Guess Who's Going to the Gallery?

A Strategic Audience Evaluation and Development Study by Museums & Galleries NSW

NSW State Report

M&G NSW

Australian Government | Australia Council for the Arts

This project has been assisted by the Australian Government through the Australia Council, its arts funding and advisory body

by Matthew Mackenzie Steele and Michael Huxley
January 2010

NSW | Communities arts nsw

Museums & Galleries NSW are supported by the NSW Government through Communities NSW – Arts NSW.

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Partners

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Research Partners

Jones Donald Strategy Partners

University of Wollongong

Project Team

Project Team - M&G NSW

- Michael Huxley, General Manager, Business & Administration
- Matthew Mackenzie Steele, Senior Researcher, Research & Audience Development
- Ella Johnstone, Research Assistant , Audience Development
- Annalice Creighton, Research Assistant
- Andrew Brettell, Coordinator Communications and Marketing

External Project Team

- Karen Cooke - Data entry management, Ekas Market Research Services
- Tony Jones, Managing Partner, Jones Donald Strategy Partners

Museums & Galleries NSW are supported by the NSW Government through Communities NSW – Arts NSW

Participating Galleries

2007- 2008

- Campbelltown Arts Centre
- Blacktown Arts Centre
- Liverpool Regional Museum
- Hawkesbury Regional Gallery
- Penrith Regional Gallery
- Fairfield City Museum & Gallery
- Parramatta Heritage Centre
- Lake Macquarie City Art Gallery
- Maitland Regional Art Gallery
- Newcastle Region Art Gallery
- Gosford Regional Gallery
- Muswellbrook Arts Centre

2008- 2009

- Art Gallery of NSW
- Artspace
- Australian Centre for Photography (ACP)
- Hazelhurst Regional Gallery
- Hurstville City Museum & Gallery
- Manly Art Gallery & Museum
- Mosman Art Gallery
- Museum of Contemporary Art (MCA)
- Object: Australian Centre for Craft and Design (Object)
- National Trust S.H. Ervin Gallery

2010

- Albury Art Gallery
- Bathurst Regional Art Gallery
- Bega Valley Regional Gallery
- Coffs Harbour Regional Gallery
- Cowra Regional Art Gallery
- Goulburn Regional Art Gallery
- Grafton Regional Gallery
- Griffith Regional Art Gallery
- Lismore Regional Gallery
- Manning Regional Art Gallery
- New England Regional Art Museum
- Orange Regional Gallery
- Shoalhaven City Arts Centre
- Tamworth Regional Gallery
- The Glasshouse Regional Gallery
- Tweed River Regional Art Gallery
- Wagga Wagga Gallery
- Western Plains Cultural Centre
- Wollongong City Gallery

Project Steering Committee

The Steering committee was shaped by the varying needs of the study and consequently members of the committee changed across the life of the project. M&G NSW would like to thank every member of the committee for their expertise and commitment to this project.

- Chair – Michael Huxley: General Manager, Finance and Administration, M&G NSW ^
- Debbie Abraham: Director Lake Macquarie City Art Gallery *
- Katy Alexander, Research and Audience Development Manager, M&G NSW (2007-2008) ^^
- Lisa Andersen: Senior Researcher, CAMRA Cultural Mapping Project, University of Technology Sydney
- Sue Boaden: Director, Australia Street Company
- Bow Campbell: Program Officer, National Audience Development, Australia Council for the Arts #
- John Cheeseman: Past Director Blacktown Arts Centre *
- Kim Hanna: Manager, National Audience Development, Australia Council for the Arts#
- Tony Jones: Managing Partner, Jones Donald Strategy Partners
- Dr Lynda Kelly: Head of Audience Research, Australian Museum
- Dr Elaine Lally: past Senior Fellow And Assistant Director - Centre for Cultural Research , UWS *
- Professor Amanda Lawson: Dean, Faculty of Creative Arts, University of Wollongong
- Keith McGowan, Associate Donald Jones and Associates #
- Maisy Stapleton, past M&G NSW CEO #

*Year 1 2007-2008 only

Year 1 & 2 2007-2009 only

^ Oct 2008 – Jan 2011

^^ 2007 – Oct 2008

Introduction

Image courtesy of Australian Centre for Photography

Background

- In 2005 Museums & Galleries NSW (M&G NSW) commissioned a scoping study of 32 regional public galleries in NSW. This research revealed that there was very little to no audience research undertaken by regional galleries across the state. Furthermore, the audience research undertaken, had little to no consist methodology.

- Following the outcomes from the scoping study, in May 2007, M&G NSW commenced the *Strategic Audience Evaluation and Development Study for Galleries in NSW* with core project funding from the Australia Council for the Arts.

- The study set out to provide benchmark information on gallery audiences, their demographics, actions, attitudes, limitations and needs, with a consistent methodology.

- In the first year of research, M&G NSW trained staff and volunteers at 12 museums and galleries across two regions of NSW - Western Sydney and the Hunter/Central Coast - to distribute standardised paper self-complete questionnaires to their audiences.

- In 2009 M&G NSW commenced the second year of the *Strategic Audience Evaluation and Development Study* with the audiences of the public galleries located in the Sydney Metropolitan region of NSW.

- In 2010 M&G NSW surveyed gallery audiences across a further 19 public galleries located in regional NSW, with continued key funding from the Australia Council for the Arts.

The purpose of the State report is to gain a state perspective on the data obtained across the three years of the study from 2008 – 2010.

Study Aims

The overall objective of the Study is to provide factual and reliable data for the sector.

The data presented is intended to act as a benchmark and a guide for future research opportunities. The questionnaire was designed with a "generalist" mindset, so that the same questionnaire could be applied to any public gallery/museum/centre in the study.

This data can be used to support activities the individual galleries undertake to:

- Retain current audiences,
- Identify opportunities to build new audiences,
- Understand the diversity of their audiences,
- Offer the best programming possible,
- Determine the best ways of attracting audiences, marketing and publicising exhibitions and events,
- Plan effectively for the future, and
- Advocate for regional and state-wide programs of audience evaluation and development.

Museums & Galleries NSW

Methodology

The questionnaire:

- A standardised self-complete paper survey was designed for use in all the participating galleries. A copy of this questionnaire can be found in the Appendix.
- Training was provided to staff and volunteers at each participating gallery in sampling and administration of the questionnaire.
- Staff and volunteers distributed the self-complete paper survey to visitors, during the allocated 2 survey periods. Each survey period had a target of 100 surveys and ranged from 2 weeks to 3 months, depending upon rates of visitor attendance and staff resources.

The sample:

- Surveying staff were trained and instructed on how to sample randomly, to ensure the data is as representative as possible. For example, staff were encouraged to sample every 10th visitor passing through the exit.
- Children and school teachers attending in school groups were not surveyed, as the questionnaire was not designed for educational visits. The 15-18 year olds who participated in the survey were visiting alone, or with family, friends or partner.
- Only visitors 15 years or older were invited to complete the study.
- A maximum of 2 people were surveyed from any one tour group.
- The standardised questionnaire was only available in English.
- The restrictions on sampling (age, language, groups) should be kept in mind when interpreting the data.

Approach to Analysis

Egalitarian data weighting:

- In 2009, which focused on galleries in Sydney Metro exclusively, the study created an index called the “Sydney Metro Index”. The Index essentially weighted the data from all galleries so that they contributed an equal share to the overall statistic for that region.
- The alternative would have been to weight the size of annual visitation. However, some galleries in Sydney (notably the Art Gallery of NSW and the Museum of Contemporary Art) have such high levels of visitation, weighting the data to actual visitation rates would have skewed the results substantially (in favour of their visitor base).
- A similar approach has been adopted in 2010 for this state-wide report. All galleries have been weighted to an equal base, so that each gallery is having an equal say in the indices generated by their groupings.

A geographical approach:

- The study is not presented as longitudinal data (2008 vs. 2009 vs. 2010) because the different galleries were surveyed in each of the years. A longitudinal study would only be appropriate if the same galleries were surveyed year on year.
- Rather, the study is structured around differences between gallery regions and combines data from the three years.

Breakdowns by key demographics and visitor types:

- This report also looks at differences between key demographics (notably Age x Gender) and between different visitor “types” (such as tourists, international tourists, interstate tourists, first-time visitors, and so forth).
- Combining the sample from the three years, allows for detailed breakdowns of the sample in the above groups with sufficient statistical power.

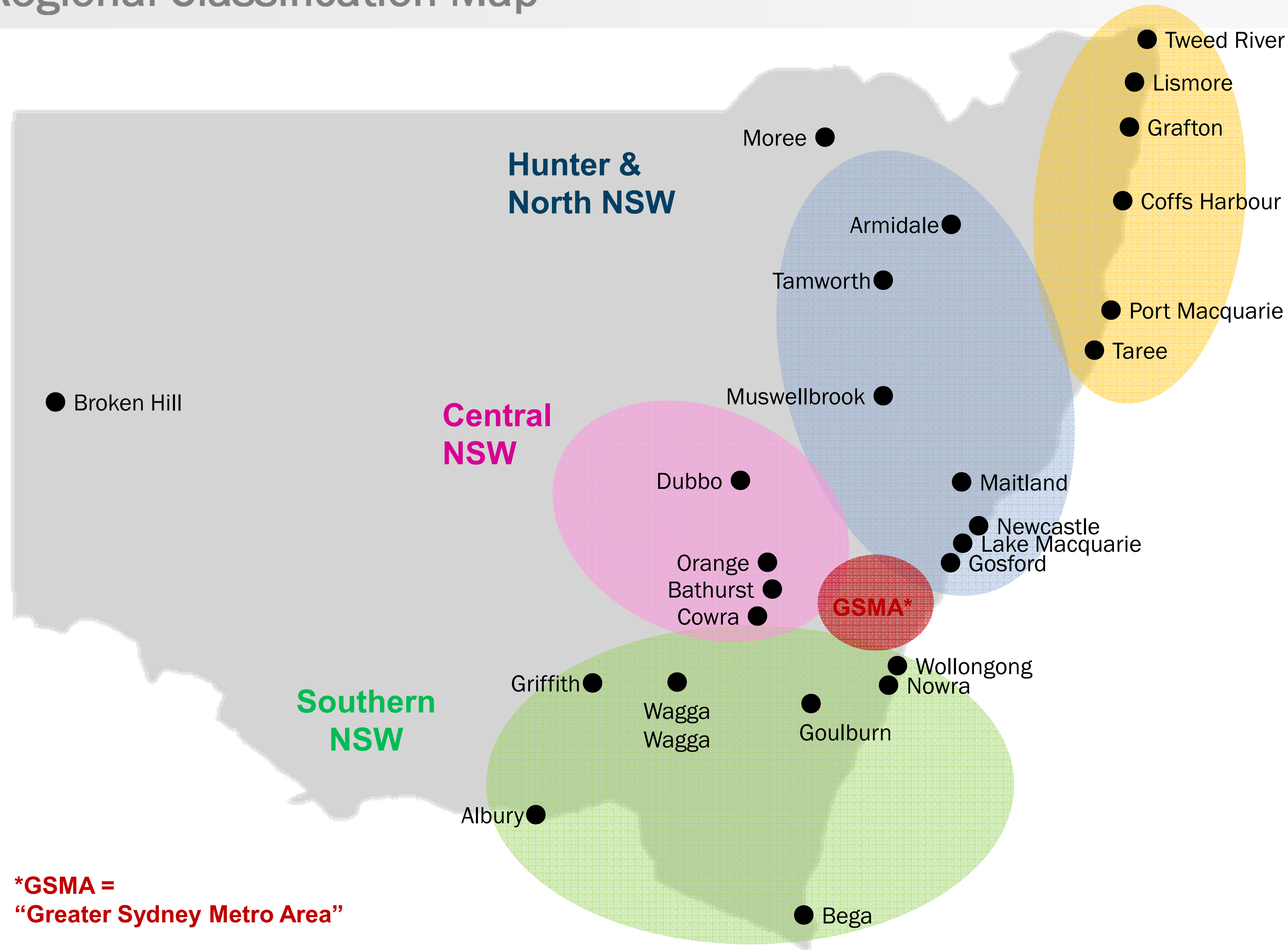
Geographical classifications of galleries

"Greater Sydney Metro"*	"North Coast"	"Hunter & Northern NSW"	"Central NSW"	"Southern NSW"
Campbelltown	Coffs Harbour	Lake Macquarie	Western Plains Cultural Centre	Wollongong
Blacktown	Grafton	Maitland	Bathurst	Wagga Wagga
Liverpool	Tweed River	Newcastle	Orange	Albury
Hawkesbury	Lismore	Gosford	Cowra	Bega
Penrith	Manning (Taree)	Muswellbrook		Goulburn
Fairfield	The Glasshouse (Port Macquarie)	Tamworth		Griffith
Parramatta		NERAM (Armidale)		Shoalhaven (Nowra)
Object				
ACP				
Artspace				
St George				
SH Ervin				
Manly				
Hazelhurst				
MCA				
AGNSW				
Mosman				

Notes:

- Note: the "Greater Sydney Metro" grouping above is <u>not</u> the same as the "Sydney Metro Index" in 2009, as discussed overleaf.
- Certain galleries in NSW are not represented in the data for a variety of reasons including renovations at the time of the survey and being unable to participate due to resourcing or staffing issues. These include: Broken Hill Regional Art Gallery, Casula Powerhouse Arts Centre, Cessnock Regional Art Gallery, and Moree Plains Gallery.
- Heidi Museum of Modern Art (Victoria) also participated in Year 2 (2009) of the Study, as a pilot for the Study outside of NSW. The results from Heidi are not included in this report or in the 2009 Metro Sydney report.

Regional Classification Map



*GSMA = "Greater Sydney Metro Area"

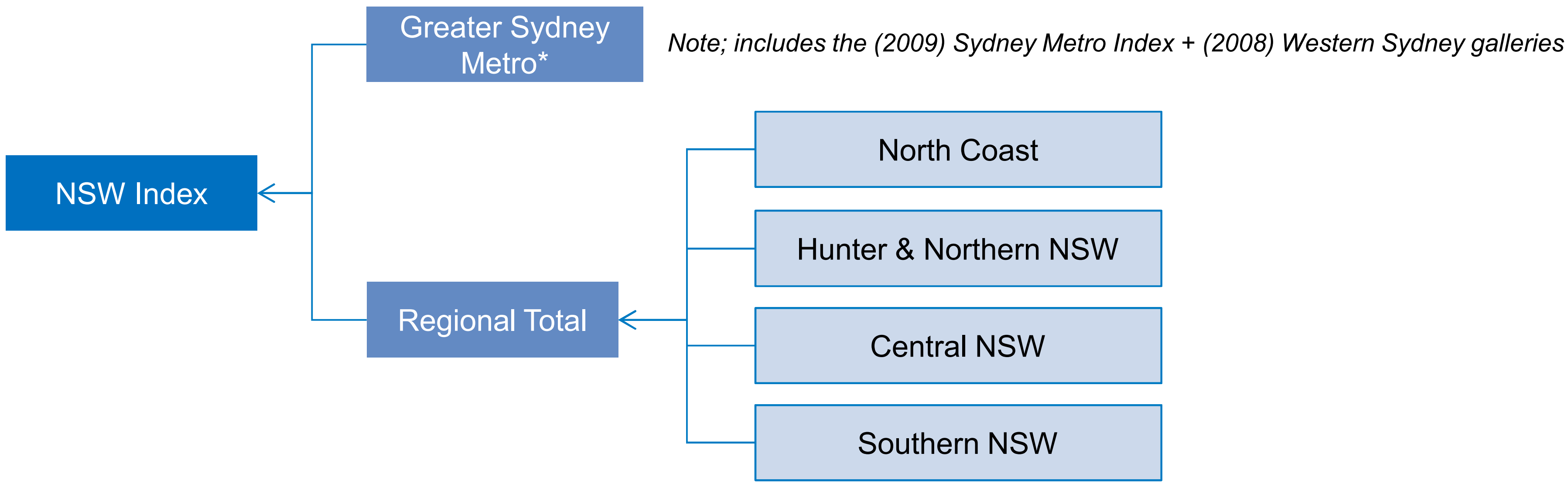
Important notes on the Indices

Greater Sydney Metro combines 2008 & 2009 data, thereby including audiences from the galleries located in Western Sydney:

- The “Greater Sydney Metro” Index is NOT the same as the “Sydney Metro Index” in 2009.
- In the State report, “Greater Sydney Metro” includes data from both Western Sydney galleries (from 2008) and data from the Sydney Metro galleries surveyed in 2009.
- The Sydney Metro Index in 2009 excluded the Western Sydney data from 2008. In other words, the “Greater Sydney Metro” Index is a more encompassing index, incorporating more galleries from across the Metro Sydney region.

The regional groupings are indices unto themselves, but also aggregate to create a “Regional Total” and “NSW Index”.

- All the boxes below represent “indices” that are examined in this report to compare regional data.
- The indices can combine to create high-order indices, such as the “Regional Total” and “NSW Index”



Key definitions

- **The "NSW Index"**
  - The standardised average score for all the participating galleries across NSW
  - Can be referred to simply as "the NSW average" or the "state average"

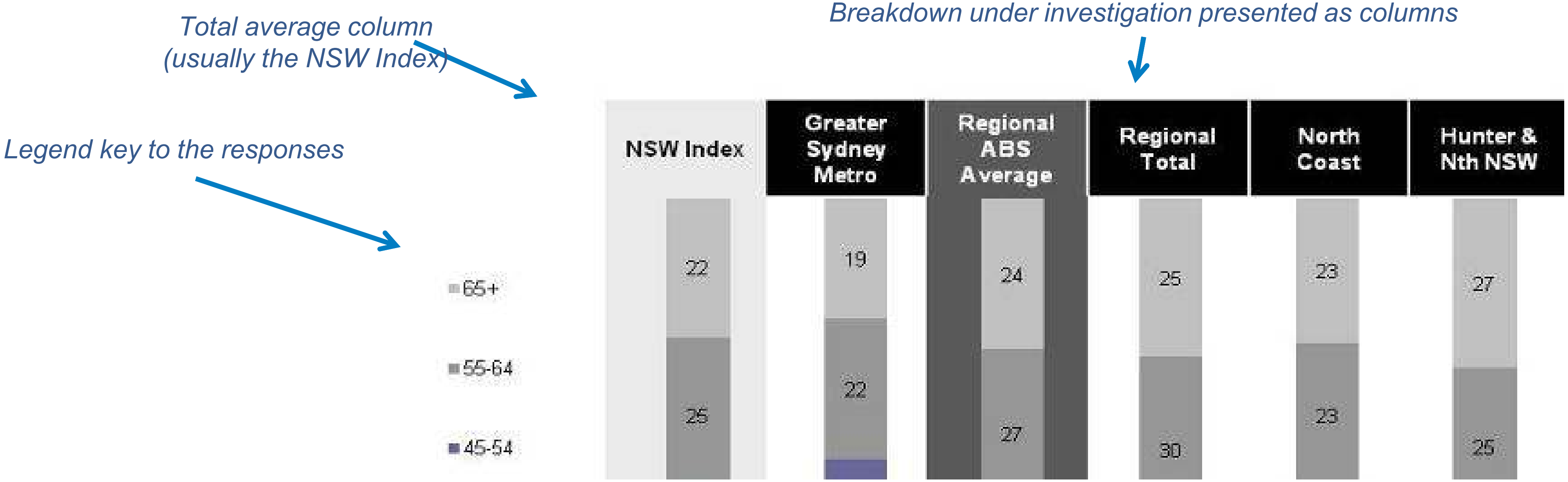
- **"Tourists"**
  - Audience members who nominate they live interstate or internationally, OR those who live within NSW but who also nominate that they are "visiting town" by virtue of ticking the appropriate box

- **"Audience"**
  - In this context is synonymous with gallery "visitors"

- **"Base"**
  - The number of respondents on whom the percentage figure or statistic is calculated.
  - Bases vary as data is filtered so as to analyse specific sub-groups, or if certain respondents do not provide a valid answer to a question. Unweighted valid base sizes are shown on all graphs where appropriate.

Note on reading charts

- ***All figures*** shown are ***percentages*** unless otherwise specified
- Some data (where appropriate) is compared to Australian Bureau of Statistics (ABS) data including related 2006 census data
- Individual bases for the data are show with a description of any applied data filters
- For each question, standard breakdowns are shown for:
  - **Regions** (including a "Regional Total" which is the addition of the 4 non-Metro regions in NSW.
  - **Key demographic segments** (namely, GENDER x AGE brackets)
  - **Tourist type** (comparing International, Interstate, Intrastate, and "Local" Visitors).
- The standard presentation of a single-response question is explained below.
- Note: charts can add to over 100% (eg: 101% or 99%) due to whole number rounding error.



Executive Summary

M&G NSW

Image courtesy of Museum of Contemporary Art

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Summary of Key Findings

Audience profile skews

- The previous regional reports revealed that individual galleries can vary quite markedly in their audience profile. M&G NSW encourages individual galleries to compare their gallery-specific data against the relevant regional benchmarks (averages).
- One persistent finding across galleries and across regions is the skew towards females and towards the over 55's in the audience base.
- Around 2 in 3 visitors are female (rule of thumb) and nearly half (47%) of the audience is over 55's. Both of these are over represented in galley audiences compared to the relevant ABS data.
- Metro Audiences are younger than the region audiences (41% Vs 30% under 44 years old). However the regional population is generally older than metro population (37% Vs 18% over 55 years)
- Also, it is interesting the public gallery audiences skew away from the under 35's whereas the age group in the middle (35-54, ie: "the family age band") are relatively proportionate to ABS data (around a third or 32%). In other words, the increase in over 55's appears to be offset by the dip in under 35's.
- Furthermore, age and gender appear to be independent of each other. That is, men and women in the gallery are equally likely to belong to a particular age category.
- Although all education levels are represented in the different regions, audiences in NSW public galleries are showing a skew towards tertiary degrees, particularly post-graduate qualifications.
  - Recent ABS figures show that 23% of Australians between 15-64 hold a bachelor's degree as a highest level of education, but over half of the public gallery audiences (including over 65's) hold a bachelor's degree (source: ABS 6227.0).

Summary of Key Findings

Metro audiences and regional audiences are similar

- The metro audience profile does show some differences from regional audiences, with:
  - more full-time workers and less likely retirees (33% vs. 26%)
  - a greater proportion of visitors speaking a language other than English at home (23% vs. 9%)
  - more international tourists (12% vs. 3%)
  - a tendency to travel beyond 5km and LGA boundaries (eg: 41% vs. 28% for living more than 5km from gallery, but still "non-tourist")
  - spending longer in the galleries (33% vs. 19% spending more than 1 hour in gallery)
- The four different regional areas (North Coast, Hunter & North NSW, Central NSW and Southern NSW) do not differ markedly from each other with respect to the above characteristics.
- It is likely that metro galleries audiences are more likely to be crossing local government areas due to the smaller size of LGA's in metro areas and the accessibility of galleries in the GSMA compared to regional areas.
- The average shows all regions having a sizeable proportion of visitors who live within 5km of the gallery (43% NSW average), but in reality this can vary substantially (from 10% to 59%) between individual galleries.
- The results show that proximity to the gallery (within 5km) can make a difference to a non-tourist audience's likelihood to:
  - Visit the gallery more times in the past (60% vs. 49% visiting more than 5 times, and conversely, 13% vs. 22% first-time visitors)
  - Visit the gallery more frequently (69% vs. 43% visiting within the last 6 months)
  - Attend a workshop/talk/group activity at the gallery (52% vs. 43%)

Summary of Key Findings

Tourism a fundamental behavioural factor

- An audience tourist-status is a fundamental divide in their attitudinal and behavioural profile. This was shown in the 2009 Sydney Metro Report and holds true at the state-aggregated level. Throughout the report, analysis is sometimes made excluding the tourist base because this group thinks and acts differently from the “non-tourist” audience base.

- All regions across NSW show a proportion of tourists of intrastate, interstate and international origins. The relative proportions of these can vary between galleries, (eg: 0% to 35% international tourists).

- At a broad level, the GSMA galleries show the highest proportion of international tourists (at 12%) and South-East NSW the highest proportion with interstate tourists (at 11%).

- Most of the international tourists recorded were from English-speaking countries, but it should be noted that the questionnaire was only available in English, which may under-represent non-English speaking tourists or tourists with limited English.

- Differences between the three tourist-types (international, interstate and intrastate) are examined in detail in the report, but generally tourists are much more likely than non-tourists to:
  - Be first-time visitors (the major difference)
  - Attend with a spouse/partner
  - Spend longer in the gallery on average
  - Be motivated by the general collection than the special exhibition
  - Uptake tourist fliers and hear about the gallery by simply “passing by”
  - Be (slightly) more gender balanced (61%-65% female vs. 70% for non-tourists)
  - To have not attended a public program at the gallery before
  - To not hear about the gallery through local media (community newspapers, radio, poster, etc.)

Summary of Key Findings

History of visitation

- First-time visitors make up around a third of visitors for the average public gallery in NSW. Many of the first-time visitors are in fact tourists (at 4 in 5 of the international tourists and around 2 in 3 of the domestic tourists).
- Limiting the analysis to the non-tourists (ie: excluding tourists from the sample), the proportion of first-timers drops across regions to between 15-18% (or just over 1 in 8 visitors). Amongst non-tourists GSMA shows a higher proportion of first-timers (around a third).
- Across regions, there is evidence that most visitors have been to the gallery multiple times before. Over half of the visitor base (amongst non-tourists) has been more than 5 times before on average, with the exception of GSMA (at 33%).
- There are no substantial differences with gender, with men and women equally likely to be visiting the gallery the same number of times across age groups. The only exception being the over 65+ females who are more likely than men to have visited the gallery more than 5 times in the past (62% vs. 53% respectively).
- Amongst repeat visitors to the gallery (ie: excluding those who have “never visited before”) the majority (around two-thirds) are returning to the gallery within a six-month period, and this is true of all regions including the GSMA.
- Amongst non-tourists, proximity again plays a role with those living closer to the gallery (within 5km) more likely to visit more than 5 times before in the past and more likely to be returning within a 6 month period.
- A parallel finding from the study is that a high proportion (at least three-quarters rule of thumb) of public gallery visitors have been to other public galleries in the last 12 months, both within the same region and elsewhere. Furthermore the data shows this increases with increased familiarity with a particular gallery (ie: the “gallery enthusiasts”).

Summary of Key Findings

Visitation patterns of behaviour

- At the total average level, the regions do not differ markedly with respect to:
  - The social arrangement of visitors - around 1 in 3 visitors are coming alone and around a quarter with a spouse/partner,
  - The length of visit (typically up to 60 minutes for 70-80% of the visit base), except for GSMA with a slightly longer visitation average, and
  - The likelihood to have attended a public program at the gallery in the past (at around a third of the total visitor base, including tourists).
- Differences in visitation patterns emerge when the data is examined by the key demographics and where the visitors live (particular amongst the tourist groups as discussed).
- For instance, men at each age level are more likely to be coming along with a spouse or partner than women, and this effect is most pronounced in the older age brackets. This suggests that men are more likely to be coming because of a female spouse/partner than the converse.
- Under 45's men are more likely to be coming on their own compared to females of the same age group.
- Males are also likely to spend less time in the gallery than females – regardless of age
- Interestingly, those living closer to the gallery (within 5km or within the LGA) are more likely to have attended a public program at the gallery in the past.

