

Visitors' Survey on Major Museums
under Leisure and Cultural Services Department

Background

In November 2004, the Leisure and Cultural Services Department (LCSD) appointed Mercado Solutions Associates Ltd. (MSA) to conduct a survey on frequent visitors of seven museums¹ and infrequent visitors. The objective of the survey was to collect information to facilitate LCSD to further improve its museum services to meet the expectation of the public in the future and to devise suitable marketing and promotional strategies.

Methodology

2. Fieldwork for the Survey was conducted in November 2004. For the museum visitors, an “exit-interview” approach was adopted and target respondents were randomly selected at the respective museums for face-to-face interviews. As for infrequent visitors, target respondents were those who had not visited any of the seven museums in the past four years and they were enquired by the telephone interviewing method. In total, 5 021 individuals were successfully interviewed at the seven museums (some 720 cases for each museum) and 1 004 infrequent visitors were

¹ The seven museums covered in the Survey are Hong Kong Museum of Art, Hong Kong Museum of History, Hong Kong Science Museum, Hong Kong Space Museum, Hong Kong Heritage Museum, Hong Kong Museum of Coastal Defence and Flagstaff House Museum of Teaware (also known as Museum of Teaware).

successfully interviewed out of 3 300 persons contacted using the telephone interviewing method.

Survey Findings

3. Salient points of the survey are highlighted below for members' easy reference. A copy of the executive summary of the survey is given at **Annex A**.

(a) Museum Visitors

Frequent Visitors

Characteristics of the Visits

- Except for the Science Museum, more than half of the visitors to all other museums were their first time visit to the museums. Moreover, except for the Museum of Coastal Defence and the Museum of Teaware, more than one-tenth of the visitors claimed that they had visited the respective museum for 5 times or more in the past 4 years.
- It was observed that visitors mostly knew about the museums by “just passing by”, “word of mouth” and “school”; and to a less extent by means of “newspaper / magazine”, “poster / banner / outdoor billboard” and “travel guidebook / map”.
- For the Museum of Art, the Heritage Museum, the Museum of

History and the Space Museum, many of the visitors claimed that they visited the museums because they were especially interested in the specific theme of the museum. On the other hand, for the Museum of Coastal Defence and the Science Museum, the visits were made mainly due to “accompanying friends / relatives” whereas for the Museum of Teaware, mainly due to “just passing by”.

- Except for the Space Museum and the Museum of Teaware, museum visitors usually stayed for more than one hour on average, with visitors of the Science Museum stayed for the longest time of 115.8 minutes on average. As for the Space Museum and the Museum of Teaware, the average length of stay was 56.5 minutes and 33.8 minutes respectively.
- About one-tenth of the visitors (11.2%) of the Science Museum claimed that they had participated in its education and public programmes while the participation rate for other museums was only about 2% - 6%.

Views on museum facilities and services

- Most of the visitors (more than 75%) were very / quite satisfied with the exhibitions of the museums while very few (less than 3%) of the visitors were very / quite dissatisfied.
- Most of the visitors (more than 75%) considered the facilities of the museums satisfying (very / quite satisfied) while about 1%

of visitors were very / quite dissatisfied.

- The overall satisfaction of the museum visitors with the respective museums was high, ranging from 73.9% to 96.2%.
- Most of the visitors (more than 85%) claimed that they would visit the museum again.

Infrequent Visitors

Factors affecting their decision to visit museums

- Using the Museum of Art as an example, the main reason for not visiting the museum in the past 4 years was “no time / too busy” (51.4%), followed by “have no interest in this museum” (19.8%) and “have no interest in any museums at all” (14.1%). The reasons quoted for other museums fall within similar percentages.
- More than one-tenth of the infrequent visitors considered the following factors definitely affecting their decision : “transportation” (15.1%), “promotion” (14.5%), “admission fee” (12.5%), “theme of the exhibition” (11.6%) and “interest value of exhibits” (11.6%).
- The types of exhibitions or exhibits that would attract infrequent visitors, in order of priority, were “history” (15.3%), followed by “science / technology” (10.4%), “antiques” (9.1%) and “astronomy / space” (8.6%).

Awareness of museum activities

- About half of the infrequent visitors (50.5%) considered the publicity of the museums very / quite inadequate, only 15.6% considered the opposite and 16.2% considered average.

- Some 22% of the infrequent visitors were aware of the free admission to the museums under the management of LCSD on Wednesdays.
- Only 5.6% of the infrequent visitors were aware of the weekly, half-yearly and yearly passes of the museums whereas the majority of the infrequent visitors were not aware of any of the passes.
- 77.4% of the infrequent visitors considered TV as the most effective promotion channel.

(b) Tourist Visitors

4. In the survey, it was also noted that among the 5 021 visitors interviewed, 1 077 (21.4%) were visitors coming from either overseas or Mainland China. A chart showing the tourist visitors profile at **Annex B**.

Leisure and Cultural Services Department

1 Executive Summary

Background & Objectives

The Leisure and Cultural Services Department (LCSD) had appointed Mercado Solutions Associates Ltd. (MSA) to conduct a survey in November 2004 with the aims of seeking a better understanding of the characteristics of museum visitors and infrequent visitors, as well as the factors that would encourage them to visit the museums.

The survey covered seven major museums viz:

1. Hong Kong Museum of Art;
2. Hong Kong Museum of History;
3. Hong Kong Science Museum;
4. Hong Kong Space Museum;
5. Hong Kong Heritage Museum;
6. Hong Kong Museum of Coastal Defence; and
7. Flagstaff House Museum of Teaware.

Methodology

Two groups of target respondents were covered in the survey, namely

1. The visitors group covered all persons aged 12 or above who visited the seven major museums during the fieldwork period; and
2. The infrequent visitors group covered all persons aged 15 or above who had not visited any of the seven museums in the past 4 years.

For visitors group, an “exit-interview” approach was adopted for which enumerators were stationed at the exit of the museums and randomly selected the target respondents for the interviews. The fieldwork period was spread out over the week from Monday to Sunday (except the closing day of the museums) so as to ensure a wide coverage of different visitors.

