,97%	2,28%
Visiting the city	12,31 %	13,26 %	9,99%	8,60%	15,76 %	8,39%	7,71%	6,75%	26,19 %
I wanted to visit the museum restaurant	2,96%	3,23%	3,61%	1,55%	2,70%	3,03%	2,76%	4,13%	1,91%
I wanted to visit the museum shop	5,24%	4,89%	8,52%	3,19%	3,93%	15,57 %	3,83%	5,00%	3,55%
To see the collection	49,09 %	44,29 %	51,80 %	45,38 %	60,65 %	55,46 %	46,02 %	45,29 %	55,08 %
Remainder	6,36%	6,34%	6,22%	7,46%	5,69%	7,19%	6,64%	6,03%	6,04%
Total	14504	6503	3133	2197	2671	1419	5148	4164	3773

There are also differences at a country-level. The table below shows the results fort he two countries with the most respondents, compared to the European average. In Germany the social dimension of the museum visit seems more relevant for the visitors of the participating museums (45,97%) while in the Netherlands seeing the collection (62,86%) and visiting the city (23,09%) are significaltly important more important than in the rest of the sample.

For future research it is intersting to compare these results to previous studies on visitor typology. According to Falk/Dierken (2011) for example, the following types were surveyed among visitors of Berlin museums according to their frequency: 1st “Explorer” (driven by curiosity with a decided interest in content; the proportion of Explorers is particularly high for art museums), 2nd “Facilitator” (predominantly socially motivated visitors who accompany others), 3rd “Professional/Hobbyist” (visitors who have a close connection and passion for the content of a particular type of museum). The “Experience Seekers”, (experience-oriented and entertainment oriented occasional visitors for whom it is important to have been there), and the “Re-Chargers”, who want to relax in the museum and seek contemplative moments, make up the smallest proportion.

Reason for last visit	Europe	Germany	Netherlands
To recharge, find peace and time	16,14%	16,29%	11,01%
Aesthetic experiences,architecture or environment	21,66%	21,12%	14,50%
Curiosity, to learn and be inspired	44,06%	42,80%	38,73%
For a good experience with those I was with	39,08%	45,97%	24,14%
Specific professional or educational interest	11,85%	10,99%	7,32%
Experience a specific event	13,07%	11,32%	14,74%
I came along with someone else	2,61%	2,45%	1,82%
Visiting the city	12,31%	12,65%	23,09%
I wanted to visit the museum restaurant	2,96%	3,99%	1,85%
I wanted to visit the museum shop	5,24%	9,17%	3,95%
To see the collection	49,09%	50,67%	62,86%
Remainder	6,36%	6,39%	6,47%

7. EVALUATION OF THE OFFER

An important part of the survey was spent evaluating what the European museums offer. We make a distinction between general satisfaction, the 'direct offer' and the 'supporting offer'. We also asked the respondents via an open question whether there are things missing from the offer for them. These answers are not included in this report.

EVALUATION OF 'DIRECT OFFER'

The 'direct offer' in the context of this report consists of the permanent collection, temporary exhibitions, activities or workshops, guided tours, audio tours, museum app, tours with QR code, Virtual or Augmented Reality applications, museum garden and library. Because every museum differs, the person in charge of each museum was asked in advance to indicate which offers from this list are available in the local museum. The research team then removed the non-existent offer from the answer options in the museum survey.

Among European museums, we see that 66% visited the permanent collection and 54% a temporary exhibition. A guided tour was indicated by 12% of the European respondents. In the larger museums the permanent collection is more often visited (71,52%). The same goes for Cluster C, the museums focused on Science (78,45%). Temporary collections on the other hand are -logically- more important for modern (66,68%) and classic art (70,37%) museums as well as for medium-sizes museums.

In accordance with our earlier findings on age groups related to the different museum categories, we can also see that activities for children are significantly more important for museums in Cluster C.

When it comes to guided tours, and digital applications, there are also significant differences between the different clusters. Visitors of large museums indicate fewer use of visits with a professional guide (5,64%), while they make more use of an audio tour (14,38%) or museum app (8,11%) / QR code tour (3,42%) than any of the other types of museums. This can be due to the fact that larger museums have invested more in these digital tools than was possible within the small and medium-sized museums.

Looking at country-specific data we see that, apart from visiting the (permanent and temporary) collections, Dutch respondents used the audio tour (17%) and museum app (13%) more often than the European average (7%, 4% resp.) while the European average uses the services of a professional guide more (12% vs. 4%). The availability of professional museum guides will likely vary among the countries, and Dutch museums on average seem to have reverted more to media interfaces such as audio tours and apps available, with which the Dutch visitors seem to be more satisfied than average.

Use of museum offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Permanent collection	66,10%	65,77%	48,17%	78,45%	74,05%	67,12%	63,42%	64,05%	71,52%

Temporary collection	53,63%	37,00%	66,68%	63,18%	70,37%	41,55%	60,19%	61,82%	40,33%
An activity or workshop	8,33%	7,53%	9,31%	11,95%	6,45%	13,27%	9,51%	8,11%	5,27%
An activity for children	9,11%	8,65%	7,35%	18,68%	4,62%	7,54%	10,82%	9,97%	6,48%
A visit with a professional guide	11,57%	15,13%	10,53%	6,23%	8,81%	14,78%	15,75%	10,87%	5,64%
An audio tour	7,18%	8,71%	6,17%	1,14%	9,28%	3,39%	3,91%	5,73%	14,38%
The Museum app	4,00%	2,21%	9,05%	0,41%	5,91%	3,09%	0,87%	4,34%	8,11%
QR code tour	1,36%	2,34%	0,00%	0,23%	1,32%	0,38%	0,56%	0,73%	3,42%
Virtual / Augmented reality applications in the museum	1,69%	0,72%	4,54%	3,05%	0,17%	1,06%	0,24%	1,84%	3,69%
Museum Garden	9,84%	14,75%	5,58%	4,18%	7,36%	6,86%	8,50%	18,44%	3,40%
Library	1,33%	0,55%	1,59%	0,64%	3,27%	0,53%	2,26%	0,76%	0,97%
None of these	5,81%	7,44%	7,35%	4,09%	2,19%	6,18%	4,41%	5,71%	7,67%
Total	14241	6371	2707	2200	2963	1326	5036	4083	3796

We then asked the visitors about their satisfaction with the offer they had taken advantage of. Respondents were only shown the options they had indicated in the question about the offer used. For example, only the offer used was evaluated.

If we exclude the respondents who indicated "no opinion", we see very positive results in Europe. **93% are 'satisfied' to 'very satisfied' with the permanent collection**, 91% with the temporary exhibitions and 94% with the activities or workshops for adults. The children's activities also score 94% satisfied to very satisfied visitors. 96% are satisfied or very satisfied with the visit with a guide, 88% with the audio tour and 81% with the museum app. This is very similar to the results in our pilot study, where 90% said to be 'satisfied' to 'very satisfied' with the permanent collection, 89% with the temporary collection. Again it is important to mention that these results are especially interesting at the level of the individual museums.

Satisfaction offer	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Permanent collection	9278	4129	1282	1707	2160	881	3143	2576	2678
Not satisfied at all	0,72%	0,70%	1,09%	0,82%	0,46%	0,45%	0,67%	0,62%	0,97%
Not satisfied	1,71%	1,84%	2,42%	1,23%	1,44%	1,02%	1,21%	1,79%	2,46%
Neutral	4,91%	5,38%	5,07%	4,39%	4,35%	4,77%	4,93%	5,47%	4,41%
Satisfied	29,84%	28,31%	32,29%	34,74%	27,45%	29,51%	30,10%	31,91%	27,67%
Very satisfied	62,38%	63,38%	58,50%	58,41%	65,93%	63,90%	62,77%	59,86%	63,85%
I didn't take advantage of this / no opinion	0,42%	0,39%	0,62%	0,41%	0,37%	0,34%	0,32%	0,35%	0,63%
Temporary collection	7630	2464	1772	1363	2031	696	2967	2470	1497
Not satisfied at all	1,15%	0,61%	1,07%	0,66%	2,22%	0,29%	0,67%	2,11%	0,94%
Not satisfied	2,23%	1,95%	2,43%	1,76%	2,71%	0,72%	1,35%	3,16%	3,14%
Neutral	5,90%	6,09%	7,00%	6,60%	4,23%	7,76%	6,13%	5,06%	5,95%
Satisfied	28,75%	27,72%	31,15%	32,87%	25,16%	25,57%	29,19%	28,58%	29,66%
Very satisfied	60,25%	60,02%	57,51%	57,30%	64,89%	55,03%	61,78%	60,24%	59,65%
I didn't take advantage of this / no opinion	1,72%	3,61%	0,85%	0,81%	0,79%	10,63%	0,88%	0,85%	0,67%
Activity or workshop	1143	465	242	256	180	172	458	321	192
Not satisfied at all	0,44%	0,43%	0,41%	0,78%	0,00%	0,00%	0,44%	0,31%	1,04%
Not satisfied	1,40%	0,86%	2,89%	0,78%	1,67%	0,58%	1,31%	1,25%	2,60%
Neutral	4,46%	4,95%	3,72%	3,91%	5,00%	5,23%	3,93%	3,74%	6,25%
Satisfied	27,47%	30,32%	31,40%	23,44%	20,56%	34,30%	24,89%	25,23%	31,25%
Very satisfied	64,57%	61,29%	60,33%	69,53%	71,67%	58,72%	68,34%	67,91%	55,21%
I didn't take advantage of this / no opinion	1,66%	2,15%	1,24%	1,56%	1,11%	1,16%	1,09%	1,56%	3,65%

Activity for children	1268	536	196	400	136	98	529	397	244
Not satisfied at all	0,63%	0,75%	2,04%	0,00%	0,00%	1,02%	0,00%	1,01%	1,23%
Not satisfied	1,10%	1,49%	1,53%	0,50%	0,74%	0,00%	0,95%	1,26%	1,64%
Neutral	4,34%	5,60%	3,57%	3,75%	2,21%	3,06%	3,97%	5,04%	4,51%
Satisfied	27,92%	29,10%	28,06%	26,50%	27,21%	26,53%	25,33%	29,22%	31,97%
Very satisfied	65,30%	62,50%	62,76%	68,75%	69,85%	66,33%	69,19%	62,97%	60,25%
I didn't take advantage of this / no opinion	0,71%	0,56%	2,04%	0,50%	0,00%	3,06%	0,57%	0,50%	0,41%
Visit with a professional guide	1613	951	274	134	254	195	777	435	206
Not satisfied at all	0,50%	0,42%	0,73%	0,75%	0,39%	0,00%	0,26%	0,46%	1,94%
Not satisfied	0,68%	0,74%	0,36%	0,00%	1,18%	0,51%	0,39%	0,92%	1,46%
Neutral	2,48%	3,26%	1,46%	0,75%	1,57%	1,54%	2,57%	2,99%	1,94%
Satisfied	16,37%	17,14%	16,42%	16,42%	13,39%	19,49%	14,67%	16,78%	18,93%
Very satisfied	79,60%	78,13%	81,02%	80,60%	83,07%	77,95%	81,85%	78,39%	75,24%
I didn't take advantage of this / no opinion	0,37%	0,32%	0,00%	1,49%	0,39%	0,51%	0,26%	0,46%	0,49%
Audio tour	998	541	164	22	271	44	192	229	533
Not satisfied at all	0,90%	0,37%	1,22%	4,55%	1,48%	0,00%	0,00%	1,31%	1,13%
Not satisfied	2,81%	2,03%	1,83%	0,00%	5,17%	2,27%	2,08%	2,18%	3,38%
Neutral	8,42%	8,69%	7,93%	9,09%	8,12%	15,91%	12,50%	7,42%	6,75%
Satisfied	33,67%	36,97%	32,32%	36,36%	27,68%	38,64%	33,33%	41,48%	30,02%
Very satisfied	53,11%	50,65%	56,10%	50,00%	56,46%	40,91%	50,52%	45,41%	58,35%
I didn't take advantage of this / no opinion	1,10%	1,29%	0,61%	0,00%	1,11%	2,27%	1,56%	2,18%	0,38%
Museum app	574	139	242	20	173	41	54	174	305

