

Chapter 13

THE AUDIENCE RESEARCH CONSORTIUM OF TORONTO

Consortium Member Institutions

Art Gallery of Ontario
Royal Ontario Museum
Ontario Science Centre
Metropolitan Toronto Zoo

Consultant Services

Woods Gordon Management Consultants
Toronto, Ontario

The Art Gallery of Ontario, the Metropolitan Toronto Zoo, the Ontario Science Center and the Royal Ontario Museum currently attract a combined on-site attendance of over four million visitors annually, plus another three million through our outreach programs in the Province of Ontario. While this is a significant figure, there is a shared vision of attracting a larger and more diverse audience—one that includes nontraditional and multicultural groups. To this end, staff members responsible for Exhibit and Program Development, as well as the Marketing in these institutions, have recently formed an Audience Research Consortium.

At the Art Gallery of Ontario (AGO), visitors are welcome to roam through twenty public galleries representing all the great traditions of Western Art, ranging from Old Masters to Canadian and International Contemporary works drawn from a Permanent Collection of over 15,000. Of particular interest is the Henry Moore Sculpture Center, housing the largest and most comprehensive public collection of Moore's work in the world; and the Canadian collection, spanning 200 years of Canadian cultural history and rich in works by the Group of Seven. The Grange, also part of the AGO, is a "living museum" restored to a gentleman's house of the 1830's.

The Metro Toronto Zoo is considered "One of the Ten Best Zoos in the World". This 710-acre site exhibits over 4,000 animals of 400 species arranged in "zoogeographical" regions. These regions are found in four major pavilions and surrounding paddocks and include Africa, Indo-

Malaya, The Americas and Australia. There are daily "Meet the Keeper" events and a "Free Flying Bird Show".

Hosting more than 25 million visitors over the past 20 years, the Ontario Science Center offers the public an opportunity to explore, experience and enjoy elements of science and technology that are usually inaccessible or too complex to approach in other contexts. From old technology to the theatrical, hair-raising demonstrations to a one-on-one discussion with an expert model builder, the Science Center attempts to provide its various visitors with an engaging and enjoyable experience.

The Royal Ontario Museum (ROM) is one of the few museums in North America to combine art, archaeology and science under one roof. With a collection of six million artifacts and specimens, the ROM attracts over one million visitors a year. The ROM is composed of the main museum building, the McLaughlin Planetarium, the Sigmund Samuel Building of Canadian Decorative Arts, and the George R. Gardiner Museum of Ceramic Arts. The ROM's most popular galleries and collections include a diverse range of subjects from dinosaurs to minerals and Egyptian mummies. Internationally, the ROM is recognized for its outstanding Chinese collections and its many scientific research contributions in such areas as geology and the environment.

As you can see, the Audience Research Consortium represents four major attractions in the Metropolitan Toronto region. However, Toronto is a growing cultural center and the competition for leisure time and audience share is also growing.

This competitive atmosphere has made it necessary for our institutions to strive for an edge and comprehensive knowledge and understanding of our visitors and non-visitors is essential.

We know from existing research at these facilities that despite some audience overlap, different types of visitors are drawn to the various attractions. The reason for this remains in the realm of speculation. Are different people attracted to the novelty of technology at the Science Center, the contemplative quiet at the AGO, the historical learning at the ROM, or the peculiar traits of rare animals at the Zoo? Is educational background a factor in attendance? If so, how? What determines the rate of repeat visits? How much "informal education" actually takes place at each attraction? Can our current approach to public programming be altered in order to better address the needs of those who don't currently visit but may? Answering these and many more questions is the goal of the Consortium.

By analyzing the experiences of visitors to the four attractions, we will learn what types of programs are most effective at each institution, and what might be adapted to programs at other institutions, thereby creating a foundation for audience development. This scale and depth of research, to our knowledge, has not been undertaken before in Canada.

The Consortium is a means by which we can collect relevant data on a consistent basis. The results will be shared not only by the participants, but also with other institutions.

