Controlled settings and beyond: Reception and action research studies on museum audio description

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1. Introduction: Audio description forging its path in translation studies research

An emerging communication support tool was gaining traction in translation studies by the late 2000s. Pioneering works (Díaz Cintas, Orero Clavero & Remael 2007; Jiménez Hurtado 2007) were paving the way for the recognition of audio description as an intersemiotic translation modality. Fast forward two decades, we can confidently assert that audio description has steadily stepped out from "the shadows of translation" (Rojo López & Ramos Caro 2023, 211).

However, it took a while for this modality to become the focus of scholarly study. While some related initiatives can be traced back to the early decades of the 20th century, it was not until the late 1970s and 1980s that this practice began to take root, initially only in the United States (Fryer 2016; Snyder 2013). Its first aim was to bridge the gap between visual and verbal modes through intersemiotic transfer, primarily for the benefit of blind and partially sighted people. Both theatrical performances and films originally served as testing grounds. By the 1990s, the United Kingdom and Spain were also developing some pioneering projects that eventually led to attempts to standardise this practice (Vázquez Martín 2019). What began as a trial-and-error approach confined to a handful of venues and led by dedicated volunteers transformed over just two decades into an increasingly professionalised accessibility service.

By acknowledging active engagement in cultural life as a human right, the 2006 United Nations Convention on the Rights of Persons with Disabilities represented a key milestone. As awareness of the need for accessibility services has grown, audio description has expanded its reach, targeting a wider audience and being applied in various settings. While screen audio description largely remains at the forefront of research and practice (Reviers 2016; Hermosa-Ramírez, 2022), this accessibility service is breaking barriers and broadening creative horizons across an ever-growing range of settings, including the language learning classroom (Ibáñez Moreno & Vermeulen 2015; Navarrete 2023), video games (Mangiron & Zhang 2025), opera (Eardley-Weaver 2013; Hermosa-Ramírez 2021), dance (Barnés-Castaño et al. 2021; Snyder & Geiger 2022; Zabrocka 2023), science dissemination (Carlucci & Seibel 2020; Holsanova 2020; Navas-Vallejo 2024; Pérez-Montero et al. 2022) and access to natural and architectural heritage (Álvarez de Morales Mercado & Jiménez Hurtado 2016; Álvarez de Morales Mercado & Luque Colmenero 2021; Lax-López 2023).

Museum audio description is no exception. More than ever inclusion and accessibility lie at the heart of the contemporary museum ethos (ICOM 2022). Long gone are the days cultural heritage interpretation was only within the reach of cultural elites (Ginley 2013). With the purpose of reaching out to more diverse visitors regardless of their cognitive or sensory abilities, an increasing number of museums across the world are focusing on the provision of accessibility services, including recorded or live audio descriptive guides (Soler Gallego 2022).

Although the first initiatives were simultaneously developed in the United Kingdom (Cassidy 1991) and the United States, the most influential guidelines come from the North American organization Art Beyond Sight (Salzhauer et al. 1996). They are based on the experiences of art educators, and the initial projects focused on bringing the arts closer to blind and partially sighted people. These seminal recommendations deal with preferred information organisation (an overview of the exhibit followed by the provision of vivid details), language (not interpretative but metaphorical when alluding to complex visual concepts) and complementary resources that can enrich the museum experience (e.g., tactile diagrams, models or soundscapes).

The overarching aim is to help the blind or partially sighted person gradually build a mental image of the object being described, thereby enhancing their understanding and engagement with the exhibit. Almost 30 years after the publication of these recommendations, this purpose is still agreed upon by both practitioners and guidelines (Hutchinson & Eardley 2019). Until recently, there has been insufficient scholarly examination of whether this overarching goal is realised in practice, and whether it improves the museum experience or ensures proper access to the knowledge embedded in the collections (Chica-Núñez & Jiménez Hurtado 2020). The first published studies in this field have primarily been product-based, with corpus studies examining how well guides comply with main guidelines and identifying where traces of the describer's subjectivity can be found, as well as exploring the discourse patterns of this textual genre (Luque Colmenero & Soler Gallego 2018; Soler Gallego & Jiménez Hurtado 2013; Perego 2019). The preferences and needs of visitors have been addressed in experimental and action research studies that combine the perspectives of controlled experimental or quasi-experimental settings with insights gained from close collaboration with both prospective visitors and key stakeholders in the museum sector. In the following sections, we will examine how these research approaches and methodologies, centred around the voices of target users, have contributed to the advancement of the field.

