

Museum Development Midlands

*Unlocking Data Resource Pack –
appended offline resources*



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Introduction

This appended document includes the content from links to The Audience Agency's online resources referenced in the main resource pack.

This is to ensure that access to the information continues to be available if the website content moves or changes overtime; content from external links has not been included due to IP and copyright considerations.

The headings and content titles align with the main resource pack content.

1. Data collection guidance and best practice

1.2 Data collection guidance and tools

Top Tips for survey data collection

Audience survey collection is often one of the only ways non-ticketed organisations are able to find out more about who their visitors are and there are no shortcuts to collecting this information.

However, there are some things you can do to help make this easier...

Tips for embedding data collection with staff:

1. Data collection benefits all staff and departments, so make surveys and research are part of job descriptions, particularly within front of house or visitor services.
2. Give those collecting the responses access to reporting and outcomes of their efforts – this is really easy within the Audience Finder dashboard.
3. Provide training for fieldworkers. This will instil confidence with your staff or volunteers about what is expected as well as teach them skills and offer them opportunities to ask questions about the process.
4. Consider rewards, particularly if you are working with volunteers – but be mindful to encourage quality rather than quantity.

Tips for encouraging more people to complete responses:

1. Try offering incentives, remember these should be neutral to your programme offer to avoid encouraging bias. Contact details can also be collected separately to ensure visitors feel confident about the anonymity of their responses.
2. Think carefully about where in your space you conduct the interviews. It should be towards the end of their visit, but not necessarily at the exit - at that point, they probably just want to leave. Near seating is always a bonus, particularly when interviewing families.
3. Be upfront about how long the survey will take – for example with the Audience Finder core questionnaire it should only take five minutes.

4. Be clear about why you need their feedback – whether it's to improve your services, monitor your engagement in the local community or help to apply for funding.

Getting audience feedback

We recognise that there isn't always the time or resources to commission someone external to deliver evaluation. Neither is it always the right approach. It is really great to be able to support participants, who are co-creators of work for wider audiences, to develop skills to evaluate their own work.

Some key tips for supporting participants to get involved in evaluation:

1. Encourage participants to think about motivations – ask them why finding out what audiences think is important. Why is it valuable to them?
2. Dispense with the lingo. The terminology around both visitor research and evaluation can be dry and work-speaky. Keep it simple – 'finding out what our audiences think' is a good start.
3. Think about what your organisation is already doing. Participants' skills may be best placed to gain rich qualitative feedback, which complements surveys or booking data.
4. Highlight to participants how transferable these skills are – listening, interviewing, digital and creativity to name a few. Invest the most time in supporting participants verbal communication skills – I find participants can be most nervous about how to talk to audiences.
5. Prepare to be inspired – your participants may know your audiences and environment even better than you. They will probably come up with some refreshing and new ideas for capturing feedback.
6. Storytelling is key – encourage participants to frame evaluation as a way to tell the story of an event, display or show – who are the key characters, scenes, major events, conflicts; are there cliff-hangers or happy endings?

Fieldworker recruitment, training, and management

Fieldworkers are a critical component of the research process and choosing the right people for the job will help you achieve both a great event and gain useful information about an audience.

When implementing any survey methodology which includes face-to-face interaction there will be at least one person on the day to collect data, be that a volunteer, member of staff or professional fieldworker. This guide aims to lead you through the key points of what makes a good fieldworker and how you go about recruiting, training and managing them.

The perfect fieldworker

Fieldworkers should both reflect the spirit of your event, and be able to collect useful audience information. Here are some characteristics of a good fieldworker:

- Good communicators - happy approaching and talking to people they do not know and are aware of the rest of the event. Audiences will associate them with the event so they need to know what is going on and be able to represent your organisation.
- Organised – they show up on time, take the methodology seriously, are well prepared and aware of what equipment is required.
- Reliable and accurate – they are able to follow directions, pay attention to detail, store data sensibly and appropriately and take pride in doing a job well.
- Sensitive – they are aware of data protection and access issues and have an understanding of the audiences' perspective.
- Personable - friendly and smiling, they should be able to relate to your target audience.
- Flexible – they are able and willing to work irregular hours, such as evenings and weekends.

If fieldworkers are not confident enough in the role assigned to them, they are more likely to only talk to people they know or identify with. This will not give you the range and breadth of information needed from a representative sample of your audience.

Organising the team

Fieldworkers, and volunteers in particular, need clear and consistent direction to be happy and effective in their role so make sure adequate time and resources are allocated to manage them.

It is important to be clear within your organisation what their role will be and who will be their main point of contact before recruiting. Staff capacity will affect the size of the

team an organisation can manage, however if you are using volunteers, it might be that you decide the managerial role is a volunteer post too.

Recruiting volunteers

There are lots of people looking for volunteering opportunities in the arts as a means of gaining work experience, as an opportunity to connect with others in the arts and to experience new things. To be sure you get the right volunteers for this specific role, it is vital to put some time and thought into the recruitment process.

Descriptions of the role should be clear and sound appealing, try to avoid generic opportunity titles such as 'Volunteer' or 'Admin assistant'. Keep the opportunity description short, snappy and straight to the point avoiding jargon and acronyms. Things to include:

- What does the role involve?
- Who will they be working with?
- What skills will they develop?
- What benefit will their volunteering bring to the organisation and to them personally?
- Are there any skills or experiences which are necessary?
- What will the time commitment be and what can they expect in terms of expenses?
- Who should they contact?