Not satisfied at all	0,70%	0,72%	0,83%	0,00%	0,58%	0,00%	0,00%	0,57%	0,98%
Not satisfied	5,23%	4,32%	6,61%	0,00%	4,62%	7,32%	3,70%	4,02%	5,90%
Neutral	12,54%	10,07%	15,29%	10,00%	10,98%	17,07%	9,26%	11,49%	13,11%
Satisfied	38,85%	39,57%	35,54%	30,00%	43,93%	31,71%	29,63%	47,70%	36,39%
Very satisfied	39,20%	42,45%	40,91%	15,00%	36,99%	39,02%	33,33%	35,06%	42,62%
I didn't take advantage of this / no opinion	3,48%	2,88%	0,83%	45,00%	2,89%	4,88%	24,07%	1,15%	0,98%
QR code tour	192	149	0	5	38	5	28	30	129
Not satisfied at all	3,13%	2,68%	N/A	0,00%	5,26%	0,00%	0,00%	0,00%	4,65%
Not satisfied	4,69%	4,70%	N/A	0,00%	5,26%	0,00%	3,57%	3,33%	5,43%
Neutral	12,50%	12,75%	N/A	0,00%	13,16%	0,00%	21,43%	16,67%	10,08%
Satisfied	31,77%	30,20%	N/A	20,00%	39,47%	20,00%	50,00%	23,33%	30,23%
Very satisfied	45,83%	47,65%	N/A	80,00%	34,21%	80,00%	17,86%	53,33%	48,84%
I didn't take advantage of this / no opinion	2,08%	2,01%	N/A	0,00%	263,00%	0,00%	7,14%	3,33%	0,78%
Virtual / Augmented reality applications in the museum	233	44	117	67	5	13	11	75	134
Not satisfied at all	1,72%	2,27%	1,71%	1,49%	0,00%	0,00%	0,00%	2,67%	1,49%
Not satisfied	3,43%	4,55%	4,27%	1,49%	0,00%	0,00%	0,00%	2,67%	4,48%
Neutral	9,44%	6,82%	11,11%	7,46%	20,00%	15,38%	0,00%	6,67%	11,19%
Satisfied	38,20%	34,09%	41,88%	34,33%	40,00%	30,77%	54,55%	36,00%	38,81%
Very satisfied	45,49%	45,45%	40,17%	55,22%	40,00%	53,85%	45,45%	49,33%	42,54%
I didn't take advantage of this / no opinion	1,72%	6,82%	0,85%	0,00%	0,00%	0,00%	0,00%	2,67%	1,49%

Museum Garden	1374	924	148	88	214	88	417	742	127
Not satisfied at all	0,36%	0,32%	0,68%	0,00%	0,47%	0,00%	0,48%	0,27%	0,79%
Not satisfied	1,02%	1,08%	0,68%	1,14%	0,93%	0,00%	0,72%	1,35%	0,79%
Neutral	5,97%	5,19%	7,43%	12,50%	5,61%	12,50%	5,52%	4,72%	10,24%
Satisfied	30,64%	27,60%	39,19%	35,23%	35,98%	44,32%	28,06%	29,65%	35,43%
Very satisfied	61,28%	65,04%	51,35%	50,00%	56,54%	43,18%	64,99%	63,07%	51,18%
I didn't take advantage of this / no opinion	0,73%	0,76%	0,68%	1,14%	0,47%	0,00%	0,24%	0,94%	1,57%
Library	183	31	42	13	97	7	111	28	37
Not satisfied at all	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
Not satisfied	0,55%	3,23%	0,00%	0,00%	0,00%	0,00%	0,90%	0,00%	0,00%
Neutral	6,01%	9,68%	7,14%	0,00%	5,15%	0,00%	5,41%	7,14%	8,11%
Satisfied	25,14%	29,03%	33,33%	15,38%	21,65%	14,29%	17,12%	46,43%	35,14%
Very satisfied	65,57%	51,61%	57,14%	84,62%	71,13%	85,71%	75,68%	35,71%	54,05%
I didn't take advantage of this / no opinion	2,73%	6,45%	2,38%	0,00%	2,06%	0,00%	0,90%	10,71%	2,70%

We asked a few additional questions about the museum's offer, in the form of a number of statements. We asked if the exhibit panels are easy to read, if the topics in the exhibit are fun, if it was easy to navigate the exhibit, and if the temperature in the museum was pleasant.

The European respondents also seem to be satisfied with these aspects.

- 86% agree or strongly agree with the statement that the exhibition panels are easy to read
- 89% of respondents in Europe like the topics of the exhibitions
- 84% find navigating the museum easy
- 83% find the temperature pleasant

We went deeper into the topic of the museum guide and the guided tours via 2 separate questions. At the museums that offer guided tours, we asked visitors whether they had made use of a guided tour. In Europe, 22% indicated that they did indeed use a guided tour. Again we see significantly lower amount of visitors using a guided tour in the larger museums, as we could also see in the questions above. Both in the Netherlands and Germany, the majority of the respondents didn't use a guide, hence why we don't dive deeper into these results here.

Use of guided tour	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	22,42%	25,93%	20,87%	12,95%	23,09%	21,18%	30,80%	20,29%	12,63%
No	77,58%	74,07%	79,13%	87,05%	76,91%	78,82%	69,20%	79,71%	87,37%
Total	12897	6097	2818	1938	2044	1374	4575	4105	2843

To the respondents who answered that they had taken a guided tour, we asked about their satisfaction with various aspects of the guide. If we exclude the respondents who indicated "not relevant" or "I don't know", we generally see very strong scores for the museum guides.

In Europe, 95% are satisfied or very satisfied with the knowledge of the guide. The interaction with the group scores high, but slightly lower than the other aspects: 87% are satisfied or very satisfied. 93% of respondents in Europe are satisfied or very satisfied with the enthusiasm of the guide, 95% with the clarity of the explanations and 96% with the friendliness of the guide. Finally, 95% are satisfied or very satisfied with the openness of the guide to questions.

8. MUSEUM SHOP

The museum shop was also evaluated in more detail at the museums with a museum shop. We first asked visitors if they had visited the museum shop. Across the European museums (with shop), it appears that **71% have visited the museum shop**. 38% said they had visited the shop, but had not bought anything. Finally, 32% have visited the shop and bought something. This **shows great potential** for the museum shops. In museums with shops, there still seems to be room to attract more museum visitors to the shop, and to get more shoppers to buy something. For museums without a shop, the figures below show that a museum shop could have a positive impact.

Visit shop	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes, and I bought something	32,41%	30,77%	38,99%	25,66%	34,44%	49,29%	29,15%	34,27%	28,14%
Yes, but I didn't buy anything	38,19%	36,14%	39,56%	40,21%	39,94%	34,19%	37,93%	40,45%	37,23%
No	29,40%	33,09%	21,45%	34,13%	25,61%	16,52%	32,92%	25,28%	34,63%
Total	11892	5376	2103	1594	2819	1126	4456	3659	2651

The group of respondents who visited the museum shop were then asked how satisfied they were with the range of products, the price level, the cleanliness and the friendliness of the staff. And here, too, we see a very high level of satisfaction among museum visitors in Europe. If we exclude the people who have indicated "not applicable" or "no opinion", we see the following percentages in Europe who are satisfied or very satisfied:

- Product range: 72%
- Price level of the products: 53%
- Cleanliness of the shop: 92%
- Friendliness of staff: 87%

It seems that, in line with the on-trade offer, the price level in particular could be discussed if we look at the European figures.

The respondents (from museums with a museum shop) who did not visit the museum shop were asked why this was the case. "I don't feel the need to buy anything" (49%) and "I didn't have enough time" (28%) were often indicated.

Reasons not to visit shop	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
There is no museum shop / I haven't seen the museum shop	14,78%	19,25%	15,59%	9,96%	6,92%	29,57%	21,60%	10,63%	5,53%
I didn't have enough time	27,86%	26,59%	28,51%	26,38%	31,92%	28,49%	25,27%	26,47%	33,06%
It was too busy	2,37%	1,67%	1,56%	3,32%	3,93%	4,30%	1,07%	2,60%	3,69%
The prices are too high	3,60%	3,08%	2,45%	5,90%	3,77%	2,69%	3,21%	3,28%	4,72%
I can't find the offer I want	2,68%	2,04%	3,12%	4,06%	2,83%	3,76%	2,98%	2,83%	1,84%
I don't feel the need to buy anything when I visit the museum	48,49%	47,19%	49,44%	48,89%	50,79%	35,48%	45,88%	52,15%	51,50%
The museum shop was closed	2,37%	3,15%	0,89%	2,40%	1,42%	0,54%	2,29%	3,62%	1,61%
The staff of the museum shop is not friendly	0,15%	0,19%	0,22%	0,18%	0,00%	0,00%	0,31%	0,11%	0,00%
Remainder	5,39%	4,50%	4,68%	7,56%	6,29%	5,91%	4,81%	5,77%	5,76%
Total	3248	1621	449	542	636	186	1310	884	868

9. MUSEUM VISIT

After evaluating the offer, we asked the respondents for some additional information about their museum visit. We asked them with whom they last visited the museum and how long their last visit lasted.

The largest group of museum visitors in Europe comes with their partner (35%), followed by 'friends or acquaintances' (21%) and family (19%). 'Alone' (18%) and 'with the children' (15%) were also often indicated. Divided by type of museum, we see that art museums are more often visited alone and with a partner or friends, and museums with a focus other than art are more often visited with children or family. Especially museums of Science are significantly more visited within the context of a school visit.

Company at last museum visit	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Alone	17,64%	15,49%	20,37%	12,33%	24,07%	14,44%	17,14%	19,09%	18,09%
Partner	35,35%	36,65%	35,38%	30,29%	36,15%	35,56%	30,47%	36,65%	40,60%
Friends or acquaintances	21,06%	19,99%	24,32%	18,62%	22,15%	22,80%	22,00%	21,50%	18,54%
Children	15,14%	13,50%	15,00%	28,19%	9,09%	13,63%	14,22%	17,27%	14,70%
Family	19,13%	22,45%	15,63%	20,97%	13,38%	18,16%	19,28%	20,68%	17,60%
Parent(s)	3,75%	3,97%	3,44%	4,36%	3,05%	3,02%	3,48%	4,25%	3,87%
An association	1,36%	1,38%	1,23%	1,26%	1,53%	1,62%	2,09%	0,91%	0,74%
School / training institute	5,07%	7,56%	1,77%	6,21%	1,66%	8,76%	7,75%	3,14%	1,92%
In the context of my work	3,43%	3,75%	2,97%	4,28%	2,50%	2,73%	5,45%	3,01%	1,40%
Remainder	2,04%	1,91%	1,93%	3,44%	1,36%	1,91%	2,69%	1,79%	1,45%
Total	15961	7332	3166	2384	3079	1724	5654	4521	4062

Looking at the country-specific data, some other differences can be detected. The largest group of museum visitors in Germany and Europe come with their partner (34% : 35%), followed by family (22% : 19%) and friends or acquaintances (21% each) or “with children” (13% : 15%). In contrast, comparatively few people go to the museum alone (17% : 18%), which shows that museum visits are **mostly social events**. In Germany also, more respondents indicated to have visited the museum within the context of a school visit (7, 59%), or socially with an association or for work, where as in the Netherlands the amount of visits together with a partner, lies higher than the European average. Significant differences are seen in the visits in school contexts as well in the Netherlands: NL 0,5% and average 5%. Given that this indicates young visitors, it is important to combine this with the fact that also the visits with parents (3.05% NL vs 3,75%) EU and family (16% vs 19%) are lower for the Dutch than average.

Company at last museum visit	Europe	Germany	Netherlands
Alone	17,64%	17,05%	19,32%
Partner	35,35%	33,54%	40,49%
Friends or acquaintances	21,06%	20,74%	18,23%
Children	15,14%	13,24%	15,04%
Family	19,13%	21,69%	16,09%
Parent(s)	3,75%	4,39%	3,05%
An association	1,36%	1,18%	0,40%
School / training institute	5,07%	7,59%	0,51%
In the context of my work	3,43%	3,25%	0,81%
Remainder	2,04%	1,87%	1,97%

The company with whom people visit the museum is also very strongly age- and gender-related. It is striking that 43% of men visit the museum with their partner, while only 33% of women visit the museum with their partner. Men also visit the museum slightly more often alone. Women visit more often with friends (22.68%) and/or with children (15,77%) than men.

Company at last museum visit	Europe	Men	Women
Alone	17,64%	22,35%	17,82%
Partner	35,35%	43,16%	32,80%
Friends or acquaintances	21,06%	15,55%	22,68%
Children	15,14%	12,26%	15,77%
Family	19,13%	15,64%	18,73%
Parent(s)	3,75%	2,65%	3,90%
An association	1,36%	0,95%	0,88%
School / training institute	5,07%	2,77%	3,61%
In the context of my work	3,43%	1,63%	2,43%
Remainder	2,04%	1,65%	2,04%

As far as the length of the museum visit is concerned, we see that the largest group of museum visitors in Europe stays in the museum for 1 to 2 hours (43%). 31% stay in the museum for 2 to 3 hours, 14% more than 3 hours. Again we can see important differences between the highest participating countries in this study. **More people spend a longer time in the museum per visit in the Netherlands than the European average**: 38% for 2-3 hours and 20% more than 3 hours, against 31% and 14% respectively.

