

## Thinking Evaluatively: A Practical Guide to Integrating the Visitor Voice

By Jill Stein, Marianna Adams, and Jessica Luke

**T**he history museum field is facing critical concerns: declining attendance, financial difficulties, and general uncertainty about sustainability. Yet this is also a time of tremendous opportunity, with increasing use of digital communication, expanding interest in free-choice learning, and people's trust in history museums as sources of information about the past. One proven strategy that can both maximize these opportunities and address critical concerns is better understanding visitor needs, expectations, and motivations. Integrating the visitor perspective into all stages of planning, development, and implementation is what we call "evaluatively thinking," and it is more important now than ever.

Thinking evaluatively means walking a mile in the shoes of our visitors in order to understand and respond to their needs, perceptions, and experiences. The visitor experience is not simply an outcome to be considered only at the completion of an exhibition or program; it should be a guiding thread interwoven through all stages of development. Although evaluation has played an increasingly significant role in museums over the past decade, much work still needs to be done to integrate evaluative thinking into organizational culture and practice.

What follows is a guide to the basic principles and practices of evaluation, along with a set of useful strategies for involving your institution in thinking evaluatively.

## WHAT IS EVALUATION?

The basic process of evaluating is a natural human endeavor. We observe, reflect, note what is not working, and adjust our actions accordingly. These natural, adaptive human activities are not the same as evaluation but do form a basis for it. When the reflective process is expanded and made systematic, it then moves into the realm of evaluation.

Author Michael Quinn Patton notes that evaluation in its most basic sense is “any effort to...enhance human effectiveness through systematic data-based inquiry.” While many people still believe that the goal of evaluation is to determine the quality of your work—whether good or bad (see “Five Common Misconceptions about Evaluation”)—evaluation is as much a way of thinking as it is a product or finding.<sup>1</sup>

Evaluation is also much more effective when thought of as a collaborative process. It is not something to be done *to* people or programs, but rather a process that enables museum staff to be more aware and effective in their work. Evaluation can then be highly satisfying for all involved, helping us clarify goals, be more focused in our work, and accomplish our objectives.

## WHY DO EVALUATION?

Many museum professionals agree that evaluating exhibitions and programs is a good idea. It is intuitive that getting feedback from visitors and other stakeholders will contribute to the success of a particular project. However, these reasons are not often clearly articulated or the purpose of evaluation is viewed too narrowly, such as simply to rate a program as “successful” or not. In fact, there are many benefits to conducting evaluation that are not often emphasized or well understood. Becoming aware of these benefits can encourage more involvement and buy-in from staff and board members, to support evaluative thinking throughout your institution.

### *Evaluation helps you define goals.*

Before beginning any evaluation effort, it is essential to define goals and outcomes. Only then do you have something to measure. Too many museum exhibitions and programs fail to identify their outcomes and measures of success. For example, goals and objectives are often simply intuitive rather than articulated; defined and written down without seeking consensus; or too broad, unrealistic, and/or not measurable. Consequently, staff often tries to implement the project without a clear sense of focus, which naturally poses challenges in conveying specific messages or creating appropriate experiences for visitors. Evaluation supports museum staff in collectively thinking about and articulating what would constitute the success of a project. Staff tend to become more focused, move beyond personal agendas, and concentrate on the quality

of the visitor experience. As a result, the project has a much greater chance of being more effective.

An evaluation conducted at the Maryland Historical Society on their *History Explorers* Program, for example, revealed a discrepancy between how project team members perceived the goals of the program and how they articulated those goals in the initial grant, as the project had changed over time. In order to get a more realistic and shared view of current goals, researchers conducted focus groups with staff and participating teachers. The organization was then better able to agree upon and articulate the key elements of the program, and evaluators could clearly focus on what to measure.<sup>2</sup>

### *Evaluation can save time and money.*

Many institutions avoid evaluation because they feel it requires too much time and/or money. This is often a result of thinking short- rather than long-term. For example, detecting problems early in the planning allows changes to occur before an exhibition is fabricated, copies of a curriculum are printed, or a new docent training model is implemented. There are also multiple ways of conducting small, low-budget evaluative projects in-house (see “Do It Yourself: Six Simple, Inexpensive Evaluation Activities”).

A few years ago, the San Diego Natural History Museum was planning to add computer terminals throughout an exhibition, assuming that computer interactives were most desirable for many visitors, especially children and teens. However, after conducting dozens of focus groups with a variety of audiences (including children), researchers discovered this was not true. Audiences actually preferred other ways of getting information, such as live interpretation, videos, manipulatives, objects, and immersive experiences—all much less expensive to implement.<sup>3</sup>

### *Evaluation can help leverage funding and support for projects.*

Many funders now require evaluation as part of the granting process, and many more are moving in that direction. Boards want to know what the institution is really accomplishing, and funders want to know what impact their money is having. They increasingly want clear and systematic documentation that the institution’s programming efforts are positively impacting visitors. Institutions are increasingly tasked with presenting convincing evidence that their efforts are effective. All sizes of institutions need to know the basics of evaluation to compete for funds in this era of accountability.

