AUD Module Instructors

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Agenda Overview

SCHEDULE
Morning
• Welcome & Introductions
• AUD Module Overview
• Why This is Important
• Understanding Your Visitors
• Marketing Basics
• Visitor Studies Basics
• Evaluation Basics
• Wrap-Up & Assignments
• Mentor Group Break-outs

Afternoon
• Marketing Basics
• Visitor Studies Basics
• Evaluation Basics
• Wrap-Up & Assignments
• Mentor Group Break-outs

GOALS FOR TODAY
Ways of understanding and connecting with your audience
• How to collect visitor information and locate demographic research and overall trends
• How to use that information to make your organization more relevant to your visitors and communities
• Key marketing concepts and strategies for promoting your museum
• Clarity on organizational next steps in this topic area

GROUND RULES
• Responsible for your own learning
• Respect confidentiality
• Honor time limits
• Cell phones – be cool
• Typos are okay
Introduction to Audience (AUD)

This module covers:
- Marketing & public relations
- Audience & visitor research
- Community relations
- Visitor services

Refer to page 77 of your StEPs Workbook

Survey Says

A survey of Utah museums in February 2018 elicited these topic priorities for this module.

1) Audience and visitor research (identifying current and potential audiences and decisions on how to serve them)
2) Marketing and PR (regularly promotes institution and thinks strategically on how it shares information) [tied for 2nd place in survey]
3) Community relations (thinks about how to provide public physical and intellectual access to the institution and its resources) [tied for 2nd place in survey]
4) Visitor services (providing high level of basic visitor services)
AUD Module Schedule

March 25, 2019  
Full-day Workshop | Audience: An Introduction

April 29, 2019  
Half-day Skills Lab | Building a Marketing Plan

May 2019 (date to be negotiated with Mentor)  
Mentor Site Visits | Work on Your Individual Projects

June 24, 2019  
Full-Day Workshop | Building Relationships
(community relations, new audiences, guest services, visitor experiences, etc.)

Defining Terms

Who are your...  
- Audience?  
- Visitors?  
- Community?  
- Relationships?

What is...  
- Visitor Studies?  
- Audience Evaluation?  
- Program Evaluation?  
- Marketing?

AUD Standard 1

The institution identifies current and potential audiences it serves, and makes appropriate decisions in how it serves them.

A. Does the institution actively collect information about current and potential visitors?

B. Does the institution regularly evaluate its activities?
AUD Standard 2
Regardless of its self-identified communities, the institution strives to be a good neighbor in its geographic area.
A. Does the institution know its neighbors?
B. Does the institution respond to demographic, economic, social, & political changes in the community & region?
C. Does the institution work with other groups in the community?
D. Does the institution allocate resources to serve the community and enhance quality of life?

AUD Standard 3
The institution demonstrates a commitment to providing the public with physical and intellectual access to the institution and its resources.
A. Does the institution regularly offer the public a variety of opportunities for physical and intellectual access (e.g., tours, events, programs, publications, website)?
B. Does the institution actively promote its activities and resources to the public?

AUD Standard 4
The institution regularly promotes the institution and its activities and thinks strategically about how it shares information.
A. Does the institution regularly promote its activities through a variety of methods (e.g., newsletter, press release, website, brochure, media)?
B. Do the institution’s promotional materials communicate a consistent institutional identity?
C. Is there a written plan for promoting the institution?
AUD Standard 5
The institution is committed to providing a high level of basic visitor services and makes continued improvements in the delivery of those services.

A. Can visitors easily navigate to and around the institution?
B. Are basic amenities such as restrooms, water, and seating available to visitors?
C. Do paid and unpaid staff receive customer service and hospitality training?
D. Does the institution meet the needs of visitors with physical and mental disabilities?

AUD Unacceptable Practices
Unacceptable practices that are unethical and in some cases illegal:

- Avoidance of, or resistance to, participation in museum activities by any person based on race, ethnicity, social status, gender, ability, or sexual orientation.
- Prejudicial interpretation of visitor assessments.

What THIS Workshop Covers
- Importance of Connecting to Visitors
- Understanding Your Visitors
- Marketing Basics
- Visitor Studies Basics
- Evaluation Basics
WHY CONNECTING TO AUDIENCE MATTERS

OF/BY/FOR ALL | Video

NINA SIMON
Executive Director, Santa Cruz Museum of Art & History
✓ Author, The Participatory Museum (2010)
✓ Author, The Art of Relevance (2016)
✓ Blogger, Museum 2.0, museumtwo.blogspot.com
✓ @ninaksimon
✓ #ofbyforall

OF/BY/FOR ALL Framework
Video Introduction [37 mins]
Museum Next Conference, London, 2018

OF/BY/FOR ALL | Discussion

1) What do you think?
2) What are Simon’s primary messages?
3) How can your organization become of by and for your community?
4) What are YOU willing to change to get new people to your museum?

