
DEFINITIONS

Museum ([International Council of Museums, 2007](#))

- A museum is a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment.

Visitor Studies ([Visitor Studies Association](#))

- The interdisciplinary study of human experiences within informal learning environments. The systematic collection and analysis of information or data to inform decisions about interpretive exhibits and programs.

Formative Evaluation ([Visitor Studies Association](#))

- Provides information about how a program or exhibit can be improved and occurs while a project is under development. It is a process of systematically checking assumptions and products in order to make changes that improve design or implementation.

Front-end Evaluation ([Visitor Studies Association](#))

- Provides background information for future project planning and development. It is typically designed to determine an audience's general knowledge, questions, expectations, experiences, learning styles, and concerns regarding a topic or theme.

Outcome-based Evaluation ([Visitor Studies Association](#))

- Evaluation that focuses on measurable visitor outcomes rather than outputs.

Remedial Evaluation ([Visitor Studies Association](#))

- The assessment of how all individual parts of an exhibition or interpretive project work together as a whole in order to improve the impact on visitors.

Summative Evaluation ([Visitor Studies Association](#))

- Conducted after an interpretative media, program, or exhibition is completed and provides information about the impact of that project. It can be as simple as a head count of program attendance or as complex as a study of what individuals learned; what is assessed should be tied to project goals and objectives.

Interpretive Planning ([Visitor Studies Association](#))

- The decision-making process that blends management needs and resource considerations with visitor desire and ability to pay to determine the most appropriate interpretive (educational) prescriptions for their site and situation. Interpretive Plans often include at minimum, sections that address, **(a)** the context and situation - history, background, rationale for the plan, **(b)** purpose for the plan, **(c)** inventory and analysis of facilities, resources, programs, issues, audiences, **(d)** media alternatives and decision criteria; media recommendations, and **(e)** actions needed – timeline, budget, resources.

EVALUATION

Recommended Literature: [Allen, 'Secrets of Circles: Summative Evaluation Report', Children's Discovery Museum of San Jose, 2007](#) / [Tzortzi, 'Movement in Museums: mediating between museum intent and visitor experience', 2014](#).

Definition (*US Government Accountability Office*): systematic study using research methods to collect and analyze data to assess how well a program is working and why.

Two Purposes of Evaluation: (1) proving or demonstrating if 'change' is taking place and (2) improving, seen as a constant reflection on further development

Stages of Evaluation:

- very early stages → front-end
- program is in development → formative
- troubleshooting for program has been already launched → remedial
- program has been completed and set in motion → summative

Methods of Evaluation:

- Front-end: focus groups, surveys and questionnaires, unstructured and semi-structured interviews, informal conversations and feedback, online surveys, and community/stakeholder workshops
- Formative: testing physical components [test, graphics, object placement, interactives] using mock-ups and repetitive methodologies w/ smaller samples in semi-structured interviews
- Summative: large scale visitor surveys, structured observations, tracking studies, formal testing [in-depth interviews, critical appraisal, media/critical reviews]
 - Paper and pencil timing and tracking: one of the most labor-intensive data gathering methods, obvious to visitors, difficult to accurately record times at each element
 - Accompanied visit ([Haywood 2018](#)): gaining insights into visitors' experiences during visits, through analysis of naturally occurring conversations
 - Self-report mapping ([Rainbolt et al. 2012](#)): compromise between money, researcher time, and sample size

Variables to Consider: situational: day of week, time of day, month/season, weather conditions, level of crowding, special programs/events, presence of staff

Variables to Record: stopping behaviors: total time in area, total and avg. number of stops, level of engagement for specific elements, time (min:sec) in total and specific elements, 'down time'/non-exhibit related (talking on cell phone) / other behaviors: visitor path (route taken in galleries), social interactions w/ others in group, other visitors, staff, using hands-on interactive elements, watching videos

Sweep Rate Index (SRI): SRI = square footage of exhibition [divided by] median visit time

- ex. 5000 square foot exhibition w/ a median visit time of 20 minutes would have an SRI of 167
 - The lower the SRI, the more time visitors are spending in the exhibition

Visitor Cueing: cued visitors spent more time in the exhibitions than uncued visitors - introduce cueing w/ 'spend as much or as little time as you wish'

