Assessing Visitor Experience at the Charles Dickens Museum

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Abstract

The purpose of this project was to develop systematic, yet relatively simple methods to collect and analyse demographic data, impact data, and marketing data for the Charles Dickens Museum in London, UK. The project group designed methods to collect data through a General Survey, a Socio-Economic Interview, a Comments Book, and *Aztec Services*, the program used at the Museum's till. Additionally, the project group created *Microsoft Access* and *Microsoft Excel* files to analyse the data collected.

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Executive Summary

The Charles Dickens Museum in London, UK, is a small museum located in a house Dickens lived in from 1837 to 1839. In 2010, the Museum acquired the adjacent building and added a café and a small garden. In 2012, the Museum and Dickens enthusiasts will be celebrating Charles Dickens' 200th birthday. The Dickens bicentenary has inspired a large project named "Great Expectations." This project includes utilizing both buildings as part of the Museum, adding new educational opportunities such as creative writing classes, creating more office space for staff, improving accessibility for all visitors, and many other projects.

In order to complete every aspect of Great Expectations successfully, the Museum is applying for a grant from the Heritage Lottery Fund (HLF). Part of the application process for a grant involves collecting visitor data, so the HLF can acquire an insight into who visits the Charles Dickens Museum. Additionally, the HLF expects visitor data one year after the Museum receives the grant that reflects how the Museum has used the grant. Specifically, the HLF will want to know if the Museum's visitor demographics have changed, as well as if visitors appreciate the changes and additions to the Museum because of the Great Expectations project.

Our goal was to develop systematic, rigorous, yet relatively simple and low-cost methods to collect and analyse basic data from visitors of the Charles Dickens Museum that could be sustained through 2012. We soon broke basic data into three categories: demographic data, impact data, and marketing data. Demographic data includes age, gender, ethnicity, etc. Impact data questions ask visitors about their experience at the Museum. Marketing data is any information that will help the Museum with advertisement. While in London, we developed processes to collect and analyse data from all three categories, some in multiple ways.

For years, the Dickens Museum has had a Comments Book for visitors to write their name, address, and any comments they have about the Museum. The collection process is very simple. The book is left on a desk and visitors can write as much or as little as they please. To analyse this data, a staff member will write a monthly report, recording trends seen in the Comments Book, as well as recording the most positive and negative comments.

In addition to the Comments Book, the Museum has used the register, commonly known as the till, to collect information on visitor attendance for years. To add to this process, we are

recommending that the staff member working the till asks one visitor per hour, where they are from and their party size. This data will be collected on a simple *Microsoft Excel* file that the staff member can complete at the till.

In the past, the Museum has distributed surveys to visitors for about a month at a time, once every few years. This does not satisfy the requirements of the HLF. We created a General Survey that will collect all the demographic data, aside from socio-economic data, that the HLF requires. This survey will also collect impact data and marketing data, alternating between the two every week. The data from these surveys will be processed on a *Microsoft Access* file and analysed on a *Microsoft Excel* spreadsheet.

Determining visitors' socio-economic statuses is a fairly complicated process. The HLF has eight categories and the only way to determine which category visitors fall in is to ask multiple questions, some of which are open-ended. We determined the best way to collect socio-economic data is for a staff member to hold short interviews with visitors. The analysis process for socio-economic data includes multiple matrices and a large list of categories that different job titles fall under.

To aid in the process of analysing how well the Museum completed the goals of Great Expectations, we created a Great Expectations Outcomes spreadsheet, using *Microsoft Excel,* which helps organise data on different activities, different audiences, and how well each of the Museum's intended goals for each project was attained for each audience. This spreadsheet will help the Museum both organise its goals for the Great Expectations project and analyse how well it reached these goals.

To conclude, we created multiple processes for the Charles Dickens Museum to collect and analyse visitors' demographic data, impact data, and marketing data. These methods are practical for the Museum staff to collect data continuously and comply with HLF standards. In the future, they will be able to use the Great Expectations Outcomes spreadsheet to analyse how well they accomplished their project goals. With these tools, the Museum will be able to complete one of the requirements for an HLF grant and will hopefully be able to put Great Expectations into motion

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Chapter 1. Introduction

The Charles Dickens Museum opened in 1925 and is located in the only existing London home of the writer. Although small, it has a lot to offer. Despite Dickens being one of London's most famous authors, many people know little about him. Fortunately, the Museum gives Dickens enthusiasts the opportunity to learn in a more informal manner, about the life, the home, and the works of this literary figure.

The Charles Dickens Museum, like many museums, wants to adapt to the technological and interactive learning styles of twenty-first century visitors. In order to ensure they adjust accordingly, the staff sponsored a project to assess its current visitors' experiences. The city of London, and the Museum itself, attracts people of all ages from countries all over the world; therefore, it is especially important to retrieve feedback from these visitors. Our job was to determine the best methods of obtaining and analysing this data.

In 2010, a major expansion effort was launched and the Museum will be adding an adjacent building for more rooms for exhibits and other purposes. Two years later, in 2012, London will be hosting the Summer Olympic Games, and concurrently celebrating Charles Dickens' 200th birthday. The combination of these three events makes the spring and summer of 2010 a critical time for planning at the Dickens Museum. In preparation for the likely influx of visitors to the Charles Dickens Museum in 2012, the Museum has launched its Great Expectations project, which includes adding new education opportunities such as creative writing classes, creating more office space for staff, improving accessibility for all visitors, and many other projects. One of the first steps toward completing the Great Expectations project is to collect basic visitor data, including visitor demographic data, impact data, and marketing data. These data will be used in the strategic planning for exhibits, programs, fund-raising events, and grant proposals. Unfortunately, the Charles Dickens Museum is a museum with limited resources. They do not have the time or resources to facilitate focus groups or give extensive surveys to visitors and spend additional time analyzing the data.

The goal of our project was to design the best strategy to acquire the information the Museum seeks. In accordance with our research, we divided these methodological tools to learning visitors' feedback into two main categories: surveys and interviews. From here, we

evaluated which approach was best for generating a particular range of data. For instance, a short survey will be effective for telling the Museum staff what postal code visitors are from, but a short survey will not tell the staff how to arrange a certain display. Here, multiple interviews may be more useful.

This project will help the staff at the Charles Dickens Museum determine who is visiting their museum, whether or not they are enjoying their experience at the Museum, and how they think the Museum can improve. This information will help the Museum twofold: these data will suggest physical improvements as well as give concrete justifications for the allocation of funds from grants toward those improvements. With a new building addition, the Dickens' bicentenary, and the Summer Olympic Games approaching, this is the best time for the Charles Dickens Museum to learn what visitors have to say to make the Museum as user-friendly and as satisfying an experience as possible. We believe our research yielded productive results that will help the Museum towards its overall goal of completing the Great Expectations project.

Chapter 2. Literature Review

Our mission was to develop systematic, rigorous, yet relatively simple and low-cost methods to collect and analyse basic data, such as demographic data, impact data, and marketing data from visitors of the Charles Dickens Museum. We determined which methods are best to elicit the data the Museum needs. We created a process with which these data collection methods can be sustained through 2012. To prepare for our project with the Charles Dickens Museum, our group first began researching the general history of Charles Dickens and the Charles Dickens Museum. Next, we reviewed the present and future plans of the Dickens Museum. Once we understood Dickens and the Museum, we spent a significant amount of time researching different data collection methods, most specifically surveys and interviews.

2.1 History of the Museum

The Dickens Fellowship was founded in 1902, as a club of scholars and individuals with an interest in Charles Dickens' work. The Charles Dickens Museum was opened by the Dickens Fellowship in 1925, at 48 Doughty St, London, England. While living in the house, Dickens finished three major literary works and worked on another. This was the home of Dickens and his family from 1837 to 1839. In the early 20th century, when the building was threatened with demolition, the Fellowship took the opportunity to assemble one of the largest collections of items that relate to Charles Dickens in the world.

The Museum has fourteen rooms on four floors, including the basement. All the exhibits in the house either comprise original artifacts from when Charles Dickens lived there, or are from the same time period and were purchased by the Museum to resemble what his house looked like when he lived there. Although many of the exhibits are biographical, some of the exhibits are of Dickens' work, or pertinent to topics discussed in his work, including exhibits on other artists that influenced or were influenced by Charles Dickens.

The small size of the Museum limits the options for the placement of different data collection methods. For instance, the till is a convenient place to collect data because a staff member is always present; however, a visitor may not feel comfortable answering some questions with a staff member in the room. Martin Wyatt, Deputy Director of the Handel House Museum, suggested that we set aside an area away from any staff members that allows visitors complete privacy to answer any questions, such as socio-economic or suggested improvement

questions, that may be more uncomfortable to answer honestly than simple demographical questions such as age and gender. We created a process that will both make the visitors aware of the surveys and give them the necessary privacy.

