

# Strategic Planning in the Woods: Applying the Results of Audience Research

Patricia Jelen  
The Morton Arboretum  
Lisle, Illinois

Jeff Hayward  
People, Places & Design Research  
Northampton, Massachusetts

## Introduction

High quality audience research, and the inherent value of knowing your audience, are not sufficient to guide an organization to respond to visitor data. The process of *applying* research results to decision making deserves as much attention as the process of collecting data, because without such attention the value of good audience studies may be lost, or reduced substantially. In this paper, we explore the factors which affect the process of applying research results, including leadership, resources, and incentives for change.

Strategic planning rapidly is becoming a widely-accepted practice among cultural and interpretive institutions. Essentially, it means taking stock of where we are, where we would like to go, and how we are going to get there. It is a process — and although it produces ‘products’ such as action plans and revisions of mission statements, the process is extremely important. At the Morton Arboretum, it’s tempting to refer to our strategic planning with cute clichés: “you can’t see the forest for the trees” (we needed to think about the big picture, not just the details of managing the grounds), or “strategic planning in the woods” (our offices are surrounded by our own forests and woods, and this is where we need to focus our planning). But regardless of how we refer to it, the strategic planning process is critically important because each member and component of the institution needs to work together to produce effective change; if

some parts of the institution don't "get it," and aren't working together toward the same ends, successful implementation will be limited if not undermined totally.

## Background

At The Morton Arboretum -- a 75 year-old, 1700-acre botanical museum of trees, shrubs and vines from around the world, located in the western suburbs of Chicago -- strategic planning is the key to a major cultural change. The Arboretum is turning its focus around, to extend its mission and message to the world outside its gates.

Although open to the public since its 1922 founding, the Arboretum first emphasized building its collection of 30,000 plant specimens representing 3,100 different types of plants. Then the focus shifted to developing an internationally recognized research program, solving new plant problems, and growing new trees. These inward-focused priorities led to the Arboretum's nickname of a "sleeping giant" — great stories to tell and resources to share, but not shared with the public. Most visitors were members coming from the area who considered the family-endowed Arboretum a private retreat.

But living things change. The need to more fully embrace the Arboretum mission to communicate the value of trees and woody plants to the general public led to tough questions: Who are we serving? Who should we be serving? Do visitors understand what an arboretum is? What makes this place special and important in today's world? (Figure 1).

In 1992, the Arboretum developed its first strategic plan, focusing on the years 1993-1996. This strategic plan targeted key questions with clearly defined goals and objectives which would lead to a major cultural change for the institution, the way it is perceived, and who it reaches. The need for systematic audience research was outlined in that plan, and a comprehensive visitor analysis was conducted in 1995.

## Methods

We decided our needs for information about audiences should begin with an analysis of current visitors. Some requirements included: a multi-season sample, a sampling procedure which would represent accurately the audience despite the multiple exits and an overlapping entrance path,

a sample of the entire visitor audience (including members, who do not pay admission and sometimes don't stop at the gatehouse), and representation across times of day and days of the week.

Next, our research consultant (People, Places & Design Research) developed a strategy whereby 'entrance interviews' would be used to define the composition of the visitor audience, since the gatehouse was the only point on the site which every vehicle had to pass at least once. 'Entrance interviews' would also be used to obtain information about decisions to visit the Arboretum and about expectations, while 'exit interviews' would be used to gather information about today's visit and future interests. (The demographics of the exit sample would provide a reliability check of the entrance sample, with the potential to be adjusted if necessary to match the 'entrance' sample [wasn't necessary]). The final three-season sample included approximately 2,500 visitor groups.

In-depth analysis and interpretation of the data revealed several patterns of great interest. For example:

1. Member visits dominate attendance, representing more than half of attendance counts (this is markedly different from almost all cultural institutions, which attract mostly non-members and a general public audience);
2. We have low percentages of first-time visitors, and visitor groups with children (also different from many cultural institutions);
3. The audience is attracted by seasonal change, e.g., spring flowering and fall tree color, but non-members, especially, do not seem to be drawn to the summer;
4. We attract almost twice as many women as men (Figure 2); and
5. A useful way to understand the diversity of our visitor audience is to compare first-time visitors vs. infrequent visitors vs. frequent visitors.

Although the point of this paper is not to present the data from the visitor analysis, it may be helpful to give an illustration of how the results have helped us reflect on our expectations and assumptions. For example, the researchers asked visitors how much time they spent at the Arboretum and how much time they spent in their cars — because some staff believed that visitors spend most of their time driving around, without making the effort to get out and explore the grounds. In fact, the data set was

sufficiently detailed to provide a thorough analysis of this issue. As illustrated in Figure 3, people who make short visits to the Arboretum do spend a considerable proportion of time in their cars, but with longer visits the time in the car is about the same, indicating there is a “threshold” of time required to drive around the site, but that most visitors spend their additional time *experiencing the grounds*. This process of responding to staff questions has been essential in helping to inform our understanding and to confirm our intuitions about the audience.

### **Beginning the Process of Applying the Results**

It became clear that many long-held perceptions would be challenged by the data although the research was not designed to be confrontational. These initial reactions were eclipsed by a growing interest in the results and a natural curiosity to ask more questions -- questions this strong data set was able to answer.