### *Evaluation can enhance staff communication and curiosity.*

Staff involvement in an evaluation project is an excellent professional development strategy. When

## FIVE COMMON MISCONCEPTIONS ABOUT EVALUATION

In order to better understand what evaluation is, it is equally important to clarify what it is *not*. Following are five of the most common misconceptions about evaluation:

- 1 **Evaluation is something you do at the end of a project.** Evaluation is most useful when it is incorporated into all stages of a project—allowing useful changes at any point in project development. Seeing it as the final grade of a project limits the true value of evaluation.
- 2 **Evaluation is a written survey.** A written survey is only one technique for gathering information. Other tools include interviews, discussions, focus groups, observations, and timed tracking of visitor behavior.
- 3 **Evaluation is about finding fault with something or someone.** Evaluation can be as much about finding out what works as what does not work. Evaluation does not lay blame, but rather helps project teams define their goals and objectives, create effective implementation, and shift directions based on visitor feedback.
- 4 **Evaluation won't tell me anything I don't already know.** While staff may have hunches about what's working and what's not, evaluation offers valid evidence and insights. When staff rely solely on assumptions, they may be puzzled and disappointed by visitor reactions.
- 5 **To be valuable, evaluation projects need to be BIG (and expensive).** Large, complex evaluation projects are not necessarily better than smaller, focused projects. When implementing evaluative thinking, start small. Once evaluation becomes a habit, it can expand according to need.

staff members are asked to think carefully about the desired outcomes of a project, they must come to consensus about those goals. The very act of working through the issues involved in designing and conducting an evaluation establishes an intellectually-stimulating environment whereby staff can view their work and the visitors from a variety of perspectives.

### *Evaluation can increase the institution's responsiveness to the community.*

Implementing a process of evaluative thinking requires staff to step back from their work and begin to see the museum experience from the visitor's viewpoint. This may mean that a strongly-held belief about visitors or long-running programs will have to shift when the program no longer meets visitor needs. Museum staff do not have to sacrifice responsibility for selecting and interpreting content, or upholding quality, but they will have to think more deeply about how visitors approach and understand that content. In sum, evaluation can empower staff to design the richest and most accessible experiences for their visitors.

### *Evaluation can be a stimulus for change and growth.*

Evaluation is a political process that can affect change and enhance institutional growth. If an institutional environment consistently supports evaluative thinking, then projects will begin to align themselves more closely to the institutional mission. Any disconnect between mission and action will be more glaring in light of focused, systematic evaluation. It can help an institution push the edge of their thinking and move out of repetitive, sometimes defeating, practices.

One example from the living history field is the *Opening Doors Visitor Engagement* initiative implemented at Connor Prairie. Based on extensive visitor research that used audio and video recordings of visitor experiences with interpreters, staff discovered that visitors were not absorbing educational messages and were not having the quality experience essential to the museum's mission. This research launched a major overhaul of institutional culture, practices, and interpreter strategies, including developing conversations based on visitor interests rather than following a standard script or monologue.<sup>4</sup>

## WHEN SHOULD YOU DO EVALUATION?

For many years, museums conducted evaluation only upon completion of an exhibition or program (if at all), and generally focused on the question, "Did we do a good job?" Recently it has become more common practice to incorporate evaluation throughout all stages of a project, asking multiple types of questions along the way—What do visitors already know about this topic? What will motivate them to attend the exhibition or program? What are their expectations for the experience? What types of personal and social learning may occur?

To answer your most important questions, think strategically about the most useful stages in which to conduct evaluation and what you need to know at each juncture. Evaluation is generally divided into three main stages: 1) **Front-End** – The planning and conceptual design phase; 2) **Formative** – When the program or exhibition is up and running; and 3) **Summative** – Near the end or after the program or exhibition is over.

### *Front-End Evaluation*

Studies that begin in the earliest stages of developing an exhibition or program are often called front-end evaluation. This stage can be thought of as the start of a continuing conversation among museum staff, designers/advisors, visitors, and the subject matter itself. Evaluation at this point occurs after the broad concepts and goals of a project are established but before much time or money has been invested in expanding the concepts into an actual program or

exhibition. These studies are exploratory in nature and typically seek information about visitor interests, expectations, and understanding of proposed topics.

## *Formative Evaluation*

The purpose of formative evaluation is to assess ongoing project activities at several points in time to provide feedback for program improvement. Formative evaluation takes place while an exhibition or program is still being planned or during the early stages of implementation. The results of such studies are intended to offer direct, concrete, and practical ways to improve a project. Staff can make informed decisions about project development in order to better meet the needs of visitors and achieve the goals of the project and/or institution. During formative evaluation, researchers are often focused on how visitors are using a program or exhibition, how they behave (e.g., social interaction, time spent, quality of engagement), what visitors respond best to and what they struggle with, as well as the extent to which their learning outcomes compare to intended outcomes.

Formative evaluation means that you must be open to making changes midstream based on something that does not seem to be working. For example, the exhibition team at the USS *Constitution* Museum was developing a family gallery and tested one of the entry activities designed to have visitors role-play the recruitment process for sailors. They discovered that the activity was not intuitive to family visitors, who did not know what to do and quickly became frustrated. Team members talked to families to identify possible changes, implemented their suggestions, and re-tested mock-ups with another group of families. They continued the process over two weeks and finally created an activity that families now see as self-explanatory and fun.<sup>5</sup>

## *Summative Evaluation*

The purpose of summative evaluation is to assess whether or not a project achieved its goals and objectives. This type of study is conducted at or near the end of an exhibition or program. Did the program do what it was intended to do? What specific aspects or components of the exhibition or program led to these outcomes? In some cases such studies provide staff members information they can use to further modify the exhibition or program. For example, if staff conducted the study on an exhibition that will remain open for some time, then findings from the evaluation could be used to make small changes, such as placement or content of labels. When modifications are not possible because of limitations, summative evaluation results are still valuable as lessons learned for future projects.

