



# MUSEUMS and HERITAGE SHOW

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NEVER MIND THE WIDTH  
FEEL THE QUALITY

May 2005

Researched by

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## Never mind the width, feel the quality From market research to visitor insight

Museums and galleries collect more visitor data today than ever before.

But how much of it gives us real insight into visitors' motivations, behaviour, experiences and responses? And how much of it simply ticks a box on a funding form?

Commissioned by some of the UK's leading institutions, including Tate, The British Museum, V&A and the Imperial War Museum North, Morris Hargreaves McIntyre has tackled this insight deficit head on.

In doing so, we have helped these organisations to move beyond the data routinely collected to get to the knowledge they actually need.

The models, norms and data presented in this report are the product of a significant programme of research into visitors to UK museums and galleries. Over a 12-month period, this programme included over 8,500 face-to-face interviews with visitors, 48 focus group discussions and 4,500 detailed observations of visitor behaviour. In short, this is both rich and rigorous data.

We found that the measures favoured by funders are simply too reductive. How many curators are inspired by, challenged by, or even interested in, their performance indicators?

Our aim was to devise more meaningful measures that can actually inform museum and gallery policy and programming. But while we have based these on new models of visitor understanding, this is no academic theory. We've devised practical methodologies and tools that measure things previously thought un-measurable. And we quote real visitor data and sector benchmarks for indicators such as depth of engagement and meaning making.

We would like to begin a debate about how we measure the impact and value of museums and galleries.

We offer this report as a starting point for that debate.

Morris Hargreaves McIntyre

April 2005

## I The evolution of visitor research

Until the late 1970s, most museums were left to their own devices, funded to collect and preserve for research and public benefit. Most were free to enter and so had little need to be concerned with visitors, let alone visitor research. In some museums, visitors were actually seen as a nuisance - getting in the way of the important work.

But it is Government policy that drives museum and gallery development and things were about to change.

With the arrival of Margaret Thatcher in 1979, came drastic cuts in public expenditure and an increasing pressure to be accountable for the money museums and galleries did receive. For the first time, museums were challenged to relate their public funding to the number of visitors using their services, in other words they were challenged to prove their public relevance.

### Counting heads

This generated the need for market data in the form of visitor head counts. These were very vague, unreliably gathered, sometimes inaccurate by a factor of 3 and, because they were barely monitored, were relatively meaningless. Once a museum had declared flawed visitor figures and conscientiously increased them on a year on year basis, it would have taken a national amnesty for all institutions to adopt an accurate count.

However, this period coincided with the growth of independent museums. These did charge for entry and therefore had a sure-fire way of counting their visitors. They were also market-dependent so the best ones saw themselves as being accountable to visitors, concerned to encourage repeat attendance, and to continuously improve product and service. This resulted in a new model for museum management.

### Spend per head

While the first response to funding cuts in many museums and galleries was simply to cut their cloth, there was a growing inclination, especially amongst the larger institutions, to follow the lead of the independents, respond to the Government challenge and compensate for dropping subsidy by developing strategies for income generation. This increasing market-dependency manifested itself first in a focus on selling and, therefore, the need to gather data on spend per head.

Whilst this part of the evolutionary process was taking place, the roles of education and visitor studies in museums was practiced as entirely discrete areas of work. They were unconnected with the financial imperative of needing to show an interest in visitors. Nevertheless they were concerned with the ways in which some market segments, especially those reached through formal education, responded to aspects of the programme, or how the public might respond

to exhibition design and interpretation. So, whilst the marketing department was busy, in another part of the museum, other departments were gathering public responses to the quality of experience on offer and the extent to which they were engaging with that experience.

### Satisfaction surveys

As time went on some of the more strategic museum managements were recognising that there was a direct causal relationship between maximising income generation and happy visitors whose needs were being met. This resulted in a need for information on customer satisfaction.

Customer satisfaction was also a measure for increasing accountability and responsiveness to the public who paid for the services. The introduction of Best Value in the late 1990s saw satisfaction ratings become a key, albeit blunt, part of the armoury of measures for museums and galleries.

### Target groups

The 1990s also saw an increasing emphasis upon access and, in latter years, upon life-long learning. Access was the particular emphasis of the Labour Party when it came into power. Museums were challenged not just to attract and satisfy more people, but to play a greater part in addressing the social exclusion issue. This resulted in a need to gather more detail on the demographic profile of visitors.

The Access issue also led to a greater internal recognition of the work of the education departments, and in the data gathered in the name of visitor studies. It is more widely acknowledged that if museums are to significantly alter the profile of their visitors, they have to design displays and interpretations that are engaging and informative for people arriving with little or no background knowledge or confidence in the subject matter. The part played by education, outreach and visitor studies is now central in addressing Government policy, and the information they gather is crucial in monitoring performance of museums against targets.

### Measuring learning

In recent years, two seminal works - All Our Futures (DCMS) and Inspiring Learning For All (MLA) - placed great emphasis on education and life-long learning and the social benefits that accrue from placing culture at the heart of the educational process. This movement placed the spotlight on museums and galleries as key players in the formal and informal learning process.

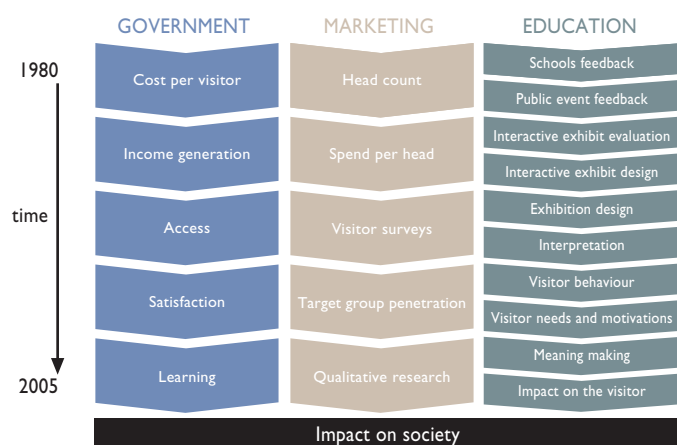
The result is that now learning is the dominant measure in museums and galleries and we are all trying to plan and evaluate against Generic Learning Outcomes. But we must not stop there, what about other social, emotional and spiritual outcomes?

## Impact on society

Side by side, this Governmental policy development and the responses of marketing and education staff in museums are all heading in one direction. The ever greater focus on visitors acknowledges that what we are now interested in is the impact on society that museums and galleries have.

The model below illustrates this evolution:

Fig 1. Evolution of Visitor Research



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But there is a problem. Although the Government, museums and galleries are beginning to develop a shared focus on visitor and societal outcomes, the many layers of measures and performance indicators accrued throughout the process of evolution threaten to obscure any emerging clarity and divert attention and resources from measuring what's really useful.

We have given this problem a name: target soup.

## 2 Target soup

The additional funding that has been given to the sector in recent years is very welcome, and it would seem churlish to complain that it comes with strings.

Equally, it doesn't behove organisations in receipt of public funds to resist full public accountability.

What, then, is the problem with the various performance indicators and service level agreements imposed by local authorities and national funders?

Well, there are two problems. First, a lack of co-ordination: target soup. And secondly, a lack of imagination that makes this soup thin, watery, insubstantial and not very nutritious.

