

Introduction to **Visitor Surveys**

How do you conduct a survey to find out more about your visitors? How do you process and present the results? This guide introduces you to visitor surveys - a vital research tool for your museum's planning and operations.

What **visitor surveys** are for

Getting answers

Visitor surveys are research. Research on your visitors can tell you:

- how many visitors you have, when they come, where they are from
- who your visitors are, what they want, what their interests are
- what they like and dislike about your exhibitions and activities.

Research on people who do not visit the museum can tell you why they don't come.

Getting results

Use the findings from your surveys to help you plan and carry out improvements in your presentation or services or facilities. Through these things you can encourage more visitors through the door.

Use your findings to ensure the success of your marketing, promotional and public relations campaigns.

Use your findings to add credibility to your case when you approach potential sponsors or funding sources to support your projects.

Know your visitors

This guide complements *Know Your Visitors*, Te Papa National Services Resource Guides Issue 3.

- *Know Your Visitors* looks at the purposes of gathering information about visitors and potential visitors and its uses in planning.
- *Introduction to Visitor Surveys* focuses on the research process.

INSIDE

- 2 Planning surveys
- 4 Designing a survey
- 6 Conducting a survey
- 7 Processing and presenting the results
- 7 Using the results
- 10 A sample questionnaire



EVERY SURVEY, EVEN THE SMALLEST, NEEDS TO BE CAREFULLY THOUGHT OUT FROM BEGINNING TO END.

Planning

surveys

The results of research can be of enormous value to you. But to make sure you get the best value, you need to think through the research, its purpose and its resource implications from beginning to end.

Seeking outside help

Research is complex and time consuming. If you're new to research, you may need to seek help from someone like a social science researcher to design questionnaires, conduct interviews, and process and interpret the results so that they are of value to you.

Balance the time and resources needed to do the survey against the use you will make of the information.

Keeping tabs on the process

However, even if you are contracting the survey out, museum staff will still need to be involved. You will need to undertake the briefing process, make a project brief to ensure all objectives are included, and monitor the contractor's progress and reporting.

Choosing research methods

There is a range of ways in which survey information can be gathered. Choose one method or a combination to suit your situation, your visitors and the type of information you wish to collect.

Be aware of the cultural differences of your survey group when choosing your research method - some will be more suitable than others. Whatever method you use, make sure you ask each person surveyed the same set of questions.

Face-to-face interviews

Information for improving many things about your museum is often best collected using face-to-face interviews. This is for instant feedback on matters such as customer service, atmosphere, design, exhibition presentation, traffic patterns, lighting, signage and merchandising.

Your visitors will recall and discuss details most effectively straight after their exhibition or museum experience. However, the face-to-face interview is also probably the most difficult, time-consuming and expensive way of surveying your chosen sample. Location is also important. Where and when you interview can affect the information you get.

Try to keep your questionnaire as short as possible to maximise participation and minimise inconvenience to your visitors.

Postal survey

Questionnaires are sent by post to selected people. This method can be the cheapest and is particularly useful with a large sample. Also, people who do not visit the museum can be questioned this way. Postal surveys give respondents more time to think through their answers.

Disadvantages are that response rates can often be as low as 10 percent unless there are several follow-up phone calls.

Other issues include the time that some people take to complete and send in questionnaires, and there being no guarantee that the person selected for your sample is the person who completed the questionnaire.

Telephone survey

This method is best suited to relatively short, simple surveys or as a prelude to selecting people for interviews. The advantages are that it is relatively cheap and can produce very satisfactory results with a higher response rate over less time when compared with other survey methods.

Problems associated with telephone interviews include respondents not being available at the time of the call, being unable to see a questionnaire or showcards, being distracted during the interview, and perhaps being less responsive on the telephone than face to face (but you may find they are more honest). This technique can also limit the amount of information collected.

Developing a project plan

Here is a structure for drawing up a research project plan.