Length of last museum visit	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Less than half an hour	1,08%	1,20%	0,94%	0,78%	1,20%	0,81%	1,14%	0,53%	1,71%
Half an hour to 1 hour	10,74%	11,26%	11,20%	8,71%	10,79%	9,92%	12,81%	6,68%	12,84%
1 hour to 2 hours	42,88%	38,84%	46,94%	45,35%	45,80%	39,70%	48,73%	40,60%	38,92%
2 hours to 3 hours	31,07%	31,14%	29,82%	30,95%	32,39%	30,58%	26,36%	36,61%	31,38%
More than 3 hours	14,23%	17,56%	11,11%	14,21%	9,82%	18,98%	10,96%	15,58%	15,14%
Total	16445	7276	3394	2688	3087	1733	5691	4761	4260

We also correlated this question with the previous question about how often people visit the museum for which they filled out the questionnaire. Partly against expectations, we see no significant differences between respondents who indicated that they only visit the museum once and those who visit more often. It therefore appears that people who visit the museum often do not also plan shorter visits.

10. PRICING

We asked the respondents how they experienced the price they paid for admission or to visit the museum's activities. We asked about a general price perception. 24% of European respondents said they didn't have to pay or didn't have an opinion on pricing. If we don’t take this group into account, and therefore only take into account the group of respondents who paid or had an opinion, we see that 76% of the European respondents think **the museum is correctly priced**. 14% think the museum is expensive to very expensive, 18% think the museum is cheap to very cheap. No significant differences can be seen between the clusters. We see no significant differences here based on age, gender or education level. However between countries there are important differences, with 37,1% of the Dutch respondents indicating that they did not have to pay for their visit, which is significantly higher than the European average.

Price perception of access or activities	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Very cheap	5,26%	6,06%	5,28%	4,37%	4,11%	4,52%	7,81%	4,60%	3,09%
Cheap	8,65%	9,43%	9,36%	8,97%	6,13%	10,81%	10,95%	7,81%	5,90%
Correctly priced	51,51%	55,17%	50,75%	52,39%	44,12%	59,36%	50,23%	52,13%	49,45%
Expensive	9,65%	9,57%	9,36%	9,09%	10,45%	8,88%	7,67%	9,86%	12,15%
Very expensive	1,23%	0,94%	1,38%	1,32%	162,00%	1,11%	0,94%	1,12%	1,74%
I didn't have to pay / No opinion	23,70%	18,83%	23,86%	23,86%	33,56%	15,32%	22,40%	24,49%	27,66%
Total	13015	5757	2745	1739	2774	1351	4366	3741	3557

Almost all participating museums offer different subscription formulas and discounts. These are very different locally. In general, we asked whether the visitor (or former visitor) had made use of a discount or subscription formula. In Europe, we see that **1 in 3 respondents made use of a discount or subscription formula**. This group is therefore a very important part of the visitors. In the Netherlands, the Museum Card has a very strong presence. For the Dutch museums, we have therefore shown the Museum Card separately as an answer option. 7% of the respondents from the Dutch museums indicated that they had used the Dutch Museum Card ("Museumpas").

Use subscription plans or discounts	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	25,44%	27,57%	23,29%	30,25%	18,54%	14,84%	24,05%	39,12%	12,89%
No	67,46%	71,47%	63,57%	64,18%	65,22%	81,31%	71,08%	56,31%	69,65%
Yes, the Museum Card	7,09%	0,97%	13,15%	5,57%	16,25%	3,85%	4,87%	4,57%	17,46%
Total	7456	3312	1666	1167	1311	883	2832	2298	1443

11. CHILDREN

For many museums, the offer for children is very important. We asked respondents if they had children and what age category their children are in. We then asked if their children had participated in any of the museum's children's activities and what impact these activities had on the children. 63% of respondents in Europe said they had children. We made a distinction between children living with them and children who are not living with them. Again we see that respondents for museums in Cluster C indicate they have more living-in children. This correlates to our earlier findings that the visitors of these types of museums are often in younger age categories and visiting this type of museum together with children.

Children	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes, live-in	27,02%	26,88%	23,14%	41,64%	15,87%	23,72%	27,31%	30,69%	21,74%
Yes, partly resident	6,18%	6,96%	6,36%	4,62%	6,02%	6,72%	5,96%	6,50%	5,72%
Yes, non-resident	30,23%	30,51%	32,68%	22,33%	35,41%	36,79%	27,89%	29,95%	31,52%
No	36,57%	35,65%	37,82%	31,41%	42,69%	32,77%	38,84%	32,86%	41,03%
Total	9919	3877	2200	2015	1827	1071	3607	3369	1872

We asked about the age range of the children and found that 63% of European respondents said they had children over the age of 18. Again for the respondents for cluster C, the age range of the children is significantly younger than for other types of museums.

Children's age categories	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
I don't have children	0,12%	0,26%	0,07%	0,00%	0,00%	0,13%	0,23%	0,04%	0,09%
Younger than 3 years old	6,52%	6,85%	4,46%	9,88%	3,35%	4,97%	6,72%	8,15%	3,17%
3 to 5 years	11,20%	9,96%	8,52%	20,32%	4,59%	8,93%	10,29%	14,44%	7,07%
6 to 12 years	23,78%	20,80%	18,84%	41,26%	12,52%	21,94%	23,74%	26,07%	19,58%
13 to 18 years	14,67%	14,54%	14,58%	14,89%	14,82%	15,82%	14,51%	12,81%	18,77%
Older than 18 years	63,34%	66,30%	69,57%	42,43%	78,11%	69,39%	63,46%	58,93%	69,54%
Total	7220	3053	1502	1619	1046	784	2633	2700	1103

We then asked parents if their children participated in children's activities at the museum. This question was only asked at museums that offer children's activities. Again the science museums in Cluster C attract more families and children participating in their activities.

Children's participation in activities	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	32,07%	28,97%	24,49%	55,00%	19,91%	24,55%	32,34%	39,29%	22,29%
No	67,93%	71,03%	75,51%	45,00%	80,09%	75,45%	67,66%	60,71%	77,71%
Total	6393	2503	1376	1389	1125	725	2220	2268	1180

To all parents (or grandparents) who answered "yes" to this question, we asked about the impact this children's activity(s) had on their children (or grandchildren). The impact was measured on different dimensions via 4 statements.

If we exclude people who answered "not relevant / no opinion", we notice the following results among the European respondents:

- The activity(ies) led to conversations: 83% agree or strongly agree
- The child felt happy with the activity(ies): 89% agree or strongly agree
- The child has learned something: 90% agree or strongly agree
- The museum is good for children's social contacts: 58% agree or strongly agree

So, the children's activities seem to have a very positive impact on the children. Only the statement that the museum is good for the child's social contacts seems to be less agreed with by the respondents. This may be a potential opportunity for the museums and the children's offer.

Again important differences can be noted at a country-level. Dutch children that do visit museums, participate in childrens’ activities more often than average (45% vs 32%) while the impact of these activities is the same as average.

12. EMPLOYEES

Earlier in the survey, extensive feedback was requested about the museum's guides. But we also asked some questions about the other employees (with the exception of the guides). We gauged satisfaction with the friendliness, accessibility, presence, helpfulness and expertise.

Once again, we note that the museums, and therefore the employees, score very well with the European respondents on these different dimensions. The line of high satisfaction is also continued here.

If we exclude the respondents who indicated "not relevant / I don't know", we see that the following percentages of the European respondents are "satisfied" to "very satisfied":

- Friendliness (They are friendly): 93%
- Accessibility (I can easily address them): 91%
- Attendance (They are approachable): 89%
- Helpfulness (They offer to help me): 88%
- Expertise (They can help me a lot, they are well trained): 82%

The many museum employees in Europe therefore score very well on the various dimensions.

13. ACCESSIBILITY

An important and sometimes sensitive theme is the accessibility of the museum. We chose to only ask questions about accessibility to respondents for whom this theme is of direct interest. That's why we first asked if there was anyone with a disability in the group on their last visit to the museum. This question was not mandatory. In the case of European museums, we see that, logically, the largest group answered 'no'. (91%)

Presence of someone with a disability	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	9,40%	10,30%	10,43%	6,78%	8,56%	12,12%	9,36%	9,85%	7,95%
No	90,60%	89,70%	89,57%	93,22%	91,44%	87,88%	90,64%	90,15%	92,05%
Total	13630	5901	2723	2214	2792	1386	4318	4151	3775

The respondents who indicated 'yes' were asked how accessible they think the museum is. If we exclude the group that wrote 'no opinion' (16%), we see that 58% find the museum very or very accessible and 18% answer neutrally. In general, we notice big differences between some museums. It is therefore important to analyse these results for each location and compare them with the clusters and the overarching results.

Accessibility of the museum	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Not accessible at all	6,09%	9,01%	1,78%	2,04%	0,31%	1,20%	0,90%	1,49%	12,44%
Not easily accessible	13,68%	13,72%	13,52%	14,97%	13,08%	9,58%	11,31%	24,57%	10,96%
Neutral	15,38%	15,31%	12,10%	19,05%	16,82%	22,75%	16,16%	18,61%	11,99%
Easily accessible	32,30%	29,03%	41,64%	39,46%	33,64%	36,53%	36,98%	36,72%	26,48%
Very easily accessible	16,72%	13,56%	25,62%	20,41%	19,63%	24,55%	22,26%	14,39%	12,79%
No opinion	15,83%	19,38%	5,34%	4,08%	16,51%	5,39%	12,39%	4,22%	25,34%
Total	2003	1254	281	147	321	167	557	403	876

14. MOBILITY

We asked the respondents who are visitors (or former visitors) how they came to the museum on their last visit to that museum. In the European results, we notice that **the private car** is used most often (44%), followed by public transport (28%) and 'on foot' (23%). Here, too, locally relevant differences are noted. In the Netherlands for example only 29% indicates to have visited the museum by car, while 44% used public transport. Of course, the location of the museum influences these results, therefore the cluster results below are of lesser importance compared to the location of the museum.

Mobility: transport to the museum	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
With my own car	43,51%	47,05%	43,48%	49,15%	26,09%	55,88%	44,54%	54,63%	26,31%
Carpooling (riding together)	5,17%	6,33%	5,11%	4,13%	3,08%	6,69%	6,16%	5,76%	2,71%
Shared car services	0,34%	0,36%	0,38%	0,22%	0,37%	0,29%	0,34%	0,18%	0,50%
By bike / electric bike	10,34%	8,35%	14,36%	10,38%	10,57%	12,13%	8,94%	10,31%	11,45%
By motorbike	0,29%	0,34%	0,41%	0,13%	0,16%	0,81%	0,25%	0,30%	0,12%
On foot	22,88%	20,51%	19,24%	20,02%	38,58%	16,40%	24,88%	15,50%	30,16%
By public transport	27,95%	27,32%	28,03%	26,23%	31,83%	14,19%	26,37%	22,82%	40,52%
Taxi or taxi services like Uber	0,26%	0,38%	0,15%	0,13%	0,21%	0,22%	0,14%	0,27%	0,41%
Airplane	0,42%	0,54%	0,23%	0,09%	0,74%	0,22%	0,30%	0,15%	0,91%
Remainder	1,37%	1,41%	1,50%	0,96%	1,59%	2,06%	1,22%	1,23%	1,44%
Total	12442	5596	2661	2303	1882	1360	4349	3335	3398

We then asked if it was easy to reach the museum. We see that in Europe, the vast majority of respondents were able to reach the museum easily (96%).

Reached the museum smoothly	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	96,40%	96,54%	96,32%	95,96%	96,68%	96,62%	96,50%	96,04%	96,64%
No	3,60%	3,46%	3,68%	4,04%	3,32%	3,38%	3,50%	3,96%	3,36%
Total	11351	4306	2693	2301	2051	1273	4339	3535	2204

15. COMMUNICATION & TICKETS

We included some questions about communication and ordering tickets in the study. We asked the respondents who are visitors or former visitors how they informed themselves about the museum.

Among the overall results in Europe, we see that **the museum's website** is the most frequently indicated (55%). 18% indicated that they knew about the museum through friends or acquaintances, 16% through social media. An important group (38%) also indicated that they were familiar with the museum from previous visits. This is mainly important for the medium sized-museums, where earlier we also noticed, temporary exhibitions are more often frequented.

