

# “We’re all working on the same puzzle.”

## Nine tips for integrating market research, evaluation and visitor studies in your museum

1. **Communicate across departments.** Hold frequent meetings between marketing and anyone involved in visitor studies. Not just when research results are presented, but a standing meeting to share notes, process, and updates. Think transparency, not turf.
2. **Share ownership of findings.** Clearly articulate roles in the research & evaluation *process* (marketing does this and evaluation does that). But set *objectives* for all studies as a team, and make sure everyone takes ownership of all *findings*, no matter who did the study. Present reports jointly to all departments and leadership.
3. **Improve efficiency.** Reduce redundancy of studies by planning together. Develop standardized questionnaire language for common items (e.g., demographics, engagement) so you can compare data across programs and over time. Establish a consistent “house approach.”
4. **Create a joint position.** Hire one research specialist (or department) to oversee all audience-related studies. Establish that person’s credibility and neutrality for all departments. Expect him/her to stay current in both evaluation and market research methods, trends, etc.
5. **Unify projects.** Defeat the dichotomy by using each research project as an opportunity to learn about both marketing outcomes (was it satisfying? will it drive attendance?) and exhibit/ program outcomes (did people understand the content? did they learn or change?). You’ll do more with fewer research dollars, while fostering collaboration.
6. **Build a knowledge environment.** Create a database or intranet site where the results of all studies are archived. Make sure staff and leadership can access the findings in a common-sense way. Produce meta-summaries that integrate knowledge from various studies into an overall, constantly evolving picture. *Know what you know.*
7. **Make research an institutional norm.** Incorporate audience/visitor research into museum-level thinking, not just department-level thinking. Leaders and trustees should see research & evaluation as a natural part of all planning processes—including master planning and strategic planning. Invite researchers to the table early (don’t wait for a summative study).
8. **Ensure independence.** Structure internal relationships so that the research specialist (or department) is independent from the staff and projects he or she evaluates. Balance collaboration with objectivity.
9. **Fight the stereotypes.** Correct misperceptions when you hear them. Defend both perspectives as valid—and an integrated view as best. And keep the conversation going. It’s up to us.

Good

Better

Best

Where do  
you sit?

It depends on

where you  
stand.

*Evaluation  
perspective*

Seating this side

*Marketing  
perspective*

Seating this side

Pick a side.

Any side.

The Great Debate About Understanding Audiences

# *Evaluation*

1. Marketing is a numbers game); evaluators care about exhibit experiences (heart of museum)
2. Market research asks what would entice visitors – pulls museum away from mission (pandering)

# *Marketing*

1. Evaluators look only at learning; marketing looks at motivation & benefits in order to grow audience
2. Evaluators focus on museum's goals; market researchers look at visitor's own goals (outward view)

# *Evaluation*

3. Evaluators work with core museum depts.; marketing works on the fringes (support function)
4. Market research finds more of the same visitors; evaluation connects to underserved communities

# *Marketing*

3. Evaluators come in at end and give a grade; marketing brings audience voice to whole planning process
4. Evaluators study existing visitors (preaching to choir); marketing studies potential visitors to diversify/grow

# *Evaluation*

5. Market research too narrow and specific; only trained evaluators can study the museum experience
6. Marketing only interested in positive findings; evaluation provides much-needed criticism

# *Marketing*

5. Evaluation too narrow and specific; market research studies how people relate to museum as a whole
6. Evaluations always report success: consultants must please, and in-house evaluators are too embedded

# *Evaluation*

7. Evaluations are useful, immediate impact; market research tells what we already know, can't be acted on
8. Evaluation questions tie to museum's goals; market researchers make up their own (business) questions

# *Marketing*

7. Evaluations study isolated projects, findings aren't transferable; market research leads to museum-wide action
8. You don't need evaluation to show what's working, it's obvious to staff; evaluation is really done to please funders

# *Evaluation*

9. Market research uses fuzzy methods (focus groups); evaluation gets hard survey data, provides accurate picture

# *Marketing*

9. Evaluators use narrow questionnaires so results are predictable; our qualitative methods yield fresh insights that inspire real change

# Nine tips for integrating research & evaluation

## Good

### **1. Communicate across departments**

- regular meetings
- transparency, not turf
- communication → collaboration

### **2. Share ownership of findings**

- clarify who does what research
- set objectives together
- everyone owns all findings
- present jointly to all departments and mgmt.