As mentioned previously, the Charles Dickens Museum is initiating some changes and upgrades. The Museum recently acquired the adjacent building as part of an expansion. Furthermore, in 2012, the Museum will host a multitude of events for Charles Dickens' 200th birthday and London will be hosting the Summer Olympics. The Museum must take full advantage of this critical time in its history by ensuring its visitors are entertained, interested, and intrigued enough to return. One part of taking advantage of these events will be to better understand who their visitors are. Visitor data on experiences and suggested improvements will be more helpful for these Dickens bicentenary events than demographic information; however, demographic data is required by the Heritage Lottery Fund for grant applications. The Museum will analyse the data collected now and apply it to their 2012 events to better the experience for visitors. We created data analysis methods to ensure these improvements are possible.

2.2 Visitor Data Collection

Collecting visitor satisfaction data is one way the Charles Dickens Museum can fully understand how to make its visitors' experiences as educational, interesting, and enjoyable as possible. The process of successfully collecting this data includes selecting a data collecting method, designing a process that eliminates error while still retrieving the data needed, and implementing that method correctly. In order to ensure that we receive the data we need, we evaluated many data collection strategies.

Our processes primarily focused on two methods of data collection: surveys and interviews. Within each category are many subcategories; however, we can generalize the advantages and limitations of each category. Paper surveys are generally useful for quantifiable information such as how often someone visits museums a year or where the visitors live. Interviews can give the staff less quantifiable information such as suggested improvements or level of satisfaction. To select the correct data collection method, there are many factors to consider. One question to ask the researchers is "What type of data are we looking for and why?" If the researchers desire quantitative data for a grant, the Museum should consider a survey. However, if the researchers want detailed descriptions of ideas for improving an exhibit, the

Museum should focus more on interviews. In addition to determining what type of data is desired, the Museum must decide how complex the questions need to be to elicit the correct data. For instance, if the researchers need data for the previously-mentioned grant, the questions should be simple and straightforward in order to extract data that can be easily analysed. Conversely, to understand visitors' experiences and their ideas for improvement, a broader, more discussion-oriented set of questions would be a better fit (Salant & Dillman, 1994).

Another factor involved in the method selection process is the availability of resources. It is vital to understand the limitations of the Charles Dickens Museum and the time constraints of the project. Specifically, mail surveys would not be effective due to a combination of the time necessary to send and receive complete mail surveys and the price of stamps and stationary. In addition to monetary and time constraints, factors such as labor and available facilities and technology affect which methods will be most practical and effective (Doyle, 2001).

While time constraints of the staff are important, time limitations affect the visitors as well. Many visitors may be willing to fill out short, fill-in-the-blank questionnaires; whereas, fewer visitors may be willing to take part in an interview. If the Museum wants a great majority of its visitors to answer questions, the short questionnaire may be more effective. If the Museum wants visitors to think critically but is not concerned with a great number of participants, conducting multiple short interviews may be the better choice.

There are many factors, including ones that were not mentioned above, that indicate which data collection methods best serve the researcher. The most important step, however, is to understand each collection method fully. The first of these methods that we discuss is survey.

2.2.1 Surveys

Surveys are the most well known and, generally, the easiest method of collecting information from visitors. Surveys are easy to distribute and typically collect quantitative data. We can use surveys to collect a specific set of questions that extract simple answers. Because surveys can reach out to many visitors, the data collected from surveys can usually be generalized and taken as the consensus opinion. There are many different kinds of surveys, but we proposed that the Museum use paper surveys.

Our survey design includes multiple-choice questions, open-ended questions, or both. The less professional a survey looks, the less seriously the visitor will answer the questions. It is important to give concise instructions on these surveys so it is clear to the visitor what is being

asked. In terms of the questions, they should be arranged in a logical, chronological (if applicable) order. If there is a change in theme of questions, there should be some kind of heading or statement notifying the visitor of this change. Once the data is collected, it can be easily stored in a *Microsoft Excel* file or another similar program. Essentially, the surveyor should arrange the survey with no biases against or assumptions about the visitors (Salant & Dillman, 1994; Leung, 2001).

While surveys are an excellent way to collect concrete, quantitative data, surveys also have limitations and should never take the place of the judgment of professionals. Surveys tell the researcher what percentage of a population has a certain opinion and show a correlation between two things, but surveys can never prove causation. Additionally, the environment in which the visitors are taking the survey will surely affect their answers. Studies have shown, for example, that if the staff member who delivers the surveys to the visitors is rude and intimidating, the visitors will most likely answer the questionnaire differently than if the staff member was kind and polite. Surveys are a very useful strategy for collecting visitor data in the Dickens Museum (Doyle, 2001).

2.2.2 Interviews

The next data collection category we evaluated is an interesting choice because it can collect both quantitative and qualitative data. Similar to surveys, standardized interviews have very specific questions that are to be read in a specific order to extract simple, straightforward answers. Conversely, in-depth qualitative interviews are more casual and the interviewers have the option to adjust the questions as they see fit per visitor. Though different, both these interview styles have the inherent characteristics of an interview. In both instances, the interviewer is the leader of the discussion and the visitors have voices of their own, as opposed to multiple-choice surveys in which the visitors only have a select number of options.

During standardized interviews, the interviewers essentially have a script to read. These interviews are more personal than a survey and can give the visitors the trust to answer more fully and honestly than they might on a survey. The responses are simple and straight-forward. Assuming the interviewers follow the script, there should be minimal bias in standardized interviews. Of course, it is nearly impossible to eliminate all bias, because something as simple as the interviewer's tone could change a responder's answer to a question. Due to the minimal bias in these interviews, the data collected from them can be generalized and used to represent all

visitors. Other than time, there is very little cost involved in standardized interviews. The Museum will utilize standardized interviews to elicit some visitor data, more specifically socio-economic data (Doyle, 2001).

Unlike standardized interviews, in-depth qualitative interviews allow the interviewer and the subject freedom throughout the interview. While the first few questions may be standard questions, such as demographics, as the interview progresses, the staff members may adjust, remove, or add questions according to their judgment. These adjustments should be an attempt to make the visitors feel more comfortable. The more comfortable the visitors are, the more open and truthful they will be in answering questions. These questions can be much more open-ended and conversational than those of a standardized interview and give the responder the opportunity to explain experiences and ideas to the staff member. In-depth qualitative interviews are very useful for questions involving exhibits or the Museum as a whole. These interviews take more time to give and more time to evaluate than a survey or standardized interview and they cannot be generalized due to the flexibility of the questions and interviewer. However, the data these interviews extract from visitors is rich and detailed and could never be gained from a quantitative data collection method (Doyle, 2001; Holstein & Gubrium, 1995).

No matter the type of interview, every interviewer should follow the same simple guidelines. It is the interviewer's responsibility to make sure that every visitor's response is complete. If this is not the case, the interviewer must creatively find a way to make the visitor clarify or elaborate without influencing the visitor's response. Once visitors give their complete responses, these responses should be recorded exactly as they are stated without interviewer discretion or alteration. This honesty is essential to understanding exactly what the visitor is suggesting. The simple change of a few words can change the tone, and therefore meaning, of any response. In addition to correctly recording answers, interviewers must ensure that they do not show any emotion to an answer that may influence the visitor. If the interviewer appears upset with an answer, the responders may adjust their responses later in the interview to please the staff member. The goal of an interview is never to get the answers the staff wants. The goal is to find the truth (Holstein & Gubrium, 1995).

Both standardized interviews and in-depth qualitative interviews will be useful tools in assessing visitors' experiences at the Charles Dickens Museum. Although they can be time consuming, interviews elicit vital information in terms of museum exhibits and visitors' personal

experiences that will be very helpful in preparation for the Great Expectations project. With qualitative data that expresses the visitors' opinions, the Museum will be able to adjust the 2012 affairs to better suit the visitors.

2.3 Literature Review Conclusion

The Charles Dickens Museum is home to one of the largest collection of Dickens material in the world. Due to the predicted influx of visitors in the near future, it is vital that the Museum obtain greater knowledge about its visitors. Data collection methods, such as surveys and interviews, along with effective analysis of the data will allow the Dickens Museum staff to improve the Museum on multiple levels. The staff will learn both quantitative visitor data, such as demographics, and qualitative visitor data, such as suggested improvements. The staff will then be able to use this data to request grants from funds to adjust the Museum according to their findings.

