9.3 Developing personas and proto personas to enhance the art museum visitor experience

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✗ Abstract

This paper aims to study and think about the use of personas and proto personas on the art museum visitors' experience. Its object of study is the educational services of art museums focusing on children and young people up to the age of 18. This is a hybrid - conceptual and empirical – and exploratory study. Conducted through a qualitative methodology, constructivist paradigm and design approach. It relies on critical and creative thinking, as well on data collection. Using a total of 36 interviews to teachers/educators and legal tutors, divided into two distinct phases, and three pre-test interviews. It expands the investigation of application of the construction of personas and proto personas in the management of educational services in art museums. The value of this study lies in exploration of the construction of personas and in a learning context Do - Feel - Learn instead of the traditional "Learn - Feel - Do".

Keywords: personas, proto personas, art museum, visitor experience, visitor journey.

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1. Introduction and Methodology

This paper aims to study and explore the use of personas and proto personas on the art museum visitors' experience. Its object of study is the educational services of art museums focusing on children and young people up to the age of 18[4].

This paper is focused on the analysis of data collected through interviews with teachers/educators and legal tutors and their ideas and conceptions of the importance of the arts to their children.

These interviews were conducted on a pre Covid-19 scenario. Its main purpose is to understand the importance that teachers and legal tutors give to educational services based on their experience at the art museum site.

Using a total of 36 interviews to teachers or educators and legal tutors, divided into two distinct phases, and a total of three pre-test interviews. Based on this interview's analysis, proto personas were developed with the purpose of creating a participatory museum experience approach. For this one intends that the presented proto personas are as well representative for art museums educational services.

This is a hybrid - conceptual and empirical – and exploratory study. It was conducted through a qualitative

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methodology, constructivist paradigm and design approach, following literature review. It relies on critical and creative thinking, as well as on data collection.

Adding insights to the research on the application of personas methodology to the art museum scene, particularly to the educational services. Reflecting on how the use of personas and proto personas might be applied to enhance art museum visitors' experience.

2. Literature Review

2.1 Personas

Personas make the connection between the requirements and needs of the final users and the offered service/product. Personas should identify their behaviors, attitudes, needs and goals (Harley, 2015).

Its creation can be based on quantitative and / or qualitative methods. Data can be collected using several qualitative and quantitative methods, such as interviews, questionnaires, focus groups, diary studies, and real life observation (Cooper, 2007).

This method allows efficient adaptation of designing strategies (Siang, 2021) by creating empathy with the potential user / customer.

Even though personas are based on real data collected, they are archetypes / models that represent a wide group of potential users / customers and are not the description of real people (Siang, 2021; Cooper, 2007).

Defining personas commits the team to being linked to a common idea of who their users / clients are, increasing their focus.

According to Gothelf (2012) traditional personas require intensive research and methodology, meaning they are expensive and time consuming to produce, therefore smaller organizations might not be able to fully develop them.

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2.2 Proto personas

Gothelf (2012) suggests the creation of proto personas to avoid time and budget constraints: a cost-effective alternative to conduct this strategy.

Proto personas are created through brainstorming about the products / services where team members join their beliefs, assumptions and knowledge about the organization and its users / customers (Laubheimer, 2020) By using this technique, it is possible to start designing a strategic plan and decide which strategy to address (Gothelf, 2012).

It is important to validate their accuracy, meaning this is an iterative process: the proto personas should be redefined and redesigned through the process. This is a way to generate the focus of the organization back to the customer (Gothelf, 2012).

2.3 Museum Visitors

Despite living in the 21st century, Falk believes that most museums are still operating in the 20th century industrial business model with the one size fits all approach (Duplessis, 2011 in Falk, 2009).

Understanding who and why visits the museum is an increasing necessity. Several visitor studies have been conducted over time to better understand museum visitors. Mostly they focus on quantitative variables, such as demographic variables - age, race, gender, education, occupation, etc. or each day / hour the visitor goes to a museum (Falk, 2009). Falk declares that these are insufficient data to predict a person's will to visit a museum or not, as they have no relation to this decision process.