Recruitment text example:

Research Assistant

Meet artists, producers and local residents and learn audience research skills in an arts organisation. Our organisation needs friendly, reliable volunteers to help us discover what the public think of the festival.

Commitment: Half-day training on [date] and 8 hour shifts on any day [date/s of activity]. Travel expenses and lunch provided.

Contact: Emma at emma@example.gov.uk to register your interest.

Where to advertise

Target your advertising to avoid over subscription and consider the most logical places first:

- Existing networks or previous volunteers
- If the event is held at a particular place, there may be volunteers attached to the venue
- Involve partners or community groups linked to the event, use their networks.

Other options may include local Volunteer Centres, Student Services department of colleges/universities, or back-to-work employment initiatives.

Training and support

Regardless of the level of experience a fieldworker might already have, some training will always be necessary. Training sessions should typically cover:

- Background on the event
- Practicalities – what will happen on the day
- Roles and responsibilities
- Sampling – how to achieve representative profiles of an audience
- How to encourage people to take part in the research
- Interview techniques
- Practising the interview
- Dealing with sensitive questions
- Data protection and Market Research Society codes of conduct

It is also good practice to ensure that fieldworkers are supervised, or have a contactable supervisor, particularly during the early stages of data collection to make sure that they are comfortable with their role, the research approach and that they are doing an effective job.

Reward and recognition

It goes without saying that fieldworkers, especially volunteers, need to be thanked for their efforts and made aware of how vital their role is. Although volunteers should not receive payment for their services, think about opportunities you can offer them to become more engaged with your organisation, or ways of expressing recognition of

training and skills learnt. This can be tailored to suit their motivations for volunteering in the first place.

Legal considerations and expenses

Make sure to consider the following:

1. Volunteers must be able to conduct the research safely – this might mean getting volunteers to work in pairs, especially if the research is taking place after dark.
2. Expenses should be given to volunteers for any out-of-pocket expenses – typically travel and food with proof of receipt.
3. Unpaid, voluntary work can be a politically sensitive issue – make sure you are complying with national minimum wage legislation.
4. Be aware that any agreements formed with volunteers describing what they intend to commit to an organisation cannot be considered binding contracts; otherwise they should be treated as paid employees.

Good surveying for arts, culture, and heritage organisations

Effective audience / visitor research is about much more than counting participants. It helps you understand who is engaging - and who is not - while providing valuable insight into audience experiences, motivations, and needs.

Here's our guide to doing it well.

Start with clear objectives

First, consider the following questions:

- What decisions will this data help inform?
- What information do you actually need?
- What resources do you have?
- How will the data be collected?
- What questions need to be asked?

Taking time to think these through will help ensure that research remains focused, practical and is not too much of a drain on valuable time and energy.

A survey is the right tool if...

- You need measurable, quantifiable results

- You can reach a sufficient number of people
- You are able to gather responses from a sample that represents your wider audience
- There is no simpler or more efficient way of obtaining the information required.
- Otherwise, alternative approaches such as interviews, focus groups or observations may produce more useful insights.

Planning the research: what to consider.

Once objectives are clear, you can begin practical planning. You'll want to consider:

How?

Options may include face-to-face interviews, online surveys, self-completion questionnaires, or a combination of methods.

When?

Surveying can take place before, during, or after an event or programme. Some organisations may benefit from repeating surveys periodically or adopting a longitudinal approach to track changes over time.

Who?

The people collecting data also play a significant role in research quality. Staff and volunteers should be appropriately trained, understand the survey process, and apply methods consistently.

Data management

Good planning should also address data management responsibilities, including compliance with GDPR, secure storage of information, and processes for sharing and analysing results.

What does a good survey look like?

Every question should serve a clear purpose. If information is not needed, it should not be collected.

- Use plain language and avoid jargon.
- Neutral, non-leading questions
- A logical question order that reflects the visitor journey. More personal or sensitive questions are usually best placed towards the end of the survey.

- All questions are answerable and provide opportunities for respondents to opt out of personal questions if they prefer.
- Collecting full postcodes opens up opportunities for further analysis (e.g. Audience Spectrum segmentation)

Importantly, surveys should always be tested before being launched.

Understanding sampling

You'll want to ensure that the people who participate in your research accurately reflect the wider population being studied (in this case the 'population' is all your visitors / audience).

A good sample should be large enough to provide confidence in the results while also reflecting the diversity of the audience. It should cover the full programme rather than focusing on a limited number of events or activities.

How many responses should you collect?

Two concepts are particularly important when determining sample size:

- **Confidence level** refers to how certain we can be that survey findings reflect the wider population.
- **Margin of error** indicates how much results may differ from the true population value.

A commonly accepted standard is a 95% confidence level with a margin of error of plus or minus 5%. So as a general rule, around 380 completed surveys are often sufficient to achieve this level of accuracy for many audience studies, regardless of population size.

The importance of representation and avoiding bias

Research becomes skewed when some groups are overrepresented while others are excluded or underrepresented. This can happen for several reasons.

Limited staff availability may result in surveys being conducted only on certain days or at certain times. Research methods may unintentionally favour some visitors over others. Surveyors may also unconsciously approach people who appear friendly, approachable, or similar to themselves.

Several practical strategies can help minimise this risk:

- Collect data across a variety of days and times.

- Increase surveying activity during busier periods.
- Consider where surveying takes place – is it quiet? Is there somewhere to sit?
- Use random selection methods, such as approaching every second visitor.
- Employ face-to-face surveying where appropriate to reduce barriers to participation.
- Actively encourage a wide range of people to take part.

Conducting effective interviews

A good interviewer approaches participants confidently, explains the purpose of the research clearly, and obtains informed consent before beginning.