Chapter 3. Methodology

We have identified a step-by-step set of objectives that we completed in order to meet the goals of this project. First, we determined which data the Charles Dickens Museum is interested in collecting from its visitors. We also reviewed previous visitor data findings and data collection methods the Museum has used in the past. We contacted other museums to learn which data collection methods they have used in the past were successful and which methods were not helpful. We determined the capacity of the Museum staff to distribute surveys and conduct interviews, as well as their ability to collect and analyse the data they will receive. We created processes for collecting and analysing demographic data, impact data, and marketing data. We created a process for analysing data for specific events in 2012. Ultimately, our team used the findings from these efforts to produce a guide, which is be a descriptive manual giving step-by-step directions how to correctly collect and analyse visitor data, using the methods and programs we created. Each of these objectives has a methodical process to assist us in completing this project.

3.1 Determine Data Wanted

Our first objective in London was to determine what visitor information the Charles Dickens Museum staff seeks. We interviewed museum staff to understand what information they think is most important to improve the Museum. As expected, the staff is interested in visitor demographics such as age, gender, and hometown, impact data, marketing data, and ideas for new or improved exhibits. With this information, we were able to research funds such as the Heritage Lottery Fund (HLF) and Museums, Libraries, and Archives Council (MLA) and use their resources to help us create preliminary data collection and analysis methods.

3.2 Evaluate Previous Methods

We reviewed the data collection methods the Dickens Museum has used in the past. These case studies of the Dickens Museum past processes gave us the best sense as to which methods would be successful. We evaluated previous data collection methods, the data collected, and the tools used to organise and analyse the collected data, dating back to 1995. In every instance, the Museum created a short survey to collect demographic data, impact data, and marketing data. Unfortunately, these surveys were only distributed over a one or two month period. Additionally, there was no process for analysis other than counting the data and

calculating the percent of each response. Each survey did have a helpful and informative report that summarized the data and explained if there were any outside factors that affected the data. For example, more females (73%) responded to one of the surveys because the staff member noted that typically when he asked a couple to complete a survey, the female would complete the survey.

We used some of the questions from these previous surveys in our current survey and after reading the reports, we decided not to use some other questions. For instance, one question was, "Can you remember how you first got to know about Dickens's work?" This question seems helpful but did not receive a high level of responses. It seems possible that most people don't remember when they learned about Charles Dickens because he is the kind of author you "just know."

3.3 Evaluate Other Museums' Methods

We have contacted local museums, such as Dr. Johnson's House and the Handel House, that are similar to the Dickens Museum because they are similarly sized, are dedicated to an author, or both. We sent emails to contacts at multiple museums before our arrival in London. We found that this email was typically disregarded by the staff. Next, we visited these museums unannounced. At some museums, we were able to meet with a staff member who was knowledgeable in the Museum's visitor assessment and at others we were able to get contact information. We held multiple meetings with different museums' staff and learned a lot of valuable information such as what collection methods worked and did not work in the past as well as how each museum stored and analysed their data. These meetings both helped us adjust the Dickens Museum's surveys and gave us multiple *Microsoft Excel* sheets to use as templates for our data analysis processes. (For more information on our meetings with other museums, see *Chapter 4. Findings*).

To organize the contact information of the other museums' staff members that we met with and each museum's visitor data collection and analysis processes, we created Contact Sheets for each museum. See *Appendix F* to see these Contact Sheets.

3.4 Analyse the Staff's Ability to Coordinate Data Collection

The final step in deciding which data collection methods we used was to understand the feasibility of the staff's ability to coordinate every step of the data collection and analysing

process without our assistance. For instance, we do not expect the staff to have the time, interest, or expertise to conduct many in-depth qualitative interviews, but we do think most staff members will be able to distribute and evaluate surveys and possibly standardized interviews. To get a better understanding of the work a staff member does, we spent time working the till. This experience helped us understand the feasibility of collecting payment for a ticket, printing a receipt, and asking for the visitor to fill out a survey. After meeting with the staff and working the till, we determined that the best method to elicit visitor data will be our General Survey and the Comments Book. Additionally, we propose that the staff ask visitors where they are from and their party size at the till and a few select staff members conduct short interviews to collect visitors' socio-economic status.

3.5 Create Manual for Future Use

Once we determined the best processes to collecting and analyzing visitors' demographic data, impact data, and marketing data, we created a manual for the staff to use in the future. This manual is a guide for staff to explain very clearly how to collect and analyse visitor data. The manual does not include explanations of why each step is necessary; however, all of our recommendations are backed up by either research or interviews. The Dickens Museum staff members will not need to be experts on data collection, but they will need to understand the important details and concepts of each method they will be implementing.

We worked very closely with multiple members of the Dickens Museum Staff to ensure it is user-friendly to the staff. We also used our final presentation as a short tutorial to teach the staff members who are directly involved in assessing visitor data how exactly we expect them to collect and analyse visitor data.

3.6 Methodology Conclusion

While in London, we met with our sponsors at the Charles Dickens Museum to better understand the previous efforts and their future goals for effective visitor assessment. We met with local museums to better understand how other similar institutes assess their visitors' experiences. These case studies gave us real examples of what does and what does not help us successfully learn about the Museum visitors. We used these interviews to gather justifications for the specific data collection methods we implemented to meet the Museum's goals. We also analysed the capacity the Museum staff to conduct and analyse surveys or interviews. In the final

week of our project, we completed a manual that explicitly explains how to create and distribute the collection methods we created as well as how to organise and analyse the findings and gave a short presentation explaining the manual.

Chapter 4. Findings

Throughout our time in London, we acquired knowledge on general methods for data collection and analysis as well as knowledge on how to collect and analyse specific visitor data such as demographic data, impact data, and marketing data. We obtained this information through meeting with staff members of many museums in London and researching articles on data collection and analysis.

4.1 Data Collection

Most of our research was focused on either demographic data, impact data, or marketing data. However, we found that some rules and guidelines are applicable to more than one of these categories of data. For instance, because our survey includes questions that collect data from all three categories, there is a process for determining the order of questions and for alternating questions. These processes will be important for all surveys the Museum conducts.

4.1.1 Order of Questions

When creating a survey, the order of questions needs to be logical and clear for the reader to understand. Some of surveys include only demographic questions or only impact questions. Here, the order of the questions is not as crucial. However, if the survey has demographic questions as well as impact questions, the order is important. Linda Skippings, curator of the Carlyle House, told us that she preferred to place impact questions at the top of her surveys, with demographic questions at the bottom. Her theory is that visitors will be enthusiastic enough at the beginning of the survey to want to express their true feelings about the Museum and once they reach the demographic questions they will not mind just ticking boxes. Essentially, the "work" of filling out a survey gets easier as the visitors continue down the page.

The problem with placing impact data questions at the top of a survey is that it may deter the visitors from even picking up the survey. Stephanie Pickford, curator of Dr. Johnson's House, said she structures surveys with the demographic questions at the top and the impact questions, which require more time and effort, on the bottom. Gemma Colgan, of the Foundling Museum, structures their surveys similarly, putting the marketing questions, which ask for visitors' email addresses, at the end of the survey. These surveys seem to look more appealing to

pick up. Essentially, the idea is that once someone has taken the time to tick all the demographic questions, they will most likely continue and answer the more difficult impact questions.

Because we were receiving logical ideas from both schools of thought on this subject, we decided to poll 50 Dickens Museum visitors. We showed them two surveys. About half of each survey had demographic questions and about half had impact questions. One survey had the impact questions on top and one had impact questions on the bottom. After polling the visitors, we determined that they were more likely to complete a survey that had demographic questions on top and impact questions on the bottom because 38 out of 50 (75%) visitors polled chose that survey. Some visitors explained themselves, saying that it was more natural to begin with simple questions.

4.1.2 Alternating Surveys

The Museum has a need for demographic data, impact data, and marketing data. Aside from socio-economic questions, which will be collected separately, the Museum will collect all demographic data required by the Heritage Lottery Fund (HLF) through a survey. The Museum will also use this survey as a method to collect impact data and marketing data. Because there are too many questions to fit on one sheet of paper, the Museum must rotate between impact questions and marketing questions.

We created a bank of recommended impact questions and another of recommended marketing questions that we have gathered from surveys distributed by other museums, surveys distributed at the Dickens Museum in the past, and questions that different staff members of the Museum want answered. From these banks, we worked with multiple Dickens Museum staff members to select the questions they want answered. We created one General Survey with impact data questions and two General Surveys with marketing data questions. The Museum will alternate between impact data questions and marketing data questions every Wednesday evening after the Museum has closed. By alternating in the middle of the week, the Museum will be able to collect both impact and marketing data on weeks that may be different than others, such as the week-long vacation of a local school.

