WHO'S COMING?

RESPECTFUL AUDIENCE SURVEYING TOOLKIT

sloverlinett AUDIENCE RESEARCH

KNIGHT FOUNDATION

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Introduction

Do you know who's coming to your events and programs – and who isn't? Most cultural and civic institutions don't have high-quality data on participants. For many, collecting demographic data sounds intimidating, expensive, and complicated.

We've felt this pain. We've worked with funders and consultants to design scientifically-valid survey methods. We've agonized about how to ask sensitive questions about race or class to perfect strangers. And we've struggled to capture data with staff and volunteers—none of whom are professional researchers or data analysts.

But we've also seen the incredible benefit of having good demographic data on our participants. We've seen it smash assumptions and stereotypes. We've seen it change conversations with trustees and funders. We've seen it influence program decisions.

And so we came together—a group of practitioners from OF/BY/FOR ALL and researchers from Slover Linett Audience Research—to write this toolkit.

We wrote this kit to give you an easy, step-by-step guide to collecting high-quality participant data. You can use it to create a plan, build a survey, and start collecting data right away. What gets measured gets done. When you measure demographic data, it accelerates your ability to make positive, inclusive change.

Here's what you'll get by using this toolkit:

- A practical guide to collecting audience data at live events
- A survey template and question bank to help you construct a respectful and culturally-sensitive demographic data survey
- Tips and tools so you can ensure that the data you capture is reliable and of high quality
- Empowerment for you, your team, and volunteers to collect audience data in a variety of settings
- A catalyst for conversations about who is and isn't participating with your organization

Why collect data

We hope this toolkit can help you better understand **who is** and **who isn't** engaging with your organization—so you can make informed decisions about how to involve diverse communities in your work.

Some things to keep in mind:

- There are many ways to use data to improve your organization. This toolkit specifically focuses on collecting high-quality demographic data via participant surveys. This method is often called an "intercept survey," because you are intercepting participants to ask them to complete the survey.

- We're focusing on intercept surveys because we believe—after years of research and on-the-ground experience—that this is the most reliable way to collect high-quality data about your audience. Surveys conducted live, in-person, with a random sample are more to reach your full audience than other methods like email or post-event surveys.

- Collecting high-quality data doesn't have to cost more or be overly complicated. It just requires a few specific approaches—which you'll learn in this toolkit.

Collecting high-quality demographic data will help you:

- **Challenge or confirm** your assumptions in a systematic way
    - Find out who is coming to your events or programs
    - Find out who isn't coming (at all or as much as you'd like)
- **Measure any change** when it comes to who is and isn't coming
    - Are your efforts paying off? Does something need to change?
- **Get feedback, input and ideas** about your programming directly from your participants
    - Take some of the guesswork out of program development

What you'll need to get started

Anyone can collect audience data. (Really!) You don't need any particular credentials, specialized software or analytical tools. You don't need months of preparation. All you need is a sincere interest in learning more about the people in your community—both those who do and do not participate with your organization.

Here's what you need to bring to the table:

- **An audience, participants, or visitors**: You probably have many of these.
- **A team**: We recommend developing your data collection plan with a team of 1-3 colleagues. You will also need 1-3 "fielders"—people who will actually administer the survey. These individuals can be staff or volunteers, whatever works for you.

Here's what you'll build with this toolkit:

- **A data collection plan**: Part 1 of this guide walks you through the steps to collect participant data at your specific type of event or program.
- **A survey**: Part 2 of this guide provides a template and sample questions to help you construct a demographic survey for your context. You can distribute your survey on paper, or you can use tablets or smartphones with an online tool like SurveyMonkey.

Make Your Plan

Before you start collecting data, you'll need to do five things:

- Get clear on your goal
- Choose a date or event to try out surveying
- Recruit a team to conduct the survey
- Decide how to conduct the survey
- Write your survey

Your Goal: Collect high-quality data

To get good data, you don't need to talk to everyone in your audience. You do need to talk to a **representative subset** of your audience members—what we typically call a "random sample." The random sample is a gold standard in research and is a systematic approach.

- You'll be aiming to approach and get data from a randomized (and therefore representative) selection of people in your audience.

- This is the most accurate method of learning about an audience when it's not practical or cost-effective to reach everyone. It provides the best representation of your audience, even if you don't survey lots of people or if your response rate is low.

- It's not hard to collect a random sample, but you do have to train your team intentionally to do so. We'll get into the details in the next section.

Pick your First Event to Try Surveying

Pick a day or event in the next month that makes sense for your team—giving you enough time to make a plan but not so much time you lose momentum.

Here are **two common types of events or activities** where you'll find your audience. Choose the one that fits your context. You'll come back to this decision throughout your planning.

A multi-focus event	
GENERAL VISITATION **FESTIVALS** **FAIRS** **ALL-DAY EVENTS**	Your audience can come and go as they please within a specific period of time Could be ticketed or non-ticketed Audiences have many choices on what to focus their attention on On-going opportunities to collect data

For a multi-focus event, you need 1-2 fielders at a time, collecting surveys continuously. These fielders will stand in strategic fixed locations, surveying people who pass by them. Plan to collect data for 1-2 hours as a starting point.