Consistency is essential; questions should be asked exactly as written, without alteration or interpretation.

Interviewers should remain neutral, avoid expressing personal opinions, and reassure participants that their responses will remain confidential.

Participants should be given sufficient time to consider their answers, and interviewers should remain patient, polite, and appreciative throughout the interaction.

Analysis, reporting, and action

Surveying is only valuable if the findings are analysed and used effectively.

Consider who will be reading the results and what decisions the findings are intended to support. Reports should provide context by explaining the methodology, data collection dates, sample size, and margin of error. Findings should be presented clearly and linked back to organisational objectives, targets, or key performance indicators wherever possible.

Visual communication can make results more engaging and accessible. Charts, maps, infographics, and summaries often help stakeholders understand findings more quickly than tables of data alone.

Most importantly, research findings should be revisited and used – don't let your hard work languish in a drawer somewhere!

Commissioning research and evaluation

A tick list of top tips for making sure you're getting the most for your money when putting together a brief.

Whilst some arts organisations have teams who commission external research, we know that when it comes to learning and engagement projects, it can often be down to individuals to create the brief and find the right consultant to work with. Here are some of our top tips.

How much time and money do I need to do good research or evaluation?

Research and evaluation doesn't need to be expensive – and if you're on a budget, we'll often suggest cost effective and DIY methods. Be aware that these may involve a significant time investment on your part, and some elements of your research will probably require specialist skills.

Ultimately, the depth and breadth of what the work can achieve depends on a mix of time and budget. If you're not sure if what you want is realistic given these constraints, we're always happy to give some indications of what might be doable, and you can give consultants or agencies a call if you want to get a sense of if you're heading in the right direction.

What makes a good research or evaluation brief?

The three areas which have the strongest influence on how we respond to a brief are the aims and objectives of the research, the budget, and timings – so it's worth making sure you're really clear about these.

- What do you want the research to achieve and what will its impacts be? Try and boil this down to the essentials.
- The budget will help us consider the most effective way of meeting your brief within the resources you have, so don't be shy to include it. We don't use the budget as a target price to come in at, rather a guide to the upper limit of what you can spend.
- Timings may have a big impact on the methodology, and how we measure the impacts of your work.

The process

Allow enough time for people to respond effectively – at least two-three weeks but ideally a month. This will help potential partners pull together a proposal that considers

your needs and allows for people being on holiday or having their heads down finishing other projects. We always like to have a think about how we might approach a project, rather than give generic responses

If you can, include an email address for any questions people might have about the brief. It's also helpful if all questions and answers are collated and distributed to all those pitching, so you don't keep getting asked the same question. If you do this, make sure you mention the closing date for questions, and when you'll need responses by.

Some final tips...

- Try to be open about the methodologies you want the research to use, if at all. For example, questionnaires might seem like a good idea, but your evaluation might benefit more from a series of in-depth case studies. Suggestions can be useful, but the main thing is explaining what you need the research to achieve – and then those responding to your brief can suggest how you might get to this point.
- Think about what the research 'Must', 'Should' and 'Could' achieve. Being clear about this in the brief will help providers prioritise the most important elements.
- It's easy to forget but saying whether the budget includes VAT or not is really helpful.

1.3 Robust sampling

How many surveys should I collect?

We recommend that organisations should aim to collect 380 surveys. This number will give results at around the 5% margin of error at the 95% confidence level.

We understand that there is a trade-off between level of accuracy you want to reach and feasibility of obtaining a large sample size within the budget and resources available. However, collecting at least 380 responses will give results which, if sampled well, can be relied upon to represent your audiences. This is generally true of most organisations.

What does margin of error and confidence level mean?

The margin of error and confidence level are two measures that affect the accuracy of your data.

Margin of error (or confidence intervals)

In short, this is the deviation between the opinions of your respondents and the opinion your entire audience population. For example, you set your margin of error on 5%. If 70% of your survey respondents rate your new exhibitions as 'Very good', a 5% margin of error means that you can be 'sure' that between 65% (70%-5) and 75% (70%+5) of your audience population thinks your new exhibition is very good.

Confidence level

This tells you how often the percentage of the population that thinks your new exhibition is very good, lies within the boundaries of the margin of error. Or, following on our previous example, it tells you how sure you can be that between 70% and 75% of the population thinks your new exhibition is very good. Suppose you chose the 95% confidence level – which is pretty much the standard in quantitative research – then 95% of the time between 70% and 75% of the population thinks your new exhibition is very good.

Audience Size	Sample Required
100	80
500	217
1,000	278
10,000	370
100,000	383
500,000	384
1,000,000	384

Sample size required by audience size to give a confidence level of 95% and a margin of error of 5%

3. Effective benchmarking

3.1 Data informed objectives

KPIs for audiences

This guide explains what Key Performance Indicators are, why you should use them and how do you balance them with your funders goals and targets.

It also includes our top tips for setting and implementing your own organisational KPIs.

What is a KPI?

A Key Performance Indicator (KPI) is a measurement of progress of particular importance to one's success.

You could happily substitute metric, target, measure, impact to broadly similar effect.

Why set KPIs?

Setting KPIs helps define success, and monitoring them enables an organisation to adapt its actions and behaviours on the way to that success.

If used effectively, KPIs are a vital and welcome tool, enabling organisations to make their aspirations and rhetoric a reality, not just once, but reliably into the future.

You can read more about KPIs generally, and their wider use in the world of business [here](#).

Audience KPIs

KPIs are usually plotted against the whole business, using a performance management system like the **balanced scorecard**.

