

# Chapter 1

## PROFESSIONAL ISSUES IN VISITOR STUDIES

Stephen Bitgood  
Jacksonville State University  
Jacksonville, Alabama

We are at a critical point in visitor studies. We need to take time to reflect on the developing profession, if indeed it has reached the status of a profession. This paper will attempt to summarize some of the professional issues that many of us are and have recently been discussing with respect to visitor studies. Many of the papers in both this year's and last year's Conference deal with or dealt with these issues. Ross Loomis' (1988) paper last year is a good example. He suggested three indications that visitor studies has become a distinct field:

- The existence of a large number of workers involved in the field.
- Institutional commitment to visitor studies as evidenced by the growing tendency of museums and zoos to hire visitor evaluators and other visitor-related individuals.
- A separate body of literature as evidenced by the ILVS Bibliography, Visitor Behavior, and other publications that frequently publish visitor studies manuscripts.

In addition, Loomis reviewed the diverse activities involved in visitor studies: research/evaluation, surveys, market research, learning research, and environmental research. He also cautioned that we have three important issues to resolve: "The question of who should do evaluation and research"; "The problems with visitor research methodology"; and "The applicability gap" or the problem of putting research into practice. These professional issues raised by Loomis in 1988 have reappeared in many of the papers at the 1989 Conference.

Why should we be concerned about professional issues? *Professional issues are important because how we deal with them will have a profound effect on what visitor studies becomes and how it is perceived by others.*

Although I have titled this paper "Professional Issues in Visitor Studies", some may argue that there is not really a profession called "visitor studies" and thus we do not need to discuss professional issues. We could debate whether or not we are members of a profession called

"visitor studies" and such a debate may be worthwhile at some other time and place. The fact that close to 200 people met in Dearborn, Michigan, to attend the 1989 Visitor Studies Conference may be indicative of an emerging profession or discipline. However, in the final analysis, I would argue that whether or not we are now a profession, the issues raised in this paper must still be considered.

We could also debate the definition of "profession." This term usually refers to an occupation: (1) involving the attainment of special knowledge; and (2) having applied, practical emphasis. However, we have professional role conflicts that make it difficult to associate with any one profession rather than another. For example, I have academic degrees in the area of psychology which makes me part of the profession of "psychology." But, don't confuse me with the profession of "clinical psychology." In addition, I am particularly interested in a subfield of psychology called "environmental psychology." However, many environmental psychologists study topics about which I have little knowledge—for example, environmental stress, weather, air pollution, territoriality, and population density. My subfield of environmental psychology is "environmental design," which is a multidisciplinary approach that includes psychologists, architects, geographers, anthropologists, educators, interior designers, planners, sociologists, and urban designers. Is "environmental design" a "profession"? Why not? We have our own organization, the Environmental Design Research Association.

Most of the work I do involves studying visitors in museums and zoos. As a result, I probably have more in common with museum and zoo professionals than I do with other areas of psychology or environmental design. Given all of these conflicting roles, what is my professional identification? Stating that I am a member of the profession of "psychology" really doesn't say very much and makes me a little uncomfortable because people expect me to give them therapy. I'm more comfortable with the identity of "environmental psychologist" or "social design" specialist, or "visitor studies" specialist. Perhaps we should distinguish between "profession" and "professional identity."

Before moving on to the list of professional issues, I would like to make a brief argument in favor of professionalism in visitor studies. Some of you have questioned whether or not we really need another professional identity. Don't we have enough? We have AAM, AAZPA, ASTC, AASLH, AEA and who knows what else!

Consider, however, some of the advantages in having "visitor studies" identified as a professional field. First, as a recognized professional in the field of visitor studies, your activities on behalf of visitors may be taken more seriously by others. It is a characteristic of human nature to attach labels as a way to identify people's profession. Some labels are associated with status and prestige (e.g., executive,

physician) while others have more negative connotations (e.g., car salesman, politician).