- **Your aims**

What are you going to use the information for? This helps you define the aims of the survey.
- **Your objectives**

What do you want to find out? Your survey objectives need to be clearly defined. Try to keep them simple and specific.
- **Background**

Outline previous research and any other potentially useful information available on the topic.
- **Administration**

Identify who will manage the survey, who will do the interviewing and whether the survey is to be conducted once or repeated to test changes and discover patterns over time.
- **Financial breakdown**

Work through all the costs of the survey, including planning and interviewing time involving staff, and collating, interpreting, photocopying and presenting the results. Extra staff may be required.
- **Survey parameters**

Provide information on:

 - when the survey will be conducted, including dates and deadlines
 - when the results are required
 - who will be surveyed
 - the numbers in the sample
 - what questions will be asked
- the unit of measurement that will be used (for example, numbers or dollars)
- the required level of accuracy of the results (note that sample size affects accuracy)
- how the data will be processed
- how the information gathered will be presented and stored.
- **Sampling methods**

Provide information on how you will get an accurate sample, that is, how the people interviewed will be typically representative of the whole. This will include:

 - how you select the sample from your target population
 - the basis for your decision on sample size
 - how you will collect the information (for example, face-to-face interviews or by mail).
- **Questionnaire (if applicable)**

Provide information on:

 - how the questionnaire will be developed and tested
 - how you will ensure that data collected is consistent and accurate
 - how the procedure will be managed.
- **Outputs**

Describe the format the answers should take and how results should be reported, for example, text, tables, graphs.

Designing a survey



Simple and honest

Decide what you want to find out from your survey, then boil it down so that the important facts can be obtained with as few questions as possible. If a survey is too long, too complicated or both, you'll find that your interviewees will soon meet resistance.

Loaded questions can skew results and miss the real situation, leading to poor planning and costly mistakes.

Make sure the survey is honest. Start off with a 'know nothing' attitude so that the survey will gather new ideas. You need to take an open approach to the information you will gather, rather than attempt to prove something that is currently believed.

Avoid preconceived ideas about your results. Good surveys do not necessarily follow a perfect pattern, so it is important that the results reflect the actual patterns. If you are collecting complicated information, you may want to call in the specialists.

Confidentiality and informed consent

An important aspect of research is maintaining the confidentiality of the respondents' data. The information gathered should only be used for the purposes stated when it was gathered. You may need to reassure respondents on the confidentiality of their responses. You may consider getting them to sign a consent form if it is likely that you will want to use direct quotes from their responses. You will need parental consent when interviewing children. All data gathered need to be carefully and securely stored.



Keep your questions short and simple. Avoid jargon.

Designing a questionnaire

The points made here apply to all questionnaires, whether you are designing them for face-to-face or telephone interviews or as mail surveys.

For mail surveys, the questionnaire's appearance and the language used in it are crucial. Make sure the instructions are clear and that the layout makes the questionnaire easy to follow. The questionnaire has to stand on its own without any interviewer helping with the meaning of the questions.

Check it out

It is a good idea to have your questionnaire checked by a social science researcher. At the very least, test it on several independent people, checking for readability, understanding and ease of use before you launch it on your respondents.

Set the respondent at ease

Begin with simple questions that set the respondent at ease. Use clear, direct and everyday language that will draw the respondent into the survey. Define any terms, concepts and abbreviations that are used.

Make questions short and exclusive

Make the questions short and ensure that there is no overlap between the response options. Cover all possible answers and avoid confusion by making sure they fit the questions. For example:

Why do you come to the museum?

(a) to fill in time?

(b) because you enjoy the exhibits?

Combining these two ideas in one question would not provide a measurable answer.

Types of questions

Surveys include several types of questions. The most common are:

- open-ended questions where the respondent is invited to express their opinion and this is recorded verbatim
- closed questions where the response is defined, often to a one word answer or a tick box
- multiple choice questions where the respondent is given several responses to select from
- ratings where the respondent is asked to rate or rank a statement, for example, on a numeric scale or true/false/don't know/agree/disagree.



Avoid doubles

Avoid double questions, for example:

Did you visit the museum or the museum shop in the last year?

(Alternative: In the last twelve months have you visited (a) the museum (b) the museum shop?)

Avoid double negatives, for example:

Do you agree or disagree that museums are not up with the times?