4.2 Demographic Data

Demographics data includes visitors' age, gender, ethnicity, and socio-economic status, as well as other categories. Demographic data is quantitative data that the Museum will collect and analyse with *Microsoft Access* and *Microsoft Excel*. These data will give both the HLF and the Charles Dickens Museum some insight as to who is visiting the Museum.

During our time in London, we discussed demographic data with the Charles Dickens Museum staff and the staff of other museums. We discussed the wording and distribution of the survey as well as the best methods to collect and analyse that demographic data. In these meetings, we determined that we could collect all the necessary demographic data, except for socio-economic data, by using a General Survey. Additionally, in order to collect more visitor data, some information will be collected at the till.

4.2.1 Wording of Questions

Upon first reading the Dickens Museum's previous survey, we were confused by some of the wording. The norms of a survey are different in the United States than they are in England. For instance, on the previous survey, one of the options for ethnicity was "Asian (Bangladeshi, Indian, Pakistani, other)" and the next option is "Asian (Chinese)." Our initial reaction was to change these options. In the U.S., this would not be considered "politically correct" and would certainly not appear on a survey. However, after doing some research we learned that in England, these are accepted categories. The categories above are also the same categories the HLF expects the Dickens Museum to organise its data into before submitting the data.

In addition to learning some norms of surveys in England, in our meeting with Gemma Colgan of the Foundling Museum, Gemma brought up adding statements such as, "Do omit this question if you prefer" on some questions that may be considered invasive. For instance, some visitors may consider a question on disability or ethnicity too personal to answer. To avoid this problem, we added "Do omit this if you prefer" to the more invasive questions. Additionally, Stefanie van Gemert, a volunteer at the Dickens Museum, has given definitions of ethnic category and disability on the survey.

Finally, the previous survey had a question "Where do you live?" with the options "Abroad," "the UK" and "Greater London," in that order, as responses. Unfortunately, this was

causing some issues because some visitors would tick "the UK," then cross it out and tick "Greater London." Because of this confusion, we discussed this issue in our meeting with Pickford. She agreed that it followed logical order to arrange the options "Greater London," "the UK," and then "Abroad," in that order. She has arranged Dr. Johnson's House's previous surveys in this manner. After this meeting, we decided to reverse the order to resemble the Dr. Johnson's House survey.

Essentially, part of our work with demographic surveys involved simply determining the most logical way to present these questions, while still conforming to a format that was familiar to citizens of the UK and matched the format the HLF requested. (To see the General Surveys, see *Appendix B, Appendix C, and Appendix D*.)

4.2.2 General Survey- Demographic Data

The demographic part of the General Survey that the Museum will distribute will ask visitors for their age, gender, ethnic category, whether or not they have visited the Museum before, where they live, and if they consider themselves disabled. This survey will be distributed at the till and visitors will have the option to complete it at a table in the café or at the desk in the dining room. The dining room will have a desk with a drawer for the visitors to place the survey. By distributing the survey face-to-face, the staff will be able to answer any questions a visitor may have. However, by allowing the visitors the option of sitting down privately to complete the survey, we expect more honest answers. This factor of privacy becomes more apparent when collecting impact data, but it is also important for those who may be sensitive to some demographic questions.

Once visitors have placed the surveys in the desk drawer, the surveys will be collected and the data will all be input into a *Microsoft Access* file. The goal of this file is to make inputting the data as simple and straight-forward as possible, while still allowing *Microsoft Excel* to do a lot of calculations and to create graphs to represent the data. This will allow for any staff member or volunteer to input the data, but, with the use of a password, only select staff members will be able to see the processed and analysed data. For more specific details on the Museum's methodology for collecting and analyzing data, see *Appendix A*.

4.2.3 Data Collection at the Till

The program the Charles Dickens Museum uses to sell tickets at the register, or till, collects how many different items have been sold, whether it be a museum ticket or an item in the shop. Previously, the Museum categorised the tickets into three categories: child, adult, and concessions. Here, concessions could mean a student, a senior, or a disabled visitor. Additionally, there was no way to keep track of any members of organizations, such as the Dickens Fellowship, who have free admission. While this worked well for quickly selecting a button to determine the price of visitors' tickets, some slight adjustments could have greatly increased data collection at the Museum.

Currently, the till program has a separate button for child, student, adult, senior, disabled visitor, and every other concession or free admission option. Although this may add a little more confusion for staff when visitors buy tickets, it will allow the Museum to collect data on every visitor in the Museum. This data will not be as specific as the data collected by the demographics survey, but it will complement it well.

We propose that the staff members at the till ask where visitors are from and their party size. The demographic surveys ask visitors who live in "Greater London" to state their postal code, visitors who live in "the UK" to state their county, and visitors from "Abroad" for their country. Because working at the till can get hectic, we understand that asking for more than just country could be unrealistic. Asking for party size should be simple and most likely the staff member will know how large the party is due to the amount of tickets the visitors buy. This data will be collected on a *Microsoft Excel* file. Like the data collected from ticket sales, this data will represent many more visitors than the survey, despite being less specific. *Figure 1* is an excerpt of the *Microsoft Excel* spreadsheet that the staff will use to collect what countries visitors are from. The spreadsheet to collect party size is very similar and is on another sheet within the same file.

Responses:	France	Germany	Italy	UK	USA
Day 1, 10AM					
Day 1, 11AM					
Day 1, 12PM					
Day 1, 1PM					
Day 1, 2PM					
Day 1, 3PM					
Day 1, 4PM					

Figure 1: Till. This is an excerpt from the *Microsoft Excel* spreadsheet where staff members at the till record what countries visitors are from.

For specifics on exactly how the Museum will collect and analyse this data, refer to our Visitor Assessment Manual in *Appendix A*.

4.2.4 Collecting Socio-Economic Data

Visitors' socio-economic statuses include many factors. There are eight categories that the HLF considers: higher managerial and professional occupations, lower managerial and professional occupations, intermediate occupations, small employers and own account workers, lower supervisory and technical occupations, semi-routine occupations, routine occupations, and long-term unemployment. These eight do not include student, which is considered "not classified." Unlike the other demographic categories, which require one or two multiple-choice questions, in order to for the Museum to categorise visitors' socio-economic statuses correctly, visitors must answer multiple questions, some of which are open-ended questions that need to be interpreted by a staff member.

In January and February 2010, the Museum distributed surveys similar to our General Surveys that asked socio-economic data questions. When analysing these surveys, we found that a large majority of visitors did not all four socio-economic questions. Unfortunately, due to the nature of categorising socio-economic statuses, if visitors do not answer all four questions, they cannot be categorised. We propose that a staff member conduct short interviews with visitors to determine their socio-economic status. Because the Socio-Economic Interview (which can be found in *Appendix E*) asks multiple choice and open-ended questions, the interviewer must use skills designated for both standardized interviews and in-depth qualitative interviews (For more

information on standardized interviews, see *2.2.2 Interviews*). This will include plugging visitors' answers into multiple matrices as well as matching the visitors' open-ended responses with the many options available. This entire process is explained in full in *Appendix A*.

4.3 Impact Data

Impact data is qualitative data that expresses how visitors felt during their visit. It may include suggested improvements or a change in a visitor's attitudes or values. This data will also be collected in *Microsoft Excel* files, but these files will involve more work and analysis than the quantitative demographic data. Through our research and meetings with various museum staff members, we learned a lot about the effect privacy can have on collecting impact data from visitors and determined that we should collect impact data through a Comments Book, as well as surveys, while still being open to other creative options.

4.3.1 Privacy

Depending on the type of question, where visitors complete surveys can drastically change their responses. Martin Wyatt, Deputy Director of the Handel House Museum, stressed the importance of creating a private, comfortable environment for visitors to answer impact questions, as well as any demographic questions that could be considered invasive. Wyatt's theory was if a survey asks a visitor a question such as, "Did you find your experience to be a positive one?" and a staff member is in the room, a visitor will surely respond differently than he would have if he was alone. The purpose of impact questions is not to learn how great the Dickens Museum is; rather, impact questions look to gain an understanding of what parts of the Museum visitors truly appreciate and what parts of the Museum they think need improvement.

In order to create a private, comfortable environment for visitors, the staff will recommend visitors complete their surveys either in the café, or at the desk in the dining room, which has been designated as a room for visitor assessment. The dining room also holds the Comments Book, which is another place the Museum will be able to collect impact data. These relaxed environments will allow visitors the necessary privacy to complete a survey truthfully or write in a Comments Book without the fear that a staff member will look at what they wrote immediately after the visitors leave the Museum.