Museums and museum-related organizations are entering a new phase in their development. In the past, public programming has been determined largely by specialists in the areas of institutional collection – art historians, historians, scientists, etc. These programs have been developed from the perspective of the highly focused expert, which at times does not take into account the needs of a general public. With the growth of museological expertise in the areas of education, marketing, exhibit design, etc, it is possible to more effectively develop programs which are targeted at particular audiences (i.e., the novice visitor). Consortium members have the ability to develop such programs, but need accurate information about users in order to do so.

The Planning Phase

In the summer of 1987, the Art Gallery of Ontario conducted some audience research into the quality of visitor experiences in some of its exhibition galleries. This audience research led to an idea for a Consortium of major attractions in the Toronto area which could co-ordinate research initiatives and be of mutual benefit. The original focus of the research was on visitor experiences with a view to understanding optimum environments in which to achieve both institutional public programming objectives, and a public goal with respect to leisure-time activities.

After preliminary discussion amongst AGO staff on the feasibility of forming an Audience Research Consortium, it was decided that the AGO would approach the Royal Ontario Museum, the Ontario Science Center and the Metropolitan Toronto Zoo to discuss the possibilities. These organizations were approached because they shared the following characteristics:

- A public education mandate.
- Collections.
- Research activity.
- Communication through exhibits.
- Large staff with both collection-based experts and marketing experts.
- Experience with various types of audience research.

This research proposed by the Consortium was designed to ask critical questions about the nature of the visitor's experience in an effort to understand what constituted a "successful" encounter with the exhibits at each site. All sites contacted were interested in participating in discussions concerning the feasibility of an Audience Research Consortium. These

discussions led to the development of terms of reference, or a set of guidelines, which outlined the goals and objectives of the newly formed Consortium.

It was agreed that the aims of the Consortium were:

- to research the relationships of the current and potential audiences (demographic, behavioral and attitudinal profiles) at the Metro Toronto Zoo, the Ontario Science Centre, the Royal Ontario Museum, and the Art Gallery of Ontario to the programs and products which these institutions provide;
- to develop research expertise and facilities so that each institution can assess the effectiveness of its exhibits and public programs;
- to use the research findings in the development of public programs and marketing strategies specifically targeted at nontraditional user groups and multicultural audiences so as to improve their access to these institutions;
- to establish coordinated audience research activities at the four major Metropolitan Toronto attractions;
- to assess the impact of potential visitation factors, (such as seasonality, weather, time of day, etc.) on visitor trends at each site;
- to set up a data base network for audience research so that each institution can gain access to comparable and accurate information which can be used by participating institutions to develop its programs and products;
- to develop in-house expertise and resources to conduct audience research.

All along, the Consortium planned to hire an expert to conduct audience research, as well as provide general guidelines for the development of future exhibits and public programs. The structural organization of the Consortium was developed by the Coordinating Committee. This committee, initially intended to include two representatives from each organization (but since has expanded) – one from the Market/Communications area and one from the Public Programming/Exhibit Development area – is responsible for ensuring that the goals and objectives of the Consortium are met. The roles of the Consultant in the original terms of reference were as follows:

- to design, execute and analyze studies, in cooperation with the Coordinating Committee;
- to advise and bring expertise to the Coordinating Committee in the area of audience research;
- to provide for:

- data collection
- data entry
- data analysis – comparative between institutions (using paid or volunteer staff, as appropriate);
- to supervise the collection of data;
- to train and/or assist staff at each institution in the design of research proposals and strategies;
- to train and/or assist staff at each institution in the setting of databases for analysis of collected data;
- to advise the Coordinating Committee on matters related to the project;
- to carry out the instructions of the Coordinating Committee;
- to assess and utilize human and other resources available at each institution.

Funding

After the Consortium met a number of times to review the terms of reference and to define the scope of the project, the issue of funding became an urgent priority. Where were we to find financial resources required for such a large, ongoing undertaking? The project was planned to continue over three years and initially involved the purchase of a substantial amount of computer hardware.