(Alternative: Museums are not up with the times. Do you agree with this statement?)

Avoid loaded questions

Avoid loaded questions - the answers will not necessarily be what the respondent actually thinks. For example:

Do you think the exhibition is (a) excellent, (b) very good, or (c) poor?

(Alternative: offer a complete set of possible options, for example, excellent, very good, average, poor, very poor.)

Don't make assumptions

Don't assume a state of affairs, for example:

Do you ever come to the museum for a family outing?

(Alternative: Do you ever visit the museum (a) on your own (b) with family (c) with friends (d) with a group?)

Be consistent

Be consistent with your use of terms. Don't use 'recreation' in one question and 'leisure' in another. The respondent may think you are asking about different things.

Group questions logically

Group items into logical sections that follow on smoothly from each other. Avoid unrelated quiz-like questions

Prioritise your questions

Put your most important questions early in the questionnaire when the respondent is most likely to be giving the survey their full attention.

Number the items

Number the items so that responses are easily identified and collated. Numbering is particularly important in mail surveys so that the respondent is clear on the selection required.

Make sure to include appropriate instructions for skipping questions if the respondent is not required to answer every question.

Conducting a survey

Asking questions on the spot

There are various interviewing techniques you can use in face-to-face encounters. Use them on their own or in combination depending on how specific you want the information to be.

Conversational approach

Approach visitors in an interested conversational way to draw them out on what they are experiencing at that particular moment of the visit.

Spontaneous reaction

Invite a spontaneous reaction from visitors to what's around them, without prompting, for example, 'tell me about this exhibition'. By avoiding specific prompting, the respondent will share the most important influences on their visitor experience. Open-ended questions will give them an opportunity to develop their response.

Focused questions

More targeted questions determine whether specific objectives have been met, for example, 'Tell me about this museum space? What interests you particularly? Why? How do you think the items are presented? Why?'

Focusing on specific areas will determine why they feel the way they do, for example, 'You've said you think this exhibition is modern and up to date. Can you tell me why you feel this way?'

Draw responses on specific elements by prompting their reaction, for example, 'What do you feel about the lighting levels? What sort of atmosphere do they create?' or, 'Tell me about the presentation of the exhibits. Do you think they are presented to best advantage?'

Structured interview

On page 10 of this guide we have included an example of a questionnaire that you can use in a structured exit interview with visitors. This gathers information about both the visitor and their experience using a range of question types.

Survey by mail

Different types of questions can be asked in a mail survey. However, they must be specific and easy to understand.

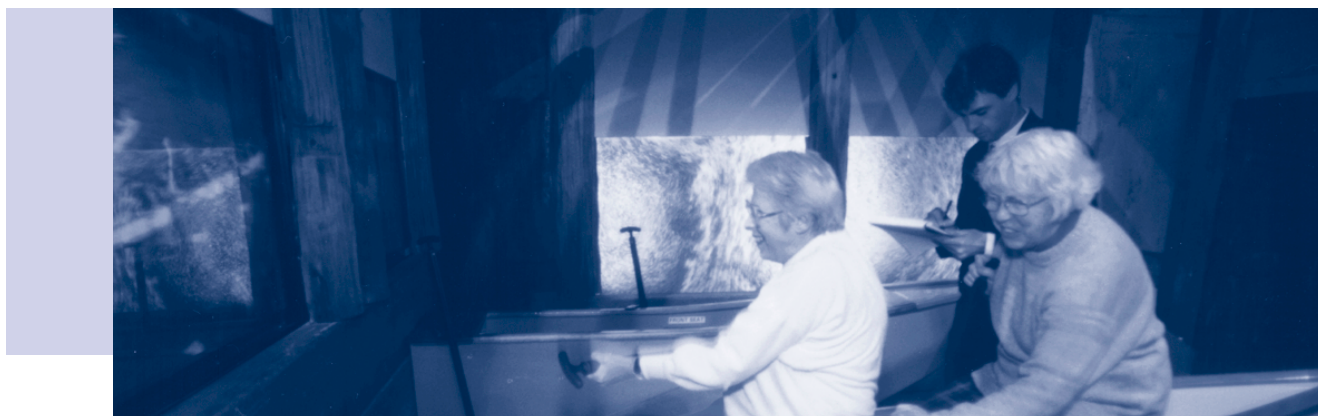
Remember that in a mail survey the respondent does not have an interviewer to explain the reasons for the survey or the approach taken. Everything depends on the appearance of the questionnaire and the language that you use.