For this, the author suggests a new model of museum visitor experience, defining seven different categories for museum visitors: Explorers, Facilitators, Experience Seekers, Professionals / Hobbyists, Rechargers, Respectful Pilgrims and Affinity Seekers. Each one of these personas visits the museum with distinct objectives and motivations.

Thus, personas represent an important resource to the museum defining their ideal experience and approaches. Museum personas represent an iterative process as they are constantly evolving as time passes by, just like real people. By understanding its visitors, museums can better prepare their marketing and communication tools (Abrams, 2019).

However, one can understand the importance of gathering both demographic and qualitative data in order to develop more relevant and extensive results, as core demographics represent a relevant role in the customer's experience (Conrick, 2020), as they shape the visits outcome (Marques, 2018).

2.4 Visitor's journey and experience in the Museum

Customer experience is defined by the perception that the customer has from a determined brand / entity. This is an extremely fragile perception; therefore, it can change within every interaction (Morgan, 2017). Museum customers are referred to as their visitors and, for this it is relevant to perceive their interaction with the institution.

The visitor's experience is an ongoing study, proven to be an extensive and complex theme, being a recent subject for the museum lexicon (Marques, 2018). However, a parallel can be established with user experience studies related to computer human interaction.

The visitor's experience is an ongoing process, and the subject has proven to be as intricate and complex as the variety that exists among individuals.

Visitor journey represents a visualization of the process that a visitor goes through in order to fulfill an objective. It creates a narrative that allows to analyze in a more detailed way a customer interaction with a service / product (Gibbons, 2018).

Therefore, for each visitor a journey map should be defined.

The museum visitor is becoming more and more a part of the institution as the visitor is invited to create value within the museum. According to Nina Simon (2010) the educational services promote activities in which the visitor is growing its participative role, creating value in cooperation with the institutions. The educational role is growing and becoming more relevant in the museums, these institutions are gradually opening themselves to the public (Figurelli, 2015).

As referred to by Simon (2010) instead of delivering the same content to all visitors, a participatory institution should share in a diverse and personalized way the content they produce with their visitors.

3. Interview Analysis

Following a qualitative methodology, a total of 36 interviews to teachers and legal tutors were conducted. These interviews were divided into two different phases.

In this paper, firstly we'll introduce teachers' data collected, followed by legal tutors' ones.

The interviews collected data about teachers and legal tutors' views on art museums and their educational activities.

3.1. Teachers Interview Analysis

During the first phase of interviews the focus was to better understand teachers' current habits and needs.

Results concluded teachers valued the artistic expressions, stating that their students feel motivated when creative activities are required. Teachers mentioned the need to both visit museum spaces and to receive itinerant projects within the schoolroom, as referred by a Private Education Teacher in the first Phase of Interviews "I am in favor of schools going to creators' workplaces and working together with the professionals - than the other way around.".

Time management was referenced as one of the most important points not to target artistic expressions in the classroom, as the government requires disciplines such as mathematics and Portuguese to be the ones who have the most time dedicated to them.

One of the interviewed teachers mentioned that artistic expressions can be used to deliver other types of areas, making them more dynamic and enthusiastic to students. A Public Education Teacher mentioned in the first Phase of Interviews that "People forgot that the arts help the development of Portuguese and mathematics!". This could be a way to bypass the lack of time referred previously - tackling more than one subject at a time.

When questioned about the didactic materials provided by museums, teachers indicated they end up not being used in the classroom because usually they do not fulfill their needs. As they consider that the materials provided are mainly worksheets for the students to fill in. They suggested the creation of more engaging materials for the students. Perhaps teachers could work together with museum institutions on the development of this kind of materials. As previously mentioned, lack of time also affects after study visits, due to the curricular goals, they cannot do in-depth work.

