

Museum Development Midlands

Unlocking Data Resource Pack



Oliver Mantell, Director of Evidence & Insight, The Audience Agency
Jacqui Fortnum, Head of Evaluation, The Audience Agency

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Introduction

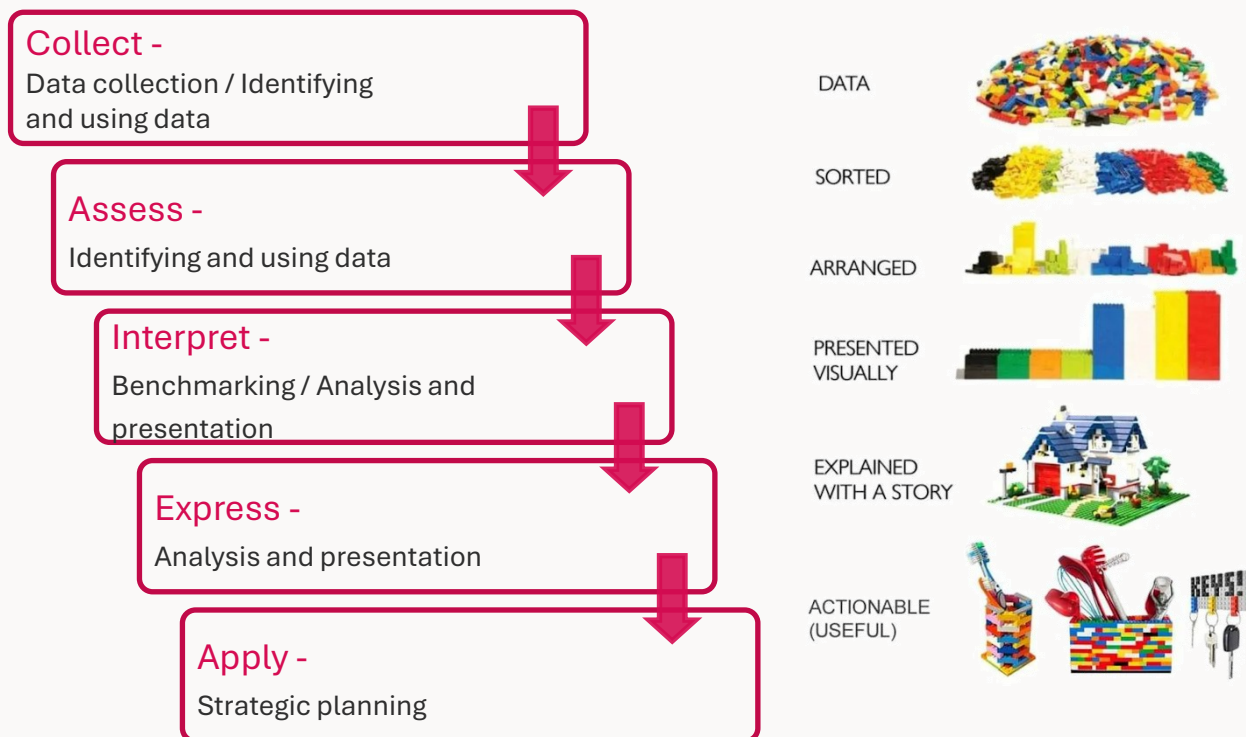
This resource pack has been designed to accompany the Unlocking Data training programme of x5 discursive workshops delivered in 2025-26 by The Audience Agency.

The topics covered by the workshops were:

- Data collection guidance and best practice
- Identifying relevant data sources and understanding how to use them effectively
- Identifying, accessing, and using data for benchmarking
- Effective use of data analysis and presentation tools
- How to use data to inform strategic planning / decision making

In each section of the pack you will find links to further information and resources along with practical tools and templates relevant to each topic; for reference, the slide sets for each workshop are included as a separately appended pdf.