Survey by telephone

Remember to give the interviewee enough time to respond. Also, when several questions are based on the same information, look at whether you need to repeat that information so the respondent can remember what the questions are about.

Processing and

presenting the results



Processing the results

Once you have completed the survey, the questionnaires will need to be coded and analysed. It is important to analyse the data with a view to making recommendations and being able to apply the findings to practical outcomes.

Store your data with care

It is essential to ensure that the data sheets are carefully and securely stored on completion of the research.

Reporting the results

The presentation of the results in a clearly written report helps to enhance the credibility of the survey. It may be a good idea to get a social science researcher to give you a hand - there are specific ethics involved.

If this is the first time research has been carried out, the survey will provide benchmark results for comparison with future surveys. From these you will be able to determine any changes that have occurred or measure the effectiveness of any development programmes.

Research report principles

- Keep the report simple and concise to ensure readability.
- Report all the results. The report will be more ethical and credible if it includes all findings, positive and negative. You have a responsibility to report the findings accurately.
- Consider including good quotes to illustrate respondents' feedback.
- State any weaknesses in the survey methods. There is no perfect method, so be sure to explain those imperfections.
- Some answers can be better explained if you relate them to outside statistical material. State sources clearly so that introduced data and actual results are not confused.
- Don't over-explain or extend the results. If you are including estimates of future patterns, ensure that it is clear how this was done.

Privacy

Take extra care to ensure that individual responses cannot be traced in the published report, especially if you use quotations.

Don't hide unpleasant results when you report - tell the whole truth.

Using the results

Planning

Information from your research informs and drives decisions about:

- better communications and marketing
- enhancement of your museum experience
- enhancement of your products and facilities
- enhancement of the ways in which your museum experience is delivered (for example, through better customer service standards, better exhibition design standards, better interpretative strategies and better pricing policies).

See *Know Your Visitors*, Te Papa National Services Resource Guides Issue 3, for more detailed examples of such uses.

See *How to Develop Your Strategic Plan*, Te Papa National Services Resource Guides Issue 14, for ways of incorporating research results into your strategic planning process.

Reporting to your stakeholders

Your research report can provide comprehensive information for your stakeholders when, for example, you approach a local authority with a funding application or you report to support groups such as the Friends of the Museum.

Use key elements of your survey and graphs of its findings in presentations to your stakeholders. This will help you to explain to your audience, for example, your current visitor base and what you're going to do to attract increased visitors and develop the business more effectively.

Report format

The following is a standard format for reporting a survey.

1 Executive summary

This includes the objectives of the survey, a definition of the sample population, an overview of the method used, the main findings in the research, your conclusions and the recommendations you are making as a result of the research.

This section should stand alone as an overall summary of the research project and results.

2 Introduction

This is a description of the survey. It should include the five Ws - who developed the survey, who was surveyed, what it's about, where and when it was developed and completed, and why it was conducted.

3 Project methodology

Outline the sample selected for the survey, the techniques you used, including how the survey was tested initially. Record how many responses were achieved, collected and measured, how many selected respondents

refused/did not complete the survey, when and how long the survey took to complete and the quality control methods to ensure that the survey results were accurate.

4 Project findings

Provide the actual results, responses achieved or not achieved, tables and graphs. Make sure you include the total number of the group presented. This will enable the reader to understand the findings and their overall significance.

Extra anecdotal comments may be added in the main text or an appendix.

5 Conclusion

This is your interpretation of the results.

6 Recommendations

Recommendations suggest outcomes and directions arising from the research results. They may include recommendations for future action, which could include further research.

A sample questionnaire

This questionnaire is based on a sample museum survey from The Marketing Mix by Sharron Dickman. Adapt it to suit the information you wish to gather.

Good Morning/Afternoon.