### Too many cooks

This target soup is concocted by too many cooks. The targets and performance indicators set by different national funders don't always match and they can be very different from those imposed by local authorities.

When is a child not a child? At 15? Or 16? Or while they're still in full-time education? And do children from overseas on foreign school trips count towards the target? When is an older person old? At 60 or at 65? Or is it when they are officially retired? And is that the same for men and women? What do we mean by social exclusion? Sometimes, it's measured as residence in certain wards or postcode sectors, regardless of means, on other occasions it's commuted to the broad C2DE social grading.

And it's not just funders handing down targets. Museums and galleries are volunteering their own. So adept have we become at applying for project funding, that we anticipate the funders' agenda by declaring our own homemade targets. These are often very specific and so do not match existing measures.

A major national museum recently collated a list of the audiences that they have chosen to target and measure. The following is a only a short extract from that list:

- Families**
- Under 5s**
- Under 7s**
- 16-24 year olds**
- Adults 18-24**
- Adults 20-40**
- Adults 25-40**

These might not seem so problematic, until you attempt to measure and monitor them.

To construct a basic age question on a visitor survey that can measure these, and fit with MLA, DCMS, Audit Commission, and census age categories and the four school key stages is a complex task. In fact, just for people up to the age of 44, it would require a list of 18 age bands...



**How many people in your party, including yourself, are in the following age bands?**

- 0-2 years old
- 3-4 years old
- 5 years old
- 6 years old
- 7 years old
- 8-9 years old
- 10-11 years old
- 12-14 years old
- 15 years old
- 16 years old
- 17 years old
- 18-19 years old
- 20-24 years old
- 25-29 years old
- 30-34 years old
- 35-39 years old
- 40 years old
- 41-44 years old

If we're not confusing ourselves, then we risk confusing the public with convoluted survey questions. Which set or combination of these do we use to set our own targets? The age ranges are so narrow, that within 13 months a child can pass through 3 bands. So tracking historical trends almost requires a demographer.

In fact, getting the data for key measures requires 16 different permutations of the above survey answers involving 59 different measures. And age is one of the easy questions. Try something like measuring social exclusion or minority ethnicity, and you'll soon get into difficulty, particularly if different funders and different projects define it in different ways.

Funders have a perfect right to monitor, and museums and galleries ought to be accountable. But the task has become so technical and, frankly, so dull, that it renders the whole exercise a bureaucratic one. Instead of targets challenging and inspiring museums and galleries to greater heights, they are reduced to a mere administrative requirement.

## Lack of imagination

This brings us to the second problem: a lack of imagination. Curators, educators and marketers tend to be passionate about what they do. But they are not passionate about the existing performance indicators.

From our work with a wide range of national, regional and local museums and galleries, we conclude that these indicators are too quantitative and too reductive.

Curators want visitors to engage with the objects; educators want them to make meaning from the experience; and marketers want to visitors to feel that their needs have been met. But these outcomes are not routinely measured.

Instead, the performance indicators are firmly focused on head counts of various target groups.

The actual experience that visitors in these groups have, the outcomes of their visit and their future relationship with the institution are not yet common indicators of performance. MLA's Generic Learning Outcomes (GLOs) offer some hope that things are changing. They are beginning to influence how people plan and set objectives, although the practice of measuring these outcomes is still in development.

## Is satisfaction satisfactory?

One of the only nods towards quality rather than quantity is the inclusion of satisfaction ratings.

Asking visitors to rate their satisfaction with the experience would seem like a very direct and useful measure. Until you go beyond the headline satisfaction rating and analyse the data properly.

Then you might be surprised. We have found that the highest satisfaction ratings are given by those visitors who are the least knowledgeable, the least experienced, are on their first visit, spent the least time visiting and are least likely to return.

Conversely, those who are knowledgeable, experienced, regular visitors who spent the longest time engaging with the objects and who are most likely to return gave lower satisfaction ratings.

This phenomenon is easily explained: visitors' satisfaction is relative to their expectations. Those who expect the least are more easily satisfied. Those with higher expectations can see potential for improvements.

Satisfaction, therefore is not a particularly useful measure of visit quality.

## 3 Meaningful measures

Head counts are all very well, but what is needed are more meaningful measures. Measures that relate to the quality of the visit experience, measures that relate to the outcomes for the visitor and measures that simply help us to make more sense of the existing basic head counts.

At first glance, we are already collecting a lot of information. We count the number of visits made. Regular snapshot surveys demographically profile existing visitors and determine what proportion of them are new visitors. We even identify and count specific target groups.

But there's so much more we could do that would be so much more valuable and influential.

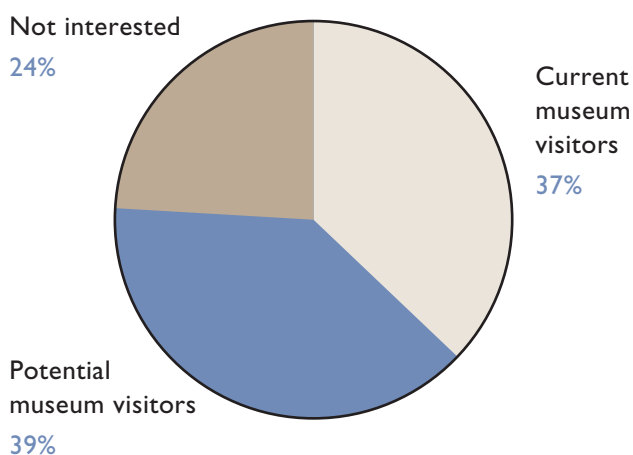
### Existing or potential visitors?

For years, national surveys of attendance and participation have concentrated on existing patterns of use, rather than measuring potential. At the same time, museums and galleries have been exhorted to develop audiences from amongst this indeterminate number of un-profiled potential visitors.

In practice, museums and galleries have taken the potential market to be those who already visit elsewhere, but don't visit them. These are the only people for whom data is readily available.

But it doesn't have to be that way. In Aberdeenshire, for example, standard survey data shows that 37% of the population currently attend museums. That's pretty much in line with elsewhere. What more do we need to know?

Fig 2. Propensity of population of Aberdeenshire to visit museums



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When we used our enhanced survey questionnaire, we discovered that another 39% don't currently attend museums, but would be interested. We just doubled the size of the market - with one question. Shouldn't this be a standard question? Shouldn't this be a standard measure?

### Snapshot surveys or representative samples?

Snapshot surveys have their place. They're quick and they give instant results. They can be useful, but they're not always representative.

To get a true picture of the whole audience, the survey sample should include people who attend on weekdays and those who attend at weekends, those during holiday periods and those during term-time and at all different times of year. The visitors on a Bank Holiday weekend in the summer are probably different from those on a wet Tuesday afternoon in February. And they need to be in proportion to the visitor flow at those times.

If you want to track trends or the impact of particular temporary exhibitions, you'll need to sample properly, and almost certainly more comprehensively. Surprisingly, you may not need to increase the sample size as much as you might think.

The British Museum amongst others have chosen a rolling visitor survey and we hope that many more will follow.

### Visits or visitors?

Let's be clear what we mean. A visit is a single occasion on which a person spends time in the museum or gallery. A visitor is the person who makes that visit. One visitor can make many visits.

