

Guess Who's Going to the Gallery?

A Strategic Audience Evaluation and Development Study for Galleries in NSW

Sydney Metro Report



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M&G NSW

This project is supported by



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Table of Contents

	<i>page</i>		<i>page</i>
INTRODUCTION		STUDY FINDINGS	
Acknowledgements	3	Visitor Demographics	27
Funding Partners	4	Visitor Behaviour	43
Project Team	5	Information, Interests & Motivations	65
Participating Galleries	6	Satisfaction and Feedback	83
Steering Committee	7	TOURIST REPORT	87
Background, Study Aims, Methodology	8	Notes about tourists	88
Note on Reading Charts	13	CONCLUSIONS & RECOMMENDATIONS	117
EXECUTIVE SUMMARY	15	APPENDIX	127

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Funding

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Market Development, National



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Research Partners

JONES DONALD
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University of Wollongong



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- Tony Jones, Managing Partner, Jones Donald Strategy Partners

Participating Galleries

- 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

Steering Committee

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Background

- In 2005 Museums & Galleries NSW (M&G NSW) commissioned a scoping study of 32 regional 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 consistent 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 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 visitors
- In 2008 - 2009 M&G NSW commenced the second year of the *Strategic Audience Evaluation and Development Study* in the Sydney Metropolitan region of NSW. This report details the findings from the research undertaken in 10 galleries in the Sydney Metropolitan region based on 2239 responses collected from visitors in the participating organisations
- M&G NSW will continue the *Strategic Audience Development Study* in 2009 - 2010, for a comprehensive overview of visitors across remaining regions of NSW, with continued key funding from the Australia Council for the Arts

Study Aims

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

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
- Advocate for regional and state-wide programs of audience development

The data presented is intended to act as a benchmark, and as a guide future for research opportunities

Methodology

The questionnaire:

- A standardised self-complete paper survey was designed for use in all the participating galleries
- Training was provided to staff and volunteers at each participating gallery
- Staff and volunteers distributed the self-complete paper survey to visitors, during the allocated 2 survey periods. Each survey period ranged from 2 weeks to 2 months, depending upon rates of visitor attendance and staff resources
- Fieldwork began in August 2008 and concluded in February 2009 with 2239 responses collected overall

The sample:

- Visitors 15 years or older
- 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 or friends
- A maximum of 2 people were surveyed in any one tour group
- The standardised questionnaire was only available in English. This may have reduced the participation of visitors who spoke English as a second language or visitors with literacy barriers

Report Structure

This report separates visitors by those who are Sydney Metro residents and non-Sydney Metro residents

Sydney Metro Resident Report

This is the major section of the report and excludes tourists to focus solely on the population of Sydney Metro residents

Tourist Report

This section looks at the differences between Sydney Metro residents and tourists of different types: NSW, interstate and international

- In this survey, the galleries in Sydney Metro revealed varying levels of tourist visitation
- Several galleries in the Sydney Metro region have a high proportion of “Tourists” (defined here as people who live outside of the Greater Sydney Metropolitan area)
- Grouping gallery audiences is problematic in Sydney Metro because the behaviour, attitudes and needs of tourist audiences vary significantly from Sydney residential audiences

Weighting Sydney Metro galleries

For the Sydney Metro Report, the Sydney resident audience data is standardised by weighting

- **Galleries differ dramatically in Metro Sydney** with respect to the size of the galleries and the number of visitors per year
- As the purpose of this study is to comment on audience characteristics rather than audience volume, the data has been weighted so that each gallery contributes an equal voice to Sydney Metro-wide report. The purpose giving each of the galleries an equal voice is to provide a yardstick for Sydney Metro wide comparisons
- These aggregated results, at the Sydney Metro level, are termed an “Index”. The Index gives individual galleries a benchmark for the Sydney Metro Region audiences, by which they can determine how their audiences may differ
- This Index reflects a random selection of non-tourist visitors, at a particular point in time, from these Sydney Metro galleries. This Index is NOT reflective of the gross (including tourists) population of gallery attendees

The Tourist Supplementary Section of this report is weighted differently

- *Please refer to the Tourist Supplementary Section*

Note on reading charts

- **All figures** shown are percentages unless otherwise specified
- Some data (where appropriate) is compared to Australian Bureau of Statistics (ABS) 2006 census data
- Individual bases for the data are show with a description of any applied data filters
- Key breakdowns for each question (eg: by demographics (such as gender, age, income) or behavioural groupings (such as first-time visitors vs. multi-return visitors) **are only shown if significant differences** between groups exists

Key definitions

- **The “Sydney Metro Index”**
 - The standardised average score for all the participating galleries in the Greater Sydney Metro region
 - Can be referred to simply as “the Sydney average” or the “average of Sydney galleries”

- **“Tourists”**
 - Defined here as people who normally reside outside the Greater Sydney Metro region

- **“Sydney residents”**
 - Refers to visitors to the gallery who live within the Greater Sydney Metro region

- **“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 we filter the data to analyse specific sub-groups, or if certain respondents do not provide a valid answer to a question

M&G NSW

Executive Summary



IMAGE © Ella Condon Installation view of *Heresies* at the ACP 2008

Executive Summary - Sydney Residents

- **Galleries in Sydney Metro have very different audience profiles**
 - As highlighted in the methodology, Sydney Metro galleries have dramatically different proportions of “tourists” (non-Sydney residents)
 - Within the segment of Sydney residents, the characteristics of visitor populations differ greatly from gallery to gallery
 - The Sydney Metro Index provides an averaged, standardised benchmark by which galleries can understand how they might be different from other galleries in the Sydney Metro region
- **The distance Sydney residents live from the galleries varies extensively**
 - Some galleries have 70% of visitors living within 5km of the gallery, whereas others have 31% living within 5km of the gallery

Executive Summary - Sydney Residents

- **On average, most gallery visitors are female**
 - As a rule of thumb, around 2 in 3 visitors are female. This is fairly consistent across age levels
 - Male audiences at individual galleries range from 19%, up to a nearly even gender split (49%)
 - Visitors who reside in the Northern suburbs are more likely to be female (75%), whereas visitors from the Eastern suburbs tend to display a more equal gender balance (59% female)
- **On average, Sydney resident visitors are *slightly* older than what would be expected from the general population of Sydney residents**
 - Compared to ABS data for the Sydney Statistical Division, there is a slightly greater proportion of over 55 year old residents visiting galleries than what would be expected from the general population
 - The proportion of the youngest (15-24) and oldest (65+) age brackets differ from gallery to gallery (for example, the 65+ age bracket varies from 36% to 3%)
 - On average, about 1 in 5 visitors are retirees but this proportion varies significantly between galleries (from 4% to 40%)
- **About half of Sydney resident visitors identify as “working” and around 1 in 3 are full-time workers**
 - The number of full-time workers varies from 65% (around 2 in 3) to 16% (around 1 in 7) between individual galleries

Executive Summary - Sydney Residents

- **Income is roughly in line with ABS statistics for Sydney Statistical Division for the average of Sydney Metro**
- **On average, around 1 in 2 have typically visited the surveyed gallery more than 5 times before**
 - Some galleries have a high proportion of repeat visitors (up to 70% more than 5 times before) to a low repeat visitor base (15% visiting more than 5 times)
 - Sydney residents who live closer to the galleries are also more likely to have visited more than 5 times before
- **A strong correlation exists between the number of times visitors have visited other galleries in Metro Sydney, and the average number of times they have visited individual galleries**
 - Those who have not visited other galleries in Metro Sydney, were least likely to have visited a particular gallery more than 6 times (21%)
 - On the other hand, those who had visited other galleries in Sydney Metro more than 5 times were also the most likely to have visited a particular gallery more than 5 times
 - This trend is consistent within most galleries surveyed across the Sydney Metro region

Executive Summary - Sydney Residents

- **On average, 2 in 3 visitors had returned to the gallery of their survey within the last 6 months**
 - The proportion of Sydney residents returning within the last 6 months varied from 52% to 83%
 - Younger Sydney resident visitors are more likely to have visited within the last 6 months
 - Sydney resident visitors who live closer to the gallery (within 5 km) are also more likely to have revisited within the last 6 months
- **How recently the repeat visitors had attended a particular gallery also relates to the number of times they had visited other galleries in Sydney Metro**
 - Of those who had visited *other* galleries in Sydney Metro more than 5 times in the last 12 months, 79% (around 4 in 5) of visitors return to the gallery of survey within the last 6 months
 - Whereas return visitors who had not attended another gallery in Sydney Metro in the last 12 months, were least likely to have returned to the gallery of survey in the last 6 months (45%)

Executive Summary - Sydney Residents

- **About 1 in 3 Sydney residents visit the gallery on their own**
 - The proportion visiting on their own varies between galleries from 17% to 51%
 - Certain groups are more likely to visit on their own: Male visitors, visitors in the 25-34 age category, those who live closer to the gallery, and those who had already attended the gallery more than 5 times before
- **About 1 in 4 Sydney residents spend less than 30 minutes in the gallery, whereas about 1 in 3 spend over one hour**
 - Older visitors (over 55's) are more likely to spend longer in the gallery, as are those in the 15-24 age category
 - Those in the 25-44 age group make the shortest visits to the gallery (with around 33% spending less than 30 minutes in the gallery)
 - Other groups who also have shorter visitation to the gallery include men, those who live closer (within 5km of the gallery), and those who live in the Eastern suburbs

Executive Summary - Sydney Residents

- **About 2 in 5 Sydney resident visitors (or a member of their family) have ever attended a workshop, talk or group activity at a gallery**
 - Attendance at a workshop, talk, or group activity raises the proportion of those visiting more than 5 times to 76% (or around 3 in 4)
 - Similarly, workshop, talk or group activity attendance raises the proportion of return visitors who had returned within the last 6 months to 81% (or around 4 in 5)
- **Word of mouth is the single most common source of information about galleries, being cited by around 1 in 3 Sydney resident visitors on average**
 - Across galleries, word of mouth was consistently the highest or second highest source of information about the gallery
 - Young people (15-24) were the most likely overall to cite word of mouth
- **Galleries differ with respect to the impact of local vs. metro newspapers.**
 - Metro newspapers were cited to varying degrees (from 3% to 45% of Sydney resident visitors) as were local papers (from 0% to 21% of all Sydney resident visitors).
 - Galleries whose visitors cited local papers highly were less likely to cite metro papers, and vice versa

Executive Summary - Sydney Residents

- **Most visitors are online (93%) and about 3 in 4 overall are using the internet to “find out about things to do”**
 - However, the internet is not rated highly as a source of information about the gallery with only 1 in 10 on average citing it as a source of information on the gallery of survey
- **With respect to Sydney resident preferences and motivations, across Sydney Metro galleries on average:**
 - Artist talks are the most popular program with just over a half (56%) of visitors indicating their interest in this type of workshop, talk or group activity
 - Special exhibitions are the most commonly cited motivation to visit the gallery with around 3 in 5 indicating it as a main reason for coming to the gallery
 - Painting and photography are the most popular types of exhibitions overall
- **Nearly all visitors are satisfied with their overall experience in the gallery**
 - 97% of visitors indicating their experience was “good” or “terrific” (with an even split of “good” and “terrific” responses)
 - The “Ease of Parking” was the specific area of dissatisfaction that came through most strongly for Sydney resident visitors
 - Of the 60% of respondents for whom parking was an applicable issue, nearly 1 in 4 express dissatisfaction with the “ease of parking” (ie: giving a “disappointing” or “very disappointing” rating)

Executive Summary - Tourists

- **Galleries vary widely with respect to their tourist visitor base (defined as those who reside outside the Greater Sydney Metro region)**
 - The total proportions of visitors who are tourists can range from 11% (about 1 in 10 visitors) to 60% (about 3 in 5 visitors)
 - International visitor proportions can range from 1% of visitors (just 1 in 100) to 38% (about 1 in 3 visitors)
- **On average most tourists are from the United Kingdom (around 1 in 3) or other European countries**
 - However, as the survey was only available in English, non-English speaking tourists may actually be higher than what is reported by this study
- **NSW and interstate tourists are less likely than Sydney residents to be speaking a language other than English at home**
 - Of tourists, international tourists are much more likely to be speaking a language other than English at home
- **Interstate and international tourists show a similar age profile to Sydney resident visitors**
 - However NSW tourists are skewed older with over 1 in 2 NSW visitors over the age of 50

Executive Summary - Tourists

- **The gender split is constant between Sydney Metro residents and tourists (2 in 3 female)**
 - However international tourists show a slightly more even gender split (at 40% male)
- **The further tourist visitors live from Sydney, the more likely they are to be first time visitors**
 - 20% of Sydney Metro residents are first time visitors (about 1 in 5). For NSW tourists, this proportion rises to 26% (about 1 in 4). For interstate visitors, this rises to over a half (57% first time visitors) and for international visitors this rises to 80% (or 4 in 5)
- **The further tourist visitors live from Sydney, the more likely they are to be spending longer in Sydney**
 - Nearly a half (47%) of international visitors are staying over a week in Sydney
 - Only 4% of NSW tourists and 15% of interstate visitors are staying more than a week
- **Compared to interstate and international tourists, NSW tourists:**
 - Have lower gross annual household incomes
 - Are less likely to have a tertiary qualification, and
 - Are less likely to be staying overnight in Sydney

Executive Summary - Tourists

- **Who they visit with and the length of time visitors spend in the galleries is fairly similar for tourists and Sydney residents alike**
 - However Interstate visitors are slightly more likely to make quicker visits on average compared to International visitors
- **Unlike Sydney residents, interstate and international tourists are much likely to be motivated by the general gallery collection over the special exhibitions**
 - Over half of Sydney residents (59%) are citing special exhibitions as one of their primary motivations to attend the gallery. Interstate and international visitors are much less likely to be citing special exhibitions as a reason for attending (at 25% and 35% respectively)
 - On the other hand, over half of interstate and international visitors are citing the general collection as a reason for attending the gallery (62% and 52% respectively), whereas only 29% of Sydney residents are citing the general gallery as a reason to attend
 - NSW tourists are very similar to Sydney residents with respect to how motivated they are by general collections vs. special exhibitions
- **Participation in a workshop, talk or group activity is around 1 in 10 for international and interstate visitors or their families**
 - This compares to around 2 in 5 (40%) of Sydney residents and around 1 in 5 (22%) of NSW tourists

Executive Summary - Tourists

- **Overall satisfaction with the galleries is very high across tourist groups**
 - Nearly all tourists indicate their visit was “good” or “terrific” (similar to the Sydney resident visitors)
 - Interstate tourists, for whom parking was relevant, are more likely to report dissatisfaction with the “ease of parking” than international visitors

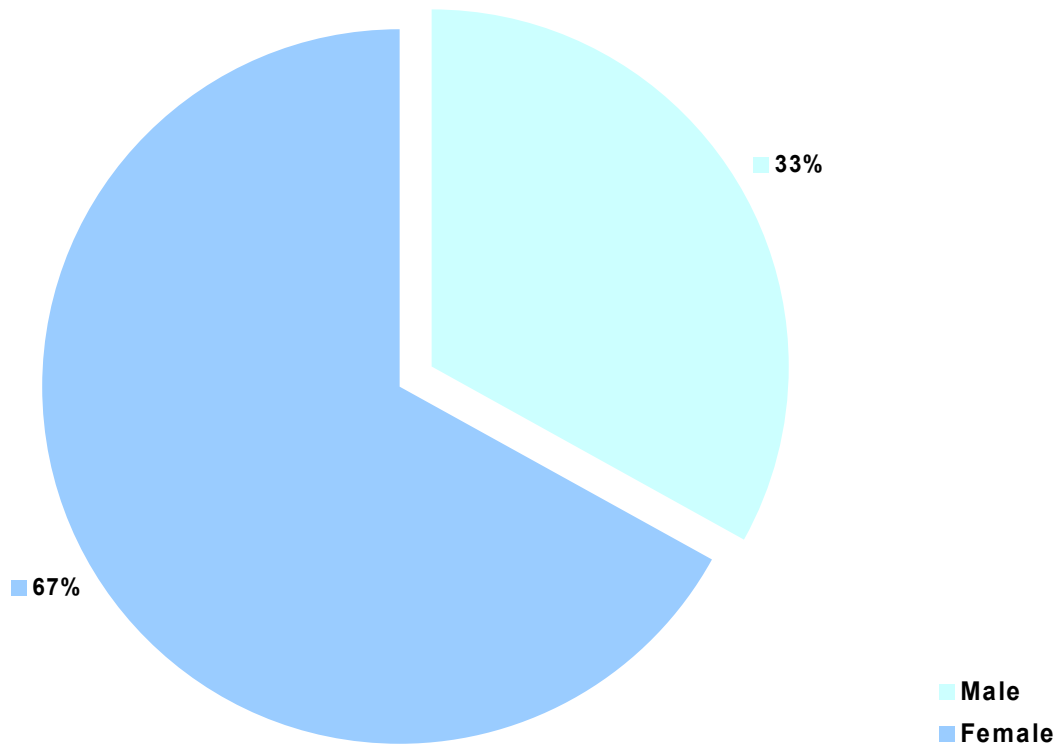
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Visitor Demographics



Abundant opening at Object Gallery, 2009. Photo: Joy Lai

Gender

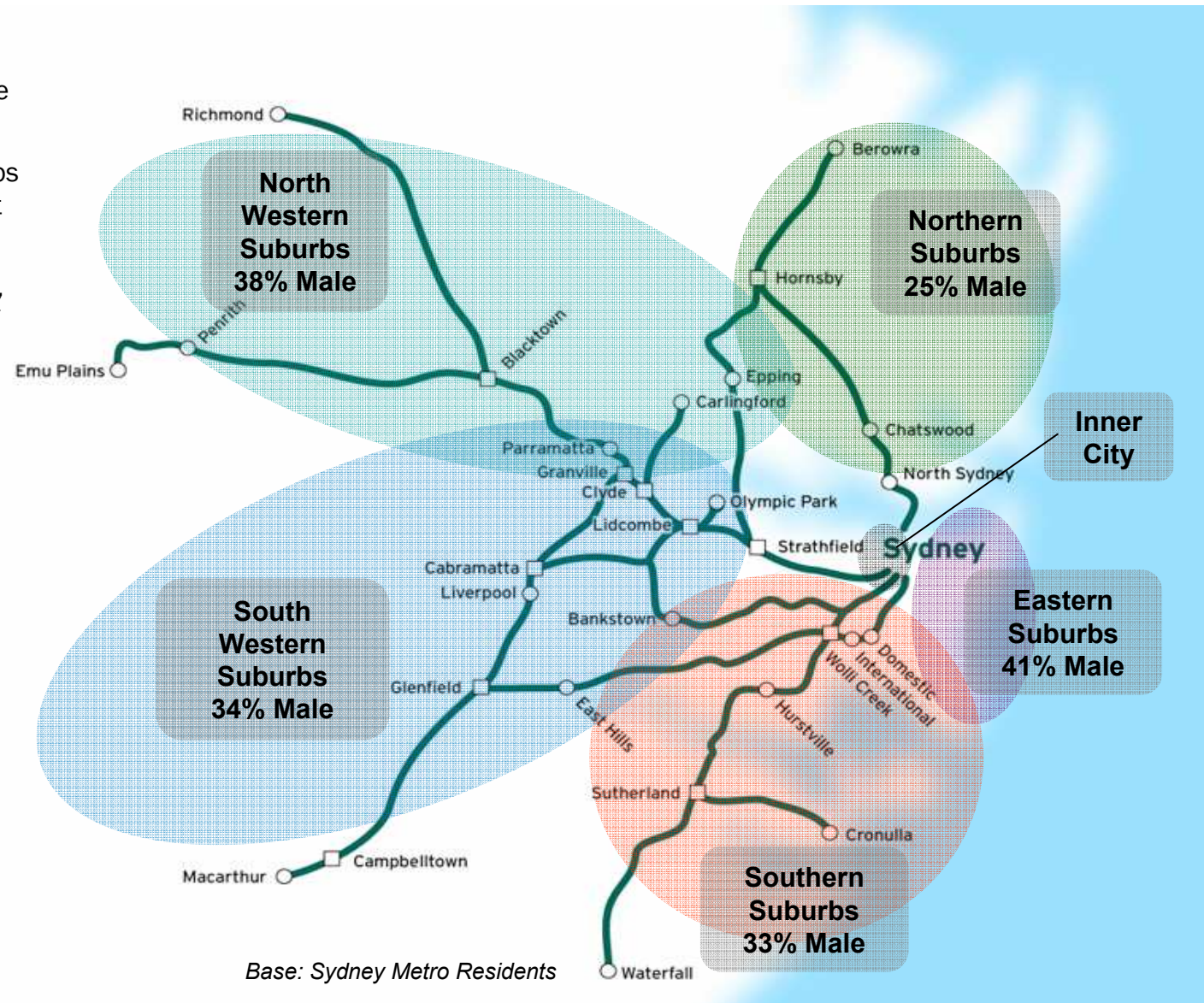


- Women make up about two-thirds of Sydney resident audiences
- Galleries differ in their gender balance, with some galleries having a very even gender balance (49% male) and others having a low male visitation (19%)

Gender

Breakdown by Residential Postcode

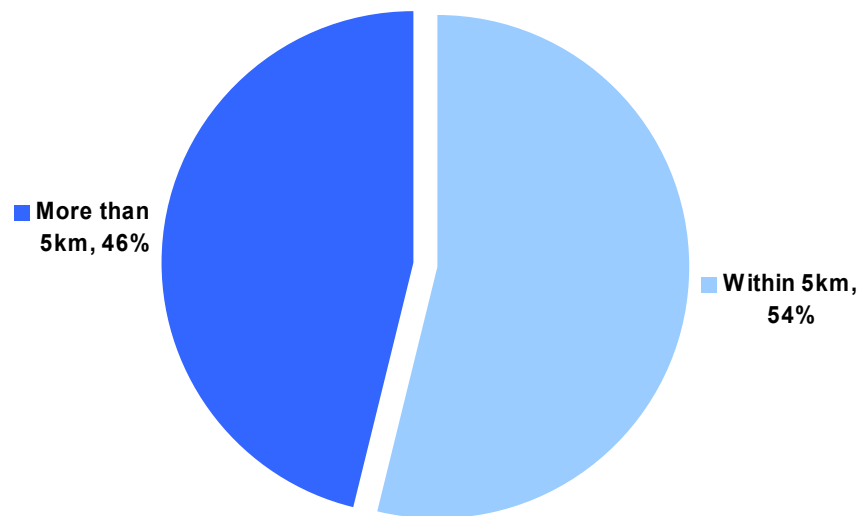
- Visitors from the Northern suburbs are the least likely to be male
- Visitors from the Eastern suburbs have the most even gender split
- For inner city, the base size was too small to generate a statistic, but it appears that about half of these respondents are male
- For definitions of these regions, please see the appendix



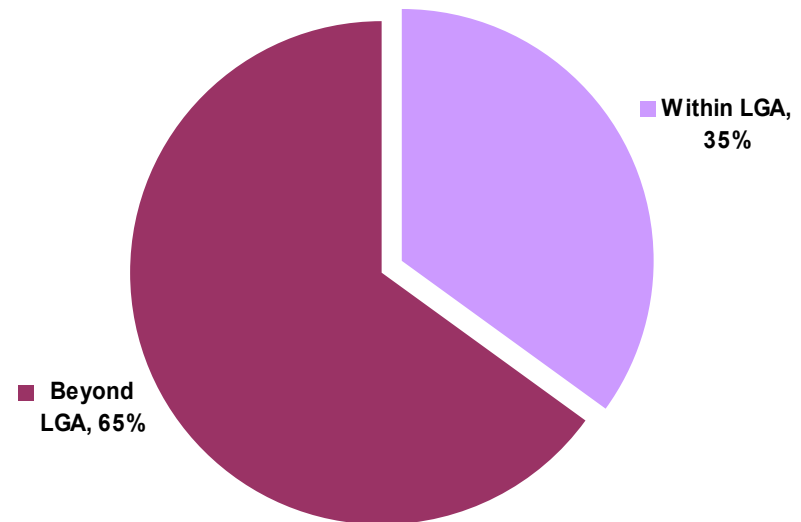
Q.16 What is your residential postcode?

Proximity

Geographic distance from gallery



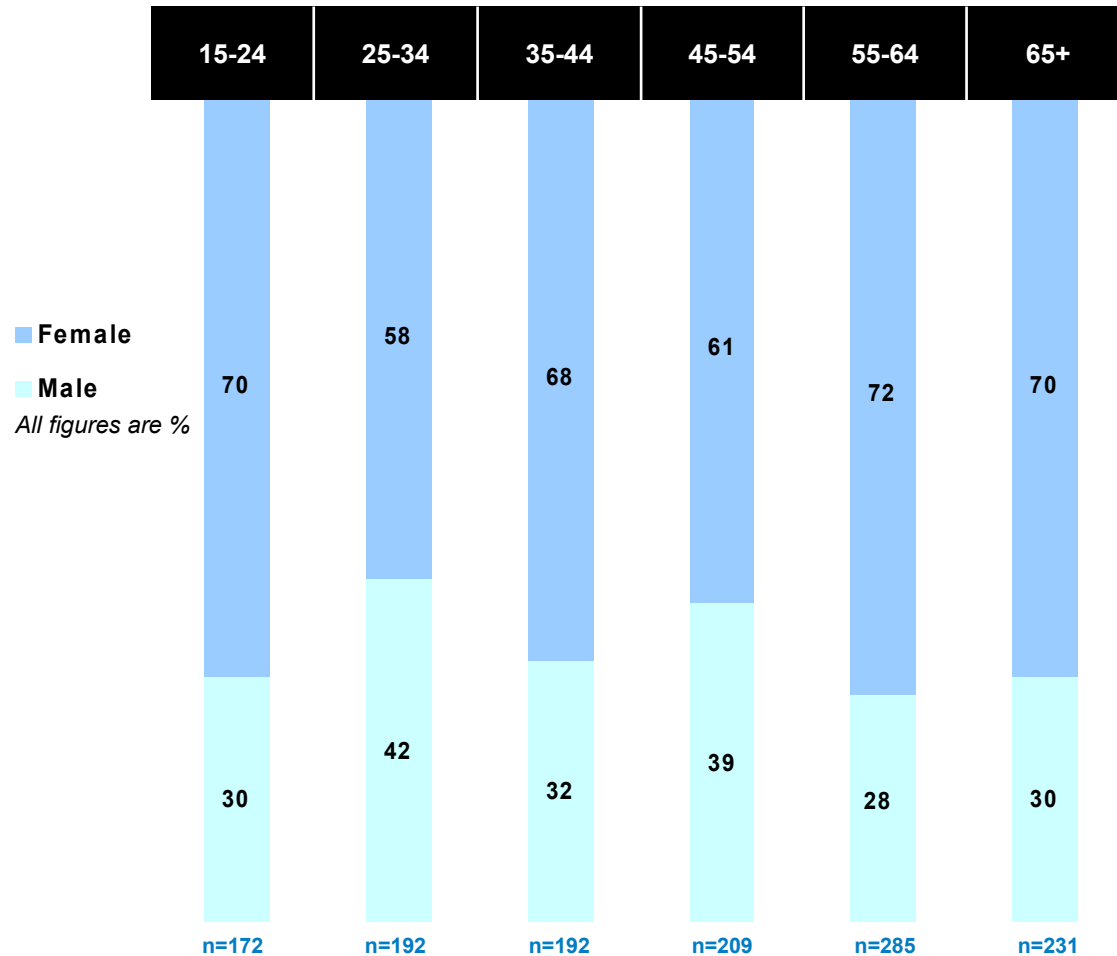
Inclusion in the Local Government Area of gallery



- The distance visitors live from the galleries varies widely. For some galleries, up to 70% of Sydney residents live within 5km of the gallery, whereas for others only 31% live within 5km of the gallery
- Galleries also differ dramatically with respect to the proportion of Sydney residents who live within the LGA of that gallery, and those who live beyond the LGA (from 66% to 41%)
- Galleries in suburban areas tend to attract a greater proportion of local visitors, whereas galleries in City areas attract visitors from all over the Sydney Metro region

