

# Monitoring Audience Diversity

Published by Audiences London

2008

Audiences London developed these Guidelines for building a visitor profile in order to help organisations in their steps to develop a more diverse audience.

These Guidelines are based on a research project carried out by Audiences London, which consulted a range of cultural organisations of all shapes and sizes. The advice here therefore acknowledges that there is no 'one size fits all' methodology for diversity monitoring.

*The Audience Agency is a not-for-profit organisation created out of the merger between All About Audiences and Audiences London Plus in 2012.*





# Monitoring Audience Diversity

## Guidelines for building a visitor profile

Supporting the development of more diverse audiences

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Please note that while AL has gone to reasonable lengths in researching and seeking advice on these Guidelines, we cannot be held legally responsible for the results of their implementation.

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## Section 1: Context

### Introduction

Diversity monitoring is about understanding whether you are serving all sections of society equally, and if not, what you can do about it. Ideally, monitoring is about more than reporting to funders and other stakeholders; it is a process through which you come to see your organisation find out what as others really see you. These Guidelines are based on a research project which consulted a range of cultural organisations of all shapes and sizes, therefore the advice within acknowledges that there is no one size fits all methodology for this process. The guidelines give extensive information on the philosophical and practical aspects of monitoring.

### The Overview

To find out how representative your audience is, you need to collect numbers. If you want to find out *why* groups are more or less represented, you need to collect opinions too. For monitoring to be more than tick-box exercise, you need to do both. For most cultural organisations, the most effective way of doing that is through a questionnaire-based audience survey. The Guidelines offer guidance on doing this meaningfully and using other information in a complementary way.

Many organisations feel that this kind of monitoring is beyond their means. The Guidelines suggest how accurate monitoring can be fitted in to your work manageably, by the simple expedient of doing little but often. Like brushing your teeth – if you only did it once a year, it would take week and not be as effective as a daily routine.

The biggest concern we met is that asking audiences for sensitive personal information (ethnicity, disability etc.) causes offence, especially among under-represented groups. Our research proved over and again that this is not the case provided it is asked for in the right way. The Guidelines give advice on sensitive and ethical data collection,

If your organisation is committed to developing the diversity of audiences, the joined-up approach to monitoring we recommend will make a difference. How you do it will depend on what your organisation wants to achieve. In other words, no one size fits all, which is why the Guidelines explore the philosophy of monitoring alongside practical tools - so that you can develop a plan which is based on the right principles but practically suited to your organisation.

## Some background

Audiences London is frequently asked to provide guidance on monitoring the profile of audiences to support funder-driven diversity and equality plans and other reporting requirements. As there was little applicable guidance, we undertook the research project that forms the basis of these Guidelines with Arts Council England funding. A steering group of cultural organisations and agencies with a particular interest and expertise took part in test research and contributed ideas and suggestions.

Speaking to many in the cultural sector, we discovered that the subject of monitoring and diversity is fraught with anxiety and confusion. While most people acknowledge that monitoring is necessary, views range widely about its real value and what constitutes good practice. Few people we spoke to felt that they were “getting it right” - even fewer organisations were employing the full cycle of activity we propose here. So, the Guidelines are in no sense a minimum standard, but one to work toward.

A key conclusion of the project is that monitoring, when used by a company to evaluate its own practice, is a trigger for real change. Clearly monitoring is also crucial in enabling organisations to report responsibly to a range of external bodies, including funders and other supporters. Combined, such reporting has a role to play in making the case for public support. However, we would strongly advocate developing an approach to monitoring which contributes to organisational learning and development *as well as* yielding indicators useful to other stakeholders. The Guidelines are designed to help you adopt a sensible process of self-review, which can also fulfil funder requirements.

All the funders we spoke to were aware of the pressures on organisations. Arts Council England is currently reviewing its policies on data-collection and reporting. As part of this project, Audiences London was asked to feedback to funders and we have made a number of recommendations that are complementary to the Guidelines.

While Arts Council England has provided funding and encouragement for their development, these Guidelines were produced independently by Audiences London. A draft version has been circulated to a number of expert readers, including ACE officers and legal advisers, and arts practitioners. The Guidelines were developed as a result of a research project with the help of a Steering Group and a range of readers and supporters. For details, please see Background on page 58.

## How to use the Guidelines

The Guidelines' purpose is to offer some pointers to cultural organisations about getting and using sensitive personal information about audiences and other participants, as part of becoming more inclusive. They should help you to monitor audiences in a way that is as useful and meaningful as it is ethical and cost-effective. Practically, they will help you to create and deliver a plan for monitoring over time that will contribute to your capacity to develop the diversity of your audience.

You might find it helpful to read the Guidelines straight through at least once to get the full picture, but we also hope that you will be able to dip in and out for reference.

### Section 1: Context

covers the **principles** involved in monitoring: an explanation of what monitoring is and what it has to do with developing the diversity of your organisation and audience.

### Section 2: Guidelines

moves on to the **practicalities** of how to plan for, collect and use the information itself, including detailed advice about how to ask about different aspects of diversity, and how to ensure that the information you collect is as reliable as possible.

### Section 3: Tools

then gives you the **tools** you'll need to start planning your own monitoring, including a planning document and example questionnaire adapted from those that we have used with other organisations, FAQs, a glossary of terms and further reading.

The Guidelines are a "living document", however, as we expect to update and improve them over time. Please post any **feedback** and suggestions at [www.audienceslondon.org](http://www.audienceslondon.org) and check there for updates.

### Further Support

The Guidelines were devised to help you to develop your own in-house approach, but you might find some additional support with setting up or delivering part of the programme helpful, Audiences London (or the audience development agency for your region) can help.

### A Note on ADUK: A to Z of Data Protocols

Audience Data UK was set up by the UK arts councils to provide a coherent approach to collecting and using audience information. The *A-Z of Commonly Used Terms and Protocols* is particularly relevant to these Guidelines, suggesting how you should collect information so that it is comparable with other data sets (such as the Census, and other cultural sector studies). The full A-Z (246 pages) can be downloaded from [www.aduk.org](http://www.aduk.org), or contact AL for specific advice.

## Working Definitions

### Diversity

is used in the broadest sense to cover considerations of age, gender, ethnicity, cultural background, disability and sexuality. The Guidelines focus on information that helps us to ensure that we are taking steps to include people as equally as possible. That means collecting “sensitive” information about identity, circumstance and lifestyle-choice. We place a particular emphasis on collecting data on ethnicity, but also explore the similar yet distinct issues around disability and sexuality.

### Monitoring

refers to the process of tracking how well an organisation is meeting its objectives, including the collection of evidence. The emphasis here is on the monitoring of *audiences* and the specific market research techniques required. Suggestions as to how information should be presented, to whom and how that influences planning are applicable to the other forms of “monitoring” you might regularly undertake - such as sales information, employment practice, feedback from other stakeholders.

### Audience monitoring and research are not the same thing

Although monitoring in this situation uses common audience research techniques, the terms cannot be used interchangeably. Monitoring is research specifically designed to understand whether an organisation is meeting its objectives - in this case, to be open equally welcoming to all sections of society. Audience research can also be used for a host of other purposes - which monitoring *cannot* fulfil. So bear in mind, a monitoring plan is *not*.

- a way to understand non-attenders or non-users
- a market-test of a new product, service, communication etc
- consultation
- the sole way to profile your existing audience as the basis of a marketing plan
- a way of identifying a potential audience

and these activities will not replace monitoring. There are many ways in which we can now understand audiences - such as tailored quantitative and qualitative research, mapping, geo-demographic profiling. All these methodologies can be used to inform audience strategy, but are not necessarily suitable for monitoring purposes. There are a number of reasons for this, but a key one is that respondents must be able to define their own identity rather than being defined by a researcher or analyst (see 23). That said, a lot of advice in the Guidelines about collecting sensitive information will of course be useful and applicable to other forms of research, and a lot of advice about how to conduct high quality research will help you to understand how to collect information for monitoring (see page 53).

You will also find a full Glossary of terms on page 55.

## Why Monitor Audiences?

There are 2 main reasons why cultural organisations say they monitor the diversity of their audiences:

- To report and provide evidence to funders and other key influencers
- To evaluate audience development plans/ projects

Our research underlined the fact that organisations could be getting much more out of audience-monitoring, enjoying a wider range of benefits. Our main finding was that - like all good research - monitoring becomes useful when planned and designed with a clear purpose in mind. This is the essential ingredient that makes the difference between a process which effects positive change and one that is an expensive and time-consuming chore.

### Good Inclusive Practice

This link between becoming a more diverse and inclusive organisation and collecting information about the profile of service-users is recognised beyond the cultural sector.

*“Without ethnic monitoring, an organisation will never know whether its equal opportunities policy is working. There is a risk that people will just see the policy as paying lip service to racial equality. If this happens, the policy could lose credibility and commitment among the staff who have to deliver it, as well as the people who are affected by it. To have an equality policy without ethnic monitoring is like aiming for good financial management without keeping financial records.”*

- The Commission for Race Equality

Monitoring is generally accepted as good practice for any organisation which intends to develop the diversity of their stakeholders. It is the only objective way of establishing whether or not you are treating and serving all groups equally. If used to its full, it should also show the most effective changes you can make to become more inclusive.

It has wider benefits too. Taking a genuine interest in how well you serve different parts of your community will help to build trust and enhance your reputation as an open and inclusive organisation.

Specifically, then, monitoring is an objective way to find out things like:<sup>1</sup>

- Are there ethnic groups that seem more or less likely to use our service?
- Are there differences in the ways that different groups use our services?
- What are the possible explanations for these differences?

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<sup>1</sup> Paraphrased from Commission for Race Equality *Ethnic Monitoring: A Guide for Public Authorities (non-statutory p54*

- Do these differences show that there is a problem in the way different ethnic groups see us, or in the way we see them?
- Do different ethnic groups appear to have special, or different needs?
- Are we meeting the needs of the community we serve?
- Have things changed since we last did a similar survey?
- Do we need more data or analysis to investigate this further?

And this can of course be extended to cover any groups you would hope to reach: people of particular age-groups, with particular access needs, with children and so on.

Arts Council England's publications *Respond: a resource for development a race equality action plan* and *Action for Access* also encourage audience monitoring as an important strand of an organisation's plans for equality, while MLA's *Cultural Diversity Checklist* also suggests that collecting information about diversity is a key goal.

### **The Legal and Funding Framework**

The legal framework for monitoring personal information about audiences is formed by the anti-discrimination laws: the Race Discrimination Act 1976, the Race Relations Act 2000 (Amendment), the Disability Discrimination Act 2004 (see glossary for more information on all 3). New legislation relating to sexuality has been implemented in Northern Ireland and is expected in England and Wales and Scotland in April 2007.