Communication channels used	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
The museum's website	55,04%	54,44%	60,88%	53,09%	52,03%	57,66%	46,74%	61,36%	58,53%
Via social media	15,77%	15,74%	18,11%	14,54%	14,37%	17,94%	14,88%	18,24%	13,25%
The museum's newsletter (e-mail)	14,53%	11,25%	18,81%	13,76%	18,87%	15,61%	15,14%	19,62%	7,25%
A brochure of the museum	10,29%	12,15%	9,73%	8,30%	7,79%	11,91%	11,48%	12,44%	5,39%
Communication from the city or municipality of the museum	6,47%	6,07%	4,27%	6,34%	9,84%	5,30%	8,18%	5,45%	5,67%
Through friends or acquaintances	18,12%	17,40%	18,42%	18,66%	19,19%	18,45%	20,38%	17,19%	15,81%
Via posters or banners	7,57%	6,41%	7,91%	8,66%	9,27%	3,56%	8,39%	10,10%	5,12%
Via television or radio	2,90%	2,80%	3,76%	1,34%	3,49%	1,67%	2,14%	2,95%	4,48%

Through newspapers or magazines	9,23%	8,32%	11,83%	5,98%	11,36%	9,37%	9,98%	10,36%	6,79%
I've been there before	38,25%	40,82%	35,05%	38,71%	34,81%	35,37%	42,64%	42,55%	28,12%
Through online advertising	1,59%	1,45%	1,94%	1,65%	1,53%	2,03%	1,44%	1,30%	1,95%
Via a travel guide	3,29%	4,19%	1,67%	1,65%	4,01%	2,32%	1,99%	1,30%	7,89%
Through reviews (e.g. TripAdvisor, Google)	2,06%	2,24%	0,97%	1,80%	2,93%	1,38%	1,25%	1,70%	3,93%
I'm not informed / I happened to pass by this museum	2,39%	2,67%	2,17%	3,04%	1,41%	2,61%	2,85%	1,46%	2,71%
Remainder	5,30%	5,59%	4,73%	5,10%	5,34%	6,54%	6,07%	3,94%	5,27%
Total	13222	6212	2579	1940	2491	1377	4730	3833	3282

Because social media seems to be gaining in importance in society, we evaluated in more detail which social media would be chosen to keep up to date with the museum. 55% of respondents in Europe prefer not to be kept informed about the museum via social media. Among the other respondents, Instagram and Facebook are the most popular.

Preferred social media channels	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Facebook	21,92%	23,17%	19,17%	24,74%	19,32%	22,75%	22,12%	26,79%	16,48%
Instagram	27,46%	28,14%	27,32%	27,97%	25,58%	26,48%	29,15%	31,32%	21,84%
X (Twitter)	1,93%	1,84%	1,49%	1,95%	2,50%	1,34%	1,94%	2,06%	2,03%
TikTok	1,98%	2,43%	1,54%	1,89%	1,39%	1,13%	2,43%	2,06%	1,69%
LinkedIn	2,95%	1,92%	4,23%	3,18%	4,09%	2,25%	3,43%	2,68%	2,89%
Snapchat	0,39%	0,47%	0,47%	0,50%	0,04%	0,28%	0,51%	0,41%	0,25%
Youtube	8,97%	10,04%	10,61%	7,74%	5,89%	15,70%	8,53%	7,83%	7,73%
None of these	54,67%	53,94%	54,86%	52,92%	57,47%	51,90%	53,63%	48,81%	63,01%
Total	12154	5767	2149	1795	2443	1420	4281	3206	3247

Finally, we asked how visitors prefer to buy tickets for a museum. The **front desk** is the most important channel in Europe (69%), followed by 'online via the museum's website' (48%). Perhaps in line with the slightly higher preference of the respondents in the Dutch musea for online services, there is also a substantial preference for buying tickets online in this country. We see the same thing for the larger museums with over 70% of respondents for these museums indicating to prefer online ticket buying (many of the larger museums are of course also Dutch museums). The answers of the respondents who indicated a different channel via the 'other' option can be found in the individual reports of the museums and have been excluded from this report for analysis purposes.

Preferred channels to buy tickets	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Online via the museum's website	47,90%	46,38%	46,50%	42,02%	57,70%	44,19%	36,49%	42,83%	71,07%
Online via another website	3,50%	3,60%	3,68%	3,31%	3,22%	3,26%	2,96%	3,15%	4,76%
By e-mail	3,01%	3,10%	3,64%	2,73%	2,35%	4,15%	3,13%	2,78%	2,60%
In the building at the front desk	69,39%	72,56%	69,40%	74,58%	58,04%	74,46%	79,89%	74,64%	46,62%
In the building at a ticket machine	10,63%	12,15%	8,42%	14,55%	6,39%	11,25%	8,36%	12,19%	11,51%
Remainder	3,29%	2,47%	3,80%	4,36%	3,70%	3,33%	3,23%	3,59%	3,00%
Total	11867	5134	2529	1904	2300	1351	3993	3561	2962

16. COMING BACK & NPS

We asked the visitors and former visitors if they plan to visit the museum again in the future. In the European results, we find that no less than **77% of the respondents answered 'yes'** to this question. 20% don't know yet, and only a minority of 3% answer 'no, definitely not'. In the Netherlands this number is even higher. Dutch respondents are more likely to recommend the museum to family, friends and colleagues

Intention to visit the museum again	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	76,62%	77,03%	77,91%	72,85%	77,53%	75,02%	80,96%	82,85%	64,68%
I don't know yet	19,93%	19,89%	17,58%	22,61%	20,12%	21,93%	16,98%	14,58%	28,95%
No, definitely not	3,45%	3,08%	4,51%	4,55%	2,34%	3,05%	2,06%	2,57%	6,37%
Total	14203	6396	2725	2309	2773	1441	4806	4205	3751

We asked people who indicated that they would (possibly) not visit the museum again, about the reasons for this. For the largest group of these people, the reason is that they have seen the collection and do not feel the need to come back (43%). The argument to not visit again because the collection has been seen is less important for the Dutch than average (NL 34% / EU 43%).

26% visited the museum as part of a holiday and 25% prefer to alternate museums so that they only visit the museum once. In the Netherlands this number is even higher: 41%. This can be due to the fact that many of the larger Dutch museums participating in this study are important Amsterdam-based tourist attractions. A similar conclusion can be made for museums in Cluster A & D. Respectively 29% and 37% of visitors indicated that they would not visit the museum again because they visited this while they were on holiday. In cluster B, a significantly larger group indicate not to visit the museum again, because they were not satisfied with their last visit (12,98%). Finally another remarkable difference can be found in Cluster 1 where 10,06% indicated they visited the museum as part of a school excursion and therefore would not return. This was also a significantly more important reason for visitors of smaller museums (10 and 13%).

Reasons not to visit the museum again	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
I've seen the collection, I don't need to come again	43,29%	43,46%	46,76%	50,32%	32,48%	44,13%	47,91%	44,37%	39,29%
I like to switch things up and visit museums only once	25,45%	23,96%	24,96%	33,97%	20,90%	20,95%	25,16%	30,88%	23,92%
I don't feel comfortable or welcome visiting the museum	2,87%	3,15%	2,83%	1,92%	3,22%	3,35%	1,76%	5,15%	2,27%
I visited the museum as part of a holiday	26,09%	28,54%	16,64%	18,91%	36,66%	29,05%	14,84%	17,52%	37,70%
I was not satisfied with my visit	7,26%	4,52%	12,98%	7,53%	7,88%	4,47%	4,07%	11,40%	7,95%
I came with my school or association	5,26%	10,06%	1,66%	1,44%	1,29%	9,78%	12,75%	2,36%	0,45%
The prices are not favorable	3,30%	3,29%	3,33%	2,88%	3,70%	4,47%	2,75%	4,73%	2,57%
I used to come for my children, but not anymore	2,36%	1,23%	2,66%	6,09%	0,96%	1,12%	1,76%	5,15%	1,59%

The museum is difficult to reach (mobility)	1,57%	1,51%	0,67%	2,24%	1,93%	1,68%	2,09%	1,67%	1,14%
The museum is not sufficiently accessible (e.g. for people with disabilities or the elderly)	1,09%	1,37%	0,83%	0,32%	1,45%	0,56%	1,32%	1,39%	0,91%
The opening hours are not favorable	0,82%	0,62%	1,00%	0,64%	1,29%	1,40%	0,99%	1,11%	0,38%
I prefer the digital museum offer	0,63%	0,89%	0,17%	0,80%	0,32%	0,28%	1,10%	0,42%	0,53%
Remainder	15,54%	12,18%	17,97%	16,67%	19,94%	14,25%	13,08%	17,25%	16,65%
Total	3308	1461	601	624	622	358	910	719	1321

We also asked visitors and former visitors whether they would recommend the museum to family, friends or colleagues. They could give a score from 1 (not recommend at all) to 10 (highly recommend). This question is often used to calculate the "*Net Promoter Score*" (NPS), a way to measure customer loyalty.

The NPS is calculated by adding the percentages of respondents who answered 9 or 10. They are labelled as promoters of the museum: enthusiasts who like to encourage those around them to come to the museum. Next, the respondents who gave a score of 6 or lower are summed up. They are seen as critics who would be more likely to not recommend the museum to friends or family. If you subtract both sums from each other (promoters – critics) and multiply them by 100, you get a figure between -100 and +100. An NPS that is higher than 0 is considered positive.

The *Net Promoter Score* is popular because it is very easy to compare with other players, inside or outside the industry. Whether an NPS is good or bad can therefore mainly be read within the context of the sector. Overall the European museums score very high with an average NPS of 53.

Recommend museum	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
1 (not at all likely)	0,81%	0,77%	1,08%	0,88%	0,61%	0,97%	0,64%	0,60%	1,21%
2	0,47%	0,44%	0,58%	0,46%	0,43%	0,42%	0,54%	0,47%	0,39%
3	0,90%	0,86%	1,36%	0,88%	0,58%	0,97%	0,85%	1,07%	0,76%
4	1,10%	0,95%	1,74%	0,98%	0,90%	1,04%	1,20%	1,02%	1,07%
5	3,02%	3,55%	3,25%	2,42%	1,98%	3,27%	3,57%	2,71%	2,50%
6	3,73%	3,65%	3,87%	4,53%	3,21%	4,03%	3,76%	3,41%	3,90%
7	8,74%	7,83%	9,96%	10,09%	8,76%	8,96%	9,21%	8,08%	8,72%
8	18,34%	16,11%	18,91%	21,68%	20,59%	20,36%	16,81%	18,32%	19,60%
9	14,10%	13,35%	14,65%	14,52%	15,04%	14,38%	13,22%	13,76%	15,56%
10 (very likely)	48,80%	52,49%	44,60%	43,56%	47,89%	45,59%	50,21%	50,56%	46,30%
Total	13684	6388	2581	1942	2773	1439	4842	3837	3566

17. VISIT TO OTHER MUSEUMS

To create an idea of the 'mobility' of visitors between different museums, the respondents were asked whether they also visit museums other than the museum in their survey. Respondents were able to indicate what type of museums they still visit. The vast majority of respondents in Europe (90%) also visit other museums. Churches, castles and fortresses are popular (56%), followed by modern and contemporary art (46%), ancient arts (36%) and history or archaeology (35%).

Important differences can be noted between the clusters. **For cluster C for example, we see the highest percentage of visitors indicating that they do not visit other museums** (12,18%), compared to the other clusters. This can be due to the fact that these museums are most often visited within an educational context. Another observation is that the visitors indicate to visit mostly museums in the same categories as the one they filled in the survey for.

Visit to other museums	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	10,05%	11,50%	9,15%	12,18%	5,37%	11,90%	10,09%	9,12%	10,57%
Yes: Ancient Arts	35,88%	35,25%	35,66%	28,30%	45,51%	25,65%	34,55%	36,59%	41,49%
Yes: Modern or contemporary arts	45,98%	39,12%	53,57%	37,07%	62,66%	36,14%	46,36%	48,12%	46,61%
Yes: Fine Arts	20,10%	19,10%	18,55%	12,76%	32,02%	12,64%	19,52%	18,26%	27,28%
Yes: Applied arts (photography, design, jewelry, fashion, diamonds, comics, ...)	24,81%	20,99%	30,41%	20,37%	31,89%	20,62%	25,62%	26,04%	23,59%
Yes: Physics	5,91%	4,54%	5,74%	9,89%	5,37%	5,40%	4,68%	6,44%	7,19%
Yes: Technology or Science	21,86%	19,77%	24,32%	30,01%	15,56%	29,19%	20,56%	21,82%	20,53%
Yes: History or Archaeology	35,00%	38,68%	29,43%	35,54%	32,23%	33,63%	33,83%	38,01%	32,70%

Yes: Local History or Folklore	27,18%	32,40%	25,10%	23,69%	20,58%	27,49%	28,61%	29,20%	21,75%
Yes: Heritage site	23,95%	26,09%	22,39%	18,95%	25,78%	21,51%	23,70%	24,06%	25,26%
Yes: Art Gallery, Art Fair	18,50%	15,29%	24,67%	12,97%	24,54%	13,75%	19,15%	18,96%	18,99%
Yes: Church, monumental church, castle, fortress	55,78%	59,58%	52,55%	49,75%	56,68%	52,03%	57,12%	55,48%	55,95%
Remainder	4,51%	4,01%	3,91%	7,15%	3,74%	4,80%	4,61%	4,99%	3,48%
Total	13259	5685	2841	2406	2327	1353	4422	4551	2933

18. SPILLOVER EFFECT

Economic impact can then be measured in various layers. First of all, a measurement is often made of direct economic impact: this includes all expenditure by cultural institutions themselves (for example on employees, but also operational expenditure) and any expenditure by visitors. In addition to direct impact**, indirect effects** can also be considered. The indirect impact includes the impact of local organisations that purchase goods and services from other local organisations because they want to meet the demand of the cultural visitor.