A summative evaluation conducted for the American Philosophical Society suggested that while

visitors preferred authentic objects to reproductions, they also saw the importance of using reproductions as an educational tool—as long as it was made clear that the objects were reproductions. While these findings were useful for the specific exhibition being assessed, they also informed the institution's future practices.<sup>6</sup>

## WHO SHOULD DO EVALUATION?

Many museums want to do evaluation on their programs and exhibitions but are not sure how to proceed. Sometimes the first question is, “Should I hire an outside evaluator or try to do it myself?” There is no simple answer to that question. An outside evaluator usually brings a greater degree of objectivity to a project, and their wide range of experience provides a broader perspective. Professional evaluators also will have greater experience and skills in designing studies, framing questions, selecting methods, and collecting and analyzing data. On the other hand, the process of doing evaluation as a museum practitioner provides excellent professional development opportunities for the staff. There may also be times when familiarity with an institution and its programs is especially desirable.

## *Doing it Yourself*

Whether you are a large institution or a small historic house, conducting evaluation internally can be beneficial. While smaller, in-house evaluation studies do not necessarily replace conducting comprehensive evaluation studies with an outside evaluator, there are numerous low-cost ways to keep your finger on the pulse of the visitor experience and involve staff in more deeply connecting to and valuing the visitor experience (See “Do it Yourself: Six Simple, Low-Cost Evaluation Activities”).

In-house evaluation can also be a nice opportunity to involve program participants. The Chicago Historical Society utilized members of their Teen Council to gather front-end data for a new exhibition and program called *Teen Chicago*. The benefits were three-fold: 1) using volunteer teens saved the institution money; 2) the teen data collectors gained valuable interviewing experience; and 3) teens who were interviewed for the study likely felt more comfortable sharing their thoughts with a peer than an adult.<sup>7</sup>

What follows are some helpful tips for conducting in-house visitor studies:

**1. Make sure your goals are clearly defined and agreed upon.** The most essential first step in conducting evaluation, whether on your own or with an outside evaluator, is to have a clear understanding of the project goals, and to develop consensus among key stakeholders. All should agree on the desired outcomes of the exhibition or program to be evaluated, and the questions you would like to have answered by the evaluation.

**2. Place reasonable expectations on yourself.** It will take time for you to develop evaluation skills. Do not expect it to come all at once. Look at this process as a long-term learning experience, keeping in mind that you are not a professional evaluator, and you are not expected to become one. There are many benefits to doing evaluation on your own. One of them is to use evaluation as a process through which you gain greater understanding of your professional practice and grow in your skills and knowledge.

**3. Be realistic about the scope of your project.** It is common for museum practitioners, excited about doing evaluation, to take on evaluation projects beyond their ability, time, and resources. Avoid getting overwhelmed. Select a small, focused question rather than a broad one. Start with a small group of visitors (twenty to thirty) to identify key trends and issues without using a lot of time and resources. Keep the number of questions to a minimum, and focus them specifically on what you want to find out. Last, evaluate only issues that you have the ability to change.

**4. Seek the support of other staff in the museum.** Do whatever you need to do to gain internal recognition for your evaluation project. Start small and use other staff members' questions/issues to form the basis of your initial evaluation. Have an initial group meeting in which staff can discuss what and how to evaluate from the very beginning. Evaluation is often seen as a negative process, one that will reveal what people have done wrong. Do not be disheartened at initial resistance or disinterest; it is common. You will need to educate others on the benefits of evaluation.

**5. Embrace the process more than the product.** Evaluation is not so much about a final finding as it is about informing the process of design and implementation. It reveals lessons we need to learn, and requires that we revisit our objectives and keep matching our actions to them. Remain open to learning about your practice. Use evaluation as an opportunity to capitalize on individual and institutional strengths, and to help increase buy-in and ownership among staff at all levels.

**6. Be creative about the methods you use to collect data.** Evaluation is as much an art as a science. Be open to experimenting and combining methods that are specific and well-tailored to your evaluation question. Think about using existing situations as opportunities to collect data. For example, if you are having a preview of an exhibition for teachers, how can discussions during this largely social event help you better define teacher needs? How can staff document these discussions to detect possible patterns and trends?

**7. Analysis and interpretation of data is the most difficult, yet most satisfying, step.** When you first look over the data you have collected, you will probably think that you have nothing more than a lot of interesting pieces of information but no larger meaning. Look again and again. Good information is almost always there and it gets easier to find as you gain experience. A few important points to remember:

- It takes time to reflect—don't rush the process.
- Always make analysis a team effort.
- Beware of jumping to conclusions or using one or two anecdotes to signify a trend—wait until all

## DO-IT-YOURSELF: SIX SIMPLE, INEXPENSIVE EVALUATION ACTIVITIES

Try these simple, low-cost activities to keep your finger on your audience's pulse. Use multiple methods: observing what people do, listening to what they say, or analyzing what they leave behind (such as comment cards).