A second advantage of a "visitor studies" profession is the possibility of additional resources for its practitioners. Professions offer resources that nonprofessions cannot provide. These resources include a body of literature, conferences and meetings to obtain and share information, resources for professional development such as workshops and seminars, and peer consultants. Although many of these resources may be available without the presence of a distinct profession, such resources are limited and may be provided as an afterthought by some larger profession. The American Association of Museums may offer resources for those interested in visitor studies, but the time, money and energy for developing these resources must compete with other special interest groups. Thus, resources from AAM may be limited. However, the development of the AAM Visitor Evaluation and Research Committee is an important step toward professionalism in visitor studies. It may be of special importance that this is a "Standing Professional Committee." I expect that the Committee will continue to play a key role in visitor studies. I hope the Committee is willing to embrace all of the various relevant sub-disciplines in the visitor studies movement, such as education, public relations, and exhibition and graphics specialists as well as professional evaluators, administrators, and any others who deal with visitors.

A third benefit of developing professionalism is that a profession provides organized marketing of its membership and its professional goals. Can you think of a professional association that is *not* actively engaged in public relations activities designed to help to market the profession? These activities may involve lobbying legislative bodies, informing the public, or providing press releases to mass media.

A fourth benefit is that a profession sets standards of practice. More will be said about this later. Briefly, however, it is important that there be a set of standards for professional behavior in order to minimize incompetent and/or careless practitioners.

## Professional Issues

Having argued for professionalism in visitor studies, I offer a list of issues that need to be considered.

### 1. The definition of visitor studies

One of the most basic issues for us is to define the field of visitor studies. Harris Shettel's "Statement of Goals" for the AAM Visitor Evaluation and Research Committee is a useful starting place. I believe

that the "Statement of Goals" implies four fundamental assumptions of visitor studies:

- Visitor advocacy: our major mission.
- Multidisciplined view: the focus of our approach.
- Formal evaluation: the way we answer questions.
- Scientific: our methods and theories.

**Visitor advocacy: our primary mission.** *Visitor advocacy is our primary mission.* Visitors should play *the major role* in the design of both exhibitions and programs. Traditionally, this has not been done. In the "Statement of Goals" of the AAM Visitor Evaluation and Research Committee, Harris Shettel described our advocacy mission accurately:

"The fundamental problem in the traditional approach to the development of exhibits and other forms of informal learning activities that are intended to communicate to the casual visitor is the absence of a formal channel of communication from the casual visitor .... It follows that efforts to improve the quality of such activities ought to be predicated on the notion that the most useful indications of effectiveness are those that are derived directly or indirectly from casual visitors themselves." ("Statement of Goals" p. 1).

Shettel (1988) argued that traditionally "...visitors have no constituency to represent them. They are not in the loop, and one can ignore them with impunity" (p. 27). Before the visitor studies movement developed, this was true. However, I believe that collectively we are creating a dramatic change. We are beginning to place visitors in the loop. The exponential increase in visitor studies during the last few years gives testimony to the fact that visitors are beginning to be heard (Bitgood, 1988).

At times, the advocacy role requires that we speak for visitors. Since we are perceived as experts on visitor behavior, we are constantly asked how visitors will respond to an exhibit or program. There is a danger, however, that we might substitute our own subjective opinions of how visitors may behave for those of traditional decision makers if we are not careful. When we speak for the visitors we must base our conclusions on empirical data that has been shown to have generality. More importantly, the advocacy role requires that we insist that visitors be allowed to speak for themselves. We need to push for greater visitor input during the planning and development of all exhibits and programs. We need to persuade administrators that visitor input in the form of evaluation is of primary importance! We have failed to systematically target directors and other administrators with persuasive messages about the advantages of visitor input. *Until visitor evaluation is*

*included as a significant part of the regular budget of exhibition organizations, we have not succeeded in our advocacy mission.*

Visitor advocacy also implies that we protect visitors against exploitation. I confess that I don't quite know how to define exploitation, but it's one of those animals that you know when you see one. Excessive entrance fees and \$5.00 hot dogs seem to qualify.

Finally, it is important to note that, in the long run serving the visitor also serves the organization. Word of mouth is the most effective advertising. If visitors are satisfied with their experience, they are likely to pass on their pleasure to others who are more likely to visit. Furthermore, as you know, satisfied visitors are more likely to return.

**Multidisciplinary view: global approach.** The diversity of disciplines represented at this 1989 Visitor Studies Conference demonstrates that visitor studies is a multidisciplinary movement. We have specialists from public relations, marketing, education, recreation, exhibit design, visitor services, and evaluation. I believe that this mix of viewpoints and expertise is important. If we view our professional roles as independent from one another, the visitor will suffer. On the other hand, if we pool our different viewpoints, each of us providing our unique perspective and knowledge, we have a better chance of creating the ultimate visitor experience.