Free self-assessment at
https://www.ofbyforall.org/assess-now
UNDERSTANDING YOUR VISITORS

Ways of Thinking About Your Visitors

What do you know about your visitors & how do you know it?

Demographics
- Age
- Gender
- Race
- Marital status
- Children #
- Occupation
- Annual income
- Education level

Psychographics
- Motivations
- Attitudes
- Behaviors
Falk’s Visitor Identities

1) Explorers
2) Facilitators
3) Experience Seekers
4) Professionals/Hobbyists
5) Rechargers

Explorers
Want to learn new information & understand new concepts

Facilitators
Want to ensure that their companions meet their visit goals
Experience Seekers
Want to see the most renowned pieces & make memories

Professionals / Hobbyists
Want to see & study specific pieces or exhibits

Rechargers
Want to relax in a peaceful atmosphere
HANDS-ON ACTIVITY #1
IDENTITY RELATED MOTIVATIONS

1) Break into SIX small groups (pairs or trios – museum teams split up if possible).
2) Read the museum visitor interview provided. Determine which identity the interviewee represents. Underline parts of the text that tell you that. (10 minutes)
3) Briefly share with the larger group who your visitor is and a few key parts of the interview that help you understand his or her identity. (10 minutes)

Later on your own, think about:

☑️ In what ways do you think your museum serves these identities well?
☑️ How do your mission and strategic plans reflect/recognize these different types?

LUNCH BREAK – 60 minutes

MARKETING: MAKING THE CONNECTION
Marketing Basics

- What Is Marketing?
- Why Does It Matter?
- Identifying Your Audience
- Telling Your Story

What Is Marketing?

MARKETING = connecting your mission with your visitors’ wants and needs

- Communicating effectively
  - selling
  - persuading
- Building mutually beneficial relationships

Why Does It Matter?

- Encourages attendance
- Generates income and supports fundraising
- Raises awareness
- Promotes status, brand, and reputation
- Supports and builds relationships
- Generates positive word of mouth
Effective Marketing Involves

Looking Inward — Internal Awareness & Alignment

- Help everyone in the museum understand their role in maintaining positive relations with public and stakeholders

Effective Marketing Involves

Looking Outward — Market & Audience Awareness & Alignment

- Be aware of the marketplace and your competition
- Ask visitors what they want and then “deliver the experience”
- Build relationships with other museums, organizations, schools, and universities
- Build relationships with the media
- Communicate regularly and consistently so that messages stick
- Be open to ideas, inspiration, creativity — good ideas come from everyone — and allow for mistakes

5Ps—Elements of the Marketing Mix

- Product
  - Product variety
  - exhibitions
  - programs
  - retail
  - Quality
  - Design
  - Features
  - Brand name

- Place
  - Channels
  - Locations
  - Transport
  - Inventory
  - Internet

- Price
  - Admission Fees
  - Membership Fees
  - Discounts
  - Allowances

- People
  - Board Managers
  - Staff
  - Hierarchies
  - Teams

- Promotion
  - Advertising
  - Public Relations
  - Direct Marketing
  - E-Communications
  - Exhibition Promotions
  - Tour Promotions
What Should You Promote?

Specific exhibitions and programs?
Institution’s value as a whole?

Promoting Exhibitions and Programs
- Gets “butts in seats”
- Easier to measure
- Limited potential for growing new audiences
Promoting the Institution

- Not easy to measure
- Sustained effort & longer timeline to see results
- Can have considerably broader impact

Identifying Your Audience

- Who’s coming to your museum (and who isn’t)?
  - Visitor log, Staff insight, Surveys
- How well does your audience represent your community?
  - University of Utah’s Kern C. Gardner Policy Institute has census and own data about demographics of Utah.
  - [https://gardner.utah.edu/demographics/](https://gardner.utah.edu/demographics/)
- Who else might come?
  - Those who “almost come” vs. those “who will never come”
  - Who lives and works nearby?
  - Who visits your website & follows you on social media?
  - Identify affinity groups.
  - Identify lookalikes.

Segmenting Your Audience

- Values and beliefs
- Cultural participation
- Leisure activity
- Media habits
Telling Your Story

Do you have a clear, consistent, and compelling message about:

- what you have
- who you are
- what you offer

What Is Your Brand Identity?

Brand = Institutional Identity

- Your museum’s public face
- The images, words, and feelings you want people to think of when they think of your museum

Why Does It Matter?