We also gauged the impact that the museum has on its direct environment, in the sense that the museum provides activity in the city, municipality and region in which it is located. We asked the respondents who are visitors (and former visitors) whether they did any other activities in the city of the museum as a result of their visit to the museum. In the case of European museums, we see that there is a great deal of cross-pollination: only 44% indicated that they only visit the museum. For Cluster D this is only 27%. Also in case of bigger museums we also see a lower percentage with more visitors indicating they participated in other activities apart from the museum visit. In most cases they indicate that they also visited other exhibitions in the city (38%). In general visiting the hospitality industry (36%), visiting other museums (23%) and shopping (19%) are the most popular side activities.

Other activities in city/region	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No, only visited the museum	43,98%	40,54%	53,07%	59,66%	27,44%	48,25%	44,87%	58,12%	29,65%
Yes, visited other museums or exhibitions in the city	22,67%	26,50%	14,41%	11,03%	34,32%	19,89%	17,58%	10,94%	37,80%
Yes, attended an event (concert, musical, festival, religious event, ...)	8,17%	9,24%	7,56%	4,10%	10,28%	8,33%	8,21%	3,94%	11,60%
Yes, enjoyed the nightlife	2,22%	2,49%	1,57%	0,74%	3,65%	1,48%	1,92%	1,02%	3,79%

Yes, attended a conference or business meeting	1,63%	1,61%	1,26%	1,47%	2,21%	0,67%	2,94%	0,95%	1,53%

We then asked if people had travelled to the city in question because of their visit to the museum. In the European results, we see that almost half (48%) have indeed travelled to the city, municipality or region for the sake of the museum, or partly because of the museum. In this way, the museums clearly contribute to the (economic) activity in the area.

Visit to the city / region for the sake of museum visits	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes, I travelled to the city specifically because of my museum visit	30,34%	26,41%	38,08%	37,10%	25,82%	40,78%	23,62%	39,56%	25,79%
Yes, I travelled to the city partly because of my museum visit	17,93%	18,76%	15,39%	14,94%	20,88%	19,90%	15,77%	13,05%	24,33%
No, I didn't travel to the city specifically because of my museum visit	51,73%	54,82%	46,53%	47,96%	53,30%	39,31%	60,61%	47,39%	49,88%
Total	12429	5244	2508	1981	2696	1226	4141	3425	3637

We asked the respondents who travelled to the city in question because of their visit to the museum (or partly because of their visit to the museum), how much they spent in the municipality, city or region. We asked them for an estimate of the amount they spent together with their group, and asked them to think about travel, hotel, food and drink, shopping, etc.

The largest group of European respondents spent up to €100 (59%), followed by the €101 to €250 category. Locally, we notice large differences between the various museums, presumably linked to the location of the museum.

Spending in city / region	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Less than €100	59,19%	53,51%	63,94%	75,63%	55,29%	58,42%	65,43%	76,90%	35,99%
€101 > €250	16,21%	18,38%	15,87%	11,67%	15,69%	18,37%	14,71%	13,14%	19,96%
€251 > €500	8,36%	10,29%	6,93%	4,43%	8,51%	8,93%	7,20%	3,60%	14,12%
€501 > €1000	6,20%	7,81%	3,08%	1,92%	8,13%	3,32%	2,67%	0,83%	15,30%
€1001 > €2500	3,27%	3,20%	1,54%	1,03%	5,86%	1,28%	1,34%	0,35%	8,35%
More than €2500	0,79%	0,45%	0,62%	0,44%	1,70%	0,26%	0,82%	0,07%	1,70%
I don't have a clue	5,98%	6,35%	8,01%	4,87%	4,82%	9,44%	7,82%	5,12%	4,58%
Total	4163	1779	649	677	1058	392	972	1446	1353

Finally, we showed some statements about the impact of the museum to the respondents. We showed them the statements "I think the presence of the museum is important for the region" and "The museum has an important value in society". If we abstract from the respondents who answered "not relevant / I don't know", we find in Europe that:

- 91% agree or strongly agree with the statement that the museum's presence is important for the region.
- 89% agree or strongly agree with the statement that the museum has an important value in society.

The museum and society / region	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
I think the presence of the museum is important for the region	11580	4946	1989	1968	2677	1298	4014	2985	3283
Strongly disagree	1,35%	0,63%	1,71%	1,83%	2,05%	1,77%	0,90%	1,21%	1,86%
Disagree	1,09%	0,71%	1,06%	2,24%	0,97%	0,85%	0,82%	1,31%	1,31%
Neutral	5,96%	4,85%	8,04%	9,96%	3,51%	6,93%	5,95%	6,90%	4,72%
Agree	28,42%	27,17%	29,31%	33,64%	26,22%	28,81%	28,67%	29,82%	26,68%
Totally agree	61,49%	65,49%	58,22%	48,58%	66,01%	60,02%	62,48%	58,56%	63,51%
The museum has an important value in society	11586	5006	1972	1952	2656	1286	4083	2950	3267
Strongly disagree	1,12%	0,52%	1,42%	1,38%	1,84%	1,40%	1,15%	1,15%	1,47%
Disagree	1,25%	0,90%	1,77%	2,20%	0,83%	1,09%	1,36%	1,36%	1,32%
Neutral	8,23%	8,01%	11,76%	10,91%	4,03%	12,13%	7,97%	7,97%	5,69%
Agree	33,60%	34,12%	34,48%	38,27%	28,54%	35,07%	36,37%	36,37%	29,97%
Totally agree	53,99%	54,95%	49,04%	43,85%	63,29%	48,37%	50,98%	50,98%	59,90%
Not Relevant / Don't Know	1,81%	1,50%	1,52%	3,38%	1,47%	1,94%	2,17%	2,17%	1,65%

Linked to the value of the museum for its environment and society, we also showed some statements about the expectations that the respondents had about the role of museums in society. We asked the visitors and past visitors to indicate the 3 points that were most important to them in the proposed list of roles and responsibilities of the museum. Respondents who indicated "I don't know / I don't have an opinion on this" were unable to indicate other options.

In Europe, we notice that the 46% indicated that museums should appreciate the local culture and traditions. 33% say museums should use local resources as much as possible. 32% indicate that museums should take care of the use of resources such as light, water, etc.

A museum should...	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
... taking care of the use of resources (such as light, water, etc.)	31,72%	31,80%	29,52%	36,61%	28,76%	28,00%	32,03%	33,48%	30,23%
... Use local resources as much as possible	33,24%	37,97%	31,56%	32,91%	25,22%	36,30%	36,89%	34,79%	26,13%
... contribute to the well-being of the local population	18,38%	16,24%	19,51%	19,61%	20,64%	15,38%	18,28%	19,08%	18,46%
... Creating new jobs	14,38%	16,81%	12,36%	13,84%	11,57%	14,06%	14,11%	15,07%	13,93%
... Boosting tourism	26,95%	29,01%	26,15%	26,83%	23,49%	27,88%	29,55%	23,08%	28,30%
... Showing community involvement	22,15%	19,01%	26,61%	22,72%	24,31%	22,12%	21,80%	22,14%	22,59%
... supporting local culture and traditions	46,30%	57,34%	38,66%	34,31%	41,45%	50,96%	48,98%	43,44%	45,28%
... stimulating new cultural productions	25,41%	19,53%	37,74%	18,58%	33,68%	24,52%	25,24%	24,69%	26,75%

... participate in the development of local/national cultural policies	23,07%	20,31%	26,00%	19,70%	29,53%	24,16%	21,01%	22,70%	25,70%
I don't know / I don't have an opinion on this	7,05%	5,11%	5,31%	11,45%	8,33%	5,65%	5,05%	8,57%	8,00%
Total	11269	4777	1958	2218	2316	832	3665	3722	3050

19. DIGITAL MUSEUM OFFERINGS

The digital offerings of museums are becoming more important. The corona crisis has given a boost to the digital offer and seems to have definitively set the digital movement in motion. We therefore included a number of questions about digital offerings in the study. It is interesting to evaluate how the digital evolution is adopted by the museums .

The offerings shown in the following tables have been adjusted in each survey, based on the offerings that each museum actually has. The results are therefore a reflection of the visitors' answers about digital museum visits, but also depend on the offer that is actually available at the participating museums in this study.

We asked whether the visitors had made use of digital museum offerings BEFORE their visit to the museum. 52% of European respondents answered "no" to this. 45% looked up information about the exhibition they would visit later.

Use of digital offerings BEFORE museum visits	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	51,88%	51,30%	55,39%	58,70%	47,62%	49,27%	62,10%	46,57%	52,66%
Yes, an online video tour of the museum	0,90%	0,60%	0,70%	0,00%	2,20%	0,00%	1,40%	0,87%	0,82%
Yes, to look up additional information about an exhibition I want to visit	45,28%	46,06%	40,98%	39,34%	48,93%	47,82%	34,98%	51,10%	43,99%
Yes, to see high definition images of the artworks	1,13%	0,76%	0,23%	0,36%	2,82%	0,00%	0,70%	0,99%	1,71%
Yes, a virtual tour where I could walk through the museum digitally	1,00%	1,25%	0,23%	1,33%	0,58%	1,87%	1,78%	0,93%	0,51%
Yes, a live online tour of the museum given by a guide or the director of the museum	0,17%	0,02%	0,23%	0,09%	0,52%	0,00%	0,13%	0,09%	0,31%

Yes, a podcast, organized by a museum	0,27%	0,21%	0,00%	0,18%	0,58%	0,00%	0,32%	0,12%	0,44%
Yes, an online performance (theatre, opera, musical,...) organised by a museum	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
Yes, an online class, course, workshop,... Organized by the museum	0,56%	0,65%	0,23%	0,71%	0,42%	0,00%	0,19%	0,50%	0,92%
Yes, an online game or quiz through the museum	0,18%	0,09%	0,94%	0,18%	0,05%	0,42%	0,06%	0,03%	0,38%
Yes, I have watched a film or documentary via the museum's website or online platform	1,83%	1,81%	2,58%	0,09%	2,56%	3,95%	1,46%	2,42%	1,02%
Yes, I participated in another online activity of the museum. Specify:	1,23%	1,25%	1,05%	0,80%	1,52%	1,04%	0,83%	1,40%	1,30%
Total	8209	4316	854	1126	1913	481	1575	3223	2930

We then asked them whether they had made use of digital museum offerings AFTER their visit to the museum. 77% of European respondents did not. 20% of the European respondents looked up additional information about the exhibition they had visited.