**Formal evaluation: a technique for answering questions.** Evaluation involves the specification of criteria for judging the effectiveness of something. The visitor studies perspective is evaluative in that there is continuous questioning of how the exhibitions or programs will impact on visitors and there are continuous formal and systematic efforts to find answers to these questions. We are concerned with applying formal evaluation techniques to obtain information which promote the development of better exhibits and programs. In addition, there is emphasis on formal rather than informal evaluation.

**Scientific: developing methods and theories.** The visitor studies approach uses a scientific model of collecting information about visitors, and a scientific model of theory building. One could debate whether visitor studies has a unique methodology since it has been, to a large extent, borrowed from the social sciences, education, and marketing. We use direct observation, surveys, and instructional assessment instruments. Despite the fact that these techniques are common to other disciplines, they are combined in a unique way to study visitors. As most of us have learned when we first started to study visitors, application of these methods to visitor settings requires experience and knowledge unique to the situation. For example,

developing recording protocols is not a simple matter. How do you decide the rules for measuring the length of time a visitor attends to an exhibit? Or, how do you record the behavior of a family group when they split up and attend to different exhibits?

Although theory building in visitor studies is in its infancy, many of us have argued for better theories of visitor behavior. We have borrowed from cognitive psychology, learning theory, perception, and a host of other disciplines. But we need to formulate empirically-based principles of visitor behavior and informal learning. We also need models that allow us to predict how visitors will react in a given situation.

## 2. Scientific merits of data collection methodology

Although there may be controversy over how best to collect information in a scientific manner, most of us agree that our data collection should be *objective, reliable, valid, and replicable*. These criteria are basic to any scientific measurement and will be discussed individually below.

**Objectivity**, or not allowing personal feelings to influence recording, can be increased if the behaviors to be recorded are precisely defined and the methods of recording standardized so that the same criteria for recording is used at all times. For example, in recording whether or not a visitor attends to an exhibit label, it is important that each data recorder use the same "rules" for counting a response. The rule might require the visitor to be stopped for two seconds or more in front of the label and visually fixated on the label's content. This recording procedure is less likely to produce subjective judgements about whether the visitor attended to the label than if no such specification were made.

**Reliability**, or the consistency of measurements, can be measured in several ways. If we are concerned with the ongoing behavior of visitors, we want to know if two or more independent observers agree on what they are measuring. Conducting interobserver reliability checks is important to determine if the recording system is well defined. I believe visitor studies have not given enough attention to this problem. Some observational systems produce poor reliability because the rules for recording are not sufficiently objective.

For example, in one of our zoo studies we attempted to look at the interaction between visitor and animal behavior. To do this we attempted to record four levels of animal activity using a coding system modeled after Joyce Shettel-Neuber's (1985) report. The following codes were used:

- Animals not present or visible.
- Animals present and asleep.

- Animals present and moderately active (e.g., sitting, walking).
- Animals very active or engaged in interesting activity (e.g., eating, climbing, swinging, "clowning", dragging browse, playing with a ball).

When we had independent observers record the same animal during intervals in which a target visitor was viewing the exhibit, we found poor agreement between the third and fourth codes. "Moderate activity" and "Very active" or "engaged in interesting behavior" were interpreted very subjectively by our recorders. In addition, there were some species (e.g., reptiles) that showed little variety in their activity when and if they did actually move! For example, activity level in snakes tends to be quite uninteresting compared with the human-like antics of great apes.

Another aspect of reliability asks if the measurement system is used in the same way across times and places. If a data recorder was biased, he/she might give the benefit of the doubt in recording label reading for one exhibit, but not for another exhibit. In addition, subtle drifts in recording criteria are not unusual and must be carefully monitored.

Observational studies should address these reliability problems. Using occasional reliability checks is, perhaps, the best way to ensure that measurements are reliable. In a reliability check two independent observers record the same events and the results are compared for interobserver agreement.

**Validity**, or the accuracy of our conclusions, is a more complicated issue because it has many implications. We must be wary, for example, of using statistics like a drunk uses a lamp post—more for support than for illumination. We must avoid generalizing beyond our data or not considering alternative explanations of results.