For example, setting indicators for financial, HR and operational performance alongside those for visitors and participants.

Getting the right information about audiences is perhaps the most challenging area of all, because there are so many ways of measuring success, and the information you need is not all held within your organisation.

This is what we tackle next.

It's not (all) about the money: the triple bottom line

Performance management was developed by commercial business with the simple, ultimate goal of generating financial profit.

Cultural organisations are trying to balance a more complex set of aims.

However, like many other processes, we can usefully adapt it to meet our needs. Think then about a balance sheet for your organisation with 3 different areas of accountability:

- Financial: sustainability, margins which enable development
- Social: serving specified communities (location or interest)
- Cultural: achievements in creating particular kinds of quality experiences

How would you describe the triple bottom line of your organisation? Your KPIs should reflect the right balance.

Funder KPIs are not your KPIs

Funding organisations also have audience KPIs but it's important to note these are NOT the same as those of their funded clients.

Arts Council England, for example, measures success in terms of the reach and fair distribution of its funding, so it has set KPIs for the percentage of the national population directly experiencing the work it funds, and the geographic distribution of that percentage. Funders often need your support in monitoring these KPIs, by supplying annual metrics about your work and audiences. This intelligence in turn helps them to make the case to central or local government for public support.

However a KPI about the percentage of the national population an organisation serves, is unlikely to be practically useful to the organisation itself.

Your KPIs should be linked directly to your own success, not to be confused with reporting to a funder.

Bear in mind however, that funders increasingly expect the organisations that they support to be able to demonstrate the achievements for which they have been funded, and to show them in terms of growth and progress.

Top tips for setting good KPIs

1. Gather the decision-makers

Senior managers across the organisation need to agree the process for setting, monitoring, reacting to, and reviewing KPIs. They also need to agree what resources are available.

Example: At a dedicated meeting between Artistic, Executive, Marketing and Commercial Directors and Head of Front of House, we discussed the audience strategy for the next two years and nominated the MD to draft some KPIs to help us follow the route map. These were to be signed off at the next Senior Management Team meeting and included as a standing agenda item at SMT meetings on a quarterly basis. KPIs should also be reported at end of show de-briefs.

2. Turn your mission into audience objectives

How does your vision / mission and strategic aims relate to audiences or visitors? This may already be explicit, but if not, you need to think through how these might relate to audience objectives. These also form the basis of an audience plan, but also the goals from which indicators can be developed from. There may be different goals for different types of audience, or segments.

Example: We are the leading contemporary visual arts venue in the region, dedicated to bringing the best international and UK work to local audiences. We are committed to producing, commissioning and presenting works of the highest standards, enabling unexpected collaboration between artists.

Our strategic objectives are to:

- Generate an accumulated surplus of XXX by XXXX
- Produce at least 20% of our own work in the next 2 years
- Develop XX% revenue through low-level donations
- Boost the international profile of XXX

Our key audience objectives are then to:

- Increase income through membership (annual target £XXX)
- Maximise income through the gift shop

3. Set KPI(s) for each objective

Ask yourselves what success will look like or how will we know when we get there? What is the best indicator for that success? What level of detail will be the most useful?

4. Define an appropriate timescale

How long will it take you achieve goals and what are the indicators along the way? Audience KPIs will look very different for long-term organisational goals, by season, or one-off project aims. Decide what period you are monitoring and how often data will be collected.

Regularly monitored KPIs (daily, weekly, monthly) are the most effective.

5. Contexts

Compared to what? To add real meaning to progress it is useful to be able to compare results on other measures. With your own performance (trends over time), with benchmarks, or with general insight about audiences, or the population.

6. Data-collection and analysis

Once a set of indicators is drafted, you need to consider how the relevant data for measurement will be collected. The resources this takes – such as staff time, outsourcing, IT etc. need to be proportionate to the gain you anticipate.

Note: it can be a false economy to add these duties to overloaded staff without the relevant skills, especially in research design or analytics.

7. Process for communicating and decision making

Obviously the larger the organisation, the more filtered communication of KPIs needs to be. Ensuring a good match between KPIs and staff who have an interest in them is essential to getting buy-in. On the other hand, non-decision-making staff, like FOH, can find KPIs very motivating. Communicating results in compelling but relevant ways relevant is also crucial – so someone in finance might prefer a spreadsheet, while others might prefer fancy infographics.

Note: Dashboard technology has revolutionised the use of KPIs because they have made information so much more readily accessible. You can build your own – there's freeware available – commission some one-off help, or use those embedded in tools like Audience Answers or Google Analytics. But don't let the tail wag the dog – make sure it shows the info you NEED.

8. Taking action and reviewing

Ultimately this is the acid test of KPIs. Regular monitoring must lead to planned action in response to positive or negative variation. Pre-agreed forums for decision-making and nominating people with the responsibility to take action in advance are all strongly advised. Don't forget to review the KPIs themselves, adding new ones for specific projects, and stripping out what's not working.

Once you have a draft of potential KPIs, check to see if they pass this test:

- Clear: is it clear what you are measuring and why?
- Crucial: are your KPIs of organisational importance and likely to affect crucial decisions and actions?
- Collectable: can you actually get the data you need for measurement with a reasonable level of resource?
- Consistent: will you be able to track this KPI over time consistently to assess progress?
- Contextualised: will you be able to compare results, with other relevant organisations, with the population? Can you access this information?
- Communicable: are they easy to represent and understand – both metrics and their implications? Will your KPIs motivate or irritate relevant colleagues?
- Channelled: who will be responsible for taking action to address?