In total, 5 021 individuals were successfully enumerated during the fieldwork period from 1st November to 14th November 2004. The enumeration results for each museum are as follows:

	Total Contacts	Unsuccessful Cases	Successful Cases	Response Rate (%)	Fieldwork period
Museum of Art	734	16	718	98	1 – 13 Nov
Museum of Coastal Defence	724	8	716	99	1 – 14 Nov
Heritage Museum	771	54	717	93	1 – 13 Nov
Museum of History	738	21	717	97	1 – 7 Nov
Science Museum	735	17	718	98	1 – 14 Nov
Space Museum	735	16	719	98	1 – 7 Nov
Museum of Teaware	735	19	716	97	1 – 14 Nov
Total	5 172	151	5 021	97	-

As for infrequent visitors group, telephone-interviewing method was adopted for which household telephone numbers were randomly selected from the latest Residential Directories. Within the selected household, a person aged 15 or above was randomly selected for interview by means of the “last birthday” selection process. Once the target respondent was identified, he / she was asked whether had visited any of the 7 museums in the past 4 years. Only those who had not visited were invited to participate in the survey.

A total of 3 300 persons were contacted during the fieldwork period between 1st November and 8th November 2004. Among these persons, 1 824 were found to be ineligible for the interview (i.e. ever visited any of the 7 museums in the past 4 years) and 1 004 were successfully enumerated using the telephone interviewing method, which constituted an overall response rate of 68.0%.

Major Findings – Visitors Group

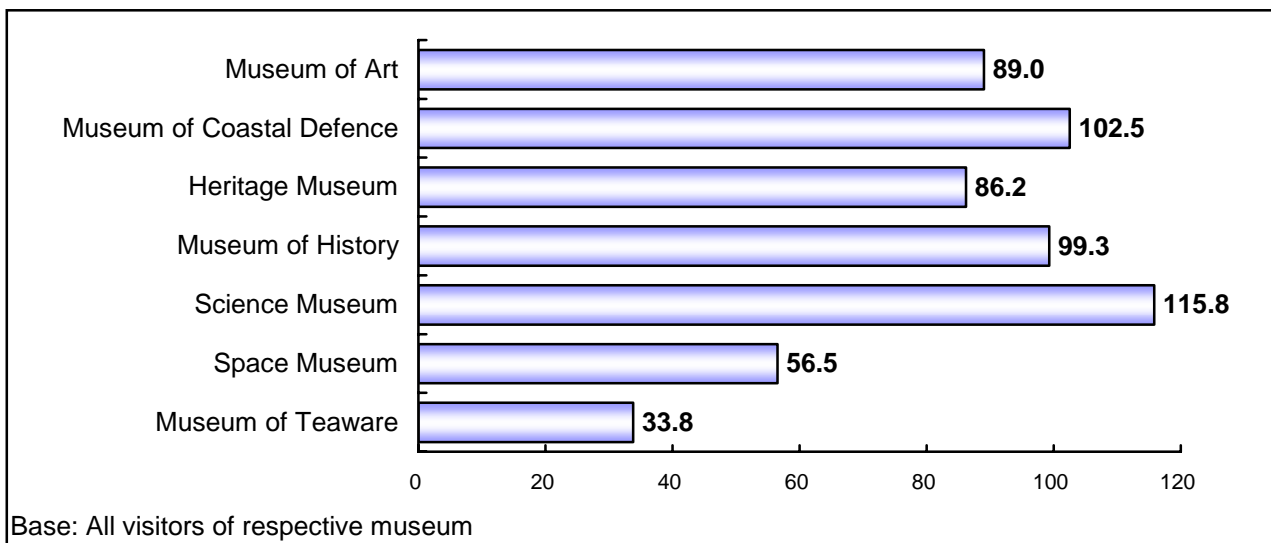
- It was observed that visitors mostly knew about the museums by “just passing by”, “word of mouth” and “school”; and to a less extent by means of “newspaper / magazine”, “poster / banner / outdoor billboard” and “travel guidebook / map”.

Top 3 major channels of knowing about the museums

Museum of Art (%)	Museum of Coastal Defence (%)	Heritage Museum (%)	Museum of History (%)	Science Museum (%)	Space Museum (%)	Museum of Teaware (%)
Just passing by (35.2%)	Word of mouth (33.5%)	Just passing by (26.9%)	Word of mouth (24.7%)	School (23.7%)	Just passing by (26.0%)	Just passing by (36.3%)
Word of mouth (15.2%)	Newspaper / Magazine (16.5%)	School (23.8%)	School (22.9%)	Word of mouth (18.0%)	Word of mouth (18.9%)	Travel guidebook / map (14.0%)
School (11.4%)	School (11.5%)	Word of mouth (18.3%)	Just passing by (13.9%)	Newspaper / Magazine (17.8%)	Poster / banner / Outdoor billboard (17.4%)	Word of mouth (12.4%)

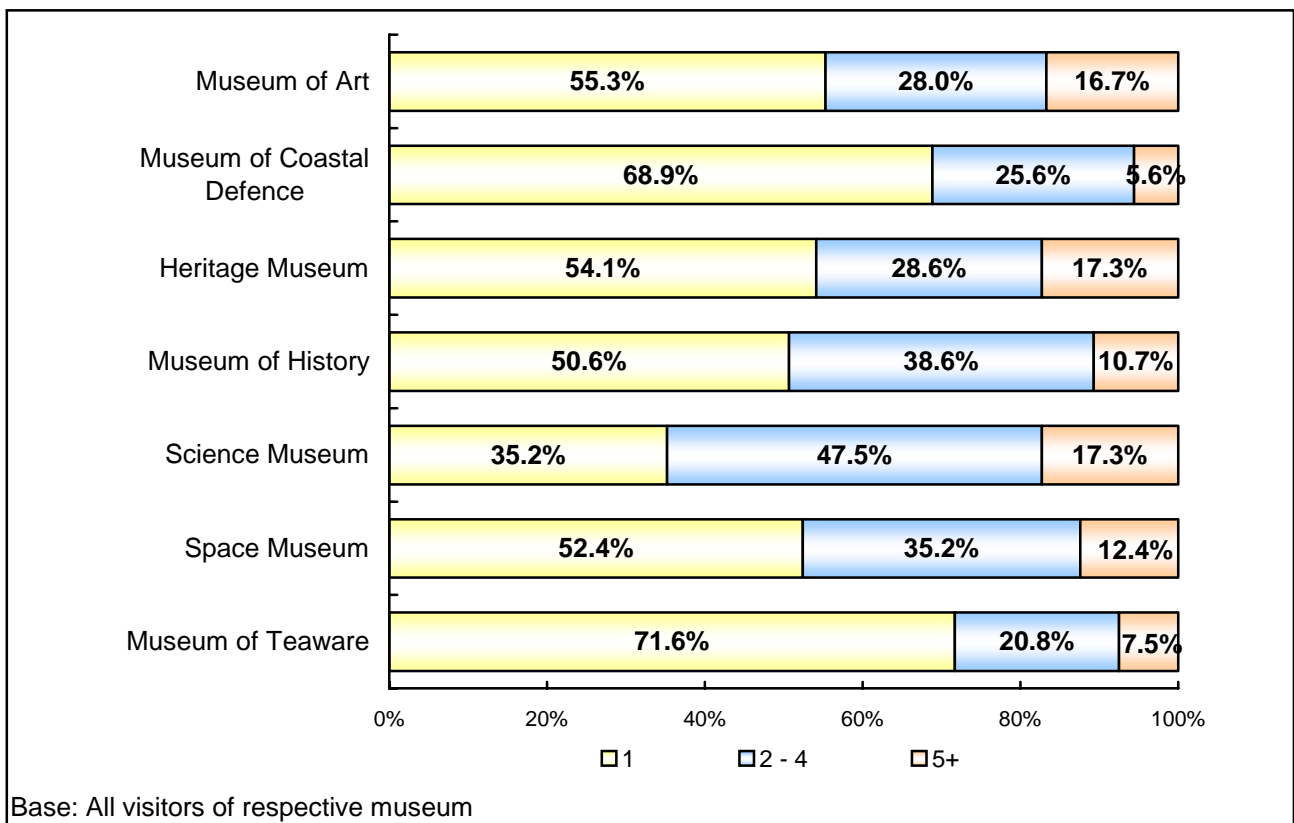
- Except for Space Museum and Museum of Teaware, museum visitors usually stayed for more than one hour on average, with visitors of Science Museum stayed the longest time of 115.8 minutes on average. As for Space Museum and Museum of Teaware, the average length of stay was 56.5 minutes and 33.8 minutes respectively.