A fixed-focus event	
PERFORMANCE **LECTURE** **DEMONSTRATION** **SCREENING**	Audience is focused on a single programming element during a specific, fixed period of time Could be ticketed or non-ticketed Limited opportunities to collect data

For a fixed-focus event, you need 2-5 fielders, collecting surveys at specific times (before the event, after the event, during intermission). You need more fielders in this circumstance as you have less time in which to administer surveys.

Build your team

Before you begin to collect data, you may want to **build a core team** to help in data collection—and to function as data ambassadors to audience members and to your internal team.

Who should I include on my planning team?

- We recommend that you work with 2-3 core collaborators.
- Try to invite internal collaborators who might use your audience data in different ways, so that can help you prioritize what you want to learn.

Who should I include on my fielding team (distributing surveys)?

- For your first attempt at data collection, you'll need 1-4 people to help distribute your survey.
    - If your event is a "multi-focus event," where participants roam around, you can station 1-2 fielders in fixed locations.
    - If your event is a "fixed-focus event," where participants all enter and leave at the same time, you may want 2-5 fielders to capture more data during those crucial moments before, after, and at breaks in the event.
- If you know that members of your audience are more comfortable with a language other than English, make sure to add multilingual team members to your fielding team.
- Double-check that all members of your fielding team will be available on the day that you're planning to do your data collection.

How do I help my fielding team know what to expect?

- You could share the relevant pages of this toolkit with your fielding team (especially those coming up that focus on ways to approach people, how to ask them to participate, and how to answer questions).
- Consider planning a training session where you talk through this toolkit with the members of your fielding team.

Choose your survey mode

You’ve got a date and a team. Now you need a survey. First, think about which **survey mode** (e.g. electronic or paper) might be easiest for you.

Online survey tool with tablets or smartphones (good free options include SurveyMonkey and Google forms)	
Requirements:	**Advantages:**
Time prior to data collection for programing your survey into the platform	No extra time needed for combining data from individual responses
A reliable WiFi network (most tools don’t provide offline sync)	No extra time needed to interpret individual handwriting or responses
A wifi-connected iPad, tablet, or smartphone for each fielder to use to collect survey entries	Easy analysis, as survey tools typically provide automatic tabulations of your results

Paper and pencil survey	
Requirements:	**Advantages:**
A double-sided printer	Quick to create and print
Paper, pens, and a clipboard for each fielder	More accessible to audiences less familiar with technology
Extra time for data entry into an online survey tool	Fewer tech issues (e.g., low batteries, etc.)
	Fewer queuing issues, i.e. waiting for a tablet to become available for the next person to take the survey

Write your survey

Now you're ready to create your survey. You can use OF/BY/FOR ALL's **Design Your Survey resource** in Part 2 to create a survey quickly using "best-practice templates" for demographic data. Keep the following points below in mind to ensure that your survey is appropriate for the random sample intercept method.

Strong intercept surveys are short and focused:

- Respect your audience's time—try to keep your survey between 3-5 minutes long.
    - Include **around 5-8** demographic questions (e.g., age, gender, race/ethnicity, home location, etc.)
    - Include **no more than 3** additional non-demographic questions based on the priorities of your research planning team (e.g., who people come with, why they came, how satisfied are they, etc.).
- Plan for every participant to answer the same questions.
- If you know that members of your audience may not be comfortable reading in English, consider creating additional versions of your survey in their preferred/primary language.
    - If it's not practical for you to create multiple language-versions of your survey, consider tracking how many people decline to take the survey because of a language barrier.

TRY IT!

Create your own version of a welcoming, inclusive, and accurate demographic survey by following our design guide **(Design Your Survey**). The guide starts on page 32 of this toolkit, in Part 2.

Collect Data

Some data is better than no data. Even if you don't yet feel completely confident in your data collection skills, we urge you to get out there and practice. Even professionals rely on a process of trial and error to figure out the most effective way to field a survey in a new environment.

This section will cover the following topics:

- Choose fielding locations
- Consider your audience's needs
- Approach people "randomly"
- Know what to say
- Be OK with "no"
- Be transparent
- Alternative approaches
- Troubleshooting

Choose fielding locations

Now comes the fun part...trying it out. First, you'll want to **choose fielding locations** at your chosen event where the majority of your audience will pass by, so that you can approach a random sample of people.

Single entry/exit point (fixed-focus or multi-focus event)	Station 1-2 fielders at the entry/exit (e.g., at the doorway or within a wait line) to intercept people as they progress through.
Multiple entry/exit points (multi-focus event or a larger building)	If you have enough fielders available, station 1 fielder at every entry/exit point, to intercept people as they progress through. If you can't cover all entry/exit points, station 1 fielder at each entry/exit that might represent a different sub-set of your audience (e.g., different-priced seating, different street access, etc.).
Unrestricted entry/exit points (e.g., an open-air event)	Observe traffic patterns and station 1 fielder at each location where a large number of people pass through or where people form lines (e.g., a bathroom, a hallway/passage a food line, etc.). This is a more challenging set-up, as there's a risk that you might miss people in your audience who don't pass by the locations where your fielders are (e.g. if you're stationed next to a bar/drink cart, you won't get anyone who doesn't drink).