9. Less is more

The number and complexity of KPIs that can be usefully employed are relative to the size and capacity of the organisation. As a rule of thumb, though, less is more. There's only so much information a department or organisation can maintain its focus on, that's why getting to the crux is so important.

10. You don't have to get it right first time

Experts suggest that it can take a long time to settle on a handful of meaningful KPIs so do experiment and drop things that aren't working – though be sure to give them long enough to find out.

Using evidence for setting audience metrics

Top tips for setting and monitoring audience-related goals and metrics.

Time was, most self-respecting museums and arts organisations managed to function quite happily without metrics, SMART objectives, stated outputs and outcomes, negotiated targets or any other of the raft of reductive, public accounting-speak quantifiers latterly invented. Or did they?

We may not have used the jargon, but over the years most successful enterprises, be they largely interested in profit, art, learning or the social good, have been good at quantifying what they want to achieve, whose needs and desires they can satisfy, and how much they can invest in meeting those needs.

Whatever we call them, setting and communicating clear aims and measuring progress are essential to effective planning.

But sometimes, it's hard to see the wood for the trees, surrounded as we are by multiple sources of data, stakeholder reporting requirements – which can be at odds with our internal ones – and overlapping plans and policies which all include targets for audiences and public engagement. Here are some top tips to help you out of the woods.

Top tips for setting and monitoring audience-related goals

1. Link your targets to your mission and strategic aims
2. Prioritise: only count what really matters to the strategy
3. Define success, then find the data to describe it (don't start with the data)
4. Make sure your audience plans and targets are integrated into your overall business plan
5. Targets set for funders should be determined by your strategy and not the other way round
6. Less is more: choose the right number of metrics for your organisation, that can be tracked and communicated within resources
7. Use secondary data or recycled information wherever possible; collecting primary data should be the last resort

Top tips for setting metrics

This list of measurables is far from exhaustive but suggests some examples in useful areas. We will be adding more tools, examples and reports to help:

Reach

- Ideally this is measured in terms of visitors, rather than visits
- Number of people or household reached within your catchment area
- Demographic breakdown of your audience, relative to local demographics
- New audiences attending, new audiences returning

Quality

- Repeat attendance/ frequency of engagement
- Churn
- Customer satisfaction ratings
- Feedback collected consistently over time

Income

- Sales targets broken down by the most useful unit for your strategy – e.g. by week and show rather than by day
- Secondary Spend: café, shop etc.

Return on investment

- Ticket/ Secondary income divided by marketing spend
- Income/ visitors per £1 of subsidy or other investment
- Economic impact (using tailored tool)

Target groups and segments

- Increases in engagement by specific groups (it is important to establish that those within a group have a genuinely shared need of your organisation – e.g. families have common and specific needs - cultural, age, interest, local area)
- Increases in engagement/ income from identified market segments

Online and social media

- Number of followers / subscribers
- Engagement and sentiment tracking
- Increases in engagement by specific audience groups

Indirect

- Number and type of people reached through your partners and collaborators; this kind of information may be particularly useful to organisations who present their work

Other public impacts

- Learning, community resource, extent to which valued in local community, profile and media presence

3.2 Benchmarking in practice

An introduction to benchmarking

In this article, we look at what benchmarking is, why it could support your own organisation, and how you could go about it; we'll also look at the sources of data available to you

What is benchmarking and comparative data analysis?

A means of measuring the relative performance of an organisation, by using an agreed set of definitions or criteria across the comparison set. For example, a simple form of benchmarking would be the league table of individual countries' tally of Olympic medals: the agreed definitions here are the gold, silver and bronze medals. The agreed definitions ensure we are comparing apples to apples – vital if the comparison is to be meaningful!

Examples of comparisons already being used in the arts include Arts Council England using elements of the annual submission in individual discussions with its National Portfolio Organisations (NPOs) on topics such as income diversification. Indeed, any time discussions about 'best practice' move from the use of prose to the use of figures, they are shifting into a benchmarking scenario.

Benchmarking requires the existence of robust data, and so tends to follow work establishing common measurement criteria and processes.

It is particularly emerging in:

- Audience activity
- Business models, income diversification and cost management

- The social impact of public funding

Why is it useful?

Benchmarking data is useful to all arts organisations to both inform strategic decision-making, and to contextualise and highlight achievements when reporting to funders and stakeholders.

Benchmarking helps you define what ‘good’ and ‘best’ mean in a particular field of activity so that you can then work out how you stack up against the ‘best in class’, and make informed decisions about what improvements are needed.

Not benchmarking can be risky, and have real-world consequences. For example, many cultural organisations have recently increased their focus on developing income from private donations. Whilst this type of income certainly has a role to play, a lack of comparison data means some have over-estimated the income that donations might contribute to budget sheets – essentially forecasting donation income based on the gap it needs to fill, rather than what data suggests is realistic.

Such optimism is dangerous when the future of an organisation is at stake. Pragmatic realism based on good research into the likely successes of different income generating options is preferable!

Internally – for strategic decision-making

Just how different would your senior management team and board meetings be if instead of saying ‘we need to do something about raising donations and sponsorship’ you could start with ‘the average percentage of income achieved from trusts and foundations for an organization of our size, sector and profile is X% of turnover. We are currently achieving Y% from these sources - can we discuss how we get from Y to X in the next 1-2 years?’.

The latter feels far more confident, more focused and more in control of the factors that are affecting the success or failure of the organisation. This is the crux of the matter.

