

southwest  
|arts marketing  
strategic services and support

## **Monitoring & Evaluation Handout**

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## Why Do It?

The marketing concept is based on the belief that, to be successful, an organisation must constantly try to match its own capabilities to the needs of the customers.

Market research is the collection and analysis of data from a sample of individuals or organisations related to their characteristics, behaviour, attitudes, opinions or possessions. Research therefore provides the information to be used in making marketing decisions and should help reduce the risk in decision making.

But the first step in providing good marketing data is balancing the information you would really like against what you need/can practically use and what is feasible. Information has a cost and, generally, the more accurate the information the higher the cost. Most marketing research involves some trade-off between accuracy and cost.

So, in a climate where resources are always at a premium and the needs of the artistic programme are so immediate, why should arts organisations bother with investment in research and evaluation?

The most immediate reason is that it is only through evaluation that it is possible to measure success. It is vital to set realistic objectives then work on a strategy to achieve those objectives, remembering that in all pilot initiatives, finding out what does NOT work is as important as finding out what does.

Evaluation also gives the market intelligence necessary to inform future decision-making in order to make the most effective use of resources and allow for realistic financial targeting. It is also important to inform future programming so that the product is relevant to the target market. Obviously in the subsidised arts sector the product is the most important consideration and customers certainly shouldn't dictate what work you produce and how you produce it. But to ignore the customer completely will mean that your work is not seen by the very people you were producing it for. Without an audience a public performance is just a contradiction in terms. This does not mean that a market segment should not be 'invited' to attend events that are not specifically 'aimed' or targeted at that (e.g. rap gigs and older audiences/opera and youth audiences) but that targets for attenders in that segment are realistic and that a mixed programme includes product that is relevant to every sector of the community or a mission statement (in agreement with funding bodies) that accepts the product has a specific and limited target market. The essential message is to avoid misrepresenting product in order to attract a target audience as they will be disappointed and lose trust in future communications.

Evaluation also allows you to use the results in advocacy campaigns. Stakeholders such as funding bodies, media and opinion formers in the local community are essential target markets with whom it is vital to communicate effectively and results of logistically sound research and monitoring offer impressive evidence of success in key areas including social inclusion and reach.

Finally, never forget that evaluation is increasingly a funding requirement!

## Terminology & Methodologies

**Market research falls into two main categories – continuous and ad hoc:**

- Ad hoc research is undertaken when a specific problem has led to the need to acquire specific data
- Continuous research is the ongoing monitoring and basic data about the marketplace, the performance of the organisation or products/services within it

**Data can be gathered in two ways – primary and secondary:**

- Primary data is information collected directly by an organisation for a specific purpose
- Secondary data is any data originally collated for a purpose other than current research objectives, also called desk research

**Data comes in two categories – qualitative and quantitative:**

- Qualitative data is information that gives insight to and understanding of the consumer, not usually statistically valid
- Quantitative data is statistics, the measurements of actuals

The most important part of research is deciding the appropriate methodology for the data you require – different methodologies produce different types of data. You must define the problem, ask the right questions and choose the correct method to get a useful answer. It is imperative to know **WHY** you want the information and **WHAT** you're going to do with it before deciding **HOW** to get it.

**Secondary research** should always be the first stage of data gathering as it saves time and money if the information you require already exists, as well as setting the context for your own research. **Sources** include:

- Government statistics
- Popular media
- Technical or specialist publications
- On-line and electronic databases
- Data services (consumer information houses)

The Office for National Statistics (ONS) publishes A Brief Guide to Sources, listing all government sources of statistics and Key Data, containing summary statistics covering everything from economic and financial trends to education results. Altogether the Government regularly publishes over 300 statistical sources and all are available from either The Stationery Office or direct from the ONS. Government statistics are great because they cover the whole UK and can be used for purposes of comparison but they may not be tailor-made for the purposes of your research.

**Primary research is time-consuming and costly. You shouldn't do it unless:**

- You have a clear idea of what issues or questions you are addressing
- You are confident that the method you are using is unbiased and experimentally sound
- The data gathering tools you are using are both reliable and valid
- The data you collect will be sufficient to draw conclusions and make recommendations

**There are three basic ways of collecting primary data in qualitative research:**

- Depth interviews
- Focus/discussion groups
- Projective techniques

**There are three basic ways of collecting primary data in quantitative research:**

- Experimentation – testing one against another (e.g. designs of flyers) based on results
- Observation – behaviour not attitude (e.g. order visit exhibits, time spent)
- Surveys – includes interviews, telephone, postal

Basically they all MEASURE.

