

# Chapter 1: The Countenance of Visitor Studies in the 1980's

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## Abstract

There is an evolving field of visitor research based both on evaluation and basic kinds of research studies. The occasion of a First Annual Conference in Visitor Studies along with a developing literature are two indicators of interest. Some specific approaches to studying how visitors use museums, parks, zoos and other visit settings can be identified. These approaches, while not yet reaching the status of formal theories, are yielding a continual output of investigations. The approaches include survey research, marketing analysis, visitor learning research and studies that emphasize applications of environmental psychology and sociology. Many studies entail a strong evaluation approach which emphasizes finding out how well exhibits and programs for visitors work. While these approaches can be identified in the countenance or appearance of visitor research, it is not yet clear what the dominant paradigm or approach to the field will be if indeed there is to be one dominant paradigm or approach. There are also some issues to be worked with in shaping the countenance of visitor research. These issues include defining the roles of different people working in the field, developing standards of methodology, and working directly with the problem of overcoming an applicability gap in getting the results of investigations into practices that benefit visitors.

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## Introduction

In his book, Creative Evaluation, Michael Quinn Patton gives us his first commandment of evaluation:

"Thou shalt have no other gods before evaluation – not planning, not policy analysis, not applied social science, certainly not basic research, or theory, or sociology, or psychology or any other ology or ism because the fields of research are confused

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enough already and if evaluators don't put evaluation first, then who will?" [Patton, 1987, p. 12].

By Patton's standard I'm afraid I have been living in sin, a condition some have suspected all along. When I do visitors' studies I often mix research and evaluation purposes. For example, we designed a visitor survey for the Denver Art Museum that included both evaluation and research objectives (see Loomis, Fusco, Edwards, & McDermott, Chapter 15). Even a more serious heresy, I fear, is my tendency to see evaluation as a specific form of research. I bring up this issue of distinguishing between evaluation and research to call attention to the evolving nature of the visitor studies field. For some, this distinction is very important, while others simply find it confusing. As a field of inquiry and application, visitor studies is coming of age and a number of questions and issues are appearing. This paper will look at some of those questions and issues from the author's perspective.

### **Are we yet a field of study?**

I cannot, on this the occasion of the first Annual Visitor Studies Conference, help but think of Edward R. Robinson, the psychologist who pioneered visitor research in the United States during the 1920's and 1930's. He envisioned a time when major museums would have staff members whose task would be to work with visitor-related problems such as the use of museum environments to produce informal learning (Robinson, 1933). Had his dream come true, we might see a much more firmly established field of visitor research today. Of course, something Robinson could not have foreseen would be the wide variety of disciplines and settings besides museums involved with visitor research and the growth of visitor education as a specialty field in its own right.

While interest in visitor studies is spread across a number of fields and organizations, I think that there are some positive indicators that a concentrated field of visitor studies is emerging:

1. Existence of a critical mass of workers. Dereck J. de Solla Price has suggested that it takes a hundred or so active workers to define a research area, and as workers increase beyond that number the field may divide into different emphases. I'm not sure just how many people are actively involved with visitor research, but attendance at this First Conference in Visitor Studies reveals a significant number of people working in visitor research/evaluation and also an increasing body of people involved with applying the findings of investigations. I am optimistic that there will

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be future visitor conferences and the groups of active producers of information and very important consumers of that information will continue to grow. Another suggestion of the extent of interest in visitor research is the very helpful 1987-88 Membership Directory put out by the International Laboratory for Visitor Studies as a membership benefit. The directory provides a list of consultants available as well as resource people at different kinds of museums.

2. Increased staff commitment. While over the years various people in visitor related institutions have advocated research on the visitor audience, one senses that there is a movement towards committing more staff resources to understanding the public that uses museums, parks, zoos, etc. This commitment may show up in the form of a marketing specialist or director of visitor services. For years, education departments have been sources of support for visitor research and often the location of specific visitor studies projects. Coinciding with the First Visitor Studies Conference meeting is the appearance of job descriptions emphasizing visitor research. Perhaps Robinson's dream may still become a reality.