Two members of the Consortium agreed to undertake the initial search for funding. Past experience indicated that the normal routes would not bear financial fruit. Audience research did not normally attract enthusiasm from traditional funding sources. However, members of the Consortium believed that the uniqueness of the project might make it an attractive proposal – chiefly because one of the major thrusts of the project was to look at what would later be defined as "nontraditional user groups" (multicultural groups). That somewhat awkward terminology proved important when the Consortium had to face the segmentation and definition of who were, or were not, regular visitors of the four institutions.

The terms of reference were defined and generally agreed upon by January, 1987. In February, the Consortium sent the terms of reference and cover letter requesting funding to its "parent" agency – the Ministry of Culture and Communications, the provincial ministry responsible for funding three of the four organizations. As a City of Toronto attraction, the Metro Zoo is not funded by this ministry. Members of the Consortium knew in advance that their ministry would not have the financial resources to fund the proposal. Through earlier investigation, however, they knew the Ministry of Citizenship had funds available for projects that would ultimately lead to the development of programs for "nontraditional user groups". The proposal to the Ministry of Culture and

Communications made it clear that one of the primary objectives of the study was to develop long term strategies (based on the research results) that would lead to programs that could increase accessibility for nonusers. What the Consortium also knew was that the Ministry of Citizenship could allocate money to the Ministry of Culture and Communications for this project. That is exactly what happened. On behalf of the Consortium, the Ministry of Culture and Communications applied for and obtained both first- (and ultimately second-) year funding. The only significant request that was denied was money for computer hardware since it is not within government funding guidelines to provide financing for capital expenditures. Another stipulation was that the Metro Zoo obtain proportional funding to contribute to the project from their parent agency, the City of Toronto. By the summer of 1988, year one funding was in place. Year two funding was confirmed in early 1989.

Consultant Selection

With the funding secured, the task of contracting a consultant became the next major step. Consortium members drew up a list of nine consultant firms. This list was established by the members based on our knowledge of these firms, their work, and/or experience working with these consultants. Letters of invitation to tender were sent to nine Ontario-based consultants, along with the terms of reference. Included in this package was an invitation to attend a briefing session with Consortium members. The criteria for evaluating the firms was also reviewed. This criteria was established with emphasis placed on technical knowledge (40%); sensitivity to institutional issues (15%); terms of reference set by the consortium (10%); sensitivity to define potential audiences (20%); and qualifications of the team (15%).

A deadline for proposal submission from the consultants was set and proposals were received from seven of the nine firms.

After Consortium members individually reviewed the proposals, a preliminary screening meeting was held, and each proposal was discussed and evaluated. Three proposals were short-listed from the original eight submissions.

The three firms selected were then invited to make a presentation to the Consortium members. Each consultant was given one hour for the presentation and to answer any questions from Consortium members. The Consortium members, having reviewed the proposals and presentations, were asked to individually rank the proposals following the established criteria. The successful proposal was submitted by Woods Gordon Management Consultants of Toronto and work with the consultant began immediately.

The Consultant's Role

The role of the project consultant breaks down into five key areas:

- Advise the consortium on methodology;
- Manage data collection;
- Manage data analysis;
- Advise the consortium on data interpretation;
- Assist with production and preparation of reports.

The first of these roles involves *advising the Audience Research Consortium regarding basic survey methodology*, and the application of survey sampling and statistical techniques to the data collection required in order to meet objectives. Woods Gordon has been involved in hundreds of surveys for a wide variety of groups (including museum and park visitors, households, members of clubs and organizations, men and women on the street, etc.)

A useful role the Consultant should play is to advise the Consortium on the advantages and disadvantages of alternative methods of collecting the required data. This process has been adapted and modified as the relationship with the Consortium developed in the past several months.

