

REPORT OF FINDINGS & RECOMMENDATIONS
FOR THE FIELD MUSEUM



What Makes a Great Museum Experience and How Can Technology Help?
Visitor Research and Segmentation for The Field Museum's Grainger Initiatives

The **Field**
Museum

November 7, 2014

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Dear museum colleagues,

In 2012 The Field Museum received a generous gift from The Grainger Foundation for a set of digital initiatives that would cover everything from CT scanners for scientific research to improvements to the building's Wi-Fi system. To determine how we should use the funds earmarked for exhibits, we decided to do a visitor study. It was a unique opportunity. As museums around the country have increased their use of digital technologies, we've seen more and more studies on the subject. But the majority of these have been focused on a particular project, type of technology, or kind of visitor.

We now had a chance to do something bigger. **To know what visitors wanted to do with digital technologies in a natural history museum, we first needed to know what they wanted to do, in general.** We needed to understand their fundamental motivations for coming to our museum. Depending on who we spoke with, such a study was either superfluous (because we already knew the answers) or undoable (because we would never know the answers). The people at Slover Linett, however, had good ideas on how such a study could be useful and doable.

Within its many findings, one common thread runs through the report. Visitors see the museum as a facility that they are paying for, in order to have certain kinds of experiences. And while they view the museum as an authority, and respect our scientific expertise, they don't care about what the museum wants to give them through these experiences. They care about what they want to get out of them.

The good news is that the two sets of goals map onto each other so closely. Putting the visitor at the very center of our efforts does not compromise the museum's mission; it is our mission. The more closely we listen to our visitors and respect their wishes, the better we will be at creating engaging, rewarding, and meaningful experiences—broadening our audience and increasing our success.

My Field Museum colleagues and I welcome any comments, questions, or ideas. I can be reached at mmatcuk@fieldmuseum.org.

Sincerely,



Matt Matcuk
Exhibition Development Director
The Field Museum

The **Field**
Museum

Acknowledgements

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We're also grateful to anthropologist **Shayna Silverstein**, now a faculty member at Northwestern University, who collaborated with us on the qualitative data collection, and our Slover Linett colleagues **Peter Linett**, Chairman & Chief Idea Officer, and **Jennifer Benoit-Bryan**, Research Analyst, for their contributions to this report.

We welcome questions and comments on this report and ideas for advancing the lines of inquiry explored here. Please email the authors at hello@SLaudienceResearch.com.



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executive summary

Introduction & objectives

In 2012, The Field Museum received a major grant from The Grainger Foundation to help the institution take a “leap forward” in digital engagement. The grant was organized around five initiatives: technology infrastructure, digital imaging of collection objects, planning for the Museum’s new Digital Learning Lab, digital technologies for exhibits, and the development of new offerings for the museum’s far-flung online and mobile audiences. Despite that breadth, The Field Museum leadership team wanted to ensure that all of these technological investments would be closely and organically tied to the museum’s core “product”—the experience of visiting its exhibitions in Chicago. The museum set out to develop a set of general, evolving, and visitor-centric principles to guide the deployment of new technology in the museum experience. Eager to avoid the cart-before-the-horse thinking that sometimes accompanies technological innovation in the museum field—the rush to “stay relevant” by incorporating digital tools and experiences before it’s clear what needs they’re meant to fill or what strategic vision they’re designed to support—the exhibitions team proposed to begin with a broad, exploratory visitor study to understand, first, what visitors are hoping to experience when they come to The Field Museum and, second, how technology might support those ideal experiences.

When the museum approached Slover Linett with this sequence of research questions in mind, we were enthusiastic. The informal learning field spends a fair amount of time articulating its own ideals and goals for the museum experience¹; less attention is paid, typically, to the ideals of the visitors themselves. So this was an opportunity to step back and learn something new—or perhaps confirm what is already known—about visitors’ motivations and desired experiences in the natural history context and to think afresh about how digital technology can help bring those experiences to life. That latter question, we soon realized, would yield both direct and indirect answers in this research: direct, because we would ask visitors about their technology preferences; and indirect, because identifying visitors’ ideal museum experiences would give The Field Museum staff a new

¹ Chief among those ideals and goals, of course, is learning. An excellent appraisal of the state of the field from that perspective is *Learning Science in Informal Environments*, National Research Council (2009).

basis for brainstorming additional ways that technology could be used to help foster those desired experiences, even where the visitors themselves may not have imagined a digital component.