Benchmarking your organisation helps you to become clearer, not just about what your strengths and weaknesses are, but the scale of these strengths and weaknesses and thus the size of the mountain to be climbed.

This helps you prioritise your activities better as you have a quantitative understanding of the difference between make-or-break activities versus nice-to-haves.

Benchmarking and comparative data will help you:

- Develop a quantitative understanding of your strengths and weaknesses (versus your peers)
- Identify areas where improvement is needed and clearly define the scale of the change you wish to make
- Inform effective plans to diversify income, manage costs and develop audiences
- Set goals based on progress towards ‘best in class’.

Externally - for messaging to stakeholders

One way to think of the role of benchmarking when talking to people outside your organisation is to think of it as a way to underline your key messages. In the main, data is not a substitute for fine prose but it does help drive a message home. How much stronger would your message be if instead of saying that you’ve been growing the income you achieve from royalties, you could say that whilst the national average for arts organisations when it comes to income from intellectual property is 1% of turnover you are already achieving 2% and it is set to continue to grow.

This sort of message that communicates your successes is great for communicating with funders both public and private. Such soundbites can be reproduced by funders in their own reports and are very memorable when communicated verbally in presentations etc.

If you rely heavily on a cohort of volunteers then using comparative data to focus their attention on something like, raising income from the café, or increasing the number of people who buy the ticket that includes the donation, is a useful approach. It works because you can show a before and after and therefore the volunteers can see the impact of their actions and can measure the successes more easily.

For some individuals data is the preferred way to receive information. For example, from individuals located in finance departments with less direct access to the arts from the Treasury at a national level through to the finance departments of Local Authorities. These are individuals who are used to interpreting figures to reach their conclusions and find this easier than reading prose explanations. It is therefore very useful to be able to communicate both in prose and in figures – treat it as if you are speaking two different languages and choosing your language depending on who the other party is.

In summary, benchmarking can be used with stakeholders in the following ways:

- Communicating your achievements
- Making stronger funding applications
- Galvanizing volunteers and members around key issues/challenges

The importance of benchmarking against a peer group

It matters who you compare yourself to. If you are running a visual arts organisation that doesn't have a public space it is unlikely to be wildly useful to compare yourself to Tate as the differences will vastly outweigh the similarities.

Having said that, there may also be times when you are in an aspirational mood and you decide that a comparison against a group of organisations who are already doing something that you aspire to will be more useful.

So how do you choose who to compare yourself to?

It is worth thinking about who you consider your peers to be. You are aiming for a list of 10-20 organisations who are roughly similar to you in what they do, how big they are, whether they are located in an urban or rural setting and whether they are in London or not. Think of this as your 'home group'.

So whilst you may well be interested in the national average, it is just as important that you know how the average for your 'home group' varies. For example, a paper published by **Common Practice titled Size Matters** looks at the differences between the business models of large and small visual arts organisations and takes a cohort of nine small to medium sized London organisations as its 'home group'.

Who is using it, and what are the trends in using benchmark data going forward?

Benchmarking is nothing new, many museums and clusters of larger theatres have been doing it for years. What is new however is the ease with which such comparisons can now be made and the focus from key funders on using this data to inform funding decisions and report on the impact of their programmes.

Creative Scotland have been revising their annual data submission form to enable greater access to their data going forward. The work has looked at not only what data is

collected but also how it might be made accessible whilst protecting the sensitivity and confidentiality of the data held.

Both Paul Hamlyn and Esmée Fairbairn foundations have been improving their evaluation approaches to enable them to report in more detail. Paul Hamlyn have published *Assessing Impact* on the social impact of their programmes.

Plus, of course, here at The Audience Agency we have been facilitating benchmarking of audience data for several years through our Networks programme.

How can you start benchmarking now?

You'll need to answer three key questions:

- What comparisons would be the most useful to your organisation?
- What data do you have to hand?
- What data can you get hold of to compare yourself against?

What should you consider benchmarking?

You do need to know how your business model stacks up vs your peers, you also need to know how you compare when it comes to your largest sources of income and audiences. On that basis we recommend benchmarking your business model first in order to set a baseline for a more detailed comparison of your key income sources, and your on and offline audiences.

If you have specific plans for either a cost cutting exercise or a new income stream add this to your benchmarking shopping list.

You may want to look at some key ratios:

1. Equity ratio – this is the reserves as a percentage of total revenue income and thus an indicator of the resilience of the organisation as a whole
2. Revenue concentration – how dependent are you on one or two core funders?
What is the highest percentage of income from a single source?
3. Administrative cost ratio – this is the overheads as a percentage of total revenue
4. Profit margin – this is the surplus or profit as a percentage of total revenue income

5. Robust revenue model – the percentage of total income that is classified as ‘earned income’ i.e. non-grant income
6. Intangible assets – is there anything for this line in your balance sheet? What percentage of your net assets or net current assets is it?
7. Asset utilisation – the ratio of fixed assets to total income

It should be noted that this list of key ratios is in line with the recommendations of a number of industry specialists including CIDA Co., Mission, Models, Money and Counterculture.

What data of your own do you need to get going?

Now you need to locate your organisation’s data. There is a fair chance that you will already have one or more of the following:

- End of year report and accounts
- Arts Council (England, Wales, Ireland) or Creative Scotland annual submission data
- Audience and or box office data
- Online and social media data

It is worth working out what period to look at. For accounts information annual data is the place to start but you might want to look at monthly or quarterly data for audiences.

What data is out there that you can use to compare yourself to?