All that is required to turn the head count of visits into the number of visitors responsible for them is a simple measure of frequency. If the average frequency of visits per year is, say, 4, then the number of visitors is one-quarter of the annual head count of visits.

This is an easy calculation, but one that is not routinely performed. One of the reasons for this is that standard research perpetuates poorly-worded frequency questions. Instead of allowing visitors to report their actual frequency, they are often asked to choose between bands of frequency, for example 1-2 or 5-10 times per year. This produces vague results. Should we count the 1-2 frequency band as 1, 2, 1.5 or some other fraction in between? Do we average the 5-10 band at 7.5? Or are there more 5s than 10s? Asking for the exact number gives us the exact frequencies and a reliable market size. Without the exact number, any frequency calculations are little more than guesstimates.

Data from Manchester Art Gallery shows that they've increased the number of visits from 128,000 before lottery re-development to 306,000 afterwards. But, more importantly, they've increased the number of actual visitors from 23,000 in to 136,000. That's 113,000 more real people. Kate Farmery, the Gallery's Head of Marketing, can now accurately track this growth and measure the Gallery's increasing penetration of the potential market. Without using our simple, effective frequency question, she would never have been able to do this.

If we don't know how many individual visitors we get, then how do we know what proportion of the potential market they represent?

The vagueness doesn't end there. Even when setting performance indicators and targets, measures of visits and visitors are often used interchangeably. This can set up museums and galleries to fail.

Imagine that a museum has 25,000 visitors who visit an average of 4 times per year, producing 100,000 visits. They are set a target of a 10% increase next year.

If that target is set on the number of visitors, they'll only need a relatively achievable 2,500 extra people. However, if it is set on the number of visits, they'll not only need 10,000 extra visits, they'll need 10,000 extra visitors to make them. Why? Because the average frequency of new visitors is only once a year. A target of 10,000 extra visitors represents an unachievable increase of 40% in just one year.

## When is a new visitor not a new visitor?

Almost everyone in the UK has been to a museum or gallery at some point in their lives, even if they were taken by their school. A majority have visited as adults. It's therefore difficult to find a genuine 'first time' attender.

It's somewhat easier to find people who have never visited a particular museum or gallery. But even here, you will find many people who have visited in the past but have not been recently: so-called lapsed attenders. If someone has not been for twenty years and you persuade them to return, most would rightly regard them as a 'new' attender.

But at what point do we regard people as having lapsed? This is a vitally important definition for audience development. Funders have, and still are, ploughing millions of pounds into the acquisition of new audiences. Targets are set and museums and galleries are being judged on their success rates.

It is important to really understand visitors and their patterns of behaviour. Some museums are counting anyone who has not visited in the past 12 months as a 'new' visitor. This means that anyone who has visited every 18 months, maybe seven or eight times in the past 10 years, has been a 'new' visitor on each occasion.

There are huge numbers of people who visit less than once a year and who will, of their own accord, make their occasional visit to a museum over the next 12 months. Museums could achieve several million of these without even trying. To count these as new visitors is unhelpful and to view this as audience development distracts us from the task of attracting genuine new audiences.

## Beyond the usual survey

Most visitor surveys are very basic and yield data that classifies visitors but does little to help museums and galleries understand them.

A common complaint amongst the museums and galleries we have worked with is the poverty of insight from the standard visitor surveys.

Most questionnaires feature the usual age, gender, social grade, party size and postcode. They probably include the

usual frequency and satisfaction questions previously discussed.

On top of these, there are often questions about reasons for visiting that tend to confuse publicity prompts (saw an advert) with genuine motives (I wanted to take the children).

Beyond these limited basics, some surveys invite visitors to agree or disagree with attitude or outcome statements and ask if expectations were met. While these are by far the most interesting and useful questions, they are often unstructured and under-analysed.

Major institutions now have reams of data about visitors but are no nearer to understanding why they come, what they expect, what their needs are or how they respond.

All of these are definable and measurable in surveys and can give rich, deep insight into visitors. The work we have done, some of which is included in this report, produces clear benchmarks and norms for these measures. Once you've paid for a basic survey, the cost of including these questions would be marginal, but as a sector, we seem to have normed our measures and normed our practices at a rather basic level.

## From market research to visitor insight

We think it's time to move from basic market research to rich, challenging, visitor insight.

Over the next few pages, we set out a framework for such a transformation. We share our models, quote real data and sector norms for measures that we believe are best practice, but are not yet common practice. And we share some of the tools that we have designed specially to do the job.



## 4 Meaningful models

Traditional sector research makes a distinction between qualitative and quantitative research. Quantitative surveys are robust but limited in scope. Qualitative techniques produce rich, but unquantifiable insights.

Our approach deliberately breaks down this artificial divide.

The bridge between these two types of research is modelling. Essentially, we gather as many qualitative responses as possible using a battery of techniques, some we have devised ourselves.

We then analyse, pattern, classify and structure this data into models of visitor motivation, behaviour and response. We then use these models to generate quantitative survey questions that can accurately measure these motivations, behaviours and responses.

All the time, we are testing, challenging and refining our models and adding new ones as we tackle new areas such as family behaviour or meaning making.

We have taken an unashamedly theoretical approach to understanding visitors and have drawn on sociology, anthropology and behavioural psychology to develop our practice. But we have translated this theory into real-world strategies to help museums and galleries develop new and existing audiences.

Here are some of the models we have developed:

### Hierarchy of Visitor Engagement

Survey questions often ask about 'reasons for visiting'. These sometimes confuse motivation (what benefits you are seeking from your visit) with prompts (what publicity did you see that brought it to your attention) and attractive features (elements of the visit experience that particularly appeal).

Our Hierarchy of Visitor Engagements is definitely concerned with the first of these, motivation. It models the fundamental reasons that make people visit. People visit museums and galleries in the hope and expectation that the visit will meet their various needs.

The motives listed in this Hierarchy have been painstakingly defined from dozens of focus groups in which visitors reported, articulated and discussed the benefits they were seeking from a visit to a museum or gallery.

The classifications have then been grouped into four key drivers: Social, Intellectual, Emotional and Spiritual. In turn, these four groups and the motives within them are arranged into a Hierarchy of Visitor Engagement. Those at the top of the Hierarchy engage more deeply with objects and collections than those at the bottom of the Hierarchy.

Although this Hierarchy has been meticulously assembled from empirical evidence, the model has striking parallels with Maslow's Hierarchy of Human Needs. We have therefore mapped Maslow's categories onto our Hierarchy to show how the two models relate to each other.

Fig 3. Hierarchy of Visitor Engagement

Morris Hargreaves McIntyre's Hierarchy of Visitor Engagement		Maslow's Hierarchy of Human Needs	
Spiritual	Escapism	Self-actualisation	
	Contemplation		
	Stimulate creativity		
Emotional	Aesthetic pleasure	Aesthetic	
	Awe and wonder		
	Moving	Cognitive	Esteem
	Personal relevance		
	Experience the past		
	Nostalgia		
	Insight		
	Sense of cultural identity		
Intellectual	Acad/prof interest	Social	
	Hobby interest		
	Self-improvement		
	Stimulate children		
Social	Social interaction	Social	
	Entertainment		
	To see, to do		
	Inclusion, welcome		
	Access		
	Comfort, security, warmth	Safety	Physiological

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We have explained the categories in the Hierarchy as motivations. However, it is also important to understand that they are also expectations - that is to say that these are the benefits visitors expect to get from a visit. They can also be read as outcomes - that is to say that after the visit, visitors may or may not have gained these benefits.