Consider your audience's needs

When choosing locations to approach people, also consider the **comfort of your audience**. Try to anticipate audience needs in advance so that more people will say yes to completing your survey (e.g. a spot with shade on a sunny day).

- **Are you in a location where it would be easy to intercept a visitor?** People are more likely to agree to complete a survey if they are not actively engaged in another activity at the time. Transit areas and lines are a great time to catch people at down moments.

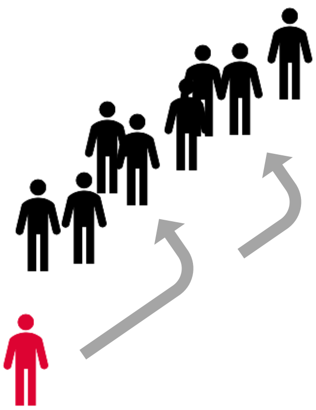
- **Is seating available for those who may be ready to participate but are uncomfortable standing?** If not, consider bringing some portable chairs or adjust your fielding spots to be closer to a bench.

- **Are you in a location that won't disrupt other people's experiences?** Double check that stationing people in fielding locations won't conceal important directional signage or block key traffic areas.

- **If your audience includes families with young children, can adults safely shift their attention away from their children?** Consider having fielders work in pairs, so that one person interacts with the adults in the group while the other provides a short activity for any children (e.g., a coloring book, a hands-on game, etc.).

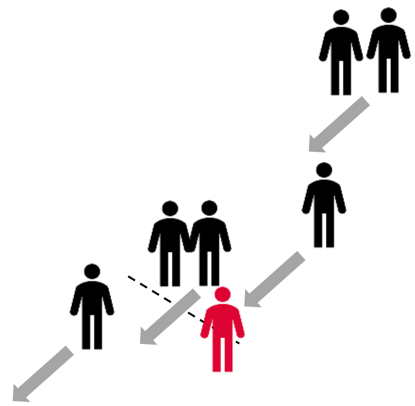
Approach people “randomly”

You don’t need to talk to everyone in your audience to understand who’s coming. You just need to be sure that you’re approaching a **random selection** of people—and this section gives you and your fielders tools to feel comfortable while making that approach. Even if you are only able to talk to a portion of the people at your event, using these methods will help make sure that they represent the variety of your audience.



Method 1: Follow the Line

Approach every “X” (third or fifth) person in the line



Method 2: Imaginary Line

Create an imaginary line on the ground, select every “X” (third or fifth) person who crosses your line

- Decide who to ask based solely on their order in your line; it can help to look at people’s feet rather than their faces.
- Choose only one member of each visiting party—if more than one person is at the same place in line, focus on the person closest to you.

Know what to say

Approaching people can feel intimidating, but it becomes easier once you **get some practice**. Plan what you and your fielders will say in advance to recruit audience members to take the survey.

How to make "the ask"

- Broadcast your legitimacy by wearing identification from your organization (e.g., a badge, pin, name tag, branded shirt, etc.).
- Approach people with a smile and confident tone to put them at ease.
- Mention your organization early, emphasize that the person's input is important to your organization.
- Give them a time estimate for the survey.

A SAMPLE "ASK"

"Hello, my name is________. My organization ____________________ is conducting a study to better understand who is coming to the event today. Your feedback is extremely valuable to _____________ and will make a difference in helping us improve our programs. The survey will only take about 3-5 minutes to fill out." Would you like to take part?

- Avoid the temptation to ask those who seem most available or approachable (e.g. someone who is smiling, or someone looks like your grandmother). Follow the plan to ask every 'X' (third or fifth) person to get the best coverage of visitors and reduce bias.
- When asking sensitive demographic questions, we recommend only allowing adults to complete your survey. If you suspect the person you're approaching is under 18, <u>still</u> approach them—if they are too young, thank them and begin your count again.

Be OK with "no"

You'll always have some audience members who will say "no" to taking a survey. That's OK. Other times, people just need a little more information to feel comfortable agreeing. It's important to have **a strategy** in advance for how you and your fielders will respond when someone says no.

Dealing with refusals

- If someone firmly says no, thank them with a smile and tell them to enjoy their visit—do not take it personally, it's going to happen.
- If someone is hesitant, they may just need more context to help them decide—use one of the follow-ups below to help them feel comfortable:
    - Tell them that they don't have to have any special knowledge.
    - Tell them that their participation is really important to helping your organization improve.
    - Tell them that it will only take 3-5 minutes.
    - Tell them that its anonymous, and you won't even ask them their name.

Be aware of your body language

- Avoid running after people and approaching them from behind; stay ahead of them when you approach them.
- Make direct eye contact when you approach someone, and don't forget to smile.
- Typically, there's no need to grovel or beg people to participate—people love to share their opinions if they can.

Be transparent

Some audience members may worry about sharing their sensitive personal data as they complete a survey. It's important to think about how you and your fielders can respond to questions to help **foster a good relationship** with your audience.

Responding to questions

- Some respondents will be curious about the purpose of the survey. Feel free to share a little bit about the goals with the visitors and how the data will be used (e.g. internal reports, applying for grant funding, etc.).