Public authorities – like Arts Council England, the MLA and local authorities – have a number of duties to monitor the profile of service-users under the law and as part of their public service agreements. For example, Arts Council England's public service agreement targets include increasing levels of arts attendance and participation among 'priority groups' (defined as disabled people, people from Black and minority ethnic groups and socially excluded people). These targets are measured through a general population survey, but the Arts Council needs to understand the role that public subsidy plays in achieving these targets.

Cultural organisations themselves are not under a specific legal duty to monitor audiences, though providing information may be a funding condition, as may plans and policies which require a monitoring element, such as Race Equality Scheme, Disability Action Plan or Equal Opportunities policy.

The existence of plans like these and proof of their operation could have another important function if you received a complaint from a member of the public. They could help to provide evidence to demonstrate that you have a commitment not to discriminate, and, in the case of the Disability Discrimination Act, that you are attempting to make "reasonable adjustment".

## Public Attitudes Towards Monitoring

As part of our research, we talked to lots of organisations about monitoring the diversity of their audiences. One of the reasons many people felt uncomfortable about using the relevant questions in the ways recommended was because they believed that asking for such information was offensive and unwelcoming. So as part of the project, we tested response rates to different questions and asked people from a number of different ethnic backgrounds about their attitudes to being asked for personal information.

### Being asked about ethnicity

Our survey showed a high response-rate to the ethnicity question as used in the Census - only 3.7% did not answer the question (4% did not give their age). In the questionnaire, we also asked people how they felt about answering these types of questions – from over 600 responses, only 4 expressed anything negative (and not offence, but boredom or irritation): two who identified as "White British", one who identified as "Black British" and one who identified as "African Caribbean"..

Our findings were also mirrored by those from a questionnaire on the website of The Voice newspaper, recording that 93% were satisfied with the way the government collects information about ethnicity.

In focus groups (with a range of audience-members from South Asian, Black Caribbean and Black African backgrounds), interviewees were clear that they understood the importance of these questions, and that it was not offensive. People did, however, want to know the context for asking – a majority feeling that cultural organisations should do more to encourage non-white audiences. If anything, they were suspicious that organisations only asked for this information to *look* as though they were doing the right thing and were concerned that nothing would change as a result.

What seemed most important to respondents was a) that something would be done with the results, b) that the information they gave would not be used for marketing, and c) that the process was direct and honest – one focus group member said:

*"The question has to be explicit, so that you can answer the question honestly because otherwise what's the point?"*

### Being asked about disability

Asking whether or not someone considers him/ herself to be disabled was less frequently perceived by organisations as potentially offensive. In our research work this question has, however, a lower response rate than the ethnicity question: 16% did not answer it in our research, though no-one registered any objection to it being asked. Some of those that did not reply did have access requirements. It may be that the difficulty in answering relates to whether or not someone regards their disability as part of their identity.

**Dissenters**

There will always be individuals who object to some part of the process. Our advice is not intended to dismiss such objections, which may be strongly felt and argued. A recurrent example is that of people who object to the ethnic definition “Mixed”, preferring the term “Dual Heritage”. Organisations should nevertheless feel confident that by following The Guidelines, their approach to monitoring will be widely acceptable. The Guidelines are based on the advice of the Office for National Statistics (ONS); the example given is one of a number of issues on which it is consulting. The ONS is an expert body which continually conducts research and consultation with the public and relevant organisations to improve their practice and to keep up with changes in society.

**Conclusions**

In summary, we discovered a general acceptance of asking for such personal information. It is also clear, however, that the context you give, and way you respond to findings, is all-important - and this is reflected in the advice in the next section.

## **Section 2. The Guidelines**

### **1. Planning**

#### **Developing a monitoring plan**

In order to realise the full benefit of collecting information about audiences, we advise developing a long-term plan. This is also be important in ensuring that the picture you build up is really representative of your audiences, that you have a big enough sample to give you meaningful indications and that you are able to plot progress over time.

Although creating a plan and setting up systems will require investment of a little time, once set up it should be a relatively resource-efficient activity. The key stages of the plan we address here are:

1. Planning
2. Collecting Information
3. Analysing
4. Interpretation & Dissemination
5. Taking Action

#### **Project Management**

Our research suggests that the most effective monitoring is overseen by a project manager who leads the process of planning, collecting information, analysing and dissemination. Because this process affects many people, even in small organisations, it is essential that the project manager is a good communicator and that they have the full support of the company's leadership.

#### **Involving the organisation**

Effective monitoring involves a wide number of people at every level of the organisation. Because it can be seen as an annoying or even threatening exercise for lots of staff, it is important to get widespread buy-in. Consulting with everyone who might be affected in the planning stages is a good start. Once a system is set up, however, it is also important to keep the momentum going and to demonstrate the value of the exercise: keep people updated - not just reporting findings, but what you have done differently as a result.

It is especially important to involve those people who will be collecting the information, such as front of house staff, for example. Provide a clear brief, which includes an explanation of why you are monitoring audiences and how it needs to be done. It will improve the process if you work with the same people over time. Some organisations have had great success by encouraging people to extend their range of skills in

this area, moving on from data-collection to analysis and dissemination; they provided training to help their staff to develop these skills.

### **Allocating Resources**

How much you spend on monitoring should be appropriate to the size and turnover of your organisation. A small organisation with a relatively simple operation and small audience will not need feedback about as many issues and will not need such a big sample. In principle, however, you do not need a large budget to achieve useful results. In fact, planning effectively is likely to save resources rather than waste them.

### **In-house or Out-source?**

Many of the processes we suggest for collecting information can either be carried out in-house or contracted out - from planning and set-up, to data-collection, data-entry, analysis and reporting.

Outsourcing some or all of your research to a specialist can help demonstrate commitment, ensure that results are robust and properly interpreted, and save organisational time. You might also get a more objective view from an outsider. On the other hand, outsourcing may cost more and keeps the experience at arms length from the organisation. Consider what you have the capacity to deliver in house and what you might usefully get from outside: you might just want some advice on the set-up, or specialist help in data inputting and analysis. For more information about researchers and other suppliers, contact Audiences London or your regional audience development agency.

### **A schedule for data-collecting and reporting**

As you will see in the following section, we advise setting up a regular audience survey to collect the information you need across the full range of services your organisation offers. Whether or not you opt for this approach, you will need to set a timetable for the monitoring plan.

Consider when you might need results. Perhaps information is required to feed into particular reports or plans, or to inform major changes in your activities? How frequently will you need to produce information? You will need to balance these needs against the resources available and the time it will take to collect a representative sample.

## Why and what: planning with purpose

It may be helpful to read this alongside the Planning Framework on page 40. In the preparation stages, it is helpful to work with colleagues to decide the answers to the following questions. Once agreed, the answers can serve as the basis of your monitoring plan, briefing and reporting.

### ***How will monitoring audiences affect what our organisation does?***

Being clear about this will not only help you to decide what, where and when to monitor, but will ensure that it is a useful exercise. More than this, for ethical reasons and resource considerations, it is important only to collect information that you actually need.

### ***What aspects of our work will it affect?***

This should only include things that the organisation is willing and able to adapt to be more inclusive. A few suggestions: targets for change and development, programme, communications (what we say and how we say it), facilities (eg. front of house, catering, access), approach to customer care, opening times, prices, outreach work or education programmes, networks and partnerships.

### ***Who do we want to ensure is included?***

This will depend on your policies and activities, but might include good representation across a range of age-groups, local neighbourhoods, people with different access needs, families with young children, people from different cultural communities, and those from different socio-economic backgrounds.

### ***What are our measurements of success?***

Again, this will depend on your organisational plans - whether they are explicit or implicit. But it is helpful at this stage to consider all the quantitative and qualitative audience targets you have set yourselves as an organisation: they may be in the business plan, marketing plan, Race Equality/ Cultural Diversity Actions Plan, particular project plans. If no specific targets currently exist, say for developing the diversity of your audience, now is a good time to discuss and agree how you will recognise success.

### ***How do we know our targets are realistic??***

Obviously a long-term survey will enable you to measure your own progress over time about issues like customer care. But how will you set targets for including your local community and representing the diversity of the population in your catchment area? It might be useful to think about setting targets based on what you know about your local catchment area; you can find out a great deal about this from the Office for National Statistics website. For help using and understanding this information, contact Audiences London or your regional audience development agency.

It might also be useful to set targets in line with those of similar organisations. Again, your regional audience development agency should be able to tell you about general trends in your region and beyond, while the Taking Part survey (see Glossary) is a useful source of information about how the general public respond to cultural activities. Your audience development agency will also be able to direct you to other

organisations with whom you could develop benchmarks. There have been a number of successful examples of organisations getting together to set such benchmarks on a more or less formal basis.

***What do we need to demonstrate?***

...to stakeholders, partners or funders. In an ideal world, you would find out how funders and other stakeholders will use the monitoring information they request as this will help to ensure that you collect the right information in the right way without wasting time and resources. It is worth discussing this during the preparation stage.

***What information do we need to collect?***

Your answers to all the questions above will give you the basic outline of what information you need to collect.

***What methodology will we use?***

In the next pages, you will find advice about carrying out a regular audience survey, probably the best way to collect the information you need on an ongoing basis. You may also want to use alternative ways to answer your questions, or to explore some of your findings in more depth: some suggestions are given on page 32.

## 2. Collecting Information

As we have explored, to be meaningful, monitoring should not just be about recording who is using your services, but about understanding how well you are serving them in order that you can make adjustments. What you collect and the way you collect it should reflect this.

Organisations have a number of concerns about collecting information in a way that is sensitive to audiences' needs and feelings whilst being statistically meaningful. This section addresses these issues.

### Principles of collecting sensitive personal information

There are 4 key principles at play:

#### 1. Self-definition

It is important that respondents in a survey are able to identify themselves, without the researcher ascribing a category to them. *"Membership of an ethnic group is something that is subjectively meaningful to the person concerned, and that is the principal basis for ethnic categorisation in the UK..."* (ONS). So, we need to ask people which group they believe they belong to, rather than assigning an identity on their behalf. Your methodology must reflect this.

#### 2. Comparison to the population

Knowing whether different groups seem more or less likely to use your service requires knowing how your users compare to the population (whether UK, West Midlands, or more local), which means being able to categorise your audiences in a way which matches other information, such as the categories used in the Census. It also means that you need to offer specific categories.

#### 3. Recording of experience

In order to find out whether you are meeting different people's needs, you must ask them for their views on their experience of your services. In other words, there is no point in asking solely demographic questions. It is more helpful, in fact, to think about monitoring in the context of customer care.