Much of the teaching material that is given today by museums are small forms for students to fill. I think it would be more interesting if there was something more interactive... Where students could participate and work more on what they saw. [Public Education Teacher - 1st Cycle, First Phase of Interviews] 443

The interaction and active participation of students in the context of the visual arts is stated by the teachers as a motivating point for their students, valuing a multi sensorial experience. By stimulating different senses, students can become more engaged.

Teachers value both the interaction with materials and the ability to participate actively as well as to learn to contemplate the artworks.

When questioned if the ability to touch the artworks would motivate their students, teachers reacted in a positive way. A negative point would be the possibility of damaging the artworks, however teachers mentioned that if children understood its value and, if mediators would explain to them how to proceed, they would respect the artwork.

3.2. Legal Tutors Interviews Analysis

Some legal tutors mentioned that they don't visit art museums or use the educational services due to lack of financial ability, time or lack of interest from their children. Timetables defined by educational services are also mentioned as a reason not to attend their activities.

Even though the drop off activities option is valued by legal tutors, some showed interest in participating in the museum activities together with their children.

I was receptive to doing both. Of course, it was good to let them do these activities and visit alone, with more calm, because unfortunately with them by my side sometimes I can't see the exhibit as well. But I also find it funny to do the activities as a family. So, I'm looking at both scenarios. I'm afraid I don't see many things like that happen... [Legal Tutor of three kids, First Phase of Interviews.]

Interactions and participatory activities in the museum space were indicated as relevant to legal tutors. By

perceiving how artworks are created children can understand and connect more directly with the pieces and its creators. The ability to perceive how the artworks are done is considered a major value to legal tutors. The importance of getting to know the artist's career is considered as an asset as well.

Visits to *Museu do Dinheiro* and the temporary exhibit "Delirium Ambulatorium" at *Museu Berardo* (both located in the city of Lisbon) were mentioned as they represented participatory visits in which their children still remember and felt enthusiastic about. This information collides with Simon's opinion (2010), who defends that cultural institutions can better connect with their audience if they invite them to become an active participant. Besides that, the author also defends that by inviting visitors to participate, the institution can offer transformative experiences without high costs from the production side (Simon, 2010).

4. Proto personas development

Being aware that designing personas would require a more in-depth research, proto personas were created. This process joined the main frustrations, motivations and goals identified within interviews, research and brainstorming, as presented on tables 1 and 2.

Teachers	
Main Frustrations	Lack of Time
	Extensive school program to complete
Main Motivations	Providing students with meaningful experiences
	Acknowledgement of the importance of visual arts
Main Goals	Completing school program
	Providing students with meaningful experiences
	Field trips

▸ Table 1: Teachers

Legal Tutors	
Main Frustrations	Lack of Time
	Afraid of dirtying the house
Main Motivations	Spending quality time with their children
	Their children enjoy new experiences
Main Goals	Spending time with their children
	Providing their children with meaningful experiences
	Finding activities address to different aged children

▸ Table 2: Legal Tutors
▸ Source: the authors.

Thus, three proto personas were designed:

✖ One Child;

✖ One Legal Tutor;

✖ One Teacher.

4.1. Proto persona: Child

João Santos is 11 years old, currently in the fifth grade and lives in Lisbon with his parents. He enjoys having new experiences and loves to draw and play with clay, as well as having fun. João wants to do activities outside his household and to have access to different experiences. He feels that at home his parents don't let him play with different materials as they say he will leave the house dirty. João's main goals are to have the ability to do activities outside his house and spending more time with his parents.

- **Name:** João Santos
- **Age:** 11 years old
- **Location:** Lisbon, Portugal
- **Occupation:** Fifth grade student
- Motivations
- Enjoys new experiences
- Having fun
- Loves drawing and playing with clay
- Frustrations / Pain Points
- At school feels that they tackle a lot of mathematics and he cannot experience the visual arts as he would like
- At home his parents don't let him play with different materials as they say he will leave the house dirty
- He feels he spends a lot of time at school.
- Goals
- Do activities outside his house
- Having access to different experiences
- Spending more time with his parents

4.2. Proto Persona: Teacher

Ana is a 37 years old primary school teacher in Faro, South of Portugal. Ana acknowledges the importance of the visual arts and wants to provide meaningful experiences and new vocabulary to her students. However, for her the extensive school program to complete and unmotivated students, allied with the lack of time and problems with the school infrastructure that don't provide the required needs to develop new activities, make her feel frustrated. Nevertheless she is committed to completing the school program and taking her students to field trips.