- Demographic questions can sometimes be sensitive, and it helps people to know how you'll use their data: "We'd like to learn more about who comes to events. This feedback will help _______________ to make sure we're meeting the needs of many different kinds of people." And, remind them that their feedback in anonymous ("We won't even ask your name!").

- Respondents may also be curious about you and your role at your organization. Feel free to share whatever is comfortable to you.

TRY IT!

Pick an event and an hour time slot, and distribute your survey.

Build your sense of learning together: try out different fielding locations, refine you "ask," and check in with your partners on what works and what to change

Reflect with your team:

- What did you learn?
- What do you want to learn now?
- Where do you want to go next?

Troubleshooting

if you're hearing a lot of "no, thanks," **reconsider your data collection plan**. You may need to adjust where you're located or how you approach audience members. This can also be an important moment to take a pause and think about whether you're missing out on hearing from some portion of your audience (e.g., busy families with young children).

Things to consider

- Are your audience members feeling rushed (e.g., last 30 minutes before the institution closes or 5 minutes before the performance)?
- Are your fielders standing in an inconvenient spot (e.g., in the middle of a busy traffic area, no seating in sight, too loud)?
- Are you hearing "no" from one kind of audience member more than others (e.g., families, people of color, elderly people, etc.)?

Ways to adjust

- Try out some different locations to see how they compare.
- Make sure that you're fielding your survey at different times of day (or at different times during your event).
- Practice your "ask" on other staff members or volunteers to build confidence.
- Look around and think about anything that might be skewing who is saying "no." There are lots of ways to make taking a survey easier for audiences with particular needs (e.g., offering portable seating, toys for younger children, a more private setting, etc.).
- Consider offering people who complete your survey a small, low-cost thank-you gift (e.g., a pencil, sticker, magnet, etc.) as a token of appreciation.

Ensuring Accessibility

When intercepting people in your audience, make sure not to skip those who may appear to have a disability. And in order to obtain survey responses that are truly representative of your audience, it is critically important to **provide accommodations** that can help make your survey as accessible as possible.

Things to consider

- When intercepting people in your audience, make sure to include every single person in your “random” count (e.g., every “X” person in line), even if they may have a disability – don’t skip someone just because they may appear to be more difficult to speak with.
- Don’t make assumptions about people’s capabilities – instead, first ask them directly WHETHER they’d like to participate, and then provide options for HOW they might participate if you think that they may need extra accommodations.

Potential accommodations

- If someone is not able to read your survey easily (e.g., they have a visual disability) or if they cannot manually complete the survey (e.g., they have a mobility disability), feel free to offer to read the survey aloud to them – they can verbally provide their answers, and you can help fill the answers in.
    - To minimize privacy concerns, make sure to verbally remind respondents that all questions are voluntary and that *they can skip any question* that they don’t feel comfortable with.
- No matter what kind of disability someone might have, don’t assume that they cannot understand you – just speak normally. But if you’re having trouble understanding someone, just let them know and ask them to confirm, to repeat, or to describe things in a different way. It’s ok to double-check, because you want to make sure that you record each survey response accurately.

Alternative approaches

Sometimes it can make sense to collect audience data from **every member of your audience** rather than from a subset of people, especially if the event is small. Consider the following criteria to determine whether this method is appropriate for your needs.

Consider surveying every person in your audience if…

- …it won't strain your resources (e.g., a small event or a fixed entry point on slow days).
- …you'd like to offer every attendee the opportunity to share their thoughts (e.g., feedback for a 20-person class).
- …there's a clear moment in time when you can ask everyone to fill out a survey.
- …you expect that almost everyone will agree to complete a survey.

Methods to collect data from a full audience include:

- A facilitator passes out a paper survey to all audience members to complete it at a specific time.
- A staff member at a fixed location (i.e. a front desk) distributes a survey to each participant who enters the space.
- A survey is included in an event brochure or pamphlet, with a moderator/facilitator who asks all audience members to complete it at a specific time and hand it back in once completed.
- Designating a specific moment for people to complete a survey is important—if you require people to complete a survey in their own time, you risk introducing bias into your audience data, as some kinds of people are more likely to take their own time to do a survey than are others (e.g., people who are highly affiliated/satisfied/dissatisfied are more likely to respond to a survey on their own time).

Zoom Out (to a full audiene picture)

Now that you've tried out data collection at one or two events, you may be ready to expand your efforts to collect data across multiple experiences and at different points in time. With more data, you'll be able to build a robust understanding of your audience. You'll need to develop a data collection strategy that is specific to the types of events or activities at your organization.

This section will cover the following topics:

- Events across multiple days
- Program series with multiple events
- Regular visitation/attendance across the year
- Know when you have enough data

Events across multiple days

Now that you've practiced collecting a random, representative sample of your audience at one event, you can use the same methods to understand audiences for events lasting **multiple consecutive days** (e.g., a festival). You don't need to collect audience data at every moment to get a snapshot of your audience—but you do need to select days and times that stretch across a variety of experiences of your event.