Use of digital offerings AFTER museum visit	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	76,97%	76,57%	74,15%	79,27%	77,37%	70,27%	79,34%	76,16%	77,79%
Yes, an online video tour of the museum	0,57%	0,39%	0,53%	0,00%	1,31%	0,00%	0,76%	0,53%	0,61%
Yes, to look up additional information about an exhibition	19,86%	20,09%	24,24%	17,88%	19,24%	25,57%	17,55%	20,90%	18,93%
Yes, to see high definition images of the artworks	1,39%	1,07%	0,36%	0,44%	2,98%	0,00%	0,70%	1,43%	2,02%
Yes, a virtual tour where I could walk through the museum digitally	0,76%	0,84%	0,71%	0,80%	0,58%	1,25%	1,46%	0,65%	0,38%
Yes, a live online tour of the museum given by a guide or the director of the museum	0,15%	0,05%	0,36%	0,00%	0,42%	0,00%	0,13%	0,09%	0,27%
Yes, a podcast, organized by the museum	0,20%	0,23%	0,00%	0,18%	0,21%	0,00%	0,32%	0,16%	0,23%
Yes, an online performance (theatre, opera, musical,...) organised by the museum	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
Yes, an online class, course, workshop,... Organized by the museum	0,43%	0,49%	0,00%	0,89%	0,16%	0,00%	0,19%	0,28%	0,84%

Yes, an online game or quiz through the museum	0,20%	0,35%	0,00%	0,00%	0,05%	0,00%	0,06%	0,09%	0,46%
Yes, I have watched a film or documentary via the museum's website or online platform	1,19%	1,42%	0,53%	0,44%	1,31%	4,16%	1,02%	1,33%	0,57%
Yes, I participated in another online activity of the museum. Specify:	0,82%	0,91%	0,71%	0,89%	0,63%	1,46%	0,89%	0,90%	0,57%
Total	7904	4306	561	1124	1913	481	1573	3225	2625

Frequency of use of digital offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Daily	0,76%	0,73%	0,73%	0,97%	0,71%	0,37%	1,54%	0,37%	0,94%
At least once a week	3,69%	4,06%	3,87%	3,51%	2,72%	3,33%	1,88%	4,56%	3,50%
At least once a month	13,78%	13,74%	14,77%	16,37%	11,82%	14,81%	13,36%	16,40%	10,90%
Once every three months	16,89%	16,76%	18,89%	16,57%	16,43%	18,15%	15,92%	20,59%	12,99%
At least once a year	23,65%	25,21%	16,95%	25,15%	21,99%	28,52%	25,34%	25,22%	20,39%
Less than once a year	10,78%	11,23%	7,02%	10,92%	11,35%	10,00%	12,67%	10,54%	10,43%
This was a one-time online visit	20,92%	20,18%	27,85%	14,81%	23,17%	16,67%	20,55%	13,81%	29,61%
Never	9,54%	8,08%	9,93%	11,70%	11,82%	8,15%	8,73%	8,51%	11,24%
Total	3962	2190	413	513	846	270	584	1622	1486

We asked people who used digital offerings before or after their museum visit how often they use them. For the largest group (21%) this was a one-off, for 34% annually or less than once a year.

To gain insight into the awareness of the digital offer, we asked the respondents how they discovered the digital offer. Search engines appear to be the most important among European respondents (44%), followed by the museum's newsletter (21%) and a physical visit to the museum (18%).

How did people discover digital offerings?	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Online advertisement	4,91%	5,78%	3,86%	4,96%	3,30%	5,81%	4,41%	4,85%	5,07%
Search engine (e.g. Google, Bing, ...)	44,18%	47,79%	41,48%	38,84%	39,62%	41,91%	43,91%	40,20%	50,00%
Via the museum's newsletter	21,00%	15,72%	27,33%	24,17%	29,06%	22,41%	21,00%	27,12%	12,61%
During a visit to the museum	18,10%	18,18%	21,22%	20,87%	15,75%	16,60%	22,32%	17,92%	16,52%
A brochure of the museum	9,06%	9,59%	11,25%	11,57%	6,13%	9,96%	12,48%	9,86%	6,16%
The website of the museum's city or town	8,29%	7,88%	8,68%	9,30%	8,58%	7,88%	7,64%	6,75%	10,72%
Through friends or acquaintances	6,04%	6,13%	8,04%	5,37%	5,57%	8,71%	7,20%	5,56%	5,65%
Via television or radio	1,86%	2,01%	1,29%	1,45%	1,89%	1,66%	1,47%	1,74%	2,25%
Via social media (Facebook, X (Twitter), ...)	11,09%	12,53%	7,40%	11,57%	8,87%	15,77%	10,87%	12,20%	8,91%
Remainder	5,51%	4,86%	4,82%	4,75%	7,45%	4,98%	4,55%	5,45%	6,16%
Total	4138	2283	311	484	1060	241	681	1836	1380

We asked the users of digital museum offerings whether they had paid for it. In Europe, only a small minority of 5% indicated that they had paid for digital museum offerings.

Paid for digital offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Yes	4,68%	4,67%	1,71%	3,55%	6,58%	1,90%	2,80%	3,38%	7,33%
No	95,32%	95,33%	98,29%	96,45%	93,42%	98,10%	97,20%	96,62%	92,67%
Total	2051	1370	175	141	365	158	286	829	778

We also asked the users of digital museum offerings about the reasons why they made use of this. **Preparing for the museum visit** (49%) turned out to be the most important argument for the European respondents. When using digital offerings BEFORE a museum visit, we also found that looking up additional information about the exhibitions before visiting the museum was the main reason. 34% of respondents in Europe used digital museum offerings out of curiosity, 21% to discover new things or for practical reasons.

Reasons for the use of digital offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Because it was the only visit option (practical reasons: the museum only exists virtually or was closed so that it could only be visited online)	2,50%	2,44%	1,90%	2,57%	2,88%	1,87%	3,05%	2,39%	2,50%
Because for me personally it is the only option to visit (limited mobility, illness, not accessible by public transport, the museum is abroad)	1,76%	1,60%	2,86%	2,57%	1,25%	1,87%	2,44%	1,45%	1,76%
Because it's easier to get a closer look at the artifacts online and find additional information	11,87%	11,18%	11,75%	8,71%	15,88%	8,24%	9,15%	11,38%	14,47%

To reduce stress and tension	3,23%	3,50%	1,59%	2,97%	3,25%	2,25%	3,05%	2,89%	3,89%
To improve my mood	3,23%	3,37%	1,27%	3,37%	3,50%	4,87%	1,68%	3,46%	3,38%
To combat boredom	1,91%	1,91%	0,95%	2,57%	1,88%	2,62%	1,83%	1,89%	1,84%
Because i had to (e.g. from school, parents, …)	0,59%	0,44%	0,63%	1,58%	0,38%	1,12%	1,22%	0,31%	0,51%
To develop myself / learn something	14,15%	12,47%	14,92%	17,03%	16,75%	16,48%	13,87%	11,64%	16,75%
To discover new things	21,50%	21,16%	21,27%	26,14%	19,63%	23,22%	22,10%	20,63%	21,90%
Out of curiosity	34,36%	33,98%	32,38%	36,63%	34,75%	39,33%	35,37%	34,84%	32,33%
For professional reasons, for academic reasons	7,92%	8,12%	8,25%	8,12%	7,13%	5,99%	12,80%	6,35%	7,79%
To stimulate / educate my children, to entertain my children	2,17%	2,53%	0,63%	3,17%	1,13%	3,37%	1,37%	2,08%	2,42%
To prepare for my visit to the museum	48,63%	48,58%	57,14%	44,16%	48,25%	47,94%	47,87%	51,07%	46,29%
To learn more after my visit to the museum	16,11%	16,33%	20,95%	15,05%	14,25%	16,10%	18,29%	16,10%	15,06%
For practical reasons (buying tickets, etc.)	20,73%	20,45%	14,92%	14,65%	27,63%	11,61%	14,63%	17,61%	29,10%
Remainder	1,24%	1,38%	0,95%	0,99%	1,13%	2,25%	1,37%	1,38%	0,81%
Total	3874	2254	315	505	800	267	656	1590	1361

Finally, we showed the users of digital museum offerings some statements about digital museum visits. If we exclude the people who indicated "no opinion / not relevant", we see the following results in Europe:

- 59% agree (or strongly agree) with the statement that they are less attentive during a digital museum visit than during a physical museum visit
- Only 11% expect interaction with others while using online museum offerings
- 53% agree (or strongly agree) with the statement that online museum visits allow them to see collections or content that they would normally never be able to view "live"
- Only 16% consider the digital museum offer a worthy alternative to a live visit
- 78% of European respondents agreed with the statement that the online offer is good for preparing a live visit
- Finally, 73% agreed with the statement that the online offer is good for deepening a live visit after the visit

In summary, the usefulness and place of digital museum offerings seems relevant, but this should be seen in addition to the classic "live" museum offerings. The digital offer therefore seems to strengthen the museum offer, without replacing or threatening it.

Looking at the country-specific data, Dutch respondents indicate more than average that an online museum tour does reduce their attentiveness during a live visit (agrees + completely agrees NL 31% / EU 49%, but with no opinion NL 32% / EU 18%).

Statements about digital offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
When taking an online tour of a museum, I am less attentive than during a physical visit.	949	553	75	2	319	157	151	453	188
Strongly disagree	3,90%	3,07%	4,00%	0,00%	5,33%	3,18%	2,65%	4,42%	4,26%
Disagreeing	10,64%	11,03%	2,67%	0,00%	11,91%	9,55%	6,62%	12,14%	11,17%
Neutral	19,49%	18,99%	20,00%	0,00%	20,38%	18,47%	19,87%	16,34%	27,66%
Once	29,72%	31,10%	34,67%	0,00%	26,33%	32,48%	35,10%	27,81%	27,66%
Totally agree	18,65%	19,17%	14,67%	50,00%	18,50%	19,75%	17,88%	21,41%	11,70%
No opinion / Not relevant	17,60%	16,64%	24,00%	50,00%	17,55%	16,56%	17,88%	17,88%	17,55%
When I use an online museum offer, I want to be able to interact with others online	3888	2141	304	426	1017	265	546	1804	1273
Strongly disagree	19,34%	19,10%	18,09%	18,54%	20,55%	13,58%	18,50%	20,73%	18,93%

Disagreeing	27,73%	27,79%	28,95%	25,35%	28,22%	26,04%	24,91%	28,05%	28,83%
Neutral	28,86%	27,88%	31,91%	33,80%	27,93%	32,45%	31,68%	28,88%	26,87%
Once	7,10%	7,71%	5,26%	10,33%	5,01%	8,68%	8,61%	6,04%	7,62%
Totally agree	2,29%	2,94%	0,33%	1,41%	1,87%	2,64%	2,75%	2,00%	2,44%
No opinion / Not relevant	14,69%	14,57%	15,46%	10,56%	16,42%	16,60%	13,55%	14,30%	15,32%
Through an online museum visit, I can see collections/content that I would normally never be able to view live	3953	2139	304	494	1016	264	547	1800	1342
Strongly disagree	3,64%	3,88%	2,96%	2,63%	3,84%	1,89%	2,93%	4,33%	3,35%
Disagreeing	9,01%	9,54%	6,91%	9,51%	8,27%	7,20%	7,13%	10,39%	8,27%
Neutral	27,65%	27,96%	27,63%	25,91%	27,85%	31,44%	31,08%	27,06%	26,30%
Once	33,85%	33,19%	36,18%	38,46%	32,28%	33,33%	33,46%	32,83%	35,47%
Totally agree	11,79%	12,25%	12,17%	11,74%	10,73%	9,85%	13,53%	10,28%	13,49%
No opinion / Not relevant	14,07%	13,18%	14,14%	11,74%	17,03%	16,29%	11,88%	15,11%	13,11%
Digital museum content is a worthy alternative to a live visit	3942	2132	302	495	1013	265	545	1797	1335
Strongly disagree	21,79%	22,09%	23,51%	19,80%	21,62%	20,00%	20,55%	24,26%	19,33%
Disagreeing	36,94%	37,29%	33,77%	34,55%	38,30%	33,96%	34,31%	38,17%	36,93%
Neutral	20,40%	20,40%	24,17%	20,81%	19,05%	23,40%	23,49%	19,31%	20,00%
Once	12,05%	11,73%	11,92%	15,96%	10,86%	11,32%	12,29%	10,68%	13,93%
Totally agree	2,92%	2,77%	1,99%	4,24%	2,86%	3,02%	4,22%	2,00%	3,60%
No opinion / Not relevant	5,91%	5,72%	4,64%	4,65%	7,31%	8,30%	5,14%	5,56%	6,22%
The museum's online content is a good way to prepare for a live visit	3958	2142	304	496	1016	265	548	1800	1345
Strongly disagree	0,88%	0,98%	0,33%	1,41%	0,59%	1,51%	1,09%	0,83%	0,74%
Disagreeing	2,10%	2,24%	1,32%	3,63%	1,28%	3,40%	2,55%	1,72%	2,16%
Neutral	17,23%	16,67%	17,76%	18,95%	17,42%	22,64%	18,07%	16,72%	16,51%
Once	54,07%	55,04%	54,93%	53,23%	52,17%	51,32%	51,82%	56,22%	52,64%
Totally agree	18,82%	18,53%	21,05%	17,94%	19,19%	13,58%	20,62%	17,72%	20,59%

No opinion / Not relevant	6,90%	6,54%	4,61%	4,84%	9,35%	7,55%	5,84%	6,78%	7,36%
The museum's online content is a good way to deepen a live visit (after the visit)	0	2136	300	493	1013	264	544	1795	1339
Strongly disagree	29,72%	0,80%	1,00%	0,81%	0,89%	1,14%	0,55%	0,72%	1,05%
Disagreeing	18,65%	2,67%	3,00%	4,06%	2,57%	1,89%	3,31%	3,29%	2,24%
Neutral	17,60%	20,79%	18,67%	19,68%	19,84%	21,97%	20,22%	20,17%	20,01%
Once	38,88%	49,02%	51,67%	50,30%	46,79%	50,76%	48,35%	49,81%	47,27%
Totally agree	19,34%	17,32%	18,00%	17,44%	16,58%	14,77%	19,67%	15,60%	18,82%
No opinion / Not relevant	27,73%	9,41%	7,67%	7,71%	13,33%	9,47%	7,90%	10,42%	10,60%

Many respondents were not yet making use of digital museum products. It is important to note that these are respondents who completed a survey from a museum that does have a digital offer. When asked about the reasons why they do not (yet) make use of the digital museum offer, we see in Europe that a lack of awareness is the main reason (39%). There is certainly an opportunity here for further promoting the digital offer. 35% indicated that they were not interested, 22% did not have time.