- Creates / heightens visibility (awareness)
- Creates / heightens attention (mind share)
- Develops loyalty

Effective Brand Messaging

- Demonstrates the museum’s unique value
- Is distinct from competitors
- Is recognizable and consistent
- Promotes trust, reliability, and quality
- Is positively internalized in the minds of visitors
Creating a Brand Message

Questions to Ask

▪ What does your museum do?
▪ What do you do better than or more uniquely than any other museum or cultural institution in your community?
▪ Why should someone visit your museum?
▪ What kinds of experiences can they expect to have?

HANDS-ON ACTIVITY #2

BRAND STATEMENT: ORGANIZATION ANALYSIS

1) Divide into pairs with someone on your museum team.
2) Answer the first seven questions on your sheet as they relate to your museum. Note any disagreements or areas of uncertainty (15 minutes).
3) Reconvene as large group to share out answers (15 minutes).
4) Focus on identifying what resonates (and doesn’t) with:
   ✔ members of museum teams
   ✔ other STEPs participants

AFTERNOON BREAK – 15 minutes
IN LIEU OF MINDREADING:
VISITOR STUDIES & EVALUATION

If we could read minds, we would know exactly what exhibits to show next year, what programs should accompany them, and how much text on a label is too much, too little, or just right. We could know what hours to be open so that the most people would come. We would understand what topics appeal to teenagers, moms with young children, fathers who work the swing shift, and visitors from out of town.

Unfortunately, we cannot read minds. We can best determine the contents of the hearts and minds of those people who choose to visit us — and, if we make the effort to find them, those who do not — by conducting visitor studies and evaluations.

If we ask our visitors what they think about what we do, and sometimes if we watch them use our museum, we can find some clues that will help us make good choices about exhibit topics, program formats, museum hours, and more.

--- The Small Museum Toolkit. Book 4, Reaching and Responding to the Audience

Visitor Studies

- Interdisciplinary study of human experiences within informal learning environments.
- Systematic collection and analysis of information to inform decisions about interpretive exhibits and programs.
- Follows rigorous research methods that adhere to social sciences standards.
- Designed to improve the practices of learning in informal environments.

Source: https://www.visitorstudies.org/glossary-of-terms
Visitor Studies | A Case Study

1) What questions did they want to answer?
2) How did they collect the information?
3) How did they organize the information?
4) How did they use the information to make decisions?

How can you see this being applied in your museum?
Do you have similar questions?

Evaluation

Judging merit or worth of a program or exhibit through systematic collection of information about it.

- Requires planning to determine purpose of evaluation, type of information needed, who has that information, how it should be gathered, and the resources available to do it.
- Quantitative (butts in seats) vs. Qualitative (learning outcomes or impact)
  - What is evaluated should be tied to project goals and objectives.
  - Not just "summative" – done at every stage to inform the process.

STAGES OF EVALUATION

<table>
<thead>
<tr>
<th>Stage</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Front-end Evaluation</td>
<td>Would people be interested in this? What do people know about the topic?</td>
</tr>
<tr>
<td></td>
<td>What misconceptions do people have? What do people want to know?</td>
</tr>
<tr>
<td></td>
<td>Is it on mission?</td>
</tr>
<tr>
<td>Formative Evaluation</td>
<td>What is working for the users/visitors?</td>
</tr>
<tr>
<td></td>
<td>What is not working and needs to be improved?</td>
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<tr>
<td></td>
<td>Do visitors get what the project is presenting?</td>
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<tr>
<td></td>
<td>Do visitors like the presentation?</td>
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<tr>
<td></td>
<td>How do visitors use/not use the project?</td>
</tr>
<tr>
<td>Summative Evaluation</td>
<td>How well do people understand the main ideas of the project?</td>
</tr>
<tr>
<td></td>
<td>Did it support our mission?</td>
</tr>
<tr>
<td></td>
<td>Did it reach the audience we had hoped it would?</td>
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</tbody>
</table>
HANDS-ON ACTIVITY #3
EVALUATION PLANNING

1) Complete Part 1 (Focus Your Evaluation) with your museum team members (15 minutes).
2) Complete Part 2 (Make a Plan) with your museum team members (10 minutes).
3) Later, after the workshop, complete Parts 3 (Collect Data) and 4 (Analyze & Interpret Data)

Evaluation Focus & Planning
What is Your Focus?
- Program goals
  - SMART goals
- What success looks like
- Purpose of the evaluation
- Questions to be answered

Planning Nuts & Bolts
- What?
- Who?
- How?
- Where?
- When?