Summary of Key Findings

Communications, Motivations & Public Programs

- Across all visitor types and gallery regions, "word of mouth" is the single most effective means of connecting with a gallery audience. As a rule of thumb, around a third of public gallery visitors heard about the gallery or exhibition by a recommendation from someone else.

- Amongst the non-tourists, the local newspaper and brochures/fliers are common sources of information. Interestingly, non-tourists are also ready up-takers of "tourist information" underscoring the accessibility and universality of such information

- The use of the Internet as a source of information is surprisingly low (around 6%) on average. However, younger audience members are much more likely to use the Internet as a source of information (around 8-9%).
  - With increasing penetration of Internet, a new e-savvy generation coming through and the advent of the National Broadband Network (currently legislated at the time of this report) we can expect the role of the Internet as a communication medium to rise in years to come.
  - Public gallery visitors are mostly online, with at least 85% in most galleries having access to the Internet. Interestingly, around 2 in 3 currently use the Internet to "find out about things to do" and represents key potential for marketing growth.

- Interest in the types of events, public programs and exhibitions at the gallery varies primarily by demographic segment. In general younger audience members (under 35's) show different tastes to older audience members, and in particular younger audiences:
  - Have a greater interest in live performance and music at the gallery (whereas older audiences are more interested in artist talks and workshops)
  - Have a greater interest in contemporary art and emerging art forms such as digital media arts

Museums & Galleries NSW

Summary of Key Findings

Satisfaction

- One of the most pleasing and enduring findings from across all regions and the life of this study is that satisfaction with each of the galleries is generally very high, with most galleries receiving at least 90% "good" or "terrific" ratings, and this is true across regions and visitor types.

- Typically the helpfulness of staff and volunteers are the areas most likely to receive a "terrific" rating from the audience (59%), alongside the exhibitions and the atmosphere of the space/building/environs (53%).

- On the other hand, some specific areas show a small pool of visitors "disappointed" (less than 15% in most aspects). These often tend to be around issues that the individual gallery may have little direct control over such as ease of parking, signage and the café. Interestingly, no clear demographic skews exist that can point to audiences who are more or less likely to be disappointed.

- Individual galleries received verbatim feedback on areas of delight and suggestions for improvement from the respondents in each gallery who offer feedback. Some of the most common types of feedback have included:
  - A call for a café if one is not present, as many visitors like to share their experience with others and enjoy the social aspect of their visit.
  - Praise for the helpfulness of staff and volunteers, and
  - More information or more relevant information about the artist and artwork.

Visitor Demographics

Image courtesy of Object Gallery

Australian Government

Australia Council for the Arts

Locations/Origins

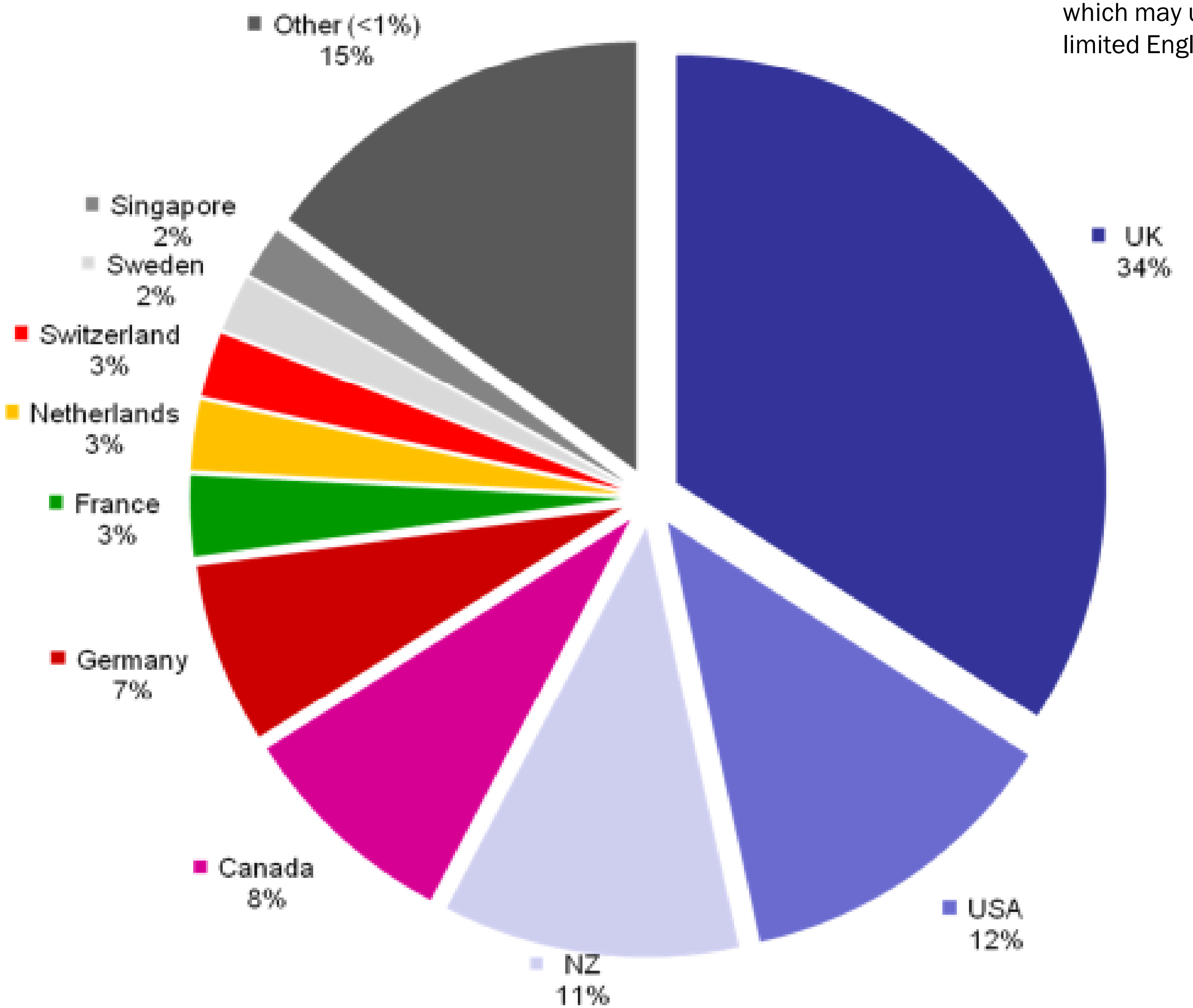
Breakdown by GALLERY REGION

All figures are %

- Overall the audiences of public galleries comprise a significant number of visitors who live within 5km of the gallery.
- However at the individual gallery-level, the proportion of visitors who live within 5km of the gallery can vary substantially, with some gallery's having as little as 10% of visitors living with 5km of the gallery, and some with up to 59%.
- The proportion of Interstate and International tourists can also vary between galleries – such as from 0% to 35% international tourists.
- At a broad level, the GSMA galleries show the highest proportion of tourists and South-East NSW the highest proportion with interstate tourists.

International Tourist Origins

- Most of the international tourists recorded were from English-speaking countries.
- It should be noted that the questionnaire was only available in English, which may underrepresent non-English speaking tourists or tourists with limited English.



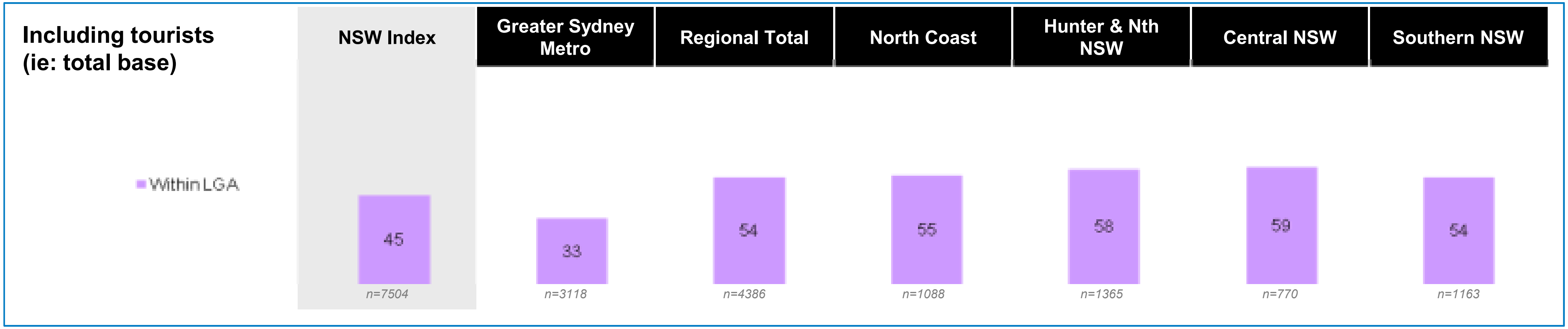
Countries with 1% or less of international tourist base	
Korea	Denmark
China	Austria
Spain	Brussels
South Africa	Bangladesh
Ireland	Thailand
Italy	PNG
Belgium	Egypt
Malaysia	New Caledonia
Japan	Portugal
India	UAE
Bermuda	Chile
Israel	Hungary
Brazil	Indonesia
Taiwan	Lebanon
Finland	Norway

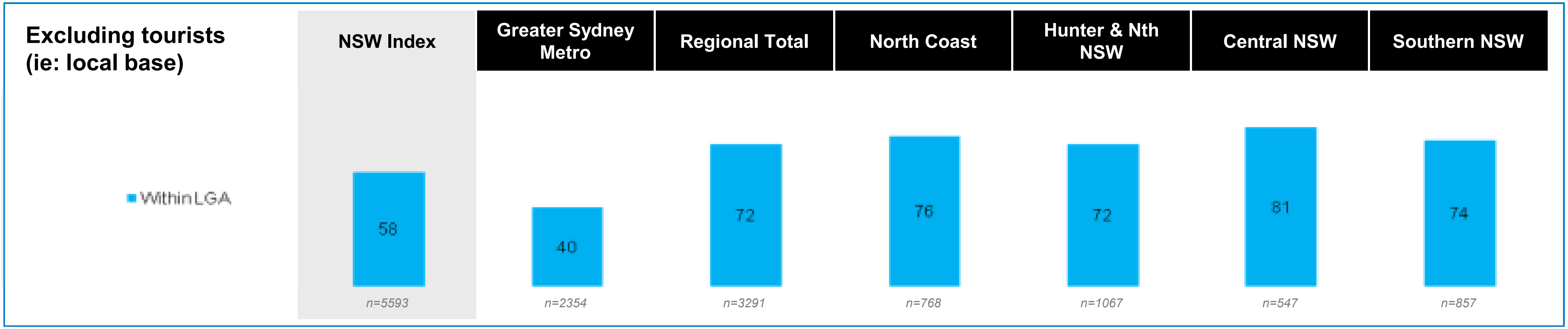
Base: All international visitors, all valid responses, n=511

LGA status

Breakdown by GALLERY REGION

All figures are %



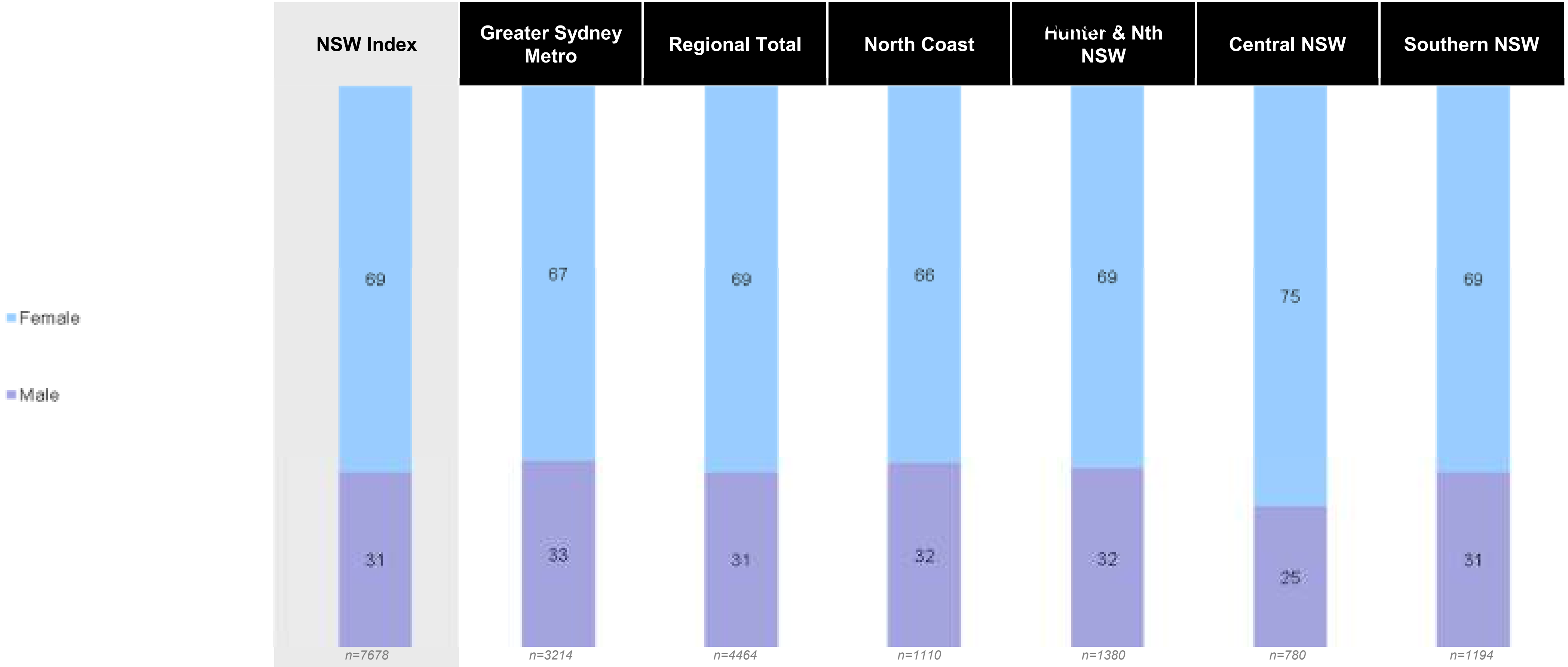


- The proportion living within the local government area (LGA) of the gallery follows a similar pattern across regions to those living within 5km of the gallery (shown earlier).
- Excluding tourists (including intrastate tourists from NSW), over half the visitor base live within the LGA, with the exception of the GSMA.
- Sydney-resident visitors in the GSMA are most likely to be crossing local government area boundaries to visit a public gallery.

Gender

Breakdown by GALLERY REGION

All figures are %

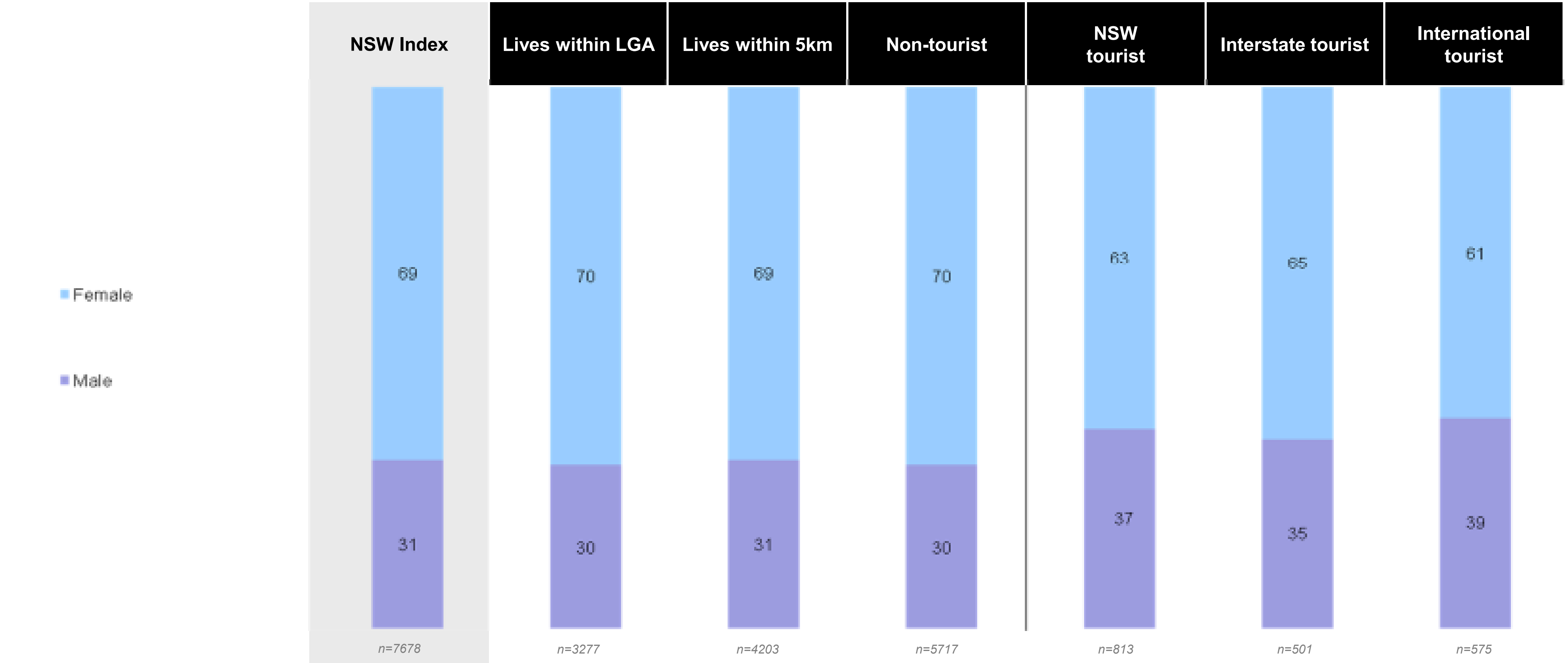


- Across the state, there is a consistent skew towards female visitors (69%), which is most pronounced in Central NSW (at 75%).
- Some galleries show a more equal distribution of gender coming close to parity (at 48% male).
- 80% female was the highest female skew recorded in a NSW public gallery.

Gender

Breakdown by VISITOR ORIGINS

All figures are %



- The female skew exists across different types of visitors.
- Tourists are slightly more likely to show an even gender balance (although still majority female at 61%).
- The more even gender balance amongst tourists may be due to a greater number of tourists coming to the gallery with a partner or spouse, who in turn are more likely to be male (as shown in the *Visitor Behaviours* section of this report).

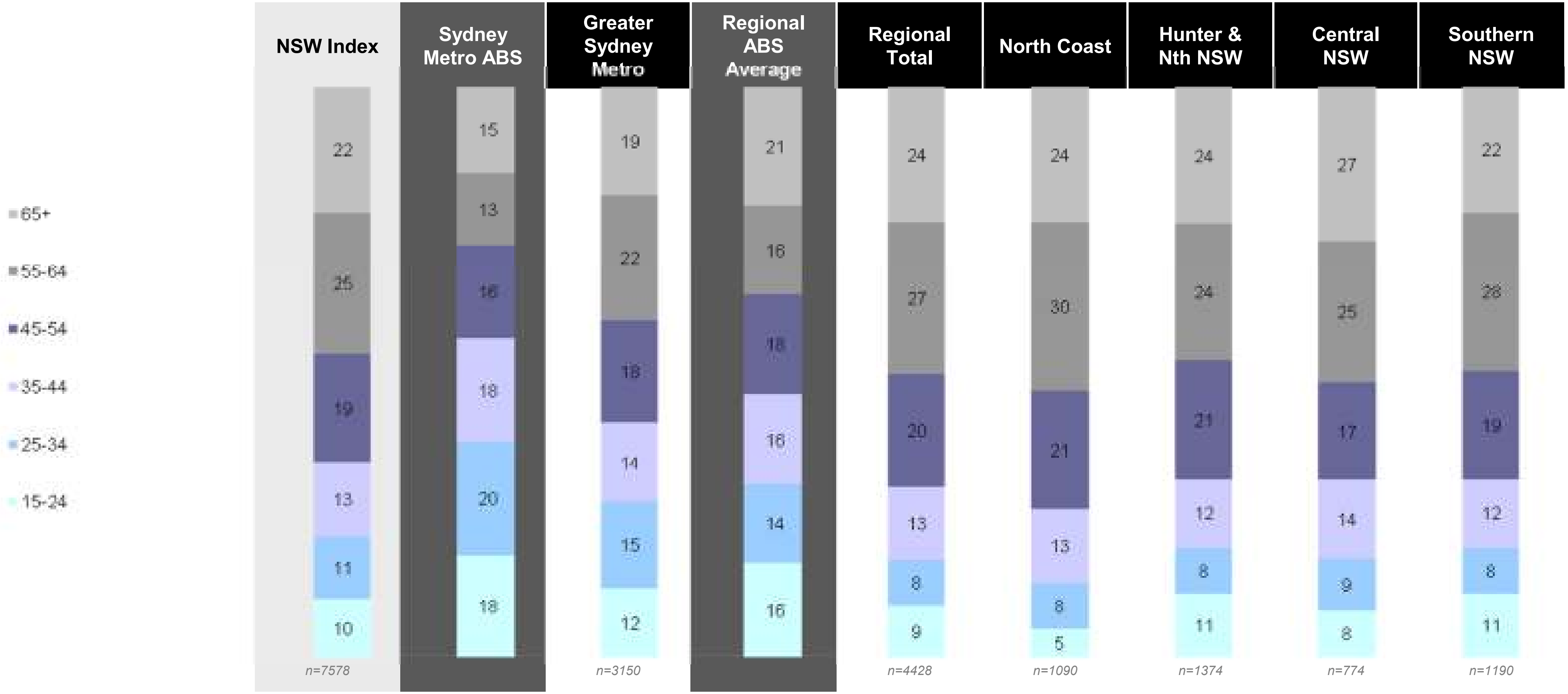
Q13. Are you Male or Female?

Base: All visitors, all valid responses

Age

Breakdown by GALLERY REGION

All figures are %



- *Note: Percentages *exclude* persons under 15 from the calculation (as gallery visitor sample excluded under 15's), even for ABS calculations shown.
- Across the regions, we see the average public gallery showing a skew significantly towards older visitors (namely the over 55's at 47%). This is perhaps less pronounced in galleries in the Greater Sydney Metro (37%), but the skew exists nonetheless.
- Generally, the skew in age seems to be driven by a lesser proportion of under 25's (and 25-34's) and a greater proportion of 55-64's.
- Visitors in the middle age bands 35-54 (ie: the "family-age bands"), do not differ as markedly from the ABS population distribution.

Age

Breakdown by VISITOR ORIGINS

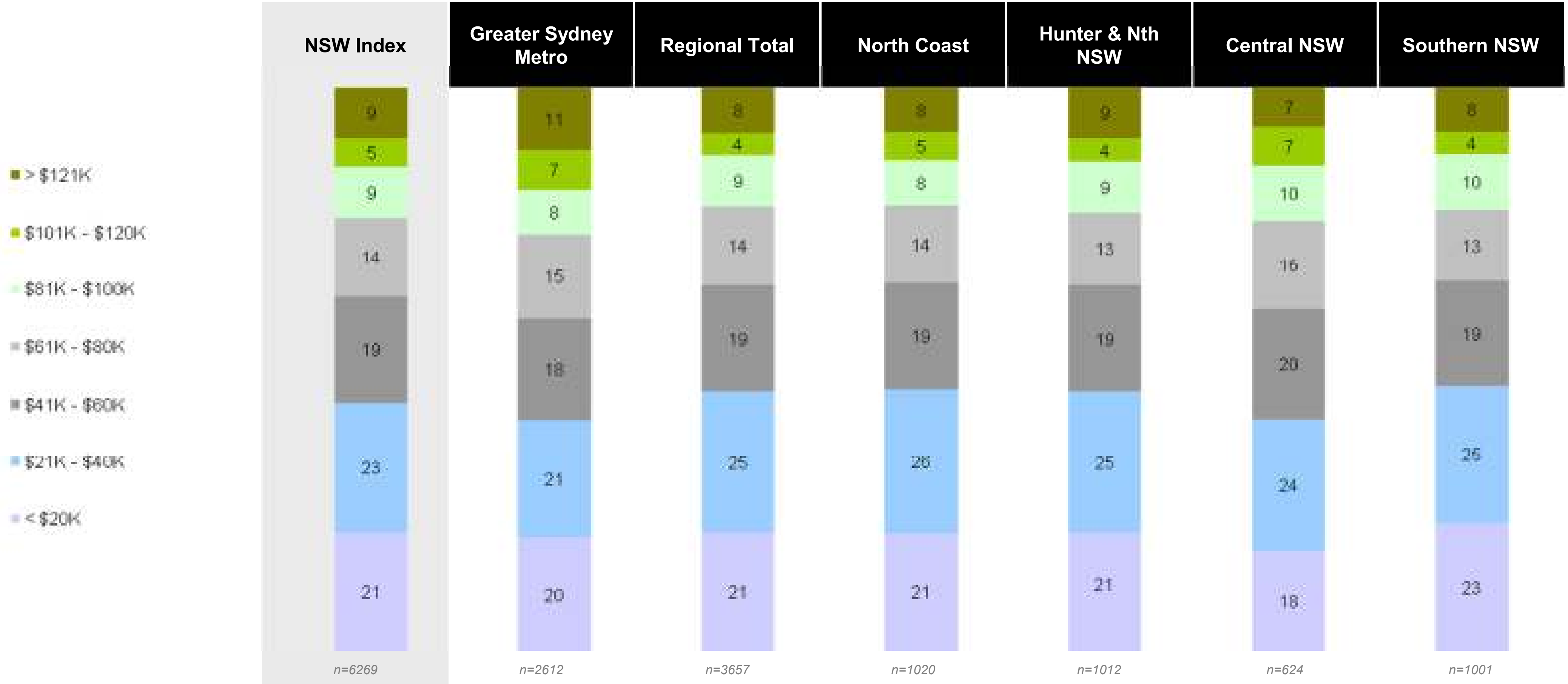
All figures are %

- International tourists skew markedly younger than any other grouping based on visitor origin, and this is principally driven by a greater proportion of 25-34's (21%) in the visitor base.
- By contrast, NSW tourists skew slightly older than non-tourists, driven by a greater proportion (30%) of 55-64's.