# Nine tips for integrating research & evaluation

## Good

### **3. Improve efficiency**

- avoid redundant studies by planning together
- develop standardized measures
- establish a “house approach”

# Nine tips for integrating research & evaluation

## Better

### **4. Create a joint position**

- hire one specialist/department to oversee all research & evaluation
- establish credibility and neutrality with other departments
- stay current in both domains

### **5. Unify projects**

- use each research step to study both marketing and evaluation outcomes

# Nine tips for integrating research & evaluation

## Better

### **6. Build a knowledge environment**

- archive for results of all studies
- easy, common-sense access for non-researchers
- meta-summaries to integrate disparate studies into a unified picture
- constantly evolving

# Nine tips for integrating research & evaluation

## Best

### 7. Make research an institutional norm

- incorporate at museum-level, not just department level
- incorporate in all planning processes
- requires leadership (and trustee) advocacy

### 8. Ensure independence

- make research person/department independent of staff and projects being studied
- balance collaboration with objectivity

# Nine tips for integrating research & evaluation

Best

## 9. **Fight the stereotypes**

- correct misperceptions
- defend both perspectives as valid
- encourage integrated thinking
- **keep the conversation going!**

Market researchers are all about getting people in the door...and the shop and the restaurant. It's a numbers game. We evaluators care about what happens once people get to the exhibits. That's the heart of the museum, where the important stuff happens.

Evaluators think everything's about learning—that's the lens they see through. We marketing people see the bigger picture. We study why people visit, what they hope to get out of it, and what keeps some of them away. Which is how you become more relevant to more people, and grow your audience.

Their question is always, what would entice people to visit? That kind of thinking pulls the museum away from its mission and makes it too commercial. They sometimes lose sight of the line between being responsive and pandering to the crowd.

Their big question is, did the exhibit or program achieve its goals? What about the visitor's goals? That's what we market researchers try to figure out. We look outward, not inward. Because only museums that meet people's needs are going to thrive.

We're closer to the mission, because we work with the exhibit developers, curators, and educators. They work at the fringes, helping with business issues. Isn't marketing really just a support function, anyway?

Evaluators come in at the end of a project and give a grade to something they don't know anything about. It's too little, too late. We're involved and contributing from the beginning, helping bring the audience's voice into the planning process.

Marketing researchers help find more people who are just like the ones who are already visiting. Because for them it's all about revenue. We help the museum get better at engaging underrepresented communities—the people who need museums most.

Evaluators only talk to the people who are already visiting. So their work just makes the museum feel better about preaching to the choir. We look at the whole audience, including potential visitors, so the museum can expand and diversify into new segments.

Market researchers are fine if you're trying to figure out whether the logo should be green or blue, or gathering Zip-codes. But if you want to understand the real effectiveness of the museum experience, you need a trained evaluator.

Evaluators are great if you want to know whether the interactive handle should be green or blue. They're just not very...strategic. We get to the fundamentals: how people think (and feel) about the museum as a whole.

All the marketing department seems to care about are the positive visitor comments. They're only happy if the research report is good news. But museums need real criticism in order to improve. And that's where evaluators come in.

They always tell the client (and the funders) what they want to hear: that the exhibit or program was successful. The consultants have to, because otherwise they won't get hired the next time. And the in-house evaluators are so embedded these days that they've lost objectivity.

Our studies are useful. If we find a weak point in the exhibit, the team can fix it and make a real impact right away. With a market research report, all you learn is that visitors are pretty satisfied and pretty well-educated. How are you supposed to act on that?

They see only one exhibit or program at a time. Most of the time you can't apply what they learn to the rest of the museum, or even to your next exhibit. No wonder their reports go right onto the shelf. Our reports lead to action, for the whole museum.

Our research questions are tied to the museum's own goals. Once the developers, curators, or educators tell me what they're trying to achieve, I know exactly what to ask the visitors. Market researchers seem to make up their own questions, based on some business idea of what's important.

You don't need a high-priced evaluator to tell you what's working and what isn't. The floor staff can see that for themselves—they talk to visitors all the time. The evaluation is really just to please the funders.

I have to say, their methods are a little fuzzy. They love to use focus groups, where people will say anything to fit in or look sophisticated. We evaluators get hard data from surveys with museum visitors, face-to-face. So we can draw solid conclusions that tell it like it is.

They prefer surveys so they can control the responses. Their questionnaires are so narrow that the results are pretty much pre-ordained. We talk with people, so we're open to the kind of insights that could help you rethink the next exhibit or program in a whole new way.

I'm sure they mean well, but...

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