The challenges to applying research results at the Arboretum include how to get staff, particularly busy front-line staff and middle managers, to pay attention to the data as they make key daily decisions, instead of relying on long-held perceptions and patterns. Challenges to the Marketing Manager, considered the “keeper of the data” or key user, involve explaining the data without implying staff inability to comprehend it, validating the research to botanical/biological researchers, and aiding Arboretum leaders to incorporate the outcomes in decision making, without dictating or limiting those decisions.

Another challenge lies with avoiding misinterpretation of the data. Interesting interpretations to date include a key administrator who believes the visitor analysis clearly defines what projects should be funded and in what order; and a special events coordinator who says the data tell her to go after the missing audience and uses the study to justify that approach.

Putting the data to work began with the marketing program while the three-season data collection was still underway, including these efforts:

1. Updates to leadership throughout the process.
2. Season by season preliminary results reviews at managers/directors staff meetings.
3. Data guided concurrent Master Site Plan decision making.
4. Seasonal data use in support of federal and foundation grant applications.

The process then expanded as the final report outlined key points and indicated major trends across the seasons to include:

1. Presentation of research results and process by the Executive Director to annual "State of the Arboretum" address.
2. Presentation and discussion of key findings by the Marketing and Visitor Services Manager to administrators/leadership level of staff.
3. Final report including Executive Summary distributed to the Board of Trustees and full staff.
4. A 'poster' presentation at AAM conference, re-presented at staff and strategic planning meetings.

Key findings were critical for Arboretum staff with direct visitor contact:

1. Presentations to Gift Shop and Restaurant Manager.
2. Overview of results considered in terms of membership, and summarized for 11,000 members in newsletter.
3. Visitor research incorporated into staff orientation, for new Membership and Visitor Services Coordinator and Plant Information Specialist, and will be used for future Public Relations Coordinator.
4. Guideline for theme/photo selection for membership program materials and promotional video script/scene development.

The results support future planning for the backbone of our 75th anniversary celebration, including media purchasing. They were also pivotal in the current strategic planning meetings for 1997-2000, as well as budget development.

Ultimately, we realize that applying the results of visitor research means reflecting on our goals, assessing strengths and weaknesses, incorporating this perspective into our deliberations about possible directions for the institution, and tying it in with our action plans.

## Discussion/Implications/Principles for Successful Implementation

Within the first few months following the visitor analysis we initiated an ongoing process for applying the results, which is serving us well now and should continue to serve us in the future. We can point to several features of our process which have helped us and may help other institutions to be effective users of data:

1. Begin planning for implementation *before the research is conducted* — we sought input from approximately 20 senior staff when deciding what issues to address in the visitor research; this helped lay a foundation for their awareness of the research process later, so that the presentation of results was not the first time they were involved.
2. Consider possible applications to *all planning and management efforts* — part of our strategic planning initiative included a Master Site Plan, and we asked our design consultants to respond to the research results too; similarly, when we conducted focus groups for audience development, that researcher began with the benefit of understanding our existing audience.
3. *Repeated presentations* of research results are essential — since we did not want the research to be secret information held by a few top administrators, results were presented at all-staff meetings, executive committee meetings, department head meetings, and to the Board; these repeated presentations encouraged people to review the information more than once, and to ask questions about the meaning and value of the data, as well as about institutional priorities which might be related to or affected by the data.
4. Leadership by the top administrator -- beyond “acceptance” of this process, our Director supported and encouraged the use of this systematic visitor analysis; his leadership guaranteed there would be ongoing attention to the results, a presentation would not be dropped from an agenda because we never got around to it, and management and planning decisions would be discussed in terms of our goals for audience development and enhanced visitor experiences.

5. Identifying some initial *examples of applications that people can agree on* — the volume of useful data from our visitor analysis could be perceived as overwhelming by some people, and it was very helpful to find some specific examples of data where it was easy to agree on recommendations; in our situation, one of these examples was the main entrance, which will be redesigned because we found out how few people (aside from our members) really know what an arboretum is.
6. Consciously creating *opportunities for discussion* by staff — at all levels it is important to follow data presentations with opportunities to talk about the data; such discussions allow people to ask questions about the results or the process, add to the list of possible applications, and agree on the interpretation of the data (since misinterpretations of the data due to hidden agendas are likely to undermine the need for cooperative implementation of a shared vision).
7. Creating a *system of facilitating applications* — beyond all our good intentions, implementing our vision can be sidetracked by dealing with day-to-day operations; however, because we have required ourselves to refer to visitor data when justifying budgets and new initiatives, we hope to have an ongoing system which encourages us to have a record of suggested applications, measure change, and recognize and reward decisions which are based on data.

Ultimately, we believe our experiences using visitor research to inform strategic planning and physical site planning have improved our decision making at a management level. Clearly, the process of what you do after the data are collected is something that you have to plan as thoroughly as you planned for the data collection.

**Figure 1**



The first comprehensive analysis of visitors to The Morton Arboretum in suburban Chicago both confirmed beliefs and challenged perceptions, which has led to a greater understanding of visitors and provided a critical tool for future planning for them.



**Figure 2 (above) and Figure 3 (below)  
Visitor Analysis at The Morton Arboretum**