You can either join in with existing benchmarking groups or services or collate your own. If you are new to this, it is probably easier and quicker to join an existing service or group. The two main benchmarking services available across the UK are those provided by The Audience Agency (for audience comparisons) and MyCake's Culture Benchmark (for business models). Don't feel obliged to use these however, feel free to build your own comparisons.

Other sources could include:

Data Source	Use
Campaign for the Arts	National headlines on key indicators
Charity Commission	Report & accounts information on thousands of arts non-profits

ACE NPO statistics (or the equivalent for Scotland, Northern Ireland and Wales)	Headlines for financial, governance and audience comparison but mostly national totals not per organisation stats
Sector publications	• Guardian Culture Professionals • Arts Professional • Guardian Culture Professionals Data Visualisation • Guardian Culture Professionals Arts Festivals • Guardian Culture Professionals Data Mining

What benefits are accruing to organisations who benchmark?

- Goal setting (e.g. income development, cost cutting) becomes more pragmatic and realistic as it is informed by better data.
- Greater clarity within the organisation on how business models in the arts tend to change as the turnover increases or decreases
- More detailed understanding of how the ‘best in class’ achieve their successes
- Access to a succinct, fact-based summary of the organisations greatest strengths and weaknesses
- Greater familiarity within the senior management team of the key ratios and comparison points for the organisation and more regular checking of progress
- Greater visibility with and respect from funders

Which key funders are interested in benchmark data and how can you lobby them to open up the data they have collected?

Whilst there is a growing interest in benchmarking amongst the national funders of Arts Council England, Creative Scotland, Arts Council Wales and Arts Council NI, it is really the private trusts and foundations who are leading the way, particularly those whose interests extend across not just the arts but other parts of the third sector.

The Paul Hamlyn Foundation and Esmée Fairbairn Foundation have started to look at how the impact of the organisations they fund can be measured and benchmarked. The PHF publication *Assessing Impact* gives a good indication of the future interests and direction of this funder and can be expected to set the tone for many other funders over

the next few years. Meanwhile DCMS is keen for public funders to make their data more accessible and publicly available.

Data Comparisons

What is a base and how do you choose one?

Gathering audience data usually requires a certain amount of effort. To benefit from that effort, audience data has to be useful. To be useful, data has to be interpreted or given meaning, so one way of giving data meaning is to place it in context by comparing it to another set of data. Data comparison is common in many industries and sectors. A familiar example can be seen in the pharmaceutical sector and their use of the placebo – one set of people trial a new drug, another set of people are given a placebo and these two sets of people are compared.

The comparison of audience to population is a fundamental one that can be used to interpret audience data. This helps to identify particular groups who are more inclined to engage as audiences, as well as those who are the least disposed to do so (these are seen in the data as those who are over-represented in an audience profile compared with the market population (i.e. more likely to attend), and those who are under-represented (i.e. less likely to engage with an organisation, venue or event)).

Defining a population

To use population data, it's helpful to identify a specific population by defining the area in which that population lives. There are a handful of ways to easily define a geography - by country, local authority area, drive-time from a venue or site of an event, or by plotting the audience's geographical reach (or, "footprint") to create a bespoke catchment area.

Each of these methods has its own particular advantages and weaknesses, but their common aim is to compare the audience profile to that of the population living within the most relevant particular catchment area, however it has been defined.

For example:

- When drive time or distance is used – the proportion of the audience that is drawn from within, say, a 30 minute drive-time of a venue or event can be understood. This not only helps to demonstrate a venue or event's geographical "reach", but also enables comparison with the profile of the overall population that lives within the same defined area.

- Alternatively, postcodes from audience data might be mapped, so that a catchment area in which a high proportion of the audience live (a “core” audience) may be defined. In this example, postal sectors are ranked according to the number of audience members that live in them, and then an area is defined by plotting the top-ranking postal sectors that, when combined, contain a certain percentage of the total audience (this can often, typically be 75% of the total audience). In this way, the audience profile can be compared very specifically against the total population of the geographical area which most particularly reflects the current reach of the venue or event.

What is a base?

Whichever way audiences are compared to a population, the term commonly used to describe the population is ‘**base**’. Comparing audiences with a different base has a number of predictable impacts on the interpretative power of that comparison.

A comparison of audiences to a **national base** – the population of England, for example. This comparison is a broad-brush one that might be best used to compare venues doing similar work in different parts of the country. Such a comparison will hide significant local differences in population. If the local population varies from national averages, then comparison of audiences to a national base may well make an audience appear more distinctive than it really is.

A comparison of audiences to a **local base** – the population within a local district authority area, for example. This comparison is one that might be best used to compare venues in different parts of a county. Such a comparison will hide significant local differences in population. If the local population varies from county averages, then comparison of audiences to a local authority base will make an audience appear more distinctive than it really is. However, district authorities may well value this sort of analysis, as it helps them to see which sections of their resident population are engaging with, or being served by, the particular venues or events.

A comparison of audiences to a **catchment** – the area in which 75% of audiences live, for example. This comparison is one that might be best used to understand engagement at the venue level. Such a comparison will align with local differences in population. This is a powerful comparison at venue level, showing the audience strengths and weaknesses based on the current offer most effectively, but is less easy to use when looking at understanding engagement in the cultural offer of a particular place, county or nation.

An introduction to indexes

This explains how indexes are useful in allowing us to compare data against a baseline average.

An index figure is commonly included in Population Profile Reports (PPRs) and in geo-demographic profiles. Indexes are a useful way for us to compare a specific group of people (often bookers) to a larger set of the population, the people from a local or regional area for example.

