

# Best Practices in Audience Research and Evaluation

## Case Studies of Australian and New Zealand Museums

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### INTRODUCTION

Today, audience research can be considered a widely used and accepted museum activity with established research approaches in diverse areas of application—from visitor and market research to the evaluation of exhibitions, programs and other organizational activities. While audience research is used as an instrument for determining the effectiveness of exhibitions and programs, for performance measurement and management (Hausmann, 2001; Reussner, 2003b) as well as organizational learning (Kelly & Sullivan, 1999), its own practice has rarely been examined in terms of effectiveness and learning outcomes.

Since the late 1980s, we have found perpetual criticism concerning the lack of effectiveness of audience research for museums, mainly the lack of use of audience research results (Gammon & Graham, 1997; Graf, 1997; Hood, 1992; Fisher, 2002; Loomis, 1987, 1993; Rubenstein, 1989). This leads to the question of how institutions can make the best possible use of audience research and the information it provides, and what needs to be in place for audience research to be effective.

While there is an awareness of the issue, its analysis has been based mainly on plausibility and personal experience. With the exception of the study by DiMaggio et al. (1978) into the quality and impact of arts audience studies as well as factors affecting research utility, there has been little

systematic study of the subject of audience research effectiveness. To reduce this gap, I'm presenting my study, which is explorative in nature.

This article reports findings from a study of some of the museums most active in audience research to identify success factors crucial to effective audience research. Two questions were central to my study: What makes audience research effective? and When can audience research be considered effective?

While the overall study has an international perspective, this article reports findings from eight case studies undertaken in Australia and New Zealand. (Studies of museums in Europe, the U.S. and Canada are in progress.) Following an explanation of the research approach taken, this article outlines the principal criteria for audience research effectiveness found in the institutions studied and highlights the main success factors underlying their achievements.

### RESEARCH STRATEGY AND METHODS

The central interest of my study was the examination of best practices in audience research. While the term best practice is used abundantly in publications, a concise definition is hard to find. For this study I defined the term "best practice" as a technique or method that, through experience and/or research, has proven to lead reliably to a desired result. My study sought to identify best-practice factors

that are relevant across diverse institutions and need to be in place for audience research to yield the desired institutional outcomes.

To determine best-practice factors, my research focused first on criteria for audience research effectiveness. I encountered a challenge defining the central concept of effectiveness and finding operational indicators to measure the effectiveness of audience studies. After consulting the literature on organizational effectiveness and effective museum management, I decided to follow a definition used by Griffin & Abraham (2000: 335), describing effectiveness as "meeting or exceeding the goals specified by the dominant coalition [of constituencies]" under the constraints facing the institution.

Effectiveness is essentially related to goal attainment, and outcomes are most widely used as effectiveness criteria (Gilbert & Parhizgari, 2000; Griffin & Abraham, 2000; Herman & Renz, 1999; Redshaw, 2001). Some authors have suggested a comparative model: an assessment of outcomes and subsequent comparison with pre-specified organizational objectives (Herman & Renz, 1999); with norms and standard measures (Ames, 1990; Gilbert & Parhizgari, 2000); or with other organizations (Ames, 1990; Herman & Renz, 1999).

For the purpose of this study, I decided to use as criteria for effectiveness those

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outcomes that audience research is expected to yield. If I defined outcomes as relative to an individual institution's audience-research goals, comparability between institutions would be limited. Therefore, I needed to identify outcomes that are common to a range of institutions.

My research goals suggested a multiple case-study approach. I expected it to provide deeper insights into the organizational context in which audience research occurs and the conditions under which results are effectively used, while at the same time allowing me to consolidate conclusions beyond the frame of the individual institution (cf. Yin, 1994).

I chose a set of cases by interviewing independent experts and reviewing audience-research publications. I selected eight leading Australian and New Zealand museums, which are very active in audience research, according to a typology developed to ensure a balanced view across a wide range of institutions. My objective was to cover museums with different collection and presentation focuses, as well as different levels of responsibility for audience research within the organizational structure.