### A regular customer care survey

We advise carrying out a regular survey devised to gain feedback from your audiences/ visitors about your activities at the same time as measuring the level of representation from groups you consider important to serve. By doing this, you will be able to assess whether or not you are providing equally well for all groups.

In the simplest terms, it might be useful to think of the monitoring exercise as an ongoing customer care survey and present it as such. You may also want to talk to some audience-members or service-users in more depth - especially when your sample is too small to inform major decisions.

## Gathering a representative sample

In order for your monitoring to be effective, your sample should be representative in two ways:

1. **The full programme:**  
covering the diversity of activities and services you offer to the public, including different spaces, genres and opening times
2. **The total audience:**  
ensuring that you encourage responses from a broad range of people, not just “insiders” or regular users more willing to get involved in a survey

The way cultural organisations have typically surveyed audiences has tended to favour core attenders. It can be particularly difficult to get responses from first-time attenders – many feel that because they are new, their opinions are less relevant, or are intimidated by being asked for a view on a subject about which they lack confidence. The more reassurance you can give, and the more open to different kinds of attenders your questions and your methodology are, the more representative your survey is likely to be.

### Example of a methodology favouring “insiders”

XX company sent a questionnaire out to advance-bookers who had asked for their tickets to be posted to them, because their addresses were easily available. But this approach favoured people who like to book well in advance, and by post. Both these behaviours are more common among older than average and – in this case – more committed attenders. Further, this approach only included people who actually made the booking, not all those attending. (See page 17 for more advice about methodology)

### Sample size

What constitutes a big enough sample will depend on many issues such as what information you want to collect and what you want to do with it, as well as what is affordable and manageable for your organisation, so there is no one solution.

Broadly-speaking, however, **250 or more responses will provide a reasonably robust sample**, giving a good indication of what audiences are like and what they think of your services. 100 responses can suffice for simpler analysis if this is all your resources will stretch to. Less than 100 is unlikely to be enough to be statistically reliable, unless you are looking for very specific information. The smaller the sample, the less you can cross-reference information. So, as soon as you start looking at small sub-groups, the less reliable the results become. You will need to take this into account when interpreting results and deciding what action to take. Following is an example:

### **Understanding indicative information**

*XX Museum has a sample of 250 completed questionnaires. With a sample of this size, they can be reasonably confident in the findings that around 65% of their visitors are of a white background, 35% from other ethnic backgrounds, and that 85% are either satisfied or very satisfied with their service.*

*Around 9% of visitors (23 respondents) are from Black African backgrounds. When they “cross-tabulated” this information with user-satisfaction levels, they discovered that only 65% of Black African respondents were satisfied with their service, compared to 85% of the whole sample.*

### **Did this mean they had a problem?**

*Because the Black African sample was quite small, they couldn't be sure that this was “statistically significant”. But it still gave them an important indication.*

*So in this case, they carried out 2 further kinds of investigation. They looked back at the previous year's results and discovered a similar indication, which backed the idea that there might be some cause for concern. They then held some customer circles with Black African residents in their area to find out more about their views.*

*What they found out prompted a decision to change the way in which they presented some of their collection and they invited a local association to become “mystery-shoppers” for them over the course of the following year.*

This example demonstrates a common challenge of diversity monitoring. Differences in levels of satisfaction between minority groups are unlikely to be statistically significant unless the differences are very great or the proportion of audience members from those groups is rather high. This is not a reason NOT to monitor, just something you need to be aware of in interpreting findings. While larger organisations may want to consider collecting larger samples, as this example shows, a small, simple study still yields important indicative information.

The matter of sample sizes is quite a complex one. It's a common misconception that you need to survey a proportion or percentage of your audience for a relevant sample, ie that a large audience needs a larger sample than a small audience. This is not true – however, a larger organisation, spending more money, might be expected to invest more in diversity monitoring and audience research, in order to ensure that their money is well spent and they are moving closer to their objectives. See 3.3 Sampling on p 48 for a detailed explanation of sample sizes and confidence levels.

### **Where to carry out a survey**

The important principle here is to make sure that those who take part in a survey are as similar as possible to those who don't. This means that a) as broad a range of people as possible should have the opportunity to respond, and b) there should be the least possible dependence on the respondent being strongly motivated to give their opinions. This motivation might be based on them loving or hating the work that they

have just seen, or their encounter with your staff, and - more importantly - is likely to depend on how entitled they feel to their opinions. Those that attend frequently, or know a lot about an artform, or are in general “culturally advantaged”, are much more likely to feel that their responses are important. In contrast, those attending for the first time, or with little artform knowledge, tend to feel that their opinions have no value.

This means that if questionnaires are left out for passing visitors, a small and highly selective group of people will tend to respond. When people are approached personally to take part in a survey, however, active refusals are rare. A sample collected in this way is more likely to reflect your audience as a whole.

1. **On-site/ in-venue survey**

For the reasons explored, if conducting a survey in a venue, have staff or volunteers approach people and ask them to fill in a questionnaire, or interview them.

2. **Telephone survey**

Although a more expensive option, this can help to ensure a representative sample as people can be screened to get a good mix. It may not be cheap, but it could be cost-effective, and allows you to survey an audience retrospectively. Telephone surveys are usually widely accepted by respondents, providing they know the organisation involved (ie *not* cold calling). Consider external support for this option – research design, sampling and interviewing are specialist skills and getting them right for telephone research is particularly important; you could also consider training staff as interviewers.

3. **Online survey**

Online access is not universal, but may be widespread enough among your audience. It is a low-cost option, saving on postage and data-inputting costs. It can be usefully out-sourced, usually at low-cost, to give an assurance of confidentiality. You can elicit responses not only from attenders, but also from website visitors (to find out whether there is something missing or off-putting in your online presence). Experience shows that responding online seems less dependent on the motivation of the respondent, compared to postal surveys.

4. **Postal survey**

Research has shown that respondents to postal surveys tend to come from older and keener customers. They may be useful for researching a group that you know matches this demographic, such as subscribers, but probably not for diversity monitoring.

It is probably best to survey your audience while they are in the building – you have access to more of them than via booking records or a mailing list – perhaps using other means to fill in any information gaps from time to time. Managing the process on-site also means that you can redress the balance of self-appointed spokespeople, usually, as we have said, core-attenders.

## Getting A Random Sample

As suggested, staff should manage this process and should work within a sensible “**sample frame**”. This could mean approaching every 10th person or some other neutral method of representing the audience; try to avoid sample frames favouring a particular kind of person - eg. people sitting in one price band or visiting at a certain time of the day. For a fairly broad-brush exercise, don't worry too much about nailing a perfectly representative sample, just agree a manageable system with those approaching or interviewing members of the public.

It is therefore important to **brief** those carrying out this work, provide some notes and ideally hold briefing or training sessions at relevant intervals. Working closely with in-house staff has an additional benefit in that it involves those that are already closest to the customers in a process of review and self-evaluation.

## A useful survey schedule

You will also need to think about including a good range of your activities and services. The best solution we can suggest is to organise your data collection on a steady, regular basis throughout the year. This will build up to a large and representative survey over the course of the year. As well as covering the broad pattern of your core work, you might need to make sure that you include events which are specially designed to attract different audiences; it might make sense to augment your regular data-collection with more intensive surveys for particular events. Remember, though, that if you put all the results together, the results from intensive surveys of audiences for unusual work might skew overall results - you should keep these separate and compare the two sets of findings, or weight the results when you combine them (you may need to use an external consultant to advise you on this).

### ***XX Arts Centre Survey Schedule***

*decided to collect 5 questionnaires pre-show and in the interval of every show, building this into the routine of an usher on every shift. They average about 2 shows per week:*

*50 weeks x 2 performances x 5 questionnaires = 500*

### **XX Gallery Survey Schedule**

*The Gallery decided to collect 30 questionnaires on the first Monday and final Saturday of each of its 9 exhibitions during the year:*

*9 exhibitions x 30 Monday questionnaires + 30 Saturday questionnaires = 540*

*They would try to stick to a sample frame of 1 in every 10 visitors (average attendances approx: Mondays 300, Saturdays 750) throughout the day. As this was sometimes difficult, they decided to top up on Tuesdays and Sundays if they failed to reach the target of 30.*

*During the course of the year, however, the Gallery had programmed the work of a number of contemporary artists from the Indian sub-continent - as part of one major exhibition but also for a series of talks and lectures. As this was a key part of their audience and programme development strategy, the Gallery decided to extend their survey to include this work, collecting around 500 of the same questionnaires across the programme so that results could be compared with the main sample.*

*1 exhibition x 30 questionnaires per day for 14 days = 420*

*+ 10 talks and events x 10 questionnaires = 100*

*Grand total = 520*

*The results from each batch (Indian sub-continent exhibition, other exhibitions weekdays, other exhibitions weekends) could be compared to one another easily. In order to provide answers from the combined responses, they would need to be weighted according to what proportion of visitors overall came to each.*

## The Questionnaire

We have provided a sample questionnaire (see page 42), which you may find it useful to refer to – you can also download a version directly from [www.audienceslondon.org](http://www.audienceslondon.org).

### The Questionnaire: putting it in context

In the introduction to your questionnaire, explain why you are carrying out a survey and what you will do as a result. You might want to include a simple statement of your values and in particular your desire to serve all members of your community equally. People can be a little cynical about exercises like these: if you have ways of showing that you are acting on the information you collect, so much the better. You could, for example, publish results and comments on your website, encourage more feedback, or publish the changes and adaptations you make based on customer feedback. Our sample questionnaire given provides an example, but this will need to be manageable and truthful for your own organisation.

It is also useful to provide a context for the questions about personal information. In our questionnaire we said:

*“Your answers will help us to understand if we are offering an equally good service to everyone in our communities.”*

In our focus groups we also tested

*“As recipients of public funding we have a responsibility to collect information about our audiences. Please help us by answering the following questions.”*

The focus groups preferred the first statement, as they liked the emphasis on the public benefit, though they also thought that the second statement was important and could be incorporated. It is also worth bearing in mind that changing social attitudes (as highlighted in Policy Commission on Public Services, 2004) mean that the public increasingly expect the same levels of choice, customisation and quality in public services that they expect from the private sector

### The Questionnaire: general design tips

**Length** although you may have identified a lot of areas to monitor, your questionnaire should be a manageable length, so you will need to prioritise. A questionnaire that takes more than five minutes to answer may be off-putting to all but the most committed audience members. As a general guideline, an A3 folded to A4 should give you enough room without intimidating a potential respondent. You might consider telling people how long it will take.

#### **Inclusivity**

Phrase the questionnaire so that it invites responses from a broad range of audience members,

and not only those who are already “insiders” to the organisation or the artform - don’t use jargon, do use plain English.

