



Efficiency and Effectiveness of Government-sponsored Museums and Galleries

Measurement and Improvement

Visitor Information Excellence Study

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DCMS Review of the Efficiency and Effectiveness of the Government-sponsored Museums and Galleries

Appendix C: Excellence Studies – Visitor Information

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A. Executive Summary

Museums, as a sector, have not sufficiently recognised the importance of sound statistics. Either as a way to indicate their success in meeting their objectives or their position in an increasingly competitive leisure and education market.

Jeremy Warren, Assistant Director, Museums & Galleries Commission (1998)¹

In 1998, the Museums Association adopted a revised definition of the museum that received the full backing of the museum community. Whilst maintaining the importance of traditional collections-oriented activities, the new definition emphasises that museums are first and foremost about people. But, how many people actually visit museums, and who are they anyway? What motivates a museum visit, and what makes a museum visit successful? Why don't some people even consider visiting museums? Understanding the answers to these, and other questions, is becoming increasingly important. Over the past decade, several key reports on the potential development of the UK museum sector and its contribution to the wider tourism and leisure markets have highlighted the importance of visitor research to inform decision-making at all levels. These reports have identified a general "knowledge deficit" on museum users and non-users which is considered as a serious obstacle to the development and long-term sustainability of the museum sector².

This report proposes new developments to facilitate the collection and dissemination of visitor information between all state-sponsored museums and galleries and the potential uses of that information, identifying further areas for collaboration and co-operation. Above all, it develops a realistic methodological framework for the collection of visitor information which recognises the significant differences between institutions, whilst embracing the need for comparable and up-to-date information that informs policy and programming in a rapidly changing marketplace.

The report opens by suggesting a baseline of information required by all museums on their visitors, and evaluates the different methods of collecting this data. The baseline has been broken down into the following categories of information:

- attendance data;
- attitudes, motivations and expectations;
- basic demographics;
- physical use of the building; and
- visit quality and visitor outcomes.

Having established a baseline, the report outlines the most common uses of visitor information in museums. The following areas are most commonly benefiting from visitor research:

- marketing;
- audience development and access;
- public services and facilities planning;

- public programming;
- policy formation and corporate strategy; and
- benchmarking studies.

The next chapter considers collaborative approaches to the collection and use of visitor information, highlighting research projects from both within and without the museums sector, and looks at visitor research from a sector-wide perspective. Based on our research findings, the report concludes with a series of Next Steps Advice that highlight areas to develop and opportunities to explore in the collection and use of visitor information by state-sponsored Museums and Galleries in the UK.

Section 1: Introduction

1.1. Background and Status of this Study

LORD Cultural Resources (LORD) prepared this Excellence Study as part of the Efficiency & Effectiveness Review of the Government Sponsored Museums & Galleries commissioned by the Department for Culture, Media & Sport (DCMS). The study topic – Visitor Information – was chosen by the Review’s Working Group as a key activity for which the wider adoption of best practice was thought likely to yield significant benefits in efficiency and effectiveness.

This Study has been developed through iterative consultation with the National Museums and Galleries, through the comments of the working group and through a seminar. This document should be seen as a position statement contributing to the debate on Excellence within this area. It does not purport to be a guide, or manual, on excellence.

1.2. Study Objectives

In accordance with the Terms of Reference agreed by the representative of the DCMS Working Group, the following objectives were set for this study.

- To identify examples of good practice in the collection of visitor information;
- To identify examples of good practice in the use of visitor information;
- To explore the reliability and comparability of data;
- To ensure that progress in improving access and inclusiveness can be accurately tracked.

1.3. Definitions

For the purposes of this study the following definitions of the “visitor” have been used:

- Visiting user – general admissions to the building. No distinction has been made between visiting-users and academic-users.
- Non-visiting user – those people accessing museum provision and information through sources other than a museum visit. This report focuses on web-site use*
- Non-user – those people not visiting a museum site either remotely or in person.

The gathering and integration of visitor responses to a museum visit is not directly related to the measurement of success in its broadly educational missions and achievement of specific learning outcomes. Establishing whether a learning experience is taking place is obviously relevant to success, but this is an educational function, measured more specifically by museum evaluation programmes, and is therefore beyond the scope of this report. By implication, this includes the quality of display and interpretation. Of course, the quality of these elements can be measured using many of the techniques outlined below, but that process should be a function of evaluation. For the same reason, temporary exhibitions and outreach programmes are also excluded.

Given the time constraints on this report, several areas of off-site use have been excluded, but these may deserve further discussion to assess methods of information collection, its use, and its potential value. These include publications, merchandising and media coverage. They have also been excluded due to the difficulty in measuring the impact of these points of contact.

Section 2: Collecting Visitor Information

Before a museum embarks on a visitor research programme, it must ask itself what it wants to achieve with the research. As important as the quality of the information gathered may be, without an expectation of its use, there is little point in the exercise. The professional standards established in 1991 by CARE (Committee on Audience Research and Evaluation, American Association of Museums) are an excellent foundation on which to plan visitor research programmes.³

Official statistics must be sufficiently accurate and reliable for the purposes for which they are required. Efficiency is important here too, since quality has to be achieved within what is affordable.

HM Treasury (1998) Statistics: A Matter of Trust, February, p2

This section introduces the key user and non-user intelligence needed by museums, and is therefore recommended as a minimum standard. Regularly collected and analysed, this market intelligence will enable museums to uncover trends and target new audiences. The basic framework also encourages the systematic recording of motivations, expectations and user-outcomes, assessing the quality of the museum visit, and uncovering reasons for staying away.

2.1. Visiting Users

85% of nationally-funded museums have conducted user research in the past five years, as compared to 48% of museums across the whole sector.

Museums and Galleries Commission (1998) Museum Focus. 1997 figures.

The following five key areas represent the minimum information required to generate useful visitor data:

- attendance data;
- attitudes, motivations and expectations;
- basic demographics;
- physical use of the building; and
- visit quality and visitor outcomes.

2.2. Attendance Data

Attendance levels are the crudest indicator of performance currently being used by museums. Accurate visitor figures are important for a number of reasons:

- calculating the overall levels of demand for the museums sector;
- calculating cost per visitor and spend per visitor;
- compliance with security and health and safety standards;

- identification of attendance patterns when allocating resources; and the
- identification of trends.

Secure attendance figures therefore have implications for the comparability of many indicators of performance used by museums.

2.3. Collection Methods: Charging Museums

- Charging museums can keep accurate attendance data from ticket sales.
- The best automatic ticketing systems offer several categories of ticket allowing a basic visitor profile to be established on entry, thus calculating numbers of children, different groups, individual adults, family visits, senior citizens, students and the unemployed. Good after-sales care and training to use different systems are important.
- Visitors can also be questioned during the point-of-sale transaction to generate additional information that can then be added to the ticketing database. For example, measuring frequency of visits.
- Many charging museums offer free entry into shops and cafes, and these visitors will therefore not appear on ticket sale numbers. However, it is possible to issue a special category of ticket that allows such access.

Example of Good Practice – Art Gallery of Ontario (AGO), Toronto

Entry to the AGO is free, but operates a ‘pay-what-you-can’ scheme whereby every visitor gets a ticket. This has proved very successful through well-communicated motivations and a welcoming public face. The ticketing system is composed of two modules, the Admits and Access modules. Admits handles the process of selling and producing the ticket. When the ticket is offered to warding staff to gain access to the gallery or particular program, Access is triggered. Here entry time data can be recorded. Daily reports are run at the end of each day, tracking admissions, sales and other key statistics. Built into the report is a prompt requesting information about the weather and any other factor which may have impacted on attendance. Other, more detailed reports are produced on request by various user departments. Marketing, fundraising and visitor services are the most intensive users of the reports. The open architecture of the system allows it to be modified as needed, capturing any combination of data that is required. It is also easy to operate, processing tickets takes approximately 20-25 seconds. Front-of-house staff can add additional demographic data on request. Visitor flows can be monitored to a level of detail that has allowed the AGO to reduce the number of warding staff in certain rooms during certain periods. An unexpected benefit of the system has been reduced insurance costs. These have been adjusted as the AGO has been able to tangibly demonstrate the actual numbers of visitors at a detailed level.