Gender

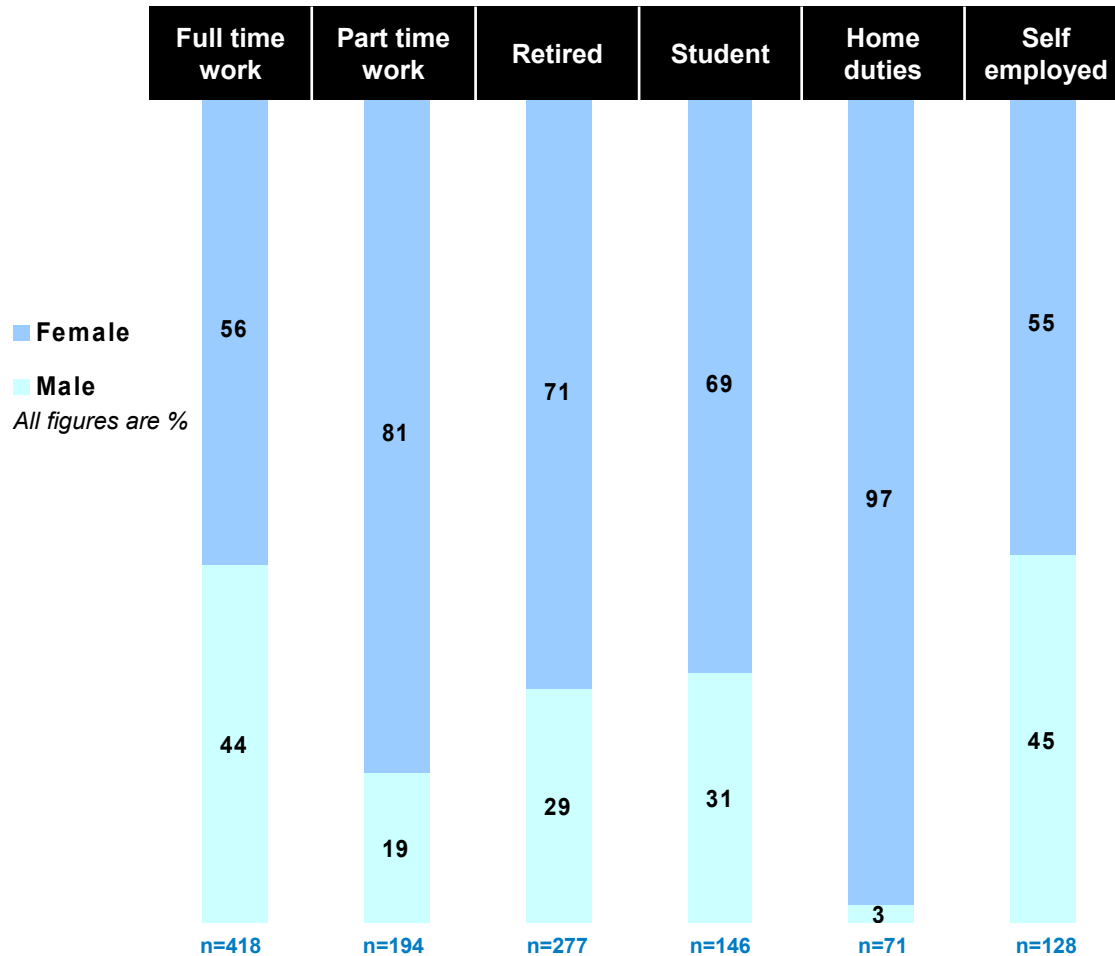
Breakdown by Age



- Male visitation is slightly higher in the 25-34 and the 45-54 age bands
- Women are in the majority at all age levels

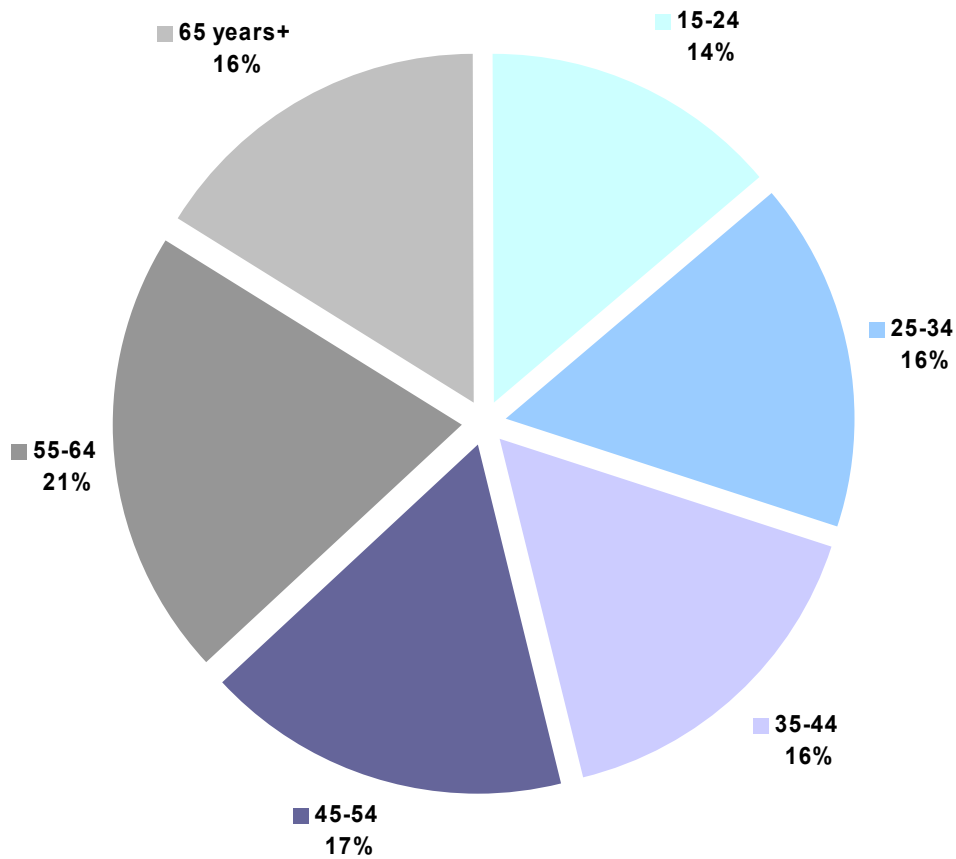
Gender

Breakdown by Employment Type



- Full time workers and self-employed were much more likely to be male
- On the other hand, “Home duties” are almost exclusively female

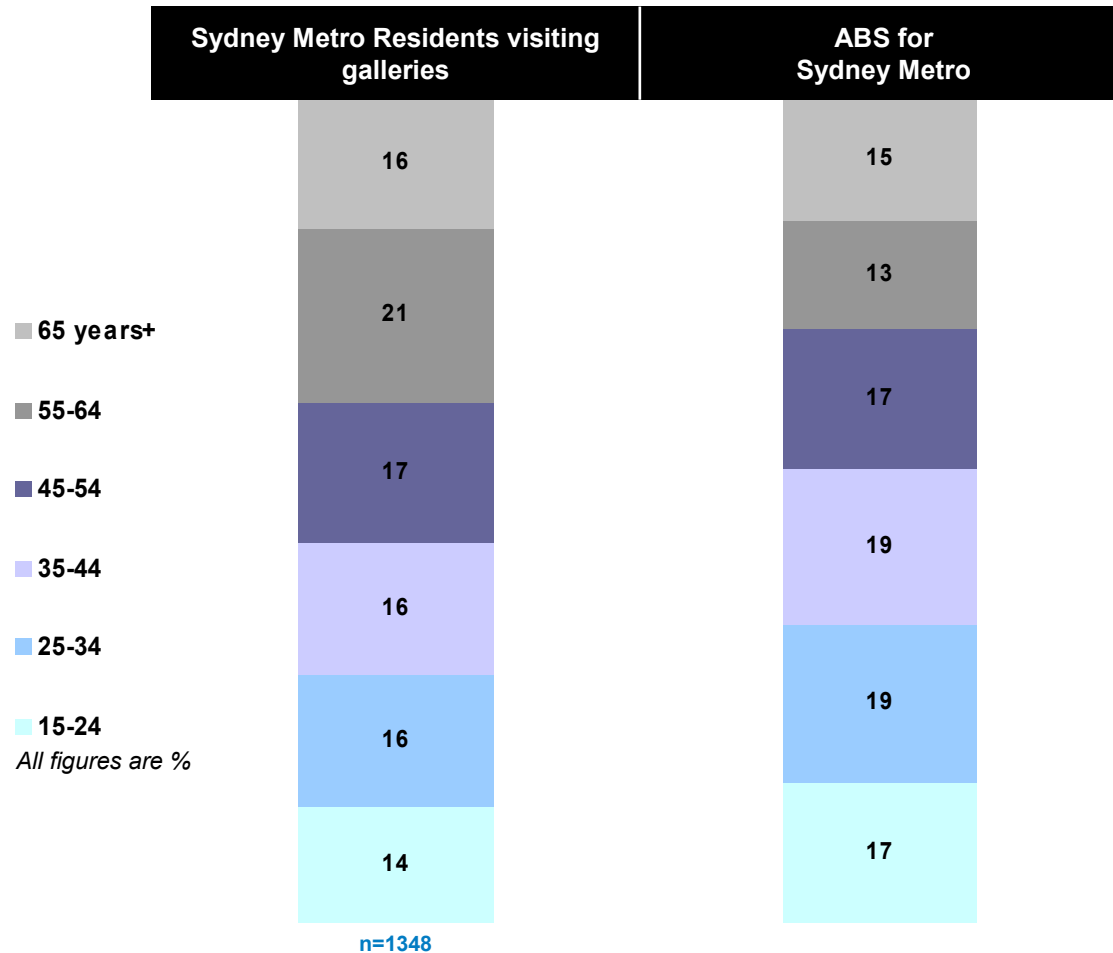
Age



- There is an even distribution of ages across Sydney residents

Age

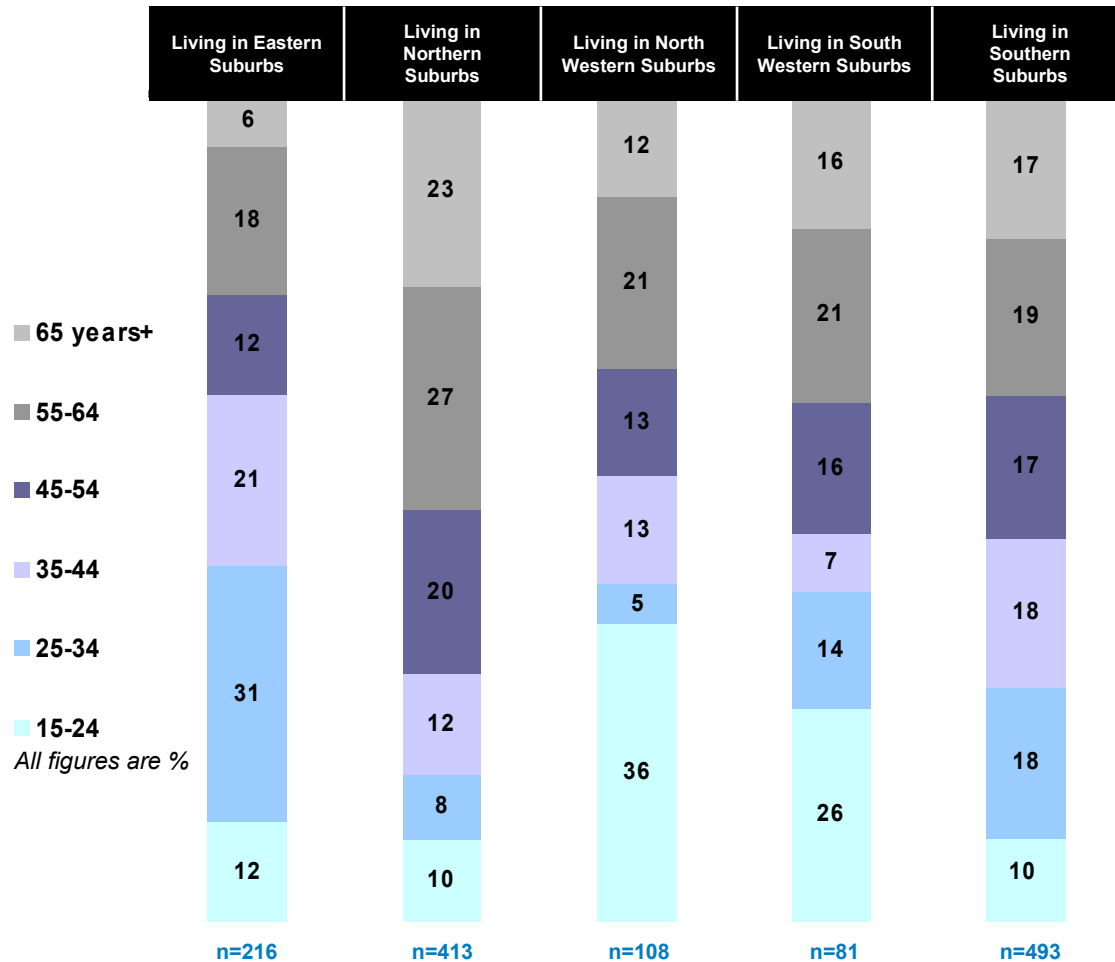
Comparisons to the Australian Bureau of Statistics (ABS)



- Overall Sydney Metro gallery audiences skew slightly older than the ABS data for the Sydney Metro region
- However, individual age brackets are generally proportional and representative of ABS
- There are significantly more 55-64 year old gallery visitors (21%) than the relative population proportion (13%)
- Note: ABS statistics have been re-based to exclude those less than 15 years of age

Age

Breakdown by Residential Postcode

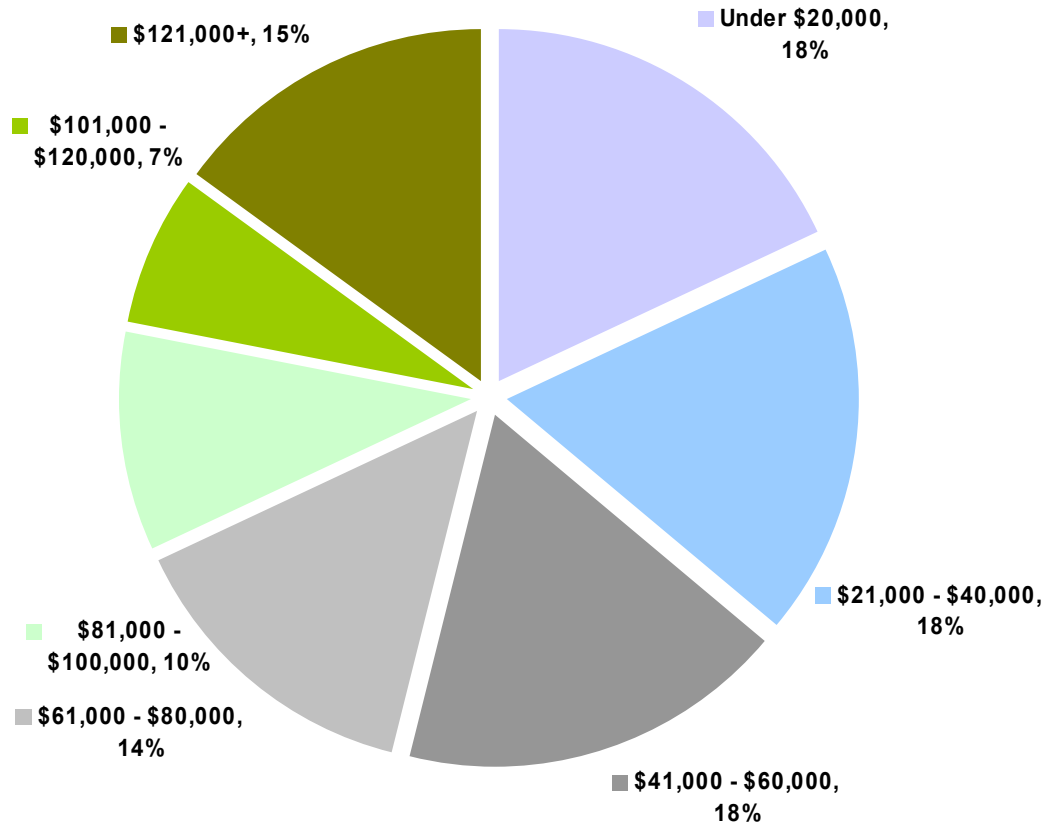


- Visitors from the Northern suburbs are more likely to be older than other regions
- Visitors who reside in the North Western suburbs and South Western suburbs are more likely to be younger (under 24)

Q26. Which of the following age groups are you in?

Q16. What is your residential postcode?

Income

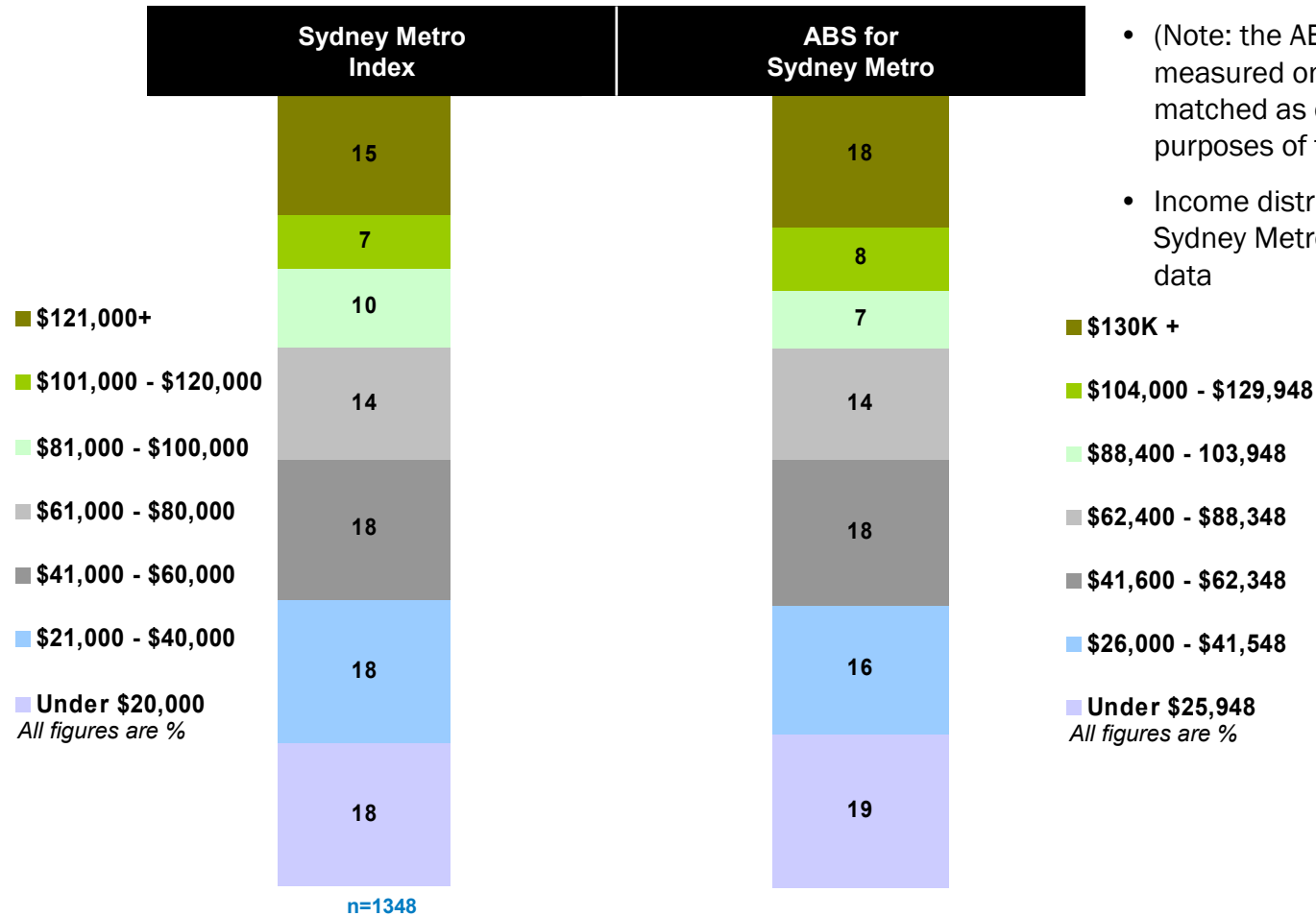


- Visitors from all income levels are represented

SYDNEY RESIDENT REPORT

Income

Comparison to the Australian Bureau of Statistics (ABS)

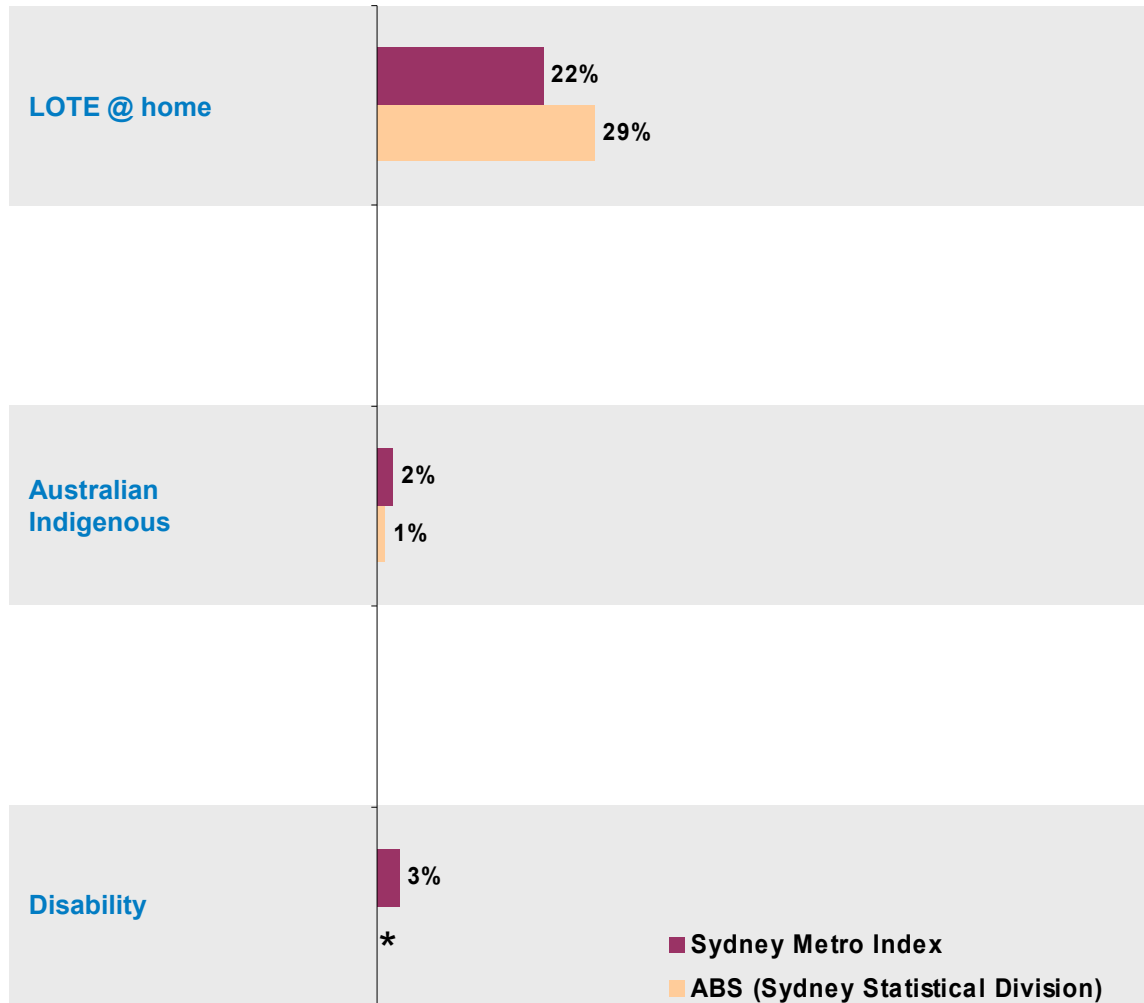


- (Note: the ABS income distribution is measured on a different scale, but has been matched as closely as possible for the purposes of this analysis)
- Income distribution for gallery visitors in Sydney Metro seems to be proportional to ABS data

- \$130K +
 - \$104,000 - \$129,948
 - \$88,400 - 103,948
 - \$62,400 - \$88,348
 - \$41,600 - \$62,348
 - \$26,000 - \$41,548
 - Under \$25,948
- All figures are %

Diversity

Comparison to the Australian Bureau of Statistics (ABS)



- The number of visitors speaking a language other than English at home (LOTE) varies considerably amongst galleries (from 8% to 35%)
- The index does not reflect the total amount of LOTE visitors in the galleries
- The representation of Australian Indigenous visitors is fairly similar to the ABS for the Sydney Statistical Division

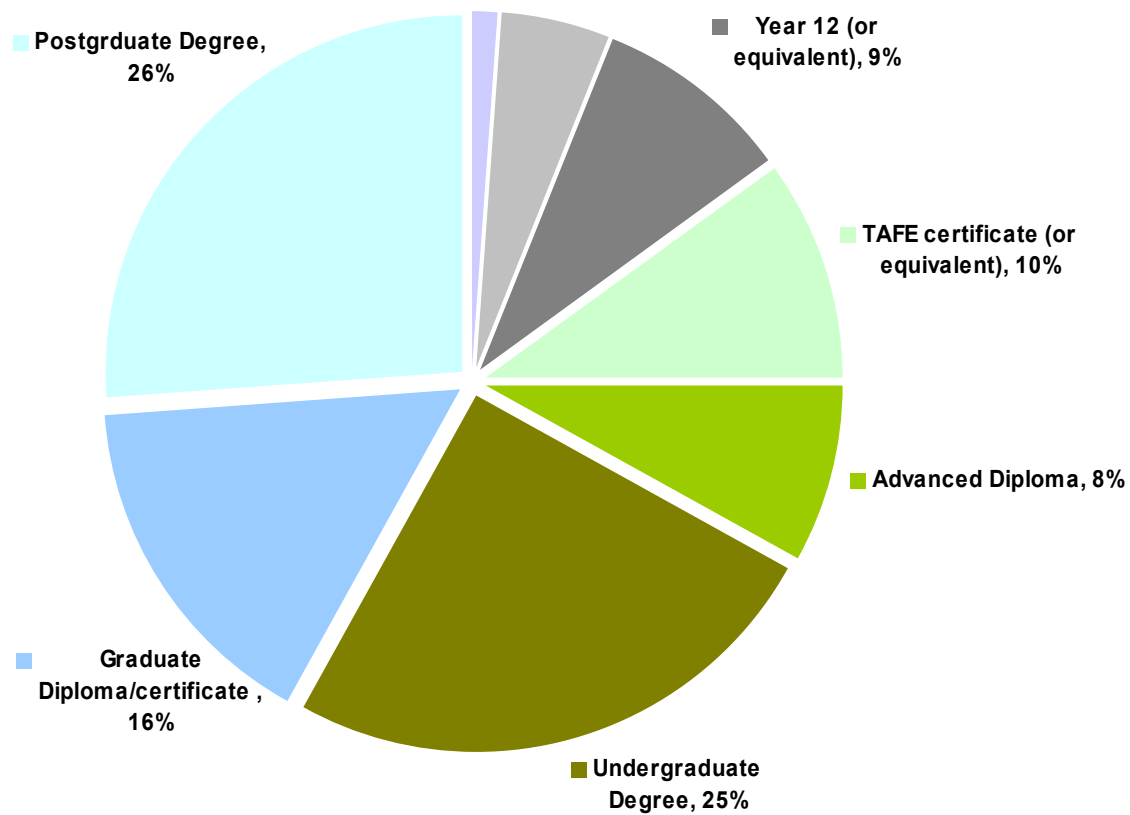
Q14. Do you speak a language other than English at home?

Q13. Are you of Aboriginal or Torres Strait Islander decent?

Q25. Do you have a disability or other condition that impacted on your visit today?

