



CHURCHILL WAR ROOMS

CHURCHILL AND THE MIDDLE EAST APPENDIX 3

AUDIENCES

Based on IWM's rolling programme of audience research, the key target audiences for the *Churchill and the Middle East* are:

Time Teamers – 53% of Churchill War Room's audience in 2015-16

- Driven to visit by their love of history, heritage and personal stories – they are 'history lovers'
- "Empathy" and "Authority" are the brand values that resonate with this audience. They are looking for meaningful, relatable exhibition content that strikes a chord with them personally. However, they also have a deeper understanding of history than other audiences, so are looking to IWM to deliver an authoritative, informed narrative of historical events.
- Time Teamers list their main reasons for visiting CWR as "It is a must see site" (35%) and "To have the subject matter here brought to life" (17%) – experiencing history 'in situ' is a core driver for this audience.
- Very likely to be an overseas audience (68%) – especially North American. As a result, they are almost certainly on their first visit (92%).
- Despite being a very intellectually-engaged audience, the high percentage of overseas tourists in this audience mean they do not spend long on site, as they are likely to be fitting several attractions into their schedule for the day. The average Time Teamer will spend 2 hours on site, so are likely to pick and choose which exhibitions they see.
- They have relatively low expectations for their visit (only 19% expect CWR to be 'Excellent') but it takes a lot to impress them because they are already well-informed on our subject matter.
- Despite this, Time Teamers have the highest visitor satisfaction of any audience segment – 45% give their visit a score of 10/10. They are also the most likely audience to recommend their visit to a friend or relative (58% are extremely likely to recommend (10/10)).

Culture Vultures – 12% of Churchill War Room's audience in 2015-16

- Culture Vultures are CWR's core UK audience, and one that we are looking to increase
- This audience are 'Culture Lovers' – they are driven to visit by a passion for arts and an interest in different cultures. While a love of history is not a motivational driver for them, they are interested in how historical events have shaped the society we live in today, and are intrigued to see how political and socio-economic events have an effect on the cultural landscape. In the context of this exhibition, this audience would be drawn to content that highlights the similarities and differences between European and Middle Eastern culture and society during Churchill's lifetime. 21% say their main motivation to visit is to "learn about the subject of the attraction".
- "Relevance" is the brand value that resonates most with Culture Vultures – they are liberal and well-educated, and want to understand how world events both past and present have come to influence culture today, both at home and abroad. While their knowledge of IWM's subject matter is limited, they want to see how our exhibition content speaks to their own lives and their own experiences.

- 85% of Culture Vultures are on their first visit which, while still high, is low compared to other audiences.
- They are an older audience than Culture Vultures tend to be (both within the UK marketplace and at other IWM branches) – 74% of Culture Vultures at CWR are visiting with someone aged 50+ (Culture Vultures tend to be 25-40). This is far higher than Classically Cultured who are usually the older cultural audience.
- They have one of the highest visitor expectations – 25% expect CWR to be excellent – but CWR does live up to these expectations: 61% said their visit was “much better than expected”