Average length of stay in museums (in minutes)



- Except for Science Museum, more than half of the visitors to all other museums were their first time visit to the museums. Moreover, except for Museum of Coastal Defence and Museum of Teaware, more than one-tenth of the visitors claimed they had visited the respective museum for 5 times or more in the past 4 years.

Number of times visiting (including the current visit) the Museums in the past 4 years



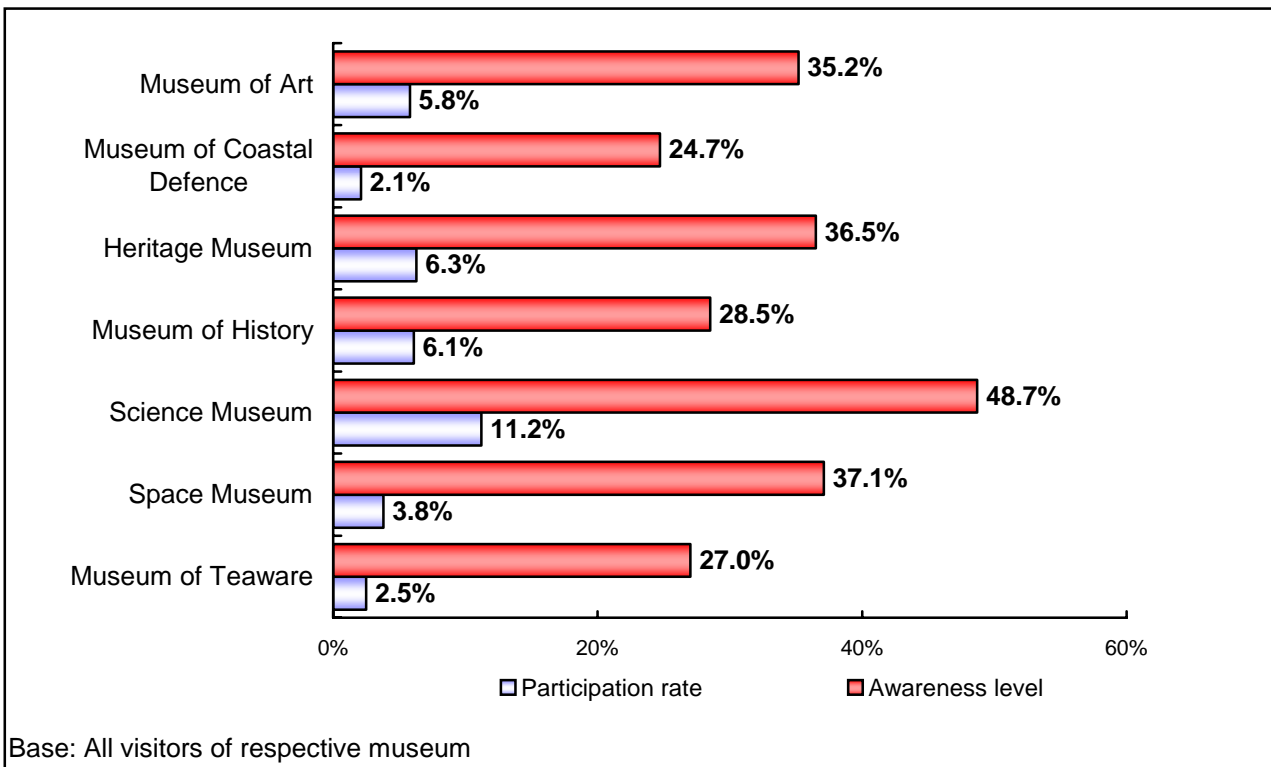
- In terms of the major reason of visiting the museums, it was observed that for Museum of Art, Heritage Museum, Museum of History and Space Museum, many of the visitors claimed they visited the museum as they were especially interested in the main theme of the museum. On the other hand, those visiting the Museum of Coastal Defence and Science Museum were mainly to accompany friends / relatives whereas those visiting the Museum of Teaware mainly as they were just passing by.