- 1 Spend time on the floor.** Spending time observing visitors provides valuable insight into how visitors use the space, engage with exhibits, read labels, and have conversations. Draft a checklist of behaviors you are interested in, or simply write down what you see and hear.
- 2 Distribute simple survey cards.** Use simple survey cards to gather basic information about your visitors, such as age, gender, race/ethnicity, education, prior visitation, and residence. Design a half-page, attractive survey card to hand out to visitors or use as a tool for a quick interview.
- 3 Create multiple opportunities for visitors to leave comments.** Many museums have comment books available, but they are often easy to miss. Be creative with the media you use—such as cards in a variety of shapes and colors, or anything visually compelling. To avoid assembling random information, consider using prompts for specific feedback.
- 4 Talk to your visitors.** If you have a question about visitors, ask them directly. Talking with visitors does not necessarily require a detailed protocol, a long interview, or a large sample. Talking with visitors can range from a quick, ninety-second interview that is extremely simple and focused (e.g. did they notice a particular sign or interactive that you suspect is not well-placed?), to the "four-minute interview." [See Andrea Lewis, "Surveying Visitors, Plain and Simple," *History News* (62) 2 (2007): 17-19.]
- 5 The "piggy back" focus group.** Think about opportunities when visitors, teachers, and/or students are at the museum for another event—a professional development workshop or family event, for example. Spend ten to fifteen minutes getting feedback on a particular program, exhibition, or concern. This saves the time and effort of gathering people together and can make for a nice break in the regular agenda.
- 6 Create advisory groups.** Think about developing a variety of advisory groups, such as ones for families with young children, youth and teens, special needs, or specific cultural communities. Whenever you need some quick feedback from a particular audience, you'll have a list of contacts that can help represent that audience's perspective or help organize a focus group.

the data has been examined before deciding what it means.

- Be open to seeing what you were not looking for. Don't be disappointed if you do not get the expected results. Use them as a starting point for asking new questions.

Even if you always intend to work with outside evaluators, it is still important for you to be well-informed about evaluation, both what it is and why you are doing it.

## WORKING WITH OUTSIDE EVALUATORS

If you have decided to hire an outside evaluator, there are a few points you will want to keep in mind before and during the process.

### **1. An Educated Consumer is the Best Customer.**

Even if you plan to work exclusively with an outside evaluator, your work will be far more effective if you are well informed about the nature and rationale for integrated evaluation studies.

**2. Know Your Issues.** Spend time working with museum staff to outline the broad goals and specific outcomes of the project to be evaluated. Any good evaluator will ask you questions about these issues during your first conversation, so you will save time and get more satisfaction from if you have done your homework (see the "Evaluation Action Plan Worksheet"). Work on these questions as a team, so that staff writes down and agrees upon the desired outcomes before designing a project. While you will likely have many outcome goals, it is more effective to choose one or two to focus on for the evaluation. The next step is to form the broad evaluative question appropriate to what you want to measure. This is not an easy process, but it is essential. An outside evaluator will help you with this step, but your thinking will guide his or her work. Finally, be clear about why you want to answer that particular evaluation question. What do you intend to do with the information? Who will be the audience for the results?

**3. Know Your Audience.** When you contact an evaluator, you will need to bring something to the table about your audience. Avoid paying an outside evaluator to tell you what you could have learned if you spent a little time observing and talking to visitors. Review existing audience information available to you, such as previously-completed surveys or studies done by other organizations in your community on demographic trends.

**4. Good Contracts Make for Good Services.** A responsible evaluator will require that the two of you develop a written contract and a work plan/timeline for the evaluation. Either party may initiate the contract, but be sure to define expectations, as well as a means to address the unexpected. Time spent clarifying outcome goals and evaluation questions is the best

safeguard for staying on track.

### **5. Establish a Realistic Working Relationship.**

Ongoing communication is the key to a successful working relationship. The contact person and the evaluator will need to establish the details of when and how you will communicate. A staff representative is essential to keeping the institutional perspective in place and making critical decisions. The success of the evaluation will depend in large part on the clarity of communication and the responsiveness of the museum.

**6. Make an outside evaluator more affordable by collaborating with other organizations.** Small museums and historic sites may find it more affordable to engage an outside evaluator by creating a coalition of other organizations in their area that are seeking similar visitor information. Pooling funds might help all partners.

## THINKING EVALUATIVELY: ENGAGING YOUR WHOLE STAFF

One of the greatest challenges in developing an institution that thinks evaluatively is embedding this mindset among all staff—from the front desk to curators, administrators, and educators—and incorporating it as a regular part of institutional practice and culture. Institutional change takes a long time, and there are many small steps along the way. Further, developing a visitor-centered organization cannot happen through the work of one or two individuals. Following are some strategies and examples that can help get all staff on board.

**1. Have staff from all levels and departments observe visitors on the floor.** Thinking from the visitor perspective requires spending time with them. Doing observations is a relatively quick, simple, and non-threatening way for staff and volunteers to get a better sense of how visitors use exhibits or programming. Suggest that staff members take thirty minutes to walk around the museum and take notes on what visitors are doing and talking about. Ask them to observe what works well and potential problems or issues they notice. Encourage staff to write down whatever comes to mind, including thoughts, feelings, and impressions. At a follow-up meeting, have them share what they noticed, what trends they found, what was surprising, or what met their expectations. Specifically ask what they learned from this activity and what more they want to learn.

**2. Engage staff in a visitor role-play exercise.** The key to thinking evaluatively is being able to walk in the visitor's shoes. As this can be a difficult task, role-playing activities can help staff shift their thinking in a fun, engaging way. For example, Institute researchers conducted a workshop with staff from the Art Gallery of Ontario focused on evaluative thinking. They broke staff into groups and assigned each team

a visitor type (such as an older Asian couple interested in architecture; or a family with children aged two, six, and thirteen). Each team was then asked to think about the ideal experience for this visitor group and describe it in an imaginary letter/email. This activity allowed staff to clarify what they truly wanted visitors to experience. Surprisingly, many staff found that they did not focus as much on learning content but more on having the visitors feel excited, curious, comfortable, and welcome.