One aspect of validity is "construct validity" or the degree to which the recorded data really measures what they are supposed to measure. For example, if we record the duration of time a visitor stands in front of an exhibit looking at the exhibit, can we conclude that this is a measure of visitor attention to the exhibit? Perhaps the visitor is daydreaming or thinking about where to go to lunch. If we ask visitors what they did at an exhibit, can we be sure that their statements are really accurate? There is often a lack of correspondence between what visitors say and what they do!

Another aspect of validity is "content validity" or the degree to which the observations are representative from all the cases they are assumed to represent. For example, viewing times at outside exhibits on rainy days is obviously shorter than viewing times on pleasant, sunny days. In addition, viewing under crowded conditions tends to be shorter than viewing under uncrowded conditions. Samples of behavior must

take into account these types of factors if conclusions regarding the data are to be accurate.

**Replication** is a criterion that requires the repeatability of results. This criterion requires at least two important things: (1) a description of procedures in enough detail so that the project can be replicated by others; and (2) serious consideration of how much data needs to be gathered in order to make an inductive conclusion about the results. If a research or evaluation report does not provide sufficient detail, it is unlikely that others will be able to duplicate the results.

There is a second factor with respect to replication. How many visitors must behave in a similar way before you are ready to make an empirical generalization? If you are determining the readability of an exhibit label, do you need to observe 10 visitors? 30 visitors? 100 visitors? 500 visitors? How often do you have to replicate your results to be convinced that 50 percent of visitors actually read the labels? The answer to this question is not a simple one. On the one hand we could argue that statistical estimates should be used to determine sample size since increased sample size produces increased power (i.e., the probability of rejecting the null hypothesis when it is false). However, using a statistical approach is not always cost-effective. For example, let us say that you find a statistically significant difference in visitor reading when comparing two placements of an exhibit label. If you had to increase the sample size per group to 1000 visitors in each group in order to produce a difference, it would seem that the difference in label positions is not worth worrying about.

To ensure that scientific standards are met, we might benefit from a guide such as is provided by *The Standards for Educational and Psychological Tests* (1974).

### 3. Interpretation of results

The results of data collection can almost always be interpreted in more than one way. The various interpretations should be discussed with decision makers in order to minimize the chance of the results being inappropriately used. For example, the fact that a very small percentage of minorities visit a museum could be interpreted as a lack of interest on the part of minorities in what the museum has to offer and thus the museum administration could justify not marketing to minorities. However, it is also possible that minorities are not aware of the enjoyable experiences offered by the museum. Once people experience the museum they are more likely to return. Or it could be argued that the museum is not providing meaningful experiences to this segment of the public and the museum should change its methods of communication or the message itself.

In one study of animal abuse at zoos, it was found that a particular ethnic group was more likely to abuse animals. Should this data be used



to discourage visitation by members of this group? Or, should we find more effective ways to control such abuse?

#### **4. Professional competence**

This issue is difficult to define for several reasons. First, competence requires different knowledge and skills for different types of jobs. Obviously, a competent exhibit designer would need a different set of skills than a competent educator. A second reason why it is difficult to define competence is that we may not be able to identify all of the necessary skills and knowledge for competent performance of a particular job. There are intangibles that often make a person who looks wonderful on paper, an ineffective worker. Getting along with other people is one of these intangibles. A third reason for the difficulty in defining competence: the same job title may require different skills in different institutions. In addition, there may be little agreement on which skills are most important for a particular job. Finally, there may be disagreement on how to measure skills, even if we agree on what skills may be important.

For the moment we might attempt to identify some of the more obvious and easy-to-measure types of knowledge and skills necessary for visitor-related jobs. A visitor evaluator should: be knowledgeable and skilled in the use of the scientific methods of collection data from human participants; be aware of the visitor studies literature; be aware of ethical considerations; be skilled at interviewing; be able to communicate both in writing and verbally, etc. An educator should: be able to formulate instructional objectives; be able to communicate to learners, etc. A public relations specialist should: be able to design and implement publicity programs; evaluate their effects, etc. Adams (1983) provides a useful job analysis for those working in public relations. This model might be useful for other visitor disciplines to develop their own job analyses.