Sample across different kinds of days

- If your event spans both weekday and weekends, make sure to collect data during at least one day of each.
- If your event is outside and subject to weather, document the weather each day with your data set so you can later understand the impact of weather on attendance (e.g., hot/cold, sunny/cloudy, etc.).

Sample across different times of day

- Divide your event into time periods where you anticipate different kinds of audiences (e.g., daytime/nighttime audiences).
- Consider collecting data during different time periods—and try to spread out your data collection time in equal proportions (e.g. one hour with two data collectors in the morning and the same in the evening).

Example Schedule for a four-day event

Thursday	Friday	Saturday	Sunday
Collect data: 10am – 1pm 4pm – 7pm	Collect data: 12pm – 3pm 6pm – 9pm	Collect data: 10am-1pm 4pm – 7pm	Collect data: 12pm – 3pm 6pm – 9pm

Program series with multiple events

If your organization hosts events as part of an ongoing series, you may not have the resources available to collect data at every event. That's OK. You can use the strategies below to balance your data collection efforts, so that you collect audience data at **a roughly representative subset** of your events.

Sample across different categories of events

- If you have the resources available, or if you feel like you need more survey responses, you can collect audience data at every event (e.g. "census sampling").
- If it would be a challenge to collect data at every event, think about the range of content, formats, and audiences for the events in your series—is every event relatively the same, or do they aim to attract different kinds of audiences?
- Divide the events in your series into rough sub-categories for each different format (e.g., paid/free, indoor/outdoor) and core audience of focus (e.g., families/adults, younger adults/older adults). Aim to collect audience data from at least one event of each sub-category.

Example schedule for a program with five events

Event #1	Event #2	Event #3	Event #4	Event #5	Event #6
Format: Performance Audience: Family **Collect data**	Format: Performance Audience: Adult **Collect data**	Format: Performance Audience: Family SKIP	Format: Workshop Audience: Adult **Collect data**	Format: Workshop Audience: Adult SKIP	Format: Workshop Audience: Family **Collect data**

Regular visitation/attendance across the year

Regular visitation or attendance (e.g., at a museum, library, or park) can be a little more challenging, because you'll need to create a random sampling plan across **a number of different time frames** (e.g., time of day, day of week, seasons).

Sample across multiple seasons

- If you think your audiences primarily differs between the summer vs. the schoolyear, make sure you collect data across both portions of the year.
- If you're unsure about differences in your audiences across the year, consider three or four rounds of data collection (e.g., spring, summer, fall, winter).
- For each round of data collection, make sure to choose a variety of days of week and times of day but, if say a Tuesday & Wednesday are similar in programming, you may not have to collect from both.
- If you have rotating exhibitions or a rotating program season, document what program was on while data was being collected that day.

Example two-season schedule (one week in July / one week in November)

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Collect data: 10am-3pm	SKIP	Collect data: 10am-3pm	Collect data: 10am-3pm	Collect data: 3pm-7pm	Collect data: 3pm-7pm	Collect data: 10am-3pm

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Collect data: 10am-3pm	Collect data: 3pm-6pm	SKIP	Collect data: 9am-2pm	Collect data: 2pm-6pm	Collect data: 2pm-6pm	Collect data: 9am-2pm

Know when you have “enough” data

Often, there’s not a magic number of surveys that you need to collect in order to have “enough” data. But there are a few key factors to consider when to stop collecting data and when you should add a day or two of fielding. And if you absolutely need a starting rule of thumb, we recommend collecting data from **at least 20% of your audience**, with a minimum of 50 completed surveys per audience type.

Some context

- Depending on the size of your audience, the **percentage** of an audience that completes your survey may matter more than the **number** of surveys collected (e.g. collecting data from 50 people at an event of 100 people is different than collecting data from 50 people at an event with 2,000 people).
- In the world of statistics, there are best practices with respect to the recommended number of responses you need if you will be testing for “statistical significance,”—but that’s not the level of analysis we expect most organizations will use.

Helpful guidelines

- Here’s what collecting data from at least 20% of your audience—with a minimum of 50 people—could look like.
    - If you’re surveying one event, and it has an audience of 500 people, aim for around 100 completed surveys. If your event has a smaller audience, such as 100 people, aim for around 50 completed surveys.
    - If your audiences are small (under 100), and you’re collecting data across multiple events within a program type (e.g., 5 events in a program), you may want to collect at least 10 surveys at each event to reach a minimum of 50 completes per program.
- Remember: it’s great to get a higher response rate (over 20%) if you can, but it’s not necessary with your random sampling method.

Reflect & Share

Congratulations! We hope that this toolkit has set you on the path to gaining a better understanding of your audience. By knowing who you're engaging and who you're not, you'll be able to jumpstart conversations within your organization about how to serve your audiences better, or how to reach out in *new* ways to *new* kinds of audiences. It's important to make time and space for those conversations to happen.

This section will cover the following topics:

- Reflect and iterate
- Strengthen your institutional commitment

Reflect and iterate

Looking through the charts and tables of your audience data is just the first step of analysis. We encourage you to think of this data as a tool or aid—towards **deeper conversation** at your institution. Make time to reflect with your colleagues about why you're collecting data and to examine the data together to interpret the patterns you're seeing.