### **Ordering Questions**

It is customary to place demographic questions at the end of the questionnaire. Answering questions about what they think of your work is of more interest to most respondents, and is likely to encourage responses. And personal information is more likely to be forthcoming when you have gained their trust through earlier questions which don’t make them feel stupid or offend them..

### **Phrasing Questions**

As a general principle, try to keep your questions clear, unequivocal and unbiased, and provide a “don’t know” option where relevant. Think too about how you will input and analyse responses: there’s no point in including variations you can’t then analyse. We have suggested some questions in the sample questionnaire.

### **“Free response” questions**

such as “Is there anything else you would like to say about your experience or the work of this organisation?” not only allows you to capture any opinions which were not covered by your other questions, but also encourages responses as people feel that their opinions are valued.

### **Providing an incentive**

(eg entry into a prize draw) will encourage responses, especially if the prize is not something associated with visiting your venue again (such as free tickets for another show, or a meal in your café) which is not an incentive if they did not enjoy their visit

### **Focus Group Permissions:**

Asking whether they would be willing to take part in a further discussion will enable you to recruit focus groups if you find that there are issues that you need to explore in more depth

### **Direct Marketing:**

Offering to add them to a mailing list: This is not related to diversity monitoring specifically, but whilst it is fine to ask for peoples contact details for the purposes of the research (ie for further discussion or a prize draw) it is not good practice to ask people whether they want to give you their details for marketing purposes. By all means offer this, but keep it separate (ie on separate slip of paper, or by a link to a sign-up page online) rather than incorporating it in the questionnaire.

## Monitoring Ethnicity

*“Membership of an ethnic group is something that is subjectively meaningful to the person concerned, and that is the principal basis for ethnic categorisation in the United Kingdom...this means that we should rather ask people which group they see themselves as belonging to<sup>1</sup>.”*

This principle should inform your overall approach. Despite concerns about using a tick-boxes for pre-defined ethnic categories, we would strongly advise doing so and using the categories used in the 2001 Census by the Office for National Statistics (ONS) (see sample questionnaire 42). The reasons for this link to the principles for monitoring sensitive personal information given on page 15.

### 1. **Self-definition:**

A tick-box is the most effective way to enable people to “self-define”. If you give an open-ended choice, someone will have to re-define the description the respondent gives in order to analyse the information. Making such assumptions could be wrong in both an ethical sense – denying an opportunity to self-identify – and in a factual sense: eg. presuming that Jamaican or African equates to Black. You should also highlight that there is no imperative for a respondent to tick a response with which they are not happy – always include an “Other” and write-in option.

### 2. **Comparison to the population:**

*“Are there ethnic groups that seem more or less likely to use the service?”<sup>2</sup>* This can only be answered with reference to the ethnic breakdown of the total population of a local catchment. This means being able to categorise your audiences in a way that enables you to cross-reference Census information, the most reliable information about ethnicity. It is important therefore to mirror their categories.

### 3. **Reliability, acceptability, familiarity:**

The Census categories have been extensively tested and the categories are constantly reviewed through consultation.

In addition, we found that focus group members of various ethnic backgrounds *preferred* tick-boxes to a free response question in this regard. They said that it made the question quicker and easier to answer (reducing respondent burden is an important principle in questionnaire design). In fact, they reacted negatively to the idea of a free response box, concerned that organisations would make wrong assumptions. (See page 9 for more information on this research).

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<sup>1</sup> Office for National Statistics – *Ethnic group statistics: A guide for the collection and classification of ethnicity data*  
[http://www.statistics.gov.uk/about/ethnic\\_group\\_statistics/downloads/ethnic\\_group\\_statistics.pdf](http://www.statistics.gov.uk/about/ethnic_group_statistics/downloads/ethnic_group_statistics.pdf)

<sup>2</sup> *Ethnic Monitoring: A Guide for Public Authorities* (non-statutory): Commission for Race Equality

## How to ask about Ethnicity

Ask the question exactly as in the Census and use all categories, in the same order:

### How would you describe your ethnic origin?

*Please tick one description (as recommended by the Commission for Race Equality) with which you identify or write in another answer.*

#### A. White

British  Irish  Other white: \_\_\_\_\_

#### B. Mixed

White and Black Caribbean  White and Black African   
White and Asian  Other mixed: \_\_\_\_\_

#### C. Asian or Asian British

Indian  Pakistani  Bangladeshi  Other Asian: \_\_\_\_\_

#### D. Black or black British

African  Caribbean  Other Black: \_\_\_\_\_

#### E. Chinese or any other ethnic group

Chinese  Other: \_\_\_\_\_

While using all the ONS categories does take up space, abbreviating categories reduces the acceptability of the question to respondents. It can also mask significant differences between subgroups (eg organisations might be communicating very well with Indian audiences but badly with Pakistani and Bangladeshi), so all the sub-categories of “Asian” should be used.

The order and wording of the ethnic group question is important. The Mixed option needs to be before any of the other minority ethnic groups as it is a new category, and people may not be looking for it. There is more information about this, and explanation for why this is important, on the Equality and Human Rights Commission’s website ([www.equalityhumanrights.com](http://www.equalityhumanrights.com)) and in the ONS guidelines (see Resources).

Sub-categories additional to those used in the Census can be added as long as they fit within the existing overall umbrella categories. For example, an additional “Sri Lankan” category could be added to the Asian category because this does not cross cut any of the existing categories. However, care should be taken not to cause offence either by including some additional ethnic groups and not others, or by the way in which groups are named. Likewise, think carefully about asking more specific questions about religion or language. It is a complicated area and you may raise expectations amongst respondents about what you would do with the information.

**Translating the questionnaire**

In many situations, it is not appropriate to translate the questionnaire. If your promotional material, events or activities rely on a good grasp of written English, you are unlikely to need to translate a survey.

Translating into some languages and not others may also cause offence. If you do need to have a questionnaire translated, always make sure that it is checked by a native speaker and find out about literacy rates in the relevant community (you may also need a community worker to help non-readers).

## Monitoring Disability

Many of the ethics and principles surrounding monitoring disability are similar to those involved in monitoring ethnicity, although the practice - and the available advice - is more developed in the field of ethnicity. It is important to understand that not all people with access needs necessarily identify as being Deaf or disabled.

If you ask a person whether they consider themselves to be disabled, you are asking about their identity, and this varies a great deal. Someone may have a hidden disability, which may have little impact on the services you offer them, but which nevertheless forms part of their identity. On the other hand, people that acquire a disability later in life are less likely to identify as a disabled person, but in fact form the majority of those that are disabled. So in addition to asking about whether someone identifies as disabled, you should ask about their access needs, as those that do not identify as disabled are still covered both legislatively and ethically by the principle of non-discrimination and equality of access.

An important difference compared to ethnicity monitoring is that there are no detailed government figures for you to compare to. Although around 20% of the working age population is disabled<sup>1</sup>, (16% in London), you will not be able to work out how many disabled people live within your catchment area. While available location-based indicators include the percentage of the population receiving Disability Living Allowance benefit, Incapacity Benefit or Severe Disablement Allowance, and those that, in the Census, said that they have a Limiting Long Term Illness – these sources still do not equate to the disabled population.

Nor should you use questions that relate to these benefits. The ONS have recognised that the question used in the 2001 Census is not acceptable under the Disability Discrimination Act and are currently consulting as to a way forward; **you should not therefore refer to the Census on this issue.**

### How to ask about Disability

Instead, in order to understand how well you are serving the needs of disabled customers, we would strongly advocate following the principles of the Social Model of disability. The key principle here is that you do not need to know the nature of someone's impairment, only what adjustments you should make to ensure your services are accessible. So, do give people the option to identify as Deaf or disabled (note the Deaf community consider themselves as a distinct community):

*Do you consider yourself to be*  
Deaf     Disabled     Neither

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<sup>1</sup> Disability Rights Commission Disability Briefing December 2004

Also give respondents the option to make particular access needs known. DON'T ask people about the nature of their impairment. The example below shows some of the most common access services, but you will want to adapt this to what your own organisation currently offers:

Do you/ have you use/d any of our access services?

(Tick as many boxes as apply)

	tick		tick
Large print	<input type="checkbox"/>	Sign-interpreted performances	<input type="checkbox"/>
Audio-tape	<input type="checkbox"/>	Induction or infra-red loop	<input type="checkbox"/>
Lift/ other wheelchair provision	<input type="checkbox"/>	Surtitles	<input type="checkbox"/>
Other (please explain)	Other suggestions of access services you would like us to provide:		

### **Making the questionnaire accessible**

Think about making your questionnaire available in alternative formats: in large-print or by email. The easiest way might be to brief those carrying out an on-site survey to include and assist disabled audience members - and to make that clear on your questionnaire. Or if you are conducting an online survey, make sure that you offer a plain text version (most survey software offers this). We discovered, as part of another research project, some disabled people feel excluded from giving feedback because mechanisms for doing so are not accessible.

## Monitoring Young People

The key issue to note when surveying young people is that you should not survey those under the age of 16 without gaining the permission of a responsible adult in advance (although there are concessions for 14- and 15-year-olds out without an adult). For example, you might approach a school party with the express permission of their teacher, or you might obtain written permission for future reference from a parent when a young person joins the youth theatre. The Market Research Society offers sound guidelines on this subject - [www.mrs.org.uk](http://www.mrs.org.uk). If surveying under-16s, you should also refer to your child protection policy: see Arts Council England's Keeping Arts Safe guidance paper.

### How to ask about age-groups and young people

ADUK offers the following definitions.

**Family Definition** A party which enjoys an association based on some form of kinship, that is made up of any adult attending or participating in a cultural event with a child under the age of 16.

**Young Person** Someone who is not a legal adult, and thus should be treated as a minor; usually 16 and under.

ADUK also suggests using these categories (or sub-categories within them) so that you can compare data with that commonly collected in the cultural sector.

#### Age Group Categories

16–24       25–44       45–64       65+

## Monitoring Sexual Orientation

This is the area which has the least well-established practice to which we can refer, and for this reason it was not included in the survey which Audiences London tested for the Diversity Monitoring project. One reason for this controversy is that someone may have an identity which they are not willing to publicly reveal. The Office for National Statistics has said that they do not yet have a question which is widely-accepted and comprehended sufficiently to be able to include it in the 2011 Census, though this is being challenged by those concerned with gay rights.

### How to ask about sexual orientation

However, a question which might not work well in the Census could still work for an organisation's audience. If you were interested in being able to monitor the sexual orientation of your audience, we would suggest the following question:

*Do you consider yourself to be*  
*Lesbian/Gay*     *Bisexual*     *Heterosexual/straight*    *Other*

If you are conducting the questionnaire as an interview, it may be preferable to provide this as a list on a "show card" with letters or numbers beside each for the respondent to choose, in order to keep their answer private – and to have show cards with different codes attached, so that respondents do not know one another's answers, if you are conducting many interviews in one session.