2. Action research: When knowledge transfer is non-hierarchical

Rather than adhering to a standardised research methodology, action research is defined as an approach characterised by its participatory nature, where the researcher is not the sole decision-maker. Scholarly knowledge is applied to address real-world issues or challenges that require innovative approaches. The traditional notion of detached objectivity from empiricism is replaced by the active involvement of the researcher or research team. The research stages are subject to change as the process evolves and can sometimes be cyclical; however, they typically follow three main stages: planning and action to address the challenge, implementing the action, and evaluating the solution or innovative approach (Nicodemus & Swabey 2015).

Generally, these approaches are compatible with conventional qualitative and quantitative methods, though their inclusion depends on achieving the overall goal of creating a positive impact for both the group benefiting from the action and the advancement of research (Neves 2016a).

This approach, grounded in science education practices, has been adopted across various disciplines, including translation studies. In our field, it is increasingly valued for providing the opportunity to examine the object of study "in a more embedded, contextualised manner, with stakeholders assuming more engaged roles than in traditional 'objective' approaches to research" (Nicodemus & Swabey 2015, 164).

In museum practices, pioneering action research projects were initiated in Portugal and Qatar. In both countries (Eardley et al. 2016; Neves 2016a; Neves 2016b), the research team collaborated closely with museums of varying profiles. Overall, these projects yielded an initial rise in visitor numbers, positive feedback on resources, and award-winning accessibility initiatives that acted as an example for museums around the globe and provided valuable insights for the ADLAB guidelines (Neves 2015). These museums also served as testbeds for universal accessibility solutions, such as the influential concept of enriched audio descriptive guides, characterised by "the creative use of description, sound effects and music, to provide thinking prompts that fuel the senses, invite cognitive and/or physical exploration, and capture the uniqueness of the cultural context the guide relates to" (Neves 2016b, 141). While the reported evaluation data for these services appears promising, the process revealed some challenges in meeting the information needs of both blind and partially sighted individuals. For example, tactile directions for exploring haptic materials were removed in one museum, as they were deemed redundant for sighted visitors.

Focusing exclusively on the perspective of Mexican blind and partially sighted people, Castro Navarrete (2015) conducted a participatory action research project that involved an art education workshop. While the term "participatory action research project" may seem redundant, it emphasises the deeper involvement of the target group. In this context, the knowledge hierarchy becomes entirely horizontal. For example, Castro viewed the attendees of her workshop as co-creators throughout all stages of the process.

A myriad of resources were tested during the workshop sessions, ranging from various descriptive styles to tactile materials, multisensory resources, and artwork theatricalisation. This experience resulted in the drafting of preliminary guidelines for art interpretation for the blind and partially sighted. Although these guidelines were conceived as valid clues for the interpretation of related artworks, they provide revealing insights into the factors that can influence the reception of visual art by these visitors. Key considerations include the order of information regarding descriptive and background details, potential preferences for interpretative language, the need to consider how experience shapes imaginative possibilities and the proposal of layered descriptions tailored to the information needs of visitors.

Some suggestions, however, such as the recommendation to consult at least six people to ensure that the use of evaluative language does not solely rely on the interpretations of the describers, may be viewed unfavourably by positivist researchers who prioritise generalisability. Action research has often been criticised for its outcomes being excessively context-bound. Nevertheless, evaluating such a project solely through this lens would be misguided. The primary aim of an action research project is to trigger change that improves the targeted situation (Greenwood 2015; Melrose 2001). Stakeholders and end-users are not regarded as "mere data sources for objective post-hoc generalization" (Greenwood 2015, 205). Some proponents of action research practices even dismiss conventional quantitative and qualitative methods. However, researchers in museum accessibility do not seem to align with this perspective. In all the aforementioned projects, traditional qualitative and quantitative tools were employed at various stages of the process. It is worth noting, though, that the practice of documenting and reporting results in action research studies is often neglected, with up to 75% of works lacking this aspect according to a recent review (Chen et al. 2018, 347). Withholding this information undermines the replicability of these initiatives, where the goal is not necessarily to achieve the same results but to determine whether the identical or adapted procedures could be effective in related contexts.

While action research may not provide broadly generalisable results in the positivist sense, it effectively engages scholars with the real challenges encountered by social agents, stakeholders, and the targeted group. This

approach fosters a unique multidirectional and "polyphonic" (Reviers & Hanoulle 2023, 117) knowledge transfer, enabling the testing of innovative ideas and concepts that can subsequently be investigated through more conventional empirical methods.

3. Reception studies: Rigorously approaching the elusive nature of art and museum experiences

The translation process, whether intersemiotic, intralinguistic, or interlinguistic, inherently involves constructing a profile of the target text's addressee, along with their expectations and needs (Kruger & Kruger 2017). This mentally envisioned addressee significantly influences the selection of translation strategies and techniques.