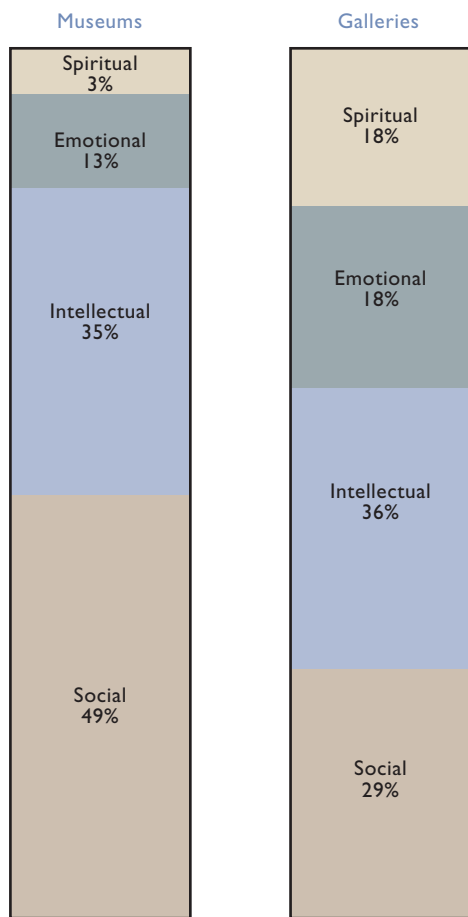
This allows us to construct a three-part question: we ask visitors what their main motivation for visiting is; we ask what all of their visit expectations are; and we ask for all of the outcomes they got. From this we can derive two other measures: the highest expectation they had and the highest outcome they got. Further analysis allows us to compare and contrast expectations and outcomes. The analysis produces a set of measures that illuminate our understanding of visitors' motivations, expectations and outcomes.

We have undertaken used the Hierarchy of Visitor Engagement at over twenty five museums and galleries including: The British Museum; V&A; National Gallery; Royal Academy; Tate Modern; Tate Britain; National Portrait Gallery; Ironbridge; and National Galleries of Scotland.

# NEVER MIND THE WIDTH, FEEL THE QUALITY

Each site can understand its own visitors and can compare them to Morris Hargreaves McIntyre's benchmark norms. The norms below are for visitors' main motivation. The left hand column shows visitors' motivations to visit museums while the right hand column shows the motivations for visiting art galleries.

Fig 4. Norms for main motivation to visit



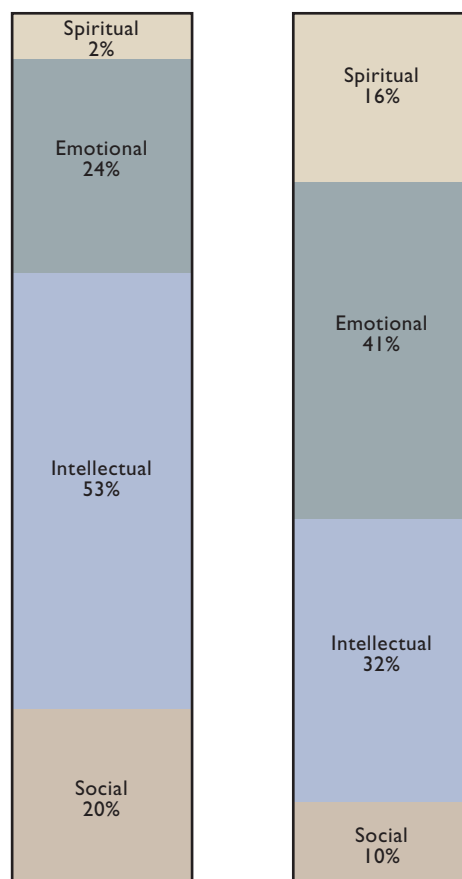
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The first thing you notice is how different they are. 49% of all museum visitors are driven by a social motivation. For art galleries, this is only true for 29% of visitors. For both museums and galleries, over a third of visitors are driven by intellectual motives. Emotional engagement drives just 13% of museum visitors and 18% of gallery visitors. But it's at the top end of the Hierarchy that galleries achieve deeper engagement. 3% of museum visitors are driven by spiritual motives such as escapism, contemplation or creativity. In art galleries this driver is six times higher at 18%.

While the above measures tell you why visitors visit, the following measures compare their expectations with the outcome.

This is real data from the Sudan: ancient treasures exhibition at The British Museum. The column on the left shows the visitors' minimum expectations of their visit to the Museum. The column on the right shows the highest level of outcome they actually got from visiting the exhibition.

Fig 5. Expectation -v- Outcome



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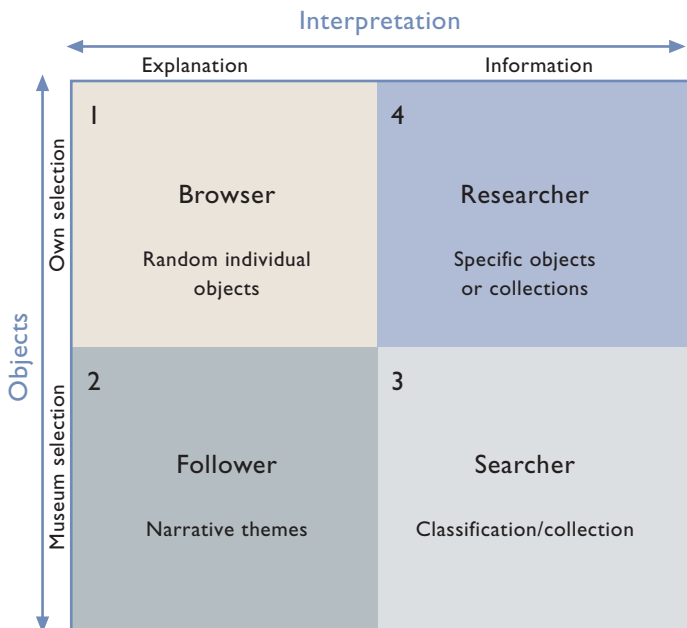
What is immediately clear is that the outcomes of the Sudan exhibition far outstrip the visitors' expectations of the Museum. Almost half engaged with the exhibition on an emotional or spiritual level. The higher up the Hierarchy, the greater the engagement, the more profound the outcome. And, unlike the usual measures of satisfaction, this measure verifies the quality of their experience and even explains how they engaged.

The above measure is for the highest level achieved. However, visitors may achieve various permutations of these four levels during a single visit, depending on their experience, knowledge, confidence, the visit context and their own personal starting point. Separate analyses can show what proportion of visitors experienced any engagement at each level. This data can underpin and contextualise observations and measurements of how people behave, interact and use interpretation.

## Hierarchy of Meaning Making

We have identified four modes of meaning making. The model below defines them in terms of how objects are selected and what type of interpretation they require.