Top 3 major reasons of visiting the museums

Museum of Art (%)	Museum of Coastal Defence (%)	Heritage Museum (%)	Museum of History (%)	Science Museum (%)	Space Museum (%)	Museum of Teaware (%)
Esp. interested in main theme (39.1%)	To accompany friends/relatives (33.7%)	Esp. interested in main theme (30.1%)	Esp. interested in main theme (24.8%)	To accompany friends/relatives (29.1%)	Esp. interested in main theme (34.8%)	Just passing by (45.9%)
Just passing by (22.3%)	Esp. interested in main theme (22.1%)	Arranged by school (23.4%)	Arranged by school (20.5%)	Esp. interested in main theme (22.8%)	To accompany friends/relatives (27.4%)	Esp. interested in main theme (21.6%)
Esp. interested in special exhibitions (11.3%)	Rec'd by friends / relatives / colleagues (13.4%)	To accompany friends/relatives (15.1%)	To accompany friends/relatives (18.3%)	Esp. interested in special exhibition (15.3%)	Just passing by (17.7%)	To accompany friends/relatives (10.8%)

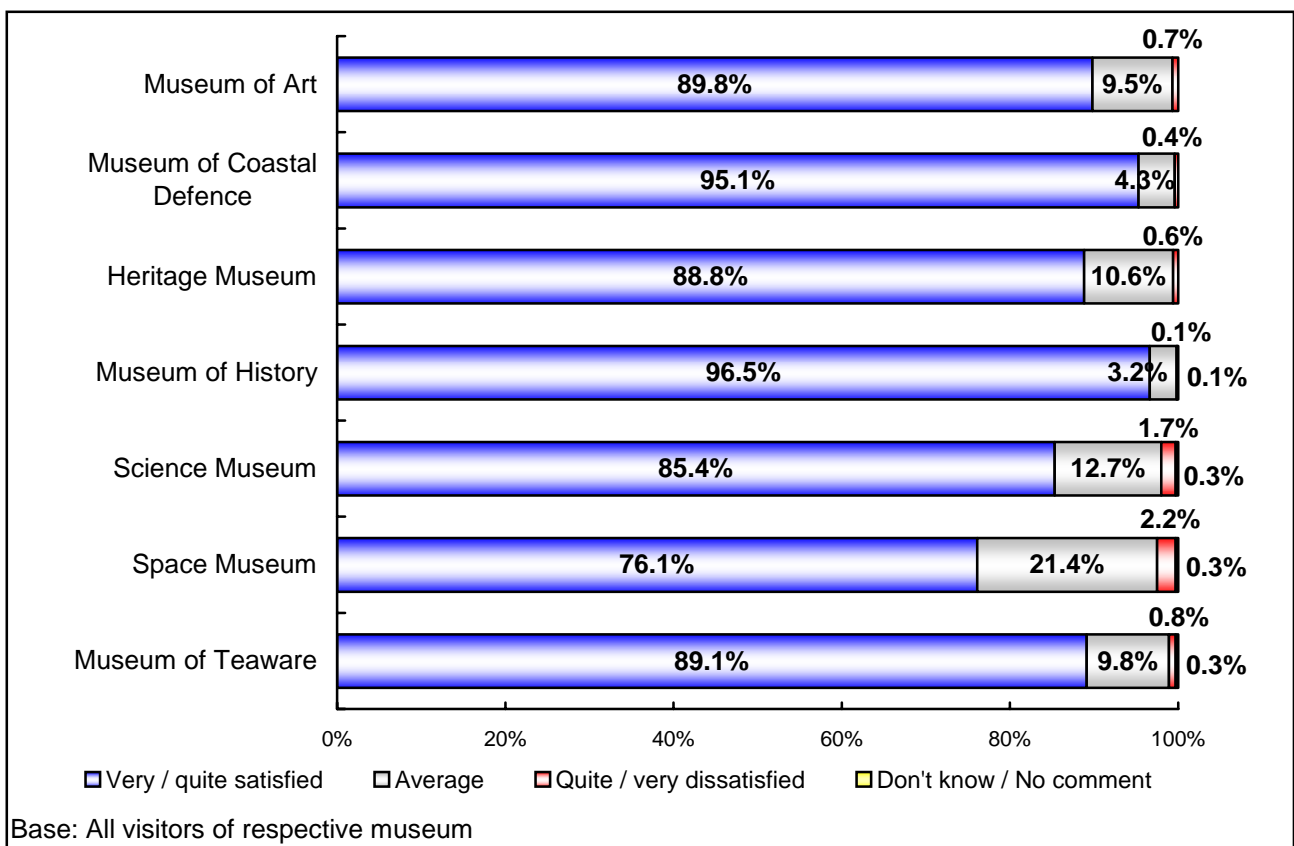
- Except for Science Museum where about half of the visitors (48.7%) were aware of its education and public programmes, the awareness levels of the education and public programmes for other museums were generally low (24.7% - 37.1%). While about one-tenth of the visitors (11.2%) of Science Museum claimed they had participated in its education and public programmes, the participation rate for other museums was very low with only about 2% - 6% of the visitors claimed they had participated in the programmes before.

**Awareness level and participation rate of education and public programmes
organized by the museums**



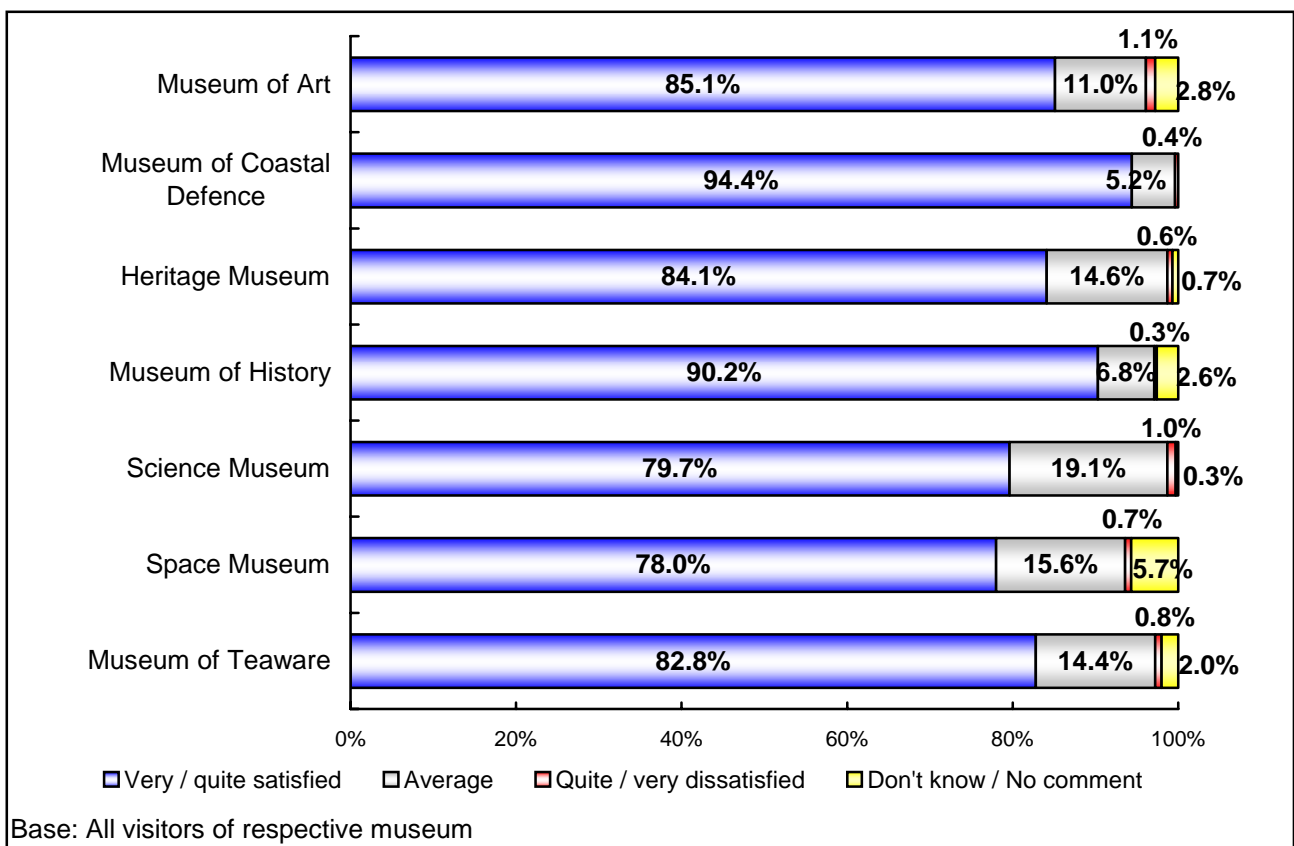
- Most of the visitors (more than 75%) were very / quite satisfied with the exhibitions of the museums, in particular for the Museum of Coastal Defence and Museum of History where 95.1% and 96.5% of the visitors considered the exhibitions of the museum satisfactory (very / quite satisfied). Only very few (less than 3%) of the visitors were very / quite dissatisfied with the exhibitions of the museums.