2.4. Collection Methods: Non-Charging Museums

The situation is more complicated at non-charging museums that do not have the advantage of ticket sales to measure attendance. The reliability of much attendance data from non-charging museums has been discussed several times. This becomes increasingly relevant when

assessing the impact of removing admission charges. Issues of accuracy will be most significant at those museums receiving high levels of visitors. Non-charging museums that charge for temporary exhibitions can keep accurate records of the numbers of these visitors using the systems described above. Some of the methods of counting currently used are:

- **Continuous, manual ‘clicking’.** (These conditions can lead to potential problems of staff motivation and management). Due to pure numbers, inaccuracies are more likely in the larger museums. Museums receiving fewer visitors can be more confident of accurate data. Usually recorded by warding staff, their other pastoral and security duties also need their full attention. Continuous clicking can be very tiring during busy periods. However, properly managed manual ‘clicking’ can do a reasonably successful job.⁵
- **Magic-eye technology.** Numbers are logged when an infra-red beam across a threshold is broken. They are not generally directional, so numbers are usually halved when generating the actual number of visits. They perform poorly with large and milling groups, and have been known to even count bags as visitors.⁶
- **CCTV and motion sensors.** The use of cameras and movement sensors have several advantages. Industry standards are 95-98% accuracy. But due to costs, these are only a truly efficient use of resources at the larger museums with high attendance levels. These systems are directional, and so can be used for security and health and safety requirements, informing staff to limit access to overcrowded areas. Effectively adapting these systems to existing museum facilities can be difficult.⁷
- **Turnstile.** Visitors passing through a turnstile are counted individually, but this system, in common with others, does not distinguish same-day repeat visiting. Furthermore, wheelchair users and other visitors with special needs need to be counted by other means.

Examples of Good Practice –Wallace Collection, new developments at the British Museum

Having previously used automatic infra-red counting methods, visitors to the Wallace Collection are now counted manually, which is considered to be more reliable. Overall visitor numbers are low enough for accurate manual counting.

Concerned over the accuracy of continuous manual counting, the British Museum is studying infra-red counting systems as part of the Great Court Scheme. Sensors are to be placed above the main entrance, north entrance, and the entrance to the Round Reading Room. Three sensors above each threshold will be capable of registering the direction of visitors in or out, thereby greatly improving the reliability of this counting method.

These two examples show how different museums are utilising the most appropriate counting methods to suit their own circumstances.

2.5. Basic Demographics

Basic demographic information is an invaluable tool for understanding who museum visitors are. Discovering who your visitors are also identifies those groups not visiting your museum.

Often collected within a marketing function, demographic profiles can inform all areas of museum policy and programming, and a basic demographic baseline can be incorporated into many other visitor studies.

Baseline demographic information commonly includes:

- age;
- gender;
- ethnic background – best established using Census classifications developed by the Office for National Statistics;
- place of permanent residence;
- level of educational attainment;
- occupation/socio-economic status – although regarded by many a crude method of social classification, the ABC1C2DE system is preferred by market research bodies and is the first system used for simple market segmentation exercises; and
- special needs – including language.

2.6. Collection Methods: Broad-Based Visitor Surveys

Sampling is an important issue here. Some groups are conspicuous by their absence from visitor surveys, particularly children and those visitors for whom English is not their first language. Others excluded are those only on a short visit without time to stop, and family groups. The duration of the survey is also important, as is the sample size. Larger samples tend to be more statistically relevant. Too large and the statistical benefits become marginal. The survey should be representative of the opening times of the museum, with weekends and evenings included. A consistent approach to sampling ensures that a representative sample of a museum's visitors is canvassed, and when repeated in consecutive years, will enable staff to identify trends and measure performance in key areas.⁸

- **Self-select questionnaires.** There is no direct contact between visitors and the museum using this method, and there is no control over the sample. Only the simplest questions can be asked and the risk of deliberate or accidental inaccuracies is high. Surveys may also be returned incomplete. It is almost certain that the sample will not be representative in both visitor profile or time of use. For these reasons, results can be statistically unreliable and even invalid.
- **Surveys – structured and interview.** The structured and interview survey are related but very different techniques. A structured survey follows a set criteria of questions to ask and topics to cover. Interview-based surveys can generate more detailed information, particularly with open-ended questions that add qualitative information to basic demographics. Interview surveys are heavier on staff time and resources, but have the added value of personal contact with visitors, which is often appreciated by respondents. Planned correctly, both techniques will produce a sample largely representative of the audience. Both techniques are more reliable than self-select questionnaires.

- **In-house versus professional researchers.** The availability of resources is a key issue. Professional researchers are far more expensive, but often the results are more reliable. Time-scale is also important. Collecting, collating, analysing data and producing reports can be very time-consuming for museum staff with other responsibilities. External professionals are likely to be well-trained and experienced in collecting information, while in-house teams are likely to be less experienced may not have received an equivalent level of training. Museums need to consider planning a programme of surveys over a given time period, perhaps obviating the need to professional in-depth surveys every year. For example, every two or three years (see 2.1.3.1 and 4.2).

Examples of Good Practice – Powerhouse Museum, Sydney, Australia

In 1996/97, the Powerhouse Museum conducted a year-long study that surveyed over 3,000 visitors⁹. An exit-survey was conducted throughout the year and at different times of the week to ensure a representative sample of visitors were surveyed. Two questionnaires were prepared; one for residents of Sydney and New South Wales, and another for domestic and overseas tourists. Based on market intelligence, the questionnaires were translated into Arabic, Chinese and Japanese, and signs advertising the survey were also reproduced in these languages. However, even here the methodology could not deal with individuals in groups of any kind. The two questionnaires covered four broad categories: demographics; psychographics; experience and satisfaction. The study was designed to build up patterns of information about audiences through cross-referencing a series of data sets.

2.7. Attitudes, Motivations and Expectations: Psychographic Analysis

Museums now need to discover the reasons why these particular people chose to visit. Various studies have concluded that finding out why people do not visit museums is easier to establish than the motivations that encourage visiting. Psychographic analysis provides the missing link in assessing different levels of demand and interest in a museum, and therefore its potential for achieving its specific goals. Combined, the who and why establishes what one author has termed, the “visitor commitment dimension”.¹⁰

Several general attitudinal and participation surveys have been carried out over the years to discover the motivations and expectations of visitors and non-visitors to the generic museum and have provided important insights¹¹. Expectations and motivations inevitably impact on the perceived success and quality of the visit and therefore need to be understood by individual museums.

Information useful to know:

- interests and preferences in a range of leisure activities;
- interests in visiting the museum today/purpose of visit;
- ranking influences related to the decision to attend today;
- actual and preferred times for attendance;
- actual and preferred visiting group;

- how long does the visitor plan to stay;
- image of museum prior to visit;
- did the visitor think it was a place for others, not for people like him/her;
- sources of awareness: e.g. media consumption, particularly newspaper readership;
- frequency of visitation; and the
- visitor's method of transportation to the museum.

2.8. Collection Methods: Broad Based and Specific Surveys

Broad-based techniques have already been discussed in relation to basic demographics. Specific survey techniques are analysed below.