A useful framework which was explored consistently through the programme is the **data journey**, from collection to application:



1. Data collection guidance and best practice

1.1 Research best practice and data security

- **Code of Conduct | Market Research Society**
- **Data protection: The UK's data protection legislation - GOV.UK**
- **Safeguarding Trust: Why we need to prioritise user data security** - guide to the basics of protecting personal data from Culture Hive

1.2 Data collection guidance and tools

- **Top Tips for survey data collection** – advice on how to make survey data collection easier
- **Getting audience feedback** – tips and tricks for engaging participants in your research
- **Fieldworker recruitment, training, and management** – how-to guide
- **Good surveying for arts, culture and heritage organisations** – effective data collection guide
- **Commissioning research and evaluation** – top tips for outsourcing research
- **How to amplify diverse voices in research and evaluation** – inclusive research practice from the Centre for Cultural Value
- **Respect! Making Audiences' Views Matter** - a presentation about how to collect survey data effectively (YouTube)
- **Suffolk Libraries Impact and Engagement toolkit** – developed by TAA with the Suffolk Libraries team, includes examples of different monitoring and evaluation tools including survey question banks and framework models etc.

1.3 Robust sampling

- **How many surveys should I collect?** – information about sample sizes, margin of error, and confidence level

- **How To Calculate Margin Of Error?** – free Survey Monkey tool
- **Sample Size Calculator** - free sample size and margin of error calculator

Questions for you to explore:

- *What do we need to know?*
- *Is primary research needed - what existing data may give us the information required?*
- *Who do we want to participate in the research? (e.g. all visitors, event attenders, members etc)*
- *How are we going to collect the data? (e.g. the method/s and who will be involved in data collection)*
- *What time and resources do you need to analyse and store the data?*

Actions:

- *Review gaps in current understanding*
- *Identify data collection skills gaps and levels of confidence to determine training needs within your team*
- *Establish processes and responsibilities around data analysis and storage*
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2. Identifying and using data sources effectively

2.1 The data landscape

The first step in identifying potential data sources is to think about what you need to know, this may include:

Audiences	Impacts	Operations
Who are they? (Demographics / segmentation profiling)	Economic / financial (e.g. organisational sustainability / local economy)	Revenue (e.g. shop, café, ticket bookings, hires etc)
Where do they come from? (Geography / postcodes)	Social / Community (e.g. social isolation, community cohesion)	Staff and volunteers (e.g. monitoring, wellbeing, development etc)
Why do they come? (Motivations / information sources)	Health / wellbeing (e.g. personal wellbeing for audiences, social prescribing)	Collections (e.g. acquisitions, documentation, digitisation, enquiries, loans, development etc)
How do they engage with you? (Behaviours / activities)	Learning / education (e.g. formal schools and informal audience learning outcomes)	
What kind of experience do they have? (Ratings / Net Promoter Score)	Cultural / creative (e.g. co-creation, sector developments)	
What do they take away with them? (Visit impacts / learning)		
How do they feel about you? (Attitudes / perceptions)		

And then what type(s) of data you need:

		Primary	Secondary
		Data from new research	Existing data sources
Quantitative	Countable	e.g. multiple choice survey responses, rating scales etc	e.g. internal data, national data sets, benchmarks etc
Qualitative	Descriptive	e.g. discussion groups, interviews, vox pops, open response survey questions etc	e.g. sector reports, published evaluations, online reviews / comments etc

Quantitative: Good for understanding what and how much; more easily comparable and useable in calculations.

Qualitative: Good for understanding why and how (thoughts, feelings, values, and opinions); gets deeper and be more compelling but can also be harder to analyse.

Primary: Research can be designed to reflect specific questions/focus relevant to you and your work, but is resource heavy; takes longer and can cost more.

Secondary: Data is less specific and not comprehensive, but can be cheaper, faster, and more robust in terms of sample sizes.

2.2 Internal data sources

You may have more existing data than you think across different teams' and individuals' files and it's important to start by finding out what you may already have available to you, so that any resource you put into new research will be focussed on filling in the gaps.

Whilst sources such as visitor surveys and ticket system data are commonly used and recognised, there are some data sets that are often overlooked; these include ad-hoc visitor feedback, visitor books, Point of Sale data, Event Brite or other external ticketing data, enquiry logs, digital analytics, specific project evaluations, and groups / schools booking data.

A useful approach to determining what data you hold across your organisation, and how useful it may be, is to run a data audit. This activity works best as a cross-organisation exercise which unearths all the information you hold in different data pots; an audit template is included in the **appendices**.