Income

Breakdown by GALLERY REGION

All figures are %



- Across regions, public galleries attract visitors from various households with differing gross annual incomes, supporting the view that public galleries are an accessible cultural activity for all socio-economical levels.
- Note: Around 25% of respondents chose not to answer this question (and are excluded from the calculation). This is consistent across regions. Market research practise shows the refused income information does not skew higher or lower incomes, and this is assumed to be the case here.
- ABS data for gross annual household income is calculated on a scale different from that used in the survey, but the distribution within the gallery population is not markedly different from the general population.

Occupation

Breakdown by GALLERY REGION

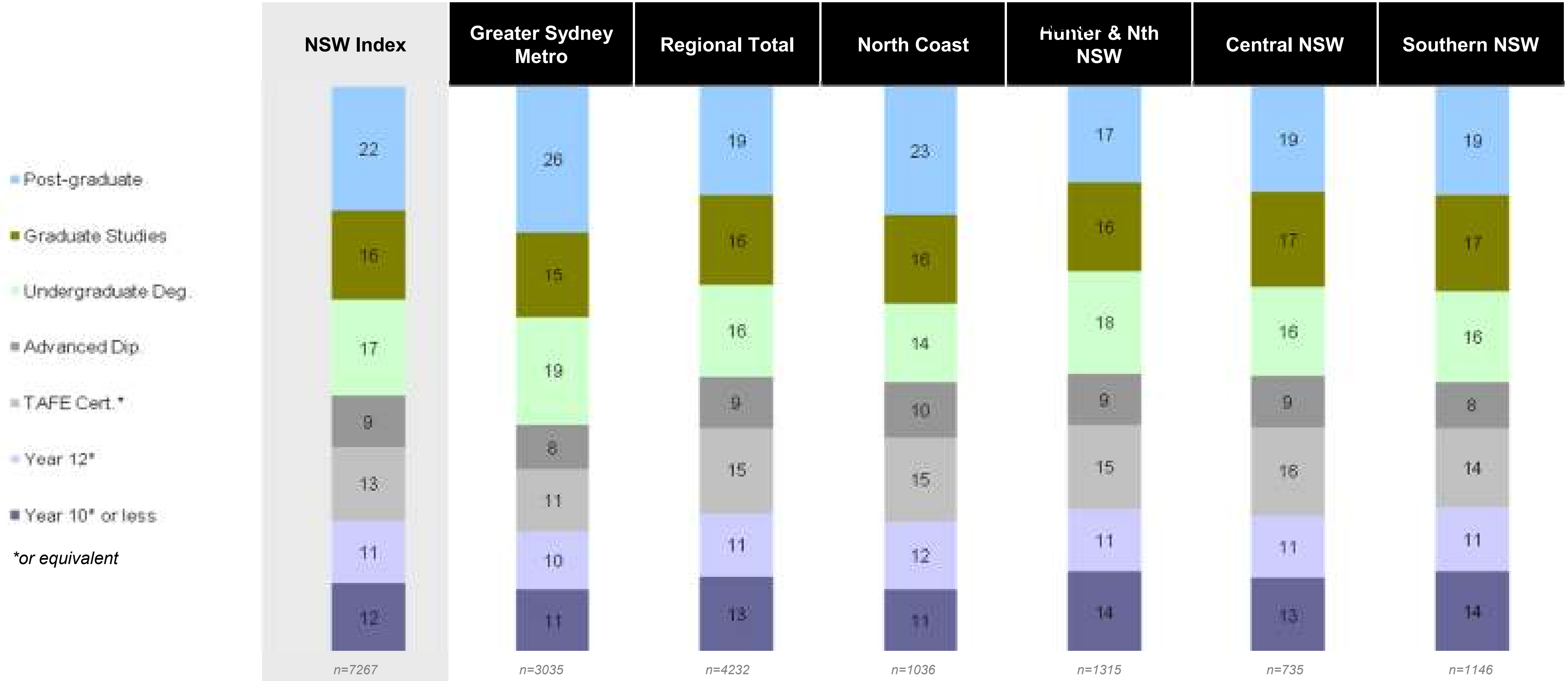
All figures are %

- The proportion of full-time workers and retirees varies across regions. GSMA shows the highest proportion of full-timer workers (33%) and the lowest proportion of retirees (24%) amongst gallery visitors, whereas visitors to galleries in the North Coast region are most likely, on average, to be retired (31%).
- The proportion of students is fairly consistent across regions (8-9%), with the North Coast and Central NSW regions showing slightly less students (6-7%).
- The regions are least likely to vary with respect to the proportions of part-time workers (15-17%), the self-employed (8-11%), “home-duties” (7-9%) and the unemployed (1-2%).

Education

Breakdown by GALLERY REGION

All figures are %



- Across regions, different education levels are all represented amongst gallery-goers.
- The biggest difference in education level is for the GSMA which shows the highest proportion of visitors having completed post-graduate studies (26%). The North Cost is not far off either at 23% post-graduate qualified visitors.
- Recent ABS data (62227.0 – Education and Work Nov 2010) shows that 23% of Australians between 15-64 hold a bachelor's degree or higher. Public gallery visitors in NSW are much more likely to hold a bachelor's degree or higher (at 55%).

Diversity

Breakdown by GALLERY REGION & TOURIST TYPE

All figures are %

				GALLERY REGION						TOURIST TYPE	
		NSW Index	NSW ABS Census 2006	Greater Sydney Metro	Regional Total	North Coast	Hunter & Nth NSW	Central NSW	Southern NSW	Interstate tourist	Inter-national tourist
Language other than English at home*	*Amongst ALL visitors*	15%	-	23%	9%	10%	9%	8%	10%	10%	42%
	Amongst ONLY NSW visitors	13.0%	21.3%	20.7%	8.0%	9.1%	7.6%	6.8%	8.6%	-	-
Indigenous	*Amongst ALL visitors*	2%	-	2%	2%	2%	2%	2%	3%	3%	1%
	Amongst ONLY NSW visitors	2.4%	2.2%	2.5%	2.3%	1.9%	2.2%	1.5%	3.2%	-	-
Disability that "impacts on their visit"**	*All visitors*	4%	-	4%	4%	4%	4%	3%	4%	4%	2%

- At a regional level, public galleries across each region are attracting a relatively even number of indigenous visitors. This varies at the individual gallery level, with some galleries reporting no indigenous visitation, and others with up to 8% indigenous visitors.
- Note: NSW ABS figure is based on 2006 Census, and includes those under 15 years.
- GSMA attracts a proportion of Language Other Than English at home (LOTE) visitors fairly consistent with the 2006 census data. The regional total is also reasonably consistent with the 2006 census data (9%) though this can vary from individual gallery to gallery.
- *Note: the questionnaire for this survey was only available in English, which may have biased against LOTE visitors.
- **Note: No ABS data available for comparison to the disability question.

Q14. Aboriginal or Torres Strait Islander descent?

Q15. Language other than English…?

Q26. Disability or other condition?

Base: Either ALL visitors or WITHIN NSW (as shown), valid responses only

Visitor Behaviour

M&G NSW

Image courtesy of Hazelhurst Regional Gallery

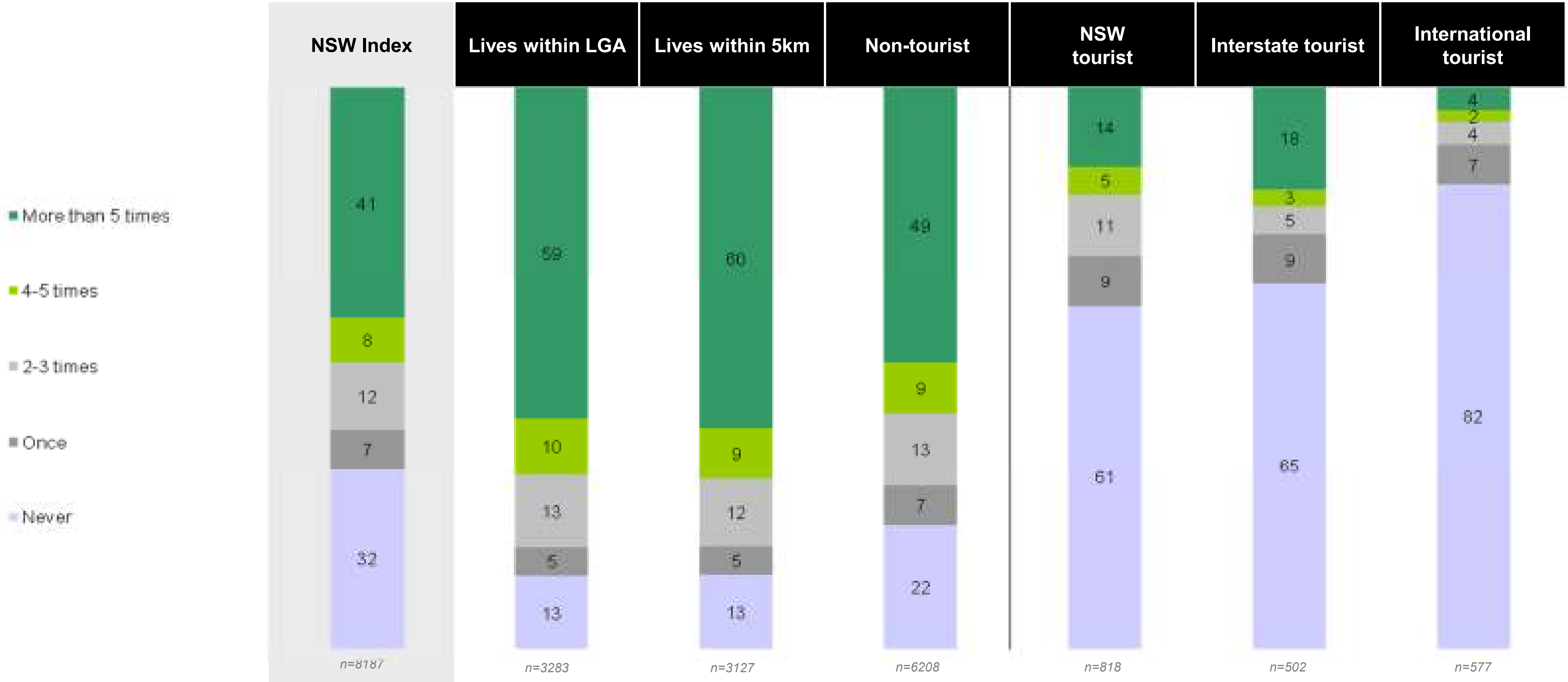
Australian Government

Australia Council for the Arts

Number of times visited

Breakdown by VISITOR ORIGINS

All figures are %

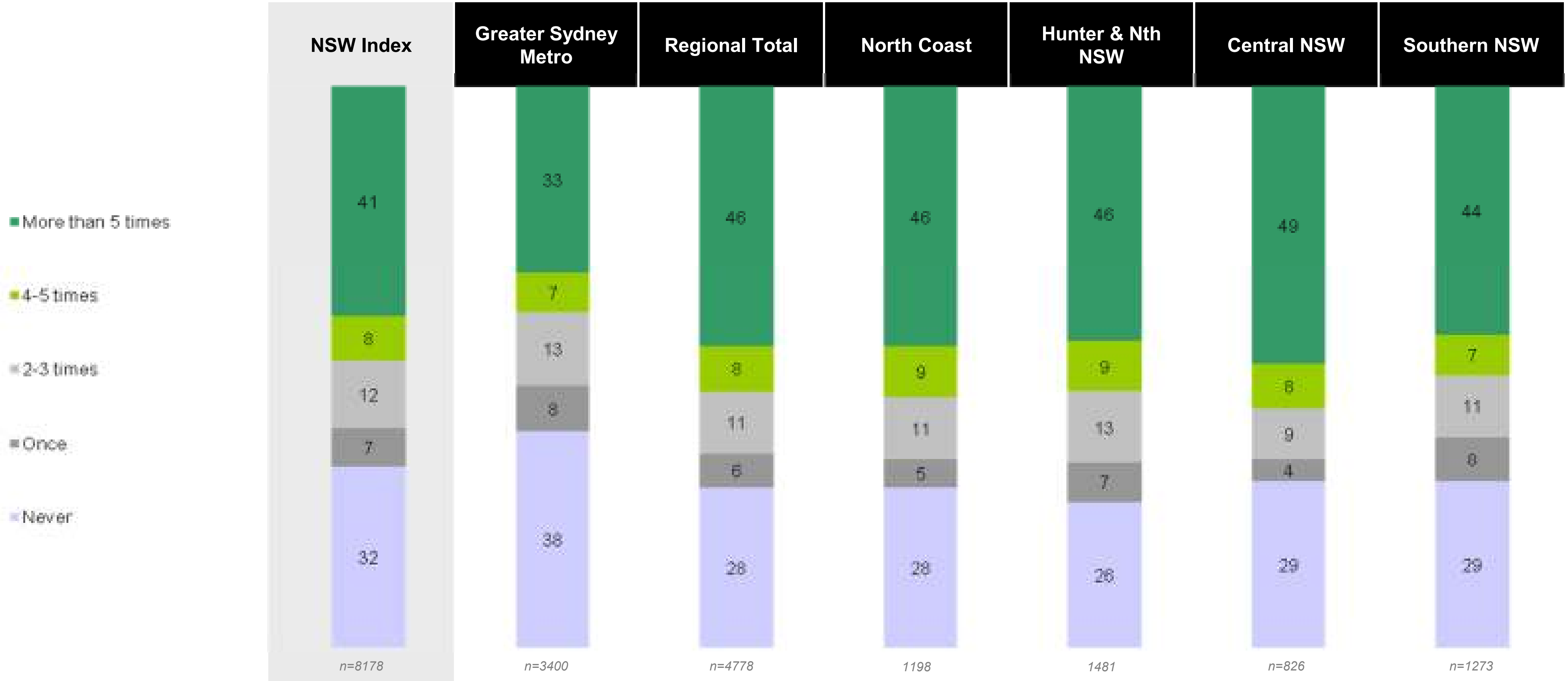


- Tourist status has the greatest influence on the proportion of repeat and first-time visitors. Over 4 in 5 international tourists are first-time visitors.
- Just under 2 in 3 domestic tourists are first-time visitors, but this leaves around 1 in 4 domestic tourists who are return visitors, and of these a large proportion have been at least twice to the gallery before.
- Living closer to the gallery increases the likely of visiting more than 5 times before in the past (at least 50% for those within 5km or the LGA of the gallery).

Number of times visited

Breakdown by REGION

All figures are %



- First-time visitors make up around a third of visitors for the average public gallery in NSW.
- The slightly higher proportion of first-timers in GSMA due partly to its larger tourist base, but not exclusively (as shown overleaf in the analysis excluding tourists).
- All regions are showing a similar proportion of visitors who have been 2-5 times before in the past.
- There is a sizeable proportion of visitors (in most cases nearly half the visitor base, with the exception of GSMA at 33%) who have been more than 5 times before.

Q1. How many times have you visited the gallery before today? *Base: All visitors, valid responses only*

Number of times visited

Breakdown by REGION – NON-TOURISTS ONLY

All figures are %

- Limiting the analysis to the non-tourists (ie: excluding tourists from the sample), the proportion of first-timers drops across regions to between 15-18% (or just over 1 in 8 visitors).
- The exception is GSMA, which shows a higher proportion of first-timers (30%) and a lower proportion of those who have visited the gallery more than 5 times before amongst the non-tourist base. This could partly be due to the concentration of alternative public galleries in the region and a slightly younger age profile.

Number of times visited

Breakdown by AGE X GENDER – NON-TOURISTS ONLY

All figures are %

- Age has a correlation with the number of times a visitor has been to the gallery in the past.
- There are no substantial differences of gender, with men and women equally likely to be visiting the gallery the same number of times across age groups . The only exception being the over 65+ females who are more likely than men to have visited the gallery more than 5 times in the past (62% vs. 53% respectively).

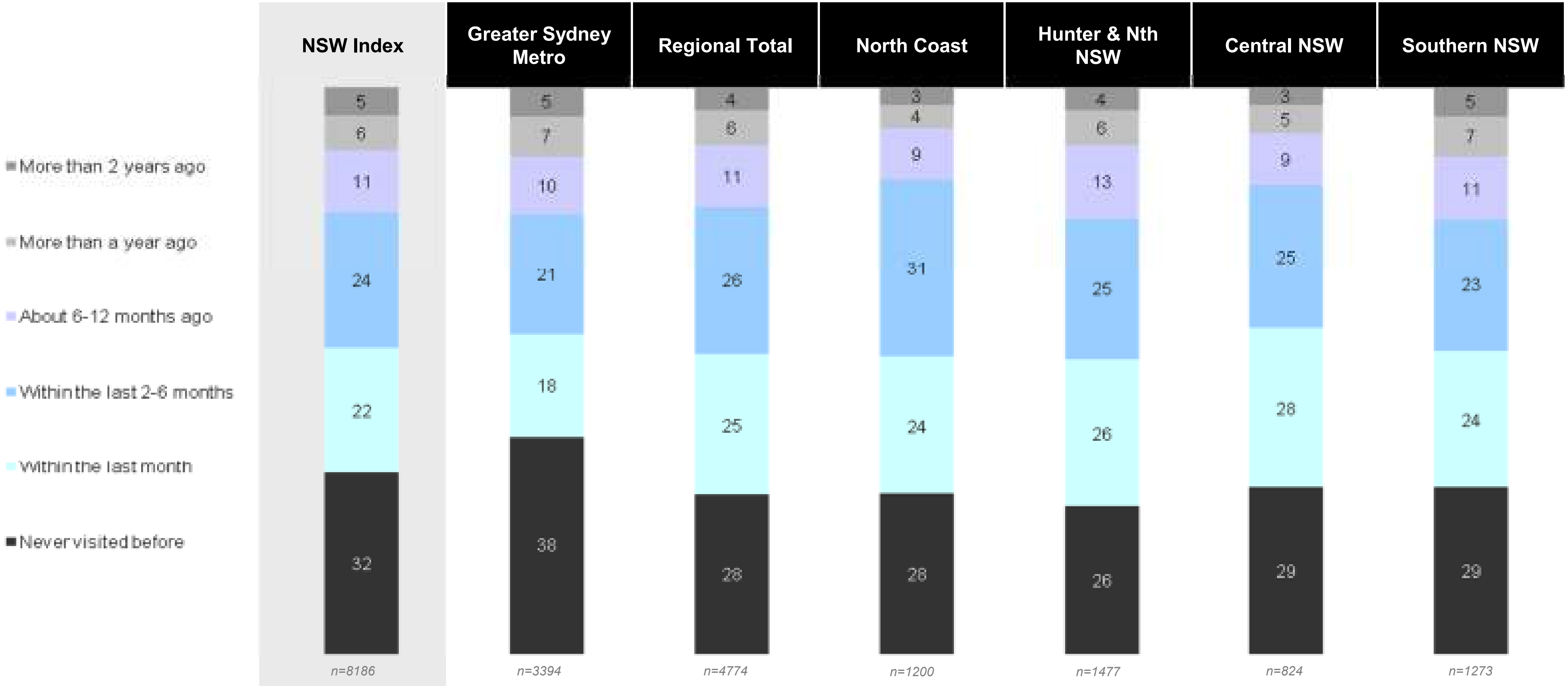
Q1. How many times have you visited the gallery before today?

Base: All non-tourist visitors, valid responses only

When last visited

Breakdown by REGION

All figures are %

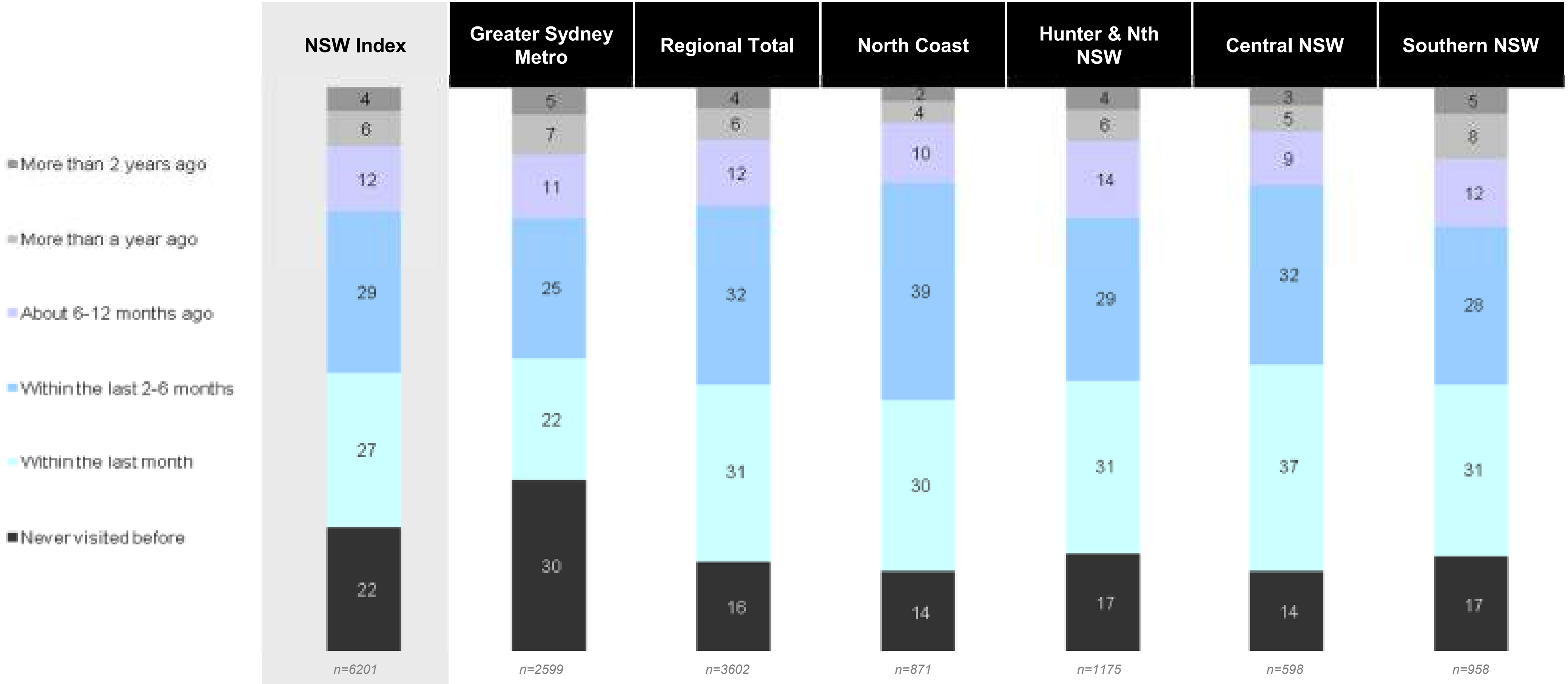


- Across regional profiles, *of those who are <u>repeat visitors</u> to the gallery* (ie: excluding those who have "never visited before") the majority (around two-thirds) are returning to the gallery within a six-month period.

When last visited

Breakdown by REGION – NON-TOURISTS ONLY

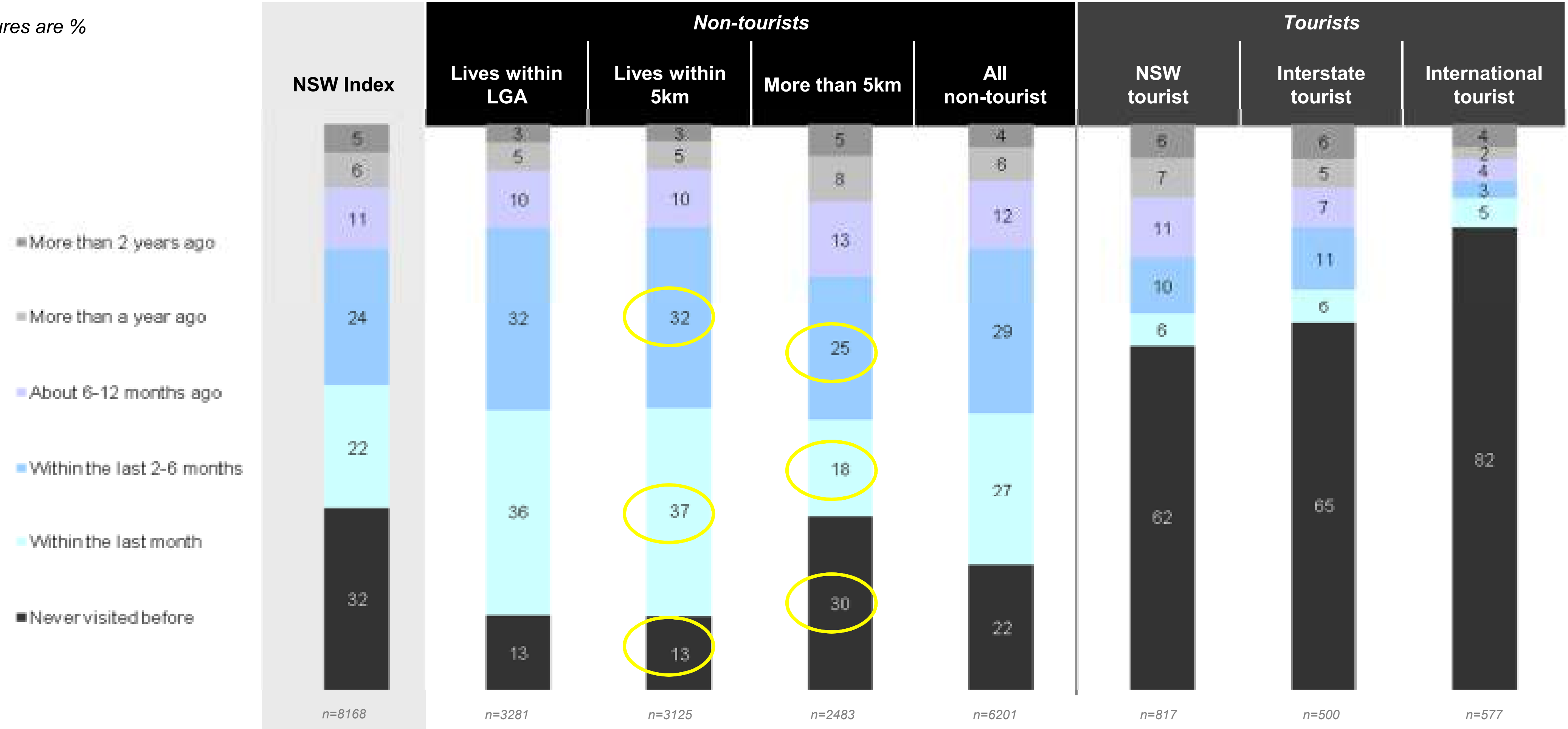
All figures are %



When last visited

Breakdown by VISITOR ORIGINS

All figures are %

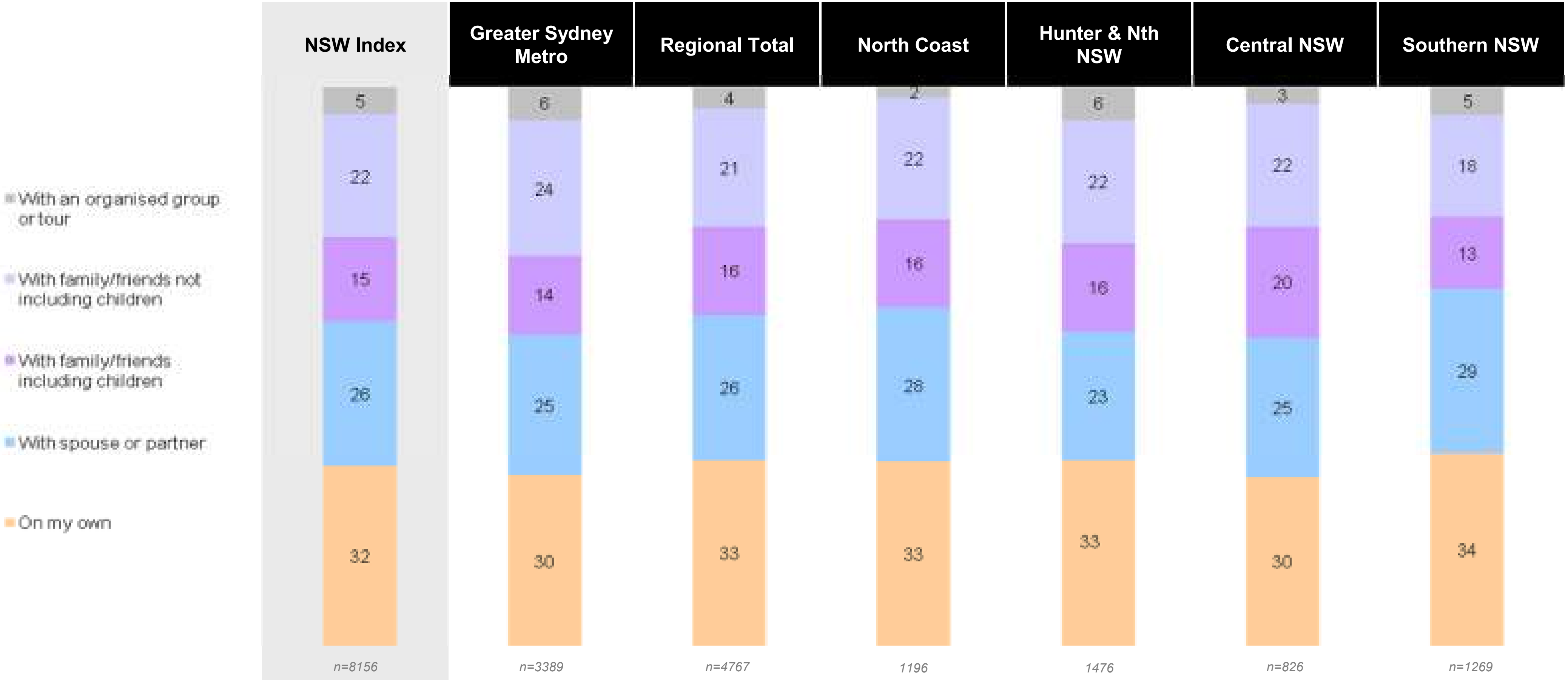


- Non-tourists who live more than 5km away from the gallery are more likely to be first-time visitors compared to those who live within 5km of the gallery.
- Furthermore, "non-tourists" who live more than 5km from the gallery are returning to the gallery less often.
- Visitors living more than 5km away from the gallery return less frequently then those who live within 5km of the gallery (amongst the non-tourists).