Fig 6. Hierarchy of Meaning Making



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We can further describe each of the modes:

### Browsers

Select objects themselves by browsing the exhibition, they will wander until they find a 'gateway' object that catches their attention

Require an explanation of their selected object to be able to make meaning

Can be moved into the Follower stage by encouragement to follow explanation on to other related objects

### Followers

Want the museum to select objects which illustrate themes or topics to follow

Require a narrative explanation of themes to be able to make meaning

Can be moved into the Searcher stage by encouragement and scope to follow personal interests, this may then lead them to searching for related objects

### Searchers

Already have a good general understanding, or intellectual grasp of the topic - they want to consume all the information available in the museum / exhibition on that subject

Rely on the museum to select and present objects that fit into their field of interest

Can be moved onto the Researcher stage by direction to further sources of information

## Researchers

Are focused, specialist museum visitors. They select objects themselves based on their in-depth knowledge of the subject

Want access to expert information - a specialist curator or scholarly work on specific objects or collections

We have arranged these modes into a clear Hierarchy, with Browsers at the bottom, making the least meaning, then Followers, Searchers and finally, Researchers making the most meaning.

Each of the visitor types identified make meaning from objects in different ways, consequently they have different requirements in terms of the selection, display and interpretation of objects within an exhibition. Browsers and Followers lack contextual knowledge and so require explanation, ideally delivered in a rich sensory format. Searchers and Researchers have a level of pre-existing knowledge or intellectual curiosity and so bring their own context to the interaction. Their principle need is for easy access to detailed information.

Many visitors enjoy a passive or reactive visiting experience, for them to have been to the museum and to have seen objects is a satisfactory experience in itself. However, the more proactive the museum can make visitors and the deeper the level of engagement they can facilitate, the more fulfilled visitors become through their visit.

Visitors who are continually browsing an exhibition can only making fleeting connections with a limited number of objects. Followers make connections with a number of related objects and leave with an understanding of key themes. Like Browsers the dominant mode is one of passive consumption. Searchers are interested in whole exhibitions, they either enter in this mode or are encouraged to develop this behaviour as they latch on to successful interpretation. Researching behaviour tends to be developed over a long period of time; these visitors have specific and focused areas of interest. Both Searchers and Researchers expect to be proactive in their behaviour.

If a museum or gallery is committed to developing visitors' levels of engagement it should seek to encourage visitors to develop their meaning making skills by selecting objects and offering interpretation that propels visitors up the Hierarchy and engages them proactively.

# NEVER MIND THE WIDTH, FEEL THE QUALITY

The Map of Visitor Needs below describes the needs of each mode in terms of the context (why they engage), the content (what they engage with) and the experience (how they engage).

Fig 7. Map of visitor needs

Context Why they engage	REACTIVE		PROACTIVE	
	Browser Awe and wonder: Visually arresting Famous Intrinsic appeal	Follower Points of engagement and connection  Promised experiences or outcomes  Themes and narratives	Searcher Need to be able to locate objects of interest  Signposts to contextual information if required	Researcher As Searcher plus: Ability to search for particular items  Detailed provenance  Links to academic sources of information, publications  Location of related collections
Content What they engage with	Just enough objects to look at  Headline information to catch attention	Enough objects to constitute themes (some objects could repeat)  Enough information to develop themes	All objects in the collection  Enough information to identify and distinguish objects of interest  Clear description and explanation	As Searcher plus: Links to similar collections  Authoritative, scholarly commentary  Physical/technical data
Experience How they engage	Impact on the senses  Involving - interactives	Mix of media to involve in themes:  Lo-tech, eg. Information sheets  Hi-tech, eg. Audio, video, 2D graphics, animation, zoom	User friendly way of accessing information  Glossary or key to jargon and codes  Pictures  Information to take away	Functional, uncluttered way of accessing information  Pictures  Information to take away

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But this is not simply a model. It is also a practical tool that produces a meaningful measure.

On a micro level, these four modes of meaning making can be successfully and accurately observed and recorded. This allows researchers either to track the meaning making mode of a single visitor as they progress through the building. Equally, it allows us to compare the modes of many visitors in a particular space with those in another space or those of families with those of adult visitors.

On a macro level, we can survey the entry mode of each visitor and the range of modes used during the visit. From this we can derive the highest mode achieved on our Hierarchy.

Rather like the analysis of the Hierarchy of Visitor Engagement discussed earlier, we can then measure the development of meaning making during a visit.

Let's take two key measures: the percentage of Browsers that become Followers during a visit; and the percentage of Followers who become Searchers during a visit. And we'll compare these across two institutions, which we'll call Museum A and Museum B.

Fig 8. Development of Meaning Making

Development of Meaning Making	Museum A	Museum B
Browser to Follower	10%	25%
Follower to Searcher	23%	26%

While both museums do reasonably well at helping Followers to become Searchers, there is a marked difference in their success rates in engaging those visitors who enter as Browsers. In Museum A, nine out of every ten Browsers never achieve a higher level of meaning making. Although they may have enjoyed their visit and are likely to report high levels of satisfaction in an exit survey, they have not really connected with the objects on display and this will severely limit their outcomes.

Museum A has actually pitched its interpretation at a level that Browsers do not readily connect with. If Browsers do not use the orientation information provided there are few other points of entry during the visit. Museum B, however, has provided Browsers with a number of potential 'gateways' throughout the exhibitions that encourage Browsers to engage and become Followers.

Museum A could make changes to its interpretation scheme that specifically cater for Browsers and these should improve its success rate considerably.

## Measuring impact

We believe that the two previous models and their associated analyses and measures represent a breakthrough in measuring museum and gallery impact.

Essentially, what they can measure is visitors' depth of engagement with the objects and visitors' depth of meaning making. These are not the only outcomes and impacts. But they are, surely, two of the most crucial.

When museums and galleries conceive of an exhibition or display, research it, design it, interpret it, construct it publicise it and open their doors to the public, it is in the hope that visitors will engage as deeply as possible and make as much meaning from the experience as possible. Being able to accurately, quantitatively, measure these essentially qualitative responses has profound implications.

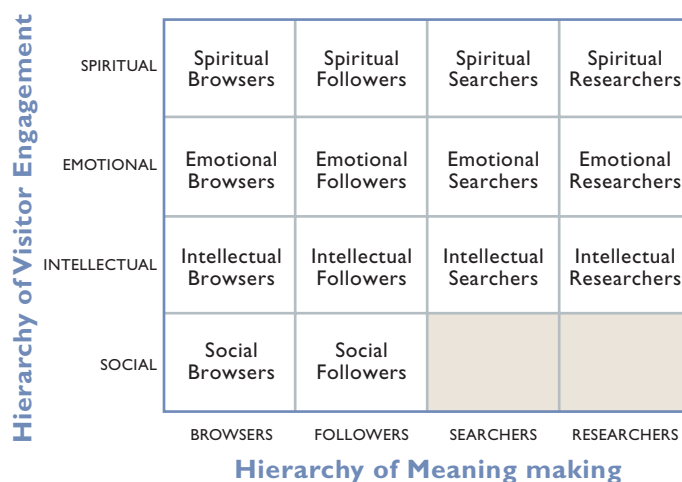
Internally and professionally, it creates a powerful feedback loop. We can tell if the experience is producing the desired outcomes and whether there are certain types of visitor whose needs are not being met. This is not simply a retrospective, summative evaluation tool. This approach provides a framework for concept testing, formative evaluation and prototyping during the development of new displays.