* No data available for a valid comparison for “disability or other condition that impacted on your visit today”

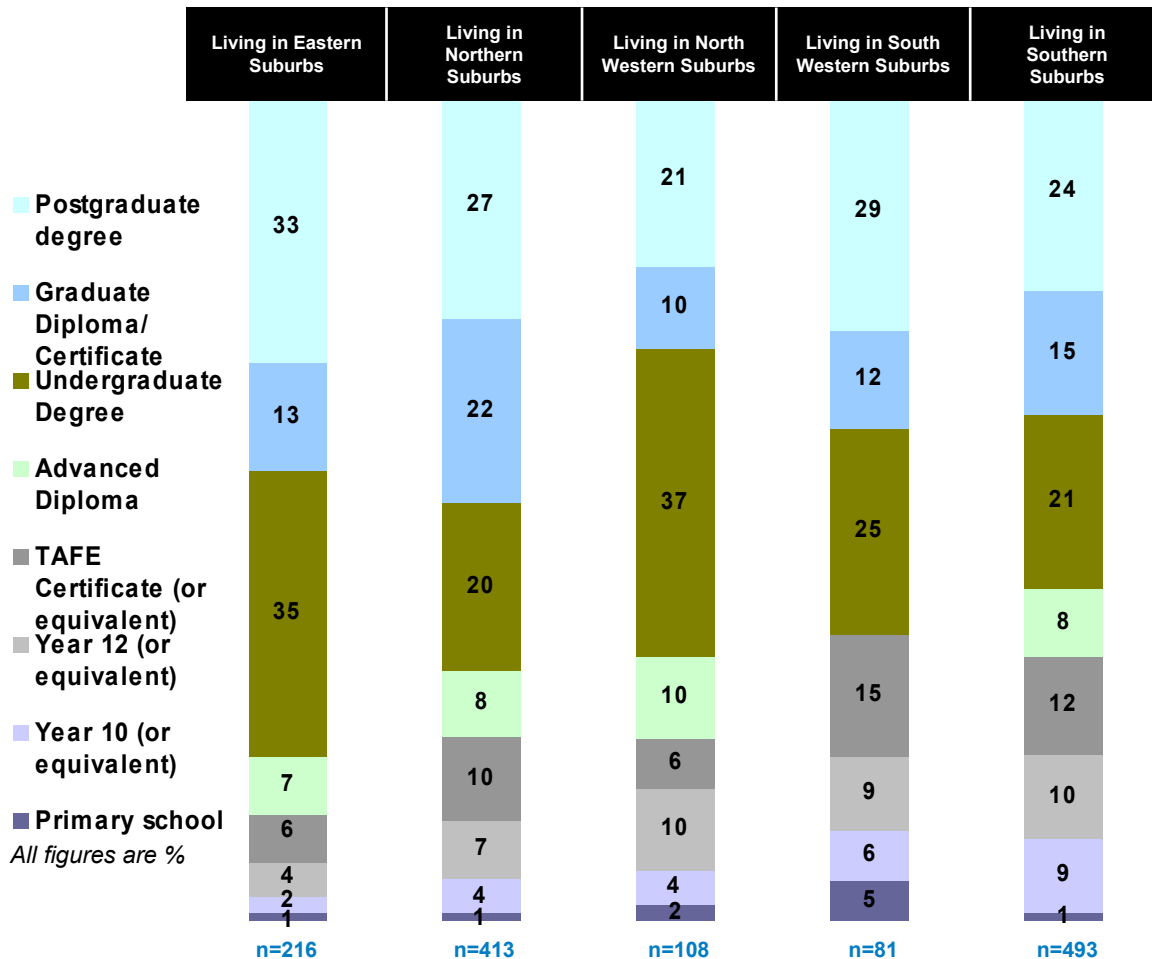
Education



- About 2 in 3 visitors to galleries have a tertiary qualification

Education

Breakdown by Residential Postcode

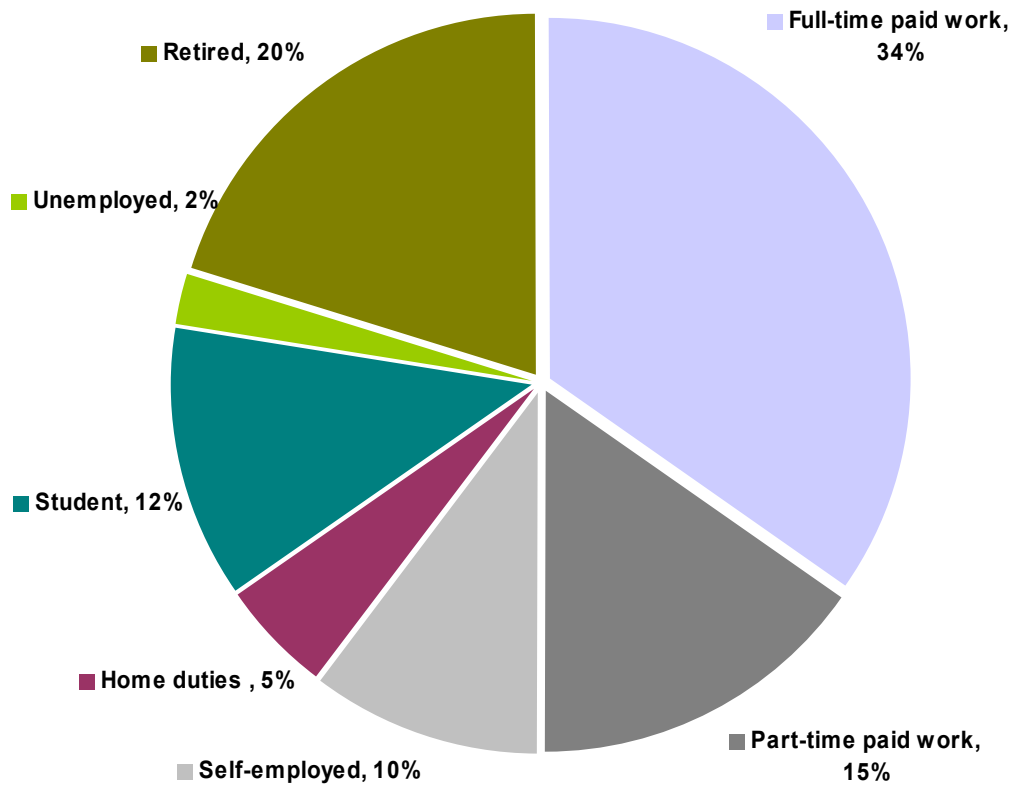


- Gallery visitors from the Eastern suburbs are most likely to hold a tertiary qualification (86%)

Q18. What is your highest level of education?

Q16. What is your residential postcode?

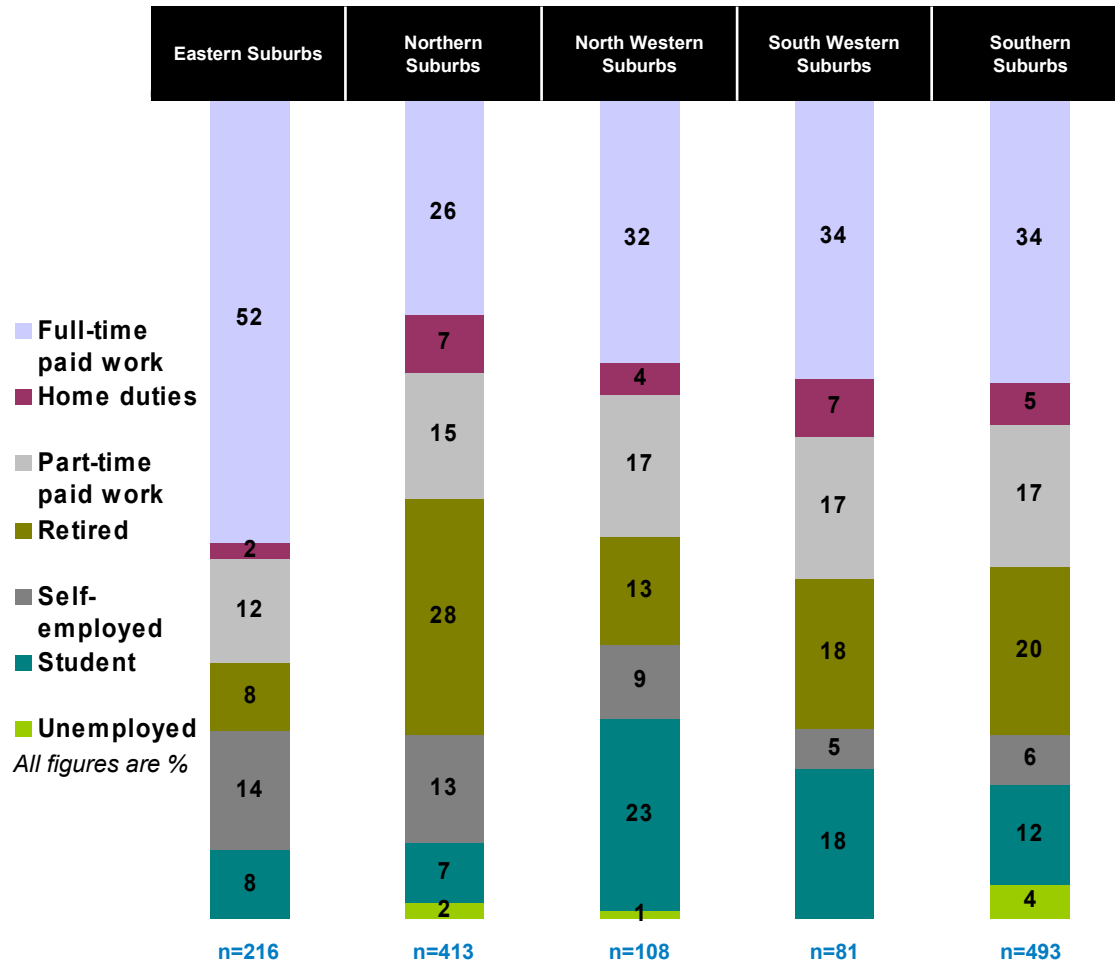
Work Status



- At least half of all visitors are employed
- Galleries differ widely in their proportion of full-time workers (from 65% to 16%)
- Retirees make up around 1 in 5 visitors overall, but this also differs widely amongst galleries (from 4% to 40%)

Work Status

Breakdown by Residential Postcode



- Visitors from the Eastern suburbs are much more likely to be full time workers
- Visitors from the Northern suburbs are much more likely to be retired
- Visitors from the West are more likely to be students

Q24. What is your MAIN occupation?

Q16. What is your residential postcode?

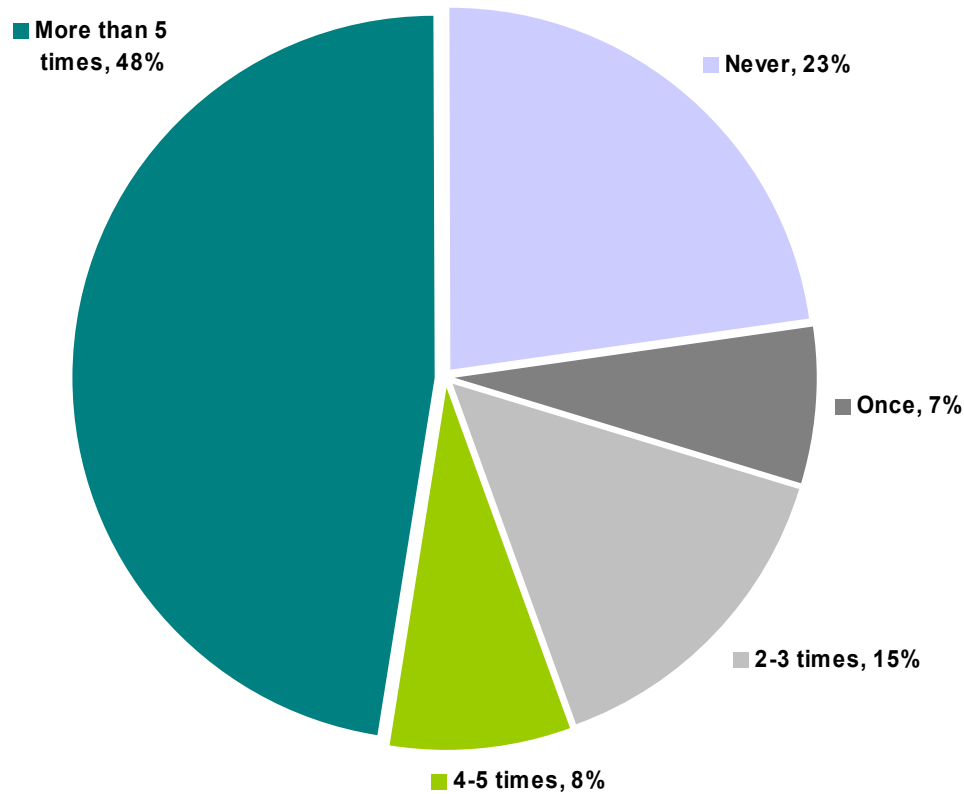
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Visitor Behaviour



IMAGE © Emmanuel Giraud Installation view of *Human Figure* at the ACP 2008

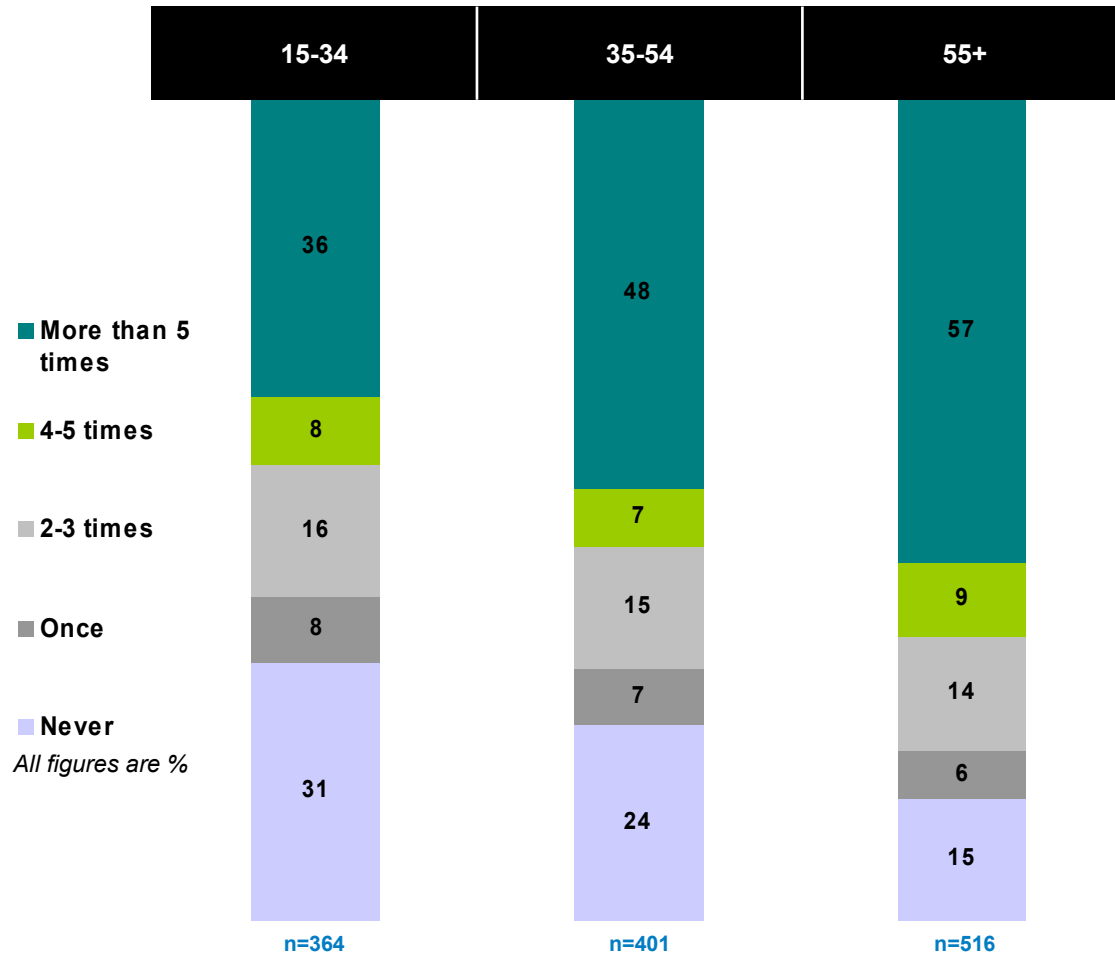
Number of times visited



- Nearly half of visitors overall had visited their gallery more than 5 times in the previous year
- Galleries differ widely with respect to the proportion of visitors who have visited more than 5 times before (from 15% to 70%)
- The number of first-time visitors also differs dramatically (from 10% to 50%)

Number of times visited

Breakdown by Age



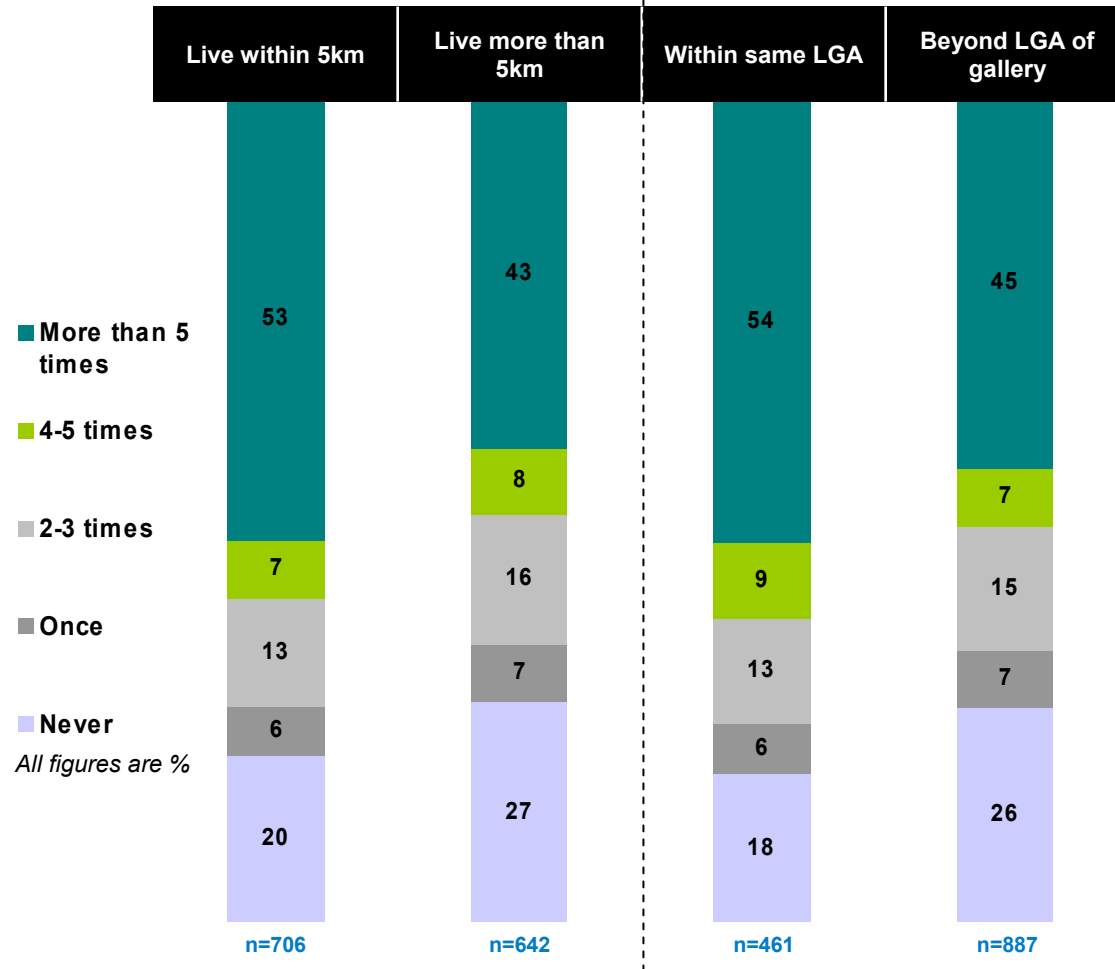
- Older respondents are more likely to have visited the gallery more than 5 times

Q26. Which of the following age groups are you in?

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

Number of times visited

Breakdown by Proximity and Local Government Area (LGA) status



- Those who live closer to the gallery and/or who live within the same LGA, are more likely to have visited the gallery more than 5 times before, and less likely to be first time visitors

Q15. Where do you usually live?

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

Number of times visited

Breakdown by Frequency of Visitation to Other Galleries in Metro Sydney



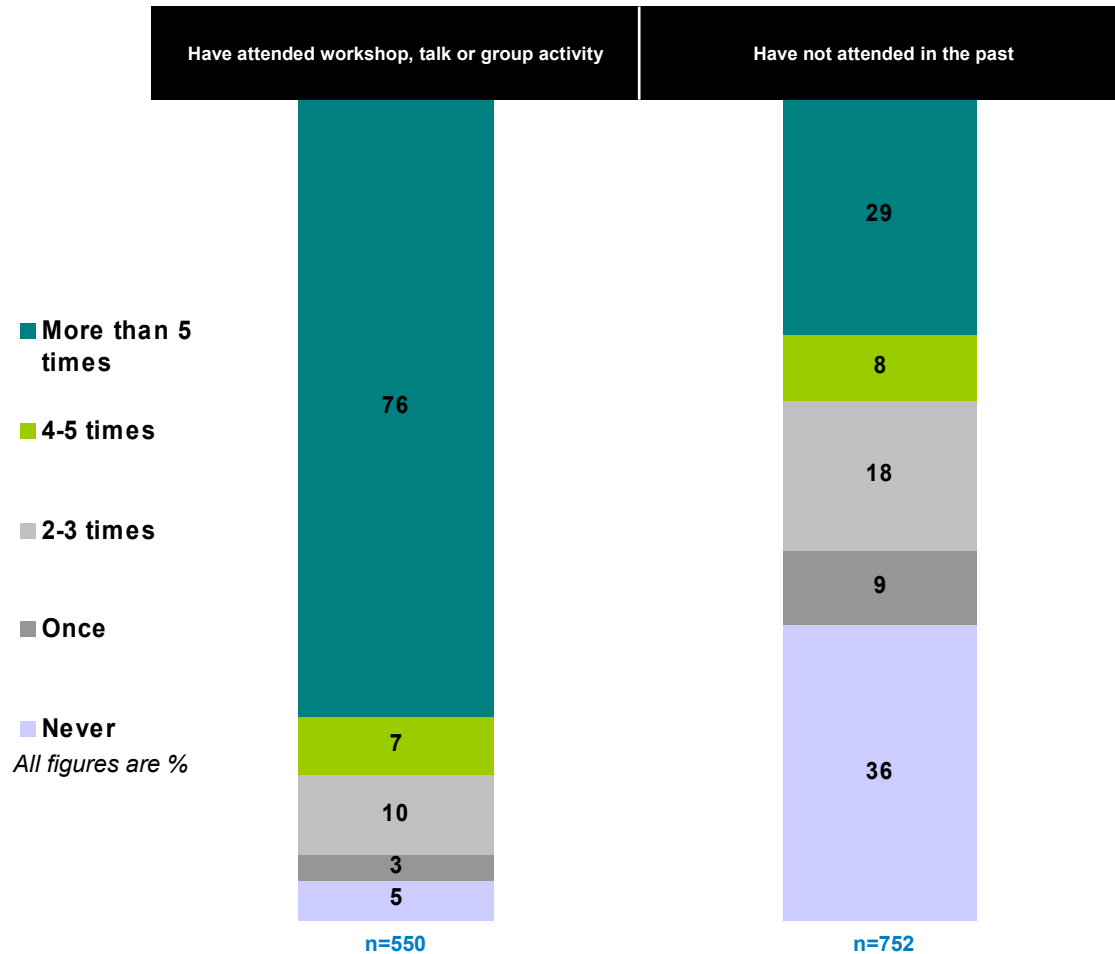
- There is a clear correlation between the number of times Sydney residents visit a particular gallery in Metro Sydney and the number of times they visit *other* galleries in Metro Sydney

Q.23. Thinking about the past 12 months, how many times have you been to a Museum or Gallery in Metro Sydney?

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

Number of times visited

Breakdown by Attendance at a Workshop, Talk or Group Activity

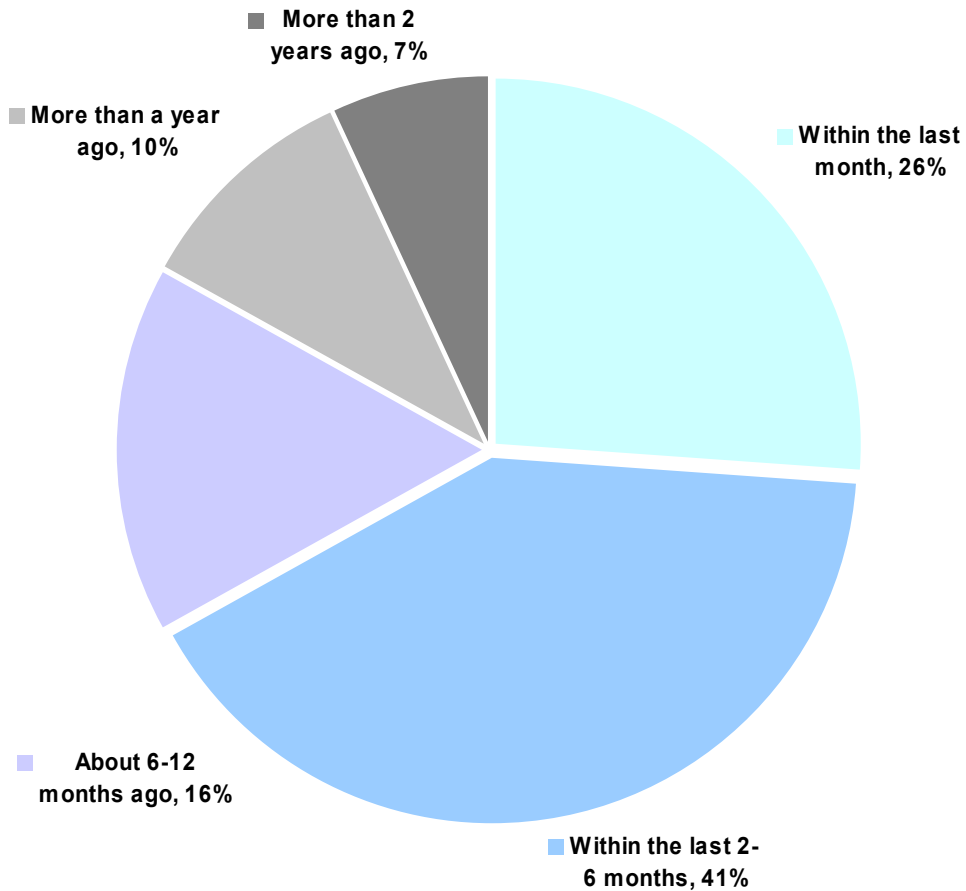


- Sydney residents (or their family) who have attended a workshop, talk or group activity in the past relates to the number of times they have visited the gallery in the past

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

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

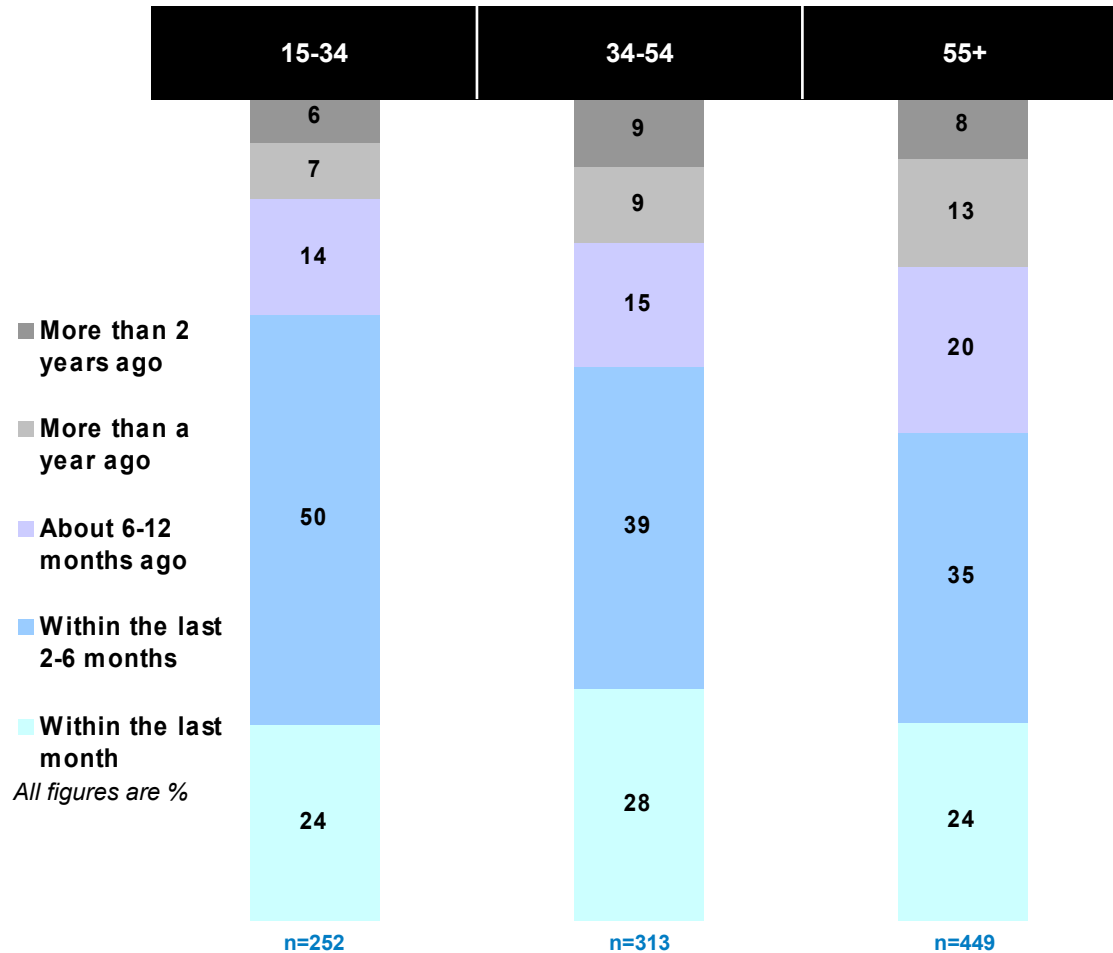
When last visited



- Of those who had visited before, about 2 in 3 had done so within the last 6 months
- Galleries differ somewhat in the number of visitors who had visited within the last 6 months (52% to 83%)

When last visited

Breakdown by Age



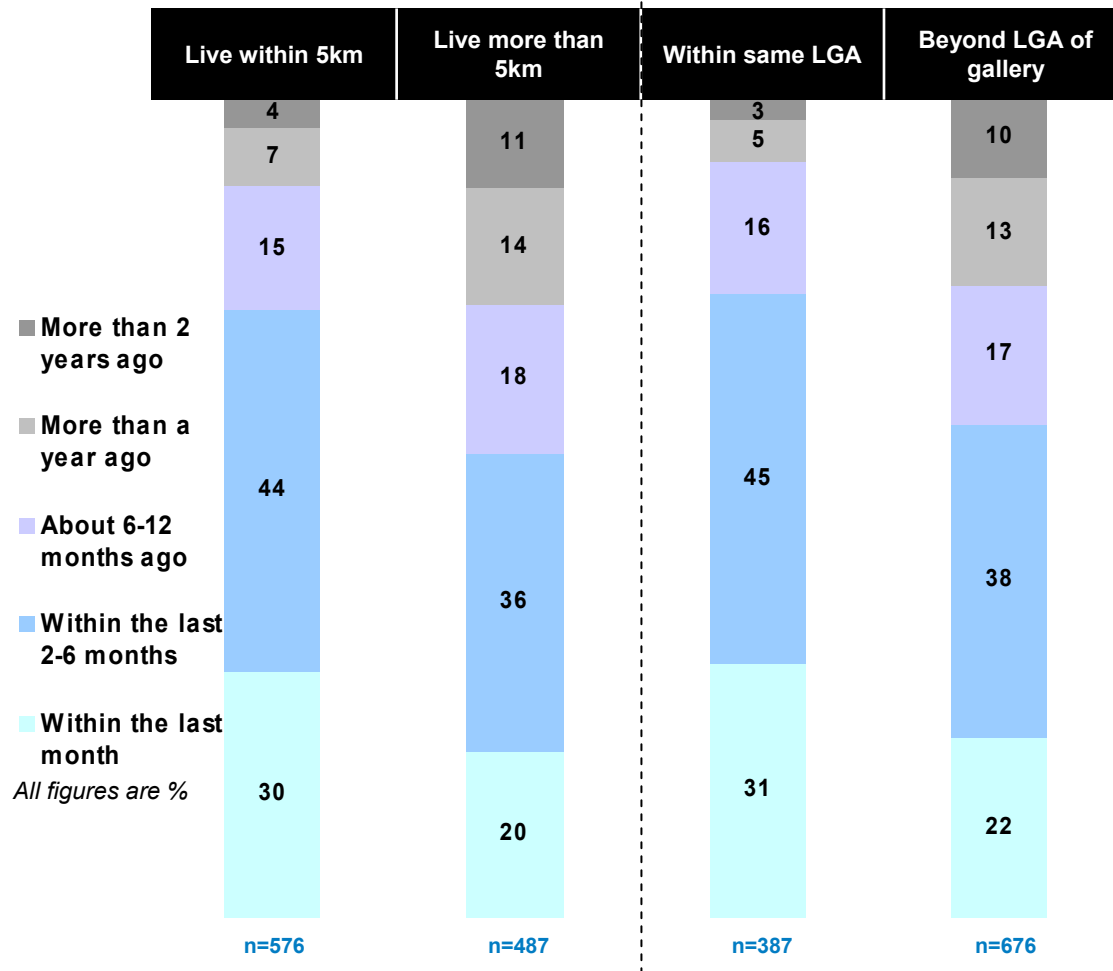
- Younger visitors are slightly more likely to have visited within the last 6 months

Q26. Which of the following age groups are you in?