4.3.2 General Survey- Impact Data

As mentioned above, the Museum's General Survey will collect primarily demographic data, but also will collect impact data every other week. We created General Survey A, which includes the standard demographic data questions along with five impact data statements. Visitors are asked to choose a number 1 to 5 expressing to what degree they agree or disagee with the five statements. (To see General Survey A, see *Appendix B*) These questions will be placed on the bottom of the survey, because of the polling we conducted on visitors. (For more information on the polling, see section *4.1.1 Order of Questions*.) Once visitors have completed these surveys, their responses will be collected in a *Microsoft Excel* spreadsheet, based on a spreadsheet created by the Museums, Libraries, and Archives Council (MLA). For the specific step-by-step process for collecting and analysing impact data from the General Surveys, see *Appendix A*.

4.3.3 Comments Book

Aside from the General Surveys, the Museum uses a Comments Book to collect impact data from visitors. The Comments Book will rest in the dining room which has been designated as a room for visitor assessment. In the book, there are columns for a visitor's name, address, and comments. The name and address column are more for the visitors than the Museum. We found that visitors view the Comments Book as part of the visit; whereas, in contrast, a survey is closer to work than part of a visitor's experience. Some visitors choose to draw pictures or even comment on other visitors' remarks. It is an interesting dynamic.

In order to analyse the data in the Comments Book, we propose that monthly a staff member does an assessment of the Comments Book. This assessment will include reading all the comments that were entered in that month. The staff member will write a small report recording the trends of the comments and quoting some of the more positive and more negative comments. This report will also explain the steps that Museum is taking to continue improving based on the remarks made in the Comments Book. For a more explicit explanation on the Comments Book assessment, see the Visitor Assessment Manual in *Appendix A*.

4.4 Marketing Data

Marketing data includes how visitors first learned of Charles Dickens or the Charles Dickens Museum, visitors' normal mode of transportation, visitors' e-mail addresses, and any data that could help the Museum better reach its audience through advertising. As stated above, the Museum collects this data every other week on the Museum's General Surveys B and C (*Appendix C* and *Appendix D*). Once visitors have completed the General Surveys, marketing data will be stored in a very simple *Microsoft Excel* file. To learn more about the process for collecting and analyzing marketing data, see the Visitor Assessment Manual (*Appendix A*).

4.5 Great Expectations Outcomes Spreadsheet

The previously mentioned data collection and analysis methods ask specific questions to every visitor in the Museum. These methods are sufficient at this time, but in the future when the Museum expands, holds more temporary exhibits, and holds school workshops, it needs a process to collect and analyse data specific to these different activities and specific to different kinds of audiences (i.e. students, Dickens Fellowship members, disabled visitors, etc.).

To solve this problem, we used a monitoring and evaluation toolkit from the UK Film Council Digital Film Archive Fund (DFAF) as a template. The DFAF created a spreadsheet on *Microsoft Excel* with multiple tabs that analyses data collected from different audiences. These spreadsheets collect data based on the intended outcomes the Museum wants different audiences to experience. Figure 4 is an excerpt from the Great Expectations Outcomes spreadsheet. The Museum determines whether or not each outcome was met by asking one to five questions per outcome. Once data is collected and entered into the spreadsheet, the Museum staff is able to look through the Outcomes Spreadsheet and determine how many of their intended goals were met. The Museum will be able to determine which events met which goals better and which audience was the most pleased with different events. For specific details on how the Great Expectation Outcomes Spreadsheet works and how the Museum will collect and analyse this data, see *Appendix A*.

OUTCOMES	QUESTIONS	ANSWER OPTIONS	TOTAL auto sum	Museum Visit	Oliver Twist Exhibit	Creative Writing Classes
Improve understanding of the life and works of Dickens	Did you learn something new today about Charles Dickens?	Yes	47	8	18	21
		No	21	3	15	3
	Will you read a Charles Dickens book in the future?	Yes	46	7	19	20
		No	14	2	7	5
	Do you intend to return to the Museum?	Yes	44	12	13	19
		No	15	5	3	7

Figure 4: Great Expectations Outcomes spreadsheet. This is an excerpt from the *Microsoft Excel* spreadsheet where staff members record data related to specific events and specific audiences.

4.6 Findings Conclusion

Throughout our time in London we conducted a lot of research and held meetings with multiple museums' staff members to learn about the best way to collect and analyse visitor data. Some of the museum staff members we interviewed gave us suggestions such as giving visitors the privacy necessary to complete a survey that requested personal or intrusive information. Others explained the methods their museum used to collect and analyse visitor data collected through surveys or comments books. We determined that to collect both impact data and marketing data on our General Surveys, we needed to make multiple General Surveys and alternate which ones the Museum distributes weekly. There is one survey with impact data, General Survey A, and two with marketing data, General Survey B and General Survey C. These surveys will be alternated in an ABAC manner. This pattern will continue throughout. In addition to the General Surveys, we determined that the Comments Book was collecting data that was not being utilised. To amend this problem, we propose that a staff member completes a monthly assessment of the Comments Book to ensure every comment is being read and taken into consideration. Ultimately, we took this information into account and created a process for collecting and analysing demographic data, impact data, and marketing data that is practical for the Charles Dickens Museum.

Chapter 5. Conclusion

In the fourteen weeks we spent working on this visitor assessment project, we researched the Charles Dickens Museum and many ways of collecting and analysing visitor data. We met with many staff members of the Dickens Museum and multiple local Museums to learn about previous data collection and analysis strategies. With this knowledge, we created a General Survey that collects demographic data, impact data, and marketing data. We created a Socio-Economic Interview to collect socio-economic data from visitors because we found that visitors were not completing these questions correctly on surveys. Data collected from the General Surveys and Socio-Economic Interviews will be part of an application to the Heritage Lottery Fund (HLF) for a large grant for the Great Expectations project. In addition to data for the HLF, we created a process where the Museum collects data at the till. The Museum collects basic age data from every visitor through the *Aztec* till program. The staff also asks the first visitor to enter after the hour for the country he is from and his party size. Finally, the Museum will complete a short monthly assessment of the comments written in the Comments Book.

Aside from the Comments Book, each of these data collection processes has a *Microsoft Access* or *Microsoft Excel* file to process and organise the data for easy analysis by staff members. The General Surveys use *Microsoft Access* which exports data into *Microsoft Excel*. The Socio-Economic Interviews require a few tables to categorise a visitor into a socio-economic status and those statuses will be collected in a *Microsoft Excel* file. All data collected at the Till will also by collected into a *Microsoft Excel* file and once a month the data from that month will be collected and entered into a Master Till spreadsheet. All these processes have been tested and are simple, yet they collect and process all necessary visitor data to be analysed.

Overall, we created visitor data collection and analysis processes for demographic data, impact data, and marketing data. These processes are, at this point, the most fit for the Dickens Museum, but will hopefully propel the Museum into even better, more extensive data collection processes in the future.

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Visitor Assessment Manual
for the Charles Dickens Museum
June 2010

Barrett Duff

Dan Sullivan

Table of Contents

Chapter 1. Introduction

This Visitor Assessment Manual was created in June 2010 in an effort to create the Charles Dickens Museum's first sustainable processes to collect and analyse visitor data. These processes were meant to be systematic, yet relatively simple and low-cost. The project's main focus was on demographic data, impact data, and marketing data. The following chapters are broken up by type of data (demographic, impact, and marketing), a chapter for future processes the Museum may choose to utilise, and a conclusion. Some data collection methods overlap and collect multiple types of data. In this case, the method is thoroughly explained in each corresponding chapter. However, the analysis process varies for different types of data, even if only one method is used. For instance, there is a different method for analysing the demographic data and the impact data that both come from the same General Survey.

This manual includes explicit instructions how to collect and analyse visitor data using the General Survey, the Socio-Economic Interview, the till, and the Comments Book. There are three General Surveys, which all collect the same demographic data as well as either impact data or marketing data. General Survey A collects impact data. General Survey B and C collect marketing data, but have different marketing data questions. The General Surveys, which all visitors will be encouraged to complete, will alternate between collecting impact data and marketing data. The Socio-Economic Interview is standard and will only need to be completed two to three times per week. The data collected at the till will be collected hourly. The Comments Book will collect data by resting on a desk in the Dining Room. It will be assessed monthly.

This manual was created to give step-by-step directions for staff members helping in the visitor assessment project. The instructions have been written assuming that a staff member will be completing all of the steps. This manual will not, however, explain why a particular process is done in a certain way or manner in an effort to simplify the manual. These explanations can be found in *Chapter 4. Findings* in the *Assessing Visitor Experience at the Charles Dickens Museum* report, also completed in June 2010.