From the perspective of the consultant, it has been a most productive interchange as many of the members of the Consortium have considerable experience in survey sampling of their own. This sharing of ideas and "team approach" to developing the best possible research methodology is advantageous for both the consultant and Consortium.

The second major role of the consultant is *managing the data collection* itself. This is one of the major tasks involved in the first year of the Audience Research Consortium initiatives. The logistics of data collection, including developing the survey schedule, identifying staff and volunteers to collect data and do surveys, insuring survey forms and pencils are available, arranging areas where children can play, etc. – these are all key concerns in managing the data collection effectively. The consultant's job, of course, is to coordinate the data collection for all four of the institutions. In doing so he works closely with one individual from each institution who is the "on-site liaison" for data collection at that particular location. The next role is in the *management of the data analysis*. Here, the consultant's responsibility is to direct the initial analysis of the data, in terms of specifying the frequency responses, cross tabulations, and any other types of analyses that are required. This clearly related to the first role addressed, which is to advise the Consortium of methodology.

The consultant's role is to then advise the Consortium on the *interpretation of the data*. Here again, he is a team player, as are the other individuals involved. His experience in assessing survey results from many other questionnaire and survey exercises is useful in this area,

especially when combined with the particular museological expertise of other Consortium members.

Finally, the consultant must assist the Consortium with the *production and preparation of the various reports and outputs* from this Audience Research Consortium initiative. As already indicated, a key concern of the ministries funding this work was that any useful findings (in terms of results or methodological approaches) would be conveyed to other cultural institutions across the province. Here the consultant's role includes the preparation and production of research reports and other written outputs as required. The consultant will also be investigating the utility of other kinds of output media such as videotapes, slide presentations, etc.

To summarize, the consultant's role is twofold. The first is to act as a team member with the Consortium members discussing and debating the merits of one approach versus another, and to interpret the various survey findings. As joint research, this is a relatively new area; there are few precedents for many of the decisions that are being made, and therefore, no absolutely correct answers. Secondly, the consultant's role is very much as an employee of the Consortium: to undertake the research required according to the direction of the groups as a whole.

Approach Developed

Let us now discuss the original approach to the analysis that was developed in the proposal to the Audience Research Consortium. As previously indicated, one of the research goals was a better understanding of motivations, expectations and reactions of visitors to the institutions, and the identification of ways to encourage cross-visitation. The research also intended to investigate the potential of encouraging nonvisitors to become visitors through exploration of their perceptions, attitudes and motivations.

Central to the first objective was a concept of the combined audience. Here, the emphasis was upon developing a better understanding as to the characteristics of the general population who were visitors to one or more of these four institutions. This approach also recognized that there were various subcombinations possible – sixteen, in all, representing different combinations of attractions that members of the combined audience may have visited.

Furthermore, the Consortium wanted to examine seasonal differences in attendance at the various attractions. Previous museological research has, in fact, indicated that there are major market differences from one season to the next (e.g., Hood, 1988).

To meet the above objectives and to clearly define the characteristics of this combined audience, the following research program was developed in the proposal. *First*, the research was built around a base audience

survey to be undertaken four times a year, corresponding to each season. Here the initially proposed sample size was 400 at each of the four institutions, making for a total base sample of 1,600 interviews, four times a year. A *second component* was a nonuser survey which involved a statistically representative sample of households throughout the greater Toronto area. This was to provide information on the motivations and expectations, etc., of the nonvisitors. A *third component* is related to what was called visitor probes. These were to be added onto the base surveys which were undertaken every season. The visitor probes were, in essence, a second part to the base questionnaire which, for selected visitors, probe into more detail relating to their motivations and expectations. Three such visitor probes were proposed: one for frequent visitors, a second for first-time visitors, and a third for tourists. A *fourth component* of the research was to undertake depth interviews, or focus group sessions. At the time of the proposal, the specific topics to be discussed were not identified in detail. Provisions, however, were made for two such focus groups or depth interview sessions. Finally, the *fifth component* of the research was to set in place a longitudinal tracking study to examine the long-term repeat patterns of first-time visitors (i.e., to ascertain whether or not they were in fact coming back to the institutions). All the information collected will be going into a large scale database. Over time this will grow and develop so that comparisons can be made easily.