Q2. When was your last visit?

When last visited

Breakdown by Proximity and Local Government Area (LGA) status



- Those who live closer to their gallery are more likely to have visited the gallery within the last month

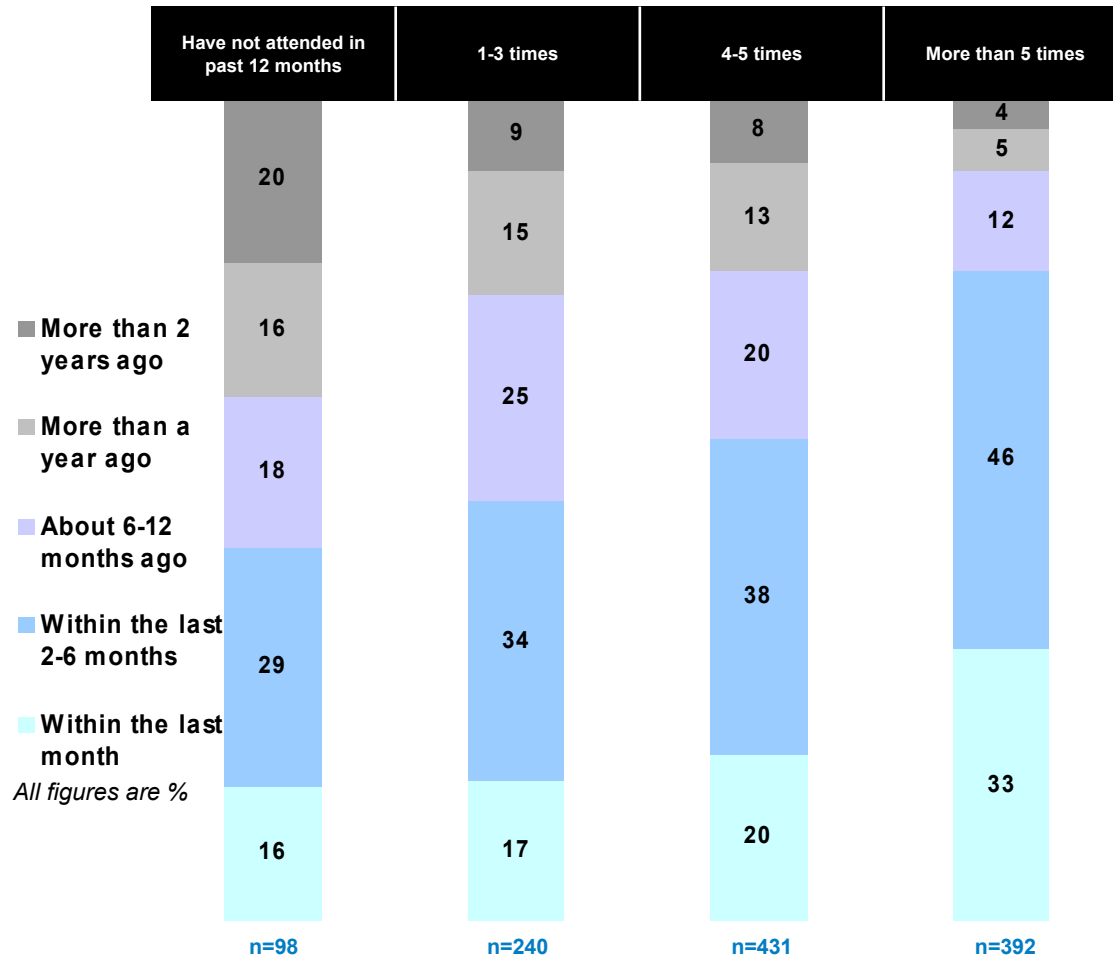
Q16. What is your residential postcode?

Q2. When was your last visit?

Base: Sydney Metro Residents, have visited before

When last visited

Breakdown by Frequency of Visitation to Other Galleries in Metro Sydney



- There is a clear trend in the data such that those who visit the gallery more often are more likely to have visited more recently

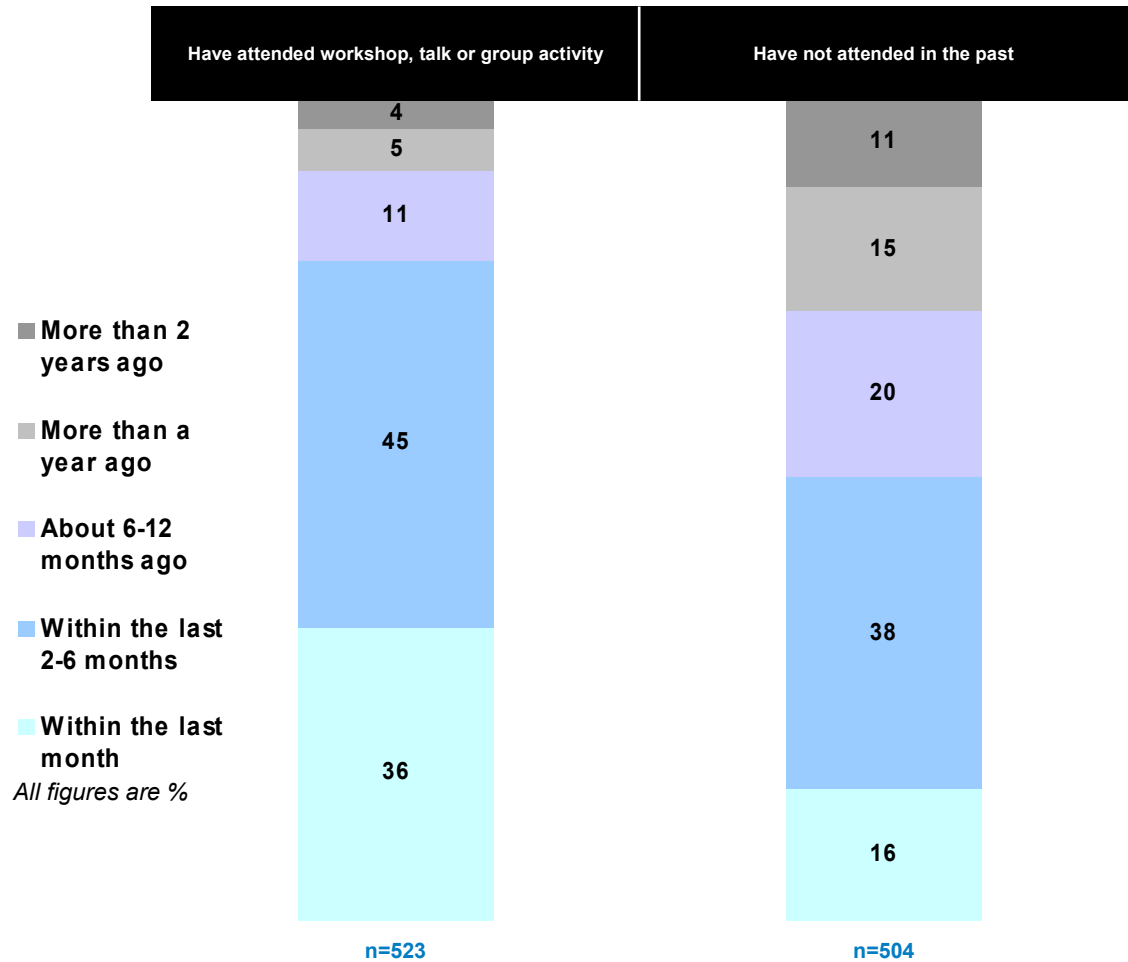
Q23. Thinking about the last 12 months, how many times have you been to a museum or gallery in Metro Sydney?

Q2. When was your last visit?

Base: Sydney Metro Residents, have visited before

When last visited

Breakdown by Attendance at Workshop, Talk or Group Activity



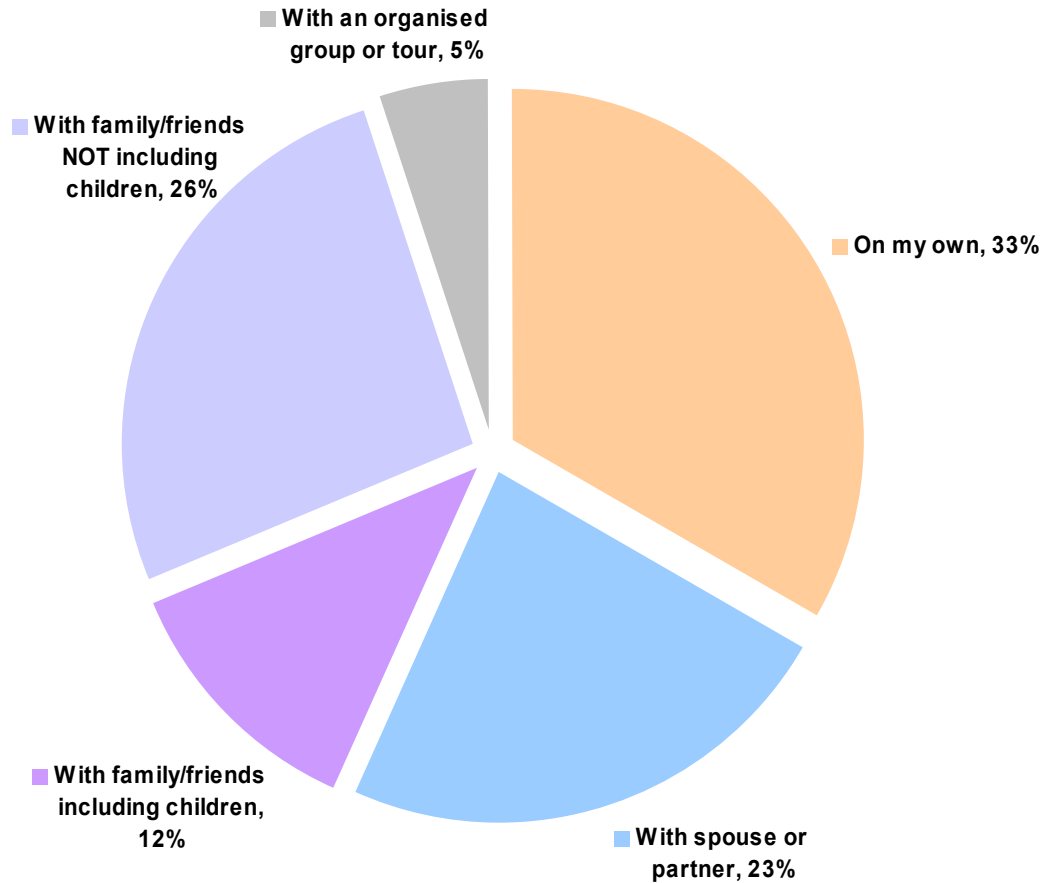
- Those who had attended workshop, talk or group activity in the past are more likely to have visited the gallery in the past 6 months (81%)

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

Q2. When was your last visit?

Base: Sydney Metro Residents, have visited before

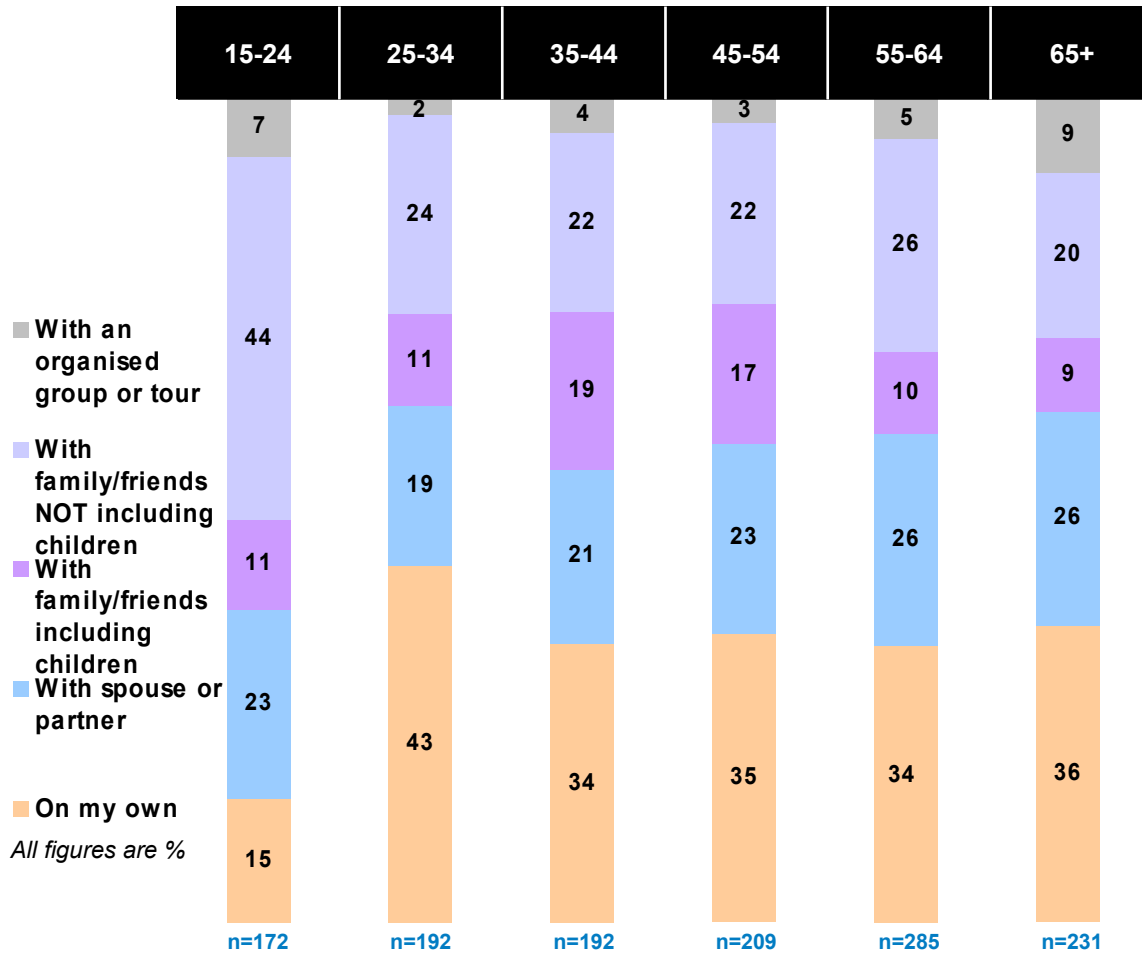
Who visited with



- About 1 in 3 visitors are visiting on their own
- The proportion of visitors coming on their own varies widely amongst galleries (from 17% to 51%)

Who visited with

Breakdown by Age



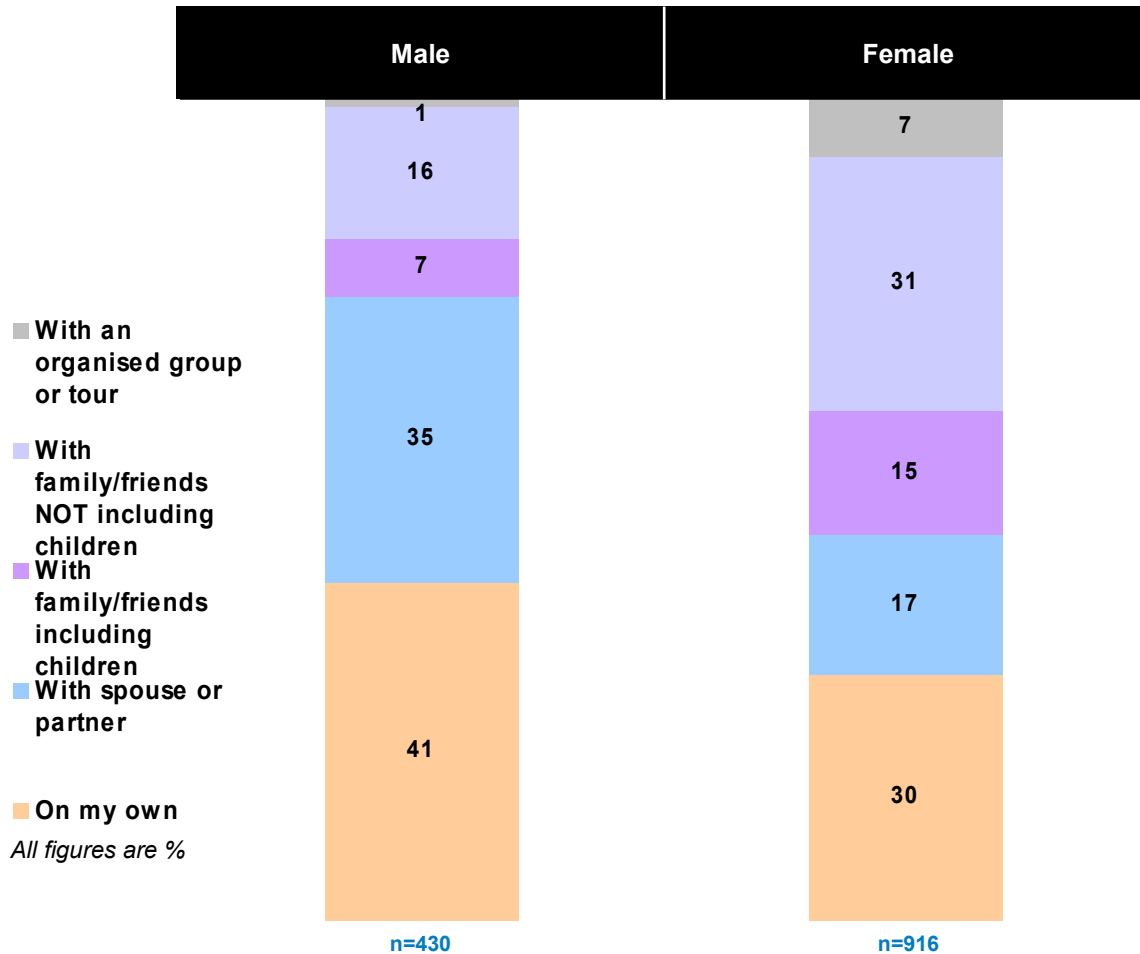
- Younger visitors (15-24) are much more likely to visit with family/friends than other age groups (44%), and less likely to visit on their own (15%)
- 25-34 year olds are most likely to visit on their own

Q26. Which of the following age groups are you in?

Q3. Who were you visiting with today?

Who visited with

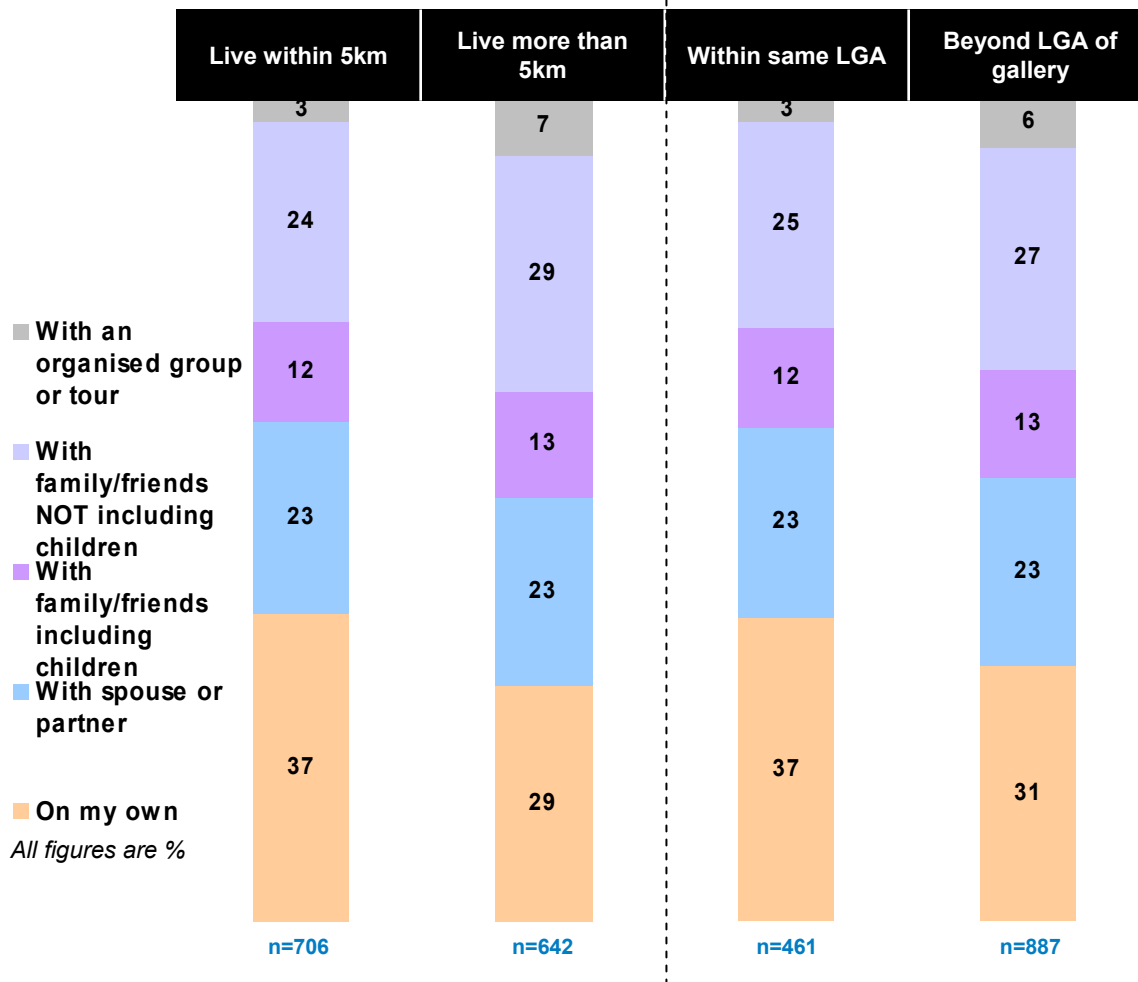
Breakdown by Gender



- Men are much more likely to visit on their own, compared to women (41% vs. 30%)
- Men were half as likely as women to visit with children (7% vs. 15%)

Who visited with

Breakdown by Proximity and Local Government Area (LGA) status



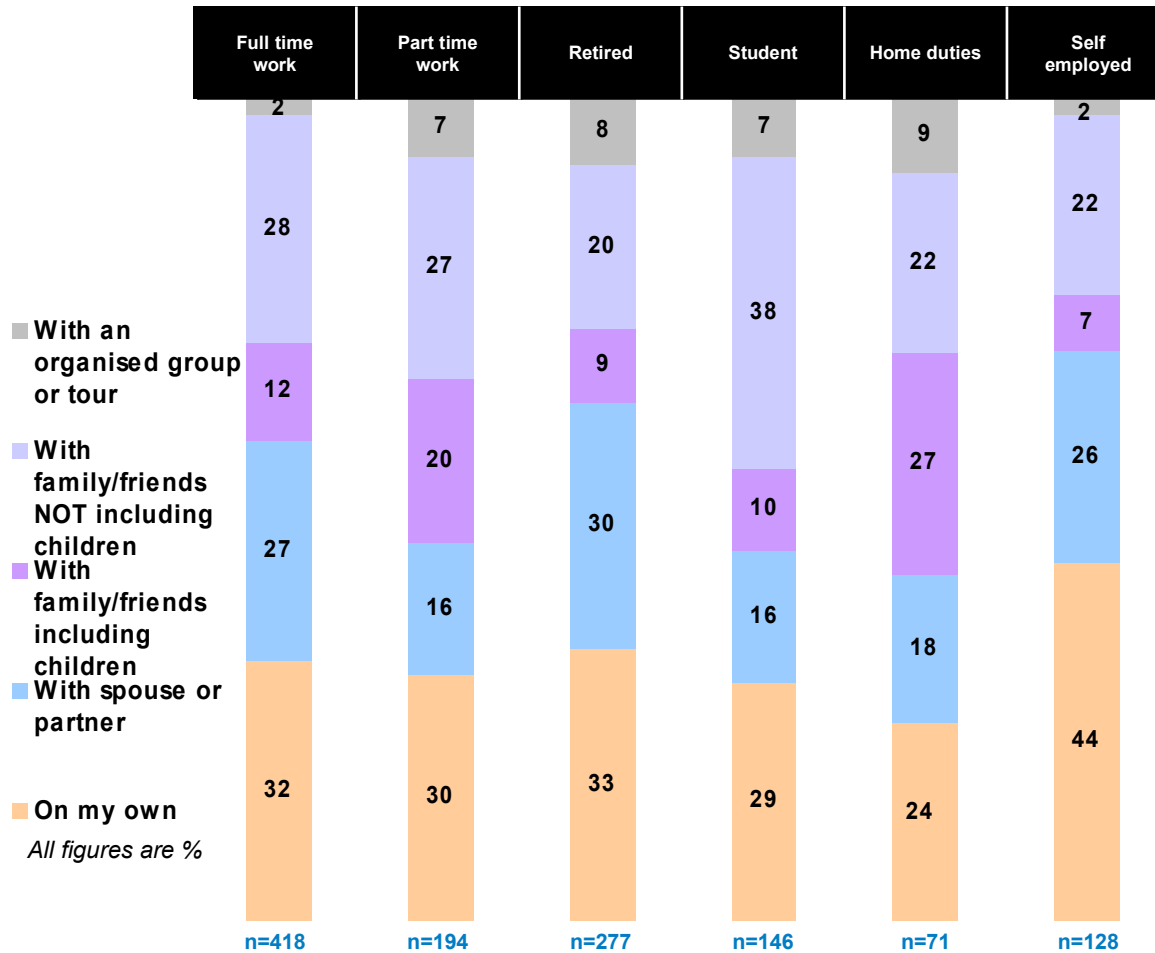
- Sydney residents who live closer to the gallery are slightly more likely to visit on their own

Q16. What is your residential postcode?