Context

In the last decade or so, the literature on the role of digital engagement and other technology-based approaches in museum work has become increasingly forward-looking and provocative, addressing theoretical and practical questions raised by touchscreens, mobile content, social media, digitization and open-source sharing, augmented reality, gaming and gamification, “the internet of things,” and other developments. Although much of that literature still consists of evaluation reports focused on particular digital programs or tools used in specific exhibitions, the last few years have brought a number of bigger-picture studies, overviews and thought-pieces. Wyman et al. (2011) outline the changes that have occurred in public expectations, museums’ storytelling strategies, the physical and virtual spaces in which museum experiences take place, and in technology itself, observing that digital interactivity can and should be used to cultivate a more multi-vocal, less top-down vision of museum authority. Alexander (2014) sounds a related note, emphasizing the ability of digital tools to support visitors’ creativity and sense of play, “transform[ing] visitors into participants rather than passive observers.”

There have also been a number of recent studies in the wider museum literature that have identified distinct visitor types or segments within the visiting population. In perhaps the most recent of these, Pekarik et al. (2014) propose that visitors fall into one of four “experience preference” categories, prioritizing either *ideas, people, objects, or physical* engagement—a taxonomy with rich implications for digital design and strategy, though the authors didn’t pursue them in detail. Earlier, Falk (2009) argued that museum visitors’ motivations for attending (and by extension, the kinds of experiences they seek at the museum) depend on their identities as visitors, which fall into five segments: *explorers, facilitators, experience seekers, professionals/hobbyists, and rechargers*.

But no recent study that we’re aware of has attempted **to systematically examine visitor experience preferences with respect to technology in museums and to segment visitors based on those preferences**. So, in a sense, The Field Museum’s Grainger research is an attempt to bridge the technology-related museum literature to the experience-preference literature. We acknowledge that our segmentation, outlined below and detailed in the original Phase 2 report, characterizes The Field Museum’s visitor population and may not be extrapolable to the audiences of other natural history museums or other types of informal learning institutions. But with that important caveat, we hope it will be useful as one possible framework for thinking about the range of visitors’ technology preferences in museums, and as such a contribution to both corners of the discourse. We also hope it will be tested and refined in future studies in other museum settings.

About this report

The present document is a new executive summary written to introduce and summarize the findings of the Grainger research for the museum, informal learning, and visitor studies communities in November, 2014. This executive summary can be read as a standalone document by those wanting only a brief review of the study, or as an introduction accompanying the original two reports delivered by Slover Linett to The Field Museum in May, 2013 (the exploratory qualitative findings) and December, 2013 (the quantitative visitor survey findings and segmentation). Both of those original reports were working documents in presentation format, which facilitated group discussion with staff from multiple departments and multiple levels at the museum.

For those reading this as a standalone document, the original reports can be found here:

www.SLaudienceresearch.com/publications.

Methodology

Slover Linett used a two-phased, multi-mode approach to understand Field Museum visitors' motivations, desired experiences, meaning-making strategies, and preferences regarding technology in the museum experience. The first phase was an exploratory qualitative/ethnographic study to elicit and examine visitors' motivations, desired experiences and meaning-making priorities, and technology preferences and attitudes—including ones that may be hard to articulate or rarely made explicit. Specifically, the research team used un-cued observation and in-context interviewing of Field Museum visitors in nine sessions of between three and four hours each, between December, 2012 and March, 2013.

The second phase of research focused on confirming and quantifying the prevalence of the motivations, desires, priorities, and preferences uncovered in the exploratory research. We conducted a tablet-based survey of visitors on-site at The Field Museum during two data collection periods in August and October 2013. A total of 612 questionnaires were completed, and the overall response rate was 71%.

Finally, to identify segments within the survey population, we used cluster analysis to group respondents who share relevant attitudes and preferences. The clustering model was based on three sets of characteristics: visitors' motivations and values regarding museum visitation, ideals for their Field Museum visit, and attitudes toward technology at the museum.