Questions to ask about your findings:

- Is your audience composed of different kinds of people than you expected?
- Are there any surprising patterns that conflict with your preconceptions about your audience or how they participate?
- How similar is your audience composition to the most recent census data for your area? (in the US, https://censusreporter.org is a good resource to see regional data at a glance)
- Are there kinds of people who you expected to see more of in your audience, but don't?
- What would be your ideal audience composition?
- What could you do to better serve the people who are already in your audience?
- What could you do to welcome people who are not yet engaging?

Share your findings

This toolkit focuses on the “how,” “why,” and “where” of data collection. But there is an important step beyond that: using the data to make positive change in your organization.

The high-quality data you’ve collected is powerful. You can use it to make a formal case for including new audiences, elevating promising programs, or sunsetting ineffective ones. You can use it to inform your colleagues and to help them confront their own preconceptions and biases when making decisions. You can use it to track your progress, celebrate your successes, and understand your struggles along the way.

Ways to increase visibility of your audience data

- Share the survey tool with others at your organization so they know what you’re up to.
- Invite people from across the organization to help field the survey.
- Share out results of the survey with the whole organization, focusing on bright spots, surprises, and concerns.
- Hold an “act on the data” meeting to discuss specific opportunities for change or growth based on what you learned.
- Ask colleagues what they most want to learn and discuss how it might influence their work.
- Focus on opportunities where data could spark action and change. Invite your colleagues to make commitments to new ways of working based on what they’ve learned from the data.

Design Your Survey

Asking about demographics is both valuable AND sensitive. How can you gather demographic data through a survey in a way that respects participants' privacy and comfort? This appendix will provide practical guidance to help you design a welcoming, inclusive, and accurate survey.

The appendix will cover the following topics:

- Survey design goals
- Introductory statements
- Experiential questions
- Transition statements
- Race, ethnicity, and origin
- Age
- Income
- Location
- Gender, gender identity, and gender expression
- Sexual orientation
- Disability
- Additional reading

Survey Design Goals

Ideally, your demographic survey should have, in this order:

An introductory statement

Experiential questions (1-2 ideally, 3 max)

Transition statement

Demographic questions (around 5-8)

Open-ended question (1 max)

As you design your survey:

- Start with a quick introduction followed by 1-2 easy, program-specific questions about a person's experience, and end with demographics.
    - We recommend including demographic questions to better understand who is coming to your programs and events. Note, if your audiences are outside of the United States questions will need to be rephrased for your location, as appropriate.
    - Keep demographic questions at the end and be sure to let your respondents know when you transition to asking sensitive questions (which signals to audiences that you understand the sensitivity of this type of information).
- The final survey should take your respondent no longer than 3-5 minutes to complete. Keep it as short as possible using the minimum number of questions needed to accomplish your goals. Too many questions can result in survey fatigue, which can negatively affect the quality of data or even lead to people opting out partway through.
    - If data isn't essential for your organization, consider omitting the question or make sure it's clearly marked as optional.
- Ask the same questions of every respondent.
- Ensure there are no default values, or answers selected by default, in your survey choices (defaults can lead to survey bias).

Introductory Statements

Always include a short introductory statement explaining why you're gathering data—especially on demographics. The statement should address privacy concerns by explaining that data is gathered anonymously.

Example A

> Thank you for sharing your feedback with us! Your answers will help us improve our work, and they'll help us understand how our work impacts the community. All responses are anonymous.

Example B

> Our goal is to welcome all audiences to our organization. Your responses are anonymous, and data is used in aggregate. The answers help us understand if we are meeting our objectives.

Example C

> We'd like to ask a few questions about yourself and your household. Demographic information is optional, and we respect your decision as to whether or not you answer these questions. Your answers will remain anonymous.

Experiential Questions

People will have a better experience with your survey if you aren't only asking about demographics. While you want to keep the survey short, it is a good idea to include one or two questions about the participant's experience**.** But be selective and only ask questions that will reveal information you can use.

- In your survey, position the experiential questions after your introductory statement but before the demographic questions.
- The only exception is an open-ended question, which would typically come at the end.

Questions about Participant Motivations

If your goal is to understand more about why people are participating, you may want to ask about why they came, who they came with, and/or some of the barriers they may have encountered along the way.

Example A

What are the main reasons you decided to [attend today's event/visit ________]? Please select up to [#].

Example B

Who are you [attending/visiting] with today? Please select all that apply.

Example C

Did you encounter any of the following challenges as part of today's [event/visit]? Please select all that apply.

Questions about Participant Experiences

If your goal is to understand more about what people got out of experiencing your institution, you may ask questions about what they did, what they liked, and what didn't work for them.

Example A

During [the event/your visit] today, which have you done or do you plan to do? Please select all that apply.

Example B

Overall, how satisfied are you with your experience here so far?

Example C

Which of the following have you enjoyed the most during [the event/your visit] today? Please select up to [#].

Example D

Which of the following have you enjoyed the least during [the event/your visit] today? Please select up to [#].

Transition Statements

When you transition from asking questions about a person's experience to demographics, include a short transition statement to address why this data is important to your organization.

Example A

> We just have a few important demographic questions for you, which will be kept completely anonymous. Your responses to these questions are crucial to our understanding of the kinds of communities we're currently serving—and those we could be serving better.