But there's more. These two Hierarchies are powerful in their own right. By combining them, we can create a qualitatively rich and quantitatively robust measure of overall museum or gallery impact.

Using our enhanced survey questions, we can plot each respondent's main motivation against their primary mode of meaning making on entry. This allocates each respondent to one of 14 starting positions on our Impact Climbing Frame. The two boxes in the lower right corner of the Climbing Frame are empty because Searchers' and Researchers' minimum level of engagement is Intellectual.

Each of these 14 behavioural types approaches the visit in different ways and not all will successfully engage with the existing provision for orientation, visitor information or interpretation. Understanding their starting point allows this provision to be refined and can help the museum or gallery to plan interventions to modify their default behaviours and facilitate deeper levels of engagement and higher levels of meaning making.

Fig 9. Impact Climbing Frame



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The process described above plots visitors' entry position. Using the same survey questions, we can also analyse and plot their final positions. To do this we plot the deepest level of engagement they achieved against the highest level of meaning making achieved.

The movement from each visitor's starting position to their final position represents a powerful measure of the impact of the visit. The more engaging the experience, the more that visitors will move from the left to the right and from the bottom to the top of the Impact Climbing Frame. For example, a Social Browser, once they encounter the exhibits and interpretation may become fascinated and end up as an Intellectual Browser or Intellectual Follower. They may be deeply moved or amazed by what they see and end up as an Emotional Follower or Emotional Searcher.

Equally, someone entering as an Intellectual Follower may be unimpressed by what they find or simply fail to connect and end up as a Social Follower. The Impact Climbing Frame can measure negative as well as positive impacts.

We already have norms for both of these Hierarchies and we will soon have benchmark norms for the Impact Climbing Frame. With these powerful measures, any museum or gallery could: contrast visitor impact in different parts of the building; contrast the impact on different visitor types; evaluate the impact of different interpretation and display schemes; measure the institution's overall impact; and benchmark against other institutions.

We believe that curators do care about visitors' depth of engagement and levels of meaning making. We think they care passionately about them. They are not satisfied with superficial visitor experiences that produce insignificant outcomes.

That's why we believe that these measures are meaningful. More than that, we believe that they are challenging and could be inspirational. Finally, we can measure something that really matters within the sector rather than just to the funding bodies.

There is no reason why these and similar measures could not become standard practice and become a standard currency, valued by all.



## 5 The right tools for the job

### Better survey questions

We have already discussed the difference between the standard national survey questions and those that give richer, more meaningful data. In particular, we have covered the potential improvements to questions about motivation, satisfaction, frequency and age.

We have also introduced the idea of questions about meaning making. But in our toolkit for more meaningful data there is a raft of other questions we routinely ask and for which we now have robust norms and benchmarks.

### Incidental or intentional?

For example, we ask whether visitors are intentional (visit was planned before they left home today) or incidental (visit was made spontaneously). This simple piece of data provides an entire context for the visit. Intentional visitors arrive with a considered agenda and have allotted sufficient time to their visit. They are more likely to achieve deeper levels of engagement and higher levels of meaning making.

Conversely, incidental visitors spend less time in the venue, are less aware of what there is to see and do, are more likely to have Social motives and expectations and more likely to be in Browser mode. They also tend to be less experienced, less knowledgeable and less confident visitors. For these Social Browsers in a hurry, museums and galleries need to be able to frame their visit and give it direction and purpose. This means that the welcome and orientation phase of the visit is crucial and that the interpretation needs to quickly engage them.

Our research for Tate Liverpool revealed very high levels of incidental visiting, mainly attributed to its location as part of Liverpool's Albert Dock visitor destination. Many of these incidental visitors were wandering in, briefly looking at art they didn't really understand, visiting the shop and caf and reporting high levels of satisfaction on exit.

Tate responded to this finding by taking up the challenge to engage these Social Browsers. They radically changed their foyer orientation, provided opportunities for 'bite sized' visits and trained their staff to help these visitors to engage with the art. This increased the average length of visits, the depth of engagement, the level of meaning making and the likelihood of repeat visiting.

### Probing deeper

We can give examples of other questions that measure visitors' risk aversion, their understanding of key brand values, their level of knowledge and confidence and where, when and what kinds of exhibitions and collections they will visit.

These questions are useful in their own right, but what adds real value is the way in which they are analysed. By combining and cross-tabulating them with each other and with the

models and hierarchies discussed previously, we can profile, group and segment visitors in a variety of ways that have a direct impact on museum and gallery policy and practice and which provide rich, yet robust measures.

### Engagement observations

We have developed a technique that uses observation to record measure visitors' levels of engagement with selected objects and displays. Visitor behaviour is recorded on a matrix (figs 10 and 11) mapping their depth of engagement against their usage of interpretation materials.

First, it categorises the depth of their engagement. It uses an applied scale of engagement stages rather than the generic scale used in the Hierarchy of Visitor Engagement. The lowest level on this scale is Orientation towards the object, display or interactive. This is the stage in which the visitor evaluates the opportunity and decides whether to invest further time and effort. If they choose to pursue the engagement, they progress to the Exploration stage in which they examine, read or touch in an attempt to make meaning and achieve a worthwhile outcome. If they achieve such an outcome, they progress to the Discovery stage in which they get the return on their investment. If they become engrossed or fascinated or simply make a very strong connection, then they may reach the ultimate stage - Immersion. We record the highest level that the visitor achieves.

On a second scale we record the visitor's use of interpretation during the engagement. They might use no interpretation at all, audio, visual or textual interpretation provided by the museum or gallery or they might have the experience mediated by another person - either a member of staff or another person in their party.

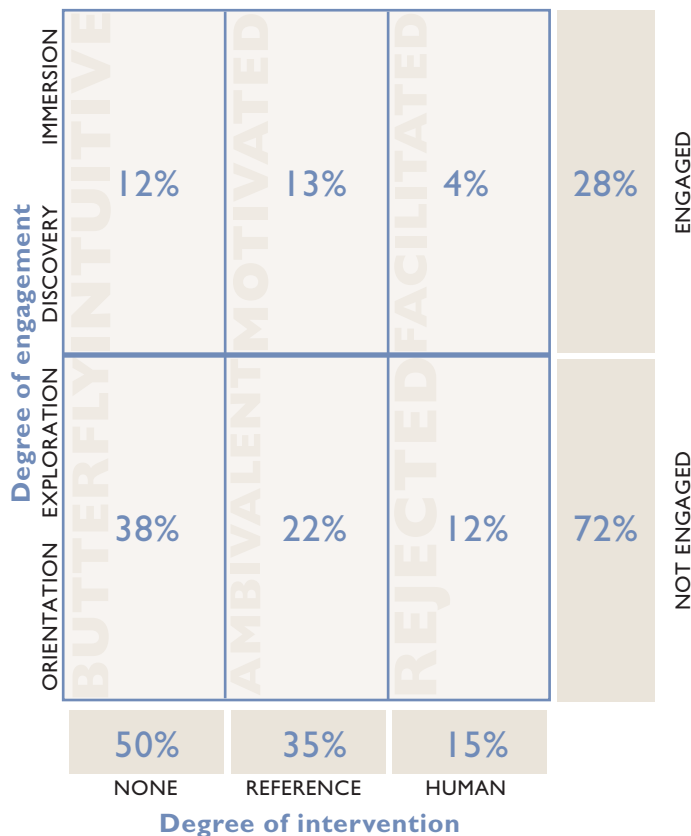
Finally, using detailed notation, it records the nature of the party composition making the engagement, i.e. the number and age of visitors interacting with each other whilst addressing the exhibit.