Please note that if you wish to ask about transgender, you should include this in your question about gender, not in a question about sexual orientation. Note too that the above list of options only work if you do ask a question about gender, otherwise you should provide lesbian and gay as separate options.

## Monitoring Religion

There is less developed practice in monitoring religion, and people will be less used to having it included in a questionnaire. Religion was included for the first time in the 2001 Census, and was the only question which was not compulsory – 7.7% chose not to answer the question, showing that there was some resistance to the question (though this may particularly rate to being asked by the Government).

It is a potentially legitimate issue to monitor, however, especially as concerns about exclusion on the grounds of religious belief increase. Do think about the expectations that you might raise if you do ask your audience about this – what might you do with the results? How might you change your practices to accommodate a broader range of religions? Given the challenges around asking about religion, it may be better to ask specific questions, say about opening times which are sensitive to particular religious observance, than to ask about religion per se.

### How to ask about religion

If you do decide to ask about religion, the question included in the 2001 England and Wales Census was:

*What is your religion?*

- |  |                          |
|--|--------------------------|
| <i>None</i>  | <input type="checkbox"/> |
| <i>Christian (including Church of England, Catholic, Protestant and all other Christian denominations)</i> | <input type="checkbox"/> |
| <i>Buddhist</i>  | <input type="checkbox"/> |
| <i>Hindu</i>   | <input type="checkbox"/> |
| <i>Jewish</i>  | <input type="checkbox"/> |
| <i>Muslim</i>  | <input type="checkbox"/> |
| <i>Sikh</i>  | <input type="checkbox"/> |
| <i>Any other religion (please write in)</i>  | <input type="checkbox"/> |

Bear in mind that the question used was different in Northern Ireland and Scotland – refer to the Office for National Statistics for more information. Also, according the ONS, the responses given will vary enormously depending on the precise wording of the question – particularly for the proportion of those identifying as Christian, answers for other religions tend to be more stable.

## Monitoring Other Issues

### Involved Participants

The main focus of the Guidelines is on monitoring the profile of audience members with whom an organisation has either a fleeting and/ or an arms-length relationship. They may be ticket-buyers, exhibition attenders, workshop participants. Because they are both numerous and largely anonymous, they present particular challenges in terms of monitoring.

Much of the monitoring advice available elsewhere tends to focus on ongoing and substantial relationships such as those with employees, patients or students. Some cultural organisations have similarly substantial relationships with participants – be they Friends, members of a youth theatre, volunteers, people co-creating an event or installation. Participants are probably known to the organisation by face and name and have more expansive expectations of the relationship.

For such “involved” participants, the principles and purpose of monitoring remain the same, but the way in which information is collected is different. The advice for monitoring audiences is based on using a *sample*, but it is more appropriate to monitor *all* involved participants. Broadly speaking, and in line with advice for a wide range of public service-users, organisations should record details of identity and needs at the beginning of such a relationship, and then return to them for feedback later on. This process might often form part of a project evaluation.

In practice, you may find that your participatory activities attract people somewhere between these two poles, and you will need to think about how best you can include them in your monitoring.

### Refugee/Asylum Seeker Status

Please be very cautious about asking any question related to a person’s immigration status. It is quite likely to cause some anxiety or possible offence amongst those affected by uncertain immigration status. If you have a refugee or asylum community which you are particularly concerned about serving, it would be better to contact a community organisation to work with in this area.

### Social Grade

Research methodologies to determine **social grade** are relatively complicated, while this information is not widely collected by cultural organisations in in-house research at present. However, if you are interested in exploring this issue further, do contact Audiences London. You may also find the ADUK protocols useful for explanations of the different classifications used for social grade and their applications.

## Complementary Methodologies

There are areas of your activity for which a regular survey may not be an appropriate way to monitor users and their opinions. Moreover, as we noted in the example above, it may be necessary from time to time to explore some of your findings in more detail. Here is a quick overview of ways of collecting feedback and monitoring which can complement a regular survey.

### Informal and formal feedback

Don't forget that your colleagues who deal directly with the public may understand more about customer responses. A regular survey could be augmented by the observations of front of house colleagues, especially where you have a system for sharing this information. Additionally, capturing comments and feedback can be done through well-publicised boards/ cards/ visitor books in public spaces or on your website. Remember you should not expect staff to assume the identity (ethnicity etc) of customers, but you could add monitoring questions to feedback forms if you felt this would be illuminating. Again, make it clear to people why you ask for this information.

### Using digital patron data

Digital patron data (such as that collected on a box office computer) which includes someone's post-code can be used to give large-scale indicators about changes in the make-up of audiences, and can generate useful information for a variety of purposes. However, such data only suggests the *likelihood* of attenders' demographic based on their postcode. Because it does not allow for self-identification, and because it cannot tell you anything about the reasons certain groups might be attending or not, it is not suitable for diversity monitoring.

Nevertheless, such profiles can provide useful context for monitoring. It can be used to help measure your own progress against targets and to supplement what you discover as part of a regular survey. So we would recommend that, if you have digital patron data, you use it in combination with information captured by survey. It can help you to understand indicators and trends from your monitoring and provides sound foundations for an audience development plan. Examples of how you might use digital data to augment your monitoring include:

- Using **concession or discount types** to monitor whether or not you are reaching particular audience segments
- Using **maps** to see how well you are serving different neighbourhoods with different parts of your programme
- Using **geo-demographic profiles** to see what kinds of communities you are attracting – and locating new potential audiences.

### **Exploring attitudes in more depth**

A survey may serve to indicate that you are serving some parts of your audience less well than others. This could, for example, relate to problems with the ways that different ethnic groups see your organisation, or to different groups having different needs which your organisation is not meeting equally.

Before taking any major action, we would strongly advise that you carry out more in-depth investigation. The most useful methodologies are probably qualitative, including:

- *Focus group or customer circle*
- *Mystery-shoppers (an anonymous visitor invited to observe and report on their experience)*
- *Telephone interviews*

If you are on a tight budget, you could recruit and facilitate any of these yourself, perhaps working with local contacts and organisations. However, you will get a more balanced and honest view if you work with an independent and skilled moderator or interviewer.

## Data Protection

You need to be aware that data protection legislation does have an impact on how you collect and use sensitive personal information. The Information Commissioner considers the following as Sensitive Data:

- racial or ethnic origin
- political opinions
- religious or other beliefs
- trade union membership
- physical or mental health condition
- sex life
- criminal proceedings or convictions.

The important principles here are:

1. **that you do not collect data of which you have no legitimate need**

Monitoring policy around equal opportunities is considered a legitimate need, but it is helpful to make your reasons explicit on any questionnaire

2. **that the data you store and use is not linked to a named individual other than for research purposes**

So make sure that responses are kept anonymously and that you make this clear on your questionnaire. You can collect names and addresses for a free prize draw, say, or to recruit people to discussion group, but you shouldn't store this information with the data that you collected through the survey. And you should also ask for explicit consent to use their details for these purposes (eg 'Would you like to be entered into the Prize Draw? Yes/No', 'Would you be willing to be contacted again to take part in future research? Yes/No'. You must not use respondents' contact information for any purpose that they have not consented to (eg marketing purposes). It is best to hand out a separate card on which people can join a mailing list, if possible.

It might give the right signals to stress the confidentiality with which information will be treated.

## 3. Analysing the Data

### Preparing the data

Before you can use the data collected in a survey, you will need to input it into a digital format. If you are analysing the data yourself, you should not need anything more sophisticated than a spreadsheet. Some basic training might come in handy<sup>1</sup>. Specialist software is available to help you design and analyse a questionnaire – Audiences London can help you to choose if you are considering doing the work in house.

The cheapest option would be online survey sites such as [www.surveymonkey.com](http://www.surveymonkey.com), which allow you to design and analyse a simple survey for free (although it is intended for online questionnaires, you can collect the responses on paper and then enter them yourself into the web page for easy analysis). A popular option for more advanced software is Snap, although this would be beyond the needs of most organisations.

Data-inputting could be carried out in house or is relatively cheap to outsource, from about 50p per questionnaire. If you are going to do inputting in-house, however, do make sure that your inputters are carefully briefed and meticulous in the way they enter data into the spreadsheet. In either case, it is important that the quality of the data held is checked before any results are acted on (or published!). There are two easy ways to quickly check this – are you seeing the right sort of data, for example, numbers or text? And do the results pass a common-sense check – if you have many more responses from your studio space than from your main house, then either the answers are coded wrongly or your responses are not representative.

### Statistical Significance

By and large where you have a good sized sample and are looking at well-differentiated results, statistical significance need not be an area for concern. Where important decisions are to be informed by the results of smaller samples or where results are close run, it may be worth considering some professional help in analysing results. See Some Notes on Sampling on page 48 for more information.

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<sup>1</sup> Audiences London and other agencies provide arts-friendly workshops or think about a basic Excel training session; AL can provide details of all

## 4. Interpretation & Dissemination

It might be helpful to think that you are telling a story with numbers - and that you are editing the story for different people. Too much information or irrelevant information will confuse your audience. In preparing your plan, you will have a rough idea about who wants to know what; this will help you to tailor information accordingly. So you might prepare a different report for the board than for the marketing department, or draw the finance department's attention to a different finding to the front of house team's.

There are lots of guides and advice to presenting research findings, but given that the monitoring process described here uses fairly simple data, you might find our summary useful. There are some more suggestions in the Reading and Resources section.

It's worth thinking about 3 issues:

- Context
- Clarity
- Consequences

### Context

Create a context by using comparative information which will help make sense of your own findings. In other words, you need to contextualise results by referring to the targets and measures of success you have determined in the planning process. Additionally, you might find it useful to look at other external comparators against which you might measure your own success – or benchmarks.

Useful sources of comparative and benchmark information include:

- Your own previous survey data
- Your own data collected in other ways (eg. box office, feedback boards)
- Regional information from ONS website [www.statistics.gov.uk](http://www.statistics.gov.uk)
- Information from local authorities or the GLA website
- Centrally commissioned omnibus surveys, such as ACE's Arts in England and Focus on Diversity and the DCMS Taking Part
- Comparative information from another cultural organisation or consortium
- TGI Area Profile reports (ACE available through Audiences London and other audience development agencies)
- Information on attenders within the region from Snapshot London (Audience London's data-sharing project) or other regional data analyses

## Clarity

Using visual representations like graphs and diagrams is helpful to most people. If you are not sure how to extract these, again think about some basic training.