- Best practice: gather conditions w/ visitors that are cued and uncued – if information is gathered under cued conditions, it should always be stated what assumptions are about cued data and whether that data can be generalized to uncued visitors

EXHIBITIONS

Recommended Literature: [Guler, 'An exhibition design checklist for visitor circulation', 2015.](#) / [Bennett, 'Object Label Quality and Label Readership in Small Museums', 2019.](#) / [Rappolt-Schlichtmann and Daley, 'Providing Access to Engagement in Learning: The Potential of Universal Design for Learning in Museum Design', 2013.](#) / Serrell, *Exhibit Labels: An Interpretive Approach* / Alan Leftridge, *Interpretive Writing* /

Types of Exhibition Designs: object-based [relics, artworks, etc.] and information-based [images or texts]

Criteria of an Exhibition (*Guler 2015*): target audience, exhibition space, circulation quality, circulation continuity, exhibit element interrelations, visitors' time limitations, backtracking and exiting behavior

Exhibit/object Labels: adequate lighting, typeface is reasonably long, sized, and legible, the use of active verbs, not using academic sounding language/jargon, not patronizing, does not interfere with the visitor's ability to process visual information in exhibition, some labels should give visitor something to do (as a result: agree/disagree, form a conclusion, look more closely at object or image), angle physical labels on display for easier viewing, avoid glossy surfaces/glare, place label as close as possible to object/best placement

- Types of labels: title, subtitle, introductory, group, caption, identifier
- Word count: 150 words MAX for introductory, 10-50 words for caption
- Fonts: Times New Roman, Palatino, Century Textbook, Garamond, Helvetica, Optima, Univers, Avant Garde
 - No more than two different types on a single label
- Black text on white background
- Possible evaluation tool: Object Label Quality Scale (OLQS) - (*Bennett 2019*)

Navigation/Wayfinding/Signage:

- 'Wayfinding is the act of self-guiding. Wayfinding is gaining an understanding of where you are relative to other things in your environment and then moving successfully and intentionally to another location [...] the strategically organized set of tools that facilitate successful wayfinding – signs, maps, icons, color systems and other elements.' (*Hunt Design 2010*)
- Tools: direction signs, you-are-here positioned on maps, museum guides, exhibition self-guides, physical visual access in gallery

Access: UDL (Universal Design for Learning) → multisensory presentation of information benefits many groups of visitors, not just specific groups that need that experience (ex. visually impaired → touch)

- HOWEVER, 'accessibility does not, on its own, allow for the engagement of people with disabilities in the museum experience per se [for example, engaging with and learning from audio or text labels]' (*Rappolt-Schlichtmann and Daley 2013*)

Authenticity: higher affinity for *constructivist perspective* with object authenticity – where authenticity is not considered to be inherent in the object, but instead comes to life through specific interactions between people and material things (*Hampp and Schwan 2014*)

- Objects on display in a museum context (staging, appearance) played a role in its classification

Visitor Circulation: patterns of visitor circulation are influenced by the general value principle (benefit/cost ratio predicts visitor choice of movement)

- Implications for exhibition designers: develop exhibitions w/ visitor circulation patterns in mind and design so that visitors do not have to take extra steps, minimize the number of steps by not requiring backtracking, don't design w/ multiple choice points where visitors have to make choices or where they will exit the exhibition w/o giving attention to all of the exhibit elements, and avoid designing two-sided exhibitions where exhibits on one side compete w/ those on the other (*Bitgood 2006*)

MARKETING/FRONT-END

Recommended Literature: Kotler, Kotler, Kotler, *Museum Marketing and Strategy: Designing Missions, Building Audiences, Generating Revenue and Resources*, 2008. / Wallace, *Consumer Research for Museum Marketers: Audience Insights Money Can't Buy*, 2010 /

Barriers to Visiting: lack of interest/time/understanding, cost, general perceptions that museums are places of education and learning → boring and dull

Types of Member Activity: high actives (contribute the most time, money, and energy), moderate actives (participate frequently but w/ less involvement), inactives (continue membership, but participate infrequently)

Four Categories of Communicative Functions of Museum Lobby Space ([Mortensen et al. 2014](#)):

- information- answers basic questions of what, where, how much, etc. - using physical interfaces with signs, posters, maps, brochures, social interfaces (staff)
- social- where physical interfaces interact with visitors - atmosphere
- commercial- primarily ticket sales – can be difficult to tell the gift shop and lobby apart because of a shared counter
- practical- preparatory, behavioral, and auxiliary to experiencing the exhibitions – toilets, wardrobe, lockers, etc.