Findings & recommendations

The research findings and recommendations are summarized briefly and incompletely here; for a more detailed discussion, please see the summaries of findings in the original reports: pages 10–23 of the Phase 1 qualitative report (May, 2013) and pages 10–27 of the Phase 2 quantitative report (December, 2013), both available at www.SLaudienceresearch.com/publications. For the purposes of the present document, we recap the findings in three broad areas: visitor motivations and ideal

experiences, the role of technology in supporting those ideal experiences, and our visitor segmentation based on those factors.

Visitor motivations and ideal experiences

Like other studies of museum visitors, our Field Museum research found that many visitors view the visit as a social experience: they come to the museum in part to create memories with and become closer to loved ones through the shared experience of the institution and its exhibitions. Museums appear well-suited to creating those meaningful experiences with family or friends because they offer unique environments—a departure from both everyday life and other leisure-time activities—and because the visit is co-directed by the group, allowing visitors to create the “story” of their experience together in a fun and memorable way.

What about the stories the museum creates—the content of the exhibitions? Our research suggests that, for many visitors, the exhibitions serve as a catalyst for the sharing of stories, opinions, and perspectives that help visiting companions get to know each other better and feel closer to one another. **People value the museum as an opportunity for learning, but not only about the museum’s content. They also enjoy learning about their friends and family members:** their personal values, past experiences, interests, and curiosities. The shared museum visit sheds new light on the personalities and identities of one’s companions.

Visitors also value the museum as a way to learn about themselves. Exploring a large institution like The Field Museum, with its multiple exhibitions and large collections, lets the visitor figure out what she’s drawn to and passionate about, thereby revealing something new about her own preferences and interests. The content can also provide an opportunity for introspection and reflection about her life and experiences. Such self-knowledge is sometimes constructed in interactions with the others in her visiting group, and those introspections and reflections can be rewardingly shared.

Given those motivations and ideals, it’s not surprising that Field Museum visitors want the museum to be a potent, memorable catalyst for those shared and/or introspective experiences. They hope for awe-inspiring encounters with nature and human cultures that transform or expand their sense of the world and their place within it. And they value sensory and immersive experiences that they can’t find elsewhere—especially when those experiences evoke visceral and emotional reactions like wonder, amazement, surprise, disgust, or imaginative fear. Multisensory and immersive experiences can help visitors feel transported to another time and place, bringing the subject matter to life and making the experience “stick with” them (and their companions) long after the visit.

Yet those powerful exhibition experiences need to leave room for the visitors to tell their own stories to each other and themselves, and to form their own opinions and perspectives. Visitors want to play an active role in the museum experience, and they need freedom and opportunities to do that along the way, not only at the end of an exhibition. While they acknowledge the significant gap in knowledge and authority between themselves and the museum, they want the museum to

wear its authority lightly, using an approachable, down-to-earth, charismatic voice that lets visitors feel like they're part of the conversation. Faced with interpretation that feels heavy-handed or closed-ended, visitors may disengage.

We found that the kind of *content* learning visitors value most in their museum experiences isn't about gleaning new facts (although that can be enjoyable when the facts are striking enough to prompt conversation, emotion, etc.); it's about being exposed to new ways of thinking and provoked to ask questions they didn't know they had. They relish museum experiences that give them fresh perspectives on the world around them, for example, by challenging their preconceptions or helping them see something familiar in a new way. Our qualitative study suggests that visitors come to the museum with a mental model of knowledge as infinite rather than finite: there's no way that they could know everything about the topic anyway, so **the learning they seek from the museum is less about filling in the gaps in their current understanding and more about having their sense of the world reshaped and expanded.**

The role of technology in supporting those ideals

How can technology help Field Museum visitors have the kinds of experiences they're hoping for? Our research suggests two broad answers: by giving them ways to get closer to the museum's content (nature and human cultures), and by giving them a platform for shared experiences and meaning-making with their visiting companions. The two strategies are related, of course; it's easy to imagine digital tools designed to achieve both goals. The challenge, revealed in our qualitative interviews with visitors, is to ensure that the technology doesn't create a divide between the visitors and the content or between them and others in their group. They seek authentic, unique connections on both dimensions, and while they're excited about the role that technology can play in deepening those connections, they also caution that too much or the wrong kinds of technology could be distancing or distracting.