Q3. Who were you visiting with today?

Who visited with

Breakdown by Employment Type



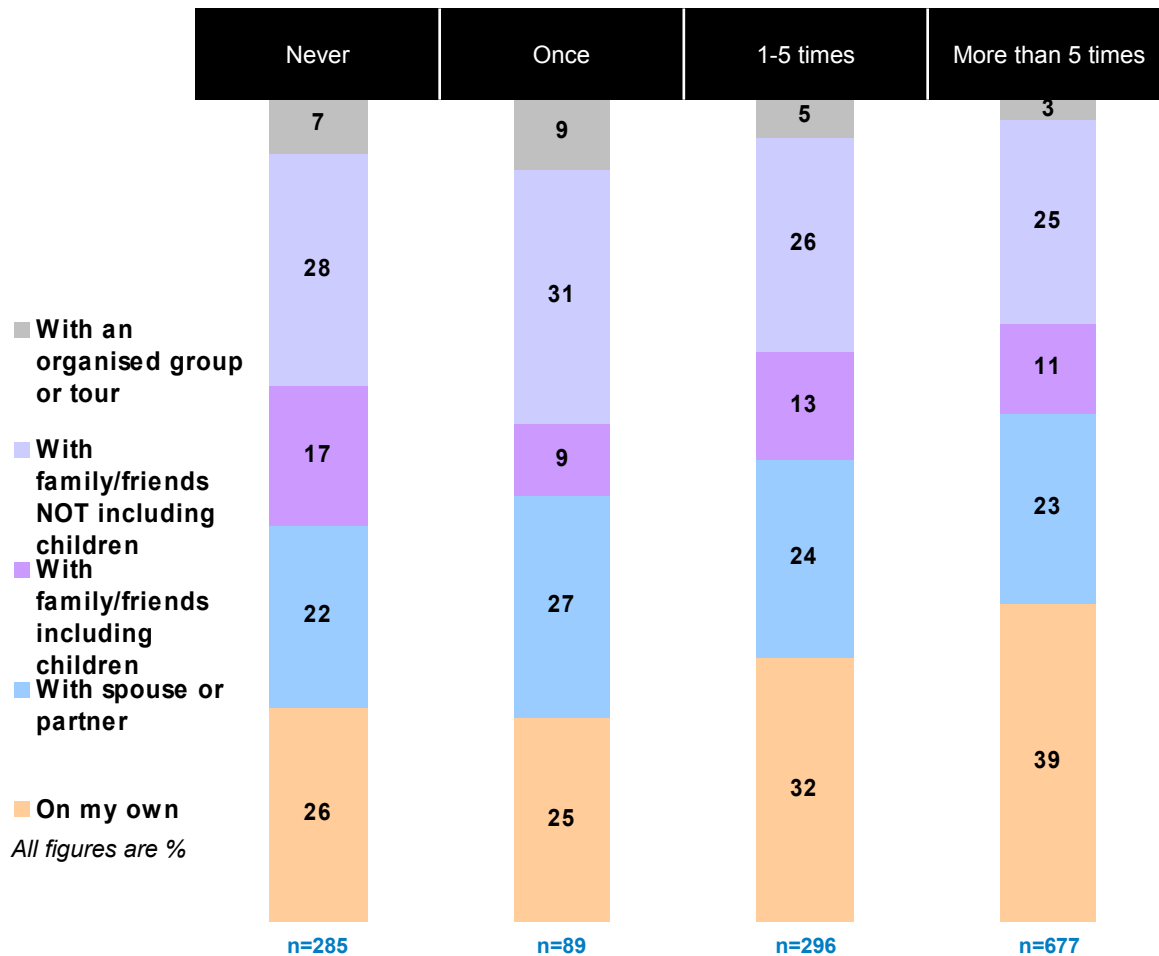
- Self-employed visitors are most likely to visit on their own

Q24. What is your MAIN occupation?

Q3. Who are you visiting with today?

Who visited with

Breakdown by Number of Previous Visits

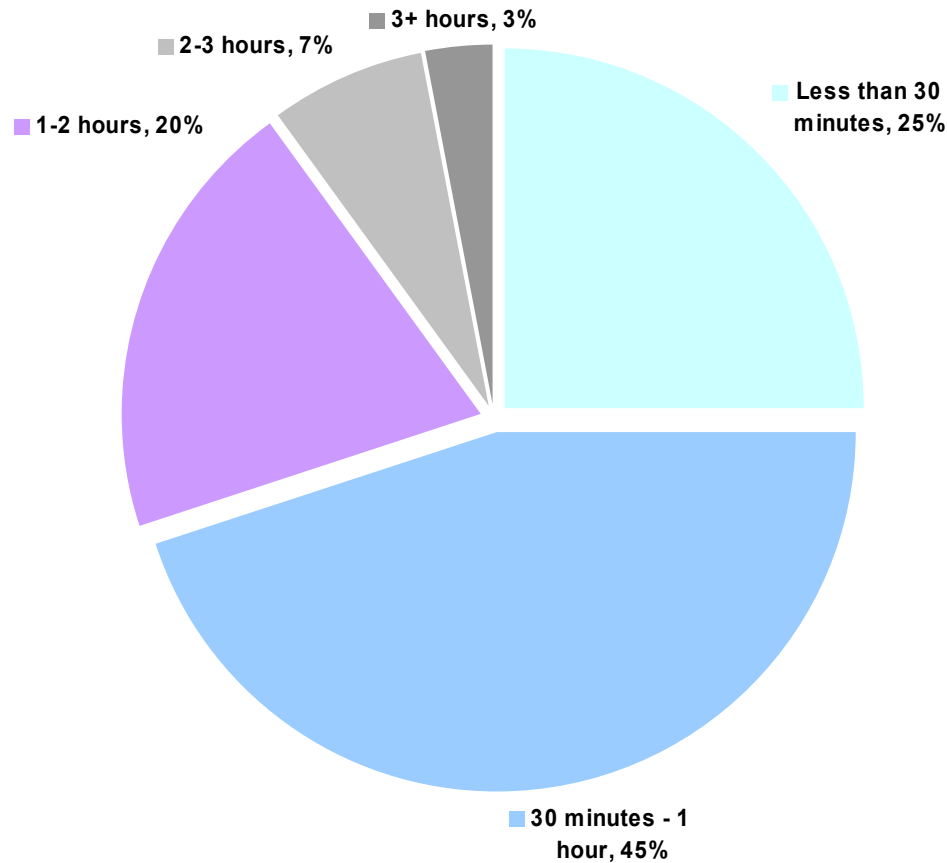


- Visitors who have visited more than 5 times before were more likely to visit the gallery on their own (39%)

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

Q3. Who are you visiting with today?

Length of visit

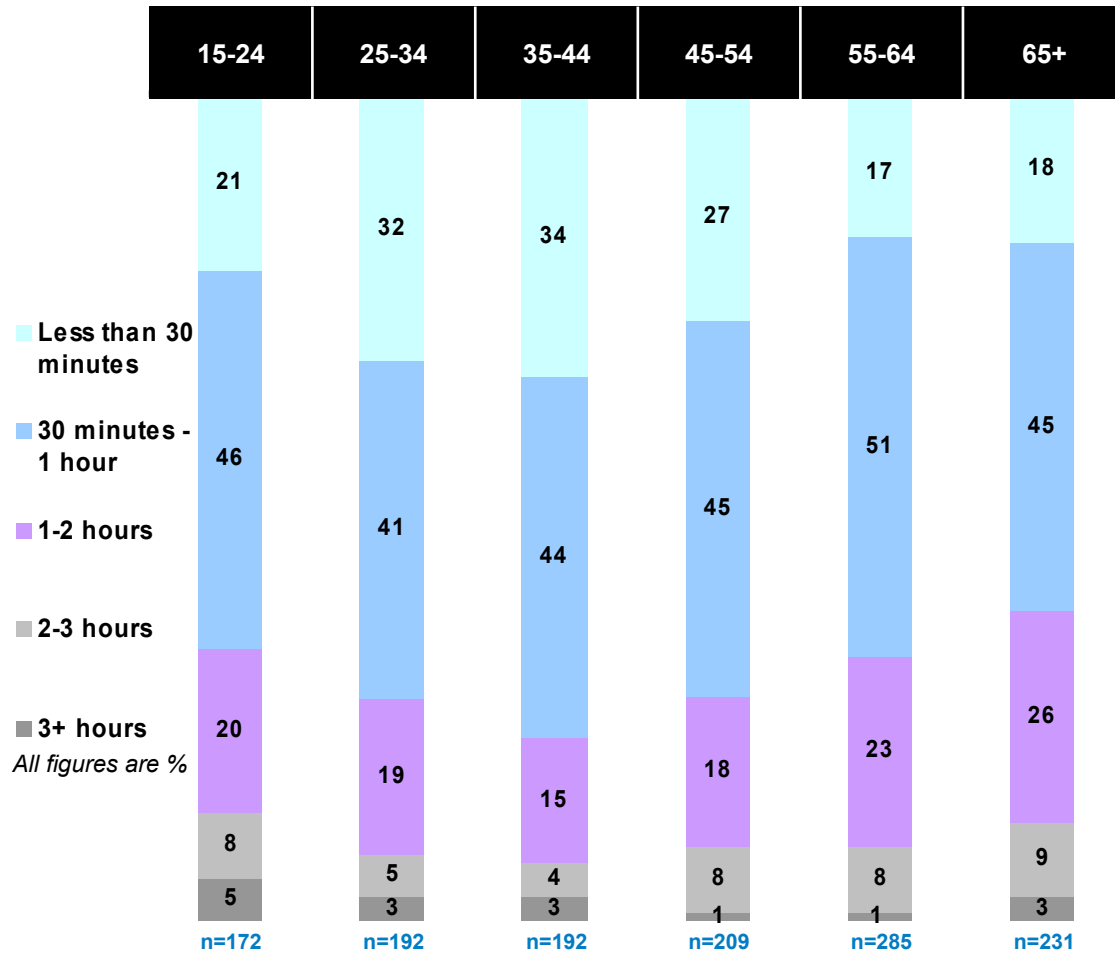


- About 1 in 4 visitors are spending less than 30 minutes in the gallery
- The proportion of Sydney residents spending less than 30 minutes in the gallery varies widely across galleries (from 4% to 60%)
- The proportion of visitors coming on their own varies widely amongst galleries (from 17% to 51%)

Length of visit

Breakdown by Age

- 25-44's were most likely to be making shorter visits to the gallery



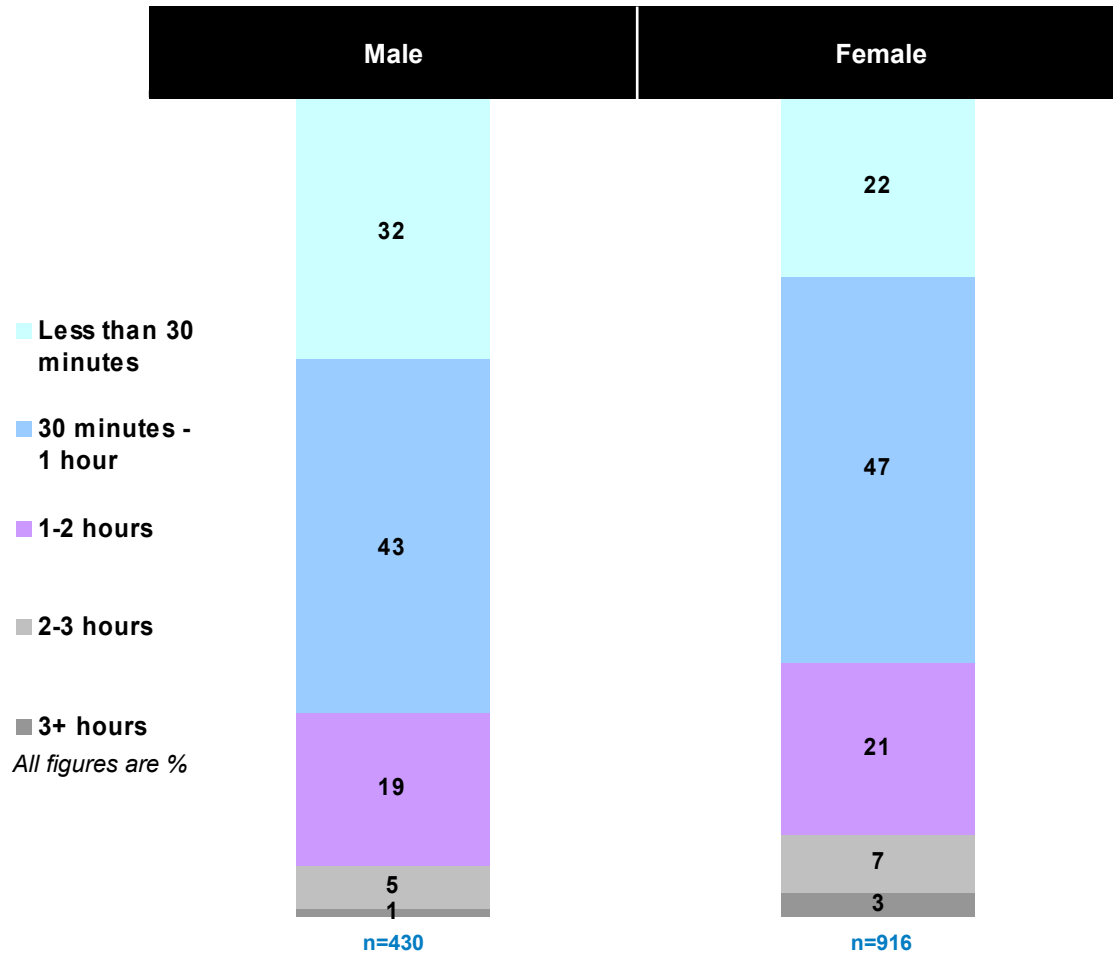
Q26. Which of the following age groups are you in?

Q4. How long was your visit today?

Length of visit

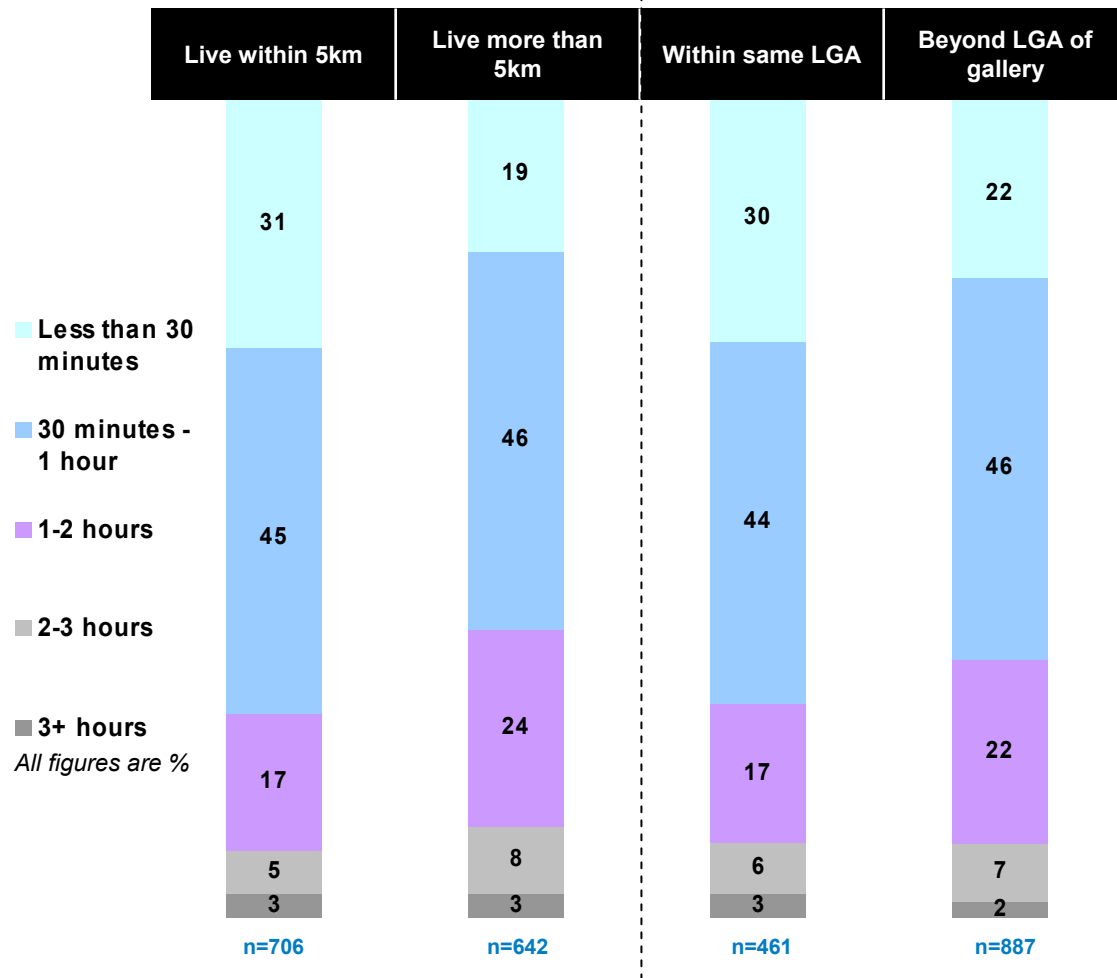
Breakdown by Gender

- Men make slightly shorter visits to the gallery than women overall



Length of visit

Breakdown by Proximity and Local Government Area (LGA) status



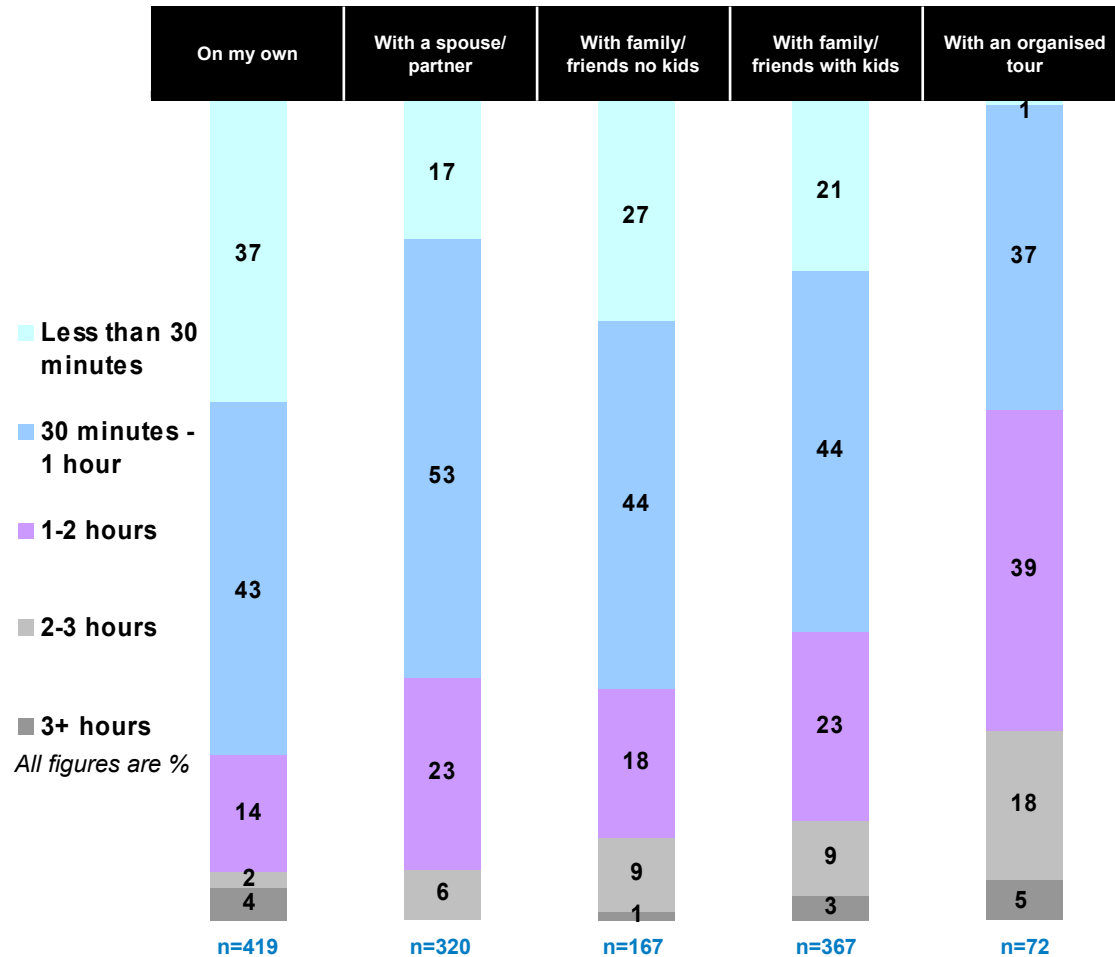
- Sydney residents who live closer to the gallery are more likely to make shorter visits to the gallery

Q16. What is your residential postcode?

Q4. How long was your visit today?

Length of visit

Breakdown by Who Visiting With



- Those who visit on their own are most likely to be spending less than 30 minutes in the gallery (37%)

Q3. Who are you visiting with today?

Q4. How long was your visit today?

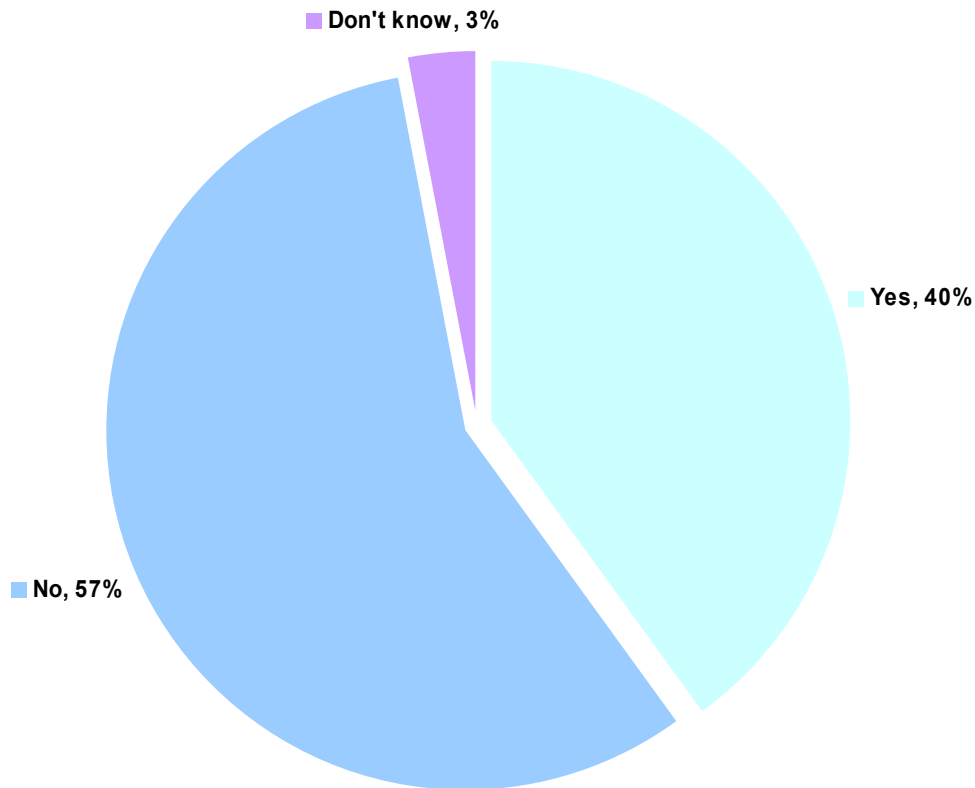
M&G NSW

Information, Interests and Motivations



Brook Andrew, Interviews, 2006, installation view, ArtSpace, Sydney, 2008

Attendance at workshop, talk or group activity



- Overall, around 2 in 5 Sydney Resident visitors (or their families) have attended a workshop, talk or group activity in the past
- There is some degree of variation amongst galleries in this figure (from 24% to 54%)

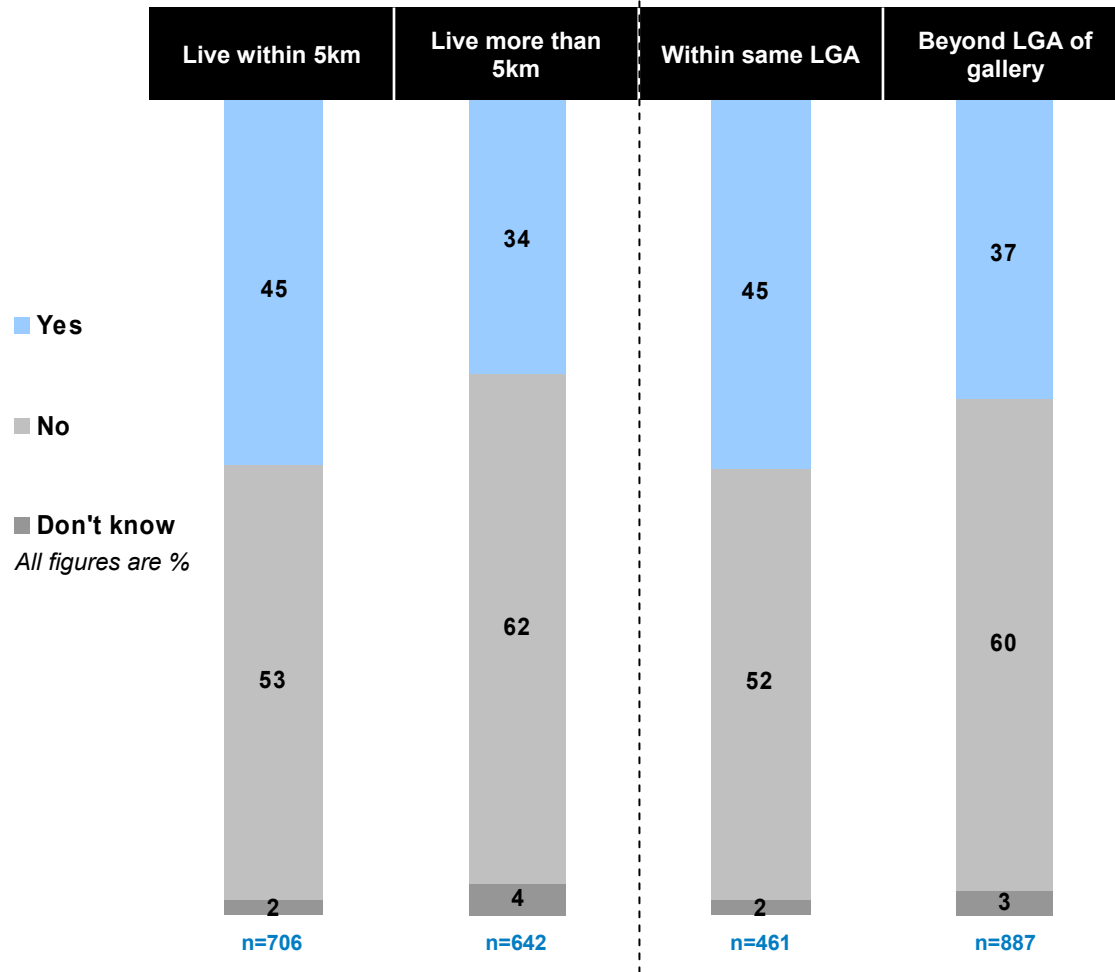
Q5. Have you or any member of your family ever been to a workshop, talk, or group activity at this gallery before today?