Who visiting with

Breakdown by REGION

All figures are %



- The social arrangements do not differ widely by region, with around 1 in 3 visitors across regions visiting by themselves and around a quarter coming with a spouse/partner.
- Note: a maximum of 2 visitors from any group or tour were surveyed in any particular group as part of the sampling methodology, so the absolute proportion of group/tour visitors may in fact be higher.

Who visiting with

Breakdown by AGE x GENDER

All figures are %

- Younger people are generally more likely to come to the gallery with friends or family not including children. Females under 25 are most likely group to be visiting in this arrangement (42%).
- Men in general, at each age level respectively, are more likely to be coming along with a spouse or partner than women, and this effect is most pronounced in the older age brackets. This suggests that men are more likely to be coming because of a female spouse/partner than the converse.
- Men however are no less likely than their female counterparts to be coming on their own, and in fact for the under 45's men are more likely to be coming on their own to the gallery compared to their female peers of the same age group.

Who visiting with

Breakdown by VISITOR ORIGINS

All figures are %

- Non-tourists are more likely than tourists to be visiting on their own compared to tourists.
- On the flip side, tourists are more likely to be coming to the gallery with a spouse or partner compared to non-tourists.
- Those who live close to the gallery (within the LGA or within 5km) are more likely to visit the gallery by themselves.

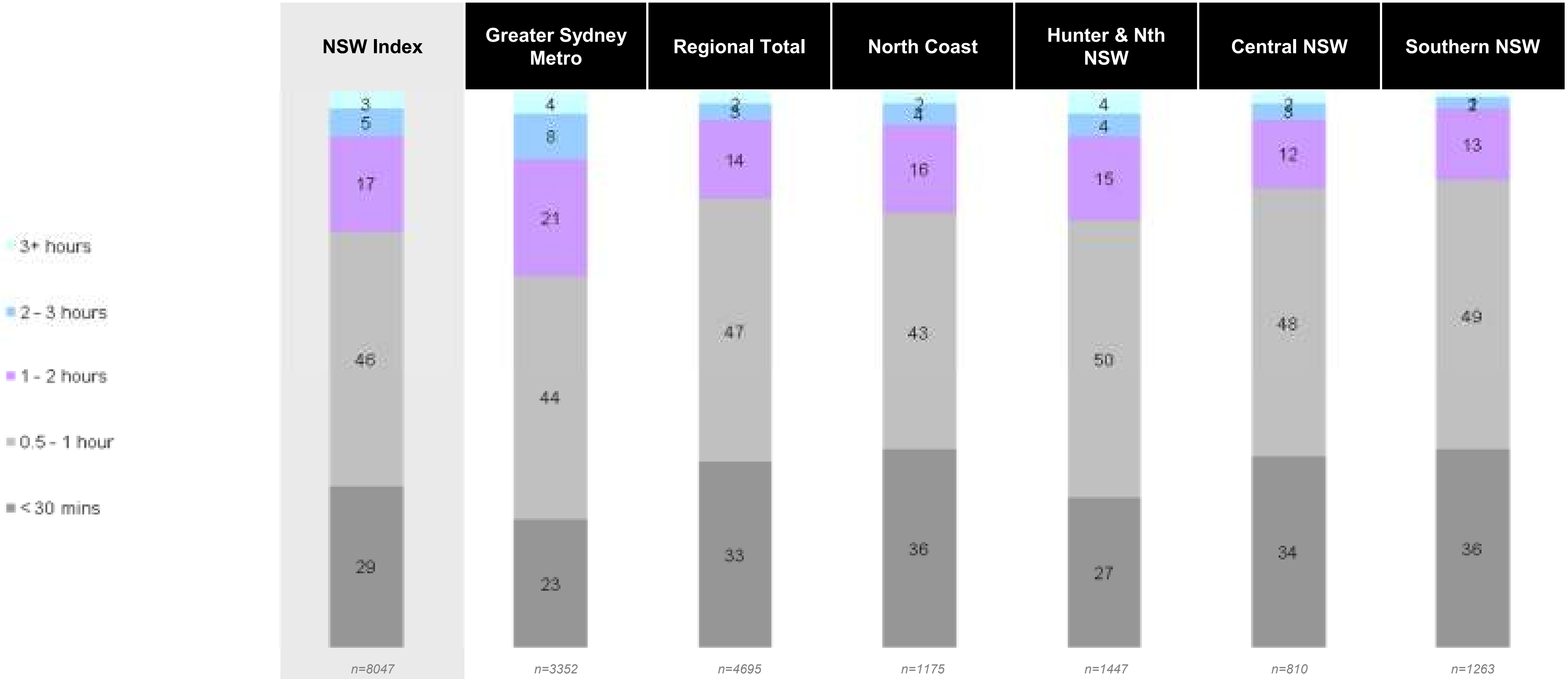
Q3. Who are you visiting with today?

Base: All visitors, valid responses only

Length of visit

Breakdown by REGION

All figures are %

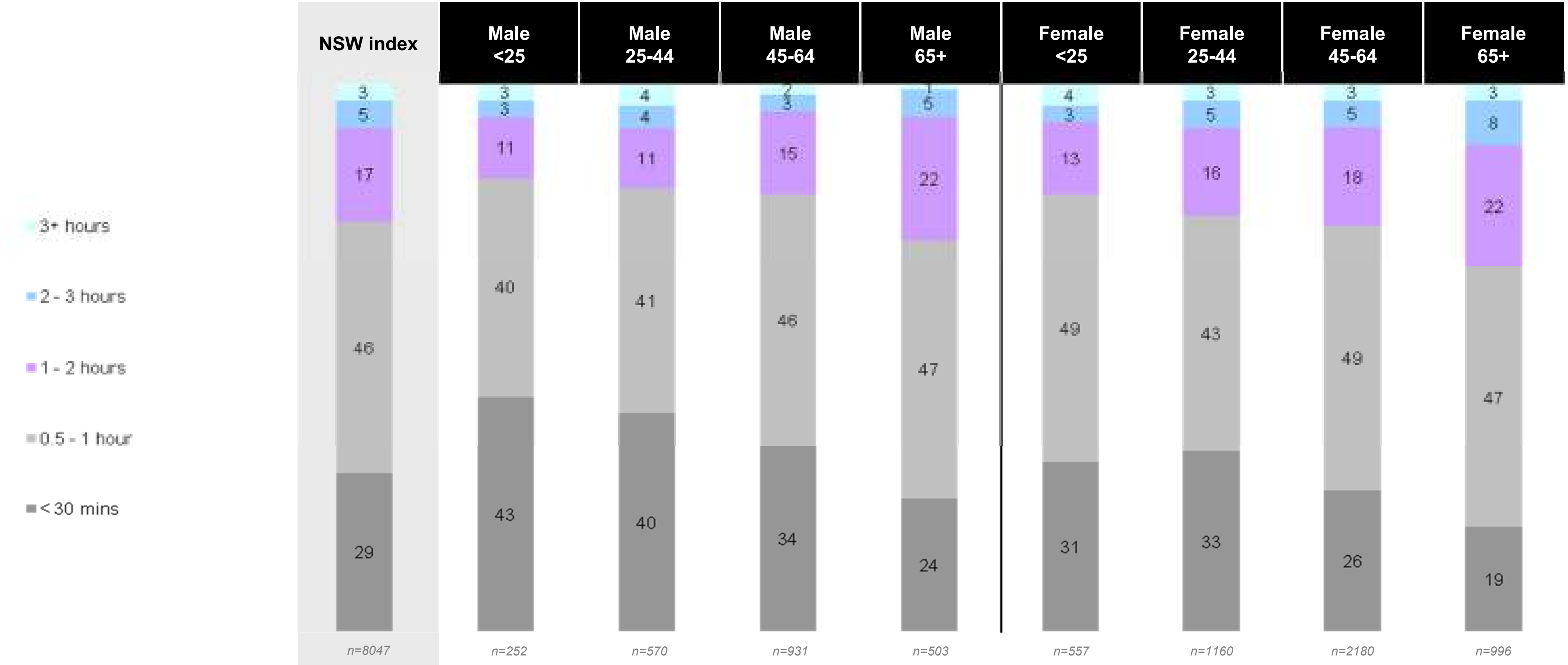


- Across the state, most visitors (75%) are spending less than an hour at the average gallery.
- Visitors are spending slightly longer on average at galleries in the GSMA , with 1 in 3 visitors staying longer than an hour. This is likely to be caused by a number of physically larger galleries within the GSMA compared to the regions.

Length of visit

Breakdown by AGE x GENDER

All figures are %

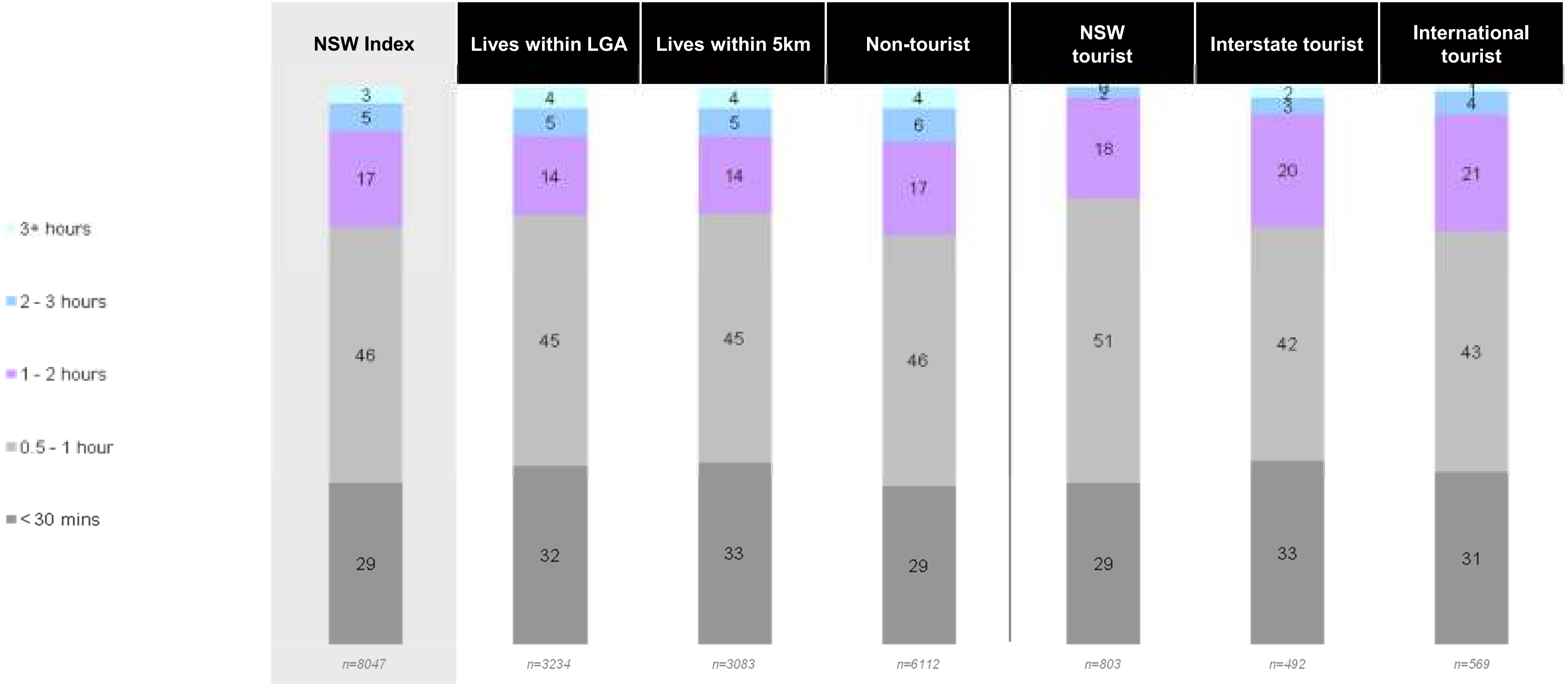


- Time spent in the gallery varies by age and by gender.
- Younger visitors on average are spending less time in the gallery than older visitors. After the age of 45, visitors are more likely to be spending longer in the gallery.
- Men are more likely than women (of all age groups) to be spending less time in the gallery regardless of age. Around 2 in 4 males under 45 are spending less than 30 minutes in the average gallery.

Length of visit

Breakdown by VISITOR ORIGINS

All figures are %

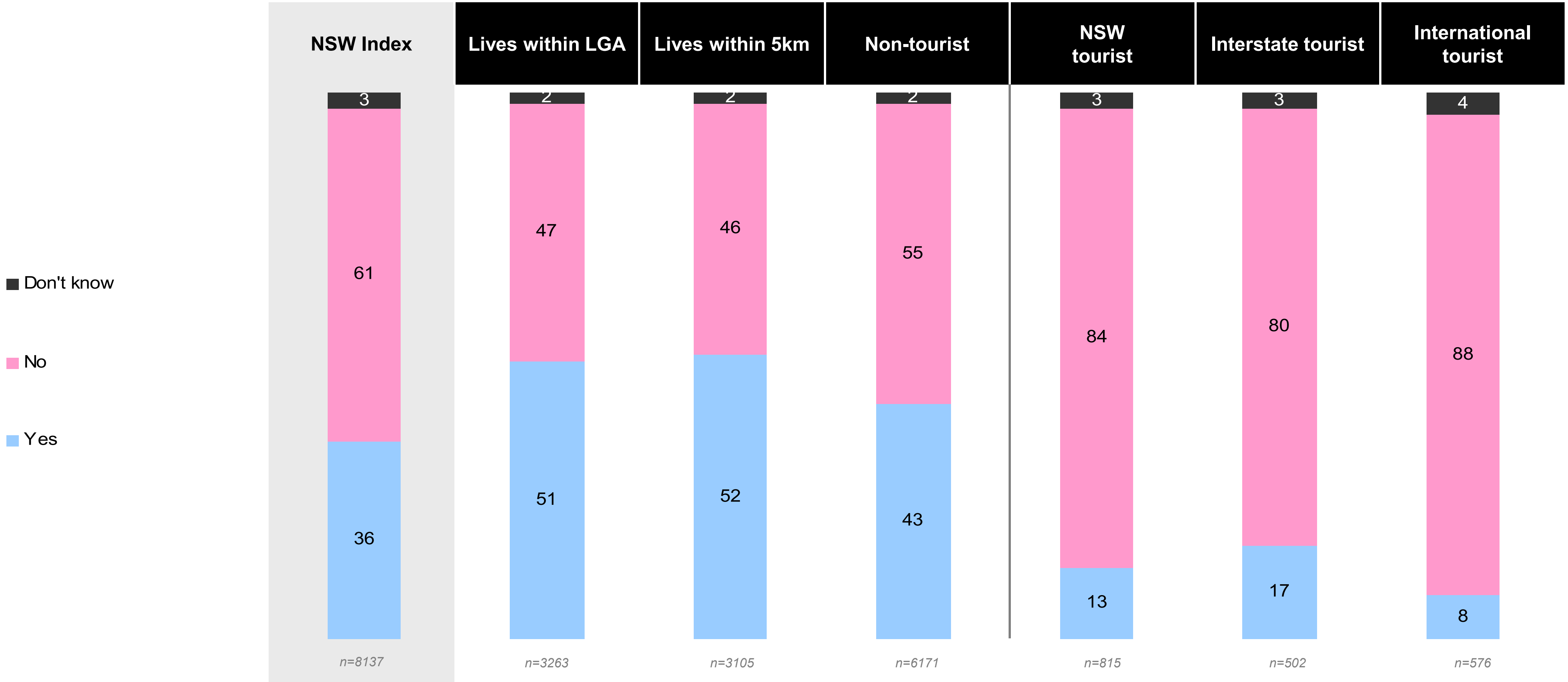


- Time spent in the gallery does not vary markedly by the type of visitor (tourist or non-tourist) with the majority of the audience spending 30-60 minutes in the gallery.
- For most galleries it is the provision of additional services eg café, workshops that extend the visitors stay.

Attendance at public program

Breakdown by VISITOR ORIGINS

All figures are %



- Overall, the average gallery has around 1 in 3 of its visitors having been to a public program at the gallery before.
- Around 1 in 2 visitors who live within 5km of the gallery (or within the LGA) have attended a public program.
- Being a non-tourists, as expected, correlates with visitors more likely to have attended a public program at the gallery. Nonetheless around 1 in 10 tourists (or a member of their family) has attended a workshop, talk or group activity at the gallery.

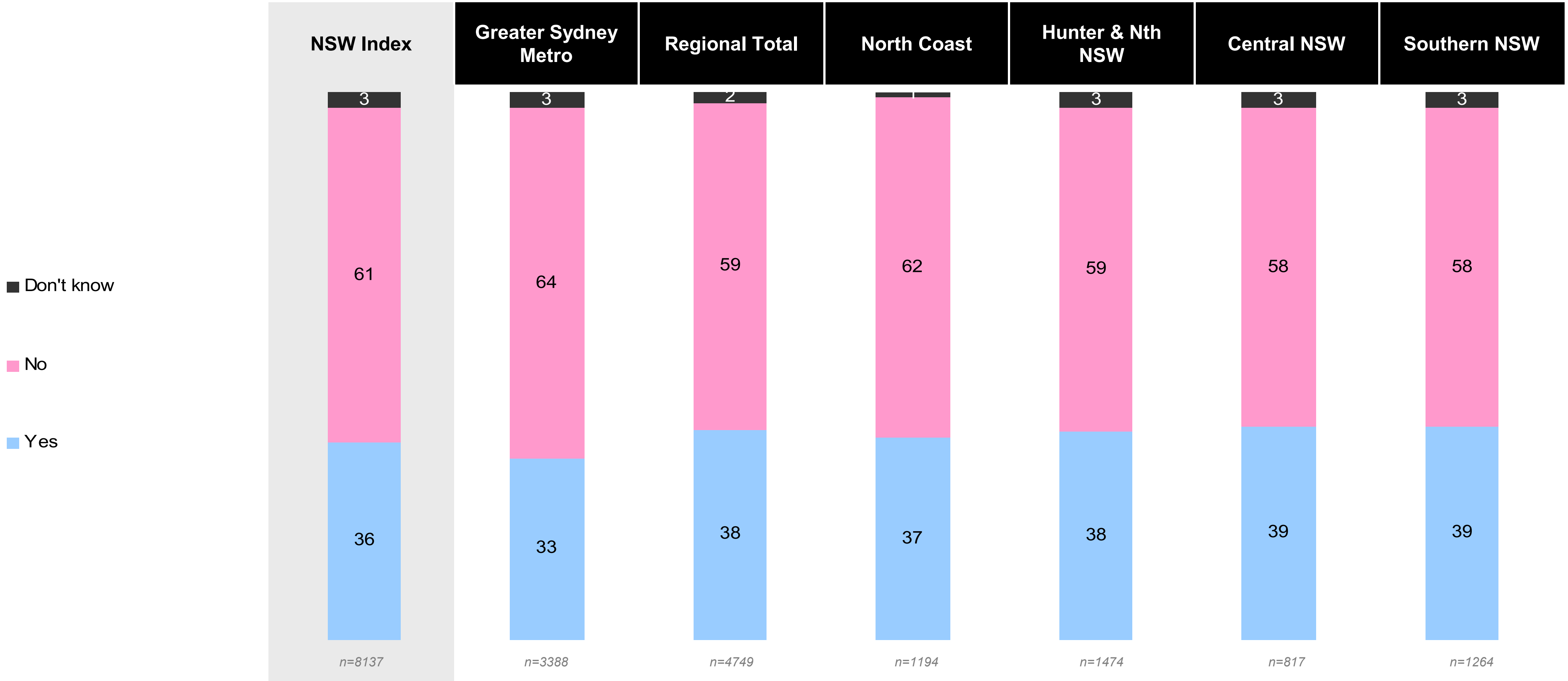
Q5. Have you or any member of your family ever been to a workshop, talk or group activity at this gallery before today?

Base: All visitors, valid responses only

Attendance at public program

Breakdown by REGION

All figures are %



- Visitation rates at galleries does not vary markedly with region. The drop in attendance shown over for the GSMA can be accounted for by Sydney's higher proportion of tourist visitors.

Attendance at public program

Breakdown by AGE X GENDER

All figures are %

- Age and gender does play a role in past attendance at a public program.
- Women are more likely than men to have attended a public program at the gallery at some point, and older women are more likely to attend programs than younger women. In fact, on average 43% of women over the over of 65 have attended a workshop talk or group activity at the respective gallery.

Q5. Have you or any member of your family ever been to a workshop, talk or group activity at this gallery before today?

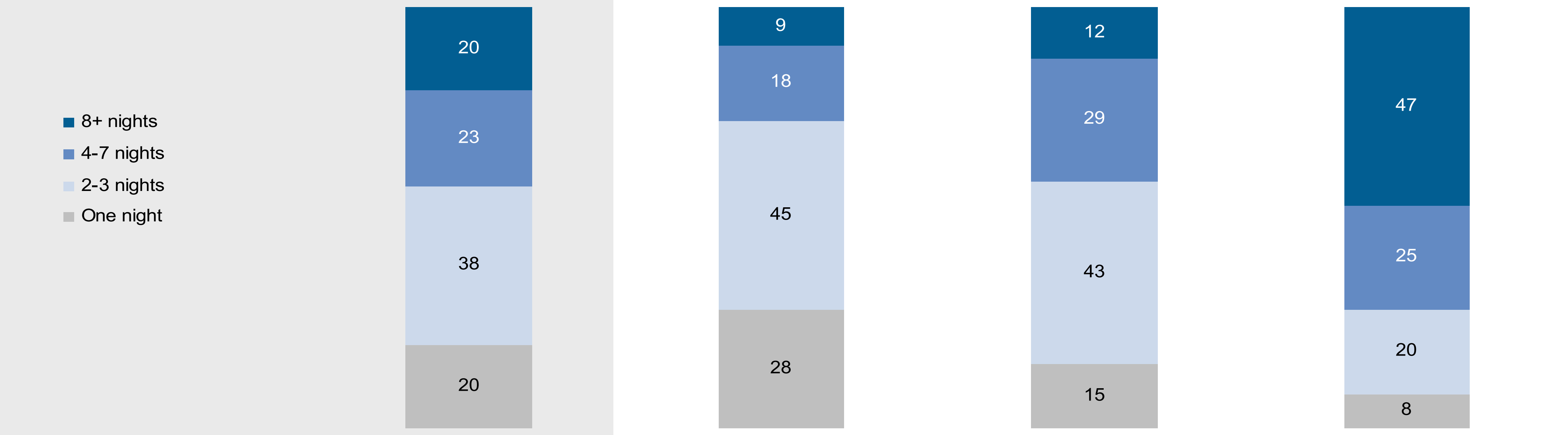
Base: All visitors, valid responses only

Tourist – length of stay in region

Breakdown by TOURIST TYPE

All figures are %

Length of visit	TOTAL	NSW tourists	Interstate tourists	International tourists



Who staying with?