Most people find it easier to understand data in a visual format, so think about presenting information in:

- Tables: to present simple numeric data
- Pie-charts: to display the proportion of a total in relative terms.
- Bar-charts: to express the relationship between the data values
- Graphs: to show movement over time
- Map: to show geographic distribution - of audiences, or venues etc.

General tips for the graphic representation of results include:

- Ensure that the picture accurately represents the data; be clear about your aim: eg. "I want to show the relationship between the increasing price of tickets and the audience frequency of attendance"
- Make the diagram simple enough so that the reader can quickly assimilate the message; it shouldn't need a lot of study.
- Use colour to get your message across. Most readers try to understand the message of any diagram without reading the scale or other associated information.
- Always label the chart effectively - people shouldn't need to refer to anything else. Always include the real numbers somewhere (eg footnote) not just percentages
- To make stats easier to absorb, its best to simplify them when reporting the data unless of the detail is of particular significance, so generally...
- Don't include more decimal places/significant figures than you need to (eg 5 is easier to read than 5.1 or 5.14, and 5 million quicker to absorb than 5,140,352
- Use percentages or averages where you can

## Consequences

The most important factor is that the information is presented in such a way as to enable it to serve its purpose: refer to your research objectives and make sure that you present the information so that it connects with these. Conclude with any recommendations for:

- changes to your objectives and targets,
- adaptation of your activities,
- further research you need to carry out
- changes to the monitoring methodology itself

## **Sharing Information**

Ideally you will have decided where and when to present the results of your monitoring in the planning stages. A written report is essential for reference, but your findings and their implications will come to life if you can present them in a live forum. Our advice is to use “existing platforms” and try to build reporting into existing routines. Examples of forums used include:

### **Internal**

- Head of department meetings
- General staff briefing
- Board papers/ board meeting/s
- A regular post-show, post-season report
- Frontline staff briefing session

### **Other Stakeholders and Influencers**

As a way of underlining your values, think about broadcasting the process and positive findings and responses widely: user-groups (eg Friends), fundraising contacts, funders, on your website or Annual Report, more widely across the industry, among potential employees, in your local community, with project partners and key suppliers - such as PR, marketing, market researchers, graphic designers etc.

## **5. Taking Action**

The results of your survey could suggest ways in which you could adapt your services or facilities for the good of all audiences. They could prompt simple physical changes to signage or parking facilities, for example, or developments of strategy such as the communication mix, or the timing of activities.

If you do find indications that particular groups are less positive about their experience, you could consider targeted approaches – examples might be the introduction of a new ticket discount, setting up a user-group or Disability awareness training for staff.

### **Checking Findings**

However, before you decide to make any major investment of time or resources, you need to be sure that your decisions are based on statistically significant information (see Some Notes on Sampling for instructions p 48). Chances are however, that a simple survey will only give you clues which will need further investigation, using any of the research approaches suggested in Complementary Methodologies p 32.

### **Communicating the impact**

If you do take action in the light of customer feedback, find ways to communicate these changes. Whether you post them on your website, in newsletters, on-site etc, this will have obvious PR benefits, action speaks louder than words when it comes to making audiences feel valued and to creating a sense of ownership. More than this, however, making the benefits of giving feedback plain will encourage audiences to take part in future monitoring; you might, for example, choose to tell people about the impact of previous surveys in the preamble to a questionnaire.

## Section 3 . Tools

### Planning Framework

This outline is a checklist covering the planning stages and considerations discussed in the previous section (see page 13). This version gives you some examples (in grey italics) but you could use or adapt a blank version to help you put together your own monitoring plan. Download blank versions from [www.audienceslondon.org](http://www.audienceslondon.org).

1. Agreed Purpose	
Key aim/s of the monitoring plan	
Plan, strategies and reports it will affect	<i>Cultural Diversity Action Plan, Audience Development Strategy, Quarterly London Councils reporting; Bloomberg under-25s scheme</i>
Key stakeholders	<i>Board, ACE, ALG, LB XX, Project Steering Group, Bloomberg</i>

2. Operational Planning	
Project Manager	
Budget available	
Budget required	
Key deadlines for results	
Period of this plan	
Frequency of reporting	

3. Activity to Monitor	Who to consult	Methodology?
<b>About our services?</b>		
Information	<i>Marketing, BXO, graphic designers</i>	<i>Survey; core question</i>
Programme	<i>Programmer, Education teams, Heads of Departments meeting</i>	<i>Survey</i>

Youth Theatre		<i>Joining form/ exit interview</i>
<b>About our facilities?</b>		
Restaurant/ bar	<i>Head Operations; franchise companies</i>	
Car park		
Signage		
<b>About our partners and competitors?</b>		

<b>Key Audience Groups</b>	<b>Stated Targets</b>	<b>Comparative data</b>	<b>Possible methodology</b>
<b>Age-groups</b>			
<i>Under 25s</i>	<i>10% of concession take-up</i>	<i>Own BXO records for under 25s  Population stats for LB XX</i>	<i>BXO data; young persons ID.  Survey age and user-satisfaction on prices</i>
<b>Cultural background</b>			
<i>South Asian Community living in our catchment</i>	<i>10% of ticket-sales over 1 year</i>	<i>Population stats, calculated</i>	<i>Survey ethnicity and postcode</i>
<i>Kurdish community in XX</i>	<i>50 people to join social club</i>	<i>N/r</i>	<i>Survey; add special Kurd category to ethnicity.  Social club interviews</i>
<b>Disability</b>			
<i>All audiences identifying as deaf or disabled.  People with stated access needs</i>	<i>Average or higher than average satisfaction ratings</i>	<i>Compare results with our total audience  Compare results with XX partner venues</i>	<i>Survey in venue  Survey sent to patrons requesting alternative formats</i>
<b>Across our catchment</b>			
<i>Audiences from LB XX1</i>	<i>10% or more of all attenders over 1 year</i>		<i>Survey borough</i>

<i>Audiences from LB XX1</i>	<i>10% or more of all attenders over 1 year</i>		
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<b>Collecting and analysing data - steps</b>	<b>When</b>	<b>Responsible</b>	<b>Additional costs</b>
<b>Questionnaire Design</b>	<i>Annually (deadline)</i>	<i>Project Manager to draft, with help from AL</i>	<i>None</i>
<b>Audience Survey</b>	<i>Every new production; see full schedule</i>	<i>1 usher to distribute pre-show, interval, post-show as part of duties. FOH Manager to oversee on a daily basis. Project Manager to brief/ report back to FOH staff every 2 months.</i>	<i>None</i>
<b>Data-inputting</b>	<i>After every-show</i>	<i>Outsourced to XXX suppliers. Project Manager to co-ordinate</i>	<i>50p per questionnaire; target 500 x 50p = £250</i>
<b>Data-analysis</b>	<i>Bi-annually</i>	<i>Project Manager; advice on interpretation from AL</i>	<i>1 session at £150</i>
<b>Report preparation and recommendations</b>	<i>Bi-annually</i>	<i>Project Manager</i>	<i>Photocopies £50</i>
<b>Plan next phase</b>	<i>Bi-annually</i>	<i>Project Manager</i>	<i>None</i>
<b>Total additional costs</b>	<i>£1,650</i>		

<b>Reports</b>	<b>For whom</b>	<b>Format and content</b>	<b>Frequency, forum and deadlines</b>
<b>Bi-annual report</b>	<i>Board, staff</i>	<i>Max 10-page report + powerpoint with main headlines</i>	<i>Twice per year, Board meeting (1/1/06); Staff email HODs and FOH briefing</i>
<b>Quarterly User-Stats</b>	<i>ALG</i>	<i>Users and audiences broken down by borough</i>	<i>Dates:</i>

## Sample Questionnaire

On the following pages is an example questionnaire for self-completion. It provides a template you could adapt for your own purposes. You can download a blank version of this questionnaire from [www.audienceslondon.org](http://www.audienceslondon.org)

In this case, the organisation is interested to differentiate between regular audiences and newcomers, and between experienced arts attenders and others, as well as getting feedback on its own activities and understanding more about the identity of their audience.

## XXX name of organisation

Today's Date: \_\_\_/\_\_\_/\_\_\_ Activity: \_\_\_\_\_

*We are carrying out a survey to get to know more about our audiences and to understand how well you and other members of the public are being served.*

*We'd be delighted if you could spare 5 minutes to answer some questions. As a thank you, you can opt to enter your name into a prize draw to win 1 of 3 £50 Amazon vouchers. Find out what we do as a result of audience feedback at [www.xxx.org/feedback](http://www.xxx.org/feedback).*

*Your answers will be kept confidentially and only will be used by XXX for research and development purposes. You will not be added to mailing lists or receive junk mail as a result.*

### About our work

Q1 Have you seen/ visited XXX before? *Please tick one box only*

- Yes       No       Don't know

Q2 If yes, about how many times had you visited in the past two years? *Please tick one box only*

- Once       Twice       Three or more times

Q3a What made you decide to go to this performance? *Tick as many boxes as apply*

- I like coming to the XXXXX       I have a professional involvement  
 I like the work of XXXX       It was recommended by someone  
 I found the description interesting       Other (please specify) \_\_\_\_\_

Q3b And which would you say was your **main** reason for deciding to go to this performance?

**Circle** your main reason in the above list

Q4 Which (if any) of these activities have you done or tried in the past two years?

*Tick as many boxes as apply*

- Attended a theatre       Attended other live music  
 Attended a cinema       Attended an art gallery music  
 Attended classical music       Read a book for pleasure  
 Attended dance       Performed or created art

Q5 How would you rate your experience of the following? *Please give one tick for each statement*

	Very good	Good	Neither	Poor	Very Poor	N/a
Information about the event before booking	<input type="checkbox"/>					
Information to plan your visit	<input type="checkbox"/>					
Convenience of location	<input type="checkbox"/>					
Signs and information in venue	<input type="checkbox"/>					
Accessibility of venue	<input type="checkbox"/>					
How welcoming staff were	<input type="checkbox"/>					
Bar or café facilities	<input type="checkbox"/>					
How enjoyable the event/exhibition was	<input type="checkbox"/>					
Value for money	<input type="checkbox"/>					
The whole experience	<input type="checkbox"/>					

Q6 Please rate the importance of the following elements when finding out about this event and booking your tickets/ planning your trip. *Tick one box for each*

	Very important	Quite important	Not important	N/A
A brochure or leaflet through the post	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A brochure or leaflet I picked up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listings (for example, Metro, Time Out)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A preview/review in the press/ media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal recommendation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information on the XXXX website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email received from XXXX	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please explain)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q7 Do you use, or have you used in the past, any of our access services? *Tick as many boxes as apply*

- |   |  |
|---|--|
| <input type="checkbox"/> Large print                      | <input type="checkbox"/> Sign-interpreted performances |
| <input type="checkbox"/> Audio-tape                       | <input type="checkbox"/> Induction or infra-red loop   |
| <input type="checkbox"/> Lift/ other wheelchair provision | <input type="checkbox"/> Surtitles                     |
| <input type="checkbox"/> Other (please explain)_____      |  |

Q8 Do you have any suggestions of access services you would like us to provide? *Please describe below*

Q9 Do you use, or have you used in the past, any of our participation services?  
(Tick as many boxes as apply)

- Mailing list
  Family Open Days  
 Youth theatre
  Talks and debates  
 Other (please explain) \_\_\_\_\_

Q10 Do you have any suggestions of services you would like us to provide? *Please describe below*

Q11 Is there anything else you would like to say about your experience or our work? *Please describe below*

### About You

Your answers to these will help us to understand if we are offering an equally good service to everyone in our community.