We are conducting a visitor survey today and we'd like to include your views. We were wondering if you'd mind taking about eight minutes to answer some questions on the museum. The results will be used to improve our exhibitions for our visitors. The results will be confidential - your name will not be recorded.

Visitor Profile

1. Have you visited this museum before?

Yes No

If 'Yes': Approximately how many times within the last two to three years?

When was your last visit?

How long have you been here today? (Hours)

2. What type of tickets did you purchase? (Please tick one or more boxes)

Adult Child Family
 Through the Friends Society With a group (eg, school trip, tour) Other

3. Who are you visiting with today?

On my own With adult(s) With adults and children
 With a group With family With friends

If visiting with others, how many in the group?

4. Will you visit any other attractions today?

Yes No

Did you visit anywhere else before you came?

Yes No

Will you be visiting anywhere afterwards?

Yes No

Response to Museum's Facilities/Exhibits

5. Did you make any purchases here today? (Tick as many boxes as appropriate)

Yes, at the museum shop Yes, at the restaurant
 Yes, at the special exhibition No

6. What facilities have you used today? (Tick as many boxes as appropriate)

Guided tour Reception Research facilities
 Bookshop Car park Café/Restaurant
 Toilets Other, please name

**7. Was there anything in particular you planned to see before you arrived?
If so, what was it?**

8. What did you enjoy the most about your visit today?

9. Was there anything you did not enjoy?

10. Was there anything you would like to see changed?

11. Please list the exhibitions in the museum that you have visited today.

12. Is there any particular reason you did not visit a specific exhibition?

13. Of the exhibits you visited today, which did you enjoy:

- the most?
- the least?

Potential - Return Visitation/Referral**14. Which statement best reflects your plans?**

- I will definitely be visiting again within the next 12 months.
- I will probably be visiting again within the next 12 months.
- I will probably not be visiting again within the next 12 months.
- I will definitely not be visiting again within the next 12 months.

15. Would you recommend this museum to others?

- Yes No

If 'Yes', who do you think would enjoy a visit?

If 'No', is there any particular reason?

16. How did you travel here today?

- Private car Hire car Public transport
 On foot Other

17. How did you hear about us?

- Recommended by friends/relatives Tourist information centre
 Tourist literature/brochure Have always known about it

(Where obtained?)

- Radio Television Newspaper
 Signs (Where?)
 Other (Specify)

18. Whose idea was it to visit today?

- My own Partner Child/children
 Parent Part of tour
 Other (Specify)

19. Are you a member of our Friends Society?

- Yes No

Demographics**20. Can you tell me where you live?**

Your suburb or town?

(If international, include what country)

21. Please indicate which age-group you belong to.

- Under 16 17-21 22-30 31-40
 41-50 51-60 61-70 Over 70

22. Sex

- Female Male

For Office Use:

Questionnaire Number:

Interviewer's Name:

Date:

Start time:

Finish Time:

Interview Duration:



Glossary

Anecdotal comment Anecdotes, quotes, observations and comments arising from or reported in the course of the research

Benchmark results Results that form a basis for comparison with later results

Credibility In the context of research, ensuring results are obtained in an unbiased way

Data sheets The forms on which the individual survey responses are recorded

Demographic A statistical characteristic to do with human populations

Exit interview An interview that takes place as the respondent leaves the site

Representative sample A range of survey respondents which accurately represents a particular audience

Sample population The group of people from whom you are drawing the survey sample

Showcards Cards illustrating something that relates to a survey question

Standardised interview An interview in which the same questions are asked in the same format

Further reading

Dickman, S. (1995). *The Marketing Mix: Promoting Museums, Galleries and Exhibitions*. Melbourne: Museums Australia. (An easily-read, practical 130-page book, available from National Services.)

Museum of New Zealand Te Papa Tongarewa (2001). 'Know Your Visitors'. Te Papa National Services Resource Guides 3.

Statistics New Zealand (1995). *A Guide to Good Survey Design*. Wellington: Department of Statistics. (A good reference guide which takes you through the nuts and bolts of a survey project.)

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For further information or to discuss training opportunities related to this topic, please contact:

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