Example B

> We just have a few important demographic questions for you, which will be kept completely anonymous. Your responses to these questions are crucial for helping us understand how our work impacts the community.

Race, ethnicity, and origin

The way the United States Census deals with race and ethnicity can be confusing to many people. We recommend adopting a single question approach and avoiding the term “race” or “ethnicity” in the question itself.

Which describes you?
Check all that apply.

- ❏ Native American, American Indian, or Alaska Native
- ❏ Asian or Asian American
- ❏ Black or African American
- ❏ Hispanic, or Latina, Latino, Latinx, or Spanish Origin
- ❏ Native Hawaiian or Other Pacific Islander
- ❏ Middle Eastern
- ❏ White
- ❏ If you don’t see yourself in the list provided, please self-describe: ______________________
- ❏ Prefer not to say

Notes

- Use checkboxes so respondents can select more than one description.
- Include a fill-in option so respondents can self-describe.
- If you don’t care about all groups, or all groups are not relevant to your area, you can shorten the number of boxes but be sure to include a self-describe option.
- If you know that your audience identifies in a more specific way, you can replace one or more of these categories with sub-categories (e.g., Instead of “Asian or Asian American”, you could include “Chinese,” “Filipino,” “Japanese,” “Korean,” “Guamanian/Chamorro,” “Samoan,” “other Pacific Islander,” etc. Consider your community in making this decision.

Additional context

This approach deviates from the US census approach, but there is good reason for it. The United States Census asks respondents about race and ethnicity separately. However, research by demographers at the Pew Research Center, the Census Bureau, and USC has demonstrated that this can be confusing for many people, especially people who identify as multi-racial, Hispanic, or Latinx.

To address these challenges, demographers have tested a combined question about race or origin. The combined question resulted in more accurate data and a higher response rate. While the US Census has not yet adopted the combined question, we recommend it based on this research.

- In addition to the Census choices of “Hispanic, Latino, and Spanish Origin,” we recommend including “Latinx,” a gender-neutral alternative to Latino/Latina, in answer choices, as this term is inclusive of transgender audiences or those who don’t identify with the gender binary. Because the term is still new and can be confusing to some, we don’t recommend using it at the exclusion of Latino/Latina.

- We recommend aligning with the Census in the use of “white” instead of “Caucasian” in answer choices. The term "Caucasian" has become synonymous with "European" or "white," but in its original meaning the term "Caucasian" refers to people from a specific area, the Caucasus region (which contains Armenia, Azerbaijan Georgia, and part of the Russian Federation).

- We do not recommend asking a question about legal status as a citizen, immigrant, permanent resident, etc. These questions can be extremely sensitive and can lead to lower response rates, especially among people of color.

- We do not recommend using questions about zip/postal codes, income, or educational attainment as a proxy for race/ethnicity questions.

Age

When defining age ranges, consider lining up your age ranges to those defined by the census. That way, your data will match up with their reporting, helping make comparison easier.

Example A

What is your age?

- Under 18
- 18-24 years
- 25-44 years
- 45-64 years
- 65 years and over
- Prefer not to say

Example B

What is your age?

- Under 18
- 18-64 years
- 65 years and over
- Prefer not to say

Example C

Are you over the age of X?

- Yes
- No
- Prefer not to say

Notes

- Use radio buttons for this question, so respondents can only select one answer.
- Make sure there is no overlapping data in the ranges that you use.
- Some people are more sensitive about age than others. Consider your community and how you will use the data when you decide what level of granularity to use.

Income

Always specify whether you're asking about household income or an individual's income. We recommend household income. Using larger ranges provides a shorter list of options, which helps reduce survey fatigue. Or, you can just ask about whether someone is over/under the median income or poverty income in your region. You can find those figures on the census.

Example A

What is your annual household income?

- Less than $20,000
- $20,000 to $34,999
- $35,000 to $49,999
- $50,000 to $74,999
- $75,000 to $99,999
- Over $100,000

Example B

In [state/city/location], the average household income is [median income] per year. Is your household over/under the average?

- Over
- Under
- Prefer not to say

Notes

- Use radio buttons, so respondents can only select one answer.
- Make sure there is no overlapping data in the ranges that you use.

- Consider adjusting the standard ranges if you have deeper understanding of your local populations. For example, if you are working with student populations or organizations in less affluent areas, you may need more defined ranges in the lower tier, while organizations in more affluent areas may need more definition in higher ranges.

- You can also use the census to identify the median income and the poverty income for your area and group your questions based on those thresholds.

Location

When asking about where people live, consider whether you want to understand their exact home location or their proximity to your site.

Example A

What is your home zip/postal code?

____

Example B

Do you live within X miles of here?

- Yes
- No
- Not sure

Notes

- If you use the construction in Example B, pick a distance range that is useful to your understanding of your audience. Your number may vary depending on your location and visitation patterns. Whatever you choose, don't change the number on different surveys (which makes your data hard to compare), and don't offer multiple ranges (which makes it harder for participants to answer accurately).

- We do not recommend using language about residing in a particular neighborhood, city, or region as people have very different interpretations of those borders.