The eight cases comprised a history museum, a natural science museum, a science center, a military museum and memorial, a maritime museum, and three multidisciplinary institutions. Unfortunately, I could not identify a purely art museum that was active in audience research on a level comparable to the other institutions selected. In terms of internal responsibility for audience research, six institutions had at least one dedicated position for audience research, one of which was appointed only recently. For contrast, one institution had a partial position for audience research, and one had no

internal staff responsible for audience research.

Each case study comprised interviews with four to five museum staff working in different areas, the collection of organizational documents, and an Internet-based survey of museum staff. The approach I employed in this study was based on the assumption that museum staff has invaluable insights and experiences and can help identify measures of audience research effectiveness and success factors.

Interviews were conducted with persons representing senior management, audience research, marketing and public relations, education and exhibition development. I used an interview guide focusing on the operation of audience research within the institutions, on context conditions, impacts and benefits, as well as perceptions of audience research.

I conducted a total of 28 interviews, both face-to-face and by telephone. Organizational documents such as annual reports, strategic plans, job descriptions of audience-research staff and organizational charts complemented the interview data. By way of qualitative content analysis, criteria for audience research effectiveness and best-practice factors were extracted from the interviews and, categories developed from the material (cf. Schmidt, 1997).

Effectiveness criteria and success factors were then used to develop a questionnaire designed to determine the relative importance of each best-practice factor. A contact person within each case-study institution was asked to distribute a request for survey participation among museum staff, again in different areas of work. The questionnaire was administered via the Internet (<http://www.eva.>

[reussner.net/questionnaire\\_engl.htm](http://reussner.net/questionnaire_engl.htm)), the address disclosed only to those invited to participate.

In total, 80 questionnaires were analyzed. According to the multiple case-study methodology, the data were analyzed first for each individual institution and then results were compared. This article draws mainly from cross-case comparison of questionnaire data. To complement the internal institutional views, I sought additional insights via six interviews with independent experts in both the audience-research and museum fields.

### LIMITATIONS

The information on which this article is based comes almost exclusively from museum staff. Although participants were asked to consider outcomes for all important stakeholders, the data may not capture the perspectives of museum visitors and other stakeholders. While at first it seemed helpful to assess effectiveness by including visitors' perceptions of the museums' quality, I rejected the idea as it would have been very difficult to determine the degree to which the quality of the visitor experience is due to audience research since other factors play a role as well. Additionally, the decision to conduct visitor surveys would have limited extremely the number of feasible case studies.

Therefore, I decided to conduct more case studies to be able to draw conclusions from comparisons. As it was clear that only a limited number of questionnaires would be received per institution, I sought to ensure that different areas of work were represented in the survey to provide a wide range of perspectives. Unfortunately this article's limited space does not allow discussing in