- **Surveys – structured and interview** – see above
- **Focus groups** – typically of between six and twelve people sharing similar characteristics and identified from more general survey work. These enable a more detailed exploration of issues that can follow the visitor's agenda and interests. Focus groups do not require sophisticated statistical work or databases. The interviewer needs to be skilled to explore issues without prejudicing the respondents' answers. The technique can be time consuming and thus costly. One of the most revealing of research methods, it is often felt to empower participants.

Examples of Good Practice – Art Institute of Chicago

The Art Institute of Chicago has developed a three-year Audience Research Cycle¹². Each year, a specific visitor research programme is conducted as part of this cycle. The Art Institute employs more detailed techniques and smaller samples to look at particular user segments. For example, in-gallery observations, interviews, and focus groups from specific audiences.

2.9. Physical Use of the Building

Having accurately calculated how many people are visiting the building, their motivations and expectations, it is now important to establish how visitors use the building. This information provides evidence of visitor flow and can identify actual or potential problems of way-finding and orientation. Analysing circulation can uncover pinch-points and acts as a very crude indicator of the relative popularity/accessibility of different spaces and the usage of various facilities. Estimating the number of shop visits as compared to sales would also provide evidence of penetration for retail operations.

A baseline of information could include:

- use of facilities;
- use of displays and public programming provision;
- length of visit; and
- visiting group size and nature.

2.10. Collection Methods

- **Surveys – structured and interview – and empirical experience.** Recall of movements offered by respondents to surveys are liable to inaccuracy or lack of detail. This is relative to the size of the museum, and the number of different spaces that visitors will move through. Nevertheless, surveys will generate data from larger sections of the audience than other methods. The structure of questions asked – whether closed or open, self-select or interview – will also effect the reliability and detail of data. Complemented by observational studies, survey results can be compared directly to experience. Use and opinion of facilities (shop, cafe, toilet etc.) can be surveyed with some confidence with this method.
- **Observation studies.** Experience shows that what the public says, and what it does, can be very different things. Tracking a visitor from entrance to exit can be extremely revealing of the museum experience. Observers should be careful not to impede or affect the visitors' experience in any way. Timed observation will also increase the accuracy of estimations of length of stay. Due to the length of time required for each study, information is gathered on far fewer visitors, but this information is more detailed than visitor surveys, and gives the researcher information collected without visitor bias. However, observational studies do not explain audience behaviour, which relies on interpretation.
- **Audience advocates.** Members of staff actually going round a museum with a visitor or group of visitors can observe circulation more closely. This approach is different from observational studies in that the staff member is known to the visitor. Advocates must not influence the visit in any way. Again, such studies are heavy on staff time, but considered very valuable.
- **Automatic visitor tracking systems.** CCTV can be used to count the numbers of visitors in specific rooms or galleries at any one time, and also identify specific circulation problems.
- **Mystery shoppers** – paid researchers that visit an attraction as a visitor to assess aspects of service provision, primarily visitor services – more a tool for evaluating services.
- **Smart card.** Recent trends include the use of smart cards to measure use of exhibits, particularly in science museums and theme parks.

Examples of Good Practice – Science Museum, retail sector developments, South East Museum Service (SEMS)

Audience advocates at the Science Museum advise colleagues on developments within the museum from the visitor's perspective. Accompanied visits gave inexperienced staff an opportunity to follow school, family and adult groups around the museum, learning from the visitor experience of a building, its displays and facilities.

Sophisticated visitor tracking systems have been developed in the retail sector. One company offers a complete tracking system to shopping centres. Providing an accurate picture of pedestrian activity, automatic monitoring facilitates quick decision-making on staffing levels, and the success of marketing and advertising strategies. A complete shopping centre analysis monitors total numbers of customers, and the numbers of customers in individual stores, and even departments of individual stores. Numbers and times of visits assist trend forecasting, centre layouts, staffing

profiles and letting policies, marketing policies, and building management systems (energy efficiency). Flow patterns and bottlenecks can also be identified by cameras.

In collaboration with the MGC, SEMS conducted a physical needs interview-survey in 20 London museums of various types and sizes.¹³ The fieldwork was conducted by students from the City University. Among other things, the survey looked into the use of signposting and information, visitor comfort and convenience, access between levels, and use of catering and toilets facilities.

2.11. Visit Quality and Visitor Outcomes

Museums cannot be judged on statistics alone, however rigorously collected. At their heart, the 'product' that museums offer does not operate within a point-of-sale culture, and achieving a 'sale' or visit does not, of itself, equal a success. Ultimately, a successful museum visit is measured qualitatively through visitor outcomes.

Whilst the quantitative data will be useful...often it is the qualitative findings which prove most significant in clarifying key issues and informing strategic priorities (e.g. perceptions of the cultural sector and what the gaps and barriers are).

DCMS, Guidance for Local Authorities on Local Cultural Strategies, Consultation Draft, 8th February 1999, p22

More than any other potential benchmark that can be extrapolated from visitor information, the quality of the museum experience is the most significant criterion for judging success from the visitor's perspective. However, this evidence is the most difficult to quantify and compare. Unrecorded anecdotal information is no longer sufficient in an increasingly competitive and sophisticated leisure market. Experience needs to be collected systematically to be of real use. Positive word-of-mouth is accepted as the most effective marketing tool available to museums. Thus, providing a fantastic experience for visitors will not only encourage repeat visits, but also attract new or infrequent visitors. What should be the criteria of a successful museum visit? The following represents a baseline of information common to museums of all types. The visitor:

- wants to return to the museum/is a repeat visitor;
- feels welcome;
- will tell friends and family about the visit, and encourage their participation;
- is stimulated to learn more about something experienced during the visit;
- feels the museum offers value for money;
- can express how enjoyable the visit was;
- can express their level of satisfaction;
- can express how good the museum is; and
- can express the extent to which their expectations of the visit were met.

Rating levels of enjoyment, satisfaction and how good the museum was perceived to be offers a more effective measure of visit quality than relying on a single satisfaction rating. Visitors can still think a museum is good, without having had a particularly successful visit, and vice versa. The ability to cross-reference each response in relation to other data will also be more useful.

2.12. Collection methods

- **Comments books.** Many museums use comments books. Whilst the information can often be interesting and of use, there is no control over the sample, its profile or its size. Comments are limited in length and detail. However, motivation to comment on a visit, either positive or negative, should not be underestimated. Comments books can be used to compare against other, more representative research techniques.
- **Comments forms.** These offer scope for longer comments, often committing the museum to respond (complaints/queries) within a given time-period.
- Observation and audience advocates – see above.
- Surveys – structured and interview – to be carried out at the end of a visit – see above.
- Focus groups – to be carried at the end of a visit – see above.

Examples of Good Practice – ‘social auditing’ developments in the library sector,

The recent report, New Measures for New Libraries, has developed a framework for measuring the social and economic impact of public libraries: a more sophisticated approach to measuring value and outcomes. The report demonstrates that qualitative, “real world” data, systematically collected, are valid evidence and should be treated as such. A whole range of stakeholders were consulted through interviews and focus groups in two very different local authorities, Somerset County Council and Newcastle City Council. Users and non-users, staff and local councillors were all included.

2.13. Non-Visiting Users

Fundamentally a marketing tool, museum web-sites are rapidly developing, offering tours of buildings and collections, special exhibitions and educational materials and activities, all of which increase access at a meaningful level. These developments have particular consequences for those on-line visitors geographically remote from the host museum. The issues surrounding the collection and use of on-line visitor information are essentially the same as those visitors passing through the museum’s doors.

2.14. Hit and Miss

Software used to calculate the number of individual visitors to a web-site is reliable and accurate. However, confusion over terms can easily misrepresent figures. Each web-page is made up of several electronic files. As a web-page or ‘page impression’ is accessed, each of these files is recorded as a ‘hit’, therefore artificially inflating the actual number of visits to that page. Peter Varlow, Head of Visit Britain, the British Tourist Authority’s award-winning web-site, has calculated a ratio of 1:10 page impressions to hits. Therefore, recording the number of page impressions accessed is far more useful to museums.