The quantitative research confirmed that visitors are generally excited at the prospect of new digital tools in their Field Museum experience: nearly three-quarters feel that new technologies have the potential to enhance the visiting experience, and two-thirds said they would "love" to see the museum incorporate more such technologies into its exhibitions. For the most part, they're agnostic about which kinds of digital tools or platforms would be employed, though not surprisingly they expressed particular interest in the kinds of technologies that many museums already provide, such as digital touchscreens featuring multimedia content, and apps that can be used on their own or museum-provided handheld devices. Interestingly, the levels of interest in technology were largely independent of demographic factors such as age, education, and income. This may surprise observers who assume that younger visitors are more interested in technology than older ones; we found that there are about as many older visitors excited about, for example, digital touchscreens as younger ones, and about as many young people who see the museum as an escape from digital technologies as older visitors. What we're exploring in this study overall and in the segmentation in particular is a set of psychographic, rather than demographic, characteristics.

The survey findings also help quantify that concern about the potential distractions of technology. For many visitors, a visit to The Field Museum is a chance to recharge and reconnect with the natural world and with loved ones without interference from the trappings of contemporary life. (Nearly half of visitors describe their ideal visit as an escape from modern life.) Many visitors place a premium on encountering real, authentic objects at the museum and don't want new technologies to replace "the real thing" at the museum (see segmentation section, below). But most recognize that technology can play a positive role in helping them have real *experiences*—powerful, meaningful, and sharable—of and around those objects.

It's worth noting that many visitors are already using their own technologies in the museum to capture memories of their experience, often in highly social and sometimes humorous ways. (About three-quarters report using cameras, smartphones, or tablets to take photos during their museum visits.) A minority are also using their devices to augment or enhance the exhibition experience for themselves or their visiting party, for instance by looking up a question or topic of interest during their visit (23%) or looking up this information once they arrive at home (38%). New technologies developed by the museum can capitalize on these impulses and provide fresh, perhaps surprising ways for visitors to achieve their goals.

Audience segmentation

Using cluster analysis on a subset of variables in the survey data, we identified five segments within The Field Museum's visitor base. The segmentation process involved statistically grouping respondents whose motives for visiting, ideals for the museum experience, and attitudes toward the use of technology in the museum were similar. The resulting segments are: Curious Activity-Seekers, Contemplative Traditionalists, Social Explorers, Parent-Facilitators, and the Disengaged.²

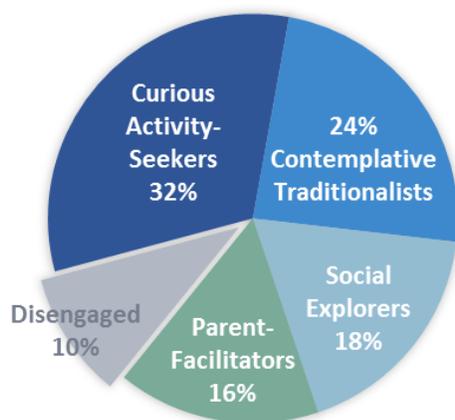


Figure 1: Visitor Segments as a Proportion of the Overall Field Museum Visitor Base

² Readers familiar with the other recent visitor segmentations mentioned on page 2 will note parallels between, say, our Curious Activity Seekers and Falk's Experience Seekers, or between our Social Explorers and Pekarik's "People"-oriented visitors. We suspect that such similarities reveal even more fundamental underlying needs and preferences, which make themselves evident despite the very different purposes, framings, and survey instruments used in these studies.

As the chart on the previous page (Figure 1) shows, the largest audience segment was a group we called **Curious Activity-Seekers**, representing 32% of visitors. Mostly comprised of out-of-town tourists, Curious Activity-Seekers measure the value of their museum visits primarily in terms of the new perspectives or knowledge they gain. They're particularly interested in hands-on, interactive, and participatory museum experiences that are facilitated by the museum. This is the most pro-technology segment: Curious Activity-Seekers view new technologies like digital touchscreens and apps as natural ways of providing the active, hands-on engagement they seek.