	TOTAL	NSW tourists	Interstate tourists	International tourists
Home of friend or relative	**47%**	**48%**	**45%**	**47%**
Paid accommodation	**53%**	**52%**	**55%**	**53%**

- As expected, international tourists are staying in town the longest (nearly 50% staying longer than a week).
- However, the type of accommodation (friend or hotel) is relatively consistent across tourist type.
- Recent ABS data (8035.0 Tourist Accommodation) identifies the average length of stay in establishments with more than 15 rooms as 2.2 days

Q22 If you are a visitor to the region – how long are you staying in the area? &
Q23 Are you staying in paid accommodation

Base: All visitors, valid responses only n=1765

Information & Marketing

Image courtesy of Blacktown Arts Centre

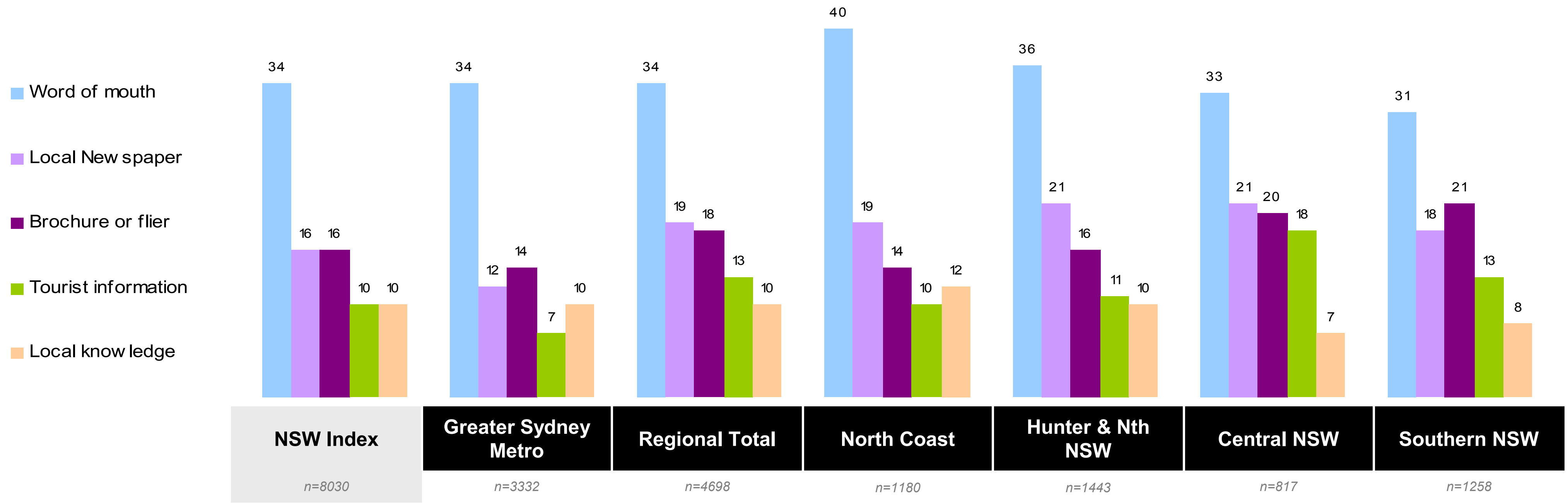
Australian Government

Australia Council for the Arts

Source of information

Breakdown by REGION – Top 5 (overall) sources of information

All figures are %



- Across regions, word of mouth is the most common source of information about the average gallery.
- Galleries in Central NSW are more likely to rely on tourist information than other regions in NSW (and Central NSW has no greater proportion of tourists compared to the other regions).
- The local paper in GSMA is having less of an influence compared to other regions, which can be attributed the greater communication via the metropolitan newspaper (eg: SMH, Telegraph) in this region. GSMA also relies less on the brochure/flier compared to other regions .
- A full-list of the source of information is shown overleaf by region.

Source of information

Breakdown by REGION - Most cited

All figures are %

Key differences highlighted in yellow	NSW Index	Greater Sydney Metro	Regional Total	North Coast	Hunter & Nth NSW	Central NSW	Southern NSW
	n=8030	*n=3332*	*n=4698*	*n=1180*	*n=1443*	*n=817*	*n=1258*
Word of mouth	34	34	34	40	36	33	31
Local/community newspaper	16	12	19	19	21	21	18
Brochure/flier	16	14	18	14	16	20	21
Tourist Info	10	7	13	10	11	18	13
Local knowledge (iive nearby + passing by)	10	10	10	12	10	7	8
Sign/billboard or banner	9	10	8	7	10	6	8
Invitation/free ticket	8	9	7	5	7	7	9
Major metro newspaper	7	10	5	4	6	4	4
Info on Internet	6	8	5	4	4	3	8
Radio	4	1	5	4	6	6	6
Poster	4	3	4	2	3	5	5
Regular visitor	3	2	3	3	3	4	2

- Regions also vary by the influence of the Internet, with GSMA and South-East NSW the regions most likely to rely on the Internet as a source of information.
- The average gallery in GSMA is also less reliant on radio as a source of information compared to other regions.
- Many of the differences between regions with respect to the source of information can be attributed to differing demographics and proportions of tourists in the audience base.

Source of information

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow

	NSW index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-34	Female 45-64	Female 65+
	n=8030	*n=254*	*n=565*	*n=929*	*n=499*	*n=562*	*n=1161*	*n=2196*	*n=993*
Word of mouth	34	46	34	33	30	40	35	33	36
Local/community newspaper	16	14	8	15	20	10	15	18	24
Brochure/flier	16	8	12	14	20	13	15	19	20
Tourist Info	10	8	9	12	16	8	9	9	11
Local knowledge (live nearby + passing by)	10	13	14	11	8	9	10	9	7
Sign/billboard or banner	9	11	12	10	11	9	9	7	7
Invitation/free ticket	8	4	7	8	9	5	8	9	9
Major metro newspaper	7	3	5	8	5	6	7	8	8
Info on Internet	6	8	9	5	5	8	8	6	4
Radio	4	1	2	5	6	2	2	3	7
Poster	4	3	4	3	6	6	4	3	3
Regular visitor	3	1	2	2	4	1	1	3	3

- Across age groups, word of mouth is still a dominant force, but the under 25's are particularly influenced by word of mouth compared to other age groups (in excess of 40%).
- Older visitors over 65- years are the age group most likely to be influenced by the local newspaper and brochures/fliers/printed materials.
- Younger visitors, under 35, are more likely to be influenced by information on the Internet compared to older visitors.
- Major metropolitan newspapers appear to be influencing the key demographic segments relatively equally.

Source of information

Breakdown by VISITOR ORIGINS

All figures are %

Key differences highlighted in yellow	NSW Index	Lives within LGA	Lives within 5km	All non-tourist	NSW tourist	Interstate tourist	International tourist
	n=8030	n=3221	n=3057	n=6075	n=816	n=493	n=574
Word of mouth	34	34	34	35	37	32	31
Newspaper (local/community)	16	20	20	20	6	4	1
Brochure or flier	16	26	25	18	12	11	7
Tourist information/publication	10	6	6	6	21	22	31
Sign/billboard/banner	9	9	9	8	10	12	14
By invitation or free ticket	8	11	11	10	2	2	1
Newspaper (major metropolitan)	7	6	7	8	3	3	3
Information on the Internet	6	6	7	7	5	5	3
I was passing by (local knowledge)	5	4	5	4	4	8	11
Radio	4	6	5	5	2	1	0
Poster	4	5	5	4	2	2	2
I live locally (local knowledge)	3	5	5	3	1	2	1
Regular visitor	3	3	4	3	2	2	0

- Word of mouth is a dominant influencer across tourist types.
- Brochures/fliers are connecting with non-tourists the most (18%) and international tourists the least (7%). The reverse is true of sign/billboards/banners which are most likely to be influencing international tourists (14%) and less likely to be influencing non-tourists (8%).
- Just passing by is also a more likely influencer for interstate and international tourists.
- Tourist brochures are cited by both tourists and non tourists.

Q6. How did you hear about this gallery or this exhibition? *Base: All visitors, valid responses only*

Source of information

Breakdown by REGION – NON-TOURISTS ONLY

All figures are %

Key differences highlighted in yellow	NSW Index	Greater Sydney Metro	Regional Total	North Coast	Hunter & Nth NSW	Central NSW	Southern NSW
	n=6067	*n=2533*	*n=3534*	*n=855*	*n=1143*	*n=591*	*n=945*
Word of mouth	36	35	36	38	36	35	37
Local/community newspaper	20	14	24	24	25	27	23
Brochure/flier	18	16	20	16	18	23	23
Tourist Info	10	11	9	6	8	10	12
I was passing by	4	5	4	6	4	3	3
Sign/billboard or banner	8	8	8	7	10	5	7
Invitation/free ticket	10	11	9	6	8	10	12
Major metro newspaper	8	12	5	5	7	5	5
Info on Internet	7	9	5	5	4	3	9
Radio	5	2	7	5	7	8	7
Poster	4	3	4	3	4	6	5
Regular visitor	3	2	4	5	5	4	3

- Amongst non-tourists, tourist information is still a common source of information, for around 1 in 10 visitors, consistent across regions.
- Newspapers are important in all regions, with the metro paper having more of an impact (as expected) in the GSMA. Conversely, the local/community paper is not as common as a source of information in the GSMA compared to the non-metro areas.
- The GSMA and South-East costal galleries are the most likely to be connecting with audiences via the Internet.
- Radio is playing less of a role amongst non-tourists in the GSMA compared to the non-metro areas.

Source of information

Breakdown by REGION – FIRST-TIME VISITORS & NON-TOURIST

All figures are %

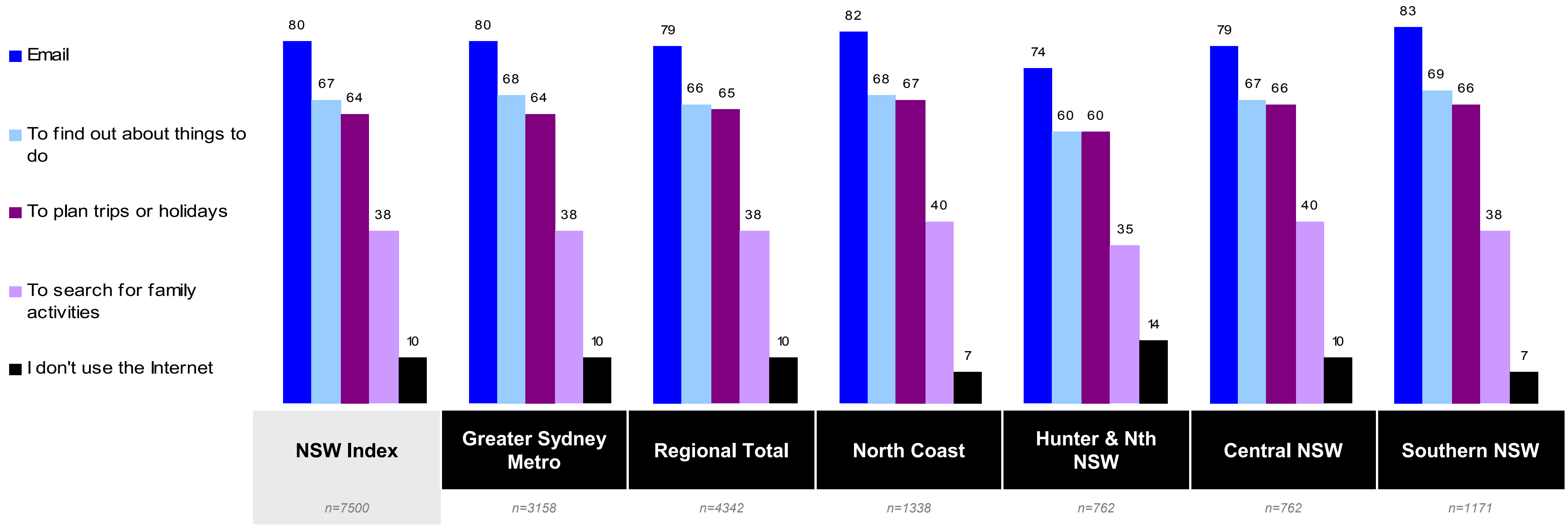
Key differences highlighted in yellow	NSW Index	Greater Sydney Metro	Regional Total	North Coast	Hunter & Nth NSW	Central NSW	Southern NSW
	n=1257	*n=685*	*n=572*	*n=130*	*n=206*	*n=81*	*n=155*
Word of mouth	36	36	37	39	44	27	31
Sign/billboard/banner	11	12	10	16	8	8	9
Newspaper (local/community)	10	8	12	14	12	7	12
I was passing by	8	9	7	5	8	9	6
Brochure/flier	8	8	7	4	7	10	8
Newspaper (major metropolitan)	8	10	4	3	5	4	4
Tourist information/publication	7	4	13	7	9	24	16
Information on internet	6	7	6	3	5	6	10
By invitation or free ticket	5	5	4	2	2	1	7
Radio	2	1	3	3	3	2	5
Poster	2	2	2	1	0	3	2
Review, article (journal/magazine)	1	2	1	0	0	0	3
I drive by (drove past)	1	0	2	4	2	0	1

- Amongst the local first-time visitors, tourist information still plays a key role, particularly in regional areas (especially Central NSW). In Central NSW tourist information is nearly as common for "non-tourists" as "word of mouth" information.
- Outdoor signage, though often not under the direct control of the individual galleries, also appears to be playing an important role in connecting with first-time audiences as are the local press

Internet use

Breakdown by REGION

All figures are %



- According to the ABS *Household Use of Information Technology, Australia, 2008-2009*, 73% of persons in NSW use the Internet (based on 15 years and older) and 68% have personal access at home.
- Gallery-goers in public galleries in NSW appear to be more likely than the average person to use the Internet, with at least 85% of gallery-goers reporting they use the Internet.
- Across regions, we see a consistently high use of the Internet to find out about things to do (around 2 in 3 visitors).

Internet Use

Museums & Galleries NSW

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	**NSW index**	**Male < 25**	**Male 25-34**	**Male 45-64**	**Male 65+**	**Female < 25**	**Female 25-34**	**Female 45-64**	**Female 65+**
	n= 7500	*n=254*	*n=566*	*n=918*	*n=498*	*n=566*	*n=1162*	*n=2179*	*n=974*
Email	**80**	89	88	81	65	89	89	83	60
To find out about things to do	**67**	81	81	68	46	78	83	70	39
To plan trips or holidays	**64**	65	73	65	47	67	79	69	42
To search for family activities	**38**	46	48	38	24	41	55	39	16
None of the above	**5**	4	4	4	8	4	2	4	9
I don't use the Internet	**10**	5	3	8	21	2	3	6	27

- Internet use does not appear to vary markedly between the genders, but it does by age.
- Around 80% of under 35 visitors are using the Internet to find out about things to do.
- Interestingly, at least 40% of those under 25 are using the Internet to search for family-activities.
- The over 65's are the least likely group to not use the Internet but at least 60% of visitors in this age group are using the Internet.

Q20. Do you use the Internet for…?

Base: All visitors, valid responses only

Visitor preferences & attitudes

Image courtesy of Lake Macquarie City Art Gallery

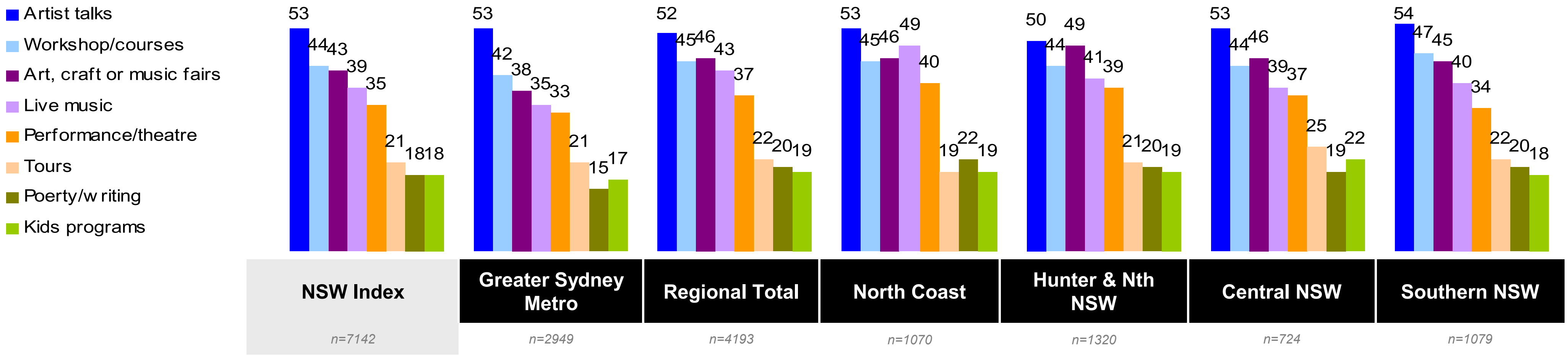
Australian Government | Australia Council for the Arts

Program/Workshop Interest

Museums & Galleries NSW

Breakdown by REGION

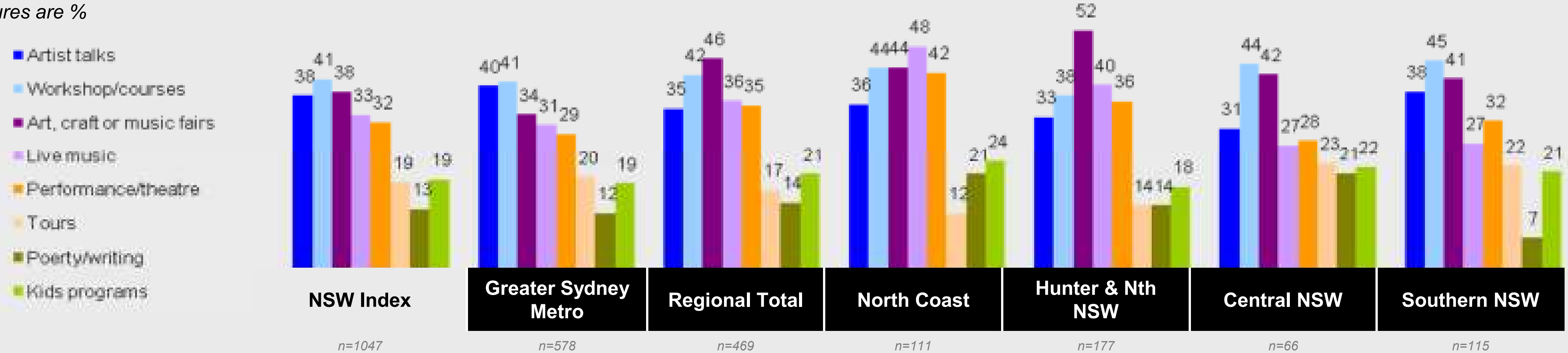
All figures are %



- Across regions, artists talks are the most frequently cited public program.
- Amongst the first-time visitors, fairs (art/craft/music) gain more traction, as shown below. These fairs tend to be opportunities where the audiences can purchase goods

Breakdown by REGION – FIRST TIME VISITORS ONLY & NON-TOURISTS

All figures are %



Q7. Programs/workshops would like to attend at the centre

Base: See filters above, valid responses only

Program/Workshop Interest

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	NSW index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n= 7142	*n=233*	*n=509*	*n=785*	*n=408*	*n=531*	*n=1108*	*n=1977*	*n=843*
Artist talks	53	42	50	56	49	44	51	54	59
Workshops/Courses	44	39	42	35	29	55	53	50	35
Art craft or music fairs	43	33	37	34	26	52	51	48	39
Live music	39	56	40	36	26	51	44	41	31
Performances/Theatre	35	40	36	31	24	47	39	37	32
Tours	21	17	21	24	22	20	18	21	26
Kids programs	18	10	23	12	7	12	41	15	10
Poetry/Writing	18	18	16	19	10	25	19	19	18

- Amongst the key demographics, younger males are most interested in live music events at the gallery (56% for males under 25).
- Performance/theatre also generates more interest amongst younger audience members (under 44's) than older audience members (over 45's).
- Currently the most cited public program overall at the NSW Index level is Artist Talks, which generate more interest amongst the over 25's for both genders (50%+) than the under 25's (42-44%).

Q7. Programs/workshops would like to attend at the centre

Base: All visitors, valid responses only

Program/Workshop Interest

Breakdown by VISITOR TYPE

All figures are %

Key differences highlighted in yellow	NSW Index	Lives within LGA	Lives within 5km	Non-tourist	NSW tourist	Interstate tourist	Internat'l tourist
	n= 7142	n=3091	n=2934	n=5623	n=644	n=378	n=438
Artist talks	53	54	55	54	47	46	42
Workshops/Courses	44	50	49	47	33	34	29
Art craft or music fairs	43	48	48	45	38	35	33
Live music	39	44	44	40	34	36	41
Performances/Theatre	35	40	40	36	33	30	31
Tours	21	22	22	21	24	20	27
Kids programs	18	22	22	20	13	12	9
Poetry/Writing	18	21	21	19	16	17	13

- Artist talks tend to remain the most cited program type across visitor type.
- For the average gallery, visitors living within 5km or within the LGA are more likely than those living further away to be interested in workshops/courses and fairs (art, craft or music), as well as performances/theatre.
- International tourists show the highest rate of interest in organised tours.

Q7. Programs/workshops would like to attend at the centre

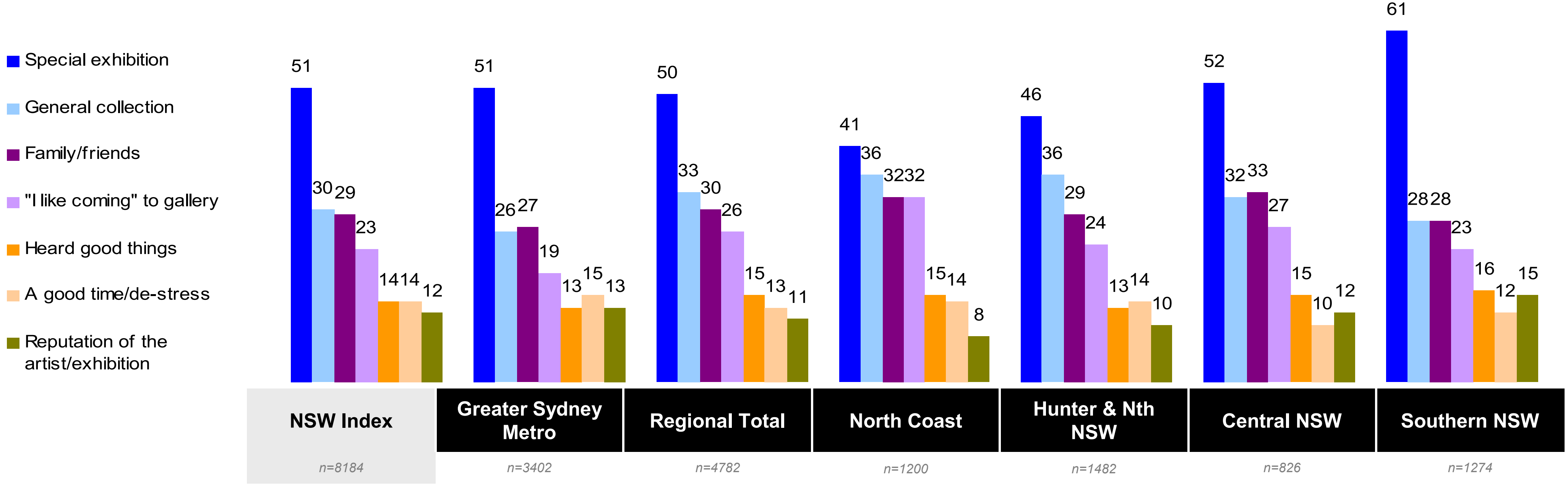
Base: All visitors, valid responses only

Motivations for coming

Museums & Galleries NSW

Breakdown by REGION – top 7 drivers shown

All figures are %



- Special exhibitions are the driving force for audiences to public galleries across NSW in the various regions. The exception is the North Coast which shows interest in the general collection near on par with special exhibitions in that region (36% vs. 41% respectively for North Coast).
- Family and friends can also be a strong motivator to come to the gallery.

Motivations for coming

Museums & Galleries NSW

Breakdown by REGION

All figures are %

Key differences highlighted in yellow	NSW Index	Greater Sydney Metro	Regional Total	North Coast	Hunter & Nth NSW	Central NSW	Southern NSW
	n=8184	*n=3402*	*n=4782*	*n=1200*	*n=1482*	*n=826*	*n=1274*
To see a special exhibition	51	51	50	41	46	52	61
To see the general collection	30	26	33	36	36	32	28
Came with family	29	27	30	32	29	33	28
I like coming to the gallery	23	19	26	32	24	27	23
Have heard good things about it	14	13	15	15	13	15	16
To have a good time/de-stress	14	15	13	14	14	10	12
Reputation of artist/exhibition	12	13	11	8	10	12	15
Holiday/touring/visiting area	10	8	11	12	8	14	12
To try something new	9	11	9	8	8	9	10
To visit the cafe	9	8	10	17	12	11	1
Study/self-education/inspiration	9	9	9	8	9	9	10
To fill in time/have a rest	7	7	7	7	8	7	8
Event/activity/performance	6	9	5	4	8	2	4
To visit the gallery shop	5	4	6	5	9	5	5
To visit the gardens	4	5	4	2	9	1	1
Part of a group/tour	3	4	3	1	3	2	4

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Motivations for coming

Museums & Galleries NSW

Breakdown by WHO VISITING WITH

All figures are %

Key differences highlighted in yellow	NSW Index	On my own	Spouse or partner	Family/friends incl. Children	Family/friends NOT incl. Children	Organised group or tour
	n=8184	n=2507	n=2086	n=1267	n=1904	n=392
To see a special exhibition	51	52	50	50	50	43
To see the general collection	30	31	35	27	28	19
Came with family	29	2	30	55	51	12
I like coming to the gallery	23	32	21	18	21	10
Have heard good things about it	14	15	15	13	13	10
To have a good time/de-stress	14	12	14	14	17	13
Reputation of artist/exhibition	12	14	11	9	12	9
Holiday/touring/visiting area	10	7	18	7	9	2
To try something new	9	10	10	10	9	6
To visit the cafe	9	4	8	14	15	5
Study/self-education/inspiration	9	14	6	6	7	15
To fill in time/have a rest	7	10	7	6	5	3
Event/activity/performance	6	7	4	8	5	20
To visit the gallery shop	5	7	5	4	4	3
To visit the gardens	4	3	3	6	6	5
Part of a group/tour	3	1	1	1	1	48

- Special exhibitions remain the dominant driver to the average gallery, regardless of who you're visiting with.
- Those coming on their own are most likely to state "I like coming to this gallery" suggesting this type of visitor enjoys regular visits to the gallery. They are also the group most likely to come to "fill in the time or have a rest, and show a skew towards self-education.
- Those coming with family or friends (with or without children) are the group most likely to be motivated by the cafe, underscoring the cafe's important role in the social and recreational visits to the gallery.

