

## **Visitor Studies in Support of Exhibition Development**

Recently the Office of Policy and Analysis has become more involved in helping teams as they create new exhibitions. Some Smithsonian staff members have expressed interest in incorporating visitor studies more comprehensively and routinely in exhibition development. This document has been prepared to assist that effort. It summarizes the types of studies that can accompany and aid exhibition-making, and how they fit into the overall exhibition-making process.<sup>1</sup>

### **The Role of Visitor Studies during Exhibition Development**

During the development process exhibition-makers often find themselves in the position of having to estimate how visitors are likely to respond to a given idea, presentation, object, image, or text. It is notoriously difficult to predict audience impact accurately and reliably. Visitor studies during the development process can help to improve the accuracy of these guesses, but they are not flawless. As the commercial world demonstrates daily with market research, even the most sophisticated tests can miss fatal flaws as well as brilliant successes. Nonetheless, even if visitor studies are imperfect oracles, they invariably enrich the decision-making process and increase the likelihood of success.

Exhibition-making at the Smithsonian Institution nearly always takes place in the context of constrained resources, so any visitor study effort needs to be cost-effective. The suggestions in this document are offered in that spirit. Most of them are informal and simplified. Each could be expanded into a more rigorous, reliable, and expensive method. The choice and scope of these studies in a particular exhibition project need to be tailored to the requirements of that project. In general, the more expensive, risky, controversial, long-lasting or critical the exhibition is, the more visitor studies should be conducted as part of the development process.

The Office of Policy and Analysis is available to all Smithsonian museums to guide or conduct these studies as necessary or appropriate. Address inquiries or comments to Carole Neves, Director, Office of Policy and Analysis (202-633-8065).

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<sup>1</sup> This document assumes that studies are based on existing audiences. If the museum wants to investigate the possible responses of people who do not visit the museum, more expensive and involved methods are required, and results are much more tentative.

## Visitor Studies for Each Exhibition Development Stage

### Stage I: Idea Generation<sup>2</sup>

At this point in the process the museum is trying to decide what topics to pursue for exhibitions.

*Exhibition Idea Survey* A short, simple survey of possible exhibition subjects.

Format: Half-page handout with 3-5 exhibition ideas generated by museum staff, each presented in 1-2 sentences. The presentation resembles what visitors would be likely to encounter in a newspaper listing of museums and exhibitions. The list could include exhibitions under serious consideration along with some “long-shot” possibilities. Visitors are asked to rank or score on the basis of their level of interest in seeing each exhibition. The survey can be administered either to the general visitor population or to targeted audiences, provided that the samples are representative of those groups. Although these studies should be designed by the Office of Policy and Analysis, they could usually be administered by museum staff or volunteers.

Comment: This is a simple, short-term study, a kind of market research. It can provide a sense of how interesting a topic is and who is most interested in it. Since the items are presented as they appear in listings, a study like this can be important for exhibitions that the museum hopes would draw visitors who might not otherwise come. Although this method does not determine which exhibitions should be done, it can help to ensure that future exhibition ideas are likely to attract a range of visitors, or the particular type of visit that the museum has targeted. Some ideas that testing demonstrates do not appeal to many respondents, for example, might still be moved forward into concept development when they do appeal strongly to a particular target audience segment. The more topical the subject and the larger the exhibition, the less reliable the result, since public attention and interest would be likely to shift by the time that the exhibition could be produced.

Examples: OP&A is not aware of any studies of this kind conducted previously at the Smithsonian. Studies of this kind are typically done at museums with disciplined market orientations.<sup>3</sup> Some museums have made good use of more involved marketing studies, especially when considering a major renovation or change of direction, as at the Strong Museum in Rochester.<sup>4</sup>

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<sup>2</sup> The stages used here are described in the OP&A White Paper, *The Making of Exhibitions: Purpose, Structure, Roles and Process*. 2002. Smithsonian Institution, Office of Policy and Analysis. ([www.si.edu/opanda/Reports/WP.models.1021.zd.pdf](http://www.si.edu/opanda/Reports/WP.models.1021.zd.pdf)).