Base: Sydney Metro Residents, n=1348

Attendance at workshop, talk or group activity

Breakdown by Proximity and Local Government Area (LGA) status

- Those who live closer to the gallery were more likely to have attended a workshop, talk or group activity in the past



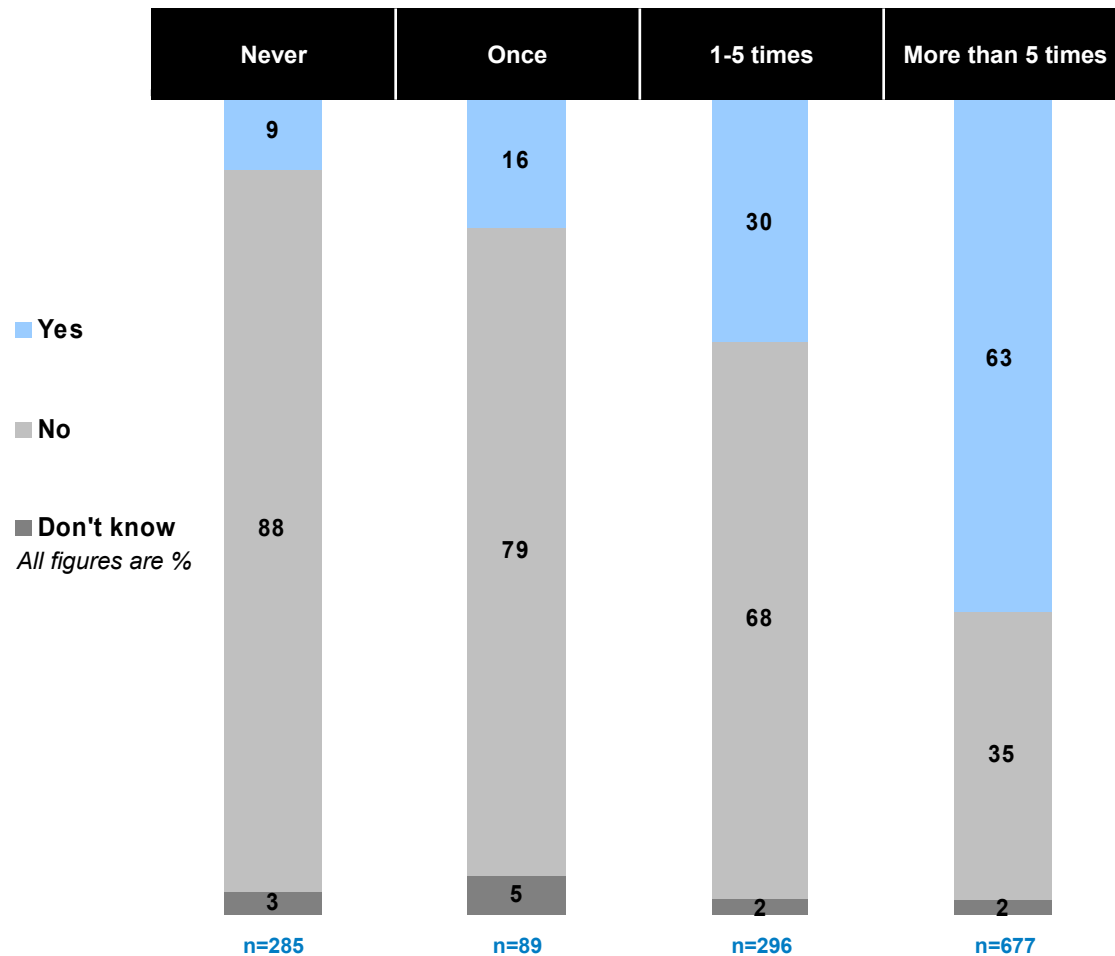
Q16. What is your residential postcode?

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

Base: Sydney Metro Residents 67

Attendance at workshop, talk or group activity

Breakdown by Number of Previous Visits



- There is a clear trend such that the more times visitors had visited the gallery, the more likely they are to have attended a workshop, talk or group activity at that gallery

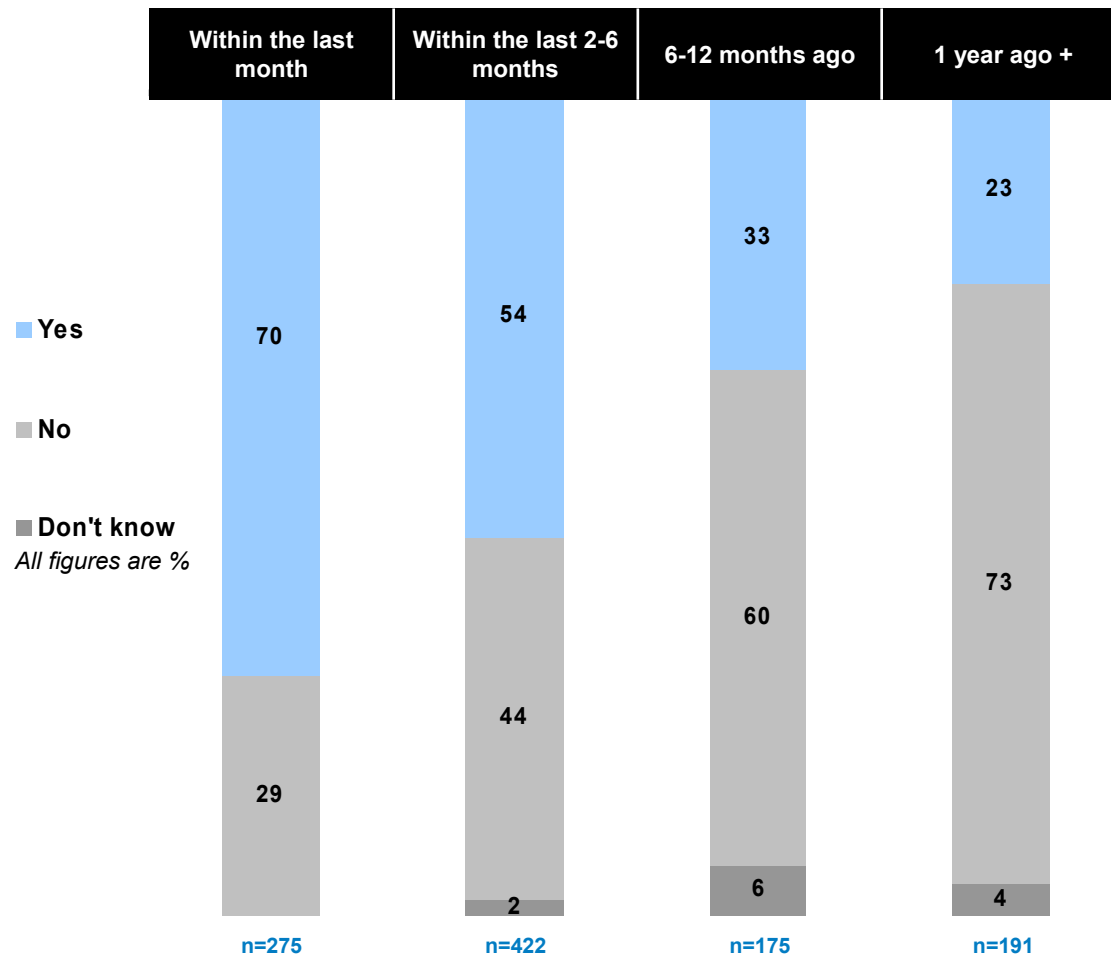
Q1. How many times have you visited this gallery before today?

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

Base: Sydney Metro Residents 68

Attendance at workshop, talk or group activity

Breakdown by Last Visit



- For repeat visitors, there is a clear correlation such that those who had visited the gallery more recently, were also more likely to have attended a workshop, talk or group activity

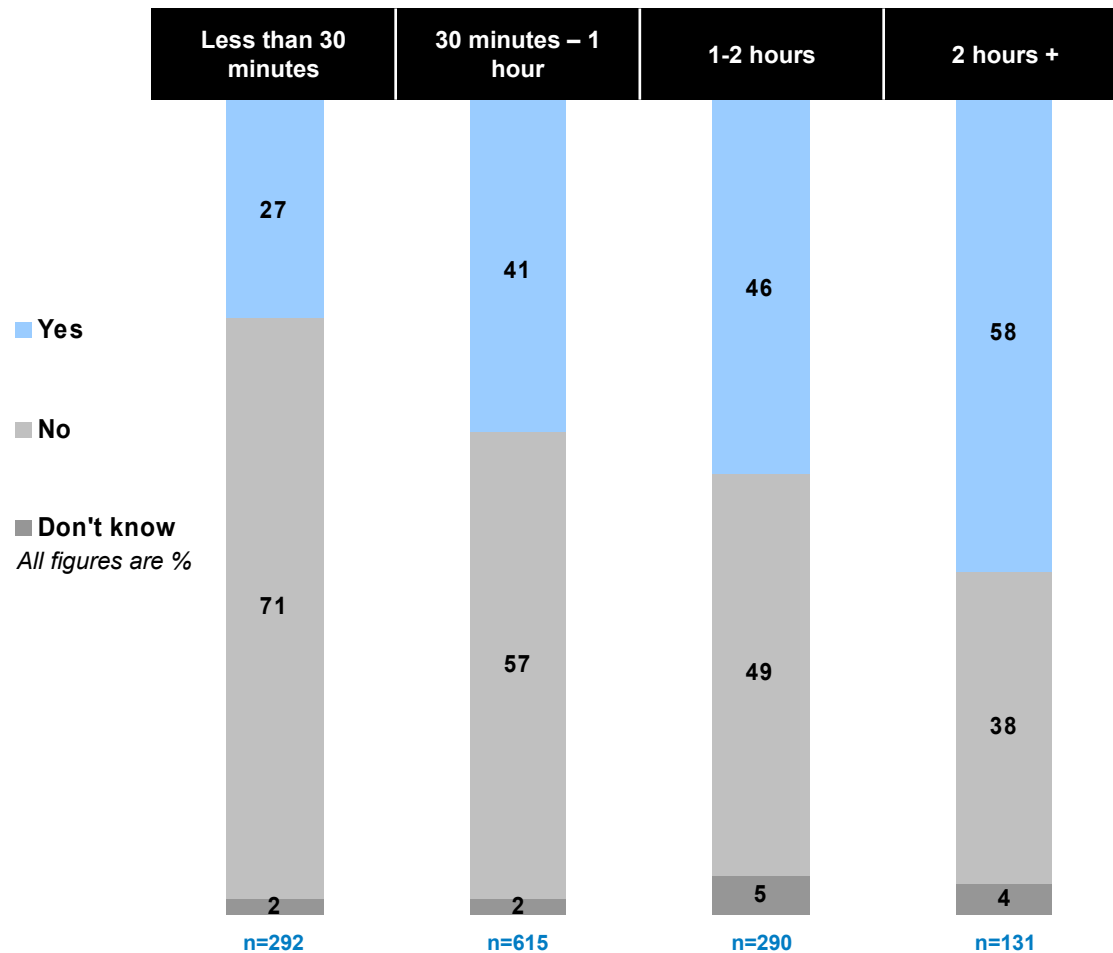
Q2. When was your last visit?

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

Base: Sydney Metro Residents 69

Attendance at workshop, talk or group activity

Breakdown by Length of Visit



- Those who stay longer are more likely to have attended a workshop, talk or group activity

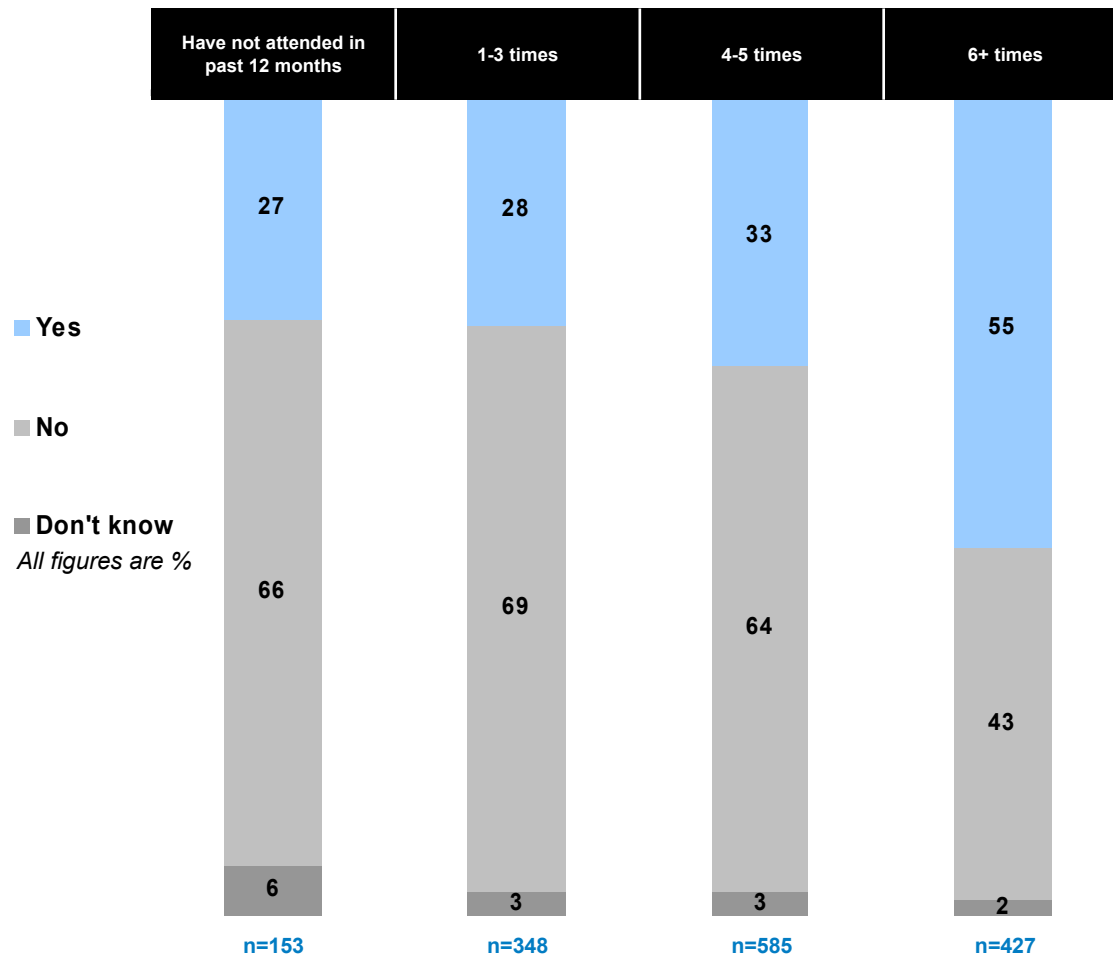
Q4. How long was your visit today?

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

Base: Sydney Metro Residents 70

Attendance at workshop, talk or group activity

Breakdown by Frequency of Visitation to Other Galleries in Metro Sydney



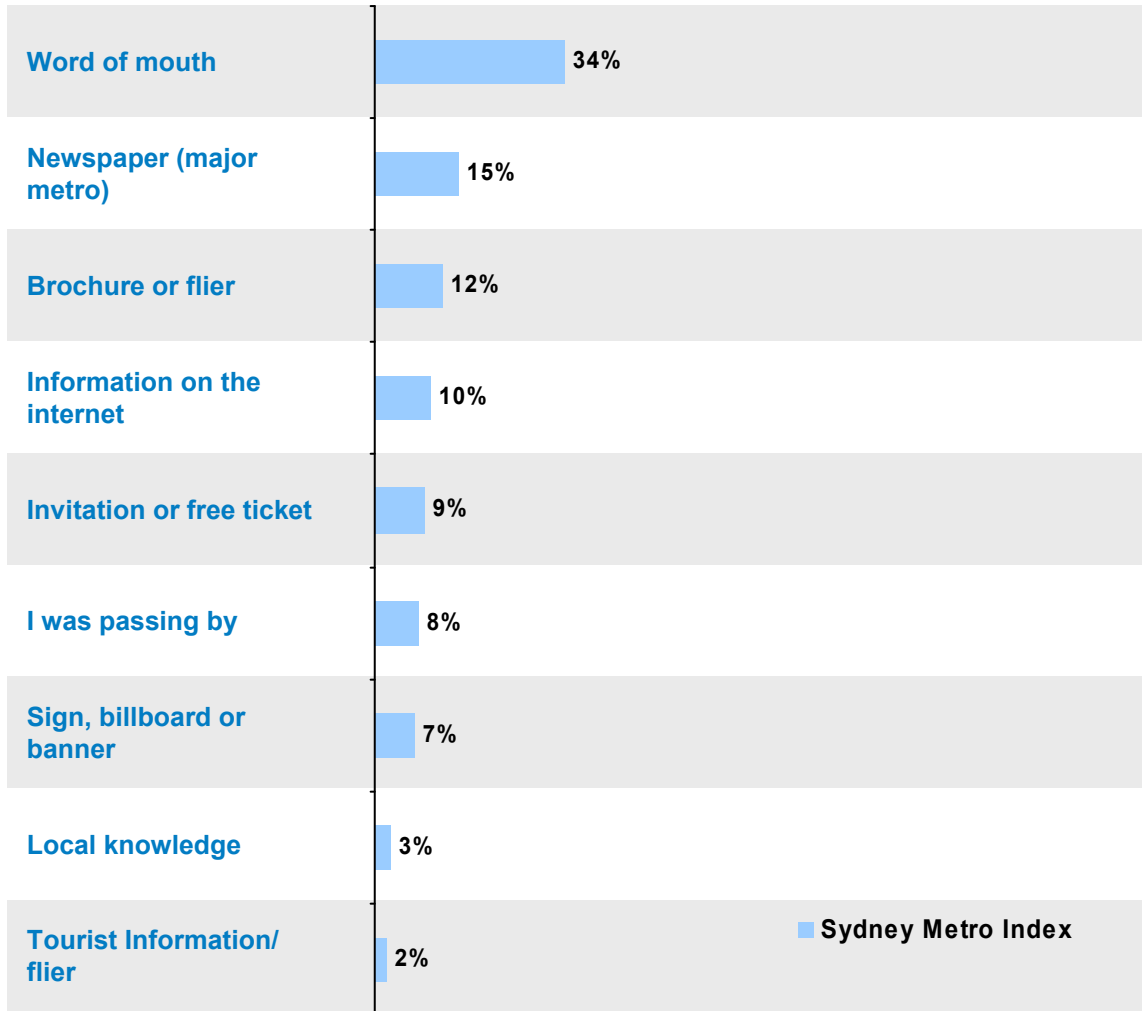
- Those who had visited other galleries in Metro Sydney more than 5 times in the last 12 month, were also more likely to have attended a workshop, talk or group activity

Q.23. Thinking about the past 12 months, how many times have you been to a Museum or Gallery in Metro Sydney?

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

Base: Sydney Metro Residents 71

Source of information



- Galleries differ widely with respect to the source of information about the galleries
- Overall word of mouth is the most commonly cited source of information about the galleries, and this is consistently the highest source of information across galleries in Metro Sydney (most are similar with some outliers at 25% and 46%)
- The role of the major metropolitan newspaper differs widely across galleries (from 3% to 45%)
- The local newspaper also differs widely across galleries (0% to 21%)

SYDNEY RESIDENT REPORT

Source of information

Breakdown by Age

	Overall Sydney Metro n=1348	15-24 n=172	25-34 n=192	35-44 n=192	45-54 n=209	55-64 n=285	65+ n=231
Word of mouth	34	49	36	29	31	34	30
Newspaper (major metropolitan)	15	12	11	13	17	23	17
Information on Internet	10	16	12	13	8	7	5
Newspaper (local/community)	8	3	2	7	9	11	18
I was passing by	8	6	15	8	10	3	6
Poster	5	8	5	6	3	2	5

- Visitors under 25 are most likely to hear about the gallery/exhibition via word of mouth
- Younger visitors are also more likely to find about the gallery/exhibition through the internet
- Older visitors, especially those over 65, are most likely to hear about the gallery through the local/community newspaper
- Young adults (25-34) are the most likely to hear about the gallery/exhibition by just “passing by”

Q26. Which of the following age groups are you in?

Q6. How did you hear about the gallery or this exhibition?

SYDNEY RESIDENT REPORT

Source of information

Breakdown by Work Status

	Overall Sydney Metro n=1348	Full time work n=418	Part time work n=194	Retired n=277	Student n=146	Home duties n=71	Self employed n=128
Word of mouth	34	30	36	30	51	30	39
Newspaper (major metropolitan)	15	18	11	21	14	15	11
Information on Internet	10	10	9	4	20	6	14
By invitation or free ticket	9	11	8	6	6	4	10
Newspaper (local/community)	8	4	9	16	3	8	9
I was passing by	8	11	7	5	6	2	10

- Students were more likely to have heard about the gallery/exhibition through word or mouth or the internet
- Workers, overall, were more likely to find out about the gallery/exhibition by just “passing by”
- Retirees are much more likely to find out about the gallery/exhibition through the newspaper

Q6. How did you hear about the gallery or this exhibition?

Q24. What is your MAIN occupation?

SYDNEY RESIDENT REPORT

Source of information

Breakdown by Number of Previous Visits

	Overall Sydney Metro n=1348	First time n=285	Been Once Before n=89	Been 1-5 times n=296	Been more than 5 times n=677
Word of Mouth	34	34	39	37	32
Newspaper (major metropolitan)	15	10	19	15	18
Brochure or flier	12	6	4	12	17
Information on Internet	10	7	4	8	13
By invitation or free ticket	9	4	4	9	11
Newspaper (local/community)	8	4	5	10	10
I was passing by	8	17	9	6	4
Sign/billboard/ banner	7	13	2	8	5

- First time visitors were much more likely to hear about the gallery/exhibition by just “passing by” or from a sign, billboard or banner
- Those who had been before, were more likely to hear about the gallery through the newspaper
- Those who had visited the gallery more than 5 times, were most likely to find out the gallery/exhibition online

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

Q6. How did you hear about the gallery or this exhibition?

Source of information

Breakdown by Residential Postcode

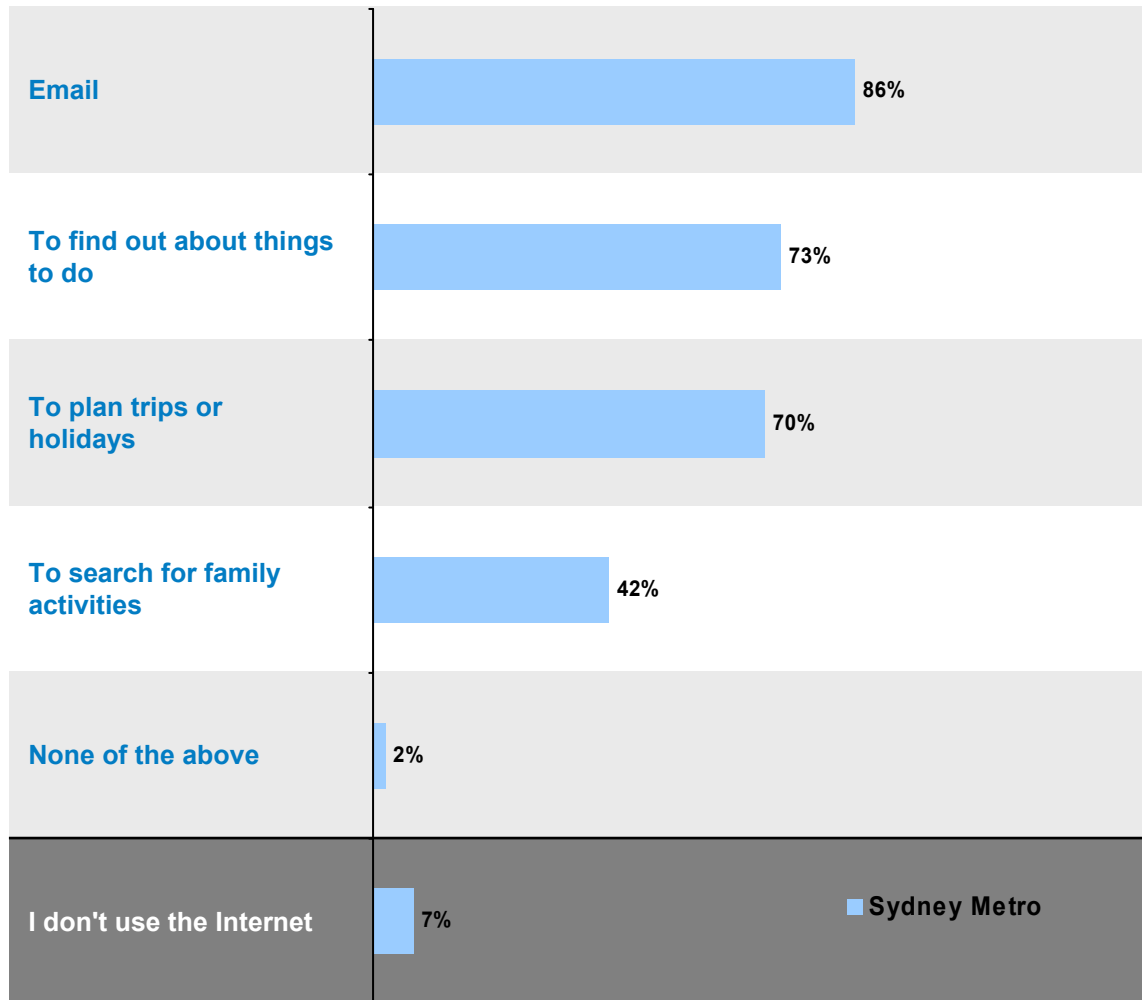
	Overall Sydney Metro n=1348	Eastern Suburbs n=226	Northern Suburbs n=389	North Western Suburbs n=107	South Western Suburbs n=84	Southern Suburbs n=504
Information on Internet	10	9	9	17	5	10
Newspaper (local/community)	8	1	16	1	2	9
I was passing by	8	15	3	6	12	8

- Visitors from the North Western suburbs of the Sydney Metro region are most likely to hear about the gallery through the internet
- Visitors from the Eastern suburbs are most likely to stop into the gallery because they were just “passing by”
- Visitors from the Northern suburbs are much more likely to know about the gallery from their local newspaper

Q16. What is your residential postcode?

Q6. How did you hear about the gallery or this exhibition?

Internet usage



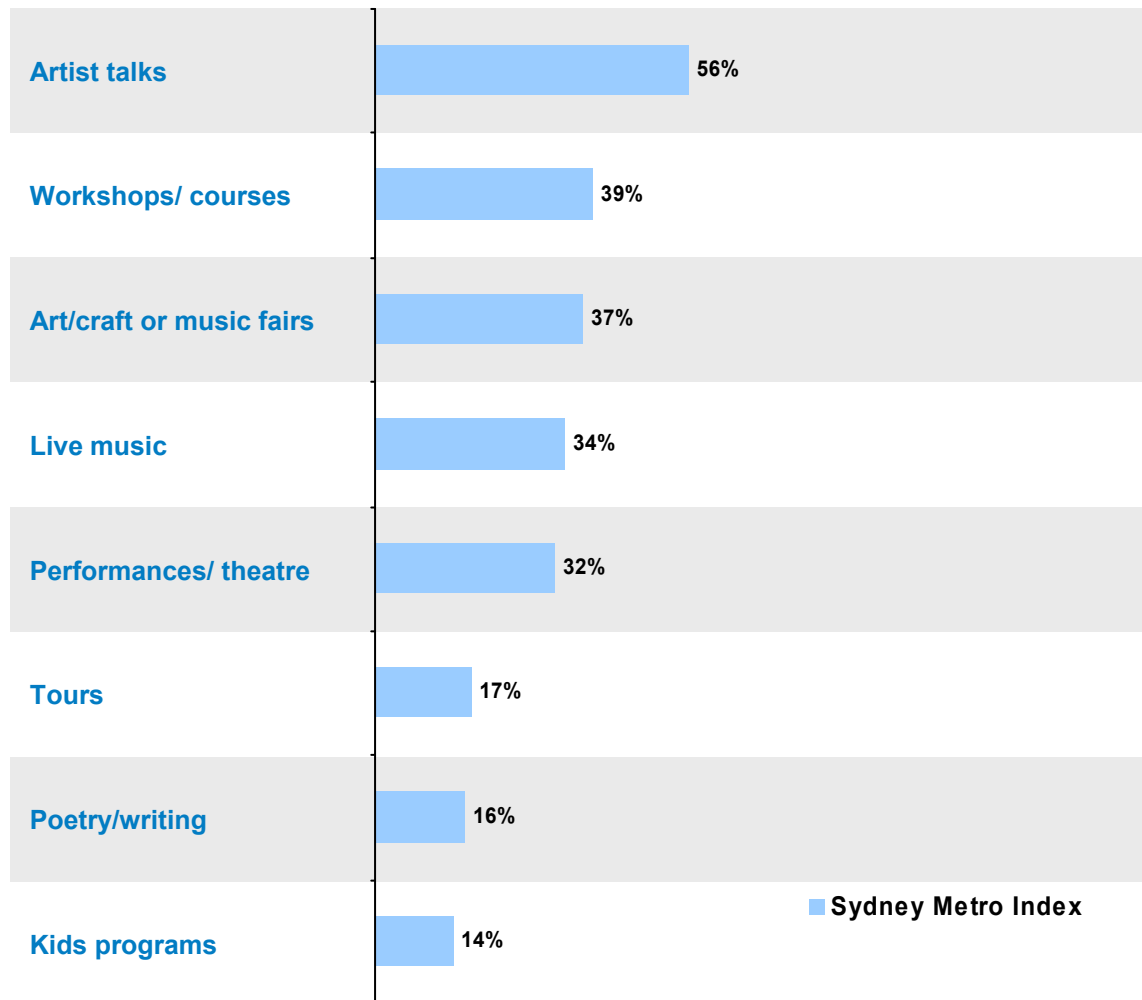
- The vast majority of visitors are using the internet in some capacity, with around three-quarters using it to find about things to do

Note: 2% of respondents chose not to answer this question

Q19. Do you use the internet for...?