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Motivations for coming

Breakdown by AGE X GENDER

All figures are %

Key differences highlighted in yellow	NSW index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n=8184	*n=258*	*n=578*	*n=942*	*n=511*	*n=569*	*n=1179*	*n=2222*	*n=1016*
To see a special exhibition	51	40	41	50	52	45	51	55	58
To see the general collection	30	40	30	32	40	31	25	30	33
Came with family	29	36	25	27	32	36	32	30	27
I like coming to the gallery	23	19	20	24	26	21	22	25	30
Have heard good things about it	14	17	15	14	14	19	14	12	16
To have a good time/de-stress	14	18	17	13	9	24	19	13	9
Reputation of artist/exhibition	12	6	8	11	13	8	12	14	17
Holiday/touring/visiting area	10	6	12	10	14	8	10	11	9
To try something new	9	18	18	8	5	19	13	7	5
To visit the cafe	9	3	6	8	10	5	9	10	12
Study/self-education/inspiration	9	11	6	8	5	20	11	9	5
To fill in time/have a rest	7	20	15	8	5	12	7	5	3
Event/activity/performance	6	2	6	6	7	6	8	8	6
To visit the gallery shop	5	6	4	4	3	5	6	6	5
To visit the gardens	4	3	2	4	6	3	4	4	5
Part of a group/tour	3	4	3	2	3	7	3	2	4

- The under 25's are the most likely demographic to be motivated by the mental benefits of coming to the gallery (ie: de-stressing and having a good-time).
- In the same vein, males under 44 are the most likely group to "fill in time/have a rest", and overall men are more likely to cite this than women.
- Under 25's are also more likely to be coming for "study/self-education", especially for females in this age group.
- The reputation of the artist/exhibition is having a greater pull on those over 45 compared to younger age groups.

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Motivations for coming

Museums & Galleries NSW

Breakdown by VISITOR ORIGINS

All figures are %

Key differences highlighted in yellow	NSW Index	Lives within LGA	Lives within 5km	Non-tourist	NSW tourist	Interstate tourist	Internat'l tourist
	n=8184	*n=3286*	*n=3130*	*n=6212*	*n=819*	*n=503*	*n=577*
To see a special exhibition	51	56	57	55	43	35	22
To see the general collection	30	26	26	25	45	46	50
Came with family	29	30	30	29	37	26	21
I like coming to the gallery	23	31	30	27	14	13	8
Have heard good things about it	14	14	14	13	15	16	19
To have a good time/de-stress	14	14	14	14	12	12	20
Reputation of artist/exhibition	12	12	13	14	8	7	4
Holiday/touring/visiting area	10	1	1	2	35	35	45
To try something new	9	9	9	9	11	9	16
To visit the cafe	9	11	10	10	7	8	4
Study/self-education/inspiration	9	9	9	9	7	8	10
To fill in time/have a rest	7	7	7	7	6	6	10
Event/activity/performance	6	8	8	8	2	2	2
To visit the gallery shop	5	6	6	5	5	5	6
To visit the gardens	4	5	4	4	3	2	4
Part of a group/tour	3	3	3	4	1	1	0

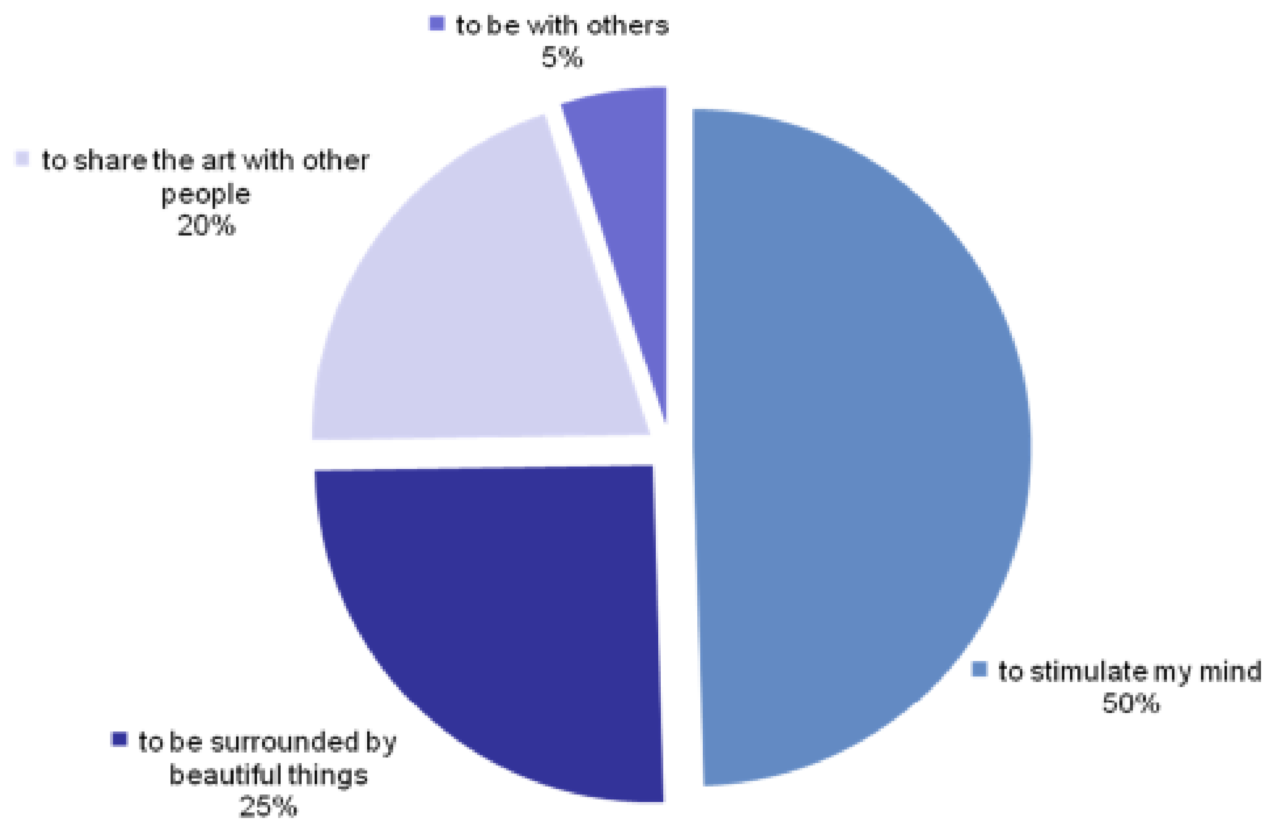
- As was shown in the Year 2 Metro Report which divided tourists from non-tourists, tourists are driven to the average gallery more by the general collection than they are by the special exhibition. This is especially true of the international tourists for whom the general collection (50%) is more than twice as likely to be a motivation for coming to the gallery vs. the special collection (22%).
- Interestingly NSW tourists are the highest of any group to be coming because of family (37%).

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Personal Reason for Visiting Gallery

- Note: this forced-choice question was only asked in Year 3 (Regional NSW) galleries, as a means of scoping the relative size of preliminary "segments" of visitors.

"I come to the gallery....



- "Stimulating my mind" was the most popular "personal reason" for coming to the gallery (at around 50% of visitors of this type in the average gallery).
- A primarily social visitor (to be with others) is in the minority (at 5%). From a social perspective, it is more common (at 20%) for visitors to be wanting to share art with other people.

Interest in exhibition type

Museums & Galleries NSW

Breakdown by REGION

All figures are %

Key differences highlighted in yellow	NSW Index	Greater Sydney Metro	Regional Total	North Coast	Hunter & Nth NSW	Central NSW	Southern NSW
	n=7460	n=3108	n=4352	n=1077	n=1339	n=768	n=1168
Painting	81	73	86	89	86	86	85
Photography	67	63	70	69	71	67	70
Exhibitions of work by local artists	64	55	70	75	71	68	67
Celebrated works of art by well-known Australian artists	64	57	70	73	71	70	65
Sculpture	63	57	68	71	68	69	66
Drawing	62	52	68	71	69	66	66
Celebrated works of art by well-known international artists	54	48	58	59	59	59	55
Ceramics/glass	51	43	57	58	55	59	57
Contemporary art	49	47	50	53	48	45	52
Textiles	44	40	47	47	44	51	48
Printmaking	41	37	44	45	41	43	46
Live theatre/dance/music performance	40	37	43	47	47	39	37
Indigenous and/or Torres Strait Islander exhibitions	40	35	43	47	42	39	42
Social history exhibitions	39	37	40	42	41	39	39
Digital media arts/interactive media	32	30	34	35	34	30	35

- Across regions, paintings are consistently the most popular exhibition type.
- Generally, visitors to regional galleries are more likely to express interest in all forms of art compared to metro visitors, who nominate fewer exhibition types.

Interest in exhibition type

Museums & Galleries NSW

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	NSW index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n=7460	*n=255*	*n=560*	*n=911*	*n=492*	*n=563*	*n=1162*	*n=2153*	*n=972*
Painting	81	65	71	84	84	72	78	84	88
Photography	67	65	69	71	64	80	73	66	57
Exhibitions of work by local artists	64	45	52	61	56	54	65	71	73
Celebrated works of art by well-known Australian artists	64	40	48	65	64	45	62	72	77
Sculpture	63	51	59	61	56	60	64	69	65
Drawing	62	52	56	64	58	58	63	65	61
Celebrated works of art by well-known international artists	54	42	45	52	51	44	54	58	61
Ceramics/glass	51	27	33	47	43	39	52	61	62
Contemporary art	49	48	52	49	31	62	56	51	36
Textiles	44	20	24	32	26	41	48	57	53
Printmaking	41	27	31	37	26	39	47	50	40
Live theatre/dance/music performance	40	44	33	34	28	52	46	44	38
Indigenous and/or Torres Strait Islander exhibitions	40	22	33	38	32	32	43	46	40
Social history exhibitions	39	20	32	40	36	31	40	44	40
Digital media arts/interactive media	32	52	40	33	16	46	41	31	17

- Older age groups (45+) are more likely to be expressing interest in the various exhibition types across the board, with some notable exceptions.
- Younger age groups (under 45's) tend to favour photography more than older age groups, and for the under 45's photography is equally popular (and for the females under 25 cases is more popular) as paintings.
- Young age groups (under 45's) are more likely to express interest in contemporary art, live performances (theatre/dance/music) and digital media arts, compared to older age groups. Under 25's have a particular skew towards live performance and digital media arts.

Q21. What types of exhibitions would you most like to see at this gallery? *Base: All visitors, valid responses only*

Interest in exhibition type

Museums & Galleries NSW

Breakdown by VISITOR TYPE

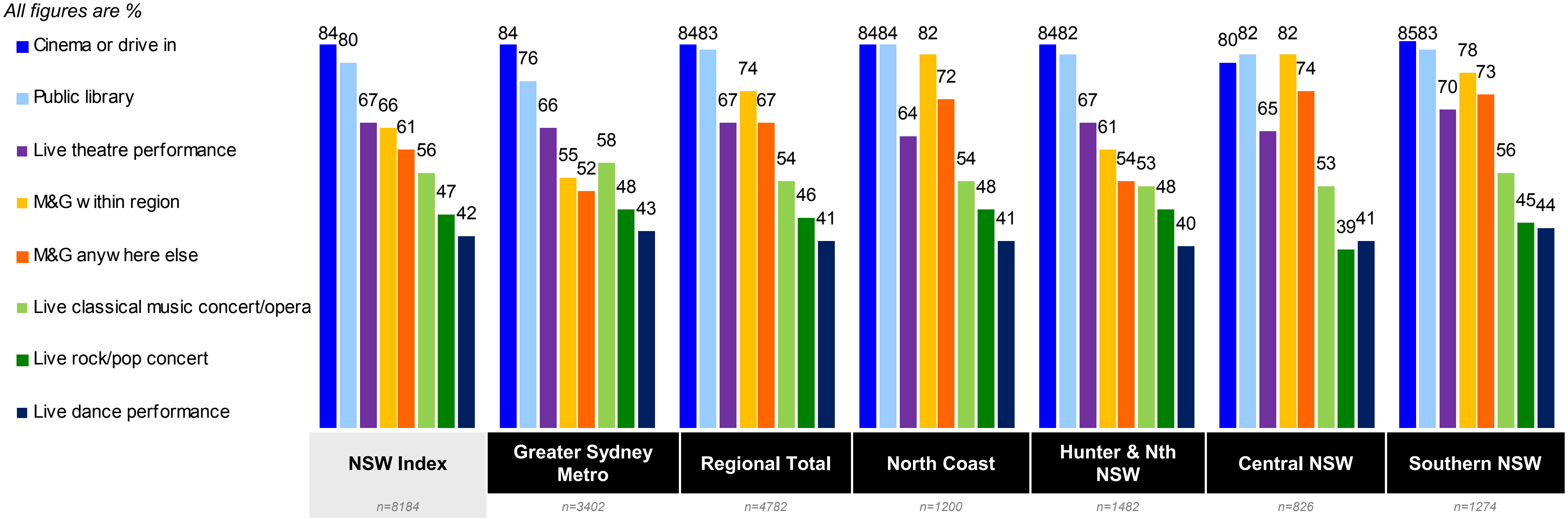
All figures are %

Key differences highlighted in yellow	NSW Index	Lives within LGA	Lives within 5km	Non-tourist	NSW tourist	Interstate tourist	Internat'l tourist
	n=7460	*n=3227*	*n=3082*	*n=5613*	*n=784*	*n=473*	*n=526*
Painting	81	84	83	81	82	83	74
Photography	67	71	71	67	65	68	68
Exhibitions of work by local artists	64	71	70	66	60	66	47
Celebrated works of art by well-known Australian artists	64	69	68	66	63	62	46
Sculpture	63	67	66	64	63	68	53
Drawing	62	67	65	63	61	60	44
Celebrated works of art by well-known international artists	54	59	58	56	51	51	38
Ceramics/glass	51	56	56	53	53	51	32
Contemporary art	49	50	50	49	48	55	40
Textiles	44	47	47	46	41	45	29
Printmaking	41	45	44	43	40	42	19
Live theatre/dance/music performance	40	48	46	42	35	37	31
Indigenous and/or Torres Strait Islander exhibitions	40	44	43	41	36	36	31
Social history exhibitions that address	39	44	44	41	34	33	32
Digital media arts/interactive media	32	35	35	33	28	33	26

- International tourists are less likely generally to express interest in different exhibitions types, but particularly with respect to local art.

Other cultural events visited in last 12 months

Breakdown by REGION



- For the average galley in each region, the cinema and public libraries are the most commonly attended "other" cultural activities undertaken by gallery-goers in the 12 month period prior to their visit.

Other cultural events visited in last 12 months

Museums & Galleries NSW

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	NSW index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n=8184	*n=258*	*n=578*	*n=942*	*n=511*	*n=569*	*n=1179*	*n=2222*	*n=1016*
Cinema or drive in	84	86	84	80	78	88	86	85	84
Public Library	80	72	72	75	81	81	77	83	87
Live theatre performance	67	52	53	65	71	60	64	70	77
Museum/Gallery within region	66	54	62	70	60	62	64	69	72
Museum/Gallery anywhere else	61	47	56	63	57	50	57	64	68
Live classic music concert/Opera	56	38	45	54	60	38	50	61	74
Live rock/pop concert	47	74	62	42	12	72	60	39	12
Live dance performance	42	41	36	33	31	49	47	43	43

- Age-related preferences exist with respect to the other cultural activities attended in the last 12 months (eg: over 65's are less likely to have attended a rock/pop concert).
- However, all age x gender combinations show a consistent pattern of attendance at other galleries within the last 12 months (around 50-70%).

Q24. Thinking about the last 12 months, how many times have you been to a…?

Base: All visitors, non-responses per item a further exclusion to the base sizes shown above

Other cultural events visited in last 12 months

Museums & Galleries NSW

Breakdown by VISITOR TYPE

All figures are %

Key differences highlighted in yellow	NSW Index	Lives within LGA	Lives within 5km	Non-tourist	NSW tourist	Interstate tourist	Internat'l tourist
	n=8184	*n=3286*	*n=3130*	*n=6212*	*n=819*	*n=503*	*n=577*
Cinema or drive in	84	84	84	85	89	81	68
Public Library	80	82	81	82	81	75	62
Live theatre performance	67	65	67	67	73	66	53
Museum/Gallery within region	66	71	72	70	68	45	36
Museum/Gallery anywhere else	61	63	64	64	64	45	36
Live classic music concert/Opera	56	53	56	56	58	56	49
Live rock/pop concert	47	46	48	47	46	47	42
Live dance performance	42	41	43	43	41	43	36

- Proximity to the gallery and tourist type does not greatly influence the other cultural activities attended in the last 12 months, except attendance at a gallery/museum within the same region (which is more frequented by non-tourists).

Correlation between gallery visits

VISITING A GALLERY IN THE REGION by NUMBER OF TIMES VISITED THE GALLERY (OF SURVEY)

All figures are %

	FIRST TIME VISITOR AT THE GALLERY	BEEN ONCE BEFORE	BEEN 2-3 TIMES BEFORE	BEEN 4-5 TIMES BEFORE	BEEN 5+ TIMES BEFORE
Have you been to another gallery within the [REGION] within the last 12 months?	44	63	67	74	83

- There is a distinct correlation between the number of times a visitor has visited their gallery in the past and the proportion who have visited another galleries in the last 12 months within the same region.
- 44% of those who are first-time visitors at the time of survey had visited at least one other gallery in the region in the last 12. This increases to 83% for those who had visited the gallery at the time of survey more than 5 times before.
- This is further support for the hypothesis raised in previous reports that frequent visitors at a particular gallery are also frequent visitors to galleries elsewhere.

Satisfaction & feedback

Image courtesy of Wagga Wagga Regional Gallery

M&G NSW

Australian Government

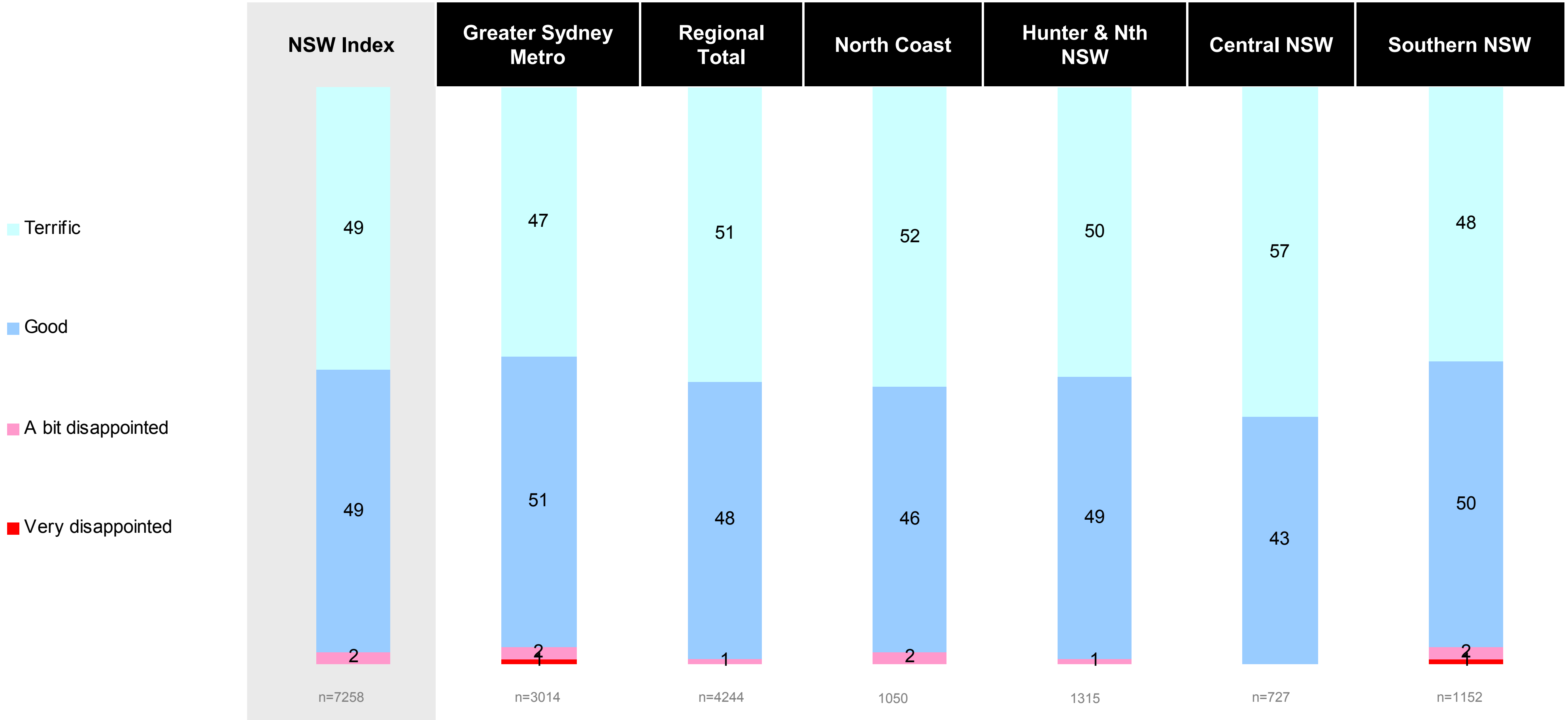
Australia Council for the Arts

Overall Satisfaction

Museums & Galleries NSW

Breakdown by REGION

All figures are %

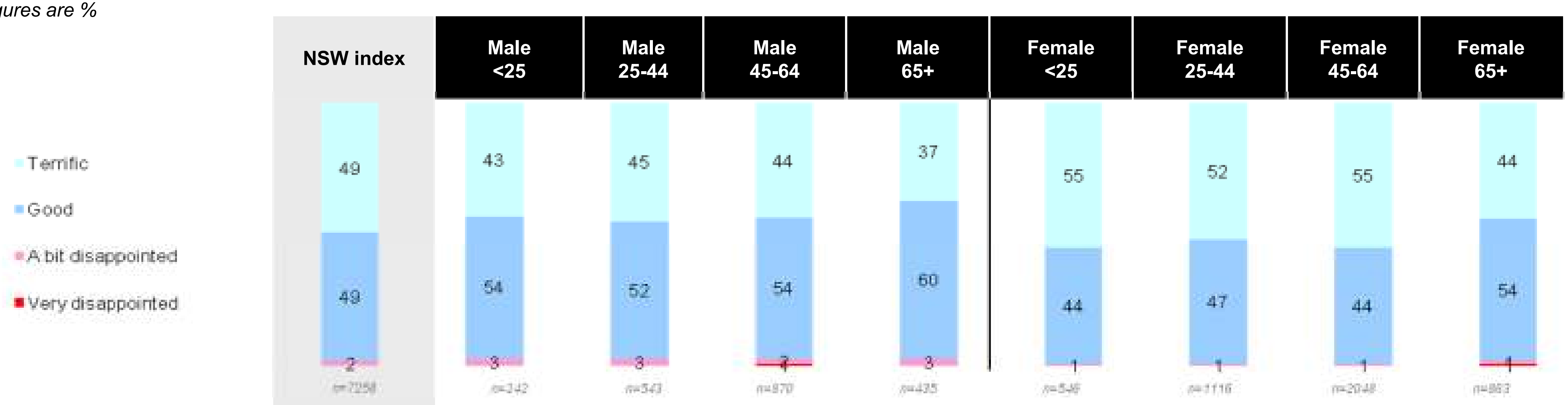


- Across regions we see a very high level of satisfaction amongst gallery-goers. Only up to 3% of visitors at the average gallery are "disappointed" with their overall visit.
- In particular Central NSW is performing well on this measure as a region, with the highest proportion of "terrific" ratings (57%) and negligible "disappointment" scores.
- (Individual galleries were provided with a full-list of open-ended feedback about specific highlights and calls for improvement).

Overall Satisfaction

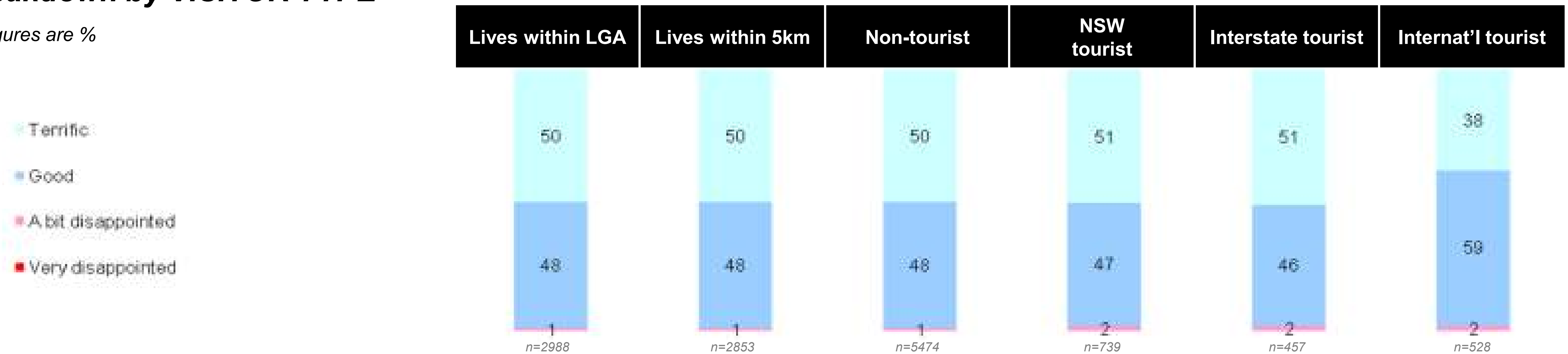
Breakdown by AGE X GENDER

All figures are %



Breakdown by VISITOR TYPE

All figures are %

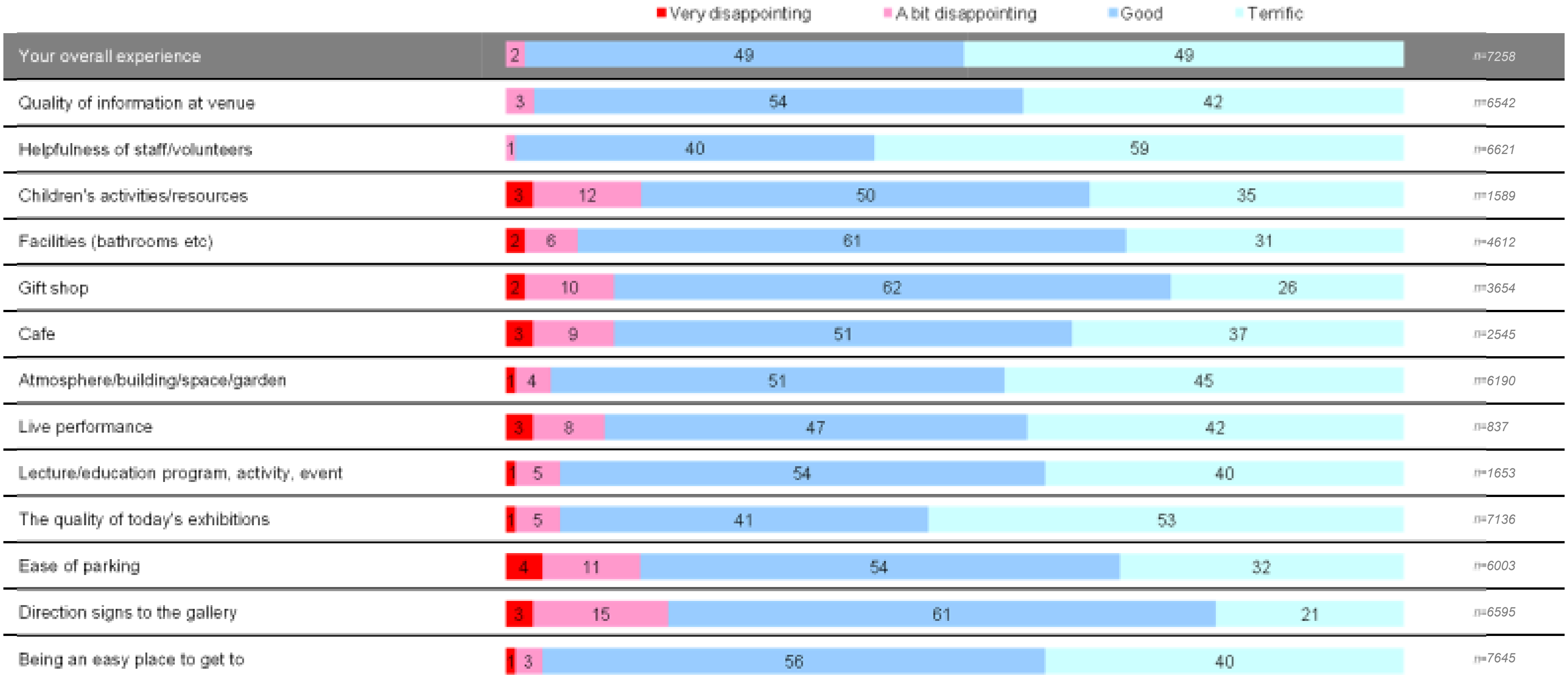


- Generally, female visitors are more likely to rate their visit as "terrific" compared to males. Both genders and all age groups overall are satisfied with their experience at their average public gallery.
- International tourists are slightly less likely to rate their experience as "terrific" (38%) and give more "good" responses (59%).