The second-largest segment, which we named **Contemplative Traditionalists**, makes up 24% of the sample. Visitors in this group seek a deep connection with the natural world and the ideas and inquiries associated with it, and many come to the museum regularly to explore specific topics of interest. While engaging with museum content is their top priority, they—like visitors in other segments—also value the opportunity to do so with the family members and friends with whom they visit. Contemplative Traditionalists strongly prefer self-directing their experiences through the exhibition space; they're less enthused about interactive, hands-on, or museum-directed social experiences. They tend to see technology as an actual or potential disruption of their preferred museum experience, which they prize as an escape from modern life.

The next segment, representing 18% of visitors, we called **Social Explorers**. These individuals see their museum experiences primarily as opportunities to recharge and to reconnect with loved ones. They prefer free-form, open-ended exploration to more directed, closed-ended experiences. They are generally in favor of new technologies at the Field, particularly interactive experiences that would help them to connect with friends and family.

The segment we named **Parent Facilitators** makes up 16% of the sample and consists primarily of parents who were visiting with their children. They want to provide their children experiences that are both enriching and fun, and they're very much in favor of hands-on and interactive experiences that they and their children can enjoy. They see technology as a natural way of providing those kinds of experiences, though by no means the only way.

Comprising our smallest segment at 10% of the sample, **Disengaged** visitors bring a fairly conventional and dutiful understanding of what a museum visit should be, emphasizing the importance of seeing real, authentic artifacts over all else but showing only tepid enthusiasm about doing so. They are largely uninterested in hands-on or participatory museum experiences and generally indifferent to the use of technology in the museum. Because the Disengaged represent a small segment of Field Museum visitors and their passive approach to visitation is likely



Figure 2: Relative technology affinity of the key visitor segments

to make them indifferent to new Field Museum offerings, technological or otherwise, we've recommended not focusing on them in the Grainger initiatives planning process.

As Figure 2 on the previous page illustrates, the four key segments embrace technology in the museum experience to different degrees, but three of them—representing 66% of all visitors—believe that new digital technologies would enhance their Field Museum experience. The challenge facing the museum, clearly, is to reconcile the desires of visitors who embrace technology (Curious Activity-Seekers, Social Explorers, and Parent-Facilitators) with the desires of visitors who hope to avoid it (Contemplative Traditionalists). It would be complex enough to develop new technologies that meet the varied ideals and engagement preferences of those three segments, supporting but not getting in the way of the authentic, social experiences they seek. But to do all that without detracting from the experiences sought by the museum's second-largest segment will be tricky.

That said, not all technologies are operated by, or even visible to, visitors themselves; it may be worth thinking of creative ways to integrate subtle, ambient, or otherwise unobtrusive technologies in the museum experience specifically *for* Contemplative Traditionalists—as long as those technologies add to the authentic, meaning-laden connection to the natural world that they seek. Even the museum's least technology-seeking visitors share to some extent the hope of having unique sensory, immersive, and imaginative experiences that transport them to another time and place and make the topic emotionally as well as cognitively real—goals to which technology can contribute in powerful ways.

Recommendations

To balance the different segments' divergent visions of the museum experience, we recommended that The Field Museum develop a "layering" approach in which it can strategically mix a variety of digital and technological experiences with more conventional forms of interpretation in any given exhibition, with the proportion depending on the goals and intended audiences of the exhibition and perhaps the intended sequence and distribution of experiences in the museum as a whole. While every exhibition planning team should at least consider the needs of all four of the key segments, that doesn't mean every exhibition must attempt to engage each segment equally; the exhibition team can dial up or down the aspects of the experience that are likely to serve different audiences. The idea is to be intentional and strategic about those decisions in light of what is now known about the audience. The table on the next page (Figure 3) may be a useful reference in that process.

More broadly, we recommended that the Grainger-funded technology development process focus on the ideal of creating sensory-rich, immersive museum environments that foster memorable, meaningful, and sharable encounters with the natural world and human cultures. We also noted the potential of technology to give visitors unique access to experiences they couldn't easily have otherwise or elsewhere (and certainly not at home on their computers or tablets). For example, the new technologies at The Field Museum could offer access to the *process* of scientific exploration and a "behind the scenes" look at (or better yet, involvement in) the work of the museum, both of

which visitors want. In addition, we recommended working to develop technologies that work in concert with real, rare, or valuable objects, letting visitors encounter and interact with them in ways that would be impossible in physical terms.