**3. Encourage staff to bring family and friends to the museum and visit with them.** While many staff bring friends and family to the museum, they usually take on an educator or tour guide role. Instead, have them practice coming to the museum or site as a *true visitor* and try to experience it as a visitor rather than a staff member.

**4. Involve staff in developing evaluation questions.** Involving staff from all different levels and departments in evaluation offers two key benefits. First, staff bring a variety of perspectives and visitor experiences to share. Second, they are more likely to gain a sense of ownership and appreciation for what evaluation can offer. Facilitate a brainstorming session with staff. Ask them what questions they have about visitors or what they have always wanted to know about visitors but were never able to ask. What do they think are some of the biggest issues visitors face or areas that the institution needs to improve upon in terms of the visitor experience? Next, encourage them to articulate which questions would need to be asked of visitors in order to understand the issue better. This activity can serve as a foundation for understanding what needs the institution has in terms of visitor research, while helping staff find value in visitor research.

**5. Involve staff in analyzing visitor feedback.** Another good way to engage staff in thinking evaluatively is to involve them in part of the analysis process. For example, set up a system in which different staff members are responsible each week (or each month) for reading visitor comment cards and summarizing notable trends for other staff. You can also have staff sort the cards into categories, look for patterns, and discuss what they learned and what that might mean for the institution. Often staff is surprised to find that their own perspective is not necessarily the same as that of many visitors.

**6. Have staff make predictions about the outcomes of a study.** If you are planning a simple evaluation study—such as what concepts visitors prefer or what exhibit/interactive is used the most—have staff make predictions about the results and support their assertions. Then have them help collect and analyze the data, followed by a discussion of the results and to what extent their predictions were correct. This exercise can help build enthusiasm and interest in the visitor experience, challenge people's assumptions,

and simply make evaluation fun!

While history museums face multiple challenges in attendance, resources, and sustainability, the field is also currently poised for exciting changes and growth. Whether you are conducting evaluation yourself, with an outside evaluator, or in combination, integrating evaluative thinking into planning and implementation can create incredible opportunities to connect with your visitors in more effective ways, build stronger relationships with the community, and generally keep your fingers on the pulse of a rapidly changing public.

Not only can evaluative thinking result in more effective programming and exhibitions, it can also energize staff, increase buy-in, and help them appreciate the impact of their work in new ways. In short, thinking evaluatively provides a crucial opportunity to drive change in the history museum field. It can help refine institutional and field-wide goals and outcomes, align programming with mission, and offer engaging, valuable and relevant experiences for diverse audiences.

## EVALUATION ACTION PLAN WORKSHEET

Whether you decide to utilize an outside evaluator or conduct the evaluation in-house, the following questions will help focus your goals and define the nature and scope of the project.

- 1 What are your "big" evaluation questions? What is it you want to know?
- 2 Why are you interested in investigating these questions? What will you do with the information?
- 3 What evidence would convince you that the evaluation questions have been answered?
- 4 How will you gather this evidence? What methods will you use and why?
- 5 From whom will you collect data—families, children, adults, members?
- 6 When will you collect the data— weekdays, weekends, a combination?
- 7 How much data will you collect—what is the desired sample size?
- 8 How much time will it take to collect the data?
- 9 Where will you collect the data?
- 10 What resources will you need for data collection (e.g., tables, clipboards, pencils, thank-you gifts)?
- 11 Who will be involved in the analysis and interpretation of the data?
- 12 How much time will be needed to interpret the data?
- 13 How will you disseminate and communicate your findings?

*Based on evaluation training materials developed by the Institute for Learning Innovation and the National Museum of African Art.*

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## How to Conduct Audience Research

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### Finding out what you really need to know about your audience

Audience research is about finding out who your existing visitors and program participants are and why they come. You do audience research to understand whether your current offerings are working for your current audiences. Market research is about understanding your existing and potential visitors, in order to attract and retain new audiences.

The following are the key steps in conducting useful audience research:

- Plan
- Design
- Test
- Collect
- Reflect
- Act

### Plan

Before you dive into the nitty gritty of designing audience research, first make sure you know why you are doing the research. This will help you to prioritise and focus your research activities. Ask yourself:

- Why are we doing this research? What do we need to know?
- How do we plan to use the research? Some common reasons for doing audience research include:
  - To report to funders about our audience reach and impact
  - To make sure we are reaching the audiences we want to reach, and they are having the experience we want them to have
  - To see if we are retaining audiences and attracting new audiences
  - To inform our next cycle of programming activities
  - To inform our strategic planning

Each of these reasons leads to different types of audience research questions and methods. Knowing why you are doing the research will allow you to focus your resources on the key questions you need to answer.

### Design

You can tailor a research process to meet the needs you identified in the planning phase. The attached table sets out some of the key domains which you may want to investigate.

### Test

Test the survey before sending it out so you know it works. Also do a 'sense' check of the survey. It is also very useful to check in with trusted peers or outsiders about the survey. Some questions to ask yourself and others could include:

- Does it make sense?
- Are there words which have more than one meaning?
- Are you asking questions you already know the answers to, or which simply confirm what you already believe?
- What questions could you ask which could challenge your views and open you up to new and surprising understandings about your audience?

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## Collect

There are numerous ways you can collect data about your audience. We have suggested three main methods of collecting information:

- Survey
- Observation
- Story collection

### Surveys

An audience survey should capture information about your audience demographics and their experience. It is a golden opportunity to go beyond the basics of postcode and satisfaction, and ask deeper questions about whether the visitors are finding their visit to the gallery or museum an 'intrinsically rewarding' experience. The idea of 'intrinsic reward' originated with [Kevin McCarthy's research](#) into arts experiences in the early 2000s, and has since been developed as a way to understand the dimensions of an arts experience.