- While there may be some correlations, we do not recommend using location as a proxy for race/ethnicity or income level.

Gender and gender expression

If your organization decides to ask about gender, follow the Human Rights Campaign's recommendation by designing a survey that asks about gender first, followed by a separate question about transgender status.

The two questions should sit together on the same page of your survey.

What is your gender? [checkboxes]

- ❑ Female
- ❑ Male
- ❑ Non-binary / genderqueer / third gender
- ❑ Prefer to self-describe _________
- ❑ Prefer not to say

Would you describe yourself as transgender? [radio buttons]

- Yes
- No
- Prefer not to say

Notes

- When asking about gender, use checkboxes to allow for a range of self-expression.
- These questions can be particularly sensitive. We recommend using a tool that allows you to explain why you're asking for this data that can be seen alongside the question (for example, tools like SurveyMonkey or Typeform allow you to write a descriptive sentence to add context to the question).

Sexual Orientation

If your organization decides to ask about sexual orientation, follow the Human Rights Campaign's recommendation which includes an option to prefer not to say and includes allies as part of the answer choices.

Do you consider yourself a member of the lesbian, gay, bisexual, transgender, questioning, queer (LGBTQQ) community?

- Yes
- No
- No, but I identify as an Ally
- Prefer not to say

Note

- In the example above, use radio buttons, so respondents can only select one answer.
- It's important to recognize that the experiences of people within this community vary widely and you may find it more inclusive to give your audience a chance to self-describe within the larger LGBTQQ context. If so, this question can be adjusted to include specific community definitions. If you adjust the question format accordingly, be sure to switch to checkboxes so respondents can select more than one description. Also, include a fill-in option so respondents can self-describe.
- These questions can be particularly sensitive. We recommend using a tool that allows you to explain why you're asking for this data that can be seen alongside the question (for example, tools like SurveyMonkey or Typeform allow you to write a descriptive sentence to add context to the question).

Disability

There are several ways to ask about disability in the context of a survey. Each takes a different approach to the concept of disability and will help the organization learn about different aspects about their audiences.

Example A

This first example uses an approach that is aligned with the social model of disability. The social model is defined by the barriers present in society, rather than the medical model, which is a diagnosed physical/medial impairment. Respondents self-identify based on their personal experience of disability.

> Do you or does someone in your visiting party identify as a D/deaf or disabled person, or have a long-term health condition? [radio buttons]
>
> - Yes
> - No
> - Prefer not to say

Example B

If your organization needs more granularity, consider combining the social model of disability in Example A with a second questions with a categorical breakdown of recognized disability types. Please refer to your country's census or large-scale surveys for the most appropriate terminology.

> Do you or does someone in your visiting party identify as a person with a disability in any of the following areas? [check boxes]
>
> - Hearing
> - Vision
> - Cognitive
> - Ambulatory/mobility
> - Other __________________
> - Prefer not to say

Example C

Another approach may ask about a person's needs relative to their abilities. Using a question like this could tell your organization more about needed services regardless of a person self-identifying as disabled.

When you come to [venue/organization/performance], are there accommodations we could provide that would make our experience more accessible to you or someone in your visiting party? [check boxes]

- Accessible seating/places to rest
- Assistance opening doors
- Free loans of mobility aids (e.g., wheelchairs, etc.)
- Large print text
- Verbal/visual descriptions
- Information available in braille
- American Sign Language (ASL) interpretation
- Assistive listening devices
- Open captioning
- Sensory friendly programming
- Tell us about other needs ________

Additional Reading about Demographics

- A special thank you to Sarai Rosenberg for the Medium story, “Respectful Collection of Demographic Data” (https://medium.com/@anna.sarai.rosenberg/respectful-collection-of-demographic-data-56de9fcb80e2)

- A special thank you to Andrea Fryrear for the blog post, “How to Write Better Survey Questions” (https://www.surveygizmo.com/resources/blog/how-to-write-better-demographic-questions/)

- Pew Research Center, “U.S. Census looking at big changes in how it asks about race and ethnicity” (http://www.pewresearch.org/fact-tank/2014/03/14/u-s-census-looking-at-big-changes-in-how-it-asks-about-race-and-ethnicity/)

- Pew Research Center, “Is being Hispanic a matter of race, ethnicity or both?” (http://www.pewresearch.org/fact-tank/2015/06/15/is-being-hispanic-a-matter-of-race-ethnicity-or-both/)

- US Census Bureau, “National Content Test Race and Ethnicity Analysis Report”) https://apps.npr.org/documents/document.html?id=4316468-2015nct-Race-Ethnicity-Analysis)

- Concepción de León, The New York Times, “Another Hot Take on the Term ‘Latinx’” (https://www.nytimes.com/2018/11/21/style/latinx-queer-gender-nonconforming.html)

- Human Rights Campaign, “Collecting Transgender-Inclusive Gender Data in Workplace and Other Surveys” (https://www.hrc.org/resources/collecting-transgender-inclusive-gender-data-in-workplace-and-other-surveys)

- Audience Finder recommendations on disability for Arts Council England (ACE) (https://www.theaudienceagency.org/news/new-question-on-disability-to-audience-finder)