In the last twenty years, there has been growing interest in understanding how the addressee is construed in the translator's mind, the subsequent impact of this construal on the decision-making process, and the actual preferences of addressees regarding different multimodal text types. This focus has led to a variety of empirical studies, including reception studies. Today, reception studies in this area can be categorised into three main types: those focusing on the cognitive processes involved in the reception of the target text, those analysing the influence of contextual, sociological, or technical factors, and those assessing the impact of specific translation techniques or strategies (Brems & Pinto 2013).

In the pursuit of maximum rigour, generalisability, and objectivity, these studies leverage theories from disciplines such as cognitive psychology and neuroscience (Ramos Caro 2018). Due to the complexity of the reception processes being investigated, mixed methods are typically employed, benefiting from the strengths of combining qualitative and quantitative data. Additionally, both online measures (such as eye-tracking, functional magnetic resonance imaging, and EEG) and offline measures (such as questionnaires) are integrated whenever possible to obtain a more nuanced understanding of the reception process (Orero et al. 2018; Xiao & Muñoz Martín 2021).

Reception studies have proved particularly fruitful in AVT research, especially in both standard subtitling and subtitling for the deaf and hard

of hearing (Wu & Chen 2021). Screen audio description has also stood out (see Rojo López & Ramos Caro 2023 for an updated review), with museum AD following suit. Standard questionnaires, incorporating both closed and open-ended questions, have been the favoured research instrument in studies covering a diverse array of topics such as inclusive design (Hutchinson & Eardley 2021; Szarkowska et al. 2016), soundscape-enhanced audio descriptive guides (Hutchinson & Eardley 2023), indications for haptic exploration (Cabezas Gay 2017), information density (Barnés-Castaño & Jiménez Hurtado 2020; Szarkowska et al. 2016), evaluative and metaphorical language (Kellouai 2023), and minority styles (Barnés-Castaño 2024). In this context, this choice has been motivated by the decision to administer the questionnaire online, either through an app or website, or by simulating a real-time virtual visit with the questionnaire being administered by the researcher during an online meeting (Barnés-Castaño 2024).

Moving the study online is a strategy aimed at mitigating one of the challenges of this research field: the difficulty of reaching a representative number of blind and partially sighted participants in person. The impact of a limited number of participants can also be minimised through careful study design. For instance, within-subject designs, which involve participants evaluating multiple conditions, tend to have greater statistical power compared to between-subject designs, where participants are divided into separate groups to assess different conditions (see Santiago, Meseguer & Valenzuela 2025 for a detailed account on how within-participant comparisons help reduce noise in data analysis).

Another obstacle to the comparability of results across these studies is the predominant use of *ad-hoc* questionnaires. In these cases, each researcher creates a questionnaire from scratch or adapts one based on prior work, ideally guided by a thorough understanding of the construct being studied. However, validated questionnaires should be used whenever possible to ensure that their psychometric properties are favourable. Translated versions must also be validated with the population under study, following international guidelines and best practices (Hernández et al. 2020). In the absence of this possibility, back-translation would be a preferred option over the researcher's own translation.

In contrast to studies on screen audio description, only a handful of investigations have ventured beyond offline measures—and these endeavours have not been particularly successful. The most notable example is the attempt to use portable EEG by Wang *et. al.* (2022). In collaboration with the Titanic Belfast museum and the RNIB, the research team initiated three small-scale reception studies aimed at unveiling the emotional impact that accessible visits can have on blind visitors. These studies combined various online and offline measures, including verbal and non-verbal self-report questionnaires and EEG recordings. Reflecting on the suitability of each research tool for investigating museum accessibility in these reception studies, the authors conclude that "the EEG approach is intrusive, inaccurate and unlikely to be capable of the complex task of distinguishing between simultaneous emotional responses to the AD and other environmental triggers in real situations" (146). Some participants reported experiencing a blend of emotions, such as fear and disorientation, alongside an intense aesthetic experience when interacting with certain museum exhibits. The EEG signals recorded during one of the studies made it challenging to untangle the brain correlates of these intricate emotional and cognitive phenomena.

This mixture of emotions is far from being anecdotal when we consider aesthetic experiences and museum studies involving only sighted participants. Recently, the Spanish Thyssen-Bornemisza National Museum partnered with the University Carlos III of Madrid to investigate the emotional responses elicited by a selection of 125 artworks from various art styles, as an initial step toward developing art therapy interventions (2025). In a controlled setting, these artworks were presented to 127 sighted visitors, whose emotional reactions were monitored using galvanic skin response to gauge their level of arousal, along with facial expression analysis and eye-tracking. This data was complemented by a self-report measure known as the Plutchik emotion wheel, which enables participants to identify their emotional reactions based on arousal and valence.