### Tips for conducting a survey

An online survey is much easier to analyse as you don't have to enter the data from the survey into a spreadsheet. There are a number of online survey software services such as [SurveyMonkey](#) and [SurveyGizmo](#).

### Survey structure

We recommend structuring a survey as follows. This is to ease a respondent into the survey and obtain the most honest answers.

- Introduction / landing page
- Individual impact: the experience, personal value of the experience
- Audience behaviour: motivations for visiting, mode of visitation
- Institutional value: intangible value, point of difference
- Reach: access, equity, retention, attraction
- Improvements: feedback
- Thank you page

On the introduction page, provide some general information about the purpose of the survey and what you will use the data for. Keep it brief, and make sure you include statements such as 'there are no right or wrong answers,' 'this survey only takes about 5 to 10 minutes to complete' (and if it takes longer, you need to cut your survey down!), and 'your responses will be anonymous' (only guarantee this if you can be sure they will be).

Also on the introduction page, make sure you note that respondents must be aged 15 years or over to fill in the survey, and that by filling out the survey respondents agree that their responses can be used for research purposes.

On the thank you page, include a contact person if respondents have any further questions. If you are offering an incentive, you should also include a link to the form to fill in to be included in the draw at this point. This allows you to maintain the anonymity of respondents. NB you do not need a permit for incentives as long as certain guidelines are adhered to as outlined here <https://www.liquorandgaming.nsw.gov.au/Documents/gaming-and-wagering/competitions/fs3094-gratuitous-lotteries.pdf>

### Recruitment

We recommend the following steps to make sure you get a large and representative enough sample:

- Collect email addresses from visitors and send them the survey the same or next day, with an incentive to respond to the survey e.g. chance to receive a museum gift shop voucher. Note if you offer an incentive, you may also need to collect email addresses within the survey. To keep the survey anonymous, remember to set up a link within the survey to a separate email contact details page.
- Try to collect email addresses from a cross-section of the visitor population – young, old, tourists, locals, CALD, people with a disability etc.
- Have a few paper surveys to give to visitors who do not have an email address but would still like to participate in the research.
- You can survey people in the gallery as they exit using tablet computers or computers on stands, but make sure the survey is not too long as people don't want to stand and answer questions for more than 2 or 3 minutes.

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## Representative sample

What constitutes a representative sample depends on the total number of visitors, and their demographic characteristics. Here are a few useful rules of thumb to make sure you have enough data to comment confidently about your visitors' experience:

- Try to collect as many email addresses as you can. Work from the assumption that 20% of people you email will respond to the survey.
- Estimate how many people you think will be likely to visit an exhibition. Using that estimate, calculate how many survey responses you need to achieve a margin of error of, say, +/-10%. The Survey Sample Size Calculator is a very useful tool for working this out <https://www.surveysystem.com/sscalc.htm>.
- If you want to understand the experience of visitors across the year, make sure you collect data about visitors at various points during the year. You cannot use the results from one exhibition to describe the experience of visitors across the board.
- If you can, collect information directly from minority groups who tend to be under-represented in surveys e.g. CALD, ATSI. You may want to do this by conducting focus groups or one-on-one interviews with people from these groups. This is especially useful if you are trying to understand barriers to participation by minority groups. But when you do this, make sure you don't end up over-representing these groups in your survey sample – your overall survey sample should be roughly representative of the overall visitor population.

## Privacy

As with all customer information, you must manage survey responses in accordance with privacy laws. More information is available at <http://www.amsro.com.au/amsroresp/wp-content/uploads/2014/03/The-Privacy-Market-and-Social-Research-Code-2014-1.pdf> and <https://www.oaic.gov.au/privacy-law/>

## Observations

Observation of visitors is also a very useful technique for collecting data e.g. count of visitors, visitor behavior, duration of visitor interaction with various activities or exhibits. Here are some tips for conducting observations:

- Position an observer in each main exhibition space and give the observer a clipboard with a form to fill out. They can jot down the approx. duration of time each visitor spends with an exhibit and other observable details e.g. the visitor's estimated age.
- You are unlikely to have observers on each station all day, and that's OK. Make sure to use observers at the busiest times in the gallery, and if possible, at a range of other times on different days of the week. The observer should record the time, place and date they did their observations and should be in position for at least 30 minutes and preferably 60 minutes.
- Use a counter at the exits or entrances to obtain a reliable estimate of visitor numbers.

## Story collection

Direct quotes and stories from visitors is a great way to obtain a better picture of how visitors interact with your space, why they are there, and what they value the most about the experience. If you can, every so often head out into the space with a clipboard and a voice recorder and collect direct vox pops in response to a few key questions which you keep consistent throughout the year. You will find this a rich way to tell the story of the data you collect from observations and surveys. A few tips:

- Ask people for vox pops upon exit. Don't interrupt an experience!
- Make sure you get their permission to use their comments, either anonymously or attributed. Recording this is fine, but if you are not recording you will need to get them to agree e.g. sign a form or click a 'yes' box on a screen
- Consider taking photos of visitors to go with their stories. Make sure you get written permission that you can use their image.

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## Reflect

This is the stage in which you analyse the results of your data and reflect on what it tells you about your audience.

If you use online survey software, this step is relatively easy. The software will allow you to create graphs, compare different population segments and tally results. If you are manually entering data, you may want to do so with online survey software so you can take advantage of the automated analysis.