This article explains how indexes have been used to compare the relationship between the same subsets or segments, (in this case Audience Spectrum segments) of two different populations, (in this case a cluster of arts organisation's bookers and their catchment population) relative to the overall relationship between the two different populations. The indexes help us see the different dynamics between each of the different segments compared with the overall relationship between bookers and catchment population.

The table shows a fictional Audience Spectrum profile based on an Audience Finder geographic cluster. The table compares bookers in the cluster with the population of the wider catchment area.

An index value of 100 indicates that a result exactly matches the baseline average. The baseline average is the overall relationship between the bookers and catchment area population. The index shows how that relationship differs, compared to the overall base, for people in each different Audience Spectrum group. An index of 200 shows that the result is twice the average, and an index of 50 that it is half the average. Broadly speaking, an index of less than 90 or more than 110 would be considered different enough from the average to take notice of.

Audience Spectrum Segment (adults 15+)	Bookers Count	Bookers %	Catchment Area Count	Catchment Area %	Index
Metroculturals	304	1%	96	0%	4,805
Commuterland Culturebuffs	7,398	13%	75,821	9%	148
Experience Seekers	2,673	5%	18,336	2%	221
Dormitory Dependables	14,732	27%	154,721	19%	144
Trips & Treats	13,472	25%	216,072	26%	95
Home & Heritage	5,621	10%	72,897	9%	117

Audience Spectrum Segment (adults 15+)	Bookers Count	Bookers %	Catchment Area Count	Catchment Area %	Index
Up Our Street	3,625	7%	92,205	11%	60
Frontline Families	5,392	10%	153,862	18%	53
Kaleidoscope Creativity	1,421	3%	39,191	5%	55
Supported Communities	983	2%	45,373	5%	33
Unclassified	283			0	
Total count	54,972	100%	834,168	100%	100

Over-represented groups

In the table, 27% of bookers in the cluster belong to the Audience Spectrum group Dormitory Dependables. However, only 19% of all the people who live in the catchment area belong to this segment. This result illustrates that the Dormitory Dependables group are over-represented in the cluster's bookers compared to the catchment area population. The index figure allows us to understand this in more detail. So, an index of 144 means that people from Dormitory Dependables are 44% more likely to engage than the population of the catchment area as a whole.

Average groups

25% of bookers belong to the Audience Spectrum group Trips and Treats, but 26% of people living in the catchment area belong to the Trips and Treats group. This tells us that the proportion of the Trips and Treats segment in the cluster and the proportion of Trips and Treats living in the catchment area is broadly the same. An index of 95 means that the cluster booker's group is just 5% less likely to contain Trips and Treats people than a random sample of the catchment area population.

Under-represented Groups

10% of bookers belong to the Audience Spectrum group Frontline Families. However, 18% of all the people who live in the catchment area belong to this group. Frontline Families are under-represented in the cluster's audience compared to the catchment area population. An index of 55 means that the cluster group is 45% less likely to contain Frontline Families people than a random sample of the catchment area population.

4. Data analysis and presentation

4.1 Presenting data

Using evidence for advocacy

Key issues to consider when turning data into evidence for advocacy.

In the same way data can be converted into intelligence to be applied to decision-making or planning, it can be used to create evidence, to demonstrate the range of impacts an organisation or an activity delivers. To be truly effective in advocacy this evidence needs to have a specific purpose and be targeted to address the needs of stakeholders, supporters, policy-makers or politicians. The format of that data and evidence and the method of its delivery is equally important to ensure successful advocacy.

Be clear about your purpose

Advocacy actions are most usually directed at decision makers who hold the power, often to implement a change in policy or law. Advocacy can also be about changing public opinion to support an issue or cause, or take a specific form of action to put pressure on decision makers or actively demonstrate support.

When planning for advocacy be clear about which of these changes you wish to make, and with which bodies or individuals, in order to collect and present the right evidence. Saying ‘we’re good for our local area’ may be accurate but is not helpful in changing opinions. More specific statements that address local concerns or agendas and that are robustly substantiated can be more useful. For instance:

- Demonstrating an organisation’s social, economic or artistic impact.
- Showing how you contribute to place-making, regeneration or neighbourhood renewal plans.
- How your activity is improving literacy at Key Stage 2, employability of 16-18 year olds or technical skills for those working in your sector.

Much of the data, evaluation and qualitative feedback you already capture can probably be applied to these purposes but it will need careful selection (think pithy statements not lengthy reports) and to show its source (often best as footnotes). Data gathering solutions will need to be put in place for impacts you cannot automatically evidence. This broad, public education style of advocacy could take the form of an annual report

for stakeholders, a page on your website for audiences or a presentation to local councillors.

Human stories work well to illustrate a particular impact but most funders or politicians will also require the statistical evidence behind this and to be assured it is robust and credible. The best ‘making the case’ evidence is often that which combines the personal and the universal, quantitative and qualitative data, to tell a rounded and compelling story as succinctly as possible. Third-party testimony is also important to provide external validation whether peer assessment of artistic quality, visitor feedback on service or local business support. And think of evidence as transmittable: to the point, easy to digest and shareable; for instance the infographic, the killer stat or the compelling personal testimony uploaded to YouTube.

Stakeholders and funders require monitoring of their investment but they also want to hear of success. ‘Make friends not demands’ is a good guiding principle here. Treating them as partners - involving them appropriately from collection through to dissemination – will serve your advocacy well. Advocacy becomes more compelling and can have a greater reach when it is delivered by others on your behalf. But it needs to start with strong data collection systems in place that are reviewed regularly to ensure they are still meeting your stakeholders’ changing needs and your evolving messages.



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