Reasons not to use digital offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Not interested	35,36%	35,99%	36,10%	31,02%	36,97%	33,98%	32,78%	41,03%	30,92%
No time	22,03%	21,01%	21,99%	22,77%	24,07%	21,36%	23,52%	20,00%	23,44%
I didn't know this existed	38,76%	37,32%	32,78%	46,53%	38,16%	41,75%	38,30%	33,80%	44,08%
No computer, tablet or internet connection available	2,00%	2,30%	1,66%	2,15%	1,20%	1,46%	2,19%	1,77%	2,22%
No place in the house to enjoy it	0,59%	0,51%	0,83%	0,50%	0,80%	0,00%	0,77%	0,74%	0,41%
I don't have enough quality devices to enjoy it (screen, speakers, headphones, ...)	2,39%	2,56%	2,07%	2,31%	2,13%	0,97%	3,21%	2,14%	2,38%
I'm not sure about the quality	0,73%	0,56%	0,83%	0,99%	0,93%	0,00%	0,39%	0,66%	1,15%
I didn't find anything that appealed to me	3,26%	3,53%	4,15%	2,97%	2,53%	3,40%	2,83%	3,91%	2,80%
It was too expensive	0,11%	0,10%	0,00%	0,17%	0,13%	0,00%	0,39%	0,07%	0,00%
No suitable offer in my preferred language	0,31%	0,31%	0,41%	0,50%	0,13%	0,00%	0,39%	0,30%	0,33%
Remainder	7,99%	8,23%	10,79%	6,44%	7,71%	8,74%	9,64%	8,34%	6,41%
Total	3555	1956	241	606	752	206	778	1355	1216

Finally, we asked respondents who do not make use of the digital museum offer which kind of offer might interest them. On a European scale, we see that 30% indicate "none of these" and therefore show no interest in digital products. 28% would find a virtual tour of the museum interesting, 25% the opportunity to find more information about the museum's collection.

Potential interest in digital offerings	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
Livestream organised by the museum	6,91%	6,77%	6,37%	6,93%	7,42%	9,71%	6,28%	7,31%	6,58%
Virtual tour of the museum	28,38%	29,51%	24,34%	25,58%	28,71%	25,24%	30,27%	26,72%	28,97%
Possibility to walk through the museum digitally yourself	16,60%	16,41%	16,10%	15,18%	18,30%	14,08%	16,08%	15,57%	18,68%
Possibility to consult the collection online	16,53%	14,35%	13,48%	15,18%	24,28%	21,36%	11,35%	17,34%	19,75%
Possibility to find more information about the museum's collection online	25,39%	23,77%	22,10%	27,72%	29,07%	30,58%	23,30%	25,09%	26,83%
Podcast offered by the museum	15,23%	12,56%	14,61%	19,14%	19,74%	11,17%	13,50%	15,65%	17,12%
Online courses organized by the museum	12,06%	10,63%	6,74%	15,84%	14,83%	16,02%	10,23%	11,66%	13,58%
Online quiz or game organized or facilitated by the museum	10,23%	8,88%	7,49%	19,64%	7,89%	13,11%	11,35%	10,70%	8,15%
Online platform with films and documentaries linked to the museum	16,37%	17,04%	12,73%	23,43%	10,65%	25,24%	16,94%	16,09%	14,65%
None of these	29,50%	31,52%	29,21%	24,75%	27,63%	27,67%	29,32%	31,51%	27,74%
Remainder	0,96%	0,76%	1,12%	1,82%	0,84%	1,46%	1,20%	0,96%	0,66%
Total	3939	2230	267	606	836	206	1163	1355	1215

Finally, all respondents (from the museums that had included the questions about digital offerings in their survey) were asked whether they also participate in other cultural online activities. This broadens the view from digital museum offerings to a broader cultural online offering. **67% of European respondents said they did not participate in other cultural activities online.** 17% have already attended online classes, webinars, courses or workshops. 14% followed a podcast.

Participation in other cultural online activities	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	66,99%	67,97%	62,10%	63,77%	68,80%	67,01%	63,90%	64,61%	71,90%
Yes, a theatrical performance (theatre, stand-up comedy, musical, etc.)	7,35%	7,06%	9,25%	8,22%	6,64%	5,43%	7,52%	8,80%	5,76%
Yes, a dance performance	2,38%	2,25%	2,14%	2,98%	2,44%	2,51%	1,78%	2,39%	2,64%
Yes, an opera performance	5,12%	5,38%	6,76%	3,81%	4,54%	1,46%	6,03%	5,44%	5,12%
Yes, a classical concert or festival	8,24%	7,74%	12,63%	7,39%	8,16%	3,97%	9,69%	9,07%	7,40%
Yes, a non-classical concert (pop, rock, …) or festival	5,78%	5,88%	7,47%	6,56%	4,12%	8,98%	5,64%	6,45%	4,12%
Yes, a class, webinar, course, workshop (e.g. yoga class, music lessons, …)	17,26%	16,55%	19,04%	20,98%	15,81%	19,42%	18,89%	19,34%	13,00%
Yes, a party or DJ set	1,86%	1,98%	2,49%	1,79%	1,26%	2,09%	2,08%	2,01%	1,48%
Yes, a game or quiz (aimed at a wide audience)	3,77%	3,63%	2,85%	5,48%	3,36%	2,71%	5,64%	3,82%	2,96%
Yes, a reading session of a book, poetry, …	3,77%	3,43%	5,34%	3,69%	4,04%	3,76%	4,65%	4,13%	2,80%
Yes, a podcast	14,14%	13,30%	17,08%	15,97%	13,88%	15,03%	15,23%	15,59%	11,36%

Yes, a film via a special film platform (e.g. Lumière, Dalton, ...), so NOT Netflix or digital television)	2,78%	2,28%	3,74%	3,93%	2,94%	2,92%	2,97%	2,66%	2,80%
Remainder	1,34%	1,15%	2,14%	1,79%	1,18%	1,25%	1,68%	1,24%	1,32%
Total	5974	3384	562	839	1189	479	1011	2591	1893

20. NON-VISITORS

As indicated in the introduction to this report, there was the possibility for museums to survey non-visitors as well. Separate communication materials were provided for this purpose. Many museums have made use of this. Of course, you can ask non-visitors a more limited number of relevant questions.

This chapter collects all the questions that were asked to the non-visitors. These questions cover several themes that are also addressed elsewhere in the report.

The most important question we wanted to ask the non-visitors was, of course, 'why' they don't visit the museum. 34% of the non-visitors in Europe indicated that they did not (yet) find time to visit the museum. 21% simply haven't thought about the museum yet. Linked to this, 18% do not know the museum sufficiently. In addition to time, familiarity / communication seems to be the main reason. Important to note is that over 30%of respondents has an 'other reason' to not go to the museum (yet), which indicates we haven't (yet) found the real reason for people not going.

According to older study "Why people choose (not) to visit a museum" (Hood, 1983) showed that for infrequent and non-visitors the motives "Social activities", "Relaxing in a pleasant place" are particularly important in their leisure activities: "Being with people or social interaction", "Feeling comfortable and at ease in one's surrounding", "Participating actively" were frequently mentioned. From the perspective of the non-visitors, museum locations are often intimidating places without such a feel-good character. However, as can be seen in the impact-section if this report. This does not seem to be the view of the respondents in this survey. However, most of them are regular museum visitors, which of course colours the data.

Reason why museum not (yet) visited	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
I don't care about the offer (collection)	3,19%	3,55%	3,00%	3,51%	2,14%	0,98%	4,88%	3,81%	1,86%
I don't like to visit museums	2,79%	4,11%	0,91%	2,81%	1,96%	2,16%	4,11%	2,16%	1,86%
I don't feel at home in a museum	1,12%	1,25%	0,52%	1,26%	1,42%	0,39%	1,47%	1,00%	1,12%
I'd rather go to other museums	6,07%	5,85%	5,09%	6,32%	7,65%	3,93%	5,42%	8,13%	6,71%
I haven't thought about visiting the museum (namemuseum) yet	21,38%	21,45%	23,76%	22,19%	16,90%	18,86%	23,93%	23,55%	18,27%
I don't know the museum (namemuseum) or I don't know enough	17,69%	18,66%	19,97%	14,33%	16,37%	19,45%	21,77%	19,73%	10,81%
I haven't found time to visit the museum yet	33,89%	35,45%	37,21%	29,35%	31,14%	33,20%	36,56%	34,99%	30,38%
I prefer other museums	2,45%	2,23%	2,09%	2,95%	2,85%	1,57%	2,56%	3,81%	1,96%
The museum is too expensive	2,39%	2,37%	1,57%	3,09%	2,67%	2,16%	2,63%	1,99%	2,42%
The offer for children does not appeal to me	1,06%	1,25%	0,52%	1,26%	1,07%	0,00%	1,78%	1,16%	0,65%
The museum is difficult to reach (mobility)	4,60%	5,50%	3,39%	5,06%	3,38%	4,91%	4,73%	4,81%	4,19%
The museum is not accessible enough (e.g. for people with disabilities or the elderly)	0,60%	0,49%	0,52%	0,70%	0,89%	0,98%	0,39%	0,66%	0,65%
The opening hours are not favorable	1,44%	1,67%	0,78%	0,84%	2,49%	1,18%	1,08%	2,49%	1,40%

Due to the closure of the museum during COVID-19	1,87%	2,16%	2,09%	1,83%	0,89%	1,96%	2,25%	1,49%	1,58%
I prefer the digital museum offer	1,09%	1,32%	1,04%	1,26%	0,36%	0,98%	1,39%	0,66%	1,03%
Other reason	30,24%	27,79%	27,55%	35,25%	33,81%	33,20%	22,31%	28,52%	39,33%
Total	5974	3384	562	839	1189	479	1011	2591	1893

It is interesting to know whether the non-visitors of each museum are museum visitors of other museums. At the European level, we notice that 16% do not visit museums, and therefore that the vast majority of 84% do visit other museums. Churches, castles and fortresses are the most popular (50%), followed by modern and contemporary art (38%), history or archaeology (30%) and ancient arts (29%). This is "relatively" in line with the results among visitors, but the figures are "absolutely" lower, so fewer museums are visited by this group.

Visit to other museums (non-visitors)	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	16,41%	17,99%	11,40%	20,68%	12,39%	17,81%	18,16%	11,31%	16,28%
Yes: Ancient Arts	29,25%	26,18%	31,89%	26,02%	40,60%	24,28%	27,88%	32,78%	31,84%
Yes: Modern or contemporary arts	37,93%	30,40%	48,98%	32,35%	54,91%	30,94%	36,38%	43,93%	40,39%
Yes: Fine Arts	14,94%	12,10%	16,28%	13,50%	24,79%	9,71%	14,12%	15,14%	18,92%
Yes: Applied arts (photography, design, jewelry, fashion, diamonds, comics, ...)	20,55%	17,62%	28,49%	15,05%	26,50%	18,71%	20,68%	24,46%	19,02%
Yes: Physics	5,87%	5,52%	4,88%	8,16%	5,13%	7,01%	5,76%	5,49%	5,60%
Yes: Technology or Science	24,69%	24,38%	27,68%	27,00%	17,52%	29,68%	24,28%	20,97%	24,72%
Yes: History or Archaeology	30,24%	31,82%	28,09%	28,97%	30,13%	30,94%	29,25%	31,28%	30,62%
Yes: Local History or Folklore	22,99%	26,67%	22,12%	21,24%	14,32%	26,44%	22,48%	24,96%	20,55%
Yes: Heritage site	18,74%	20,78%	18,59%	12,52%	21,37%	19,24%	17,65%	21,30%	18,41%
Yes: Art Gallery, Art Fair	15,36%	11,60%	18,32%	15,61%	23,29%	11,33%	14,48%	14,98%	19,13%
Yes: Church, monumental church, castle, fortress	50,48%	52,61%	50,34%	45,01%	51,71%	52,16%	49,57%	51,75%	50,05%
Remainder	5,50%	5,77%	6,51%	5,06%	3,63%	6,29%	5,55%	7,15%	3,97%
Total	3528	1612	737	711	468	556	1388	601	983

We also asked non-visitors some questions about the "museum of the future".