Software is available to track the on-line visit, recording which pages and information are accessed, and how long the visitor uses the web-site for. Samples of these data can be retrieved to analyse use of the site.

2.15. Basic Demographics

Virtual visitor research, generating similar information as described above, will become increasingly important for museums planning their web-site strategies and on-line service provision. By what mechanisms can museums research their on-line audience?

- **Registration tools** – a questionnaire which visitors fill-out with personal details as they enter a site. This provides information used for marketing and advertisers. Registration can be either optional or required.
- **Required registration** – to remain free, many sites require visitors to register, which only then gives access to the site. Some see this as a barrier to virtual access. Registration questionnaires should be concise, with reasons for gathering this information clearly stated.
- **Optional registration** – gives visitors the option to register if they so wish. Given the option, it would appear that only a very small sample take up the offer, compromising its status as a representative sample.

Examples of Good Practice – Daily Telegraph, and Visit Britain

To view the pages of the on-line Daily Telegraph, visitors must first register, volunteering personal details such as address, occupation, date of birth and gender. It is made clear that in order to maintain a free service, advertisers and sponsors need to see market data and usage of the site. The on-line Daily Telegraph has more than one million registered users, 55-65,000 daily readers and 500-600 pages are requested each day.

Visit Britain allows users to register optionally. Only 2-3% of its visitors (over 1.5 million annually) have registered, but it is felt that the statistics accurately represent those with the greatest commitment. Audits of the sites log-files can be conducted for advertisers and generate visits per month and pages accessed along with demographic details.

2.16. Virtual Outcomes and Web-Site Evaluation

- **Exit interview** – brief questionnaire surveys that appear as the visitor exits the web-site. Depending on the detail and length of the survey, response rates of 20-50% have been achieved.¹⁵ Personal details could also be left for future survey work and on-line and postal marketing.
- **On-line focus groups** – significantly, on-line focus groups lose the non-verbal side of group behaviour, and are therefore questionable as a research tool.

Other forms of off-site use have not been included in this study. Media coverage, such as broadcast and print, and publications and merchandising will need to be tracked using other more industry-focused approaches. However, one example of a co-ordinated approach to the collection of this information is provided by the Tate Gallery – see Excellence Study (4.2), below.

2.17. Non-Users

Essential to the long-term sustainability of a museum is the creation of new audiences, and the broadening of existing ones. Research into visiting users will identify those sections of the public under-represented or not represented at all in a museum's visitor profile, and should be considered as the first step in the identification of non-user groups. However, this will only tell you the who, not the why. Widening access is not the same as increasing attendance and is not a short-term measure but a long-term strategy. Non-user research should no longer be considered a luxury. However, there is still relatively little work being done in the area.

45% of nationally-funded museums have conducted research into the needs/views of non-users in the last five years. This compares with 20% of all museums.

Museums and Galleries Commission (1998) Museum Focus. 1997 figures.

2.18. Attitudes, Perceptions and Expectations

Reviewing previous studies can identify the broad issues involved, and when looked at in relation to a museum's own visitor research, potential areas of concern can be identified. What do museums need to know about non-visitors? Many of the areas of investigation will be similar to those enquiring into the attitudes and perceptions of visiting-users. Areas covered should include:

- interests and preferences in a range of leisure activities;
- to what extent these preferences are shared with friends and family;
- identification of any specific reasons for non-participation, i.e. cost, time, geography;
- sources of awareness of the particular museum/generic museum;
- image of the specific/generic museum;
- what do non-users perceive to be the barriers to museum visiting; and
- how have negative images of museums, or a particular museum, been formed?

2.19. Collection Methods

- **General household surveys** – taking representative samples of the population and asking a long series of questions that include lifestyle and leisure choices. Not relevant for individual museums, but useful for estimating sector-wide perceptions, attitudes and demand levels.
- **Time-use surveys** – used to measure use of time over set periods using diaries. Again, not useful for individual museums and are not generally considered useful for the cultural sector as a whole due to the short-length of studies (often a week). Useful for more specific activities such as television viewing habits.
- **Surveys** – structured and interview – see above, after having identified non-visiting groups from visitor research

- **Focus groups** – see above, after having identified non-visiting groups.

Examples of Good Practice – Museums and Galleries Commission, London Museums Consultative Committee

In 1997, the MGC commissioned a report on cultural diversity, and looked at reasons why ethnic minority groups are under-represented in museums. Half of the participants were non-visitors, and half were visitors. Focus groups were used exclusively, and contained a mixture of social grades. All participants were aged 25-50, and had children of school age¹⁷.

In 1991, the London Museums Consultative Committee sought to highlight the factors that discourage museum visiting. Previous surveys had identified those groups least likely to visit museums. A programme of qualitative research was carried out into six different groups. General leisure interests, attitudes to museums, appeal of concepts for displays, designing a local museum and sources of information were all covered by the research¹⁸.

Section 3: Using Visitor Information

The ultimate use of visitor information will depend greatly on the specific aims of the institution, and the objectives identified for the research at the planning stage. However, the following represents the most common use of visitor research within museums today:

- marketing;
- audience development and access;
- public services and facilities planning;
- public programming;
- policy formation and corporate strategy; and
- benchmarking studies.

3.1. Marketing

Visitor research is often located within, and generated by, the marketing departments of museums. Marketing remains the most common activity that benefits from visitor research because by its very nature it looks beyond the museum walls at visitors and potential visitors¹⁹. According to *Sightseeing in the UK*, in 1997, 39% of tourist attractions gave improved marketing as the reason for increased attendance, and 49% for attractions surveyed by the *Heritage Monitor* in 1998²⁰. The importance of effective marketing on success has recently been emphasised by benchmarking studies from the tourism sector (see below).

Examples of Good Practice – British Tourist Authority, RAF Museum

Informed by market research, the BTA have used market segmentation techniques to target products to different overseas markets. For example, the Grand Tour of Britain's Hidden Treasures is targeted at 25-45 year-old DINKS (Double Income No Kids) in Europe, and 55+ empty-nesters in the United States, Australia and New Zealand. Sales of the Great British Heritage Pass (45,000 world-wide in the last year) produce data on individuals that can be entered onto a database and used for further marketing programmes.

Surveys at the Royal Air Force Museum have identified other museums visited. A dialogue has opened up discussing the possibility of shared ticketing with these institutions.

3.2. Audience Development and Access

New standards for access recently produced by DCMS have ensured that visitor research plays a key part in the identification of excluded groups²¹. Monitoring basic demographic data is vital to measure the relative success of audience development programmes and efforts to tackle social exclusion.

Examples of Good Practice – Tyne and Wear Museums Service

Tyne and Wear Museums Service has long been recognised as a leader in the field of combating social exclusion. Integral to all service provision at Tyne and Wear, social inclusion is supported by a clear and coherent Access Policy that has been formally adopted into the service's Corporate Plan²². Visitor data from 1997 have been compared to research carried out in 1989²³. Socio-economic data demonstrates the success of the policy, showing an average increase in the numbers visitors from C2DE categories.

The wider social value of museums, and the impact of this on issues of exclusion, could be monitored qualitatively using social auditing techniques, an example of which, New Measures for New Museums, is referred to above (page 10).

3.3. Public Services and Facilities Planning

It is generally perceived that museum visitors have higher expectations of the public facilities offered by museums, drawing on their experience of other leisure attractions and shopping centres. More qualitative, detailed research can uncover areas of concern with museum shops, toilets, seating and restaurants and other front-of-house provision.