Use the Survey Sample Size Calculator to calculate your confidence interval, which tells you with how much confidence you can speak about the survey results as representative of the overall visitor population. If you need to report on a finding where you didn't get many responses, just say so upfront e.g. 'These findings can only be read as descriptive of the respondents' experiences as there were insufficient responses for representative results.' In general it is a good idea to report on the 'survey respondents' experience, as this is the most accurate description of the information you have gathered.

Revisit the key reasons you conducted the research at this point. Go back to the key questions you wanted to answer which you identified in the planning stage, and see if you can write answers to those questions now, based on the data.

## Act

Once you have the data, remember to act on it! The data is part of a planning cycle driven by data, and you should report on data to your executive and board on at least an annual basis and if possible, also for major exhibitions. You can use this valuable information in your programming cycle, strategic planning cycle, making improvements and reporting to funders. Fundamentally, you can use this data to improve your audience's experience.



### You might also like ...

#### Sample Size Calculator

<https://www.surveysystem.com/sscalc.htm>

#### BYP Group free resources and links

<http://bypgroup.com>

#### Gifts of the Muse: Reframing the Debate about the Benefits of the Arts

[https://www.rand.org/content/dam/rand/pubs/monographs/2005/RAND\\_MG218.pdf](https://www.rand.org/content/dam/rand/pubs/monographs/2005/RAND_MG218.pdf)

#### Guess who's going to the Museum?

<https://mgnsw.org.au/sector/resources/online-resources/research/guess-whos-going-museum/>

Research domain		Research question	Data to collect	Method of collection	Example questions
Individual Impact	Intrinsically rewarding experience	Do people have an intrinsically rewarding experience?	Personal experience: <ul style="list-style-type: none"> <li>• Engagement and concentration</li> <li>• Fun and enjoyment</li> <li>• Emotional response</li> <li>• Personal resonance</li> <li>• Intellectual stimulation</li> <li>• Spiritual experience</li> <li>• Aesthetic growth</li> <li>• Shared atmosphere and social bonding</li> </ul>	Survey Story collection	What are the three words you would use to describe how your visit made you feel?  Please tell us if you agree or disagree with the following statements: I had fun I got bored sometimes It got me thinking I had an emotional response I learned new things I felt like the experience changed me in some way There was a good atmosphere There was a good energy It was nice to share the experience with others (Responses: Yes/No/Don't know/N/A OR a Likert scale e.g. Strongly Agree Agree Neutral Disagree Strongly Disagree N/A)
	Personal value	What do people value the most about their visit?	Perception of value	Survey Story collection	What did you appreciate the most about your visit? Peace and quiet Amenity Exposure to touring exhibitions Local artists Café / social outing Gift shop

Research domain		Research question	Data to collect	Method of collection	Example questions
Audience Behaviours	Motivations	Why do people visit?	Reasons for attending	Survey	Tourist Something for the kids to do Visiting with friends See the new exhibition Other (please specify)
	Mode of visitation	Do people come alone or with others? How long do people tend to stay? What do people tend to do at the museum/gallery? How does their visit fit into their day/week/month/year?	Visiting alone or with others	Survey	Alone With friends With family With friends and family Tour group With community club or group Other (please specify)
			Duration of visit	Observation/Survey	About how long did you spend with the following: <ul style="list-style-type: none"> <li>Exhibition a</li> <li>etc</li> </ul>
			Behaviours while visiting	Observation/Survey	What did you like most about your visit today?
			Role and position of the visit in overall life	Story collection	n/a

Research domain		Research question	Data to collect	Method of collection	Example questions
Institutional Value	Intangible value	What do people most value about the museum/gallery? What would their view be of the town if it did not have the museum/gallery?	Attitudes	Survey Story collection	How important or unimportant do you think it is to have this museum/gallery in [location]? (Responses: Very important Important Neutral Not important Not important at all N/A) Open text (optional): Tell us more here
	Sense of welcome	Do people feel welcome at the museum/gallery?	Attitudes	Survey	Please tell us if you agree or disagree: I felt welcome at the gallery/museum The gallery/museum is a place for me The gallery/museum feels welcoming to people from all walks of life I feel comfortable visiting the gallery/museum (If no to any of these, probably ask an open text question - Tell us why here)
	Point of difference	What is special about this museum/gallery experience?	Perceptions	Survey	In your view, what, if anything, is unique about this gallery/museum?
	Overall evaluation	How do we differ or compare to other similar places experiences?	Overall evaluation compared to other similar experiences or places	Survey	On a scale of 1 (lowest) to 10 (highest), please rate your experience: <ul style="list-style-type: none"> <li>Overall</li> <li>In comparison to visits to similar galleries/museums</li> <li>In comparison with previous visits to this gallery/museum</li> </ul>

Research domain		Research question	Data to collect	Method of collection	Example questions
Audience Reach	Count	How many people do we reach?	Count of visitors	Observation	n/a
	Access and equity	<p>Who do we reach? Are we reaching segments of the population who face barriers to participating in arts and culture? Do we provide access to experiences which people would not have otherwise?</p>	Demographics of visitors: age, postcode, gender, income, CALD, disability, ATSI, typical level of arts participation	Survey	<p>Tip: put these questions towards the end of the survey. People prefer not to disclose information about themselves right up front.</p> <p>Please tell us about yourself. Do you identify as: A person of Aboriginal or Torres Strait Islander origin? A person with a disability? Were you born overseas? Was one or more of your parents born overseas? Do you speak a language other than English at home? How old are you? (offer range ranges)</p> <p>Are you: Male Female Other Prefer not to answer</p> <p>What is your postcode?</p> <p>In a typical year, about how often would you participate in arts or cultural activities such as visiting galleries, painting classes, making music, going to book group? None 1-2 times 3-4 times 5+ times</p> <p>In a typical year, about how often would you visit museums or galleries? (Same responses as above)</p>



Research domain		Research question	Data to collect	Method of collection	Example questions
Audience Reach	Retention and attraction	Are we attracting new visitors? Are visitors coming back more than once?	First time or repeat visitors	Survey	Is this your first time here? In a typical year, about how many times do you visit this gallery/museum?
Improvements		What else would people like to see at the gallery/museum?	Comments and suggestions	Survey	Please use this space for any additional comments and suggestions.