Q12 Are you...  Male  Female

Q13 How old are you?  Under 16  16-19  20-24  25-34  
 35-44  45-54  55-64  65 or over

Q14 Do you consider yourself to be... *(please tick one)*  Deaf  Disabled  Neither

Q15 How would you describe your ethnic origin? *Please tick one description (as recommended by the Commission for Racial Equality) with which you identify or write in another answer.*

<b>White</b> <input type="checkbox"/> British <input type="checkbox"/> Irish <input type="checkbox"/> Other White – <b>please state</b>	<b>Mixed</b> <input type="checkbox"/> White & Black Caribbean <input type="checkbox"/> White & Black African <input type="checkbox"/> White and Asian <input type="checkbox"/> Other Mixed – <b>please state</b>	<b>Asian/Asian British</b> <input type="checkbox"/> Indian <input type="checkbox"/> Pakistani <input type="checkbox"/> Bangladeshi <input type="checkbox"/> Other Asian – <b>please state</b>
<b>Black/Black British</b> <input type="checkbox"/> African <input type="checkbox"/> Caribbean <input type="checkbox"/> Other Black – <b>please state</b>	<b>Chinese/Other</b> <input type="checkbox"/> Chinese <input type="checkbox"/> Other – <b>please state</b>	
<b>Please state if ticked any 'Other' category ...</b>		

Q16 Where do you live?

London – go to Q17

Other UK – go to Q17

Overseas – go to Q18

Q17 What is your full UK post code? *We use this data to see where our visitors are coming from. This information will not be used for any marketing and will not be passed to any third party.*

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Q18 (If living outside of the UK) in which country do you live?

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Q19 Would you like to be entered for the free prize draw?

Yes

No

*The closing date for the free prize draw is XXXX . The winner will be notified by telephone or email within 14 days of this date. The prize of one £50 Amazon voucher is non-exchangeable.*

Q20 Would you like to take part in further discussion about our services?

Yes

No

Q21 If you answered 'Yes' to question 19 or 20, please complete your details below.

First Name
Last Name
Address
Postcode
Telephone
Email

By providing your contact details you are consenting to be contacted by XXX (*also include names of other organisations' if appropriate*) regarding the free prize draw and/or further discussion if you have ticked 'Yes' in questions 19 or 20. We will not pass on any personal details to third parties, and will only use your contact details for the purposes detailed above. All data will be treated in accordance with the Data Protection Act 1998.

**Thank you very much for taking part. If you would like any information about this survey, or have any questions or concerns, please contact us on XXX XXX XXX**

## Some Notes on Sampling

Sampling refers to the collection of responses to your survey that are going to be used to **represent your entire audience**. There are lots of ways in which the questionnaire can be conducted with might mean that the people that respond aren't very representative of the whole audience – these issues are addressed in sections 2. Collecting Information and The Questionnaire pages 15 to 21). The other issue is **how many** responses you need to collect, which we explain how to calculate here. This issue relates to statistical theory, which is not easy to explain in a general-purpose guide – your local audience development agency, or any specialist researcher, should also be able to advise you.

Longer explanations of sampling are provided in the Audience Data UK A-Z of **Commonly Used Terms**, downloadable from [www.aduk.org](http://www.aduk.org), and in **Commissioning Market Research** by Liz Hill, published by the AMA. The tables provided below should provide you with a simple reference point.

The first issue to raise is that it is counter-intuitive but true that the size of sample that you need to represent your audience does not relate to the size of your total audience, once the sample (and your audience) are in three figures. This means that a sample of 200 works just as well for a total audience of 1,000 as it does for an audience of 10,000.

There are two main issue when thinking about how big a sample you will need – how confident you want to be of the answer, and how big the difference between the really important answers might be. For example, if you were considering offering an additional service at relatively low cost, your level of confidence would not need to be that high to make the decision, and you would not necessarily need to see a big difference in those answering yes or no to the question. On the other hand, if you were thinking of changing the starting time of all performances, you would probably want to be very confident that your audience supported it, and the result might be quite close run. The more confident you want to be, and the closer the result, the bigger a sample you need.

The tables here relate to the fact that that what you are researching is a sample of your total audience, and not all of them (which would be called a census). Even if your data collection techniques meant that your sample were as good as it could possibly be, you can't be 100% certain that your entire audience would give the same answers – in fact, you couldn't be at all confident of getting EXACTLY the same answers, but you could be pretty confident of getting answers that are quite close to the answers you get from your sample, and the following tables enable you to quantify HOW confident you can be and HOW close the answers. The confidence percentage tells you how sure you can be (both tables are calculated on the basis of 95% confidence, which means that you would be right 19 times out of 20), and the margin of error tells you how close the true answer is likely to be.

So if you know how many responses you got or plan to get (the sample size) and you know what answer you got (the finding) then the following table allows you to calculate your margin of error (the +/- figure):

finding (%)	Sample Size		
	100	250	500
5	4.3	2.7	1.9
10	5.9	3.7	2.6
20	7.8	5.0	3.5
30	9.0	5.7	4.0
40	9.6	6.1	4.3
50	9.8	6.2	4.4
60	9.6	6.1	4.3
70	9.0	5.7	4.0
80	7.8	5.0	3.5
90	5.9	3.7	2.6
95	4.3	2.7	1.9

For example, if you had a sample of 100 responses, and 80% of them said they found out about your show through a website, whereas 20% said they had seen an advert, both these figures would have a margin of error of 7.8%. Adding 7.8% to 20% give you 27.8%, and taking it away from 80% gives you 72.2%, so you could be 95% confident that this difference is statistically significant: more people had used your website than had seen the advert. If, however, the answers had been 40% and 50%, the difference between the figures is less than the margin of error, so there would be no statistically-significant difference between them.

The following table allows you to work out how big a sample size you might need, if you have some idea of what answer you will get (the expected finding) and you have decided how big a difference you will need to see in order to make a decision that you might be contemplating (margin of error).

expected finding (%)	Margin of error		
	± 2%	± 5%	± 10%
5	456	73	18
10	864	138	35
20	1537	246	61
30	2017	323	81
40	2305	369	92
50	2401	384	96
60	2305	369	92
70	2017	323	81

<b>80</b>	1537	246	61
<b>90</b>	864	138	35
<b>95</b>	456	73	18

For example, let's say that you are planning research and want to find out whether customers attending a particular festival are more diverse than customers attending your regular programme. If you know that for your regular programme 80% of the audience are White British (from a sample size of 250), but are hoping that for the festival this will drop to 60%, then a sample of at 92 festival attenders will be big enough to give you a statistically significant difference. However, if you were only aiming for a change of 2% in the audience, you would need a sample of over 1,500 to find out whether this had been achieved with statistical significance.

You will see at this point that smaller sample sizes can work well for measuring big differences, but not small ones. It is possible to work at less than 95% confidence – this is the generally-quoted figure, but of course for vital research (for example, testing new drugs) higher levels of confidence will be used, and for less life-or-death research lower levels can be used. This will reduce the sample sizes required - speak to your regional audience development agency or a research specialist to explore this. Alternatively, if research has been carried out which shows a difference which is not statistically significant, other ways of exploring the issue can be found to discover whether there is a problem (see p 32).

## FAQs

*The questions below are some that came up during the process of researching and writing these guidelines. They are not intended to be definitive – we will update them in future versions of the guidelines, and if you have further question do please get in touch via [www.audienceslondon.org](http://www.audienceslondon.org).*

### **People are offended by being asked questions about their ethnicity and so-on - surely we'd be doing more damage than good?**

Our study, as well as the advice of the CRE and research by the Office for National Statistics, shows that this is not often the case, and that people are used to being asked for this information. What is important is that you ask for it in the right way, and that you explain clearly why you are collecting the information and the positive impact it should have.

### **Any kind of research only ever tells you what you knew already - is it really worth it?**

The real value of audience monitoring is to challenge your own assumptions - it's about respecting difference. And it's important that you design the research so that you don't only hear from the audience members whose views you already know. If the results prove that you know your audience well, so much the better. If it tells you something new, you are in a position to make changes accordingly. Research which only serves to "prove" your point has been badly designed.

### **Should you use tick-boxes or let people fill in their own answers**

Use tick-boxes; if you don't you will make assumptions about what their free response answers mean, and in effect deny respondents the opportunity to "self-identify", see p22.

### **Can you survey you audience too much? What about "questionnaire fatigue"?**

AL's information about audiences in London suggests that most people attend less often than we think. Anecdotally, in our experience of conducting audience surveys for cultural organisations across London, we rarely get negative feedback. If you adopt the regular survey approach recommended, it is possible that some of your core attenders may feel over-surveyed – you could address this on questionnaires, and in communications with regulars. However, if you ask individuals for their responses, rather than leaving out surveys for everyone to complete, then this is less likely to impact on regular attenders.

### **Our local communities are not properly represented in the census categories, what should we do?**

You can add "sub-categories" but they should fit within the existing Census umbrella categories, so that you can add this group into overall totals. For example, an additional "Sri Lankan" category could be added to the South Asian category because this does not cut across any of the existing categories. There are other issues however - see p 24. Your local authority may have already been through these issues and come up with specific ethnic groups for their residents, they may be a useful source of advice.