2.3 External data sources

- **Explore local statistics** – Office for National Statistics data explorer, can be used to find, compare, and visualise population census data for a specific area (e.g. postcode, local authority, region, parliamentary constituency etc)
- **Statistics at DCMS - Department for Culture, Media and Sport** – national engagement survey reports and publications, including Community and Engagement Survey data (ongoing survey of people aged 16 and over in England, designed to explore how people across England engage with their community and with culture, media, and live sport) which also includes sector-specific findings - **Community and Engagement Survey 2025/26: museums and galleries**
- **Culture and Place Data Explorer** – Arts Council England tool which you can use to build a detailed picture of what culture and creativity look like in any area, from a regional level down to neighbourhoods of around 1,500 people
- **UK Tourism Industry Statistics & Research** – Visit Britain international, national, and regional tourism insights
- **Sector Data** – UK-wide evidence around key audience trends and insight through The Audience Agency's Audience Answers platform, including findings from the **Cultural Participation Monitor**
- **Annual Museum Survey** – annual reporting from the Museums Development England survey
- **Research Digests by the Centre for Cultural Value** cover various topics, for example:
 - **Lifelong cultural engagement**
 - **Placemaking**
 - **Environmental heritage and place**
 - **Cultural vitality**
- Summary presentations of data by place within the Midlands, from The Audience Agency (YouTube):

- **Staffordshire and Shropshire**
- **East Midlands**

Questions for you to explore:

- *What data systems do you use? / How are you using them?*
- *What do you need to know? / How will you find out?*
- *What are the key challenges? / How can you address them?*

Actions:

- *Data audit*
- *Identify key questions*
- *Explore and identify key data sources*
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3. Effective benchmarking

3.1 Data informed objectives

- **KPIs for audiences** – guide to setting informed Key Performance Indicators
- **Using evidence for setting audience metrics** - tips for setting and monitoring audience-related goals

3.2 Benchmarking in practice

- **Net Promoter Score** - summary video on how to calculate it
- **An introduction to benchmarking** – guidance article
- **Data Comparisons** – identifying a base and defining populations
- **An introduction to indexes** – guidance article
- **Examples of benchmarking projects:**
 - **Annual Museums Survey, Museum Development England**
 - **ALVA Visitor Experience & Financial Benchmarking**
 - **Visit Britain Domestic Sentiment Tracker**
 - **Audience Answers**
 - **UN Tourism's World Tourism Barometer**
 - **A Creative West Midlands from Culture Central**: including comparisons by region and local authority within the West Midlands

Questions for you to explore:

- *What are your development aims? And what are the objectives linked to each aim?*
- *What data do you need to set realistic and effective KPIs?*
- *What benchmarks are / will be useful for you? (thinking internal and external sources)*
- *What are the key challenges to identifying and using benchmarks? How can you address them?*

Actions:

- *Review aims and objectives*
- *Identify useful benchmarks*
- *Make a plan for building / using these benchmarks*
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4. Data analysis and presentation

4.1 Presenting data

- [Using Evidence for Advocacy](#) – key issues to consider when turning data into evidence for advocacy (e.g. funding bids, evidencing impact etc)
- **How to share research and evaluation findings through performance** – Centre for Cultural Value guide to data storytelling approach developed by Dr Martin Glynn. The guide includes tips on how to jumpstart your creative process while also outlining how you can engage practitioners to present your research and evaluation in alternative ways.
- **How to write a learning case study** - This ‘How to...’ guide, developed by Emma McDowell at the Centre for Cultural Value, provides practical tips and guidance for writing case studies.
- **FT data visualization style guide** - an interactive site to help you find the best way to present data of different types
- **Decluttering visualization** - a video from Storytelling With Data about making data visualisations clearer and more impactful.
- **Data visualisation: what a wonderful world it could be** – graph do and don’ts, and free insight tools in a blog post from Tyne and Wear Archives and Museums
- **Creating beautiful infographics** – guide to producing data charts and infographics, AMA blog

4.2 Examples of creative data presentation

- **British Museum Object Journeys evaluation** - The first Object Journeys project worked with 10 London-based young adults of Somali heritage. Alongside a series of workshops exploring and researching the collection, the group co-curated a new display case, focusing on Somali craftwork, and hosted a lively programme of Somali cultural events. TAA evaluated the project and poet Theresa Lola responded to the feedback collected from participants, which explored their impressions of the project, its impact and thoughts, to create a new piece of work which is presented in this video.
- **British Library - Living Knowledge Network Unearthed exhibition programme evaluation** – This report presents the exhibition evaluation data in a number of

different ways. The visual exec summary uses infographics, images, key statistics, and quotes along with embedded audio clips from visitor vox pops (click on the headphone icon to listen to the recordings).