Although only a beginning, the following steps may help to increase competence in visitor-related disciplines:

- Develop and publish guidelines for accurately representing competence, training, and education.
- Develop and publish guidelines for high standards of practice.

#### **5. Professional training**

Professional training issues are numerous. Where should training be conducted? Who should conduct the training? What kind of training is necessary or desirable? At the current time there is no special academic training program for visitor studies. I expect that eventually special degrees in visitor studies will be offered at universities. At the moment, we don't have that option. We can, however, offer a variety of training

experiences in the form of workshops, short courses, in-service training, and continuing education options.

## 6. Regulation of professionals

The first question to be addressed here is, "Why should we be concerned about regulating professionals?" I can think of five possible arguments:

- Protect visitors from unethical practices.
- Protect the profession from bad public relations.
- Protect the museum/zoo client from selecting an incompetent or unethical practitioner (i.e., making sure that the consumers get their money's worth).
- Ensure high standards of practice.
- Establish guidelines for practice.

The next question, "Who or what should be regulated?" There are three possibilities: individual professionals, programs that educate and train professionals, and the procedures used by professionals.

A third question might ask, "What form should regulation take?" It could be in the form of published guidelines describing competent and ethical practices. The published guidelines would serve as a model for practitioners. Or, regulation could involve some type of certification procedures. Having been immersed in the licensing of psychologists, I can tell you that certification and licensing procedures are plagued with problems.

Another question relating to regulation: "How do we maintain quality control of practices?" Most professions use a combination of the following:

- Monitoring the ongoing practices of professionals (e.g., institutional review committees).
- Built-in accountability systems.
- Continuing education.
- Informing potential clients of guidelines, qualifications, and standards of practice.
- Certification.

## 7. Use of professional terminology

The use of consistent terminology in visitor studies is important in order to minimize confusion when we attempt to communicate with one another or with other professionals. In Volume 3, Issue No. 4, of *Visitor Behavior*, we published a glossary of terms for visitor studies. I'm sure that many of you have suggested modifications, corrections, and additions to this glossary. I encourage you to submit these to *Visitor Behavior*. Tara Knott and Chan Screven recently told me that they are working on a paper dealing with such terminology and I applaud such

efforts. Ultimately, public dialog must occur. Because of the diversity of views, it would be surprising if we all agreed even after considerable discussion.

There are several ways we could proceed. For example, we could encourage written responses to a published glossary. Then, have an independent group review the responses and rewrite the glossary. The glossary could then be re-published and additional responses solicited, reviewed, etc.

## **8. The use of intrusive measurement procedures**

Generally, when we study visitors, we use data collection procedures that do not significantly interfere with the visitor's normal activities. For example, when we observe whether or not a visitor stops, how long he/she stops, the size of the visitor group, etc., we are not significantly intruding in the life of the individual. Even when we conduct a brief survey, only a few minutes of the visitor's time is involved. The issue of intrusive measurement arises when we use lengthy interviews, or focus groups, or some type of cued-visitor technique where much greater investment of time and effort is requested from the participant. Phone surveys that are timed during the dinner hour can also be intrusive as most of you know from experience. Even a brief survey is intrusive if you are in the middle of dinner preparation when your number is dialed. How much should we intrude on the visitor's time and behavior? When are we justified in making such an intrusion? What types of interventions do visitors perceive as intrusive? These are ethical questions that are not always considered when professionals select recording procedures. While we may disagree on how intrusive these methods are, there is no doubt that there is potential for abuse if we are not careful.

Establishing guidelines may minimize the chance of abuse. The following are suggested as a starting point:

- Data collection procedures should involve the least intrusive methods whenever possible. Only when vital information cannot be collected in other ways should more intrusive methods be selected, and then, the participant should be told in advance how long the procedure will take and some type of compensation should be offered for substantial investments of time and effort.
- Those conducting surveys or enlisting volunteers in the evaluation should be instructed never to press visitors to participate. Visitor participation must always be voluntary.
- Determine during preliminary planning how intrusive your procedures are by testing them out on a small sample of people.