3. Development of a literature. Historically, writings on visitor studies have appeared as technical papers and research reports, with a few journals such as Curator, Museum News, and Museum Studies Journal providing limited outlets for articles. Especially encouraging is the July issue of Environment and Behavior devoted to Zoological Parks. This issue demonstrates that other fields are beginning to recognize the importance of visitor behavior studies. Now there are indications that publications devoted exclusively to visitor research and evaluation are viable and growing in popularity. Visitor Behavior has combined a short article format with newsletter type information that has greatly helped to pull the field together. Bibliographies and a new journal from the International Laboratory for Visitor Studies add more information about visitor research and at least one book devoted exclusively to the topic has appeared (see Loomis, 1987).

One could point to other indicators such as increased program time at meetings of organizations like the American Association of Museums and the presence and activities of the Museum Evaluation and Research Committee of that same association.

## The countenance of visitor research

While the indicators cited above are encouraging, there are some major limitations to thinking that a field of visitor research exists. As

alluded to earlier, a variety of settings and subgroups are involved in visitor studies. Thus, there is the problem of parallel work evolving in zoos, parks, museums, etc. and the need to bring information being generated into one source or focus. Another problem is what kind of theory exists and how should visitor behavior theory evolve? Still another problem is reflected in the following question: Is there a methodology literature unique to visitor studies covering things like use of observation, formative evaluation, visitor surveys, and other topics?

To answer questions like those just posed we need the identifiable body of knowledge that is now emerging in visitor research. This emerging body of knowledge, however, is not very well organized. That is, we are not yet able to define the countenance or appearance of visitor studies as a unified field of investigation. We are in that cloudy stage of problem solving where our heads are filled with many ideas as well as sometimes disconnected thoughts and it seems impossible to derive a clear cut solution. A countenance of the field will emerge over time and serve to define what is encompassed in visitor research. That appearance will guide what is appropriate work, and identify key issues that will influence the appearance of the field. To be sure, no field of inquiry is apt to be static and unchanging and visitor research will always have some new happenings. What is accepted as part of the countenance will shape where the field goes and a number of years ago I raised the question of what constituted visitor research (Loomis, 1973). At the time I had a specific concern that the field not be too limited (e.g., visitor surveys, exhibit evaluation). The events of the years following made it clear that I did not have to worry ... visitor studies have taken a variety of approaches. The different approaches I identified then are still around and I have organized them into a series of questions about the content of the field. In addition, there are some issues beyond content that must be spoken to as part of shaping the countenance of visitor studies.

## Questions About the Content of Visitor Research

### Are we doing evaluation or research?

It is interesting to note that if one looks at the titles of some books on evaluation the word "research" is often included (see for example, Suchman, 1967; Weiss, 1972; and Rutman, 1977). I prefer to use the word evaluation as a modifier for research. Furthermore, in applied work such as visitor studies, evaluation projects may have to serve as the best

and often only source of information we have. I wonder if too much has not been made of the evaluation/research distinction? To be sure, it is important to clearly understand the limitations of a specific study undertaken and Weiss (1972) provides in her introduction one of the best discussions I have found outlining similarities and differences between evaluation and other forms of research.

### **Are we doing surveys?**

The answer to the above question is, of course, an emphatic yes! Surveys remain a very popular method for learning about visitors. The use of surveys has evolved from rather simplistic front door devices used to describe visitors to increasingly sophisticated efforts that draw more fully on the research potential of survey methodology. As I have pointed out elsewhere (Loomis, 1987), surveys are increasingly performed outside of the museum, zoo, park, etc. to include non-visiting respondents. Among the topics studied in these broader sample studies are reasons for not attending (see Klein, 1978; Hood, 1983). Surveys are also being used to probe at perceived benefits of attending and using visitor settings such as parks and museums (see for example, Klein, 1984; Draper, 1987). In her presentation to this conference, Hood (Chapter 9) has demonstrated the need to have repeated waves (samples drawn) across different seasons of the year to adequately understand how the audience changes across the year. Successive samples permit the detection of changes and thereby bring into play the full potential of survey research that is missing in one "shot" (sample) studies.