Questions for you to explore:

- *What are the key challenges at different stages of analysis? / How can you address them?*
- *In what ways might the different approaches to analysis be most useful to you?*
- *Who are you sharing your data with?*
- *What approach to presentation will be most compelling for them?*

Actions:

- *Test out different analysis approaches with your data*
- *Identify the story you want to tell*
- *See what you can cut out – clarify your story*
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5. Unlocking data to inform strategic planning

5.1 Strategic planning approaches

There are many approaches and frameworks for strategic planning. Here are a few that we think are helpful:

- **Audience Development Playbook** - a practical resource for organisations ready to rethink, reset or refine their audience strategy.
- **Barbara Minto's frameworks** – article on using the SCQA (Situation, Complication, Question, Answer) approach and the Pyramid Principle
- **The kernel of strategy: Richard Rumelt** (see bibliography)
- **Mintzberg's 'bottom-up' approach to strategy** - development and implementation (see bibliography)

5.2 Principles of using data in planning

- **The DIKW pyramid** - (Data, information, Knowledge, Wisdom) is well described on Wikipedia.
- **The challenge of using measures as targets** - an explanatory video (i.e. Goodhart's Law)
- **Using data to inform your fundraising** – Digital Heritage Lab webinar

5.3 Planning analysis tools

You may find the following tools useful for bringing your data into strategic planning. These are particularly helpful for guiding and informing internal cross-team discussion and strategic planning workshops.

Templates for each tool are included in the **appendices**.

SWOT, TOWS, and SOAR

SWOT is a very commonly used framework for analysing your current situation in terms of internal **S**trengths and **W**eaknesses and external **O**pportunities and **T**hreats. However, using the less well-known TOWS and SOAR models you can build on a SWOT analysis to identify actionable options and build a more strategic view.

TOWS aligns your internal strengths and weaknesses with external opportunities and threats.

S/O strategies - Use strengths to take advantage of opportunities

W/O Strategies - Minimising weaknesses by taking advantage of opportunities

S/T strategies - Using strengths to overcome threats

W/T strategies - Minimising weaknesses to overcome threats

For example:

		Internal	
		Strengths	Weaknesses
		Free / low-cost family programme with multi-generational appeal	No direct marketing strategy aimed at local audiences
External	Opportunities	Work with the organisers to host festival activities at your site	Work with the festival organisers and other partners to promote your ongoing family programme
	Threats	Messaging focusses on low cost / free element and links with trusted festival	Work with local partners on further joint promotion campaigns and to build your mailing lists

SOAR takes the **S**trengths and **O**pportunities identified in your SWOT analysis and puts them in the context of your internal **A**mbition (what you want to achieve) and the external **R**esults (the wider external impacts of your work) to bring a sense of ‘So What?’ to your strategic planning.

Questions for you to explore:

- *What's your strategy story?*
- *What are your strategic priorities?*
- *What data do you have already?*
- *What do you need the data to do for you, in the context of planning?*
- *What other data do you need to inform confident decision making? And where can you find it?*

Actions:

- *Discuss and agree your organisational priorities with your team(s)*
- *Identify the data you have, and what you need*
- *Draft your plan*
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Appendices

I. Bibliography

- Good Strategy, Bad Strategy, Richard Rumelt (ISBN: 9781781256176)
- The Pyramid Principle, Barbara Minto (ISBN: 9781292763255)
- Everything is Predictable, Tom Chivers (ISBN: 9781399604055)
- Simply Managing, Henry Mintzberg (ISBN: 9780369308436)
- Tempo, Venkatesh Rao (ISBN: 9780982703007)

II. Workshop slide set

PDF of workshop slide sets containing additional information and links, supplied as a separate document.

III. Offline resources

Content from TAA online resources, supplied as a separate document.