Overall satisfaction of the exhibitions of the museums



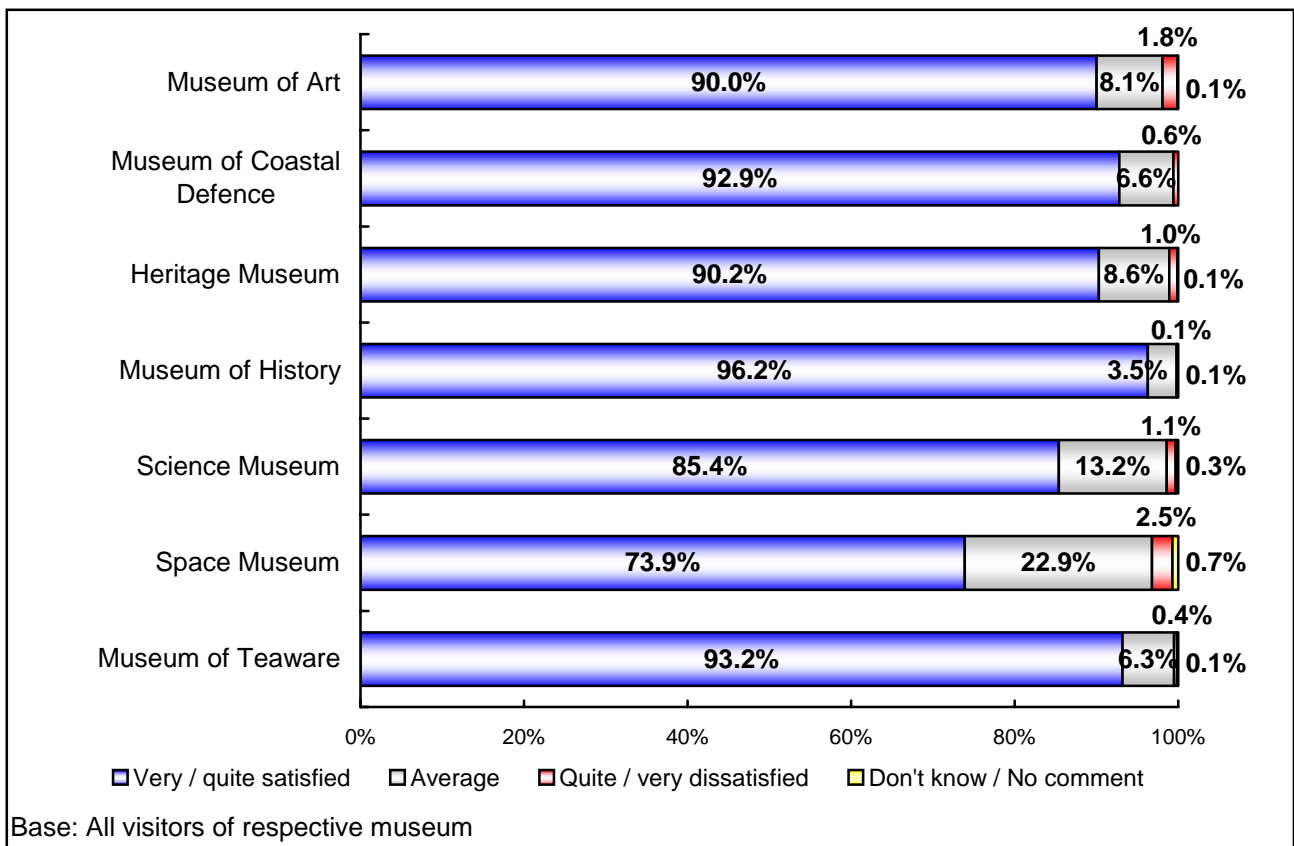
- Most of the visitors (more than 75%) considered the facilities of the museums satisfactory (very / quite satisfied), in particular for the Museum of Coastal Defence and Museum of History where 94.4% and 90.2% of the visitors were very / quite satisfied with the facilities of the museum. Only about 1% of visitors were very / quite dissatisfied with the facilities of the museums.