I find the above developments encouraging and they suggest that survey research will continue to be part of the countenance of visitor studies. There is a need however, to develop more complete theory to guide survey research and also to make clear the standards required for proper use of the survey (see, for example, Hood, 1986).

### **Are we doing market research?**

Again the answer to the question is yes and I am impressed at how the interest in marketing research has grown and in some cases been more effective at encouraging people to look at visitors than years of evaluation and research efforts. Changing economics in the support of nonprofit institutions have been a major driving force behind the acceptance and application of marketing research. There is a need to distinguish between marketing research as such, and the broader efforts of visitor evaluation and research. While marketing research involves some elements that overlap with the broader focus of visitor studies (e.g.,

measure audiences and define specific target groups, design and pre-test materials for those target groups, test to see that exhibits/programs work as planned), it is important to see where there are differences. For example, a focus group study designed to elicit ideas for new programs and/or exhibits is not the same thing as a community based survey done to measure public perceptions and interests in a zoo. Or, a consumer panel study to assess the acceptability of a new exhibit to a specific audience group is not the same thing as an educational evaluation of the learning potential of that exhibit.

Marketing will no doubt continue to show up in the agenda of visitor studies. Just how it will fit into the broader picture of things remains to be seen. DiMaggio (1985) demonstrates that theories about how to market cultural institutions can also reflect broader issues of how these institutions relate to their publics. For example, what he calls the Hypodermic Strategy of audience development consists of stimulating attendance by staging "blockbuster" exhibits that draw crowds on a short term basis. The "blockbuster" exhibit is a prime example of a public event that needs good evaluation research in order to understand both short and long term costs and benefits related to this kind of audience development strategy. Marketing research in this case can overlap with broader research goals of understanding some of the institutional characteristics of museums and other visitor based settings. DiMaggio describes other audience management strategies that could provide both research and theory development opportunities.

### **Are we doing learning research?**

I admit that this topic I find the most elusive of all the different ways of looking at visitor studies. There has been a lot of talk about visitor learning, but as far as I am concerned most of what has been done is to demonstrate under what conditions visitor learning may occur. I feel that we have not moved very far from Harris Shettel's model that distinguished between attention attraction, attention holding, and learning as a third factor (see Shettel, Butcher, Cotton, Northrip, & Slough, 1968). To be sure, it is important to know how to measure visitor learning and to develop a technical knowledge of ways exhibits can be enhanced to better facilitate learning (see Screven, 1986).

What I perceive as needed, and think we are starting to see coming into view in the countenance of visitor research, are ideas about how visitors learn. Two lines of work give me cause for optimism. First, there is a growing interest in what could be called experiential or nontraditional learning. To develop criteria for visitor learning we are

going to have to go beyond classroom and industrial learning criteria such as cognitive/information processing and skill acquisition. One interesting line of investigation is to look at the flow of experience as defined by Csikszentmihalyi (1975) and recently applied to the visitor experience of art. Staff at the Denver Art Museum have been exploring ways of defining the experiences of the art novice that not only involve learning information, but developing new responses and attitudes for dealing with art (McDermott, 1988). Included in this work is the assessment of peak experiences that make a visit to an art museum exciting and unique from other activities. In a related effort applied more to history museums, O'Connell (1987) calls for learning theory that takes into account stages in adult learning which include learning styles, personality characteristics and greater emphasis on emotional learning.

Second, I am impressed with Koran's work on systematizing visitor learning phenomena and developing a model for museum and zoo educational research such as he presented at this meeting (Koran, Koran, & Foster, Chapter 7). Included in this work is an emphasis on individual differences in visitor learning. There is a vast research literature on both learning theory and application and it is important to relate visitor learning research to that literature. At the same time, I think it is important for visitor learning theory to evolve from the "bottom up" rather than have too much emphasis made on trying to force visitor learning behavior into existing theoretical formulations. Real data should guide the conceptual development of how people learn in the unique settings provided to visitors.