Examples of Good Practice – British Museum, and Tate Gallery

Visitor surveys at the British Museum have helped in planning improved foreign language provision, school lunch facilities and facilities for disabled visitors.

Developments at the Tate Gallery of Modern Art will be informed by market research conducted into specific groups. For example, provision of increased seating for 55+ visitors- see Excellence Study (4.2).

3.4. Public Programming

Public programming – displays, exhibitions, events – remain the most obvious expressions of a museum's individual philosophy, and its most sustained form of contact with its audience. As a communication tool, public programming needs to be informed by its audience. The increased use of interactives and hands-on has been informed in no small part by visitor expectations and experience elsewhere. More specific evaluation is not discussed here, but broader visitor research can provide much information relevant to programming.

Examples of Good Practice – Museum of London , Tate Gallery

An explicit aim of the Peopling of London exhibition was to broaden the Museum of London's audience, particularly amongst London's ethnic minorities communities. Museum staff, regular visitors and first-time visitors were used to plan the exhibition through in-depth interviews and focus groups. Previous museum visitor surveys were used to identify those groups not well represented at the Museum and then they were targeted.²⁴

Tate Inform – the gallery's audio-guide developed from a Visitor Audit – see Excellence Study (4.2).

3.5. Policy Formation and Corporate Strategy

If collecting detailed visitor information is to contribute to the long-term sustainability of the museum, enabling a responsive and proactive approach to changing visitor needs, it will be

used to inform policy-decisions and strategic planning. The strategic positioning of visitor research within the museum will also be important to its effective use.

Examples of Good Practice, The Australian Museum, Sydney

Visitor Studies at the Australian Museum in Sydney have contributed to a cultural change in management processes²⁵. Emphasising the importance of developing “industry-foresight”, evaluation of performance is now considered directly in terms of visitor experiences and values. A set of objectives were developed that focus externally on the visitor, underlining a responsiveness attitude to visitor needs. These objectives inform service delivery throughout the museum. A four-stage model has been produced that positions knowledge of visitors, their needs and expectations, at the heart of policy.

3.6. Benchmarking Studies

Several museums have become involved in benchmarking studies, both on a local and national level. Benchmarking studies collect information from a number of institutions, with performance in specific areas measured by comparison with the highest performers. This approach can identify examples of best practice in many areas of service provision. Benchmarking tends to be used as a purely quantitative approach to service comparison. Tomorrow’s Tourism, the DCMS’s tourism strategy paper, has encouraged the development of quality benchmarking within the tourism sector.²⁶ The advantages of collaboration and co-ordination are discussed in further detail below.

Example of Good Practice – Hampshire County Museums Service

During the summer months of 1998, nine museums in Hampshire were involved in a pilot benchmarking study. Fort Nelson and the Royal Navy Submarine Museum took part. A whole raft of surveys were completed by outside consultants, including individual health-checks on specific areas, and these produced individual reports for each museum with a series of recommendations for improvements to the service. It is hoped that the project will be repeated this year across the whole region.

3.7. Potential Uses of Visitor Information

To establish the viability of developments within the museum sector, the impact of new, mainly Lottery-funded projects needs to be assessed. In its national strategy paper, the Scottish Museums Council (SMC) has recommended a co-ordinated approach.

It is misleading to herald museums as engines of long-term economic regeneration without more systematic evaluation of the impact of new facilities. A co-ordinated research programme jointly between SMC, the Scottish Tourist Board, Scottish Enterprise and Highlands & Islands Enterprise to evaluate impact should be a priority.

Scottish Museums Council (1999) A National Strategy for Scotland’s Museums, p11

But this is also true from the visitor’s perspective. What effect will these new facilities have on visitors, their attitudes, motivations and visit experiences? The social, as well as economic impact, needs to be understood to measure success and inform future developments.

Section 4: Excellence Studies

4.1. The National Museums & Galleries on Merseyside

In 1991, the National Museums & Galleries on Merseyside (NMGM) set up a Research Office to co-ordinate an increasing amount of visitor research. Today there are two full-time staff members allocated to visitor research. Broadly, one concentrates on exhibit evaluation, whilst the other collects market intelligence from a wide-range of sources including tourist boards, the Office for National Statistics, and other museums and representative bodies. Since 1991, the Research Office has completed numerous in-house research and evaluation programmes and commissioned many others from external research companies.

4.2. Collecting Visitor Information

- The measurement of attendance levels before the extension of charging across all sites in July 1997 (Merseyside Maritime Museum, Museum of Liverpool Life, Conservation Centre already charged) used a variety of methods, including magic-eye technology, hand-held tally counters and ticket sales. Magic-eye counts would be audited using manual counting methods.
- The measurement of attendance levels since July 1997 used sales of a season ticket, the *NMGM Eight Pass*. Using the *Eight Pass's* unique serial number, a data capture system allows the tracking of an individual's visit-history across all eight venues. Repeat visits are added to *Eight Pass* sales to give the Visit Count. The ticketing system has built-in marketing functions. A geo-demographic classification system tracks visitors by postcode. On purchase of the *Eight Pass*, visitors have the option of completing a tear-off slip, volunteering their name and address, thus building a visitor database.
- Access is free to public areas such as shops and cafes at several venues. NMGM estimates these numbers to assess how many non-using visitors they are failing to attract into the main displays. These total 'estimated threshold visits' are calculated by manual counting of all visits at the Conservation Centre. Elsewhere, a percentage of the Visit Count is used to calculate the total number of estimated threshold visits. This percentage is checked twice-yearly by using manual counting methods.
- The overall NMGM visitor profile is measured every three years by a cross-venue visitor survey, most recently in February 1998. The profiles of each museum can then be compared directly together. NMGM uses several methods to collect information including surveys, focus groups, mini groups, and observations. Quality of visit is gauged during research by a rating scale. Three of NMGM's venues formed part of the annual ALVA Benchmarking Survey (Liverpool Museum, Walker Art Gallery, MMM).

4.3. Using Visitor Information

- Attendance is monitored on a monthly basis by NMGM's Business Monitoring Group, to assess performance against set targets.

- Recently visit histories have been used to assess which temporary exhibitions are selected for future programmes on the basis of business returns.
- Concerns over the number of non-paying visitors at the Museum of Liverpool Life led to an audit of total visits using manual counters. This exercise discovered that many visitors were able to by-pass purchasing an Eight Pass and enter unchallenged, and led to the tightening of security in the museum's foyer.
- Market research was extensively used to aid decision-making on pricing levels and the content of the *Eight Pass*. Exit surveys carried out in August 1997 measured the visitor response to the extension of charges that had occurred only a month previously. Demographic analysis of visitors was also included, and compared to previous surveys.
- Each research project is reported and key data are disseminated across all divisional and departmental heads.
- Quantitative and qualitative non-visitor research was carried out in 1997 to provide an estimate of the potential market penetration of the NMGM 2001 project. All relevant research is included in applications to funding bodies, for example the Market Assessment Section of the NMGM 2001 Heritage Lottery Fund bid. Obtaining sponsorship is also assisted by market information.

4.4. Tate Gallery of British Art

Visitor research at the Tate Gallery is co-ordinated by the Communications Department. There are no dedicated members of staff responsible for carrying out research as it is felt more reliable to bring in professional researchers to collect and interpret data. Visitor Audits at the Tate receive cross-departmental support and input, with staff consulted on all areas. This strengthens the validity of the report internally, and has led to the recognition of visitor research among key decision-makers. Visitor Audits are reported by the Tate in its Biennial Reports.