If there are any additional questions, the Museum Director has the contact information of the authors.

Chapter 2. Demographic Data

The demographic data the Museum collects are age, gender, whether or not the visitor has been to the Museum before, where the visitor lives, ethnic category, whether or not the visitor is disabled, and socio-economic status. Some of these may be considered marketing data, but for the simplicity of this manual, they will be classified as demographic data. This data will be collected in three manners: from the General Surveys (A, B and C), from the till, and from Socio-Economic Interviews.

2.1 General Survey- Demographic Data

There are three different General Surveys, but each one collects the same demographic data. The General Survey that collects impact data is called General Survey A. The General Surveys that collect marketing data are called General Survey B and General Survey C. For information on the difference between different General Surveys, see either *3.1 General Surveys- Impact Data* or *Chapter 4. Marketing Data.* These surveys are distributed, the data are collected, and the data are analysed.

Distribution:

- One type of General Survey (either A, B, or C) is distributed to visitors for a week at a time. They are switched on Wednesday evenings after the Museum has closed or Thursday mornings before the Museum has opened.
- The General Surveys alternate in an ABAC pattern continuously.
- The General Surveys rest at the till or on a table near the till. Ask visitors to complete these surveys upon their entrance.
- Encourage visitors to sit at the desk in the Dining Room or in the café while completing the General Survey

Collection:
- At the end of every day, collect every General Survey that has been completed, staple them together, and write the date on the top survey.
- Open the *Microsoft Access* file named "General Survey," under the tab "Demographic Survey."

- Before entering data, enter your name, the date, and the amount of surveys you have entered into the *Access* file into the Log Book.

- To submit the data that visitors have entered, tick the corresponding boxes on the "Demographic Survey" tab.

- Enter the date the General Survey was completed in the top right-hand corner.

- Once all the data for one survey has been entered, click "Save and New" on the bottom of the page.

- To enter data for more than one General Survey, after clicking "Save and New," the responses will reset and you will be able to enter the data from the next survey.

- Once you have submitted the data, save the file by clicking the "Save" button on the top left-hand corner of the screen.

- Keep in mind that this process is only the process for submitting the demographic data. To submit impact data see *3.1 General Survey- Impact Data*. To submit marketing data see *Chapter 4. Marketing Data*.

Analysis:

- Open the *Microsoft Access* file "General Survey."

- Select "Response List" under the tab "Forms" on the left-hand side of the page.

- Click "Export."

- Exit the "General Survey" *Access* file.

- Open the "Exported Demographic Data" *Microsoft Excel* file. This file will have the data categorised by month, year, total, and percent for the past 12 months, which is what the HLF asks for. This data includes all demographic information collected from the General Survey, except the fill-in answers under the question "Where do you live?"

- To find a list of the fill-in answer under the question "Where do you live?" Open the *Microsoft Access* file "General Survey" and "Demographic Residence" under the "Tables" tab on the left-hand side of the page.

2.2 Till

Three different sets of data are collected at the till throughout every day: basic age data, country, and party size. Some of this data could be considered as marketing data, but for simplicity, it is categorized as demographic data in this manual.

Collection:

- When a visitor purchases a ticket to the Museum, choose which category (child, student, adult, senior, Dickens Fellowship, etc.) the visitor represents. Notice that because the Museum has concessions for members of different trusts or funds, the *Aztec* program will not always collect a visitor's age.
- Ask the first visitor to purchase a ticket after every hour the Museum is open (10:00AM, 11:00AM, 12:00PM, 1:00PM, 2:00PM, 3:00PM, and 4:00PM) where the visitor is from and his/her party size.
- Enter this data into the "Country" and "Party Size" sheets of the Till *Microsoft Excel* spreadsheet that corresponds to the current date. For instance, on 25 June at 12pm, if a visitor from the UK comes with one friend, open the "Till July 2010" file, mark an "X" in the "Day 25, 12PM" row and in the "UK" column in the "Country" sheet. Then mark an "X" in the "Day 25, 12PM" row and in the "2" column, in the "Party Size" sheet.
- Notice that France, Germany, Italy, UK, and USA are the first countries on the top row. After those five, the countries are in alphabetical order. If the country the visitor is from is not on the list, write that country under its continent. For example, if someone from Ghana visits the Museum, write "Ghana" in the Africa column.
- Monthly, these *Excel* sheets will be completed. Copy and paste the totals at the bottom of the "Country" and "Party Size" into the "Till Master Spreadsheet" next to the corresponding month and year. If there are any numbers under the continents, someone from a country not specified came to the Museum. Write this country on the "Till Master Spreadsheet" under the appropriate continent.
- Collect the data stored by *Aztec* (number of children, adults, etc.) for the month and add the data to the "Till Master Spreadsheet."
- Save the completed month's file.

- Copy and paste the "Till Template" file into a new *Excel* file named "Till" with the correct month and year (i.e. "Till August 2010").

Analysis:
- Open the "Till Master Spreadsheet."
- The "Country," "Party Size," and "Basic Age" data will be categorized by month, year, and total under their corresponding sheets.

2.3 Socio-Economic Interview

Due to the difficulty in gathering socio-economic data, this information will be collected two to three times per week through short interviews.

Collection:
- While holding the Socio-Economic Interview, approach a visitor and ask the visitor if he/she would not mind answering a few socio-economic questions to help the Museum with its application for a grant.
- If the visitor is retired, please complete the questions using the information from his/her most recent job.
- If the visitor has been unemployed for a long time or has never worked, he/she does not need to answer any of the following questions. He/she will be classified as "Never worked and long-term unemployed."
- Students do not need to fill this out because they are "Not classified" according to the HLF.
- Ask the visitor question 1. If the visitor answers "employee," go to question 2 and skip questions 3. If the visitor answers "self-employed," skip question 2 and go to question 3.
- Once the visitor answers either question 2 or questions 3, continue on to questions 4, 5, and 6.
- A visitor's "Code" (either Code 1, Code 2, Code 3, or Code 4) can be determined from the visitor's answers to question 1 and question 2 or question1 and question 3. See the Table on the Socio-Economic Interview for details. (For example, if the visitor is an employee and a supervisor, he/she is Code 3)

- A visitor's Standard Occupational Classification (SOC) can be determined from the visitor's answers to questions 4, 5, and 6. See the "Preliminary SOC" sheet in the *Excel* file "Socio-Economic Data" to determine the first 2 numbers of the visitor's SOC. For instance, a corporate manager would be 11.

- Next, open the "Secondary SOC" sheet and scroll down, using the same first two numbers to find the visitor's "SOC Unit Group." For instance, the same corporate manager who is a senior official in a local government would be classified as 1113.

- On the same "Secondary SOC" sheet, find the cell that corresponds to the "SOC Unit Group" you chose and the Code that you chose. For instance, the same Code 3, 1113 visitor would be "Grouping Number" 1.1.

- Open the sheet "Socio-Economic Groups" and find the group that matches the "Grouping Number" you chose last step. For instance, the visitor with "Grouping Number" 1.1 would be categorised "Higher managerial and professional occupations."

- Open the "Socio-Economic Grouping Data" sheet and mark an "X" in the appropriate cell.

- Once per year, copy and paste the entire "Socio-Economic Grouping Data Template" sheet into a new sheet.

Analysis:

- Open the *Excel* file "Socio-Economic Data" and open the sheet "Socio-Economic Grouping Data." This sheet will have the data organised by totals and percents at the bottom.

Chapter 3. Impact Data

3.1 General Survey- Impact Data

There are three different General Surveys, but each one collects the same demographic data. The General Survey that collects impact data is called General Survey A. The General Surveys that collect marketing data are called General Survey B and General Survey C. For information on the difference between different General Surveys, see *Chapter 4. Marketing Data.* These surveys are distributed, the data are collected, and the data are analysed.

Distribution:

- One type of General Survey (either A, B, or C) is distributed to visitors for a week at a time. They are switched on Wednesday evenings after the Museum has closed or Thursday mornings before the Museum has opened.
- The General Surveys alternate in an ABAC pattern continuously.
- The General Surveys rest at the till or on a table near the till. Ask visitors to complete these surveys upon their entrance.
- Encourage visitors to sit in the Dining Room at the desk or in the café while completing the General Survey

Collection:

- At the end of every day, collect every General Survey that has been completed, staple them together, and write the date on the top survey.
- Open the *Microsoft Access* file "General Survey."
- When entering data, enter your name, the date, and the amount of surveys you have entered into the *Access* file into the Log Book.
- If the survey the visitor completed has the statement "My visit was very interesting" continue here. If not, move on the *Chapter 4. Marketing Data*.
- Open the tab "Impact and Marketing" under "Forms."
- Tick the numbers that correspond to the numbers chosen by the visitor.
- Click "Save and New" in the bottom right-hand corner. This will reset the form.