This resource was written by freelance evaluation, research and writing consultant Jackie Bailey, Principle at BYP Group as part of Museums & Galleries of NSW's *Engaging Art* initiative.

To find out more about BYP Group visit: <http://bypgroup.com/>

To find out more about *Engaging Art* visit: [mgsw.org.au/sector/exhibitions/engaging-art/](http://mgsw.org.au/sector/exhibitions/engaging-art/)

*Engaging Art* has been assisted by the Australian Government through the Australia Council for the Arts, its arts funding and advisory body.





# [name of museum] Exit Survey

[date]

We value your comments about your experience today. The information you provide will be used to improve our museum. Your responses are confidential.

- 1 What time did you arrive? \_\_\_\_\_
- 2 Have you ever visited the [name of your museum] before today?  
yes .....  no, first visit today ..
- 3 How did you FIRST hear about the museum? *please choose ONE*  
passing by.....   
been before.....   
newspaper .....   
recommendation by family/friend.....   
radio.....   
tourist center/information.....   
internet.....   
other *specify* \_\_\_\_\_
- 4 What was your reason for coming today?  
*please choose ONE*  
passing by/accidental.....   
recommendation by family/friend.....   
sightseeing.....   
professional/related to work .....   
to see a particular exhibition.....   
just like visiting museums.....   
other *specify* \_\_\_\_\_
- 5 How many people are with you today? \_\_\_\_\_
- 6 Did you come today . . .  
alone, with no one else? .....   
with other adults only? .....   
with other adults **and** children.....   
with child/ren only .....
- 7 What things did you most LIKE about your visit today?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 8 What would you IMPROVE?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 9 How do you rate your visit to the museum today?  
very good .....   
good .....   
neither good nor poor .....   
poor .....   
very poor .....
- 10 Would you recommend the museum to other people?  
yes .....  no .....
- 11 Would you visit again in the future?  
yes .....  no .....
- 12 What was your age at your last birthday?
- 13 Your highest level of education to date is . . .  
up to high school or year 12 .....   
2 year university qualifications.....   
4 year university qualifications.....   
graduate qualifications .....
- 14 Which best represents your current employment status? *CIRCLE ONLY ONE*  
work full time (35 hours or more a week)   
work part time .....   
looking for work .....   
home duties .....   
student .....   
retired.....   
travelling.....   
other.....
- 15 In which country were you born?  
United States .....   
other *specify* \_\_\_\_\_
- 16 How many years have you lived in USA?  
less than 5 years .....   
5-10 years .....   
11-20 years .....   
more than 20 years .....
- 17 Do you speak a language other than English at home?  
no, English only .....   
yes *specify* \_\_\_\_\_
- 18 Gender  
female.....  male.....
- 19 If you live in USA, what is your home zip code? \_\_\_\_\_  
  
If you live overseas, what is your country of residence? \_\_\_\_\_
- 20 What time is it now? \_\_\_\_\_

Thank you for your time in answering these questions. Please return your completed survey to the box at the entry desk. If you would like to receive updates about events and exhibitions at the Museum, please write your contact details on the back of this sheet.

Please turn over

## **INFORMATION ABOUT THE MUSEUM**

*To receive updates about events and exhibitions at the Museum, please write your contact details below.*

Name\* \_\_\_\_\_

Email address\* \_\_\_\_\_

*\*Please note that you may choose to complete this survey anonymously, however, if you do not provide your name and email address we will not be able to send you updates and information.*



# Sample Exhibit or Public Program Critique Form for Audience Evaluation

[YOUR LOGO and MUSEUM NAME]

## Museum Audience Evaluation Form

**Exhibit Title:** \_\_\_\_\_

**Museum:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Help us evaluate our exhibit and program. Please check the box that best describes your experience today:**

	Excellent	Good	Average	Poor
Exhibit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Docent Tour or Other Educational Programming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Please check the box that best describes your opinion about today's program:**

	Strongly Agree	Agree	Disagree	Strongly Disagree	Note
I learned something new today.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
This exhibit helped me think about the topic in a different way or made me want to learn more.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
The exhibit was respectful of or encouraged more than one point of view.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Exhibit labels helped me better understand the museum objects and their meaning or history.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
The docent or other programming added to my learning or appreciation of the exhibit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
I'm planning to tell my friends or family about what I learned today.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
I plan to return to the museum soon in order to learn more.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**How did you learn about this program (circle all that apply)?**

*Newspaper   Radio   Word of Mouth   Visitor Center   Museum's Advertising   Newsletter or Website   Other*

**Please let us know who you are (Circle all that apply).**

*International   Out of State   Utah Resident   Local   Senior Adult   Student   Family*

**What impact did this exhibit program have on you?**

Sign up to be on our mailing list. You'll receive announcements about other programs like this one.

Name: \_\_\_\_\_ Email Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_