Evaluation of the facilities of the museums



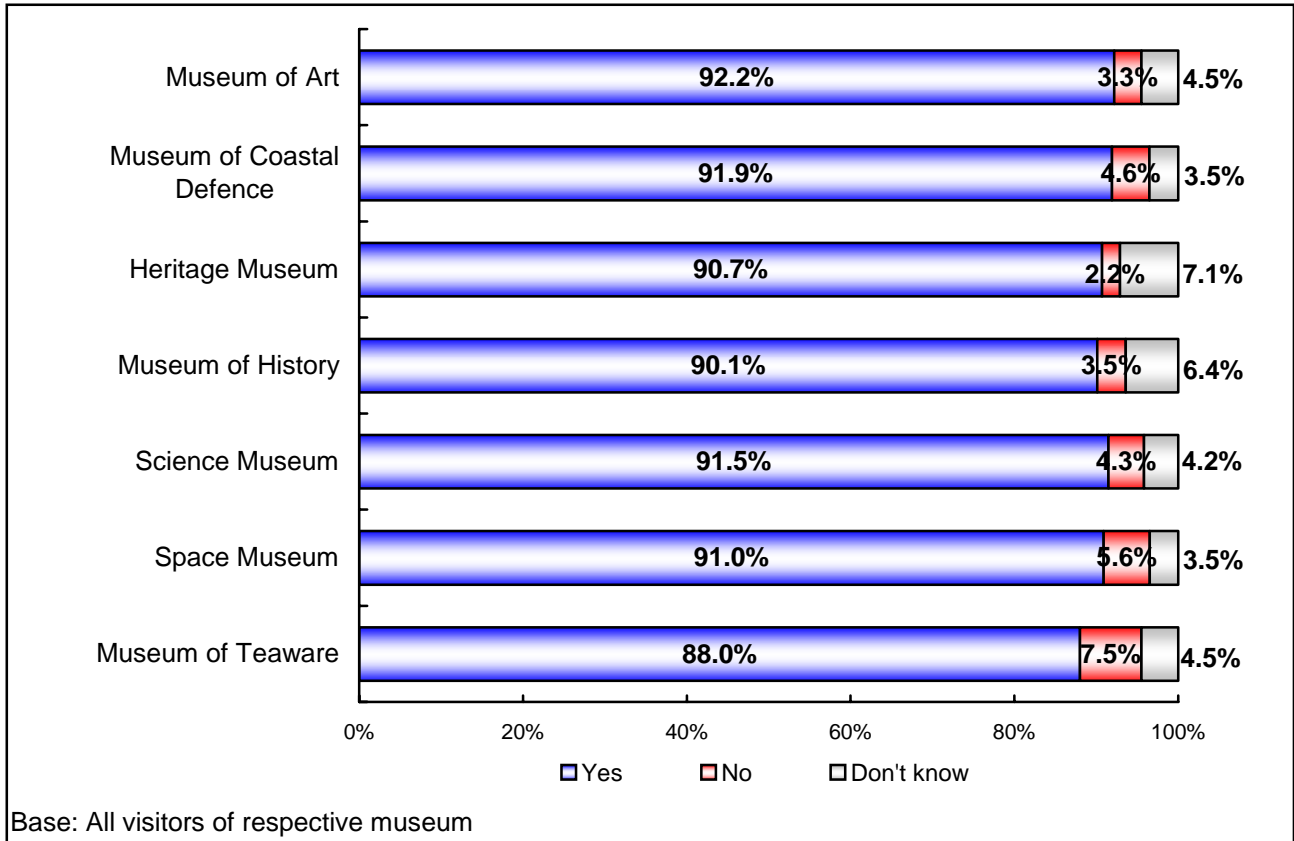
- The overall satisfaction of the museum was also very high. Except for the Science Museum and Space Museum, majority of the visitors (90% or more) were very / quite satisfied with the museum. As for the Science Museum and Space Museum, while 85.4% and 73.9% of the visitors were very / quite satisfied with the respective museum, the remaining of the visitors mostly considered the museum average and only very few visitors were very / quite dissatisfied.

Overall satisfaction of the museums



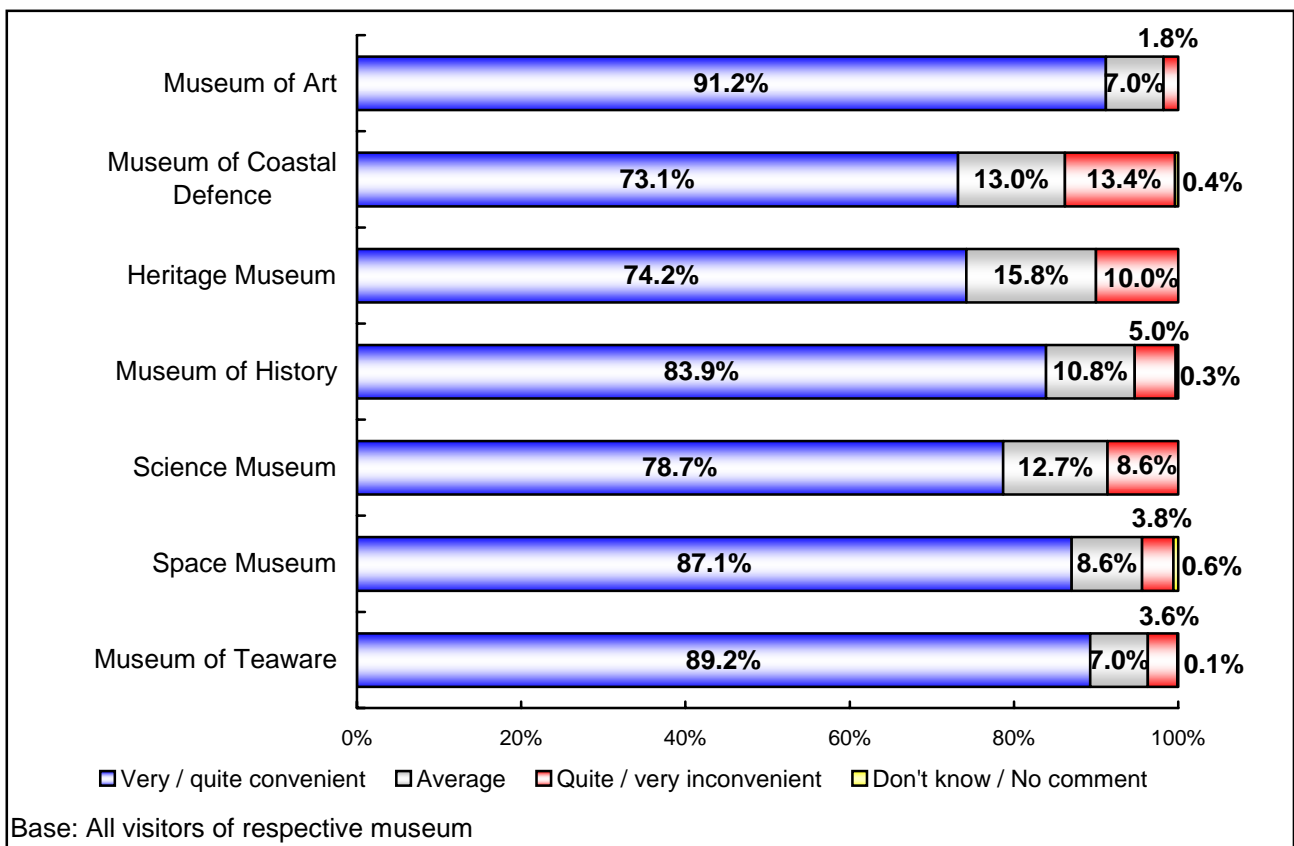
- Most of the visitors (85% or more) claimed they would visit the museum again, 2% - 8% indicated the opposite and 4% - 7% of the visitors declared “don’t know”.