Analysis provides a series of consistent quantitative measures of what is essentially a qualitative experience. The technique doesn't just reveal whether an exhibit is achieving its desired outcomes, but how it is achieving them and enables us to identify which elements of the exhibition are most successful at engaging visitors.

# NEVER MIND THE WIDTH, FEEL THE QUALITY

The example below shows the results for a relatively unsuccessful exhibit in a major national museum:

Fig 10. Engagement Matrix: unsuccessful exhibit



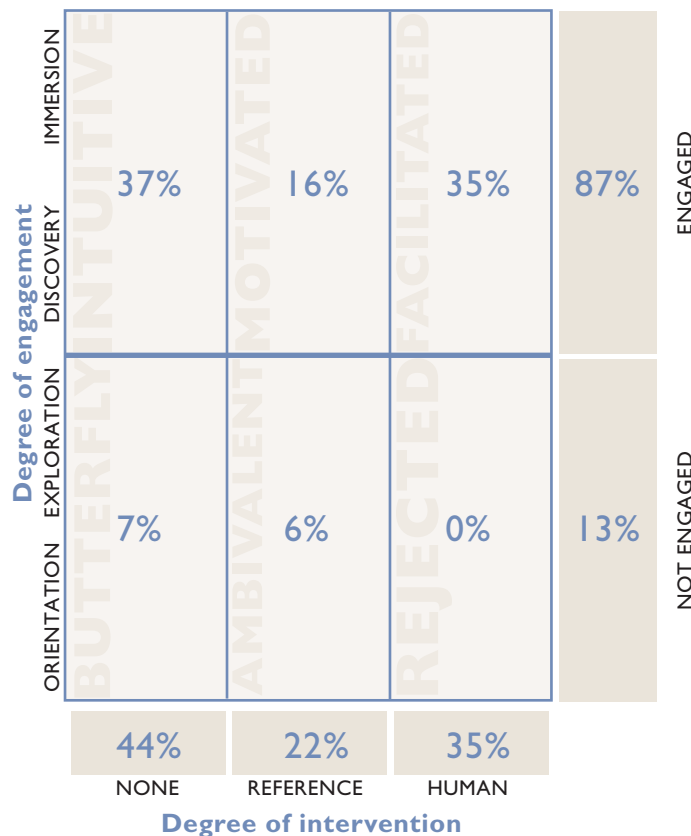
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You can see that 72% never reached the Discovery stage, we regard these as unsuccessful or not engaged. 50% did not use any interpretation. This could be explained by poor ergonomics (eg. lack of visibility, poor positioning). Of the 35% who used the reference interpretation provided, 22% failed to engage. This could suggest that the text is not particularly interesting or may be impenetrable for many visitors. Most of the 15% of visitors who had their visit moderated still failed to engage. This could suggest that the exhibit is not intrinsically engaging or that those attempting to facilitate also struggled to interpret the exhibit.

As well as totaling the rows and columns, we have grouped up the respondents into 6 groups: Butterfly, Ambivalent; Rejecters; Intuitive; Motivated and Facilitated.

Below is an example of a successful exhibit in the British Galleries at the V&A:

Fig 11. Engagement Matrix: successful exhibit



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You can see clearly that this exhibit works and how visitors have engaged. As well as producing these quantifiable measures, the observations produce a rich commentary of behaviour and overheard comments that add significant context to these results. They can also be augmented by brief interviews to probe specific issues.

## Post-it note responses

Participants are invited to react to a museum or gallery display or exhibition by writing their spontaneous responses, questions, comments or suggestions on Post-it notes and sticking these close to the exhibit or location where the thought was prompted.

This is a very useful device for eliciting the kind of spontaneous reactions from target groups that you would simply be unable to capture during interviews or focus group discussions. They can be transcribed for analysis, and participants can discuss what they wrote and why in a post-visit discussion group.

It is also possible to give different coloured Post-it notes to different types of visitors, such as families or independent adults, so that their comments can be compared and contrasted.