VISITOR EXPERIENCE

Recommended Literature: [De Rojas and Camarero, 'Experience and Satisfaction of Visitors to Museums and Cultural Exhibitions', 2006.](#) / [Packer et al., 'Developing an Instrument to Capture Multifaceted Visitor Experiences: The DoVE Adjective Checklist, 2018.](#) / Hooper-Greenhill, *Museums and Their Visitors*, 1994 /

Visitor Experience Definition: 'an individual's immediate or ongoing, subjective and personal response to an activity, setting or event outside of their usual environment' (*Packer 2018*)

Contextual Model of Learning (*Falk*)

- Personal- experience w/ and knowledge of content and design of museum
- Physical- influences how visitors move through the museum, what they observe, and what they remember
- Socio-cultural- one's cultural background & experiences in the museum
- Time- prior experiences/expectations, motivations, knowledge, interests

Visitor Preference Styles

- Ideas: looking for info, interested in facts
- People: looking for photographs/video/audio, interested in demonstrations and performances
- Object: looking for artifacts, interested in aesthetics, origin & use
- Physical: interested in building, movement through space, sensation

Visitors can be Seeking (and/or expect):

- Confirmation of their identity, beliefs, and ways of seeing the world; To expand themselves through positive experiences in a safe and familiar space; Easiness and fun; Cultural environment; Personal identification; Historical reminiscence; Escapism

10 Facets → 15 Dimensions of the Visitor Experience (*Packer 2018*):

- Physical experiences → physical activity
- Hedonic "" → excitement
- Sensory "" → aesthetic appreciation
- Restorative "" → peacefulness
- Relational "" → togetherness
- Spiritual "" → spiritual engagement
- Cognitive "" → attention, fascination
- Emotional "" → privilege, compassion
- Introspective "" → reflective engagement, connection
- Transformative "" → autonomy, personal growth
- Negative "" → tension

Universal Design (also see under Exhibitions page)

- 'Focusing exclusively on physical access does not reflect the full spirit of a dynamic view of museum experiences' → 'when exhibits and programs provide for access and learning for individuals with disabilities, the benefits for all museum visitors are palpable' (*Rappolt-Schlichtmann and Daley 2013*)
- 'Disability is not situated within the person, but rather in the interaction between the person and the environment' (*Rappolt-Schlichtmann and Daley 2013*)

Visitor Experience Checklist (*Packer 2018*)

Web Design (see more under Website Design/Social Media page)

- Krug, *Don't Make Me Think, Revisited* book

Senses: going beyond using sight, but expanding into sound, smell, and maybe even taste

WEBSITE DESIGN/SOCIAL MEDIA

Recommended Literature: Krug, [*Don't Make Me Think, Revisited: A Common Sense Approach to Web and Mobile Usability*](#), 2014. / [Pallas and Economides, Museum's Sites Evaluative Framework \(2008\)](#) / [Lopatovska, 'Museum website features, aesthetics, and visitors' impressions: a case study of four museums'](#), 2015. / [Valenti, 'Usability testing for a community college library website'](#), 2019. /

'building well-designed websites is another pathway to museum experiences beyond museum walls'

Three Dimensions of Artifacts ([Hartono & Holsapple 2019](#)): aesthetics, functionality, symbolism

Four Dimensions of Experience ([Pallud & Straub 2014](#)): entertainment, education, escapism, esthetics

Five Categories of Design Features ([Lopatovska 2015](#)): search/browse features, image manipulation features, interactive features, website aesthetics, usability

Most Important Variables that Influence User Experience (in this order): esthetics, ease of use, and content

Criteria Checklist to be Assessed: consistency, simplicity, readability, aesthetics, eliminating jargon/clear terminology, enhancing tools