Whether will visit the museum again



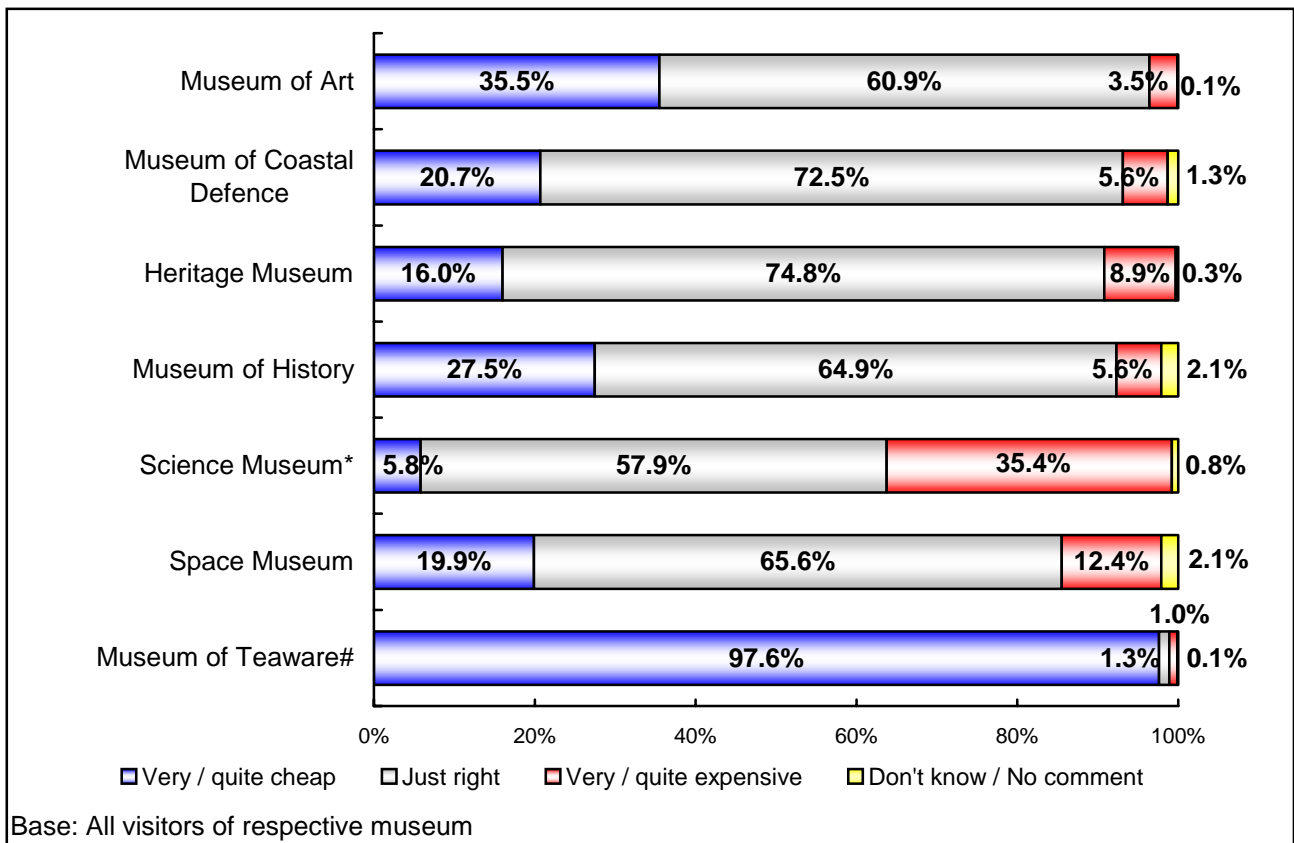
- While 80% or more of the visitors of Museum of Art, Museum of History, Space Museum and Museum of Teaware considered that it was very / quite convenient to travel to the museums, relatively less visitors of Science Museum (78.7%), Heritage Museum (74.2%) and Museum of Coastal Defence (73.1%) considered so. It is noteworthy that about one-tenth or more of the visitors of Museum of Coastal Defence (13.4%) and Heritage Museum (10.0%) considered that it was very / quite inconvenient to travel the museums.

Whether consider convenient to travel to museums



- On the evaluation of the standard admission fee of the museums, except for Science Museum where the admission fee is higher, more than 60.0% of the visitors of other museums considered the admission just right and the most of the remaining visitors considered the admission very / quite cheap. As for Science Museum, while 57.9% of the visitors considered the admission fee just right, it is noteworthy that 35.4% of the visitors considered the fee very / quite expensive. The vast majority of the visitors (97.6%) of Museum of Teaware considered the free admission as very / quite reasonable.