### **Are we doing environmental research?**

Because visitor experiences usually occur in natural or architectural spaces it has been useful to relate methods and theory from environmental psychology and sociology to visitor studies. Two topics illustrate this tendency well. First, the early work of Robinson (1928) and Melton (1933) revealed that the study of how visitors behaved in different exhibit spaces and galleries was a combined design and behavior analysis problem. Evaluating visitor use of space and circulation patterns in galleries has evolved into a basic assessment task. One way of answering the question of how well a specific exhibit space works is to observe traffic flow patterns, as well as points of attraction and attention times to different objects or features of the exhibit. A second area of study that clearly reflects environmental concerns is visitor orientation as illustrated by Bitgood in his presentation to this Conference (Bitgood, Chapter 17). Evaluating and then planning for visitor comfort, wayfinding and conceptual understanding of the

environment are increasingly taken for granted as part of visitor services. As Bitgood notes, planning for visitor orientation needs should encompass the entire visit from pre-visit to leave-taking.

Perhaps one of the most important contributions from the environmental emphasis is the concept of Post-Occupancy Evaluation. This concept of evaluation research relates user behavior to design and planning criteria. If employed as part of the planning process and integrated into the design cycle (planning to fabrication to installation and operation), it is possible to use both formative and summative evaluation studies to improve the effectiveness of exhibits and programs. Lessons learned on one project can be passed on to the next one (see Zeisel, 1981).

How each of these five questions is answered, and answers to others that I have not thought of, will determine the countenance of visitor studies. I will be surprised if any one approach comes to dominate the field. I also suspect that we will continue to see a mixture of research and evaluation efforts.

## Some Issues to Resolve

The countenance of visitor studies also reflects a number of issues about the field. I want to address three of these issues.

### Who should do evaluation and research?

As a field of work develops, different actor roles are apt to emerge. This emergence of roles is especially true for a field as heavily invested in applications as is visitor research. Some of the roles I see include:

- The researcher interested in basic studies into leisure time behavior, visitor learning and similar topics. This individual would have strong method and theory knowledge and skills.
- The professional evaluator who can design and conduct evaluation studies to assess how well things work.
- The marketing researcher who knows how to define audience segments and test for effective products that reach targeted segments of the visiting audience or the public in general.
- The knowledge user who can get results of research and/or evaluation into the system and produce some changes.
- The visitor advocate who could be a researcher, but most often someone in the system such as an educator, director of visitor services or administrator.

Some of these roles could overlap in the same person, but there will need to be some clarification of standards. The Museum Evaluation and Research Committee of the American Association of Museums has already been a forum for discussing problems connected with who should do evaluation and research. This group or some other national body should be charged with preparing guidelines that could be disseminated through annual meetings and publications. If the field becomes large enough, it is possible that some certification process will emerge.

I must confess to being skeptical about regulating standards through certification procedures because of the costs and complications involved. Furthermore, the kinds of institutions involved with visitor research are so varied that I think it will be hard to define roles in too standardized a manner. I also wonder if the field will ever become large enough as to justify elaborate certification procedures. I suspect that some general guidelines, resumé inspection, and individual reputations as spread by word-of-mouth will remain the main means of insuring qualifications of people doing evaluation research.

For most situations, some form of collaboration between various staff members, a consultant and/or consulting research firm such as a marketing group, and a university person with access to computer resources will be the most common means of doing work. Some larger institutions may be able to supply the expertise with staff appointments. The growing sophistication of PC level computers will make it possible to have self-contained visitor studies programs.

### **How strong is visitor research methodology?**

One reason for being concerned about who does evaluation is the need for good methodology. One of the biggest obstacles to getting visitor information is a lack of appropriate skills and knowledge to design, instrument, collect and analyze projects. People spend years in graduate school acquiring these capabilities and it is naive to think anyone can do evaluation or research with a little coaching. Besides locating qualified people, as discussed above, I see two other needs related to methodology:

1. There is a need to generate workable method guidelines for specific visitor evaluation tasks. Let me illustrate with two examples. First, a focus group is not a visitor or community survey. Because focus groups have become a fad there is a temptation to use them in situations where a complete survey with a proper sample should be employed. There is a danger that managers and administrators will pick methods that appear

economical and quick when more stringent criteria should be considered in determining what methods to employ. Second, there seems to be some confusion about what constitutes adequate procedures for doing formative evaluation. Is it really strong method to use just a few visitors to get formative feedback or must one always draw a representative sample of reasonable size? The answer seems to be "yes" and "no." Anyone who has done any formative testing knows that often two or three visitors can spot a major problem that should be changed at once without further testing. Valid methodology, however, calls for a more adequate sample and use of some kind of formal design and procedure. Perhaps it is helpful to think of levels of formative evaluation:

- Preliminary shakedown. A small number of visitors are shown mock-ups or preliminary text and asked to comment. The idea is to get major mistakes or misunderstandings out of the way without wasting time. The underlying assumption is that no matter how carefully staff prepare materials there will be differences in perceptions when visitors are brought into the review process. Some of these differences are very basic and can be determined rather easily.
- Consumer panel. Ten to fourteen visitors can be recruited, usually paid, and asked to come in for an afternoon or evening and give their reactions to some preliminary materials such as exhibit mock-ups. My preference is to have the visitors look at the test materials, fill out questionnaires individually and then complete a group interview. A lot of data can be generated quickly from a small sample and the materials can even be modified during the group interview to get reactions to changes. The panel can be chosen to represent a cross section of the visiting audience or selected to represent a particular target group such as families.
- Mock-up studies. When work has progressed to the point where a final mock-up is available it can be useful to do a more complete small sample experiment and/or survey with pre-test and post-test groups to measure visitor learning of facts and other reactions such as comprehension of a story-line or conceptual based theme. Griggs (1981) provides some good working examples of small scale studies.

The point to the three examples shown above is that some agreed upon procedures need to emerge for doing formative evaluation and different levels of validity could occur with different choices. Practical experience suggests that low level methods can be very helpful in

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detecting major problems and more subtle problems can be teased out with stronger, but still economical, procedures.

2. While guidelines and good working examples are helpful, it is also necessary to distribute information about methods to people who can do some evaluation even though their personal backgrounds may be limited. I am continually aware of staff members undertaking evaluation studies because the need for visitor information is present and there is little time and/or resources to contract the work or even hire a consultant. This situation of staff doing evaluation research on their own presents a real problem for making sure the best methods are selected (and properly used). While not the ideal solution, workshops, books, exemplar studies written up in journals, and computer software packages can help bring about a standardized methodology for basic evaluation studies such as visitor surveys, formative evaluation and observation of visitor movement in galleries.

### **Does it make any difference?**

I am indebted to the late Robert Wolf for getting me thinking about the institutional problems of implementing the results of visitor studies into actions that make a difference. The zeitgeist or times seem to be right for bridging what can be called the applicability-gap or the failure to get into practice ideas that are generated from research and development. While there have been AAM meeting panels on this problem, much more needs to be said and worked on. Once again, the AAM Museum Evaluation and Research Committee is a possible task force for dealing with the applicability-gap issue. I have commented elsewhere (see Loomis, 1987, Chapter One) on thinking of evaluation as an aid to management and not just an enterprise in its own right. That is, evaluators/researchers must talk to people in visitor related fields and not just to themselves.

One major potential of having an annual visitor studies conference that includes both those involved in doing research/evaluation and participants concerned with application is constructive dialogue on how to bring about change and implementation.

Making a difference is also a reason for thinking of evaluation as part of the design and planning cycle mentioned earlier. A major advance in overcoming the applicability-gap will have been realized when the results of past research and any ongoing evaluation can be immediately incorporated into the development of a project as it proceeds.

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## Summary

There are some encouraging signs that visitor research is maturing into a distinct field of inquiry and application with a more clearly identifiable countenance. A growing literature, an annual meeting as well as representations at other meetings, and most of all, a growing body of workers all suggest a specialty in the making. While a coherent system of theory is lacking at the present, there is a developing body of both evaluation and basic research based on a variety of approaches or paradigms including survey methods, marketing analysis, applied learning, and environmental investigations. Some specific issues facing the field include clarification of roles for different workers, development of guidelines for specific methods related to visitor studies and increased dialogue over how to implement visitor research into effective change and application.

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