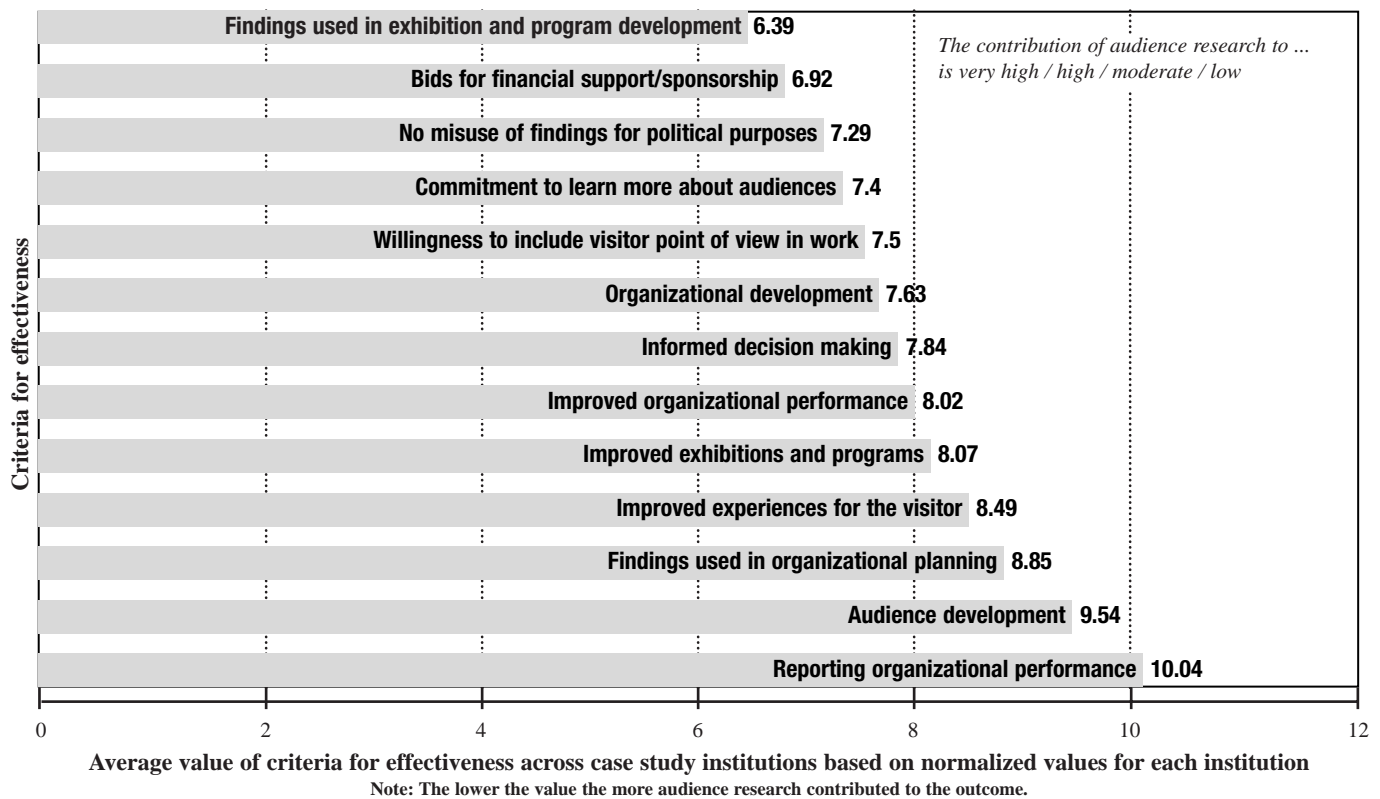


Figure 1. Criteria for effectiveness

detail how expert views differ from staff views.

## CRITERIA FOR EFFECTIVENESS

When can audience research be considered effective? From the data it became apparent that the impact of audience research went beyond the individual project for which it was conducted. Audience research affects the entire organization in many ways, including the organizational culture. By conducting qualitative content analysis of interview transcripts and organizational documents, I identified a wide spectrum of desired outcomes of audience research across institutions.

The most dominant effectiveness criteria were: the application of results to exhibition and program development and to organizational planning; the contribution of audience research to

informed decision making, to audience development, to measuring and reporting organizational performance, to bids for financial support by funding agencies and/or sponsors and to sustained organization development; improvements to the overall organizational performance, to exhibitions and programs and to the visiting experience; a commitment among museum staff to learn more about audiences and a readiness to include the audience perspective in museum work; and finally, not misusing study findings for political agendas.

I used these criteria for effectiveness to develop a questionnaire that asked museum staff from different work areas to assess to what degree audience research had contributed to the respective outcomes within their institutions. To ensure inter-organizational comparability, these ratings were

normalized for each institution before comparing them across the eight cases. *Figure 1* shows cross-institutional ranking of the criteria. The lower the value, the more audience research was said to contribute to the respective outcomes.

### Criteria for effectiveness results

These results indicated that audience-research findings were used primarily in exhibition and program development. That is, on an operational and project level rather than in long-term organizational development or planning (on a corporate level). However, respondents were not so sure whether the application of audience-research results actually contributed to *improved* exhibitions, programs and overall performance.

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I found it surprising that audience research results played an important role in bids for financial support or sponsorship. Apart from that, audience research appeared to be a driver for cultural change in that it is seen to increase visitor orientation [centeredness] within the institution. While audience research generally is assumed to contribute to increasing visitation and expanding audiences, it seems to do so less than one would expect, as the low rank of audience development here indicated.