## **9. Recording visitor behavior unobtrusively**

Observing visitor behavior without the knowledge of the person being observed raises some touchy questions. First, is such a procedure an invasion of the visitor's privacy? And second, do visitors get upset if they think they are being observed? With respect to the first question, it is my belief that behavior in public places is open to public inspection and exhibition visiting is public behavior. (Individual identities should never be used in the reporting of data.) Thus, unobtrusive recording of public behavior is not an invasion of an individual's privacy, at least as it is usually practiced. However, ethically, I feel better about informing visitors that the exhibits/programs are being studied and that they may be observed during their visit. Of course there are limits to the notion of "public behavior." Unobtrusive recording of visitor behavior in the rest room should be considered an invasion of privacy because most people judge behavior in the rest room to be private.

## **10. Collecting permanent records of behavior (e.g., videotapes)**

Many organizations are apprehensive about using video and/or audio tapes to record the behavior of visitors. Again, the issue of privacy is often cited as the rationale for not allowing such recordings. In addition, part of the reluctance may be that negative publicity would be directed toward the facility if it became known that videotaping of visitors was commonly undertaken. One could argue that the presence of videotaping devices makes visitors uncomfortable and thus impacts negatively on their visit. However, there has been no reported evidence that videotaping has a negative impact on visitors. Data on this subject would be useful.

Four steps may be taken to help minimize the problems with videotaping:

- Give public notice of taping.
- Destroy tapes after a reasonable amount of time.
- Have taping procedures reviewed by a committee to ensure that visitors' rights are protected.
- Take pains to hide the identities of those being observed.

## **11. Educating the public to be better visitors**

Most of us assume that exhibits and programs would improve if visitors demanded more from museums, zoos, and parks. Unfortunately, visitors tend to blame themselves when they don't understand the message or when they don't enjoy the exhibit or program. Can we educate the public so that they learn to discriminate better and give feedback to institutions? Why don't we tell visitors how they could get more out of their visit? What if we conducted tours that attempted to tell visitors how to look at exhibits, what kinds of questions to ask themselves, etc.?

## 12. Structure of professional organizations

How should visitor studies be organized? Are the current associations and special interest groups adequate to satisfy all of our needs? Will the AAM Visitor Evaluation and Research Committee take on a central role in organizing the profession? It seems to me that a profession needs a sizable mass of members if it is going to be identified as a profession. How can we involve more professionals who are concerned with visitor-related activities?

## Final Thoughts

I have tried to point out some of the professional issues that seem to be important for our emerging field of visitor studies. Although a few suggestions have been made on how to deal with these issues, it would be presumptuous to attempt to provide definitive answers to these thorny problems. The above discussion is offered as a challenge to others working with visitors to deal with the issues that will affect our future as visitor studies specialists. In recognition of the importance of these issues, the AAM Visitor Evaluation and Research Committee has appointed an ad hoc committee to study professional standards. It is my hope that professionalism in visitor studies can be achieved without the excessive territoriality and arrogance that has occurred in some other professions.

## References

- Adams, G. D. (1983). Museum public relations. Nashville: American Association for State and Local History.
- Bitgood, S. (1988). Introduction: Visitor studies – 1988. In S. Bitgood, J. Roper, Jr., & A. Benefield (Eds.), Visitor studies – 1988: Theory, research, and practice. Jacksonville, AL: Center for Social Design, pp. 5-10.
- Bitgood, S. (1988). Visitor studies: Coming of age. Visitor Behavior, 3(3), 3.
- Ethical Standards of Psychologists (1979). Washington, DC: American Psychological Association.
- Loomis, R. J. (1988). The countenance of visitor studies in the 1980's. In S. Bitgood, J. Roper, Jr., & A. Benefield (Eds.), Visitor studies – 1988: Theory, Research, and Practice. Jacksonville, AL: Center for Social Design, pp. 12-24.

- 
- Standards for Educational and Psychological Tests (1974). Washington, DC: American Psychological Association.
- Shettel, H. (1988). Do we really, really need visitor evaluation? In Bitgood, Roper, & Benefield (Eds.), Visitor studies – 1988: Theory, research, and practice. Jacksonville, AL: Center for Social Design, pp. 25-31.
- Shettel-Neuber, J. (1985). The Whittier Southeast Asian exhibits: A post-occupancy evaluation and comparison with older exhibits. Technical Report No. 86-80. Jacksonville, AL: Center for Social Design.
- Statement of Goals – AAM Visitor Evaluation and Research Committee. (1988).