4.5. Collecting Visitor Information

- Quarterly MORI surveys are conducted to monitor the profile of visitors to the Tate.
- Every two years the Gallery commissions a Visitor Audit that focuses on different areas. Two have been completed since 1993/4.
- The first Visitor Audit, completed in 1996, investigated all aspects of the Tate's visitor services, focusing on signage, orientation, interpretation and information²⁷. The Audit employed a full range of information gathering techniques: observations, interview surveys, focus groups, and key informant interviews with Tate staff directly serving the public. The Audit also recorded visitor expectations and motivations. Throughout the fieldwork process, three researchers were used to cross-check the validity of findings.
- All aspects of the Tate Gallery's activities outside its walls, publications, merchandising, web-site and its mail-order facility, Tate magazine and touring exhibitions are monitored by Tate Elsewhere, a separate initiative within the Gallery.

4.6. Using Visitor Information

- Attendance levels are recorded each week. Patterns inform the promotion of exhibitions at non-peak times, and the encouragement of midweek visits.
- Visitor movements were tracked during the first Visitor Audit, with researchers following individual visitors. This was very useful in terms of information provision and led to the development of *Tate Inform*, the gallery's audioguide.
- Visitor Audit 1 also contributed to improvements in advertising, signage, and information delivery, particularly in the communication of the New Displays programming.
- Visitor Audit 2 focused on developing three specific audiences (see below) in terms of programming and visitor services. Findings will be incorporated into provision for the Tate Gallery of Modern Art, currently under construction at Bankside. The research included both visitors and non-visitors.
- MORI surveys identified three under-represented market segments; culturally active over-55s, families, and 18-35 ABC1s living in London. These groups were targeted by the second Visitor Audit, completed in 1998.
- MORI surveys also track the effectiveness of marketing and the development of new audiences, with implications for the use of marketing resources.

4.7. UK Libraries Sector

UK libraries represent a co-ordinated sector-wide approach to detailed research, publication and dissemination. The two main bodies collecting information on the libraries sector are the Research and Innovation Centre (RIC), and the Library & Information Statistics Unit (LISU). The Research and Innovation Centre has recently moved from the British Library, now forming a department of the Library and Information Commission (LIC). Set up in 1995 by DCMS, the LIC provide a national source of expertise on all issues relating to the libraries and information sector.

In 1997, LIC commissioned an important research paper, *Developing a Research Strategy for the Library and Information Sector in the United Kingdom*.²⁸ This report made several recommendations, and has informed a new strategy paper that continues to be regarded as a 'live' document.²⁹

An Action Plan in five critical areas of research infrastructure is proposed:

- forward planning of research;
- funding research;
- assuring the quality of research activity;
- communicating information about research; and
- transferring research into practice and policy.

The transference of research into policy-making is being developed by the LIC, and is looking specifically at partnerships between the academic community, practitioner community, policy-making community and users. Activities of the Research and Innovation Centre now fall into eight major programmes:

- value and impact;
- digital libraries;
- information retrieval;
- management of libraries and information services;
- library co-operation;
- providers and users of information;
- preservation of and access to the recorded heritage; and
- public libraries.

One of the main reasons for the Research and Innovation Centre's transfer to LIC was an attempt to create a synergy between research and policy. RIC receives all its funding directly from DCMS, and research is commissioned throughout the year on a wide-range of topics. For example, current work being done on the value and impact of libraries include studies on access to libraries for life-long learning, library-based homework clubs, public libraries and social exclusion, and the economic value of public libraries.

LISU is a research and information centre, part of Loughborough University's Department of Information, and generates statistics about library and information work. Its regular annual publication, *LISU Annual Library Statistics* features trend analyses of UK academic and public libraries. LISU also offers a "Tailor-Made Statistics" service for UK public library authorities that produces statistical trend analysis and comparisons, providing key information to library managers. LISU receives around 45% of its funding from the Research and Innovation Centre; the rest is made from publications and consultative services.

LISU Annual Library Statistics are generated by returns made to the Chartered Institute of Public Finance and Accountancy (CIPFA), that all public libraries have to comply with. This provides management information data. A second strand of information is also being produced through user-surveys, the most common of which measure satisfaction levels. An area that has increased in popularity over the past ten years, standard satisfaction surveys are being produced and used throughout library services, and offer comparable data. Over half of all public library authorities have signed up to the survey developed by CIPFA.

David Spiller, Director of LISU, suggested that research is worth doing only if it is centrally pooled, to avoid attempts to re-invent the wheel.

Libraries are extending and diversifying beyond their traditional roles, but continue to occupy the grey area of public service provision, combining useful purpose with pleasure. A review of recent research champions the library as an agent of social change, on both a personal and community basis, stressing the importance of a learning, knowledge-based society to Britain's future development as a whole.³⁰

An increasing amount of research is being carried out into the social impact of libraries, some developing qualitative techniques and methodologies to measure social value.

Section 5: Reliability and Comparability

There remains a real danger of museums needlessly re-inventing the wheel, wasting precious resources on research programmes proven redundant elsewhere, and producing non-comparable data of little use to others, whether locally, regionally or nationally. A major task of this report has been to identify minimum standards of visitor information that will produce reliable data and data that is comparable across different museums. By implication, the information produced will be incredibly useful for the whole museum sector, all funding bodies and many other stakeholders. To make the most effective use of this information, its collection will need co-ordination. Coordinated research demands data comparability through the synergy of collection methods.

The next section introduces research projects and strategies that provide examples of the potential benefits of a coordinated approach to the collection and use of museum visitor information, and identifies an emphasis on coordination and cooperation encouraged at a governmental level. Initiatives are grouped under the scope of the project:

- regional;
- sector-wide;
- national;
- European; and
- attempts to create methodological frameworks.

5.1. Regional

5.1.1. East Midlands Museums Service

Over a twelve-month period from June 1994 to June 1995, East Midlands Museums Service (EMMS) conducted a major market research project. The research was in two parts; a museum visitor survey, and a museum market survey. The visitor survey was conducted at twenty museums chosen as representative of those museums operated by public sector bodies in the EMMS region. Over 1,600 people were surveyed using structured questionnaires during a twelve-month period (adults only).

The market study was conducted in eighteen East Midlands town centres. This survey aimed to establish leisure activities, perceptions of museums, awareness and use of selected museums and the levels of museum visiting across a random selection of pedestrians. Over 750 interviews were conducted in eighteen towns. The fieldwork for both studies was managed by the East Midlands Tourist Board, and EMMS published the research findings in a 1996 report, *Knowing our visitors*.³¹

5.1.2. North East Museums Service

Having recognised the lack of a strong visitor focus within its museums, and the paucity of regular visitor research, NEMS has commissioned "New Tourism Markets for North East

Museums”: a research project, to “broaden the base of potential visitors to museums through the development of tourism markets outside the region.”³² A programme of training will be developed to empower staff to conduct and evaluate their own ongoing market research projects. Initial visitor research will be used to establish a benchmark profile, and models of best practice in terms of methodology. Targeted at small museums, an affordable DIY methodology will be designed for future research. These initiatives will contribute to a region-wide marketing strategy and action plan providing NEMS with recommendations for implementation and next steps.

5.1.3. Regional Tourist Boards

Beginning this year, all Regional Tourist Boards will offer a destination benchmarking service that will use a standard methodological approach to the collection of visitor information. The new English tourism body will be responsible for monitoring progress and promoting best practice³³. Regional and local tourism surveys can be used by museums to generate background information on visitors to a county or district, and will often survey visitor attractions.

5.2. Sector-Wide

5.2.1. Association of Independent Museums, Comparative Trading Survey

The Comparative Trading Survey was launched in 1995 to generate and analyse up-to-date market data for independent museums receiving 50,000 – 400,000 annual visits. Coordinated and aggregated by staff at the London Transport Museum, four-weekly figures are submitted on attendance numbers, admissions take and retail take from twenty-two museums. Figures are compared and swiftly returned to participating museums to answer the question, “Is it us, or is it the market?” Originally, only those coordinating the results saw how the whole group performed individually, with the figures acting as a monthly benchmarking study. However, as trust has developed, museums now know how each other is performing.