Base: Sydney Metro Residents, n=1348 77

Preferred workshops and programs



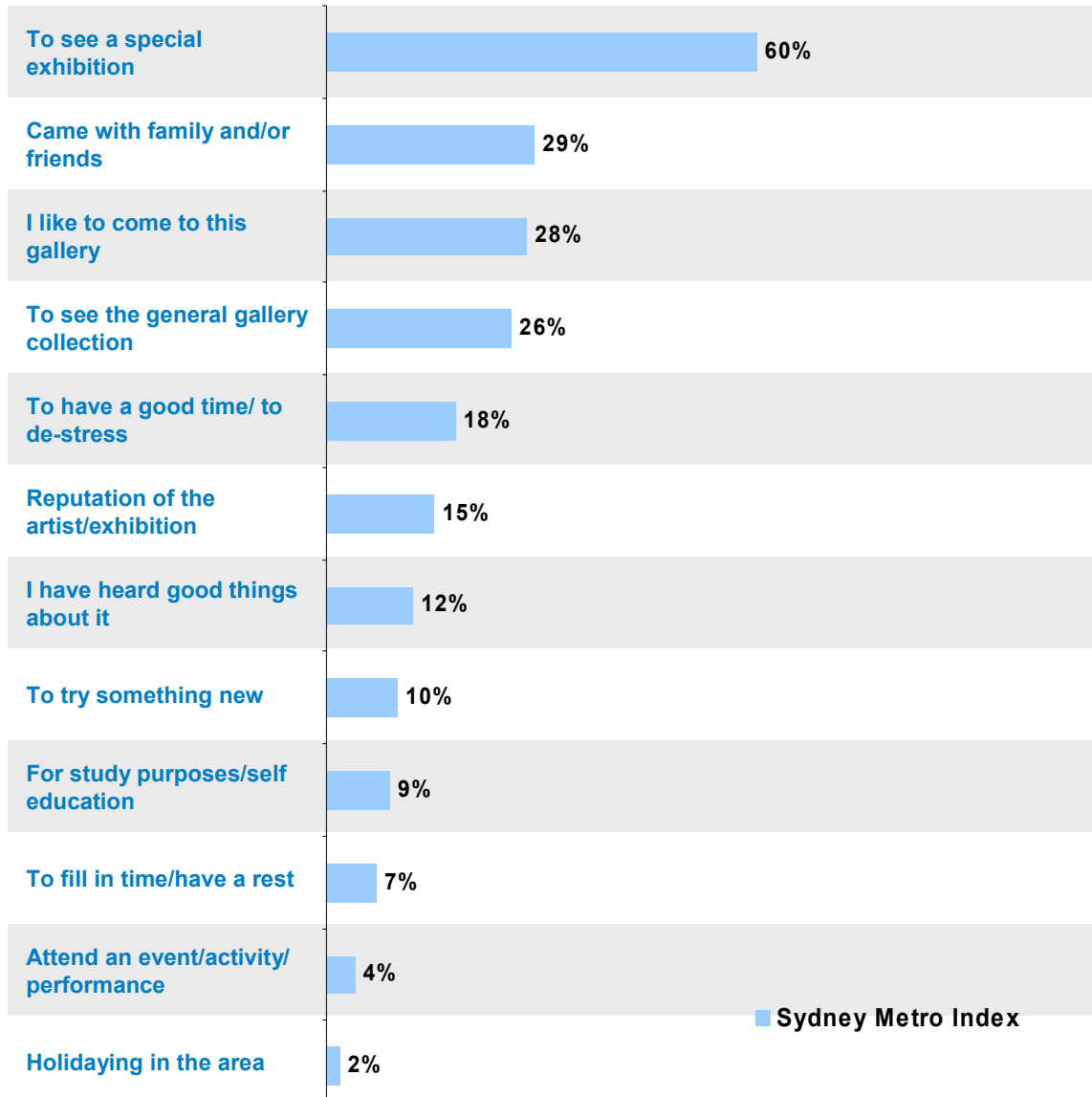
- Artist talks were the most preferred program overall (but this can vary between galleries from 34% to 72%)

Note: 10% of respondents chose not to answer this question

Q7. What programs and workshops would you or your family like to attend here?

Base: Sydney Metro Residents, n=1348 78

Motivations



- Overall, seeing a special exhibition was the strongest motivation to come to the gallery (about 3 in 5)
- However this can vary widely across galleries from (26% to 94%). This variation is due to the fact that some galleries may or may not offer either a general collection or special exhibition

Q8. What were the three main reasons you came to the gallery or exhibition today?

Base: Sydney Metro Residents, n=1348 79

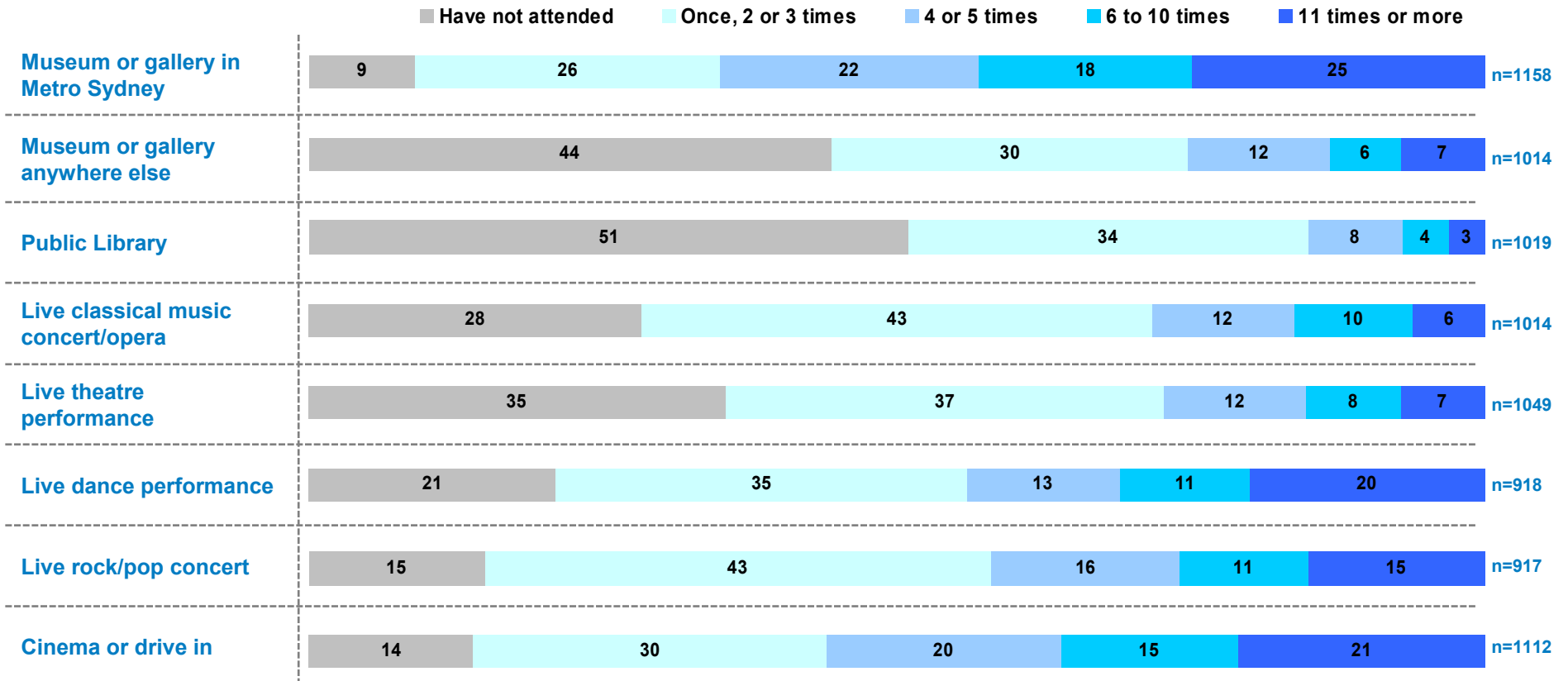
Preferred exhibitions

Painting	72%
Photography	65%
Celebrated works of art by well-known Australian artists	58%
Exhibitions of work by local artists	58%
Sculpture	57%
Drawing	55%
Contemporary art	52%
Celebrated works of art by well-known international artists	51%
Ceramics/glass	42%
Textiles	39%
Printmaking	39%
Live theatre/dance/music performance	37%
Social history exhibitions	35%
Indigenous and/or Torres Strait Islander exhibitions	31%
Digital media arts/interactive media	30%

- Overall, as a Metro Sydney average, painting was most commonly nominated as a preferred exhibition type, but certain galleries show very different preferences of exhibition types

SYDNEY RESIDENT REPORT

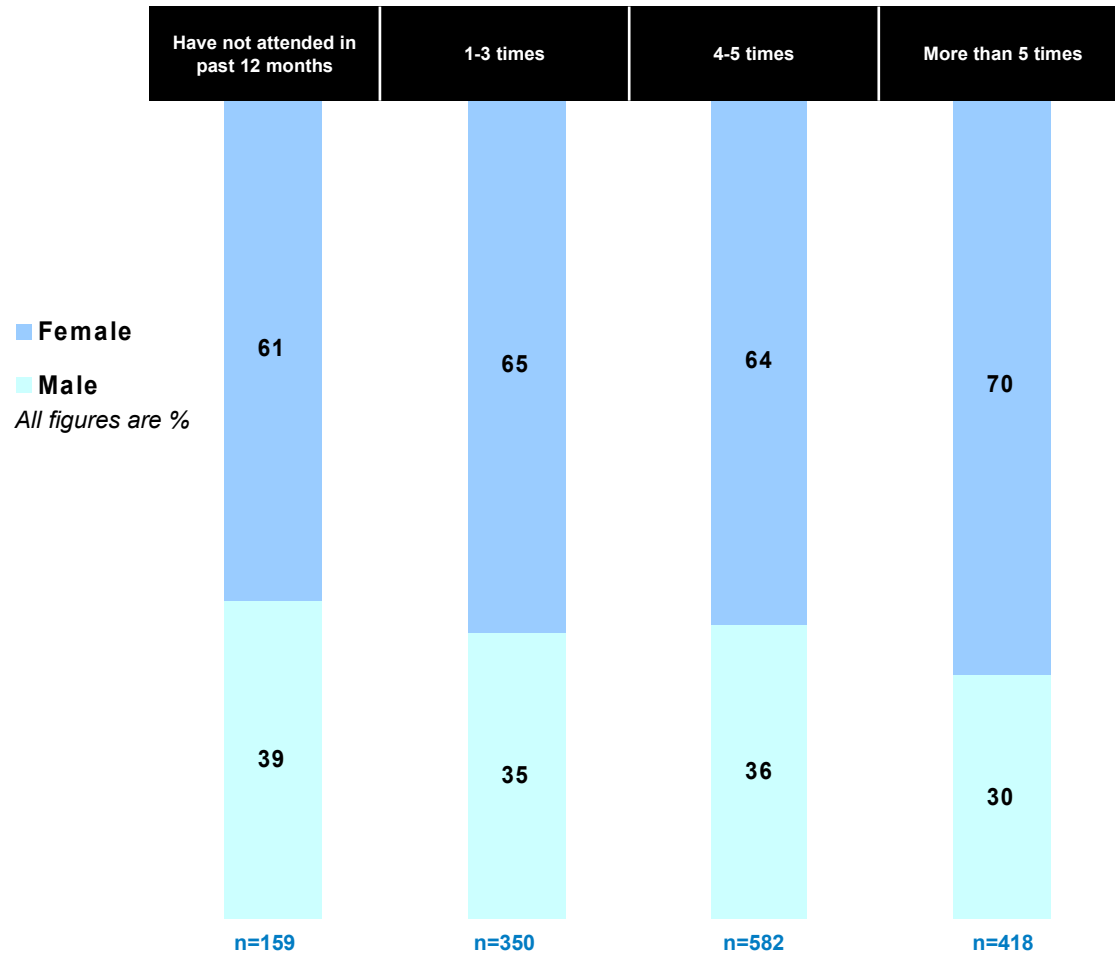
Attendance at other events



- Of all the cultural events, gallery visitors showed the highest and most frequent attendance at other galleries in Metro Sydney
- Attendance at the cinema, concerts and dance performances were the next most common cultural activities amongst gallery visitors on average

Gender

Breakdown by Number of times visited OTHER gallery in Metro Sydney



- Those who have visited more galleries in Metro Sydney in the last 12 months, are slightly more likely to be female

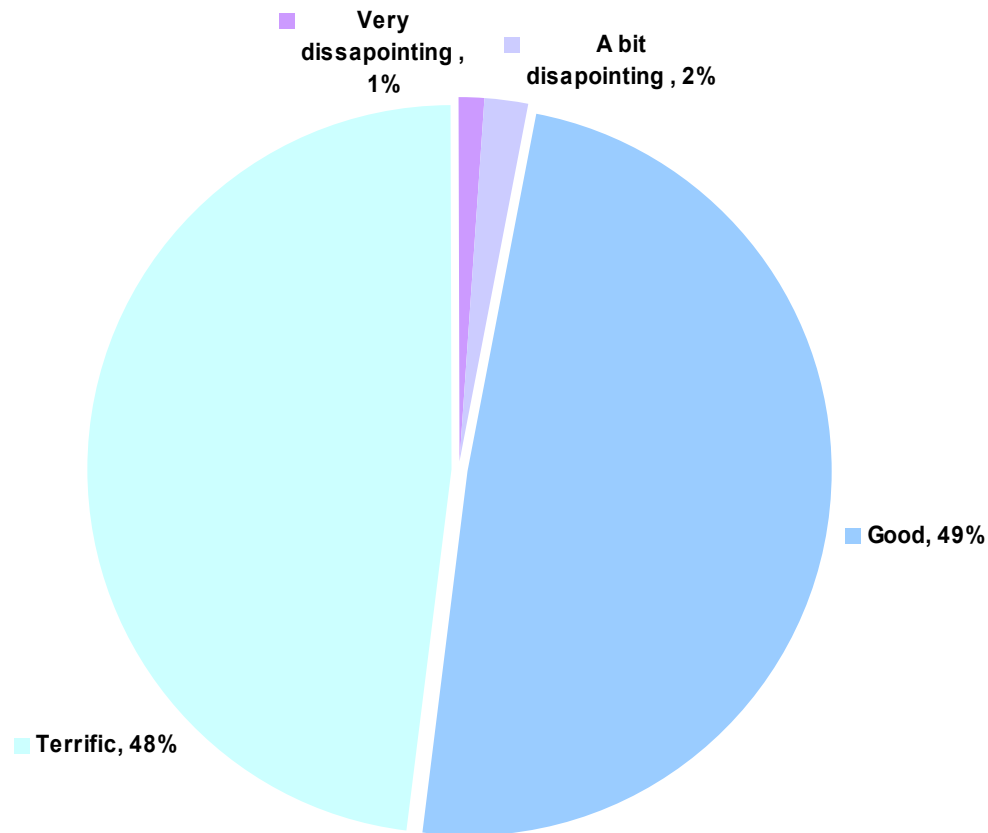
M&G NSW

Satisfaction & Feedback



IMAGE © Ella Condon Installation view of *Heresies* at the ACP 2008

Overall satisfaction

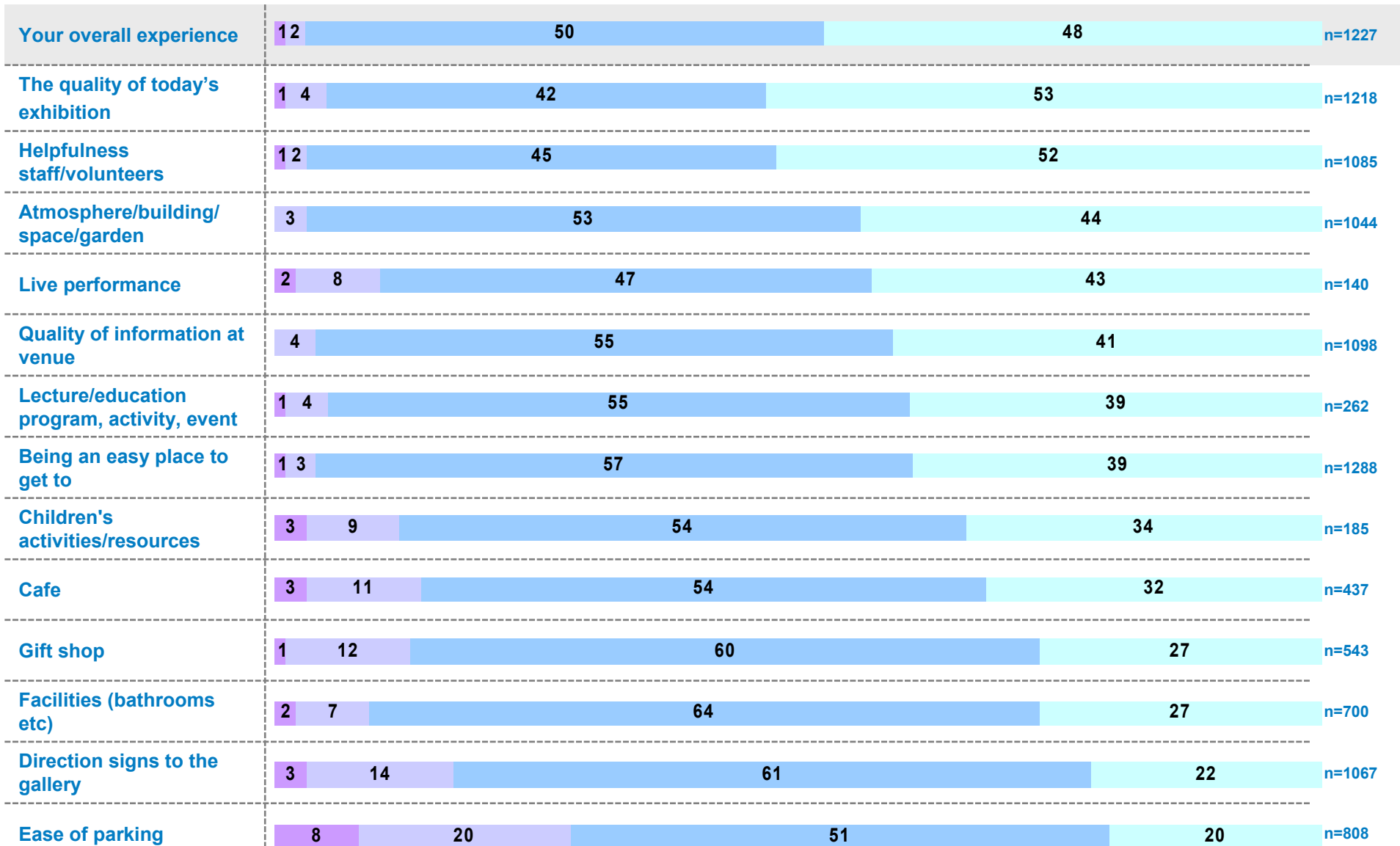


- Overall most visitors (97%) are satisfied with their visit to their gallery, rating it as “good” or “terrific”

SYDNEY RESIDENT REPORT

Satisfaction with the different elements

Very disappointing A bit disappointing Good Terrific



Q9. How would you rate ALL of the following in your visit today?

Base: Sydney Metro Residents 85

Relevancy of satisfaction criteria

% of respondents providing a rating for each aspect

Being an easy place to get to	97%
The quality of today's exhibitions	92%
Quality of information at venue	83%
Helpfulness of staff/volunteers	82%
Direction signs to the gallery	80%
Atmosphere/building/space/garden	79%
Ease of parking	60%
Facilities (bathrooms etc)	51%
Gift shop	39%
Cafe	29%
Lecture/education, program, activity, event	21%
Children's activities/resources	14%
Live performance	12%

- The data shows the proportion of the total survey base who rated each of the satisfaction criteria (Q9)
- From this, we can infer that “Live performance” is not attended by most visitors on average at galleries across Metro Sydney (around 88% since only 12% are responding to this question)

Q9. How would you rate ALL of the following in your visit today?

Base: Sydney Metropolitan Residents 86

Tourist Report



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M&G NSW

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Note about Tourists

The Tourist segments differ greatly between galleries across Sydney Metro

- Unlike regional areas, several galleries in Sydney Metro have a high proportion of “Tourists” (defined here as people who live outside of Sydney)
- Grouping gallery audiences is problematic in Sydney Metro because behaviour and attitudes vary significantly by tourist type
- In this survey, some galleries in Sydney Metro have low tourist bases, whereas others have large tourist populations
- The main Sydney Metro report excluded Tourists to focus on the population of Sydney Metro residents
- This report looks at the differences between Sydney residents and tourists
- Tourists are classified as NSW, interstate and international

Tourists and Weighting

Sydney Residents are weighted proportionally to their gallery's contribution to the tourist base

- In this supplementary report, Sydney Residents are compared to tourists (either NSW, interstate or international). This is unlike the main Sydney Metro Report which looks at Sydney Metro Residents only
- For the Sydney resident figures, the data for each gallery is weighted to reflect the contribution that particular gallery makes to the total pool of tourists
- In other words, the Sydney resident figures in this report are derived to a greater extent from galleries with a higher tourist base
- On the other hand, galleries with a low tourist population are not well represented in the Sydney resident statistic in this report
- Therefore, the statistics for Sydney Residents in this report will NOT match the Sydney Metro Index statistics, as the latter is a standardised index comprised of an equal contribution from all galleries for Sydney residents
- The tourist types (NSW, interstate and international) remain unweighted in this report

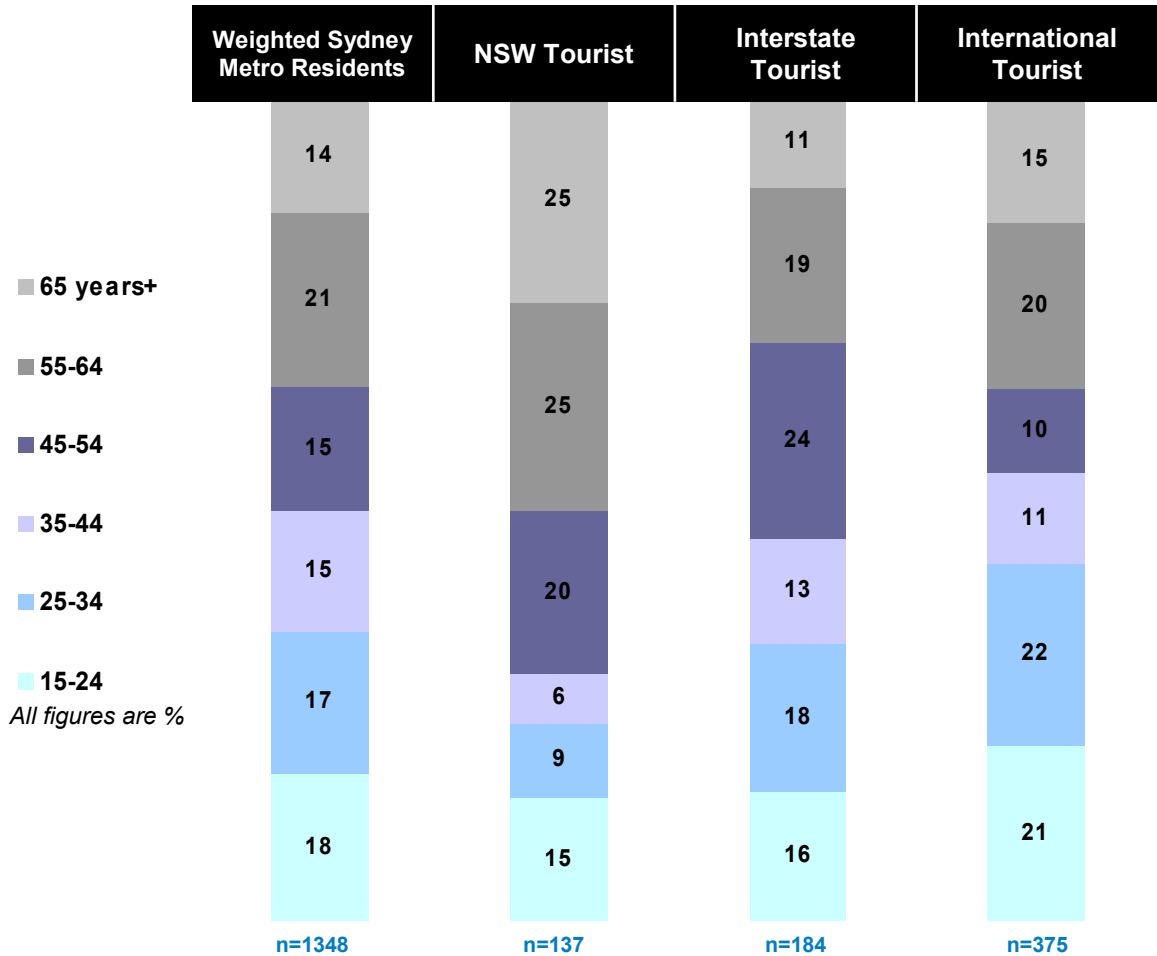
International origins

- Over half of international visitors to the Sydney Metro galleries are from The United Kingdom (UK) or Europe
- The UK represents the highest proportion of tourists with nearly 1 in 3
- However, the survey for this study was only available in English, hence non-English speaking international visitors may have been less likely to participate
- Therefore it is likely that non-English speaking countries may be under-represented in this report for international visitors
- Note: countries representing under 2% are not shown

UK	33%
Europe (excl. UK)	25%
USA	13%
NZ	7%
Canada	7%
Germany	6%
South Korea	4%
Sweden	4%
France	4%
Switzerland	3%
Netherlands	2%
China	2%
Italy	2%