Research Plan

Initial emphasis was placed on first-year activities – a reflection of the yearly funding base. Work on the research plan was slowed down for six months so the first demographic study could be tested and completed, and work fully resumed this past February. There is now a three year framework in place.

The process for determining this research plan allowed for consideration of a very broad scope of questions, so as not to eliminate potentially significant areas for research. The project team formulated relevant research questions, 38 in all. These questions were then grouped into naturally-emerging categories of audience demographics, motivations, attitudes, reactions, and behavior (i.e., remaining aspects of behavior not covered by the preceding). The number of research questions for each category ranged from six to ten.

In the next step of the process, a chart or spreadsheet with four columns was created. Research questions were listed in the left-hand column, followed by a list of factors (if any) that the team was assuming as relevant to the questions. For most of the questions this column noted that relevant factors would emerge through qualitative inquiry to form the

basis for hypothesis testing. The next columns listed possible study methodologies and analysis strategies.

The project was reduced to a more feasible size by placing research questions for each category in order of priority. In making these decisions, team members considered the following:

- whether the question met the project's objectives;
- whether it met the Consortium members' needs;
- whether it was already answered through studies done elsewhere or at any of the four participating sites;
- whether it enabled comparison of the four sites to be made;
- whether it met the funding agency's original terms of reference.

Ten research questions which would involve undertaking a staff survey and a longitudinal study were deferred for post-project research. The remaining research questions were reorganized into groups according to type of study, with several questions falling into more than one group. Since the questions were now designated as first, second, third, and lowest priority, decisions about implementing the research plan can be readily made. The project team now has a tool to work out the specifics of studies for the remaining two and a half years.

Preliminary Findings

In the initial analysis of the base survey the responses were broken down into a number of areas. In addition to examining the total survey response gathered, in terms of overall frequencies and responses to the various questions, the following groups were isolated and identified:

- **Institution**
- **Frequency of visit** – two key groups: first-time visitors and repeat visitors to the institution.
- **Visits to other institutions** – three groups: visitors who had never been to any institution; those who had recently been to any other institution; and infrequent visitors to any or all other institutions.
- **Members** – three groups: those who had a multiple membership (i.e., individual or family memberships in two or more of the institutions); those who had a membership at only one institution; and those who were nonmembers.
- **Reason for visit** – in the survey a question was asked about people's motivation for their visit. The various responses that were possible could be generally grouped according to specific reasons (i.e., to see a particular show or event) and general reasons (i.e., reasons that couldn't be attributed to anything specific but related to a more generalized desire to visit the facility at some point).

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- **Length of stay** – short visits (those staying one hour or less); medium visits (those staying more than one hour but less than three); and long visits (those staying three or more hours).
 - **Age** – three groups: young (those where the respondent was 29 years of age or less); medium (those in the 30-59 category); and old (60 or more).
 - **Education** – two groups: those with some university or community college; and all others.
 - **Origin** – three groups: residents of the Metro Toronto area; residents elsewhere in the province; and residents in countries other than Canada.
 - **Learning Type** – several questions were asked at the end of the questionnaire on the base survey in order to investigate the type of learning people enjoyed most. The purpose of this was to identify, at least in a preliminary way, three groups of individuals: those who felt most comfortable with cognizant-type learning; those who felt most comfortable with affective-type learning or experiences; and those who preferred learning via some participative experience.
 - **Occupation** – five occupational categories were identified: student, homemaker, employed, retired, and other.

Reference

- Hood, M. (1988). Arboretum visitor profiles as defined by the four seasons. In S. Bitgood, R. T. Roper, Jr., and A. Benefield (Eds.), Visitor Studies – 1988: Theory, Research, and Practice. Jacksonville, AL: Center for Social Design. pp. 84-100.