Data Collection Methods
- Document Review
  Reviewing records you have on hand
- Observations
  Unobtrusively watching how visitors use exhibits
- Interviews
  Talking to visitors about their experience
- Surveys
  Asking questions, usually on paper
- Pilot Testing / Prototyping Ideas
  Creating a mock-up and getting visitor feedback
Observations

- Sketch a map of your gallery and identify discrete exhibit elements.
- Decide what behaviors you want to watch for.
- In a small gallery, or a large one with good sight lines, sit in a particular spot and record data from there. Otherwise, unobtrusively follow visitors.
- Other possibilities:
  ✓ Security camera footage
  ✓ Visitors self-tracking

Track Visitors

- Track visitor travel paths using lines and arrows.
- Mark an X where they stop, with your code of behavior.
- Collate into spreadsheet to determine how many stops are made at each exhibit, and how often behaviors are seen at them.

With this data, think about:

- Why numbers may be high or low (exhibit lost in a corner? upstaged somehow?)
- Which exhibits are really engaging?
- What qualities do you think make them that way?

Surveys

1. Define a clear, attainable goal for your survey
2. Keep more personal questions to the end
3. Don’t let your survey get too long
4. Focus on using closed-end questions
5. Consider offering incentives
6. Don’t ask leading questions
7. Keep answer choices balanced
8. Absolutes can hurt the quality of responses
9. Avoid “double-barrelled” questions
10. Preview your survey before you send it

HANDS-ON ACTIVITY #4
AUDIENCE SURVEY CRITIQUE

1) Divide into pairs.
2) Determine the problems with each question on this survey.
3) Propose a solution to each problem.

HANDOUT | Thinking Evaluatively: A Practical Guide to Integrating the Visitor Voice, AASLH Technical Leaflet #238
HANDOUT | How to Conduct Audience Research, Museums & Galleries NSW
HANDOUT | Survey Examples:
- Audience – Institutional Exit Survey
- Audience – Exhibit or Public Program
- Internal Audience – Exhibit Critique

PUTTING IT ALL TOGETHER

Organizing Your Data
- Enter your data into a spreadsheet
- Use formulas to tally quantitative info (numbers)
- Use categories to sort qualitative info (words)

Analyzing Your Data
- Revisit your evaluation questions.
- What answers do the data provide?

WHAT CAN YOU DO WITH Google?

Spreadsheet # 1 | Quantitative Data
WRAP UP

Quick Recap

What We Have Covered Today:
- Importance of Connecting to Visitors
- Understanding Your Visitors
- Marketing Basics
- Visitor Studies Basics
- Evaluation Basics
Recommended AUD Resources

American Alliance of Museums (AAM), Marketing and Public Relations Resources
https://www.aam-us.org/programs/resource-library/marketing-and-public-relations-resources/


Visitor Studies Association https://www.visitorstudies.org

Kem C. Gardner Policy Institute, Demographic Data https://gardner.utah.edu/demographics/


YOUR ASSIGNMENT

1) Complete the free, confidential OF/BY/FOR ALL organizational self-assessment (10 minutes) to help identify your strengths and weaknesses in being OF, BY, and FOR your community. They will send you a report.
https://www.ofbyforall.org/assess-now

2) Develop your Brand Statement Organizational Analysis as first step to building a marketing plan by asking a museum insider (staffer not here today) and a museum outsider (visitor or friend) to complete questionnaire (Hands-on Activity #2).

3) Prepare to report out on these both in Month 4.

4) Based on your self-assessment, work with your Mentor to implement at least one additional project for this module.

Possible Projects for AUD

- Visitor guestbook. Log to track daily visitation totals, names & types of groups that visit, special event counts, etc., to identify trends.
- Survey questionnaire for general visitors and/or program participants.
- Experiment with new types of data collection about audience.
- Report detailing how the institution interacts with the community it serves.
- Communications audit.
- Media policy.
- Updated institutional logo, letterhead, and other materials.
- Institutional website or update of existing website.
- Marketing plan.
- Policy on customer service expectations for paid and unpaid staff.
- Review of interior signage, directional signage along roadways.
- Review of interior and exterior visitor amenities, noting ADA requirements.
- Review of interior and exterior lighting.
- Building and grounds maintenance and cleaning schedule.
Wrap-Up

- **STEPS-UT is a partnership** between the Utah Division of Arts & Museums, Utah Humanities, and Utah Division of State History, and is supported by funding from the Utah Department of Heritage & Arts, the State of Utah, and the National Endowment for the Humanities.

- Questions? Anything else? Nametags to the basket please.

- **Mentor & Mentee Break-out Groups until 5pm.**

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