	Curious Activity-Seekers	Contemplative Traditionalists	Social Explorers	Parent-Facilitators
What do they want to get out of their Field Museum experience?	Intellectual growth, gaining new knowledge and perspectives, experiencing a top Chicago attraction (most are tourists)	Engaging with particular topics of interest (esp. nature), gaining new knowledge and perspectives	Connecting with loved ones; relaxing and recharging	Providing enriching and educational experiences for their children
How do they prefer to engage with museum content?	Interactive, hands-on, participatory experiences they can enjoy individually	Reading and looking at artifacts, talking with their companions	Talking with their companions, open-ended exploration of ideas and exhibition content	Interactive, hands-on, participatory experiences they can enjoy with their children
How can technology support their desired experience?	Mobile apps tours to help them see the “best of” the Field, digital interactives that focus on challenging their assumptions and giving them new perspectives	By <u>not</u> interfering with their experience; consider using mainly hand-held or atmospheric technologies in exhibitions where they can commune with nature and human cultures	Interactives displays featuring open-ended exploration of content, games, etc. that serve as a platform for shared meaning- and memory-making	Digital displays featuring games, mini-“science experiments” and other interactive activities alongside more traditional hands-on activities

Figure 3: Museum visitor typology with motivations, engagement, and technology preferences

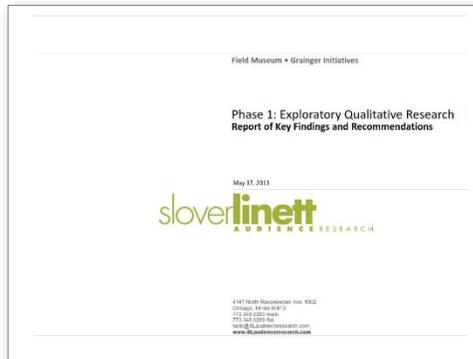
This research also points the museum toward opportunities to extend visitors’ experiences beyond the four walls of the museum through online or mobile app-based tools that encourage exploration of collections objects or exhibition themes. Currently, about one in five visitors go to the Field website before or after their visit to explore the natural history content there—a proportion roughly similar to that of other museums Slover Linett has worked with. The museum’s new technology initiatives present a significant opportunity to enhance the online experience and extend the on-site experience by digitizing its collection and offering compelling “on-demand” experiences for both physical and virtual audiences.

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For more information...

Readers viewing this executive summary as a standalone document are invited to continue by reviewing the two original reports submitted by Slover Linett to The Field Museum after Phases 1 and 2 of the Grainger initiatives research:



Phase 1: Exploratory Qualitative Research

May, 2013



Phase 2: Visitor Survey & Segmentation

December, 2013

The researchers at Slover Linett and the Grainger initiatives team at The Field Museum welcome your comments and questions. Please email us collectively at hello@SLaudience.com.



About The Field Museum

Chicago's Field Museum is one of the world's greatest natural history museums, both in top scientific research and educating its visitors of all ages. It's a treasury of objects including ancient mummies, dazzling gemstones, beautiful dioramas, and SUE, the largest and most complete *T. rex* ever found. Named for its founding donor, department store magnate Marshall Field I, the Museum first opened its doors in 1894. Today, it presides proudly over Chicago's lakefront Museum Campus, welcoming visitors from around the world.

www.fieldmuseum.org

About Slover Linett

Slover Linett is a social research firm for the culture and informal learning sectors. Since 1997, the firm has helped leading museums of art, science, and history; symphonies, dance companies, nonprofit theaters, and arts centers; and cultural agencies and funders take a fresh look audiences, engagement, and outcomes. Based in Chicago, the firm works with institutions including the Smithsonian, the American Museum of Natural History, Carnegie Hall, Getty Museum, Pacific Northwest Ballet, Philadelphia Museum of Art, Lyric Opera of Chicago, and the Irvine, MacArthur, and Rockefeller Foundations. Slover Linett's team of social scientists use rigorous research methods—quantitative, qualitative, and ethnographic—to help our clients understand the people and communities they serve, develop more innovative programs, and measure and track their impact. Slover Linett's vision is to explore the roles that cultural engagement and informal learning play in American life and inform the national dialogue about relevance and sustainability.

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