- To enter data for more than one General Survey, after clicking "Save and New," the responses will reset and you will be able to enter the data from the next survey.

- Once you have submitted the data, save the file by clicking the "Save" button on the top left-hand corner of the screen.

- Keep in mind that this process is only the process for submitting the impact data. To submit demographic data see *2.1 General Survey- Demographic Data*. To submit marketing data see *Chapter 4. Marketing Data*.

Analysis

- Open the *Microsoft Access* file "General Survey."
- Click "Impact Data" under the tab "Queries"
- This data will be collected by month, year, and total.
- To see this data represented by graphs instead of tables, click "View" in the top left-hand corner and click "PivotChart View." To return to tables, click "View" then "PivotTable View."

3.2 Comments Book

The Comments Book will rest in the Dining Room. It has categories labeled as "Name," "Address," and "Comments." There is no collection process for the Comments Book.

Analysis

- Monthly, collect the Comments Book or Books that visitors have written in for that month.
- Read all the comments that were written that month.
- Write a short report explaining the trends you see in the Comments Book. For instance, an exhibit was noted as being specifically interesting or an exhibit was noted as being especially boring.
- Throughout the report, includes quotes from some of the most positive comments and the most negative comments.
- At the end of the report explain what the Museum plans to do to continue the positive comments and better the parts of the Museum that were commented on negatively.

Chapter 4. Marketing Data

There are three different General Surveys, but each one collects the same demographic data. The General Survey that collects impact data is called General Survey A. The General Surveys that collect marketing data are called General Survey B and General Survey C. Although some demographic and marketing data may seem to overlap, for simplicity, the only information this manual will regard as "marketing data" is the last two questions on General Survey B and the final questions on General Survey C.   For information on the difference between different General Surveys, see *3.1 General Surveys- Impact Data.* These surveys are distributed, the data are collected, and the data are analysed.

Distribution:

- One type of General Survey (either A, B, or C) is distributed to visitors for a week at a time. They are switched on Wednesday evenings after the Museum has closed or Thursday mornings before the Museum has opened.
- The General Surveys alternate in an ABAC pattern continuously.
- The General Surveys rest at the till or on a table near the till. Ask visitors to complete these surveys upon their entrance.
- Encourage visitors to sit in the Dining Room at the desk or in the café while completing the General Survey

Collection:
- At the end of every day, collect every General Survey that has been completed, staple them together, and write the date on the top survey.
- Open the *Microsoft Access* file "General Survey."
- Before entering data, enter your name, the date, and the amount of surveys you have entered into the *Access* file into the Log Book.
- If the survey the visitor completed has the question "What is the main purpose of your visit?" or "What types of cultural activities do you… time?" continue here. If not, see *3.1 General Survey- Impact Data.*
- Keep in mind that all three marketing data questions will never be answered on one General Survey

- Open the tab "Impact and Marketing" under "Forms."

- Tick the answers that correspond to the answers chosen by the visitor.

- Click "Save and New" in the bottom right-hand corner. This will reset the form.

- To enter data for more than one General Survey, after clicking "Save and New," the responses will reset and you will be able to enter the data from the next survey.

- Once you have submitted the data, save the file by clicking the "Save" button on the top left-hand corner of the screen.

- Keep in mind that this process is only the process for submitting the marketing data. To submit demographic data see *2.1 General Survey- Demographic Data*. To submit impact data see *3.1 General Survey- Impact Data*.

Analysis

- Open the *Microsoft Access* file "General Survey."

- Click "Marketing Data" under the tab "Queries"

- This data will be collected by month, year and total.

- To see this data represented by graphs instead of tables, click "View" in the top left-hand corner and click "PivotChart View." To return to tables, click "View" then "PivotTable View."

Chapter 5. Great Expectations Outcomes Spreadsheet

The Great Expectations Outcomes spreadsheet is a file that collects visitor data based on the intended outcomes of specific events and for specific audiences. For instance, an outcome for students may be to better their knowledge and understand of the life and works of Dickens. This outcome would have a few questions to ask students to determine whether or not this goal was reached. This data is very easily collected and analysed.

Collection

Because the outcomes and questions corresponding to these outcomes have not been determined yet, we created templates to collect and analyse this data. Once surveys have been distributed and completed, follow these steps:

- Open the "Great Expectations Outcomes" spreadsheet.
- Click the audience you have collected data on, for instance "Students."
- Enter the total number of visitors who answered each question at the specific event in the corresponding cell. For Instance, for the question "Did you learn something new today about Charles Dickens?" 18 visitors at the Oliver Twist Exhibit said "Yes" and 15 visitors at the Oliver Twist Exhibit said "No."
- Continue this process for each necessary audience and event.

Analysis

The Great Expectation Outcomes spreadsheet collects the totals of each response on the same sheet that the data was entered. Open the "Great Expectation Outcomes" spreadsheet and click the sheet you are looking for.

Chapter 6. Conclusion

To review, there are certain things that need to be completed daily, weekly, monthly, and yearly. If these are not completed on time, this may disrupt the process and the analysis programs.

Daily:

- Ask visitors to complete the General Survey
- Ask the first visitor to enter at every hour for the country he/she is from and his/her party size.
- Encourage visitors to write in Comments Book
- At the end of the day, collect all of the General Surveys that were completed that day, staple them together, and write the date on them.

Weekly:

- Interview two or three visitors using the Socio-Economic Interview
- On Wednesday evening/ Thursday morning, switch which General Survey is available to visitors, using the ABAC pattern.

Monthly:

- Collect all the data that has been collected at the till, which includes country, party size, and age data collected by *Aztec*.
- Enter this data into the "Till Master Spreadsheet" with the corresponding month and year.
- Use the "Till Template" to create a new *Excel* spreadsheet for the till.
- Read through the month's comments in the Comments Book. Complete a full assessment of your findings.

Yearly:

- As done for the till data, create a new file for the Socio-Economic Interview data. Copy and paste the file from the "Socio-Economic Data Template" and create a new file for the year.

As mentioned in *Chapter 1. Introduction*, if there are any questions, the Museum Director has the contact information of the authors.

Appendix B: General Survey A (Impact Data)

Please help us and take a minute to complete this anonymous form. Your answers will contribute to our efforts to make the Charles Dickens Museum a welcoming and inspiring place for all. **THANK YOU.**

CHARLES DICKENS MUSEUM

Age _____

Gender ☐ MALE ☐ FEMALE

Have you visited the museum before?
☐ NO
☐ YES

If YES, when was this last visit?
☐ in the last 6 months
☐ in the last year
☐ more than 1 year ago

Where do you live?
☐ Greater London, please state postal code_____
☐ the UK (excluding Greater London), please state county_____
☐ Abroad, please state country_____

Please tick the ethnic category that best represents you, that is, how you see yourself (Your ethnic category is a mixture of culture, religion, skin colour, language and the origins of yourself and your family. It is not the same as nationality.) Do omit this if you prefer.

White
☐ British
☐ Irish
☐ Any other white background, please state_____

Black
☐ Black African
☐ Black Caribbean
☐ Any other black background, please state _____

Chinese
☐ Chinese

Asian
☐ Asian Bangladeshi
☐ Asian Indian
☐ Asian Pakistani
☐ Any other Asian background, please state_____

Mixed ethnic group
☐ Asian & White
☐ Black African & White
☐ Black Caribbean & White
☐ Chinese & White
☐ Any other mixed background, please state_____

☐ Any other background, please state_____

Do you consider yourself to have a disability? (The Disability Discrimination Act, 1995, defines a disability as: "A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities") Do omit this if you prefer.
☐ NO ☐ YES

Please circle a number 1 through 5.

		Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
A	My visit was very interesting	1	2	3	4	5
B	I discovered some new information	1	2	3	4	5
C	I found out how to do some new things	1	2	3	4	5
D	I learnt some things that made me change my mind	1	2	3	4	5
E	I intend to come again	1	2	3	4	5

We would love to hear more! Please do leave more personal feedback about your visitor experience and the museum in **our comments book.**

Figure A1: Charles Dickens Museum's General Survey A (Impact Data)

Appendix C: General Survey B (Marketing Data 1)

Please help us and take a minute to complete this anonymous form. Your answers will contribute to our efforts to make the Charles Dickens Museum a welcoming and inspiring place for all. **THANK YOU.**

CHARLES DICKENS MUSEUM

Age _____

Gender ☐ MALE ☐ FEMALE

Have you visited the museum before?
☐ NO
☐ YES

If YES, when was this last visit?
☐ in the last 6 months
☐ in the last year
☐ more than 1 year ago

Where do you live?
☐ Greater London, please state postal code_____
☐ the UK (excluding Greater London), please state county_____
☐ Abroad, please state country_____

Please tick the ethnic category that best represents you, that is, how you see yourself (Your ethnic category is a mixture of culture, religion, skin colour, language and the origins of yourself and your family. It is not the same as nationality.) Do omit this if you prefer.

White
☐ British
☐ Irish
☐ Any other white background, please state_____

Black
☐ Black African
☐ Black Caribbean
☐ Any other black background, please state_____

Chinese
☐ Chinese

Mixed ethnic group
☐ Asian & White
☐ Black African & White
☐ Black Caribbean & White
☐ Chinese & White
☐ Any other mixed background, please state_____

Asian
☐ Asian Bangladeshi
☐ Asian Indian
☐ Asian Pakistani
☐ Any other Asian background, please state_____

☐ Any other background, please state_____

Do you consider yourself to have a disability? (The Disability Discrimination Act, 1995, defines a disability as: "A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities") Do omit this if you prefer.
☐ NO   ☐ YES

1. What is the main purpose of your visit?
a. See Dickens's house and its collection
b. View the current exhibition
c. Research (or studies)
d. Visit the shop / café
e. Attend an event or meeting at the Museum
f. Other (please state) _____

2. How did you hear about the Charles Dickens Museum?
a. Newspapers / magazines
b. Travel guide
c. Word of mouth
d. Signposts / passing by
e. Internet
f. Promotional guide
g. Other (please state) _____

We would love to hear more! Please do leave more personal feedback about your visitor experience and the museum in **our comments book.**

Figure A2: Charles Dickens Museum's General Survey B (Marketing Data 1)

Appendix D: General Survey C (Marketing Data 2)

Please help us and take a minute to complete this anonymous form. Your answers will contribute to our efforts to make the Charles Dickens Museum a welcoming and inspiring place for all. **THANK YOU.**

CHARLES DICKENS MUSEUM

Age _____
Gender   ☐ MALE   ☐ FEMALE

Have you visited the museum before?
☐ NO
☐ YES

If YES, when was this last visit?
☐ in the last 6 months
☐ in the last year
☐ more than 1 year ago

Where do you live?
☐ Greater London, please state postal code_____
☐ the UK (excluding Greater London), please state county_____
☐ Abroad, please state country_____

Please tick the ethnic category that best represents you, that is, how you see yourself (Your ethnic category is a mixture of culture, religion, skin colour, language and the origins of yourself and your family. It is not the same as nationality.) Do omit this if you prefer.

White
☐ British
☐ Irish
☐ Any other white background, please state_____

Black
☐ Black African
☐ Black Caribbean
☐ Any other black background, please state_____

Chinese
☐ Chinese

Asian
☐ Asian Bangladeshi
☐ Asian Indian
☐ Asian Pakistani
☐ Any other Asian background, please state_____

Mixed ethnic group
☐ Asian & White
☐ Black African & White
☐ Black Caribbean & White
☐ Chinese & White
☐ Any other mixed background, please state_____

☐ Any other background, please state_____

Do you consider yourself to have a disability? (The Disability Discrimination Act, 1995, defines a disability as: "A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out normal day-to-day activities") Do omit this if you prefer.
☐ NO   ☐ YES

What types of cultural activities do you (like to) attend/participate in in your spare time?
(Choose the one activity you are most likely to attend)
a. Special exhibitions (e.g. galleries, photography, paintings)
b. Arts performances (e.g. theatre, musical, dance)
c. Literary events (e.g. readings, interviews with writers, literary debates)
d. Creative workshops or courses (e.g. pottery, etching)
e. Historical events (open lectures, presentations)
f. Family events (at museums, theatre venues, community centres)
g. Other (please specify)_____

We would love to hear more! Please do leave more personal feedback about your visitor experience and the museum in **our comments book.**

Figure A3: Charles Dickens Museum's General Survey C (Marketing Data 2)

Appendix E: Socio-Economic Interview

Socio-Economic Interview

- If the visitor is retired, please complete the questions using the information from his/her most recent job.
- If the visitor has been unemployed for a long time or has never worked, he/she does not need to answer any of the following questions. He/she will be classified as "Never worked and long-term unemployed."
- Students do not need to fill this out because they are "Not classified" according to the HLF.

1) Are you working as an employee or are you self-employed?
   - *a. Employee (go to 2 and skip 3)*
   - *b. Self-employed (skip 2 and go to 3)*

2) In your job, do you have any formal responsibility for supervising the work of other employees?	3) Are you working on your own or do you have employees?
a. Yes	a. On own/with partner(s), but no employees
b. No	b. With employees

After the visitor answers either question 2 or 3, continue to questions 4, 5, and 6.

4) What does the firm/organization you work for mainly make or do?
   OPEN response

5) What is your job title?
   OPEN response

6) What do you mainly do in your job?
   OPEN Response

Question #s:	Answers:	Employment status:
1,3	b,b	Code 1: Employers
1,3	b,a	Code 2: Self-Employed w/ No employees
1,2	a,a	Code 3: Supervisors
1,2	a,b	Code 4: Other Employees

Use the answers to questions 1 and 2 or questions 1 and 3 to determine the visitor's Code (see above table).

Use the answers to questions 4, 5, and 6 to determine the visitor's Standard Occupational Classification (See SOC2000 table).

Use the visitor's Code and Standard Occupational Classification to get a number that corresponds to a socio-economic status (See Socio-Economic Groups).

Figure A4: Charles Dickens Museum's Socio-Economic Interview

Appendix F: Contact Sheets

Carlyle's House

Contact:

Linda Skippings, Curator, linda.skippings@nationaltrust.org.uk

24 Cheyne Row, London SW3 5HL

020 7352 7087

History:

5/14- Visited house; met with Skippings and discussed Carlyle's House's comments book and plans for future surveys

Methods:

The house has a comments book where visitors are not instructed to do anything, but they typically write their name, general location, and some comments.

On surveys that include both multiple choice questions and open-ended questions, Skippings prefers putting the open-ended questions on top because she feels visitors are more likely to be enthusiastic about writing their opinions than ticking boxes; however, once visitors have written their opinions, they will not mind ticking a few boxes.

Comments:

The Carlyle House is very similar to the Dickens Museum in that they are similarly sized and are both houses of authors of the 19th century.

Dr. Johnson's House

Contact:

Stephanie Pickford, Curator, curator@drjohnsonshouse.org

17 Gough Square, London EC4A 3DE

020 7353 3745

History:

5/20- Met with Pickford; received packets of Dr. Johnson's House's data collection and analysis methods and statistics from 2007 and 2009.

Methods:

The house has a comments book where visitors are only asked for "comments". Some visitors still write where they are from. The house has distributed surveys in the past for special events or exhibitions only. Pickford found that the response rates were much higher when business card-sized surveys were distributed rather than A4 sheets of paper.

Comments:

Dr. Johnson's House is similar to the Dickens Museum in size. Dr. Johnson wrote the first English dictionary.

Foundling Museum

Contact:

Gemma Colgan, Communications & Museum Assistant, Gemma@foundlingmuseum.org.uk

40 Brunswick Square, London WC1N 1AZ

020 7841 3600

History:

5/25- Met with Colgan; discussed current data collection and analysis methods and received current survey

Methods:

The museum has a comments book a few rooms away from the till, where visitors are asked to put their name and comments. The museum also has a survey that they distribute to one visitor in the morning and one visitor in the afternoon every day. These surveys ask primarily open-ended questions. A question asking for visitors' email addresses is at the bottom of the survey.

Comments:

The Museum is close the Dickens Museum geographically, but is much larger.

Handel House

Contact:

Martin Wyatt, Deputy Director, mwyatt@handelhouse.org

25 Brook Street, London W1K 4HB

020 7495 1685

History:

5/18- Met with Wyatt; discussed the house's data collection and analysis methods, specifically the role privacy plays how honest a visitor is when completing a survey

Methods:

The Handel House has a comments book without instructions. Wyatt stressed the importance of allowing levels of privacy that are proportionate to the invasiveness of a question. The house has an effective method of measuring the data they collect with their comments book.

Comments:

The Handle House is another small museum in London like the Dickens Museum. Handel was a composer in the 18th century.