<sup>3</sup> See *Marketing Exhibitions: Will They Come?* 2002. Smithsonian Institution, Office of Policy and Analysis. (<http://www.si.edu/opanda/Reports/EX.Marketing.pdf>)

<sup>4</sup> The role of market research in the program of the Strong Museum is briefly described by the Institute of Museum and Library Services at [http://www.imls.gov/closer/archive/hlt\\_m0301.htm](http://www.imls.gov/closer/archive/hlt_m0301.htm).

## Stage II: Concept Development

Once an idea has been identified for further development, it is useful to know in greater depth what visitors know and think about this topic.

***Coded Excerpts of Visitor Interviews*** Interviews of visitors regarding the exhibition topic, analyzed according to the themes and patterns in the responses.

Format: Individual interviews with visitors in the museum. Discussion can be triggered by open-ended questions, short texts, or photographs. Interviews are very loosely structured and follow the interviewee's responses to better understand them. This method requires trained interviewers and analysts, and can be done by OP&A or by contractors.

Comment: This is most useful when done at the beginning of concept development. Depending on the topic, questions alone, text, or photographs will be more effective in eliciting detailed responses. In the case of an exhibition on polio, for example, questions alone and text yielded rich responses, but photographs did not. Conversely, in a recent study for the space exploration gallery at NASM, only photographs generated detailed remarks. As a result of this study the exhibition-makers should have a general idea of what visitors know and think about the topic.

Examples: OP&A did a study of this kind in support of the upcoming NMAH exhibition, *Whatever Happened to Polio?* A structured interview format was used for the baseline study of visitor attitudes to Native Americans that was prepared in anticipation of the new National Museum of the American Indian.<sup>5</sup> In a study for a possible photography exhibition, OP&A interviewed visitors using copies of the photographs intended for the exhibition.<sup>6</sup>

***Concept Evaluation Study*** An investigation of visitors' responses to the direction/approach chosen and elaborated during concept development.

Format: The type of study and the level of skill required to conduct it will depend on the nature of the topic and the depth of response that is required. It should be done by OP&A or a contractor.

Comment: This study is usually done when the topic or approach is known to be controversial (either within the museum or outside it) and the exhibition-makers want some assurance that their approach is likely to be successful.

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<sup>5</sup> *Images of Native Americans: A Background Visitor Study for the National Museum of the American Indian*. 1998. Smithsonian Institution, Institutional Studies Office. ([www.si.edu/opanda/Reports/Earlier/NMAI.Images-98-3.pdf](http://www.si.edu/opanda/Reports/Earlier/NMAI.Images-98-3.pdf))

<sup>6</sup> *Four Studies of Visitor Responses to Photography*. 2001. Smithsonian Institution, Office of Policy and Analysis. ([www.si.edu/opanda/Reports/Photography.pdf](http://www.si.edu/opanda/Reports/Photography.pdf))

Example: A study of this type was conducted by Smithsonian staff for the *Rock 'n' Soul: Social Crossroads* exhibition while it was being developed by NMAH for presentation in Memphis.<sup>7</sup>

### **Stage III: Design Development**

At this point the basic concept of the exhibition has been set and the team works on the script and design that will make it a reality.

***Tests of Alternatives*** This is useful when the exhibition team is having trouble deciding among alternatives and would like some visitor input.

Format: Brief, informal survey/interview studies in which visitors evaluate alternative ideas/objects/images/presentations. These can be done by in-house staff (provided that those who conduct the study are not strongly biased to one of the alternatives, and have the skills and training to do this kind of work).

Comment: This is most useful whenever the core team has a question about how visitors might respond to something that was not raised in the visitor studies conducted earlier.

Examples: Denver Museum of Science and Nature conducted a visitor study for a new Space Hall under development by showing visitors sketches of three different design approaches to the exhibition.