IV. Templates

Data audit

Section 1 – your existing data

What audience information do you collect?	How is the information is collected?	Who / what is it for?	VUMI data test	Robustness rating
E.g. demographics, postcode, experience rating etc	e.g. visitor survey, feedback form, ticketing etc	E.g. reporting, funding bids. Is it shared, with who?	Is the data: V ital / U seful / M erely I nteresting	e.g. rate /10 - how up to date it is, size of sample etc

Section 2 – the data you need

What evidence / information are you missing?

e.g. how visitors found out about you, first time / repeat visitors etc

Is there anything you need to know more about?

e.g. specific audience groups, spend, dwell time etc

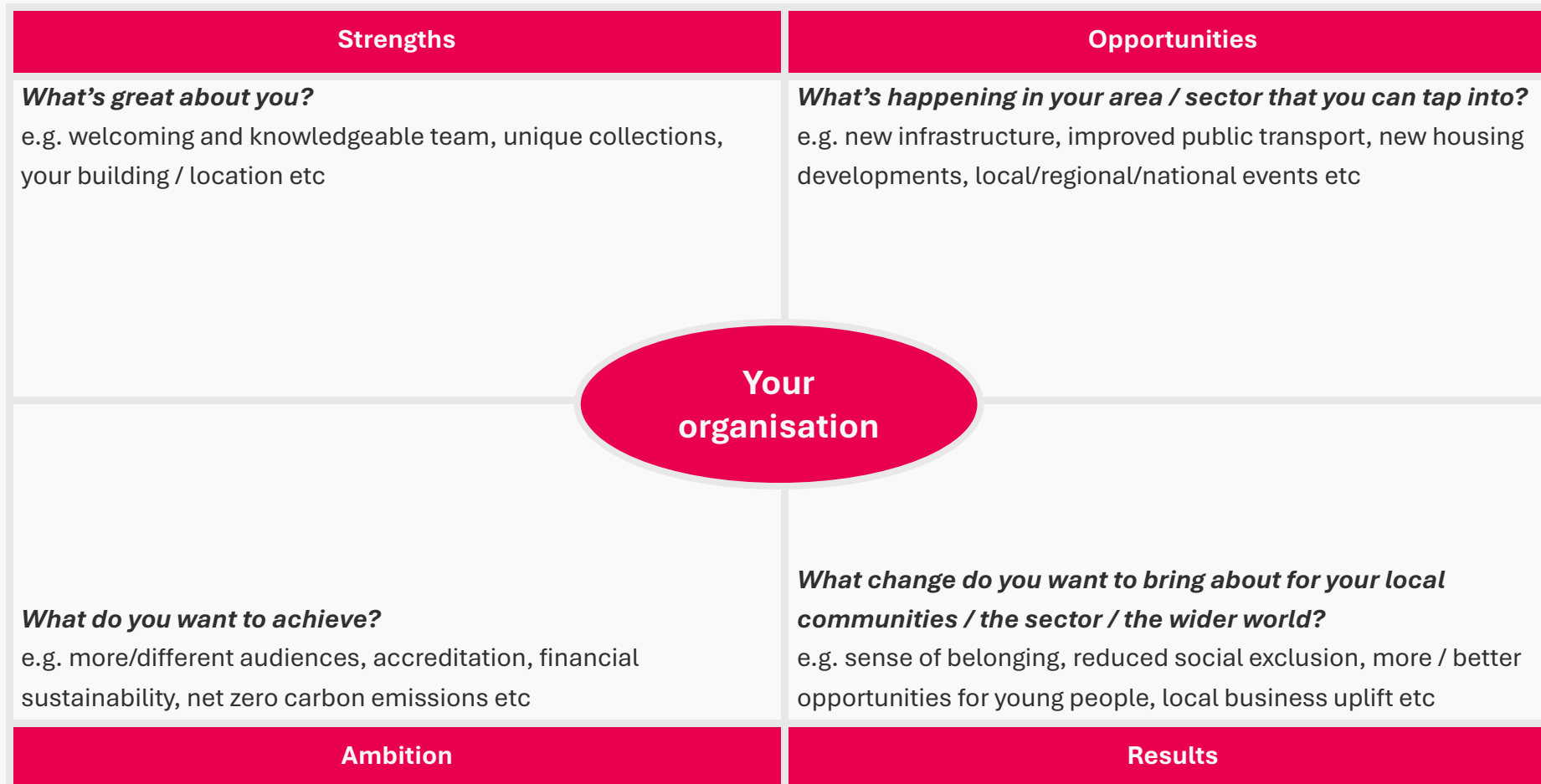
Why do you need further information?

e.g. to inform strategic programming, marketing campaign, funding bid, stakeholder reporting etc

TOWS

		Internal	
		Strengths	Weaknesses
External	Opportunities		
	Threats		

SOAR





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Registered Address: The Whitehouse, Wilderspool Business Park, Greenalls Ave,
Stockton Heath, Warrington WA4 6HL

theaudienceagency.org