**By putting labels on people and drawing attention to differences between them, aren't ethnic records likely to do more harm than good, or even be unlawful?**

The CRE says: *"Labelling people, and differentiating between them according to their racial or ethnic origin is already a fairly common practice in society, and has developed irrespective of ethnic record-keeping. Racial origin, like gender, is a matter of fact. It is not, therefore, unlawful to label people. However, it is unlawful to treat people unfairly because of that label. Ethnic records should therefore be seen as an essential tool in achieving racial equality, because without them, it would be difficult to establish the nature or extent of inequality, the areas where action is most needed, and whether measures aimed at reducing inequality are succeeding"*

## Reading and Resources

### **Action for Access**

Arts Council England's practical resource pack for arts organisations wishing to make their activities more accessible to disabled people; download it from [www.artscouncil.org.uk/publications](http://www.artscouncil.org.uk/publications)

### **ADUK**

Audience Data UK aims to help arts organisations to make use of information about audiences. Its website contains extensive advice on data terms and standard protocols commissioned by the UK arts councils: [www.aduk.org](http://www.aduk.org)

### **Audience Development Agencies**

More information about the UK's 16 regional agencies [www.audiencedevelopment.org](http://www.audiencedevelopment.org). In London: [www.audienceslondon.org](http://www.audienceslondon.org)

### **Commission for Equality and Human Rights**

From October 2007 the new, combined commission will, "promote equality and tackle discrimination in relation to gender, gender reassignment, disability, sexual orientation, religion or belief, age, race and promote human rights". It will replace the Commission for Racial Equality and the Disability Rights Commission.

<http://www.cehr.org.uk/>

### **Commission for Race Equality**

For advice on a range of Race equality issues, including monitoring. See also Commission for Equality and Human Rights.

[www.cre.gov.uk](http://www.cre.gov.uk)

### **Disability Rights Commission**

For advice on a range of Disability equality issues, including monitoring. See also Commission for Equality and Human Rights.

[www.drc.gov.uk](http://www.drc.gov.uk)

### **Ethnic group statistics: A guide for the collection and classification of ethnicity data**

Office for National Statistics. Available to download from their website, covers how to ask questions about ethnicity and national identity.

[http://www.statistics.gov.uk/about/ethnic\\_group\\_statistics/downloads/ethnic\\_group\\_statistics.pdf](http://www.statistics.gov.uk/about/ethnic_group_statistics/downloads/ethnic_group_statistics.pdf)

### **Ethnic Monitoring – A guide for public authorities (Non-statutory)**

Commission for Race Equality. Available in hard copy or to download from their website, which covers this

area in great detail and is recommended for those wanting a deeper understanding of the subject.

[www.cre.gov.uk](http://www.cre.gov.uk)

### **Guide to commissioning research**

By Liz Hill, published by the AMA [www.a-m-a.co.uk](http://www.a-m-a.co.uk)

### **Guide to presenting research findings**

From South West Arts Marketing; downloadable from [www.swam.org.uk](http://www.swam.org.uk)

### **Market Research Society**

[www.mrs.org.uk](http://www.mrs.org.uk) For advice and guidelines on good research practice.

### **MLA Toolkits**

The MLA produces a number of resources and toolkits supporting organisations to develop policies on access, diversity and disability [www.mla.gov.uk](http://www.mla.gov.uk). In London: [www.mlalondon.org.uk](http://www.mlalondon.org.uk)

### **Monitoring: how to monitor sexual orientation in the workplace.**

Stonewall. Available to download from their website [www.stonewall.org.uk](http://www.stonewall.org.uk)

### **Navigating Difference**

An Arts Council England publication exploring issues of diversity and audience development. Commissioned by Arts About Manchester, Audiences Central, Audiences London and Audiences Yorkshire, edited Heather Maitland etc. Available in hard-copy from these agencies and from ACE; it can also be downloaded from [www.newaudiences.org.uk](http://www.newaudiences.org.uk)

### **Office for National Statistics**

For a wealth of demographic information about the UK population, much of it broken down by region. It might be useful to get some expert advice on accessing the full range of resources. [www.statistics.gov.uk](http://www.statistics.gov.uk)

### **Respond**

Arts Council England's practical resource for developing a race equality action plan; download it from [www.artscouncil.org.uk/publications](http://www.artscouncil.org.uk/publications)

### **Shape**

For advice on disability arts and access issues, services include training, access audits and "mystery shopping" [www.shapearts.org.uk](http://www.shapearts.org.uk)

## Glossary

<b>ADUK</b>	Audience Data UK, an initiative of the Arts Councils of England, Northern Ireland, Scotland and Wales, aiming to help people who work in the arts to make use of data and information about audiences by providing guidance and clarification on collecting, processing, analysing and interpreting data. Commissioned <i>A-Z of Commonly Used Terms and Protocols</i> , See <a href="http://www.aduk.org">www.aduk.org</a>
<b>Benchmark</b>	A point of reference for measurement, often used in order to measure progress or compare similar items.
<b>Catchment area</b>	The geographic area that is the source of the largest and most important proportion of actual users for an event, series of events, organisation, or facility.*
<b>Census</b>	In research/scientific terms, the collection of information about all items in the population (not necessarily human – it could be deer, bacteria or rock formations). Commonly used to refer to a periodic gathering of information conducted by governments of the inhabitants of their territory. In the UK, this is conducted by the <i>Office for National Statistics</i> every ten years, and the next is due in 2011. See <a href="http://www.statistics.gov.uk/census">www.statistics.gov.uk/census</a>
<b>Census categories</b>	The categories that the <i>Office for National Statistics</i> use when asking the population to describe themselves. The <i>ONS</i> is a major conductor of social research, and regularly tests questions and categories with members of the public and organisations such as the <i>CRE</i> , <i>Stonewall</i> and the <i>Disability Rights Commission</i> . Because of this, and because they are the source of most <i>benchmark</i> information about the UK population, it is usually preferable to follow questions and categories as used in the census.
<b>CRE</b>	The Commission for Racial Equality
<b>Cross-tabulation</b>	Breaking down of quantitative analysis of survey results or other information by two variables at once – for example, reporting on the average frequency of attendance of survey respondents according to their ethnic group
<b>Diversity</b>	See Introduction

<b>DRC</b>	Disability Rights Commission
<b>Geo-demographic profiling</b>	Demographic profiling is a statistical representation of the groupings within a market, community or area, classified according to considerations such as age, social grade, economic status and life stage.* Geo-demographic profiling is the profiling of customers according to the profile of the postcode that they live in, built up from data from the <i>Census</i> and other sources. The two most common commercial profiling tools are Mosaic and ACORN.
<b>LGBT(Q)</b>	An acronym used to describe the Lesbian, Gay, Bisexual and Transgender population (as using any of the terms on their own is not inclusive). Sometimes the Q for Queer is added, which has been reclaimed by some to mean people that reject cultural norms in terms of sexuality and/or gender.
<b>Mapping</b>	In this context, using a database of (for example) customer records with postcodes or other geographic identifiers within specialised software to produce a visual representation of the location or penetration of audiences in a geographical area.
<b>Monitoring</b>	The ongoing collection of information to enable an organisation to assess whether or not it is meeting its objectives and the efficacy of its systems and services, and to adjust and adapt them.
<b>Mosaic</b>	A commercial <i>geo-demographic profiling</i> tool available from Experian, which many audience development agencies use to understand the characteristics of audiences for different venues, artforms and regions.
<b>Office for National Statistics (ONS)</b>	The government department that collects and distributes key economic and social statistics in the UK, including the <i>Census</i>
<b>Qualitative research</b>	Research where the outputs are descriptive, seeking find out why, and where analysis is subjective and interpretative. Usually conducted via interviews or focus groups
<b>Quantitative research</b>	Research where the outputs are numerical, seeking to find out how many, where the analysis (attempts to be) objective. Usually conducted by questionnaire. Note that quantitative research can ask questions of a qualitative nature eg how much did you enjoy you visit, with a range of answer from a lot to not at all, for example.

<b>Sample</b>	An extract from an overall population, usually used as a part of a survey or analysis exercise.
<b>Self-definition</b>	Whereby a respondent indicates their own identity without a data-inputter or analyst assigning them an attribute or category. To make sure that people can “self-define”, use a mixture of multiple-choice tick boxes and options to write-in in a questionnaire.
<b>Statistically significant</b>	A difference thrown up by a survey that is very likely to be due to more than chance. If the difference between two figures is within the margin of error (which is related to the sample size) then it is statistically significant – the bigger the sample, the more likely the results are to be statistically significant (providing the research has been designed well). See 3.3 Sampling above.
<b>Trend</b>	Changes measured over time

*\*From A-Z of Useful Terms and Protocols*

## Background

While Arts Council England has provided funding and encouragement for their development, these Guidelines were produced independently by Audiences London. This draft version has been circulated to a number of expert readers, including ACE officers and legal advisers, and arts practitioners.

The Guidelines were developed by Audiences London with the help of a **Steering Group** which included representatives from Bhavan Centre, Hackney Museum, Hampstead Theatre, London Philharmonic Orchestra, Sadler's Wells, The Showroom gallery, Watermans Arts Centre, Whitechapel Gallery, officers from ACE London, MLA London and the Association of London Government, and researcher Irna Qureshi.

As part of the project, Audiences London researched what was considered good practice in other sectors, tested different approaches to audience monitoring with steering group organisations, explored the ways in which organisations are using monitoring information to develop their plans, and carried out qualitative research with audiences about their reactions to being asked for personal information.

We also draw on an Audiences London survey of audiences at disability arts events which aimed to test approaches to "accessible research" and as a result surveyed an unusually high number of disabled attenders.

### **Audiences London**

is the audience development agency for the region. We are a not-for-profit organisation funded by Arts Council England, London Councils and 90 subscribing cultural organisations. Like our sister agencies across the country, Audiences London exists to enable cultural organisations to increase the size and diversity of their audiences and to develop practice in the field. We provide market research and intelligence, advice and information for audience development, workshops and networking opportunities and act as a catalyst for collaboration. We also manage a range of projects testing and establishing new or joined up approaches to audience development [www.audienceslondon.org](http://www.audienceslondon.org).

Audiences London can help any cultural organisation in London with any stage of the process suggested in the Guidelines - contact us on 020 7407 4625 [info@audienceslondon.org](mailto:info@audienceslondon.org). Subscriber organisations are also invited to use our (free) monitoring advice line - just call us.

### **Organisations outside London**

should contact their local audience development agency for further support: find out where at [www.audiencedevelopment.org](http://www.audiencedevelopment.org)

## **Acknowledgements**

Thanks to those whose advice and comments have contributed to the development of these Guidelines, including:

Rhiannon Cackett, Hackney Museum  
Samantha Fores, Commission for Racial Equality  
Paula Ghosh, formerly London Councils  
Kingsley Jayasekara, Sadlers Wells  
Ben Jeffries, formerly Arts Council England, London  
Nick Lane, formerly MLA London  
Rachel Mapplebeck, Whitechapel Art Gallery  
John Muir, Bhavan Centre  
Irna Qureshi  
Karen Roberts, Connect Research  
Richard Scandrett, formerly Hampstead Theatre  
Emily Smith, London Philharmonic Orchestra  
Penn Trevella, formerly Watermans Arts Centre  
Alexandra Tomkinson, Arts Council England, London

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