And just like the visitors, the non-visitors were allowed to choose up to 3 items from a list of possible aspects of the museum of the future. We notice the following top 5 among European non-visitors:

- Interactive experiences (52%)
- Immersive experiences (34%)
- A freely accessible meeting place (27%)
- Supporting young artists (24%)
- A more sustainable - eco-friendly museum (23%)

This list is almost identical to the list of museum visitors. The same 5 items are in the top 5, with the order of the last 3 items differing.

Museum of the future (non-visitors)	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
A freely accessible meeting place	27,09%	27,29%	29,92%	23,70%	27,65%	23,88%	28,71%	33,53%	22,93%
Children's play area	14,56%	13,97%	16,90%	18,50%	7,77%	16,04%	16,51%	15,69%	11,47%
Childcare	6,25%	6,38%	5,43%	6,65%	6,44%	4,10%	6,15%	5,69%	7,19%
Performances	10,62%	9,25%	12,56%	9,39%	12,69%	10,07%	10,10%	11,18%	11,08%
Online games related to the exhibitions	10,39%	11,84%	9,30%	13,58%	4,55%	9,70%	12,47%	9,80%	8,55%
Discussion forums and debates	15,48%	17,67%	15,66%	12,28%	14,96%	16,04%	17,12%	17,45%	12,54%
Interactive Experiences	51,80%	51,71%	49,92%	62,14%	40,72%	54,85%	50,31%	50,78%	53,16%
Immersive (immersive) experiences	34,28%	35,15%	28,99%	40,17%	31,25%	37,31%	32,22%	35,49%	35,18%
Supporting young or new artists	23,66%	17,76%	33,49%	19,51%	29,17%	17,54%	26,51%	25,29%	21,28%
Possibility to curate your own exhibition	4,31%	3,70%	5,89%	3,61%	4,55%	3,36%	4,48%	5,29%	3,89%
Possibility for a fully online visit / online virtual tour	10,59%	11,38%	10,70%	7,37%	13,07%	13,43%	11,06%	10,00%	9,62%
A more sustainable - eco-friendly museum	22,84%	25,44%	23,26%	21,97%	18,18%	21,64%	26,78%	23,33%	18,56%

A museum that is more focused on well-being	10,12%	9,99%	10,08%	10,98%	9,28%	12,31%	8,96%	13,33%	9,23%
A place where I can meet other people (public living room)	14,32%	12,67%	19,69%	11,99%	14,20%	17,91%	14,49%	17,45%	11,66%
I want to be able to influence what is shown	5,16%	5,37%	5,27%	6,21%	3,22%	4,48%	5,62%	4,51%	5,15%
I want to have the opportunity to be a partial owner of some artworks	3,33%	2,78%	4,34%	3,61%	2,84%	1,12%	3,34%	4,90%	3,11%
None of these	4,72%	5,18%	4,50%	2,60%	6,82%	4,10%	3,78%	4,71%	5,93%
No opinion	6,38%	7,03%	5,12%	5,35%	7,95%	8,21%	5,97%	4,31%	7,39%
Total	2946	1081	645	692	528	268	1139	510	1029

The statements about the role of museums in society were also presented to the non-visitors. They were also allowed to indicate the 3 most important points from the list below.

Among European non-visitors, we notice that the 43% indicated that museums should appreciate the local culture and traditions. 34% indicate that museums should take care of the use of resources such as light, water, and so on. And another 34% say museums should use local resources as much as possible. Here, too, we notice that the same statements are the most important as with the visitors.

A museum should... (non-visitors)	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
... taking care of the use of resources (such as light, water, etc.)	34,08%	33,89%	33,43%	35,43%	33,48%	32,35%	36,16%	34,27%	31,94%
... Use local resources as much as possible	33,69%	35,37%	36,87%	30,94%	29,10%	37,87%	33,25%	36,70%	31,30%
... contribute to the well-being of the local population	19,65%	20,09%	20,90%	17,34%	20,13%	21,69%	19,75%	20,41%	18,48%
... Creating new jobs	16,66%	15,19%	16,42%	18,09%	18,38%	19,12%	17,64%	13,48%	16,56%
... Boosting tourism	28,79%	27,41%	26,57%	33,18%	28,88%	26,84%	27,87%	23,97%	33,23%
... Showing community involvement	24,10%	24,26%	24,33%	24,22%	23,19%	30,51%	24,07%	25,47%	21,47%
... supporting local culture and traditions	43,25%	45,93%	41,19%	41,55%	42,45%	44,85%	43,12%	40,26%	44,66%
... stimulating new cultural productions	23,12%	16,67%	32,54%	21,52%	26,91%	17,28%	25,49%	24,72%	21,05%
... participate in the development of local/national cultural policies	14,92%	14,26%	15,37%	14,50%	16,41%	10,29%	13,58%	16,48%	16,99%
I don't know / I don't have an opinion on this	7,13%	7,50%	5,97%	6,73%	8,53%	9,56%	6,88%	6,93%	6,84%
Total	2876	1080	670	669	457	272	1134	534	936

Finally, we also asked non-visitors whether they had made use of the digital offerings of the museum. After all, it is possible that they have visited the museum digitally, but not physically. 89% of non-visitors in Europe (of museums with a digital offer) indicated that they have also not used the digital offer. 4% indicated that they had watched a film or documentary via the museum's website or platform.

Use of digital offerings WITHOUT a museum visit	Europe	A	B	C	D	FTE 1	FTE 2	FTE 3	FTE 4
No	88,73%	86,77%	89,41%	90,52%	89,93%	81,48%	86,96%	90,25%	89,66%
Yes, an online video tour of the museum	2,27%	3,34%	1,69%	0,00%	3,36%	3,70%	4,63%	0,91%	1,39%
Yes, a virtual tour where I could walk through the museum digitally	2,61%	2,65%	1,69%	3,40%	2,01%	6,17%	2,74%	3,40%	1,89%
Yes, a live online tour of the museum given by a guide or the director of the museum	0,43%	0,00%	0,00%	0,00%	2,01%	0,00%	0,00%	0,00%	0,89%
Yes, a podcast, organized by the museum	0,57%	0,81%	0,00%	0,72%	0,22%	0,00%	0,86%	0,91%	0,30%
Yes, an online performance (theatre, opera, musical,...) organised by the museum	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%
Yes, an online class, course, workshop,... Organized by the museum	1,04%	1,15%	1,69%	1,25%	0,22%	0,00%	0,17%	0,45%	1,89%
Yes, an online game or quiz through the museum	0,62%	0,81%	1,27%	0,54%	0,00%	0,00%	0,34%	0,45%	0,89%

Yes, I have watched a film or documentary via the museum's website or online platform	4,03%	5,06%	5,51%	3,22%	2,24%	7,41%	4,29%	4,76%	3,28%
Yes, I participated in another online activity of the museum. Specify:	1,14%	1,27%	0,42%	0,89%	1,57%	2,47%	1,37%	0,68%	1,09%
Total	2111	869	236	559	447	81	583	441	1006

21. CONCLUSION

Based on the current report, several important conclusions can be drawn. These are in line with international researches, and the pilot study of this research in Flemish and Brussels museums from 2022. In the overview below, we indicate which striking figures emerge from the current research.

Important to remember is that it was predominantly the more highly educated core audience of the museums that took part in the survey. This could also explain why the motives for visiting museums were more content-related and educational interests were more important than social and leisure motives. The educational motive is the most important motive for respondents.

1: Overall the regular museum visitor is very satisfied with the museum offerings

At the start of this study, we asked visitors and past visitors about their general satisfaction with their last museum visit. In Europe in general, and at most museums individually, we noticed a very high level of satisfaction. 65% indicated that they were very satisfied, 27% are satisfied. Overall the European museums also score very high with an average NPS (Net Promoter Score) of 53.

2: European museums have a very positive impact on the well-being of visitors

In general, we note that museums have a very positive impact on the well-being of their visitors. However, the increase in knowledge comes before emotional and wellbeing effects. Museums are seen as a safe haven. The museum is thought-provoking and helps to think critically . The statement that the museum offers new knowledge and broadens the view even higher. However as a meeting place, the museums still have some room for further growth. The museum as third place where people can meet each other, has a lot of potential. Of course this is also related to the type of museum and the architecture. At first sight, this sounds logical due to the nature of the offerings of many museums, but it may also offer an opportunity for future developments, definitely when linked to other findings, and taking into account the importance of the social role of museums within the new definition of ICOM. As mentioned, for future museums, respondents would most frequently like to see more interaction, while all other options were mentioned in roughly equal measure by a quarter of respondents. It is interesting to note that a quarter of them also advocate expanding the museum's tasks and positioning it as a public meeting place and seen as a "third space", beside the personal and working space.

3: There seem to be opportunities for "the digital museum"

The study shows that most of respondents have never visited a museum digitally. Those who did, either viewed the collection online or followed a virtual tour. Respondents who indicated that they had already visited a museum digitally in some way, indicated that they had also visited the museum in question live before their visit. In slightly less than half of the cases, it was a one-off experiment. There are only very few regular online museum visitors. Of course, this is also strongly related to the offer: this is still growing strongly and can also improve in quality. The role of a digital offer currently seems to be mainly an extra addition to the 'physical' museum visit.

4: Relatively limited country-specific differences.

It is also striking that there are hardly any significant differences between the respondents in the various countries, meaning that the museum audience is very similar across Europe. However we must be careful with these conclusions as only a rather limited amount of museums participated to the study in certain countries, and therefore this study is not covering “all museums of Europe”.

There are however some differences we can note between German & Dutch data. First of all, Dutch respondents used the audio tour (17%) and museum app (13%) more often than the European average (7%, 4% resp.) while the European average uses the services of a professional guide more (12% vs. 4%). The availability of professional museum guides will likely vary among the countries, and Dutch museums on average seem to have reverted more to media interfaces such as audio tours and apps available, with which the Dutch visitors seem to be more satisfied than average.

When it comes to the company with whom visitors come to the museum, the largest group of museum visitors in Europe comes with their partner (35%), followed by 'friends or acquaintances' (21%) and family (19%). 'Alone' (18%) and 'with the children' (15%) were also often indicated. Looking at the type of museum, we see that art museums are more often visited alone and with a partner or friends, and museums with a focus other than art are more often visited with children or family. Especially museums for Science are significantly more visited within the context of a school visit. Looking at the country-specific data, some other differences can be detected. The largest group of museum visitors in Germany and Europe come with their partner (34% : 35%), followed by family (22% : 19%) and friends or acquaintances (21% each) or “with children” (13% : 15%). In contrast, comparatively few people go to the museum alone (17% : 18%), which shows that museum visits are mostly social events. In Germany also, more respondents indicated to have visited the museum within the context of a school visit (7, 59%), or socially with an association or for work, where as in the Netherlands the amount of visits together with a partner, lies higher than the European average. Significant differences are seen in the visits in school contexts as well in the Netherlands: NL 0,5% and average 5%. Given that this indicates young visitors, it is important to combine this with the fact that also the visits with parents (3.05% NL vs 3,75%) EU and family (16% vs 19%) are lower for the Dutch than average.

Finally 26% of European respondents visited the museum as part of a holiday and 25% prefer to alternate museums so that they only visit the museum once.

5: The museum of the future is a place for interactive experiences and an accessible meeting place.

We asked respondents what they think the museum of the future should offer. The European rop 5 consisted of

- Interactive experiences (43%)
- Immersive experiences (29%)
- Supporting young artists (26%)
- A more sustainable - eco-friendly museum (25%)
- A freely accessible meeting place (24%)

Furthermore, we see in the that the Museum of the Future is a place where everyone is welcome to discover and celebrate art and culture. The museum supports up and coming talents. There is a great diversity of art and culture, including interactive activities for adults and children, and a combination of analogue and digital technologies. The museum of the future should offer a combination of modern technology, such as multimedia facilities and an online offering, with the more traditional offering. There is a good balance between learning, experiencing and doing. And it offers an interactive experience with modern technologies such as AI, QR codes, apps and VR. The museum should be an open (third) place where everyone is welcome with attractive spaces, supporting its function as a place where people can meet each other. It should be a place where you can learn about history and discover a variety of cultures, where interaction with other people is possible, with a focus on talent, authenticity, diversity, fantasy, critical thinking and creativity. These expectations are in line with the recently approved ICOM definition (Prague, August 2022): "A museum is a not-for-profit, permanent institution in the service of society that researches, collects, preserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability. They operate and communicate ethically, professionally and with the participation of communities, offering varied experiences for education, enjoyment, reflection and knowledge sharing."