**Surveys** are often the most cost-effective form of monitoring available to arts organisations but it is imperative to decide **WHAT** you want to know in order to determine **WHO** to survey and **WHAT** to ask. It is possible include attitudinal questions expressed as a quantity (e.g. satisfaction levels) but it is vital to check and re-check questions so that respondents and surveyors understand them to mean the same thing.

**There are key rules when designing a questionnaire:**

1. Keep it short  
If your survey is long you have poorly defined survey goals. If you don't know or care what you will do with the result of a question – remove it!
2. Design your questionnaire to match your survey method  
You can easily include branching and linked questions with CAI/CATI surveys
3. Keep it simple  
Don't mix topics, respondents lose interest or are confused.
4. Don't combine questions  
Never ask what respondents think of a + b at the same time as the response will be confused
5. Avoid jargon, technical details and abbreviations  
Why should respondents know what they mean?
6. Don't present biased questions

How happy are you with this fantastic, top of the range kettle? Do you always feel safe walking down your dark street at night? Do you think the council is doing everything possible for the education system in your town?

7. Check grammar, spelling and design  
You will look unprofessional, uncaring and untrustworthy if your copy is littered with errors
8. Always have a middle response option  
Don't Know or Not Applicable gives respondents real control
9. Provide sample questions with completed details  
You might think it's obvious but many people are easily confused by any type of form
10. Be specific  
Woolly questions get woolly answers
11. Always leave space for comments  
You have invited people's opinions and must give them the opportunity to give them
12. Be neat, tidy and well-spaced  
The design should make it easy for respondents to give their opinions
13. Check the order of questions is logical  
Frustration and confusion result from non-sequential questions
14. Always start with an explanation of who you are, why you are asking and what you will do with the data. Remove suspicions and barriers
15. Ask if respondents would be willing to take part in follow-up research

**Questions can be of three types:**

- Multiple choice (i.e. closed)
- Open-ended
- Hybrid (multiple choice with option to put own answer)

**Attitude choices are usually of three types:**

- Likert scale – strongly agree/agree/neither agree nor disagree/disagree/strongly disagree
- Semantic differential – Good 1 2 3 4 5 6 7 Bad
- Rank – place list in order of preference/priority

Deciding on the **target population** is critical. Samples can be 'random' but this can be:

- Simple random sampling
- Systematic random sampling (every 10<sup>th</sup> person)
- Stratified (population divided into groups based on one or more criteria then randomly selected within one group)
- Multi-stage sampling (large groups subdivided then randomly selected then subdivided then...)

Other than random, sampling is called non-probability sampling and can be done by:

- Judgement – choosing those considered representative
- Convenience – most convenient population such as friends or nearest local outlet
- Cluster – all from a subdivided group
- Quota – a pre-determined number from different groups such as microcosm of total population

NB: Computer assisted interviews generate a high response (novelty?)  
Postal surveys generate a low response (less than 10%)  
Self-completion surveys generate bias as the population is self-selecting  
Prompt cards reduce bias in face-to-face surveys

**Presentation of data** is critical and represents the core marketing function – communication. Accuracy and interest are the key to good data presentation, turning raw data into useful analysis whilst avoiding bias in presentation/interpretation.

- Never omit data (e.g. number of respondents, size of sample, how constructed)
- Never manipulate graph axes (e.g. choose inappropriate numbers to exaggerate a trend)
- Always provide comparative data (e.g. how this compares to the market as a whole)
- Always use an appropriate presentation method (e.g. pie charts can conceal trends shown in graphs)

### **To recap – ways of getting information include:**

- Counting - head counts, ticket receipts, box office reports, hits and triggers
- Questioning -on street, self-completion, telephone, filter, census, focus group
- Observing - reaction, behavioural changes
- Researching - existing data
- Experimenting - trying two different approaches & measuring result

### **Samples can be:**

- Total – all available
- Random – no criteria in selection
- Stratified/Cluster – selection criteria of 'like'
- Microcosm – selection criteria of 'recreate make-up of total

### **What you are measuring includes:**

- Reach – usage/awareness
- Reaction – interest/attitude/future actions
- Result – expectation vs. outcome/against objectives/impact

### **Examples of methodologies include:**

1. Questionnaires
  - a) face-to-face
  - b) postal
  - c) computer
  - d) telephone
  - e) recording (video box, radio reactions, etc)
2. Focus Groups
3. Observation
4. Visit records
  - a) Box office records
  - b) Website hits and triggers
  - c) Head counts