### BEST-PRACTICES FACTORS

What makes audience research effective? My study data indicated that a combination of factors contributed to the effectiveness of the museums' audience-research activities. First, qualitative content analysis was applied to interviews and organizational documents to derive a repertory of best-practices factors identified as important for audience-research effectiveness.

This yielded 13 factors.

- *Research quality*: the level of scientific rigor and soundness of the study, the level of qualification and experience of the researcher
- *Acceptance and support* of audience research throughout the whole institution as a legitimate and valuable contribution to museum work
- *Resources* available for audience research in terms of money and staff (time)
- *Integration*: the degree to which audience research is integrated into processes such as exhibition development and other projects
- *Communication* and dissemination of audience-research findings

- *Responsibility*: the formal responsibility for audience research within the organization
- *Involvement* of staff during the development and conduct of audience studies
- *Visitor orientation* [centeredness] present throughout the institution
- *Research utility*: the degree to which the research is targeted and the findings are useful, actionable and readily available
- *Leadership of senior management*: the degree to which audience research is supported and driven by influential individuals in the institution
- *Understanding* of the role and methods of audience research among staff
- *Awareness* of audience research, in general, and the studies specifically conducted for the institution
- *Readiness to learn* from and apply audience research results.

### Best practices results

Does the literature support these findings? While DiMaggio et al. (1978) used different categories and distinguished between facilitating and inhibiting factors, there are some common factors, such as support of influential individuals (leadership of senior management), resources, hostility to public input (lack of visitor orientation), and a range of issues concerning communication and dissemination of study findings.

A review of more recent audience-research publications dealing with issues related to effectiveness showed full support of these best-practices factors. Authors who underline the importance of *research quality* are Brinkman (1996), DiMaggio et al. (1978), Klein (1991), Knott and

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Noble (1989), Prince (1992), Rubenstein (1989) and Shettel (1996). The importance of *research utility* appears in Hayward (1992) and Hood (1992). *Resources for audience research* is mentioned by Hood (1992) and Knott and Noble (1989), as is having an in-house person *responsible* for audience research by Wagner (1996). Ensuring the *integration of audience research* into processes and projects is in Graf (1997), Günter (1998) and Hayward (1992).

The broad *involvement* of internal stakeholders in audience research appears in Gammon and Graham (1997), Hayward (1992), Loomis (1987) and Shettel (1996). The issue of *communication* is found in Gammon and Graham (1997), Graf (1997), Günter (1998) and Hayward (1992); of *awareness and understanding of audience research* in Hilke (1993), Knott and Noble (1989) and Savage (1996), as well as acceptance and