# NEVER MIND THE WIDTH, FEEL THE QUALITY

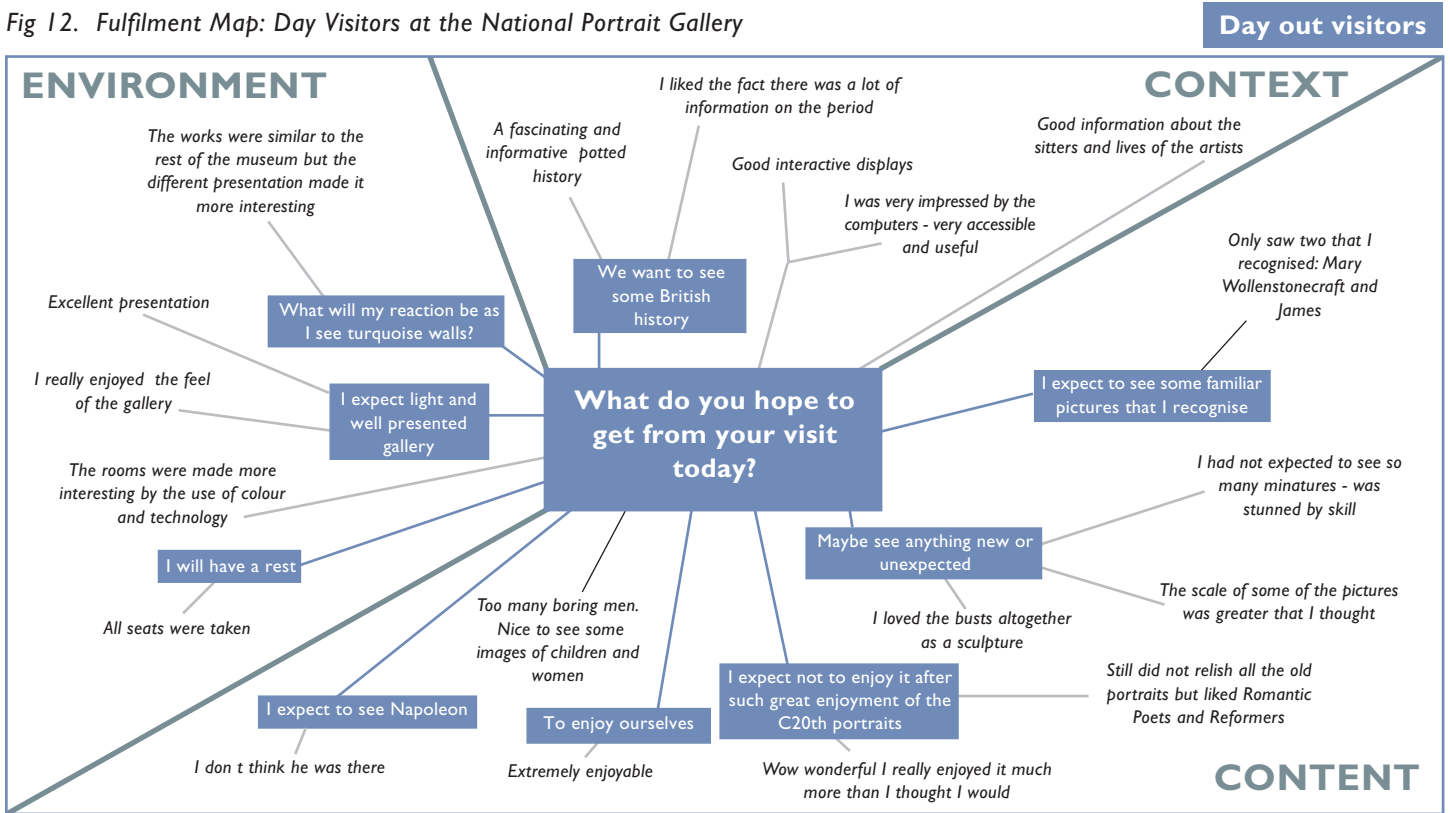
## Fulfilment maps

A simple exercise where visitors are asked on arrival to complete a quick 'mind map' in response to the question 'What do you hope to get from your visit today?'

This produces a list of visit expectations. They then return at the end of their visit to annotate this map and record the extent to which these expectations have been met together with any unexpected outcomes of the visit. The result is a

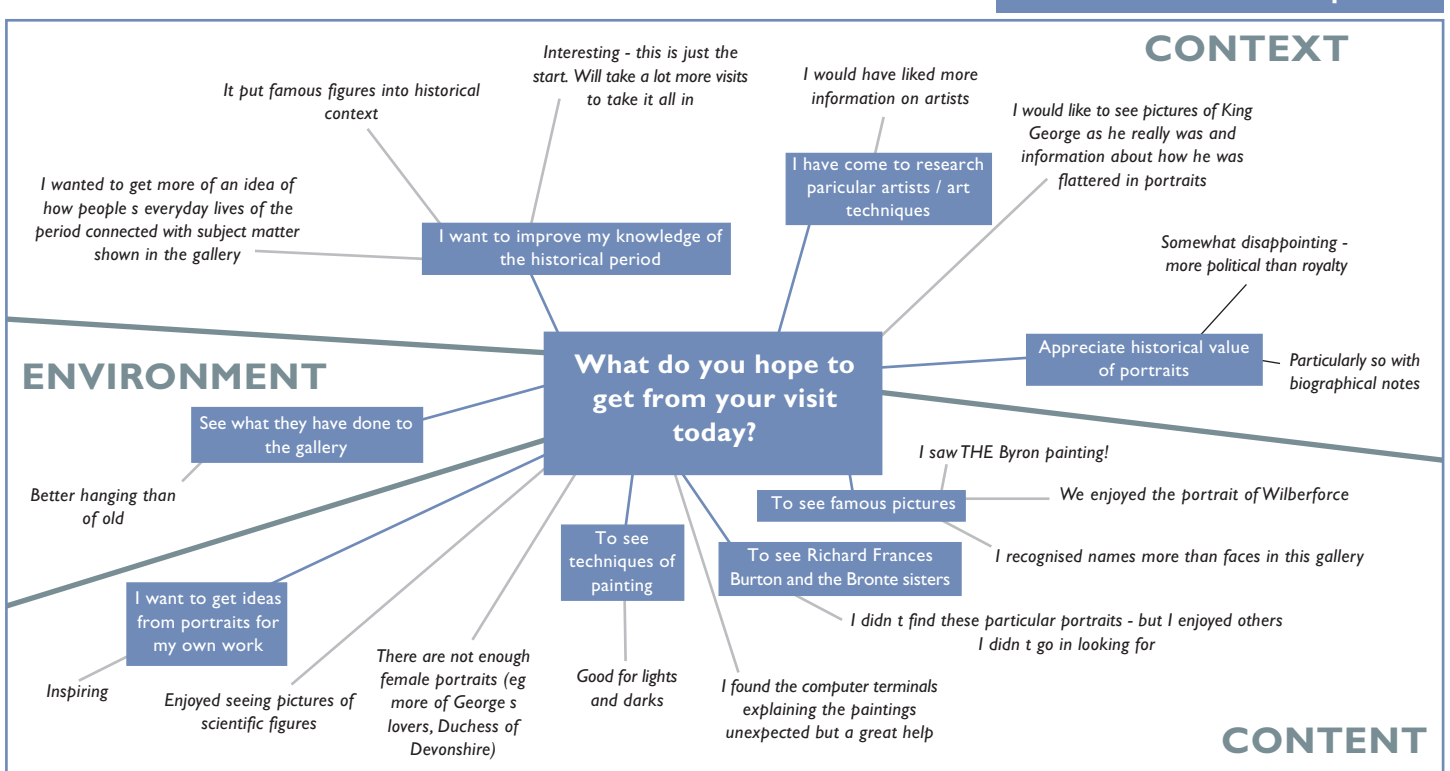
rich source of qualitative responses. This method can be structured to analyse by the visit content, context and environment and to probe for Generic Learning Outcomes. You can also compare and contrast the responses of different visitor types. Below are the analysed responses of two different groups, 'Day out visitors' and 'Researchers and Self-Improvers' at The Regency Rooms in the National Portrait Gallery:

Fig 12. Fulfilment Map: Day Visitors at the National Portrait Gallery



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Fig 13. Fulfilment Map: Researchers and Self-Improvers at the National Portrait Gallery



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## A final word

The survey questions, models and tools we have discussed in this document are all useful in their own right. But it is in combination that they are most powerful. They can tell us not only what is happening, but why it is happening. This goes beyond standard visitor research - it is real visitor insight.

These are just a selection of the tools we use and, working with some of the UK's most forward-thinking museums and galleries, we constantly modify and develop our methodologies as we tackle each museum and gallery and get to grips with each institution's unique circumstances.

We are grateful to the museums and galleries quoted in this research for allowing us to share their data with the sector. We hope that by sharing some of this material with you, we can stimulate an overdue debate about the future of visitor research.

We believe it can be better. We believe it can be richer. We believe it can be more meaningful. But more than that, we believe that national measures and performance indicators should not be set at the lowest common denominator. Instead, we believe that targets should be there to challenge and inspire us. If funders and sector professionals are to share common goals, then we need a common language to express them and meaningful measures to monitor our progress towards these goals.

We hope that this document is a step in that direction. We look forward to your responses.

Morris Hargreaves McIntyre  
April 2005

Morris Hargreaves McIntyre is a creative and intelligent arts management consultancy working in the interests of audience and organisational development. We are a growing company with a very strong track record in providing a fully-integrated, market-focused strategic planning service to the arts, underpinned by in-house research services.

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Tate Modern's Adrian Hardwicke describes Morris Hargreaves McIntyre's work as...

*"...the most sophisticated research project Tate has ever commissioned. It's given us a deep understanding of visitors and influenced everything we do."*

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