Evaluation of the standard admission fee



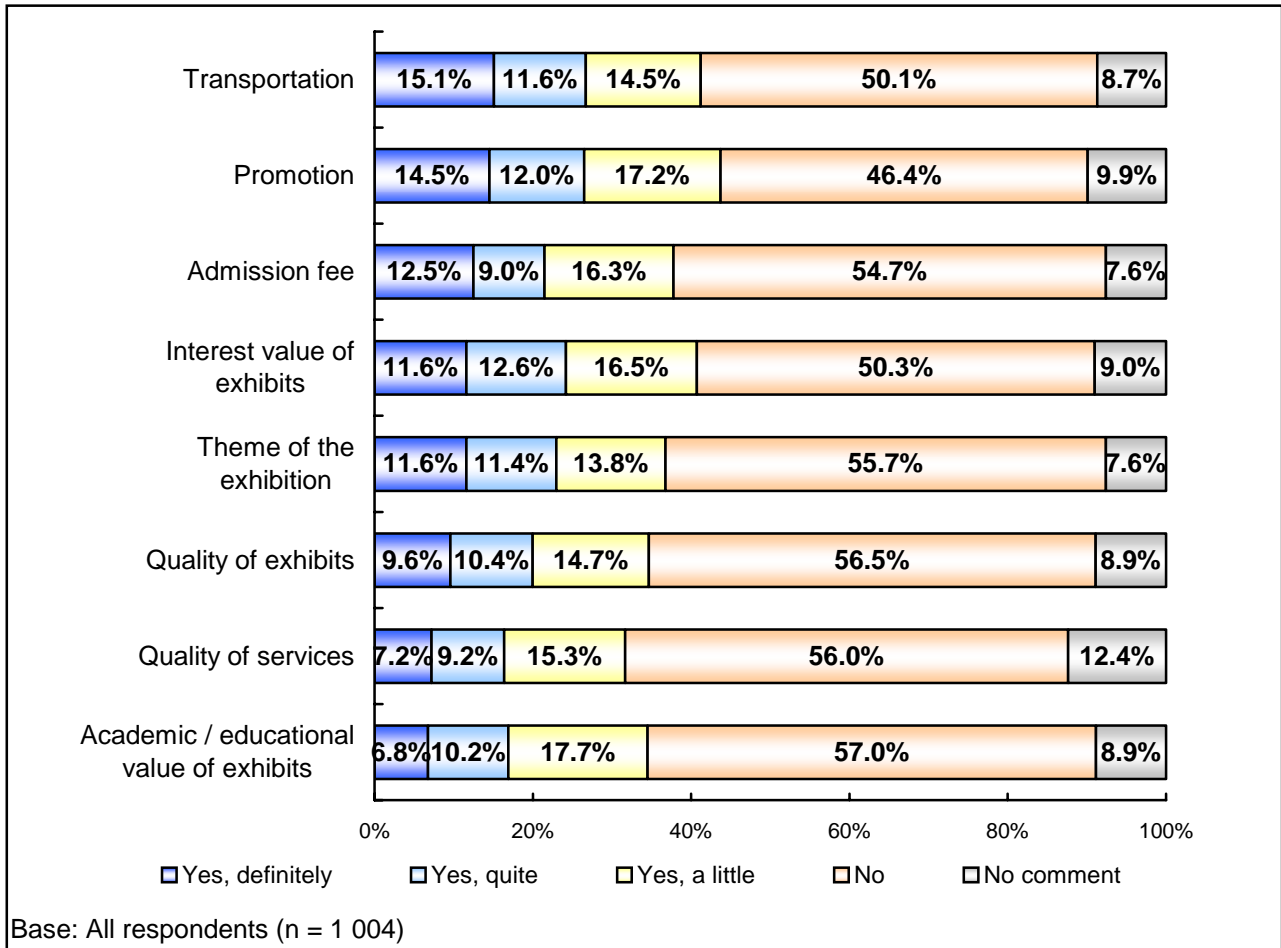
* The standard admission fee for Science Museum is \$25.

As Museum of Teaware does not charge the admission, therefore the question was asked if visitors found it reasonable for the free admission of the Museum.

Major Findings - Infrequent Visitors Group

- More than half of the infrequent visitors not visiting any of the seven museums in the past 4 years claimed the reason was “no time / too busy”, followed by “have no interest in the respective museum” and “have no interest in any museums at all”.
- Awareness level of the free admission of the museums under the management of LCSD on Wednesdays was quite low, only 21.7% of the infrequent visitors were aware of the free admission. Therefore, promotion on the free admission of the museum may be necessary to encourage infrequent visitors visiting the museums.
- Awareness level of the weekly, half-yearly and yearly passes of the museums was very low, only 5.6% of the infrequent visitors were aware of the passes whereas the majority of the infrequent visitors were not aware of any of the passes.
- Only 0.6% of the infrequent visitors had participated in the “Hong Kong International Museum Day Panorama”.
- In terms of the different factors that would affect infrequent visitors visiting the museums, it was observed that while about half or more of the infrequent visitors considered the different factors would not affect their decision of visit to the museums, more than one-tenth of the infrequent visitors considered the following factors would definitely affect their decision which included: “transportation” (15.1%), “promotion” (14.5%), “admission fee” (12.5%), “theme of the exhibition” (11.6%) and “interest value of exhibits” (11.6%).

Factors affecting the decision of visit to the museums



- Only 3.6% of the infrequent visitors had visited other museums in Hong Kong in the past 4 years. Among these infrequent visitors, 27.8% had visited the Hong Kong Railway Museum, followed by Sam Tung Uk Museum (25.0%) and Hong Kong Film Archive (25.0%).
- In terms of the types of exhibitions or exhibits that would attract infrequent visitors visiting the museums, 15.3% claimed they were interested in “history”, followed by “science / technology” (10.4%), “antiques” (9.1%) and “astronomy / space” (8.6%). Yet still about one-third of the infrequent visitors (33.8%) claimed they were not interested in any of the exhibitions or exhibits.

- Of the infrequent visitors who had interest in visiting the exhibitions, about one-third of them (33.1%) claimed they would not fix any day for visiting the exhibitions and about equal proportion would choose to visit the exhibition on Saturday or Sunday (19.2% and 20.6% respectively). In terms of the period of day that they would choose to visit the exhibitions, more than half of these infrequent visitors (52.0%) would choose the afternoon whereas 29.9% would not fix any period of day for their visit.
- About half of the infrequent visitors (50.5%) considered the publicity of the museums very / quite inadequate, only 15.6% considered the opposite and 16.2% considered average.
- In terms of the effective channels for the museums to promote their activities, 77.4% of the infrequent visitors considered TV as the most effective channel, followed by newspaper / magazine coverage (31.9%), radio (27.3%) and newspaper / magazine advertisements (21.7%).

**Number of Tourists in the 2004 Visitors' Survey
(for the period from 1 to 14 November 2004)**

Venue	No. of Visitors Interview	No. of Tourists		Tourist %
		Mainland Visitors	Other countries' Visitors	
Hong Kong Museum of Art	718	68	227	41.1%
Hong Kong Museum of Coastal Defence	716	36	68	14.5%
Hong Kong Heritage Museum	717	12	64	10.6%
Hong Kong Museum of History	717	24	98	17.0%
Hong Kong Science Museum	718	19	40	8.2%
Hong Kong Space Museum	719	73	109	25.3%
Flagstaff House Museum of Teaware	716	34	205	33.4%
Total	5,021	266	811	21.4%
		1,077		