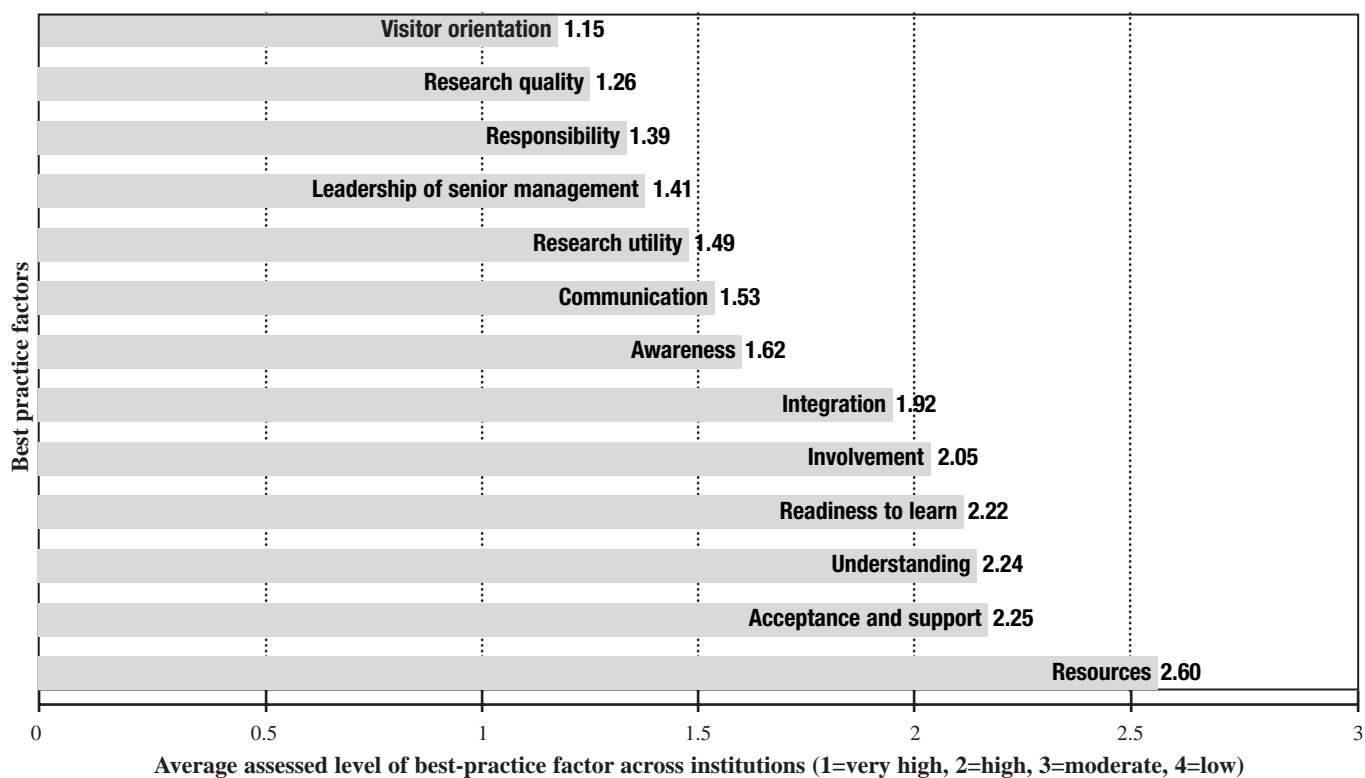


Figure 2. Average values of best practice factors

support of audience research, including *leadership of senior management* in Gammon and Graham (1997), Hjorth (1993), Kelly and Sullivan (1999), Spock (1996) and Wagner (1996).

*Visitor orientation* [centeredness] appears in the writings of Gammon and Graham (1997), Günter (1998), Hood (1992) and Shettel 1996, and a *readiness to learn* from audience research and implement results is also in Hood (1992).

This review of related literature supports the decision not to confine best practices to procedures in a narrow sense, e.g., research methods, but to consider also the institutional context, the organizational culture as well as management and communication issues as potential features affecting the effectiveness of audience research.

With the best-practice factors I developed a questionnaire, using multiple indicators to measure individual best-practice factors. I asked respondents to describe the operation, processes and perceptions of audience research and to assess to what degree the factors impacted the effectiveness of audience-research activities within their institutions. The analysis of the data aimed to assess the degree to which the factors were present within institutions and to examine the relation between best-practice factors and the outcomes derived from audience studies.

Figure 2 shows the average ratings for best-practice factors across the institutions. The lower the value, the stronger the best practice factor is, while higher values indicate areas of comparably lower performance.

Generally, the institutions I studied were assessed as highly *visitor oriented*, and their *research quality* was considered very high. By contrast, the low value of the item *resources* indicated that respondents perceive a lack of resources for audience research. Other items of relative weakness are the *involvement* of staff concerned in the development and execution of audience studies, the *readiness to learn* and apply results derived from audience studies, an *understanding* of the role and methods of audience research, and general *acceptance and support* of audience research throughout the institution.