Satisfaction with specific areas

All visitors (excludes those marking "not applicable" in each case)

All figures are %



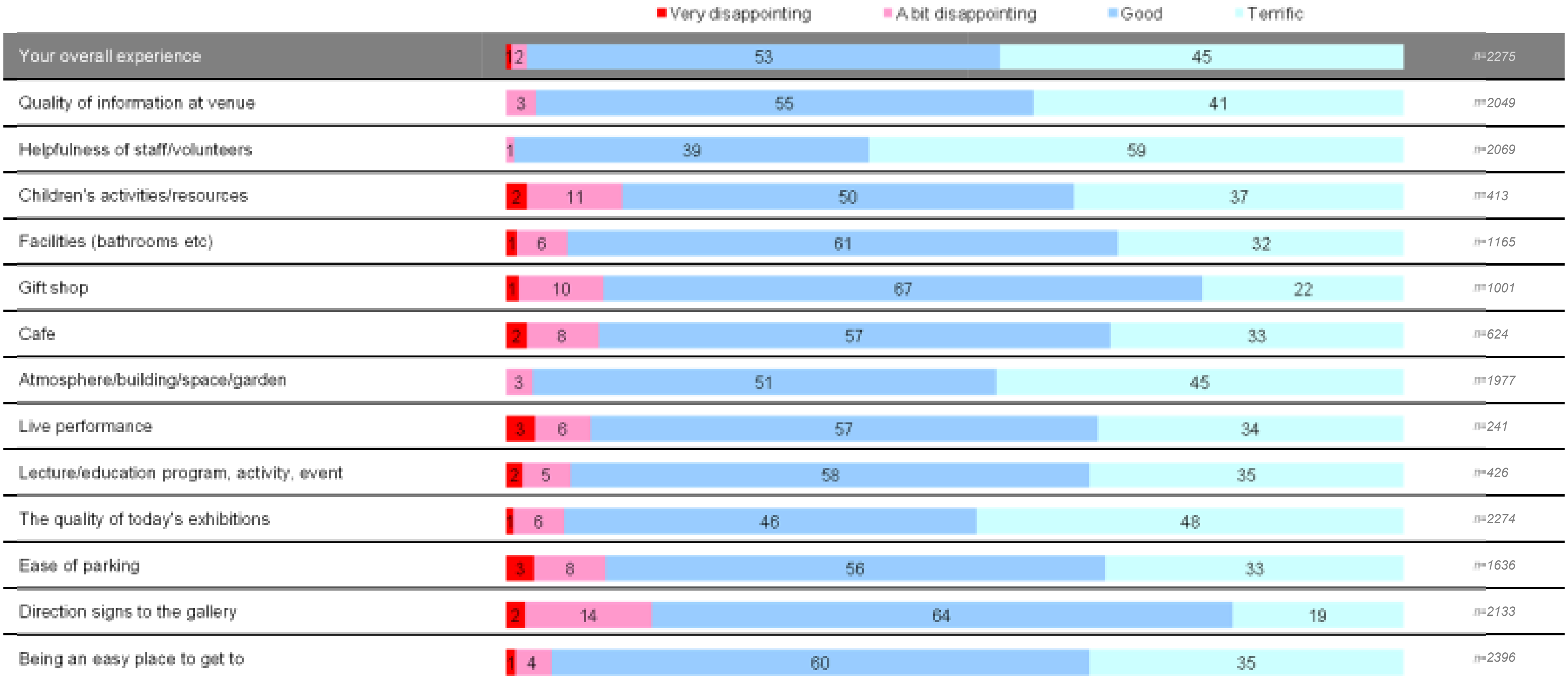
- Most areas of the visit are receiving high "good" or "terrific" scores, but some areas tend to score higher "disappointment" areas on average.
- In particular, Direction Signs to the gallery, the Ease of Parking, the Children's Activities, Gift Shop, Cafe, and Live Performance areas receive at least 1 in 10 "disappointment" ratings at a NSW average level.
- On the other hand, the helpfulness of staff/volunteers and the quality of the exhibition, are rated as especially "terrific" (at least 50%) .

Satisfaction with specific areas

Museums & Galleries NSW

First-time visitors

All figures are %



- Satisfaction levels amongst the first-time visitors do not differ markedly from the total visitor pool, albeit they tend towards "good" responses over the "terrific".

Q10. How would you rate ALL of the following in your visit today? *Base: First-timer visitors only, valid responses only*

Applicability of specific areas

All visitors – proportion of visitors who indicate the area is "applicable"

All figures are %

Note: this is a calculation based on 100% minus those who elect the area is "not applicable". It gives an indicator of how frequently visitors are engaging in the following aspect of the gallery.	Total	Metro	Regional	North Coast	Hunter & Northern NSW	Central NSW	Southern NSW
Quality of information at venue	94	93	94	94	93	95	95
Helpfulness of staff/volunteers	93	91	93	95	92	94	93
Children's activities/resources	22	20	23	22	21	29	23
Facilities (bathrooms etc)	64	63	65	66	73	66	58
Gift shop	51	44	56	61	64	62	43
Cafe	31	31	31	46	34	28	17
Atmosphere/building/space/garden	90	91	89	92	92	86	86
Live performance	9	11	8	9	7	9	8
Lecture/education program, activity, event	22	26	19	15	21	20	20
The quality of today's exhibitions	96	95	96	96	97	93	97
Ease of parking	78	63	89	91	88	92	86
Direction signs to the gallery	88	88	88	89	86	92	89
Being an easy place to get to	99	98	99	99	99	99	100

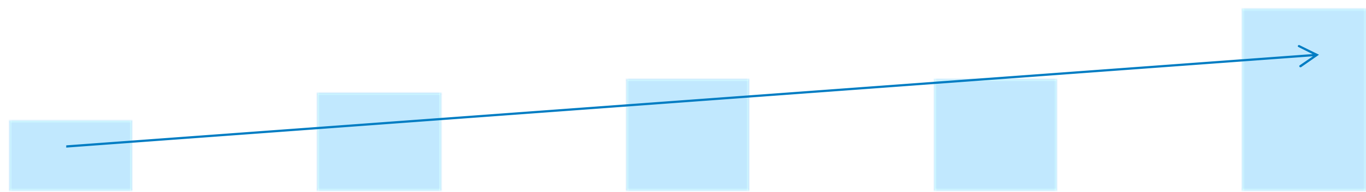
- Across regions, certain aspects of the visit pertain to a select group of visitors (based on who provided a valid rating). For instance, "live performance" represents the smallest subset of visitors, at 9% average.
- Around 1 in 5 visitors appear to be attending a lecture/education program, activity or event.
- *Note: some respondents skipped the question entirely (ie: provided a non-response), and could represent more people who did not participate in the above activities during their visit. If so, the above percentages may be slight over-estimations.*

Correlation between visitation & satisfaction

OVERALL SATISFACTION by NUMBER OF TIMES VISITED THE GALLERY (OF SURVEY)

All figures are %

	FIRST TIME VISITOR AT THE GALLERY	BEEN ONCE BEFORE	BEEN 2-3 TIMES BEFORE	BEEN 4-5 TIMES BEFORE	BEEN 5+ TIMES BEFORE
Proportion rating experience as "terrific"	45	47	48	48	53
	n=2275	*n=531*	*n=872*	*n=576*	*n=3000*



- The proportion of visitors rating their experience as "terrific" increases with the number of times visitors have been to the gallery before, and represents a statistically significant trend.
- This suggests either the more times a visitor comes to the gallery, the more they like it, and/or that visitors who really like their visit to the gallery are more likely to come back. Either way, there is a positive correlation between repeat visitation and overall satisfaction.

Q10. How would you rate ALL of the following in your visit today? [Overall experience]

Supplementary:

Comparing NSW Public Gallery Audiences to the audience of a Visual Arts Festival (17^{th} Biennale of Sydney 2010)

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The value of arts festival data from the Biennale of Sydney

- M&G NSW conducted research in conjunction with the Biennale of Sydney (BoS) to help the BoS better understand their audience. This research was conducted in 2008 (16^{th} BOS) and 2010 (17^{th} BoS).
- The study for the 17^{th} BoS was built on a similar questionnaire to the Strategic Audience Development and Evaluation Study (or "NSW public gallery study" to abbreviate), allowing data to be compared between the two cultural activities.
- M&G NSW would like to thank the Biennale of Sydney for sharing their data in this report. The inclusion of this data highlights how public gallery audiences in NSW are similar and different to an arts festival audience. The strategic implications of this comparison are discussed in the conclusion of this report.
- The questionnaire was administered at the venues of the BoS using a team of trained volunteers in the same methodology to the Strategic Audience Evaluation Study.
- Selected data charts from the 17^{th} BoS study can be found in appendix I of this report.
- Like the NSW public gallery study, the BoS study also combined multiple venues into an aggregated total. It is this total that forms the basis for comparison. As such, no individual BoS venue is identified in the data.
- Only data from the 17th BoS is referenced for the purposes of these comparisons

How audiences differ (comparing NSW Index to BoS)

- NSW public galleries have an audience that is substantially older compared to the BoS audience.
  - There is a significantly greater proportion of younger visitors at the BoS compared to NSW public galleries (44% vs. 21% for the under 35's).
  - Likewise there are fewer over 55's at the BoS compared to NSW public gallery audiences (22% vs. 47%).
- Furthermore, the BoS audience is more likely to be comprised of full-time workers and students (which reflects the difference in age profile).
  - Note: Public gallery audiences compose proportionally more retirees than the BoS's audience (26% vs. 10%).
- Although public gallery audiences have higher levels of education than the national average, the BoS audience has even higher levels of tertiary education.
  - The BoS audience shows 36% postgraduate qualifications (vs. 22% for NSW public gallery average).
  - Furthermore, BoS audience has around 3 in 4 tertiary qualifications (undergrad or above, at 74%) which is more than the public gallery average (at just over a half, or 55%).
- The BoS audience is significantly more likely to be comprised of tourists compared to the NSW public gallery average.
  - International tourists make up 17% of the BoS audience, whereas between 2%-12% of public gallery audiences are international tourists (across regional averages).
  - In total, "tourists" make nearly half of the BoS audience (45%), whereas tourists comprise around a quarter (on average, 24%) of public gallery audiences in NSW.

How audiences are similar between public galleries and BoS

- In 2010 the 17th BoS sample skewed female in a similar fashion to public gallery audiences (ie: around 2 in 3 being female).
- Despite the age differences, the distribution of annual household income of BoS visitors is not dissimilar from the public gallery audience and the Sydney Metro general population.
- Who visitors are coming with is not dissimilar between the two cultural activities. There are similar proportions of those visiting on their own and with a spouse or partner.
  - Note: the code-frames were slightly different in the BoS questionnaire with respect to friends/family and children.
- Both the BoS and the NSW public gallery audiences are overall very satisfied with their relative experiences, with typically less than 5% disappointment ratings.
- Artworks, unusual venues and the free entry come through as the top "likes" in the 2010 BoS study (in both a single and multiple choice context). Likewise, for the Strategic Audience Evaluation Study, the special exhibitions and the general collection were the two most motivating forces to attend. Furthermore, the quality of the exhibitions is a key strength (receiving relatively high "terrific" scores) in NSW public galleries (as previously shown).
- As with the NSW public gallery study, most international tourists are from English-speaking countries (again the questionnaire was only available in English). The mix of international countries represented are relatively similar.

Other interesting comparisons

- In the 17th BoS data, there is a clear relationship between the number of venues visited at 17th BoS and the likelihood to recommend the festival to others.
- Likewise, the number of venues visited also correlates with increased satisfaction levels.
- Like NSW public gallery tourists, the further festival visitors live (from Sydney) the longer they are spending in town.
- International tourists at the 17th BoS are less likely to be staying in the home of a friend or relative (30%) than NSW public gallery audiences (47%).

Conclusions & Opportunities

Image courtesy of Manning Regional Gallery

M&G NSW

Australian Government

Australia Council for the Arts

Conclusions

Overview

- Over the 2007-2010 period of the survey, M&G NSW has made several interesting discoveries about public gallery audiences, identified skews in the audience profile, as well as provided evidence to dispel certain myths about visitors, of all of which have been reaffirmed at the state aggregated level.
- Interesting discoveries about galleries audiences include:
  - The visitation of multiple galleries by gallery enthusiasts (i.e.: more visitation can lead to more visitation)
  - The effect of proximity (local communities vs. visitors travelling further vs. “tourists”)
  - The different ways in which galleries “reach” visitors of varying demographics (particularly in relation to age)
  - The dominance of word of mouth as an information source about galleries
  - That public galleries are not just for the wealthy, but represent an accessible activity for people of all socio-economic levels
- Consistent skews have been shown across regions:
  - A consistently more female audience (although nearing parity at some metro galleries)
  - An older audience (although some public galleries are more representative, particularly when there is a higher student population in surrounding areas)
  - A more educated audience (with higher proportions of undergraduate and post-graduate degrees compared to national averages)
- All of which have opened up opportunities for public galleries to grow, diversify and sustain their audience base. It is interesting to note that all galleries have a reasonable balance between new and returning audiences.
- All the individual galleries have received bespoke feedback and suggestions for audience development arising from the data. The conclusions and recommendations in this report outline only over-arching themes and contexts that public galleries should take into consideration.

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Conclusions

Identifying the key, most meaningful differences in the data

- Looking at the regional averages, there are not marked differences between the audience profile in the different regions.
- So although population demographics in these regions differ substantially, these differences do necessarily lead to marked differences between galleries with respect to audience profiling.
- The more meaningful insights have been uncovered by looking at the different visitor segments *within galleries,* by demographics (namely age), geographics (namely tourism) and behavioural (namely first-timers).
- The effect of localism and tourism have been explored and shown thorough the analysis of this report.
  - Local visitors (indexed by those living within 5km or within the LGA) are the most likely to be engaged with their respective gallery's workshops, talks and group activities, as well as visiting the gallery more frequently and repeatedly.
  - Growing the local audience and retaining the existing local loyalists should be part of any public gallery audience development strategy.
- Differences by age bracket represent the most insightful demographic segmentation, and has implications for marketing and programming.
  - Gender differences are not as marked as age differences, nor are other demographic splits.
- First-time visitors, particularly the "non-tourists", represent an important opportunity for audience growth.
  - Public galleries should be mindful of retaining first-time visitors without alienating their existing visitor base.
  - Retaining first-time visitors who are non-tourists is one of the most efficient strategies available to public galleries to strengthen their audiences.

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Opportunities

Engaging younger visitors through online social networking

- The opportunity to engage with a younger audience base is a prevalent theme amongst most public galleries in NSW.
- Although brochures, fliers and the community newspapers have been important sources of information in the past, the results of the study show these information types/strategies are most likely to be connecting with an older audience.
- On the other hand, younger audiences are more likely to use Internet as a source of information, and may present the most cost-effective and efficient means of connecting with a younger audience base.
- Over the three year period in which the survey was carried out, we have seen the increasing penetration of broadband into Australian homes, coupled with the massive rise in the use of social networking. Roy Morgan figures show that in Sept 2010 44% of Australians over 14-years old use Facebook (up from 0.3% in 2006).
- Although a website is important in providing information, it is becoming an expectation amongst gallery-visitors. Galleries have an opportunity to move from" talking to" audiences to "talking with" by truly engaging audiences seeking a closer relationship.
- Recent consumer behaviour trends show that brands and organisations are engaging with their consumers in a bi-directional manner (ie: moving on from "passive" or one-directional communication to engaging in an active conservation). Social media is a key facilitator allowing consumers to "talk back" to the gallery and to share and debate their ideas with their peers.

Opportunities

Loyal advocates and shared communication initiatives

- In the data we see correlations of behaviour that point to the existence of groups who are regular gallery-goers, who visit the gallery of survey frequently but who also visit other galleries.
- Those who have visited the gallery more than 5 times in the past are more likely to be returning to that gallery more frequently.
- Furthermore, looking at the patterns of visitation, the data has shown consistently that greater visitation to a particular gallery correlates with increased visitation to other galleries in the last 12 months.
- In other words, the more you go to galleries, the more you go to galleries. The notion that one gallery "steals" another's audience may indeed be a false assumption.
- This represents an interesting opportunity for public galleries across NSW to work collaboratively to engage the gallery enthusiasts.
- M&G NSW is eager to work with groups of galleries in developing cross-promotional activities to strengthen the wider audience base across NSW and Australia.

Opportunities

Incremental gains in audience satisfaction lead to greater engagement and advocacy

- Overall public gallery audiences appear to be fairly satisfied by their visit to the gallery (ie: mostly “good” and “terrific” ratings).
- However incremental gains in satisfaction (i.e.: shifting “good” ratings to “terrific”) offers the greatest opportunity to deepen the loyalty of the audience base.
- A “terrific” experience links to more visits to the gallery, and parallel data from the 17th Biennale of Sydney (festival) shows that “terrific” experiences also link to greater levels of advocacy.
- Consistently, “advocacy” (aka “word of mouth”) has shown to be a critical source of information about public galleries, and any strategy to grow advocacy by lifting the satisfaction level higher, should be pursued.
- The key strategic question then is how to increase the ratings from “good” to “terrific” for most galleries? The answer will be specific to each gallery but some key opportunities were identified at an aggregated level (either in the data or in the open-ended feedback) offering a good starting point for consideration:
  - Offering excellent social/communal space (i.e.; in gardens, café or similar)
  - Engagement through a workshop, talk or group activity
  - Programming that excites and stimulates an audience (including appropriate level of detail on artists and artworks)
  - Exploring the accessibility of the gallery both physically and virtually

Final words

- The main aim of the Strategic Audience Evaluation Study was to provide a research benchmark for public galleries in NSW, offering a consistent, structured approach for evaluating gallery audiences.

- M&G NSW encourages galleries to review their individual data in light of the this state report and previous aggregated reports (from 2008 and 2009) to understand how their gallery fits with the profile of galleries across NSW.

- From here, galleries are encouraged to track their audience base, and are encouraged to select questions from this survey's questionnaire in order to compare data across time.

- Along with this, galleries are encourage to adapt the questionnaire with additional questions that measure audience dynamics specific to their gallery. The questionnaire used in this survey was designed to be a "generalist" questionnaire in order to aggregate data and be useable in all NSW public galleries.

- As mentioned in previous reports, galleries should also consider conducting more in-depth qualitative work with selected audience representatives to better understand the reasons for audience profiles, how to best execute audience development opportunities, and other specific issues pertinent to their gallery and locality.

- M&G NSW looks forward to working with any public gallery in developing their research program in the future.

Appendix I:

Selected data from the

17th Biennale of Sydney (2010)

M&G NSW

Used by kind permission of the Biennale of Sydney

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This is an extract from the report prepared for the 17th Biennale of Sydney (2010) by Museums & Galleries NSW (M&G NSW) in November 2010

We would like to acknowledge the generosity of the Biennale of Sydney in sharing this data to enable an opportunity to examine the differences between audiences that attend galleries and those that attend a visual arts festival

Report Authors Matthew Mackenzie Steele and Michael Huxley

Research Team for M&G NSW

Project Manger	Michael Huxley
Senior Researcher	Matthew Mackenzie Steele
Project Manager	Kathryn Hamilton
Research Assistant	Eloise Johnstone

For **The 17th Biennale of Sydney (2010)**

Artist Director	David Elliott
Chief Executive Officer	Marah Braye
Project Manager	Tehmi Sukhla
Project Coordinator	Dara Vongsonephet
BoS Intern	Eloise Johnstone

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Background

- The Biennale of Sydney (BoS) is an international festival of contemporary art held every two years in Sydney, Australia.
- BoS is a large and well-attended contemporary visual arts festival held in Australia.
- In order to help planning, marketing and optimising the festival, the BoS conducted an audience evaluation study in 2008 to better understand its audience.
- In 2008, BoS commissioned Museums & Galleries NSW (M&G NSW) to undertake the research project.
- The valuable insight gained from the previous study has spurred the current study to continue to track audience feedback for 2010.
- M&G NSW again has been commissioned to undertake the research on behalf of the BoS.

Image courtesy of the 17th Biennale of Sydney 2010

Methodology

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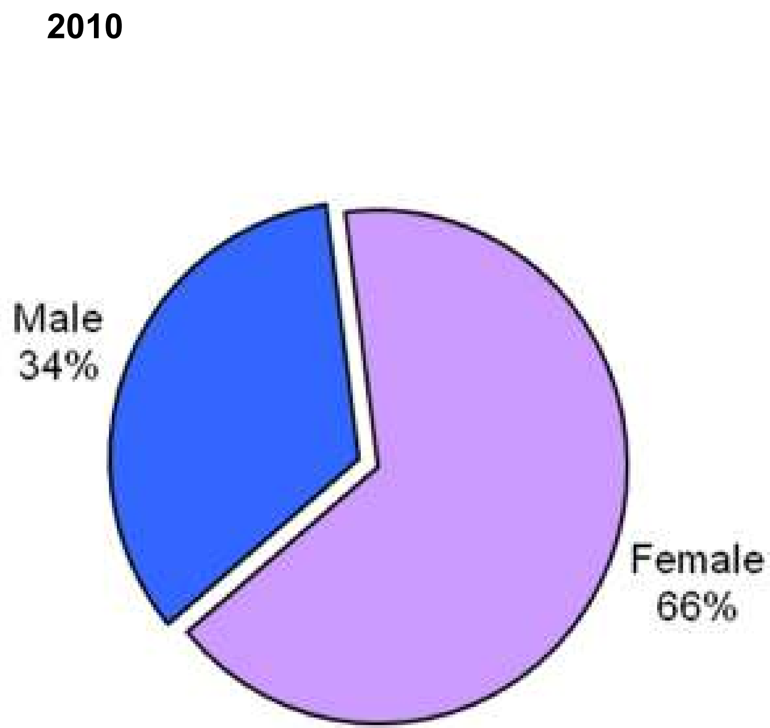
- A quantitative method was adopted for the research study in 2010.
- The survey was an "exit-survey", meaning visitors were stopped ("intercepted") as they were leaving the venue and asked to complete the questionnaire.
- Biennale volunteers were trained by M&G NSW senior researchers to administer and collect the visitor questionnaires.
- The questionnaires were a self-complete form and visitors were provided with envelopes for confidentiality. Questions are shown on the bottom of charts in this report as appropriate.
- Respondents were offered a prize-draw incentive for their participation.
- High school groups were not included in the sample, but tertiary education groups were included.
- Visitors aged 15 years and under were not included in the sample.
- Paper-based intercept surveys were conducted from 12 May 2010 to 1 August 2010.
- Random sampling was achieved by asking every 10th person to participate.
- Volunteers were asked to record the refusal rates at each venue.

Who's visiting the Biennale of Sydney?