Using this comprehensive methodological toolkit, researchers have identified the predominant emotions experienced while observing the artworks. The emotions are often mixed in nature, but they tend to lean towards either positive or negative depending on the formal characteristics of the paintings. This is readily apparent in the bar charts featured in the study

paintings gallery on the museum's webpage[1], which enable users to easily visualise the average emotional responses generated by each painting. For example, clicking on the 18th-century painting *The Grand Canal from San Vio* (Venice)[2] by Canaletto reveals that it elicited nearly equal degrees of positive (56%) and negative (44%) emotions, with joy (22%), sadness (31%), and anger (18%) being the most significant contributors to psychological activation.

Conducted exclusively with sighted participants, this study raises the inquiry of whether these combinations of positive and negative emotions would be even more diverse in blind and partially sighted visitors. The emotional responses derived from unmediated access to the formal features of the paintings may not fully represent the experiences of those who listen to an audio descriptive guide, with or without a complementary resource. It warrants further investigation whether the verbal rendering of colour and composition may make these powerful formal features less impactful, especially for those with absent or fading visual memories, potentially leading to a broader spectrum of emotional reactions.

This informative study illustrates how online measures such as galvanic skin response and facial analysis can be effectively employed to investigate art reception. Nonetheless, another factor could further enhance our understanding of these experiences. In most studies, data are gathered either during the accessible experience or immediately after participants listen to a descriptive guide. As a result, these studies provide only a snapshot of the immediate effects on emotional resonance, understanding, and recall. However, at least two studies, both aimed at evaluating audio description as a universal accessibility solution, have adopted a longitudinal approach to enhance the robustness of their findings (Hutchinson & Eardley 2021; Hutchinson & Eardley 2023). This approach revealed that one month after the experience, participants who had listened to descriptive guides were able to recall a greater number of exhibits and their emotional reactions to them. Thus, longitudinal studies can contribute to a more nuanced interpre-

1 https://www.museothyssen.org/especial/emociones-arte/estudio-cientifico/es/emociones

2 https://www.museothyssen.org/especial/emociones-arte/estudio-cientifico/es/obra/gran-canal-desde-san-vio-venecia

tation of the results and facilitate a deeper understanding of the impact of accessible museum experiences beyond the confines of a laboratory setting (Barnés-Castaño 2024).

4. Conclusion: From the lab to the community and vice versa

Research into museum audio description has undoubtedly experienced a surge in the last decade with action research projects and reception studies placing users' needs and preferences at the centre of this field. Although these approaches stem from differing research traditions, they have both significantly contributed to the advancement of the area. Notably, enriched audio description, which started as a proof of concept in early action research projects, has turned out to be one of the most empirically supported audio descriptive strategies both for blind and sighted people across languages and cultures.

Nonetheless, there remains an opportunity for improvement; several best practices can be incorporated into both approaches to increase their effectiveness. Firstly, for the sake of replicability —defined as the ability to implement a project in a similar context— it is crucial that published materials thoroughly document each stage of action research projects. This includes providing nuanced insights into the materials and methods used to tackle pressing issues relevant to the target group.

Secondly, reception studies stand to gain significantly from utilising validated questionnaires that address well-defined constructs, enabling more precise measurements of the variables being investigated. Additionally, adopting a longitudinal approach could uncover valuable insights that have previously gone unnoticed.

While mixed and multi-methods strategies have been employed from the outset to grasp the often elusive nature of the phenomena under study, this discipline would further benefit from triangulating findings with online measures, such as galvanic skin response. Moreover, exploring the neural correlates of these experiences through EEG and magnetic resonance imaging could provide exciting avenues for future research.

By embracing these best practices, we can continue to advance our understanding of museum audio description and its impact, ensuring that our efforts extend beyond the lab.

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Controlled settings and beyond: Reception and action research studies on museum audio description

Abstract

Audio description, as an intersemiotic transfer between the verbal and visual modes, has been increasingly professionalised and researched over the last two decades. This article will focus on the study of museum audio descriptive practices through methodological approaches that amplify the voices of end users. We will investigate the most recent research and the methodological frameworks that have been applied thus far. In doing so, we will take stock of prevailing research trends while also providing insights on how both action research and reception studies can propel the field forward, ensuring that findings and outcomes extend beyond the confines of academia.

Keywords

audio description, research methodologies and approaches, knowledge transfer, reception studies, action research

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