- **Name:** Ana Silva
- **Age:** 37 years old
- **Location:** Faro, Portugal
- **Occupation:** Primary school teacher - public school
- Motivations
- Providing students with meaningful experiences
- Acknowledgement of the importance of visual arts
- Providing students with new vocabulary
- Frustrations / Pain Points
- Lack of time

- ✖ Extensive sch ool program to complete
- ✖ Unmotivated students
- ✖ School infrastructure doesn't provide the required needs to develop new activities
- ✖ Goals
- ✖ Completing school program
- ✖ Doing field trips

4.3. Proto Persona: Legal Tutor

For Joana Santos, a 40 years old writer that lives in Lisbon, Portugal and has artistic sensibility. She's a mother of two and loves spending time with them and providing them with new exciting experiences, as she knows this is something that makes them feel happy. However, Joana feels frustrated as she doesn't like it when the house gets dirty but wants to give Luís and Sara the ability to explore new materials. Joana's goals are to spend more time with her children, providing them meaningful experiences as well to stimulate their creativity.

- ✖ **Name:** Joana Santos
- ✖ **Age:** 40 years old
- ✖ **Location:** Lisbon, Portugal
- ✖ **Occupation:** Writer
- ✖ **Children:** Luís Santos, five years old and Sara Santos, 11 years old
- ✖ Motivations
- ✖ Spending quality time with her children
- ✖ Their children enjoy new experiences
- ✖ Has artistic sensibility
- ✖ Frustrations / Pain Points
- ✖ Lack of time
- ✖ Doesn't like to get the house dirty but wants to give to Luís and Sara the ability to explore materials
- ✖ Goals
- ✖ Spending time with her children
- ✖ Having meaningful experiences
- ✖ Stimulate her children creativity

4. Conclusions

This paper allowed us to draw five conclusions.

First, building personas enables the art museum to understand its audience. Visitor's needs and objectives can be assessed in a more direct and efficient way by adapting designing strategies.

Second, this paper indicates that personas represent a starting point for redesigning: the museum space, the visitor's journey and experience. Museums can rethink the visitor journey for each persona, knowing that several journeys can be designed to better access their needs and expectations.

Third, personas allow to simulate a visitor model with differentiating profiles. Since the data collected is not referred to any museum in particular, the presented proto personas can be used as a starting point for any Portuguese art museum to build their own personas. For each one of the designed proto personas a visitor journey can be drawn following a specific museum offer. Thus, different journeys can now be designed and

redesigned, following an iterative process, for different art museum educational services.

Fourth, proto personas are created through brainstorming about the visitors, allowing them to generate tools to start the early planning with a lower budget. Significant costs may be reduced and changes to management practices applied, enabling more museums to apply them and start redefining their focus and actions.

Fifth, the findings reflected upon this paper contribute to practice by providing insights for the construction of a space for creative expression and non-formal education based on the visual arts aimed at children and young people up to the age of 18.

Based on the interviews analysis' we suggest the application of participatory methods within art museums. This study contributes to theory by reflecting on teachers and legal tutors' vision on art museums educational services. We understood that both teachers and legal tutors' feel that they aren't capable of dedicating as much time as they would like to work on the visual arts and museum visits.

This paper expands the investigation of application of the construction of personas and proto personas in the management of educational services in art museums.

It is possible to extract ideas to apply on art educational services – either on the school or museum site. Besides providing meaningful information based on collected material, it also suggests a learning context "Do - Feel - Learn" instead of the traditional sequence "Learn - Feel - Do".

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