While Figure 2 draws a picture of the status quo in terms of best-practice factors, further analysis aimed to derive a ranking of factors according to their relative importance. This allowed

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## Best Practices in Audience Research and Evaluation (continued from page 21)

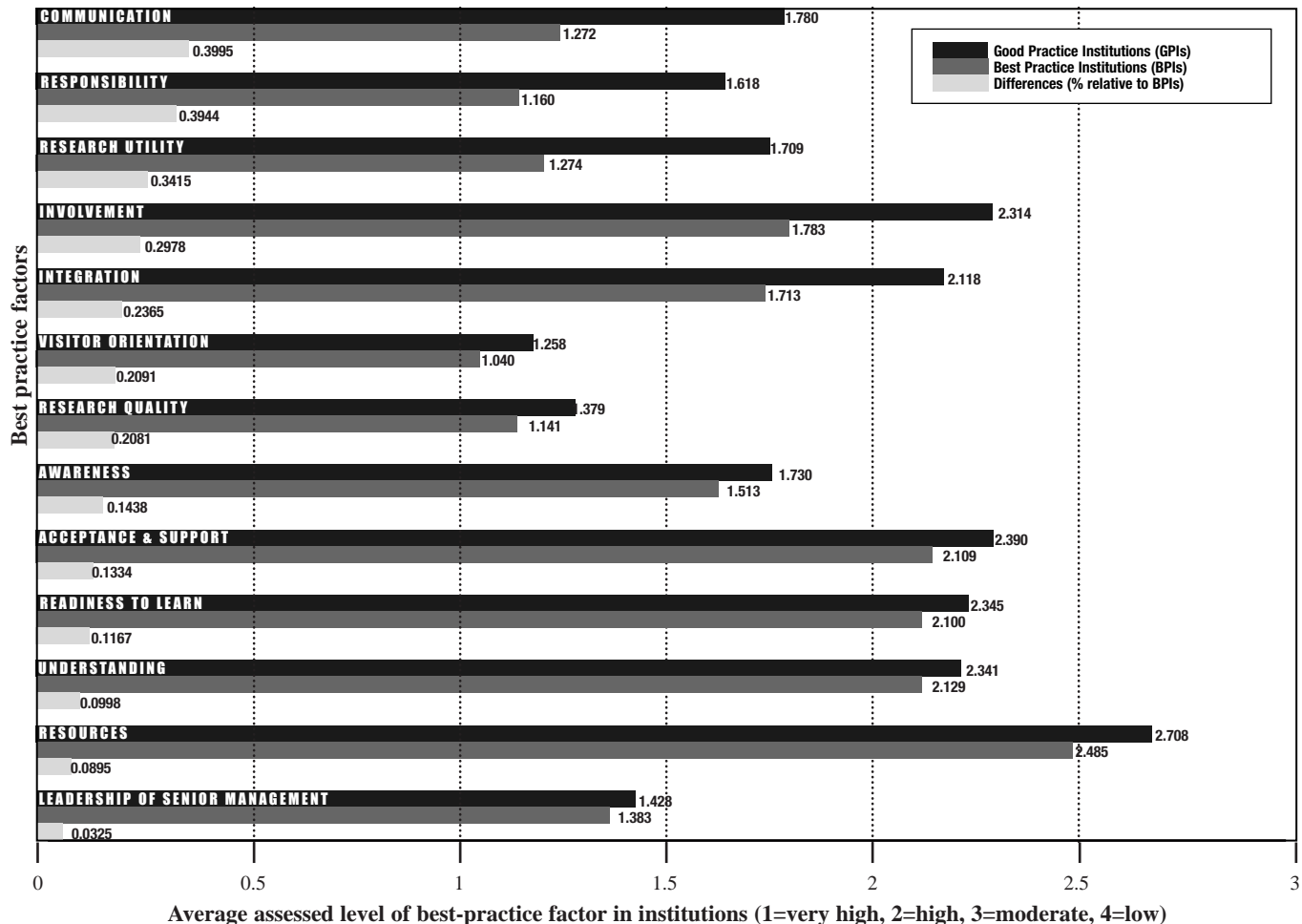


Figure 3. Differences in best practice factors between best and good practice institutions

identifying those factors that are most important *and* most deficient, in order to efficiently focus improvement efforts.

Further analysis of best-practice factors showed that institutions with higher effectiveness-criteria outcome scores also scored higher in best-practice factors, which indicated a positive relation between the presence of best-practice factors and the achievement of outcomes.