Image courtesy of the 17th Biennale of Sydney 2010

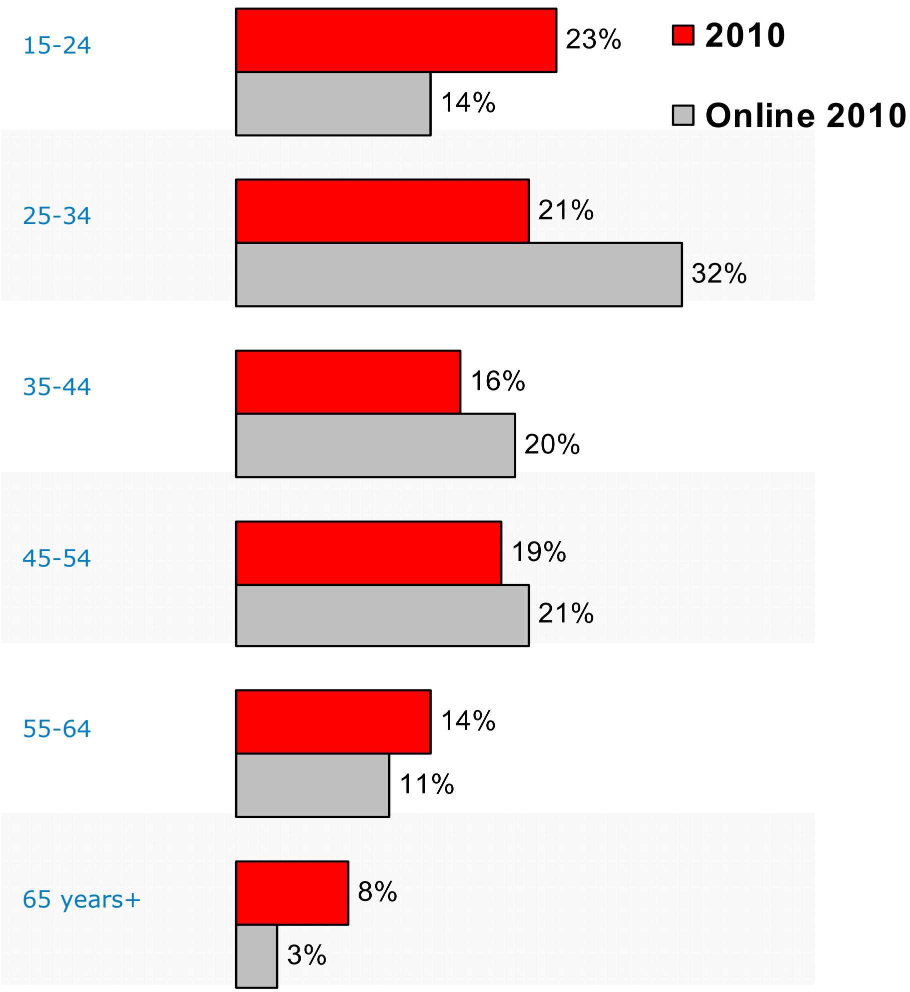
Gender & Age



(Online sample: 72% female)

Note: *High school groups were not included in the sample but tertiary education groups were included*

- Visitation among age groups was evenly distributed in 2010



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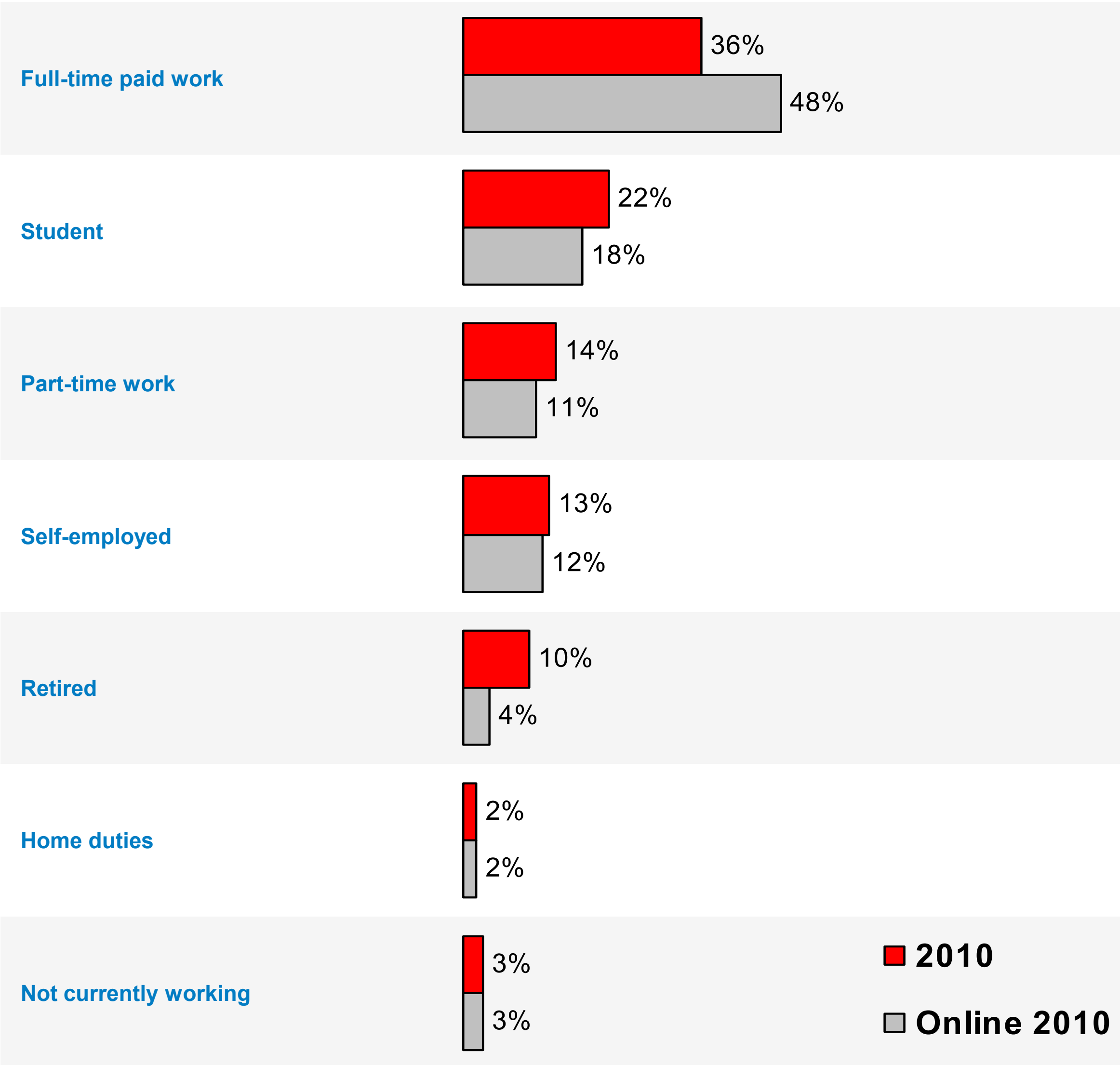
Visitors: Main occupation



- The online sample had a similar working demographic to the intercept survey but showed a higher proportion of full time workers

Further skews (not shown):

- Male visitors were more likely to be full time workers than female visitors (40% vs. 34%)
- 71% of 15–24 year olds were students
- Aprox. 2 in 5 over 55s were retired.

Q.23 What is your main occupation?

Base: All valid responses; 2010 n=1304, online n= 515

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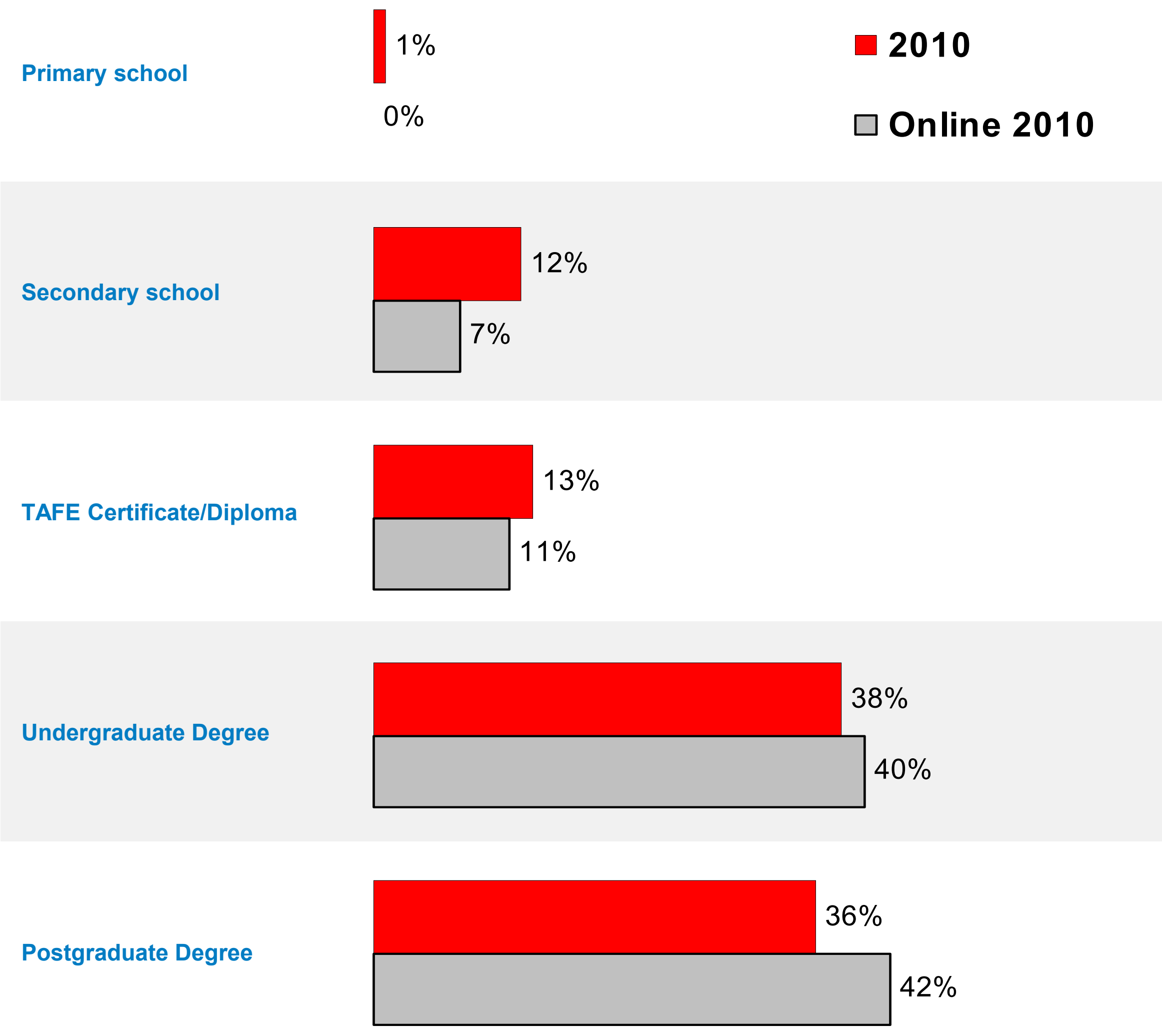
Visitors: Education



- 3 in 4 visitors hold a tertiary degree
- There were no significant differences in education level by gender
- Visitors from overseas were more likely to hold a tertiary degree (44%)

Q.25 What is your highest level of education?

Note: 6% of respondents chose not to answer this question

Base: All valid responses; 2010 n=1325, online n=513

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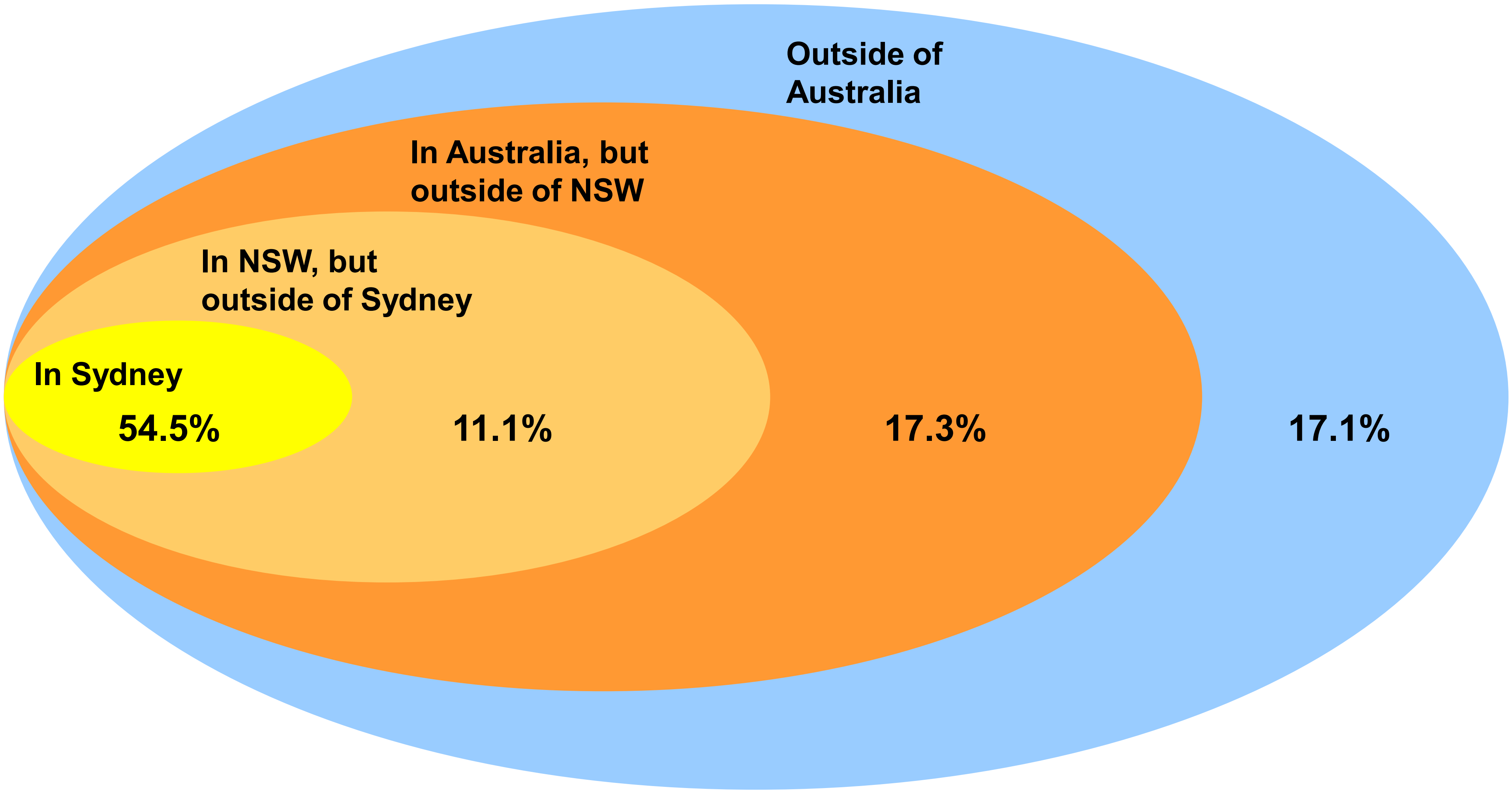
Visitor Origin

- Just over half the visitors come from Sydney, but a sizeable portion of 46% are “tourists”



Q.15 Where do you usually live?

Base: All valid responses 2010 n=1301

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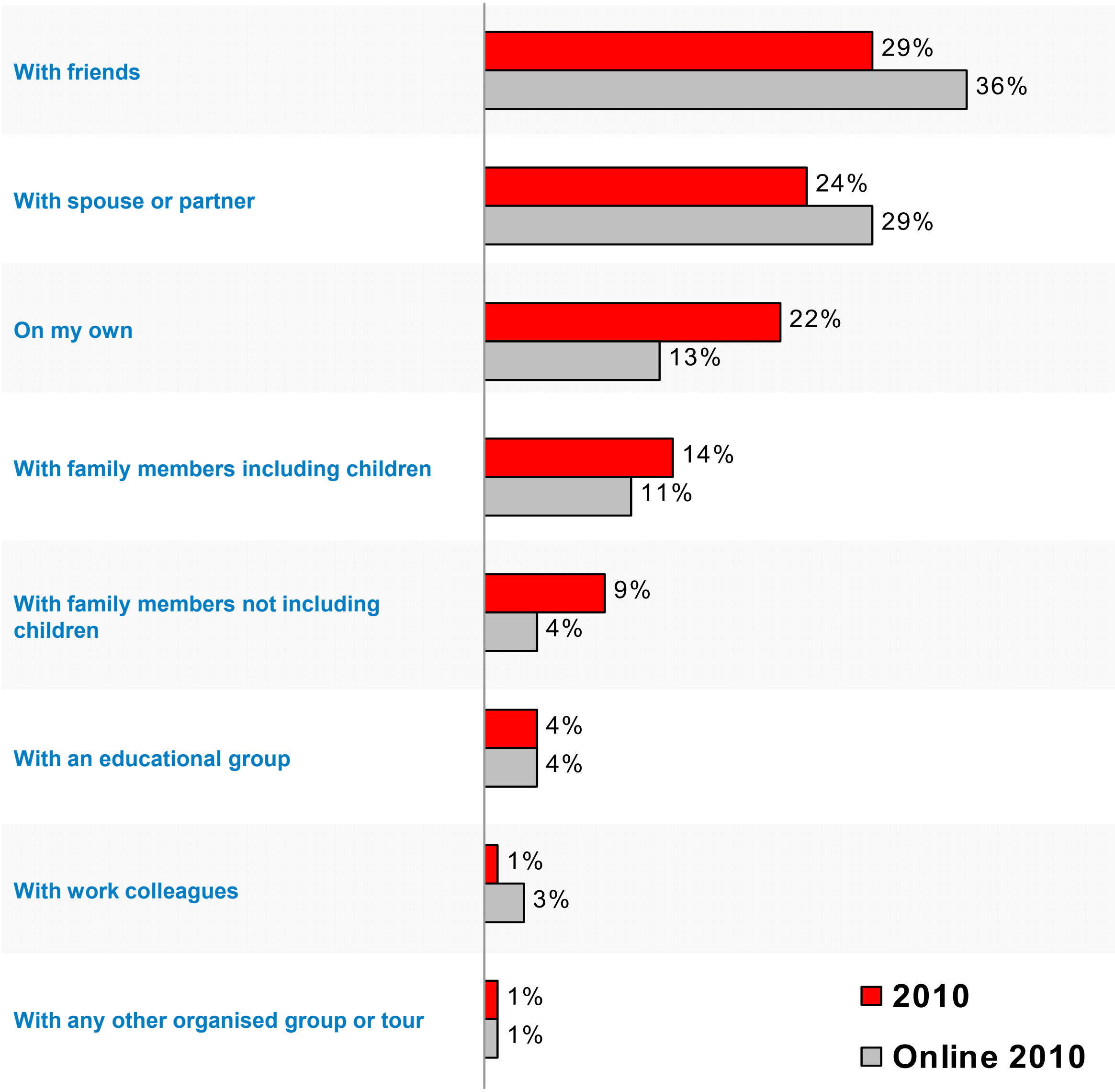
Who are they visiting with?



- Over half the BoS visitors come with friends or a spouse/partner.
- The under 25s are most likely to be coming with friends (37%) and the over 55s are most likely to be coming with a spouse/partner (39%).
- Men are more likely to be coming with a partner (32%) and women are more likely to be coming with friends (33%).
- About a quarter of visitors in the 35–44 age group are coming with children.
- Visitors who only attended one venue are more likely to visit with children (21%).
- International tourists were the most likely group to visit on their own (39%).

Q6. Who are you visiting the Biennale with today?

Base: All valid responses; 2010 n=1366, online n= 528

Satisfaction

Image courtesy of the 17th Biennale of Sydney 2010

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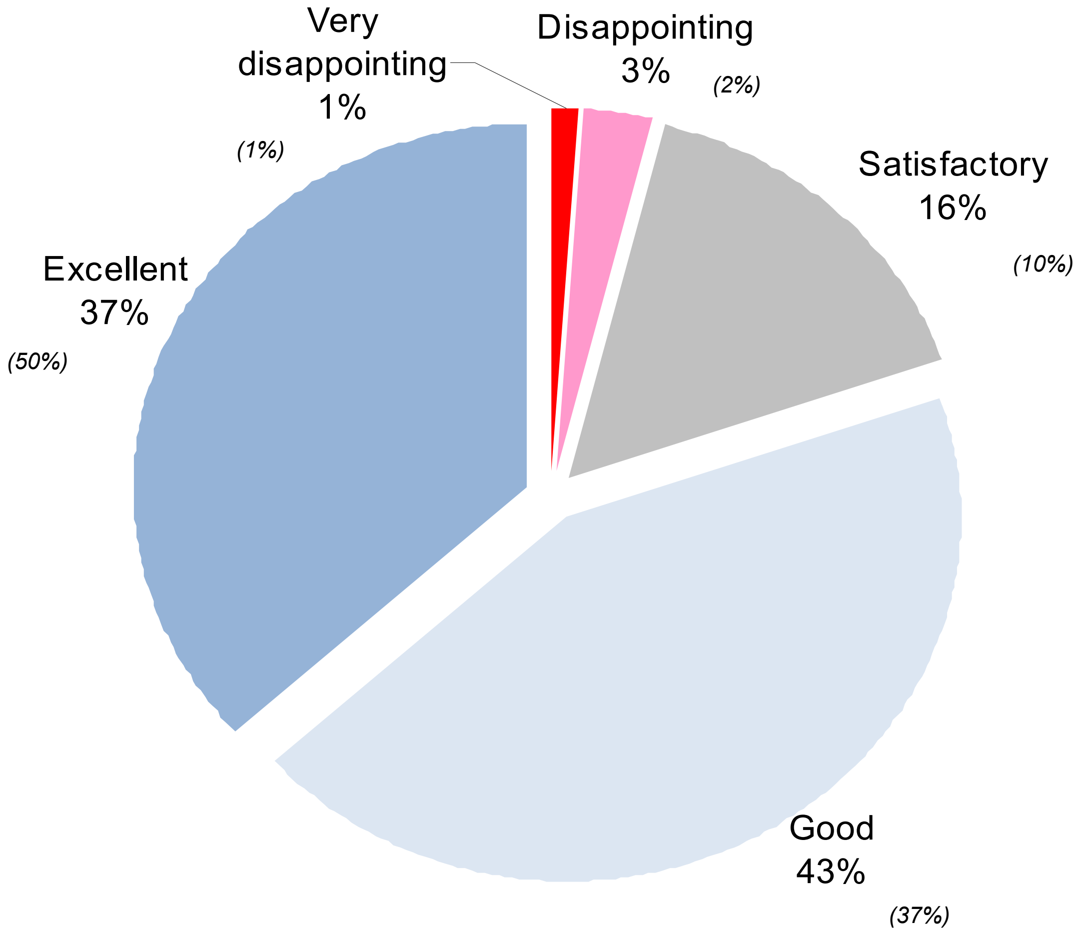
Satisfaction with BoS

2010
(online result shown in brackets)



- 80% of Biennale attendees in 2010 rate the festival as "excellent" or "good" overall
- Only around 4% express some disappointment

Q.11 How would you rate your overall satisfaction with the 2010 Biennale of Sydney?

Base: All valid responses 2010, n= 1328, online n= 527

Appendix II
The survey instrument

NOTES: The following pages contain the questions asked in the standardised survey across all three years*. The layout has been adjusted to accommodate a landscape format and all coding references have been removed.

*Question 8 was only included in Year Three of the study.

1. How many times have you visited this gallery *before today*? (Tick ONE)

Never ❒ Once ❒
2-3 times ❒ 4-5 times ❒
More than 5 times ❒

2. When was your last visit? (Tick ONE)

Never visited before ❒ Within the last month ❒
Within the last 2-6 months ❒ About 6-12 months ago ❒
More than a year ago ❒ More than 2 years ago ❒

3. Who are you visiting with today? (Tick ONE)

On my own ❒ With spouse or partner ❒
With family/friends including children ❒ With family/friends NOT including children ❒
With an organised group or tour ❒

4. How long was your visit today? (Tick ONE)

Less than 30 minutes ❒ 30 minutes – 1 hour ❒ 1-2 hours ❒
2-3 hours ❒ 3+ hours ❒

5. Have you or *any member of your family* ever been to a workshop, talk, or group activity at this gallery *before today*?

Yes ❒ No ❒ Don't know ❒

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6. How did you hear about this gallery or this exhibition? (Tick ALL boxes that apply)

Brochure or flier ❒ Poster ❒ Recommended by someone I know ❒

Tourist information/publication ❒ Newspaper (major metropolitan) ❒

Newspaper (local/community) ❒ Radio ❒

Information on Internet ❒ Sign/billboard/banner ❒

By invitation or free ticket ❒ Other (please specify) ❒________________________

7. What programs and workshops would you or your family like to attend here? (Tick ALL boxes that apply)

Artist talks ❒ Workshops/courses ❒

Kids programs ❒ Tours ❒

Live music ❒ Performances/theatre ❒

Poetry/writing ❒ Art/craft or music fairs ❒

Other (please specify) ❒_____________________________________

8. Which of the following best describes you (Tick ONE box only):

I come to the gallery to be with others ❒ I come to the gallery to stimulate my mind ❒

I come to the gallery to be surrounded by beautiful things ❒ I come to the gallery to share the art with other people ❒

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9. What were the THREE MAIN reasons you came to the gallery or exhibition today? (Tick up to THREE boxes only)

To see a special exhibition	❒	To see the general gallery collection	❒
I have heard good things about it	❒	I came <u>with</u> family members and/or friends,	❒
OR I <u>brought</u> family members and/or friends	❒	The reputation of the artist/s and/or exhibition	❒
As part of an organised group excursion/tour	❒	For a workshop, launch, talk, concert or event	❒
To try something new	❒	To have a good time out	❒
To visit the gallery shop	❒	To visit the café	❒
To visit the gardens	❒	For study purposes/self-education	❒
I like coming to this gallery	❒	Holidaying/touring in the area	❒
To attend a live performance	❒	To fill in time	❒
Other (please specify)	❒ ______________________________		

10. How would you rate ALL of the following in your visit today?

	Very Disappointing	A Bit Disappointing	Good	Terrific	Not Applicable
Being an easy place to get to					
Direction signs to the gallery/museum					
Ease of parking					
The quality of today's exhibitions					
Lecture/education program, activity, event					
Live performance					
Atmosphere/building/space/garden					
Café					
Gift shop					
Facilities (bathrooms etc)					
Children's activities/resources					
Helpfulness of staff/volunteers					
Quality of information at venue					
Your overall experience					

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11. Is there anything you particularly liked about your visit today?____

12. Is there anything that would have made your visit more enjoyable? ____

13. Are you...

Male ❐ Female ❐

14. Are you of Aboriginal or Torres Strait Islander descent?

Yes ❐ No ❐

15. Do you speak a language other than English at home?

Yes ❐ What language?_____________________ No ❐

16. Where do you usually live?

(Name of suburb/locality/town or overseas country) ____

17. What is your residential postcode?_________________

18. If you are visiting from an overseas country, tick this box ❐

19. What is the your highest level of education? (Tick ONE only)

Still at school	❐	Primary school	❐	Year 10 (or equivalent)	❐
Year 12 (or equivalent)	❐	TAFE Certificate (or equivalent)	❐	Advanced Diploma	❐
Undergraduate Degree	❐	Graduate Diploma/Certificate	❐	Postgraduate degree	❐

20. Do you use the Internet for...(Tick ALL boxes that apply)

Email	❐	To find out about things to do	❐
To plan trips or holidays	❐	To search for family activities	❐
OR None of the above	❐	I don't use the Internet	❐

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21. What sort of exhibitions would you MOST like to see at this gallery? (Tick ALL boxes that apply)

Painting ❒ Sculpture ❒ Ceramics/glass ❒

Textiles ❒ Drawing ❒ Digital media arts/interactive media ❒

Photography ❒ Printmaking ❒ Exhibitions of work by local artists ❒

Social history exhibitions that address local issues ❒ Celebrated works of art by well-known Australian artists ❒

Celebrated works of art by well-known international artists ❒ Live theatre/dance/music performance ❒

Indigenous and/or Torres Strait Islander ❒ Contemporary art ❒

Other (please specify) ❒ ______________________________

22. IF YOU ARE A VISITOR TO THIS REGION, how long are you staying in the area?

One night (overnight) ❒ 4 to 7 nights ❒

2-3 nights ❒ 8 nights or longer ❒

23. Did you stay in?

The home of a friend or relative ❒ Paid accommodation ❒

24. Thinking about the past 12 months, how many times have you been to a:

	Have not attended	Once	2 or 3 times	4or 5 times	6 to 10 times	11 times or more
Museum or gallery in regional NSW						
If so, which one/ones?						
Museum or gallery anywhere else						
Public Library (excluding school, college or university)						
Live classical music concert/opera						
Live theatre performance						
Live dance performance						
Live rock/pop concert						
Cinema or drive in						

25. What is your MAIN occupation? (Tick ONE only)

Full-time paid work ❐ as ______________________________

Home duties ❐

Part-time paid work ❐ as ______________________________

Retired ❐

Self-employed ❐ as ______________________________

Student ❐

Unemployed ❐

Other ❐8(please state) ______________________________