Receiving comparable data has been a big issue, as has the need to keep the survey simple. For example, some museums would submit four-weekly figures, others for a calendar month and which required statistical expertise to assimilate. The Survey provides information that managers need to know when making decisions, and is now beginning to generate trend data. Results are published in the *AIM Newsletter*. Hampshire County Museum Service has answered the call of the Trading Survey participants to develop a mini trading survey for museums receiving 10,000 – 50,000 annual visits. A pilot study of ten museums started this year.

5.2.2. The Lila Wallace Readers Digest Fund

The mission of the Lila Wallace Reader’s Digest fund is to “invest in programs that enhance the cultural life of communities and encourage people to make the arts and culture an active part of their everyday lives.”³⁴ Museums aiming to build their audiences can apply to the program for funding in support of research and programmatic activities. In 1997, the Lila Wallace Fund paid out a total of \$27,208,364 in grant money. This included \$2.3 million allocated to community arts centres to enhance programming and sustain audience development.

Currently, the Lila Wallace Fund's *Museum Collection Accessibility Initiative* is undergoing an evaluation process. This initiative has the specific goal of assisting fine art museums engage larger and more diverse audiences through culturally meaningful presentation of permanent collections. Through an independent consulting company, the 29 actively participating museums are being evaluated in terms of increased annual attendance, increased diversification of visitor base and increased accessibility of collections. The evaluation will be completed in 2003.

Between 1992 and 1997, this American Foundation funded a major initiative to assist art museums to expand and diversify their audiences. All museums participating in the programme were required to administer a regular survey of visitors to establish the baseline of information on who their visitors were at the beginning of the project and then to measure on a regular basis any changes in visitor demographics as a result of the initiatives undertaken by the museum to attract the audience. The Foundation retained consultants to design the questionnaires, pilot them, distribute them to participating museums, and analyse the results.

This project is relevant to our study for two main reasons:

- it encompassed an effort to collect visitor data amongst a large number of institutions utilising a common survey tool and a central system for data collection and analysis; and
- it was a multi-year project that endeavoured to assist art museums to diversify their audiences and create an expanded visitor base in their communities.

The project was conceived as a follow-up to the initiative of the American Museum Association best known by its publication "Excellence and Equity." In brief this publication charts the course for the strategic direction of American museums to put equal emphasis on reaching all members of the public (equity) and on excellence. In addition this initiative challenges museums to position themselves as significant educational resources in the community – thus focusing on museum education departments which historically had taken a back seat relative to other museum departments.

The Foundation will be publishing the results of this study. In our interview, LORD Cultural Resources focused on the usefulness of the visitor research component. The following findings are most relevant to this study:

- visitor research is critical because without good numbers, you cannot engage the issue of cultural participation in the arts;
- standardising surveys and data analysis across institution is very difficult; and
- variations in the demographic composition of the audience were attributable to many factors and were not necessarily a measure of the success or failure of the special activities and exhibitions targeted at the expanded audiences

The experience of the Lila Wallace Fund demonstrates that it is very challenging to design visitor research for a large number of museums – even when they are all art museums. The collection and comparison of basic visitor numbers (outputs) can be accomplished. However, it is very difficult to design a survey that will measure outcomes such as the impact of special exhibitions on particular audiences.

5.3. National

5.3.1. UK Museums

Museums in the UK do not have a national research strategy for generating and disseminating visitor information. DOMUS, administered by the MGC, is the museum sector's greatest single effort to produce reliable and comparable data, but collects museum-related statistics rather than externally focused material on the visitor. The MGC have contributed a series of ten questions to the latest Omnibus Survey (1998), with motivations, attitudes and perceptions of museums surveyed. The survey aims to position museum visitation into a broader lifestyle context. Further broad-based research is planned.

A revised *Visitor Attractions Monitor* for 1998 will soon be published in Scotland. Research has been taken over by the Moffat Centre for Travel and Tourism at Glasgow Caledonian University. Having received a 76% response rate to a more detailed survey, the report is felt to be the most comprehensive survey of its kind conducted in Scotland. The methodology allows museums to be analysed as a separate category from other visitor attractions. Data are also presented by area tourist board.

5.3.2. UK Libraries

A detailed national research strategy has been developed by the Libraries and Information Commission, and LISU provides nationally coordinated library statistics each year (see above).

5.3.3. Tourism in the UK

A lack of market information, or the ability to interpret and respond to it, has been identified as an area of major weakness in the tourism industry³⁵. Significantly, two of the key areas that the restructured strategic body for tourism in England will cover represent coordinated approaches to the collection and dissemination of research and visitor information.

Research – businesses need accurate and relevant information to enable them to plan ahead. Although some nationally commissioned research is widely available, many businesses, particularly the smaller ones, need assistance in using research to best advantage.

Overseeing systems for data collection and analysis – valuable data is collected at local and regional level but often lacks effective national coordination. The new body will ensure that a consistent format of information is used, that is accessible to all, that inter-regional comparisons are made and that a national overview is maintained.

DCMS Tourism Division (1999) Tomorrow's Tourism, p16

The British Tourist Authority shares market intelligence through several channels in addition to published sources such as *Visits to Tourist Attractions*, *Sightseeing in the UK* and other major surveys such as the *UK Tourism Survey*. The Research Liaison Group is chaired by the Head of Research at the BTA, and includes representatives of DCMS and all the national tourist boards. Meeting quarterly, its main function is the management of the *UK Tourism Survey*. It is also working on projects to develop a combined web-site for tourism statistics (forthcoming May 1999). Supported by DCMS, the Tourism and Leisure Research Network (TOLERN) is more of an academic body for the exchange of papers.

The Scottish Tourist Board has developed a Cultural Tourism Strategy and Action Plan (1998-2001). The Cultural Tourism Executive Committee includes the Scottish Museums and Arts Councils, Scottish Enterprise, and Highlands and Islands Enterprise. The Strategy intends to encourage the improvement of market research in the cultural sector as it relates to tourism. Over the lifetime of the Action Plan, one of the objectives of the Steering Group is to, "encourage the improvement of market research, marketing and management of arts and cultural organisations as they relate to tourism."³⁶

5.4. European

We cannot do very much about developing a cultural policy unless we have statistics to inform it. But if we are to have better statistics, we need to invest more resources in their collection and interpretation.

Mark Fisher, Minister for the Arts, June 1998.

5.4.1. Cultural Statistics

Culture became an area of key policy concern of the European community only recently. Consequently, the gathering of cultural statistics, and issues of comparability throughout different sectors and different member-states, are only now being addressed. It is interesting to observe that even before UK museums have developed a national research strategy, European information initiatives are already being discussed, albeit at a theoretical level. Comparability has been recognised as the major obstacle to the collection of meaningful pan-European cultural statistics.

If European museums are to serve the audiences of today and meet the demands of those of tomorrow, in an age of rapid social and political change, they must know more about their visitors and what they think. This can only be done through regular market research into the profile and needs of museums' audiences.

European museums should be encouraged to undertake more market research and to share and compare the results of this work and other related statistics.

Museums & Galleries Commission (1998) European Museums Beyond the Millennium, Museums & Galleries Commission. Proceedings from the European Forum, National Museums & Galleries on Merseyside, March 1998.

A Europe-wide time-use survey is currently being planned by the Office for National Statistics (ONS), the aim of which is to develop a comprehensive understanding of lifestyle. Intended to run for approximately five years, it is hoped that the keeping of diaries will produce a detailed picture of individual market profiles and participation and non-participation rates amongst different market segments. The ONS is heading a consortium to raise funding for the study.