This result was used as a starting point for further analysis based on the comparison of the different case studies. The eight institutions studied

were divided into two groups according to the degree to which audience research is considered to contribute to outcomes. The four institutions in which the contribution of audience research to outcomes was assessed highest were taken as *best practice institutions*, while the rest were named *good practice institutions*. By comparing the average assessments of best-practice factors it was possible to identify those factors that most distinguish the best practice institutions from the good practice institutions.

This implies the assumption that the more a factor distinguishes the best institutions the more important it can

be considered for the effectiveness of audience research. Accordingly, a ranking of best-practice factors was derived from the degree to which the best-practice factors for audience research in the best institutions differ from those present in the other four institutions.

Figure 3 shows the average assessments of the best-practice factors for each group of institutions, plus the differences between the factor ratings of each group (in percentages). The bigger the difference between the average ratings, the more the respective factor

distinguishes the better institutions and the more important it can be considered for the effectiveness, of audience research.

Figure 3 shows that, in the ranking of best-practice factors, four items most clearly distinguish the best practice institutions, which scored about 30 to 40 percent higher than the good practice institutions, and thus appear to make the biggest difference to the effectiveness of audience research:

- *Communication* (39.95%): ensuring that findings are widely and easily made available, that reports are provided in a format tailored to the needs of the end users of the information and that implications of the research are discussed with the end users.

- *Responsibility* (39.44%): ensuring that someone is responsible for audience research within the institution, even if it is only partial.
- *Research utility* (34.15%): the research is targeted and the findings are useful, actionable and readily available.
- *Involvement* (29.78%): project staff are involved in audience research activities in that they provide input into the questions and issues that are to be researched, assist in developing the research instruments, sometimes assist in the fieldwork, and also discuss audience research findings with the researcher.

Another three factors were more than 20 percent higher in the best institutions: *integration*, *visitor orientation* and *research quality*. Given the importance attributed to research quality in the interviews it seems at first surprising that the *quality* of audience studies appears to be less important than their *utility*, but as the *quality* is generally considered high (see Figure 2) institutions do not differ as much in that regard as they do concerning the utility of the research.

While *resources* and *leadership of senior management* were issues of major concern to interviewees, these items only reside at the end of the ranking of best-practice factors after quantitative analysis. A review of the qualitative data made it clear that senior management played an important role in introducing audience research to the institutions, and since the current level of leadership is considered quite high across the institutions studied, all have reached a high level of research activity.

Similarly, resources do not so much distinguish the best institutions as the resourcing levels are considered low

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in all institutions studied, and this is an area where audience research staff have limited influence. Nevertheless, the best institutions overcame the limitations of resource scarcity by achieving high scores in other best-practice factors.

## CONCLUSION

What can institutions learn from these findings? In order to optimize their use of audience research, museums need to focus their improvement efforts on those best-practice factors in which the current status quo is comparably deficient (Figure 2) and which most distinguish the best institutions (Figure 3). These two conditions hold true especially for *involvement* and *integration*.

While there are no simple rules for achieving best-practice audience research, this study has illustrated some important success factors for audience research effectiveness. Drawing on the insights and experiences of museum staff from different areas of work in eight institutions, this study provides a picture of the status

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With this study into the effectiveness of audience research, I hope to contribute to a systematic reflection and discussion about audience research best practices and the professional development of the field. On a practical level, the study findings offer distinct starting points for institutions wishing to optimize their use of audience research.

According to the findings of this study concerns about the effectiveness of audience research need to go beyond questions of research quality and resources. It is crucial to expand the perspective to include management and communication issues. These results indicate that effectiveness of audience research should not be the responsibility of the researchers alone but an issue that concerns the organization as a whole. It is important to make audience research an integral part of the organization's operations and culture.

Further case studies of museums and exhibiting institutions in Europe, the U.S. and Canada are expected to extend and consolidate the insights gained. The results also suggest the examination of best-practice factors for institutions with a level of audience research activity lower than the institutions studied here, promising insights into different stages of institutionalization of audience research.

#### **ACKNOWLEDGMENTS**

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