***Title Test*** A survey that compares the level of interest among alternative titles to the same exhibition.

Format: A short, simple survey of possible titles. Once a template is established, this is a one-day project that can be done by in-house staff.

Comment: Each visitor expresses a level of interest in one exhibition, but different questionnaires have different titles for that same exhibition. If the sample is reliable and the different questionnaires are randomly distributed, the result will indicate which alternative title generates the best response.

Example: OP&A conducted a title test for *Whatever Happened to Polio?* and verified that the tentative title was the best choice among available alternatives.<sup>8</sup>

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<sup>7</sup> *On the Road with Rock and Soul: A Study of Visitors to the Social Roots of Rock and Roll Preview Exhibition*. 1997. Smithsonian Institution, Institutional Studies Office. (<http://www.si.edu/opanda/Reports/Earlier/97-2-Rock.pdf>)

<sup>8</sup> *Polio Exhibition Title Test*. 2004. Smithsonian Institution, Office of Policy and Analysis. ([www.si.edu/opanda/Reports/polio.pdf](http://www.si.edu/opanda/Reports/polio.pdf))

***Design Prototyping*** Informal tests of design elements, texts, audio-visuals and graphics.

Format: Visitors are interviewed after examining rough full-scale mock-ups of structures, texts and images in order to identify problems in communication, understanding, etc. After minimal training this can be done by in-house staff.

Comment: This work can be done very quickly, especially if it is done with the active participation of designers who can test proposed solutions as problems are identified. Only the most serious problems are likely to be uncovered by this method. Obviously prototyping needs to be positioned in the design process at a point where correction is possible. In the ideal case, the most fundamental issues were investigated and addressed through ***Tests of Alternatives*** earlier in the design development process.

Examples: OP&A provided this service to the NMAH team for text and graphic panels in *Whatever Happened to Polio?* The work with visitors identified areas where text, images, diagrams and placement could be improved and confirmed the likely effectiveness of a number of design issues, such as the overall height and structure of major exhibition elements.

#### **Stage IV: Fabrication and Installation**

At this point (except in design-build projects) designs are completed and handed over to production to be executed.

***Production Prototyping*** Because some exhibition elements (such as interactives) are both designed and produced at the same time, prototyping also needs to be a part of fabrication.

Format: Same as ***Design Prototyping***.

Comment: In cases where the graphics for an interactive are being produced before the interactive itself, there may be a complex timing issue involved in coordinating the ***Design Prototyping*** and ***Production Prototyping***.

Examples: A prototyping stage was written into the contract for the interactives in the NMAH exhibition *Invention at Play*.

## Stage V: Post-opening Activities

This is the period when the exhibition is open to the public.

***Summative Evaluation*** This term describes a range of studies that can be conducted with visitors in the exhibition to determine their behaviors and responses.

Format: These studies fall into two classes: those designed to test hypotheses about issues such as use, communication, learning, satisfaction, etc., and those designed as open-ended inquiries into how visitors construct their responses. They should be conducted by outside specialists, such as teams from OP&A. If a need for corrections is established and funds are available, the design and production of the proposed alterations might involve prototype testing as well.

Comment: Unless there are plans and budgets for the revision of the exhibition after opening, summative evaluations support exhibition development only to the extent that their findings can be generalized or applied to future exhibitions.

Examples: OP&A conducted a thorough summative evaluation of the NMAH exhibition *The American Presidency* that involved three separate studies: an interview study, an observation study, and a survey study.<sup>9</sup> The interview study was an open-ended inquiry, the observation study mapped behavior in the exhibition, and the survey study tested hypotheses about learning, satisfaction, and design.

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<sup>9</sup> *Studies of Visitors at the American Presidency*. 2001. Smithsonian Institution, Office of Policy and Analysis. ([www.si.edu/opanda/Reports/TAP.pdf](http://www.si.edu/opanda/Reports/TAP.pdf)).