5.4.2. LIBECON 2000

In an attempt to measure the economic impact of libraries throughout the member-states of the European Union, LIBECON 2000 aims to provide appropriate statistical evidence to inform investment and policy. A statistical database will generate reliable financial indicators for a full range of stakeholders. The database will be accessed from the LIBECON 2000

website. Ensuring consistent definitions is again a key issue, and the international standard for Library Statistics (IS 2789) is currently under review.

5.4.3. The EU Tourism Statistics Directive

This Directive was adopted in November 1995. The Directive requires the national governments of the European Union to provide regular sets of tourism statistics. Maintained by Eurostat (the Statistical Office of the European Union), the statistics are harmonised across the participating nations. Each nation is responsible for collecting the data and sending it to Eurostat that collates and disseminates the statistics each year. Accommodation capacity, guest flows and tourism demand are covered by the Directive.

5.5. Creating Methodological Frameworks

The purpose of a methodological framework or toolbox is to provide the techniques needed to produce comparable information. Examples of such frameworks have already been developed.

5.5.1. Prove It! A Market Research Resource Manual

“Prove it!”, a do-it-yourself market research pack, has been developed by a Steering Group of members from the South East Museums Service (East and West divisions, Bedfordshire and Hertfordshire), and with the backing of the MGC. The pack will be distributed to all Area Museum Councils. The pack will not only explain the relevance of market research, but will provide a methodological framework for generating comparable market data, taking into consideration all types of collection methods and potential uses of information. Twenty museums have been used as a pilot for different market research methodologies.

5.5.2. Measuring the Local Impact of Tourism

Produced in association with the National Tourist Boards, DCMS has put together a guidance pack that introduces users of local area tourism statistics to the importance of measuring the impact of tourism³⁷. A key point is that national tourism surveys are not designed to produce much local data, and that more work needs to be done at a local level. The advice pack encourages the collection of comparable and reliable data that is then turned into credible information. The report recommends the adoption of models to fill the current local information gap. To facilitate the comparability of data generated, the report sets out several standard terms and definitions. These are taken either from the European Union Directive on Tourism Statistics, or the annual UK Tourism Survey. Museums and galleries are categorised together in the categories for visitor attractions.

5.6. Professionalism and the Dissemination of Good Practice

The Visitor Studies Group, the first of its kind in the UK, has its inaugural meeting in November 1998 at the Birmingham Museum & Art Gallery. Chaired by Anne Pennington, Research Officer at NMGM, this group represents an important first step in the development and dissemination of professional standards and research projects within the UK. At present, visitor research programmes have limited exposure in the UK, in occasional *Museums Journal* and *Museum Practice* features.

Based in the United States, the Visitor Studies Association is an international organisation, and publishes a quarterly journal, *Visitor Studies Today*. The annual conference produces a

publication of papers delivered. The Committee on Audience Research and Evaluation is part of the American Association of Museums, and also holds an annual conference and publishes papers. In 1991 CARE produced *Professional standards for the practice of visitor research and evaluation in museums*.³⁸ Australia's Evaluation and Visitor Research Group again holds an annual conference. Each of the three organisations have web-sites and publish papers on-line.

Revealingly, for all the research carried out by the libraries sector, the lack of an annual publication bringing together best practice has been identified as a real obstacle to getting research understood and followed up³⁹. To be of real use, research needs to be replicable at other institutions. Courses in research methodology are planned under the auspices of the Library and Information Research Group, specifically aimed at linking research and good practice.

Section 6: Partnership Opportunities

It is important to recognise that there are many national, regional and local initiatives currently forging partnerships between different museums and between museums and other related organisations, and generating a great deal of useful visitor information. Several of the projects highlighted in this report have been completed, either in collaboration with or exclusively by, university departments and further education colleges. Many more heavily involve the broader visitor attraction and tourism sector. Next year, the MGC and the LIC will merge to form the Museums, Libraries and Archives Commission. Although many areas of service provision are not comparable, the focus on specific areas such as social exclusion, access and social auditing represent key areas of common concern.

A market research pack would be welcome, creating a toolbox of methodologies for use throughout the nationally-funded museums. The development of more local benchmarking and research studies may prove useful for the smaller museums funded by DCMS, such as those involving the Royal Navy Submarine Museum and Fort Nelson in Hampshire. Regional initiatives continue to demonstrate the advantages of collaboration between museums in the collection of visitor research.

6.1. Public/Private Partnerships

Few examples of public/private partnerships in the generation and dissemination of visitor information have been identified by this report. However, the most notable examples are the annual Benchmarking Study run by ALVA, the Association of Leading Visitor Attractions, and South Warwickshire Tourism.

6.1.1. ALVA Benchmarking Study

The ALVA Benchmarking Study surveys 25 tourist attractions throughout the country, of which seven are national museums. Two surveys – financial and quality of service – are offered to participants. Performance of individual participants can be benchmarked to industry norms (the mean score of all participants), mean scores of a particular sector, e.g. the seven national museums, or industry maxima and minima. The quality of service survey covers the following information of visitors: characteristics such as age, gender, party group, place of residence; visitor behaviour such as transport used and length of stay; expectations as compared to experience and visit quality as measured by satisfaction ratings.

6.1.2. South Warwickshire Tourism

South Warwickshire Tourism Ltd provides an example of a regional public/private partnership using a destination management system. It was established in 1997 by Warwick Castle, the Shakespeare Birthplace Trust, the Royal Shakespeare Company and Stratford-upon-Avon and Warwick District Councils.

A single database drives the web-site, *Shakespeare Country*, the Tourist Information Centres at Stratford and Leamington-Spa (soon to be joined by the TIC at Warwick), and a series of street-level self-service kiosks. The system holds the details of over four hundred member

organisations each paying a fee to appear on the web-site, and other promotional materials. Accommodation can be booked through the kiosks, and is planned to go on-line in the near future. The data-base has the potential to generate reports on whatever subjects South Warwickshire Tourism chooses. Names and addresses can be logged for marketing initiatives. It could easily be further adapted to get information on visitors. Specifically, the tracking of visitors to the website, to discover where virtual visitors have come from and what types of information they access whilst on-line. Ticketing for events and attractions will soon be added to the touchscreen kiosks and the web-site.

Section 7: Next Steps Advice

Given the current Government's emphasis on access, audience development and social exclusion, and developments such as Best Value, Local Authority Cultural Strategies and Regional Cultural Consortia – all of which will increasingly affect the monitoring of museum service provision – visitor research has never been more important.

The following next steps are recommended as sector-wide developments, but can be adapted to a state-sponsored museum sector approach.

- Develop standard fields of data defined and collated in such a way that the information can be effectively compared.
- Reassessment of the collection and use of visitor information throughout the museum community by the newly-created Museums Libraries and Archives Commission.
- Develop wider partnerships, particularly through the restructuring of the strategic body for tourism in England.
- Generally, partnerships with the tourism sector need to be fully explored, creating a 'joined-up' approach to the collection of visitor information.
- To be most effective, visitor research in the UK needs a dedicated publication that is distributed throughout the sector, either conventionally or on-line.
- Develop a UK Museums Market Research and Information Strategy with the full consultation of the museums sector, tourism organisations, and other related sectors.
- To ensure the reliability and comparability of information, a UK Museums Market Research and Information Strategy will need co-ordination.
- Any co-ordinated approaches to research will need to be centrally-funded by DCMS:
 - to ensure a commitment to visitor research as an invaluable contributor to the long-term sustainability of the museum sector;
 - to ensure the quality of the research and standards;
 - to support local, regional and national projects within a coherent methodological framework; and
 - to ensure effective dissemination of findings.
- A Steering Group should be set up to construct a common programme of research.
- Any market research initiative should be led either by the forthcoming body responsible for museums, libraries and archives, the DCMS, or the National Museum Directors' Conference.

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