Age

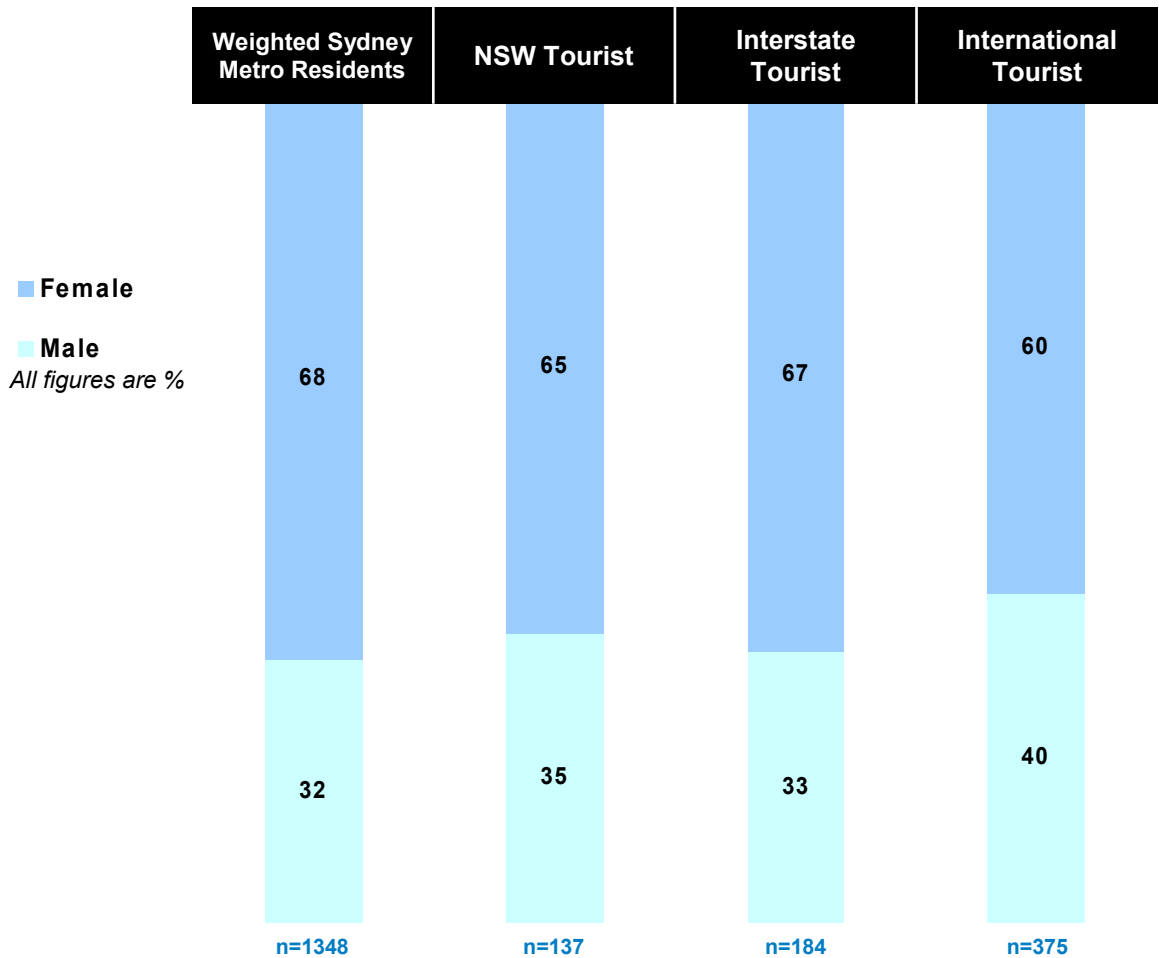
- NSW tourists are slightly older than Sydney residents and interstate or international tourists
- Interstate tourists were more likely to be between the ages of 35-54 compared to international tourists
- One likely reason for this is that interstate tourists come with their family, whereas international visitors are more likely to be couples without children



Gender

Comparisons to Sydney Region

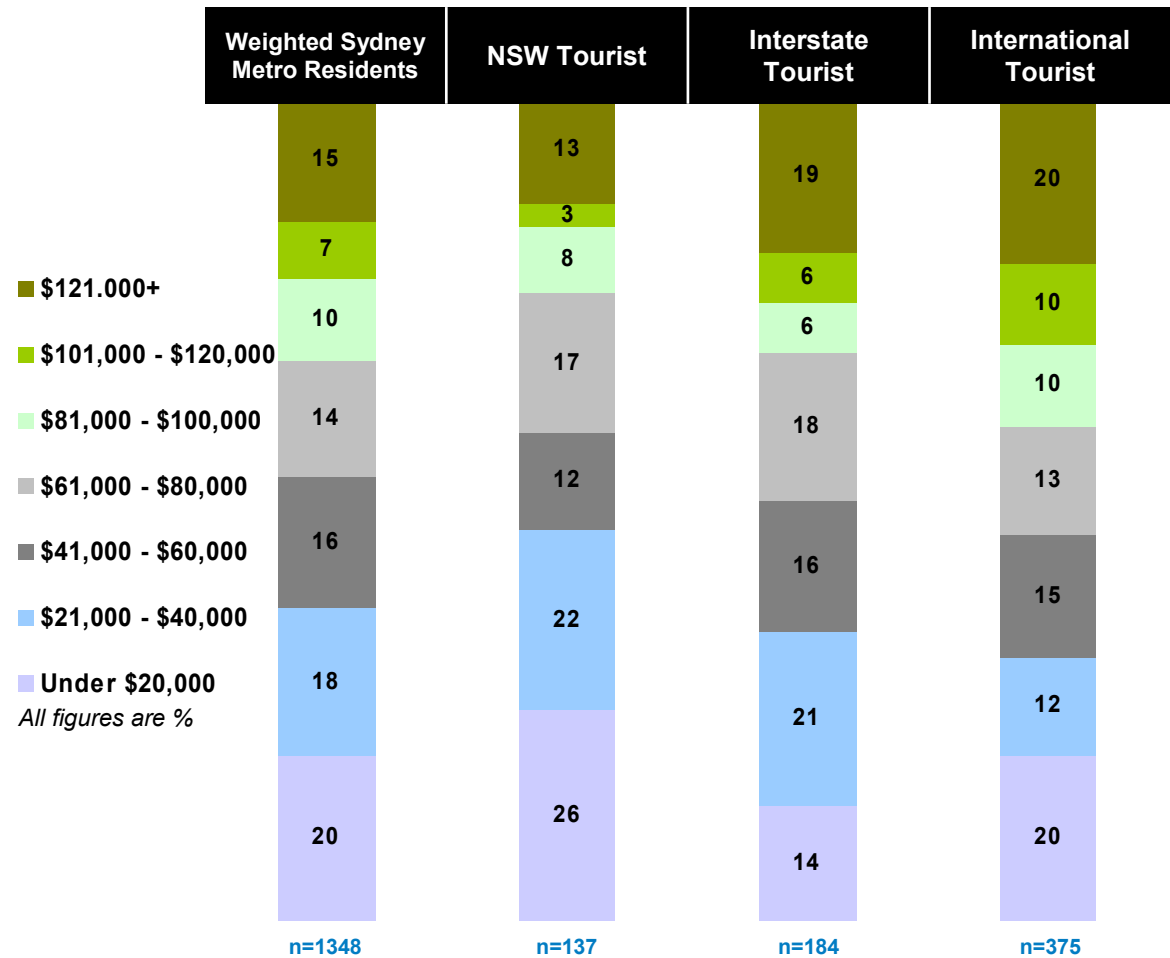
- International tourists have the most even gender split, but this is only slightly higher compared to other groups
- Females are still in the majority across tourist types



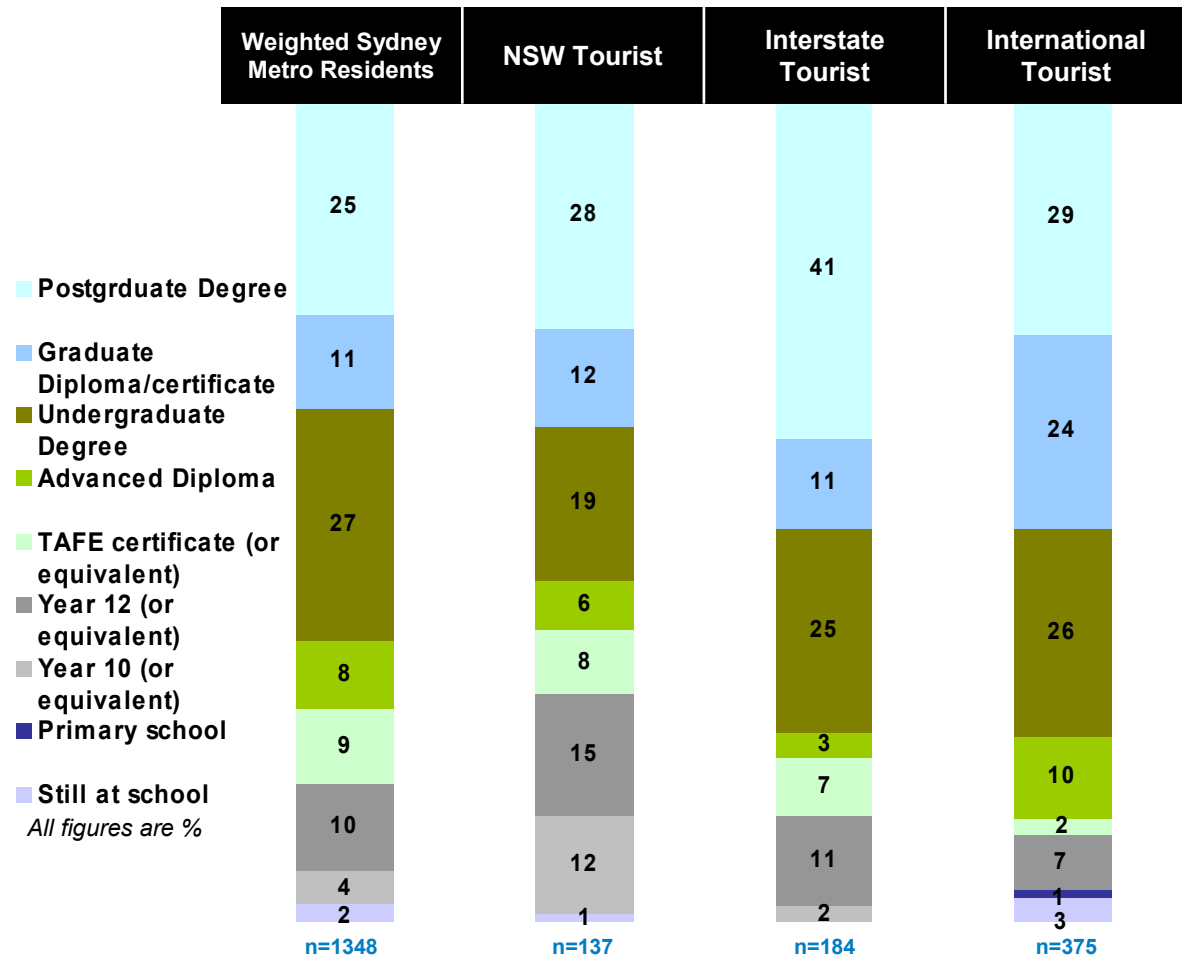
Income

Comparisons to Sydney Region

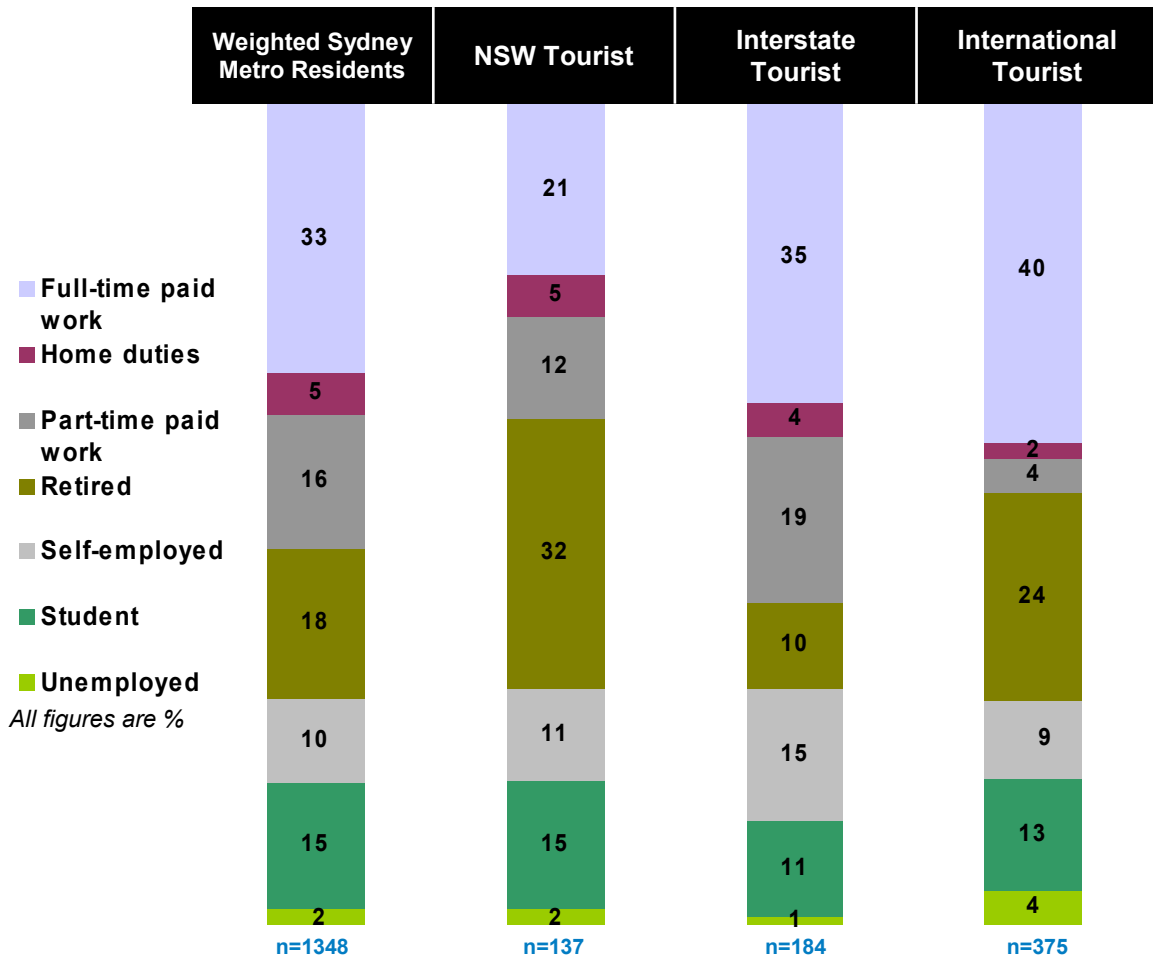
- NSW tourists had slightly lower household incomes compared to the other tourist types and Sydney residents



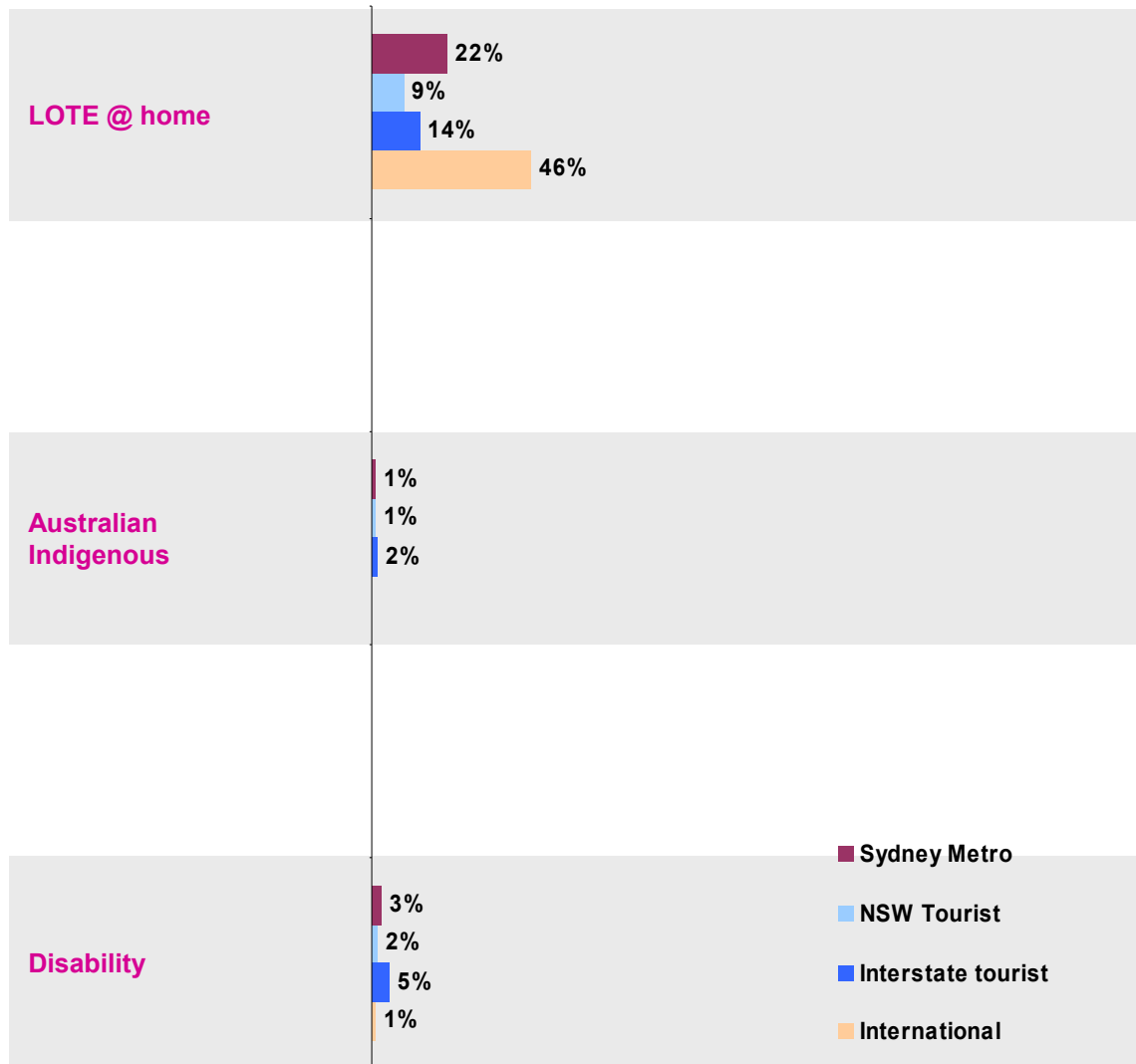
- Interstate tourists are most likely to have a postgraduate degree
- NSW tourists are more likely to have a high-school only education



- NSW tourists are most likely to be retirees, followed by international tourists
- International tourists are the most likely to be in full-time work



Diversity



- International tourists, as would be expected, are far more likely to speak a language other than English at home, with nearly half reporting to do so
- Interstate tourists are less likely to speak a LOTE at home compared to Sydney residents
- Note: The actual proportion of LOTE visitors may indeed be higher given the questionnaire was only available in English

Q14. Do you speak a language other than English at home?

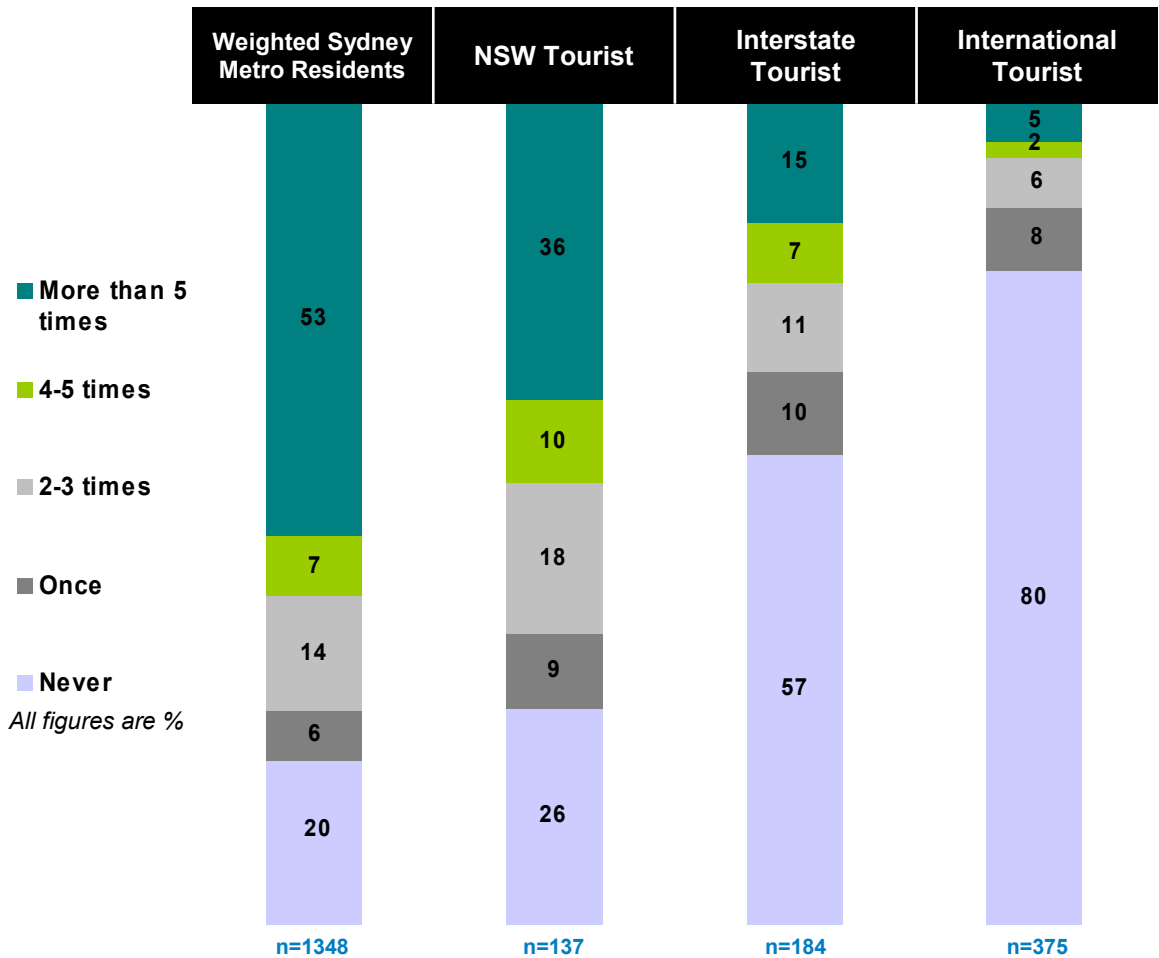
Q13. Are you of Aboriginal or Torres Strait Islander decent?

Q25. Do you have a disability or other condition that impacted on your visit today?

Number of times visited

Comparisons to Sydney Region

- International tourists are the most likely to be first time visitors to the gallery
- There is a clear trend here, such that tourists who live further away from the gallery are more likely to be first time visitors
- The reverse is true for those who visit more than 5 times, with Sydney residents much more likely than the tourist groups to have visited more than 5 times

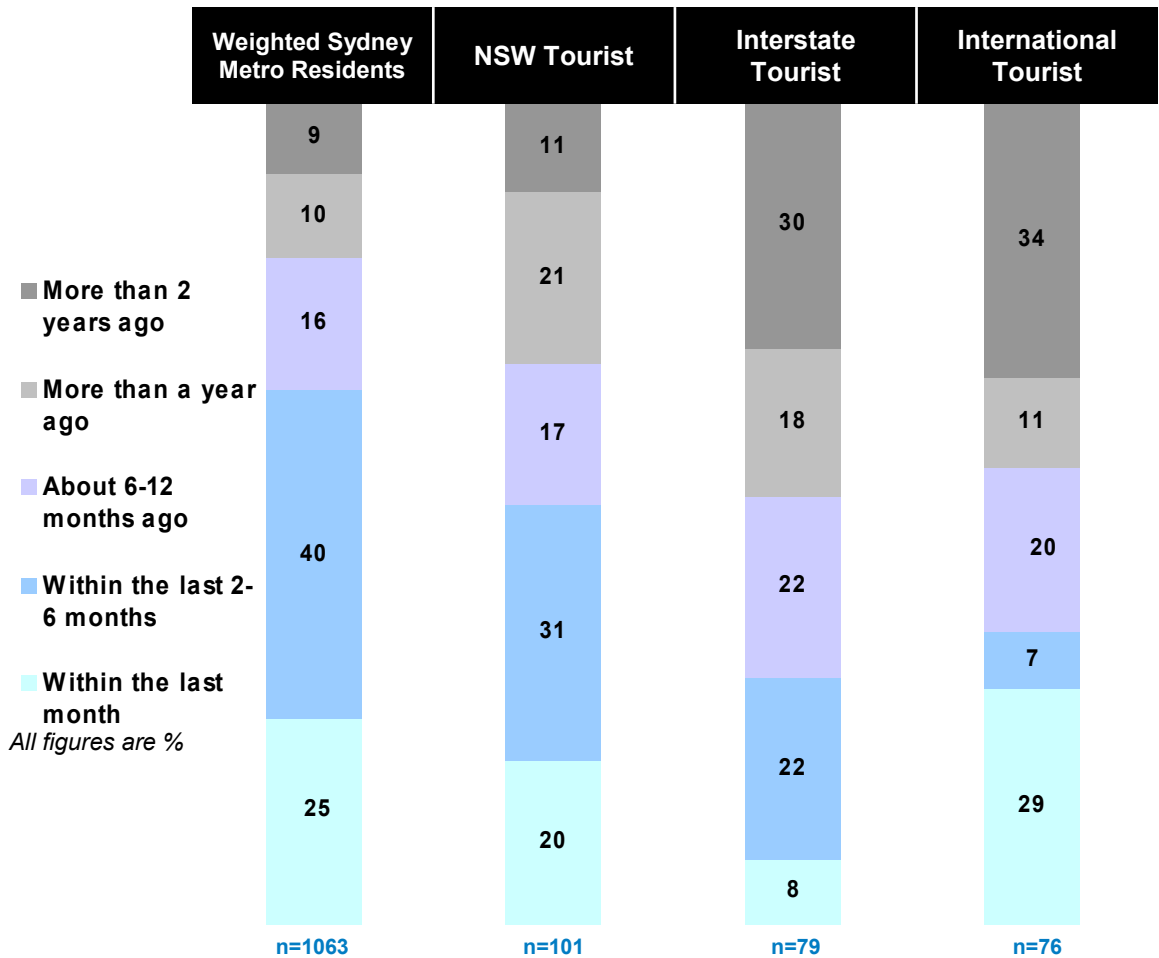


TOURIST REPORT

When last visited

Comparisons to Sydney Region

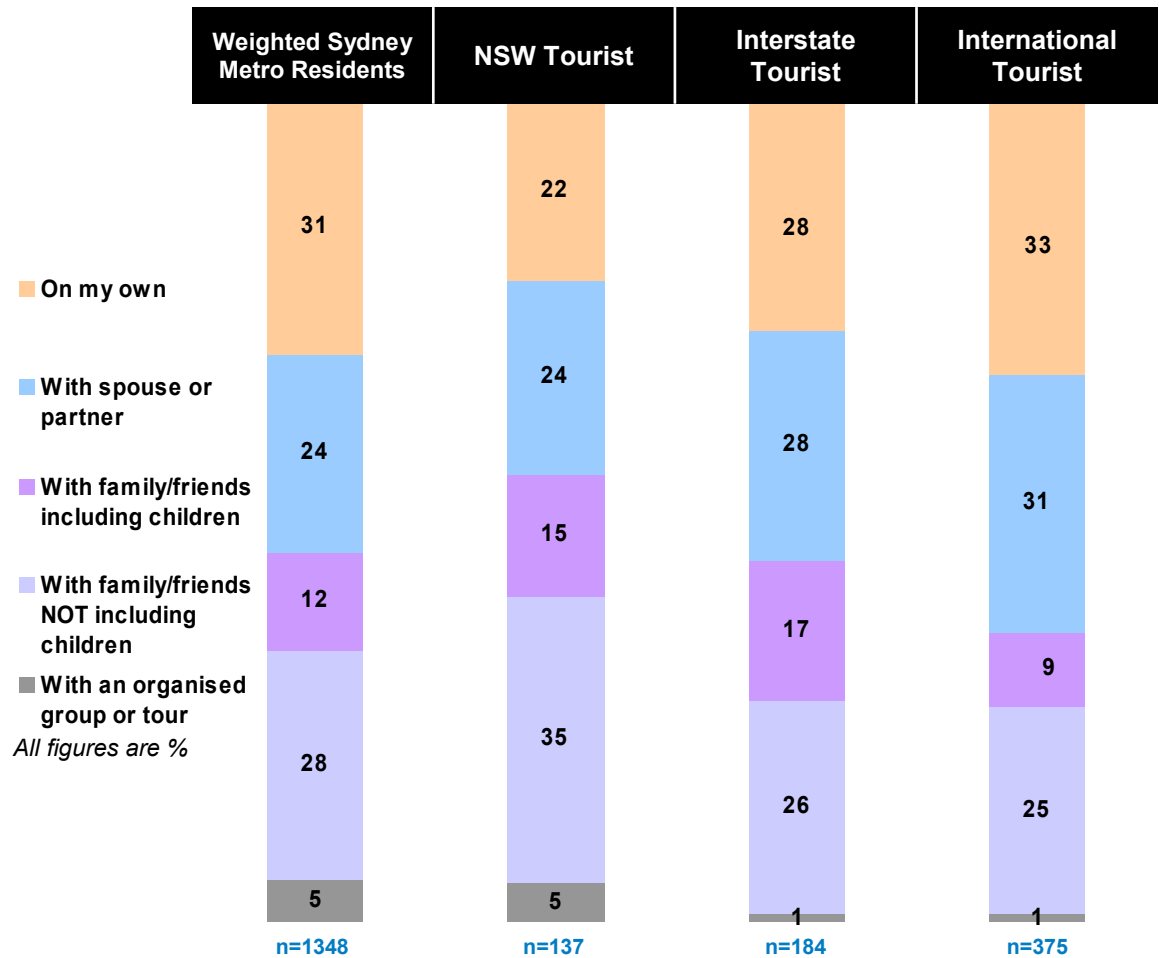
- Of those who had visited before, international tourists are most likely of any tourist group to have visited within the last month



Who visited with

Comparisons to Sydney Region

- NSW tourists were slightly less likely to visit on their own

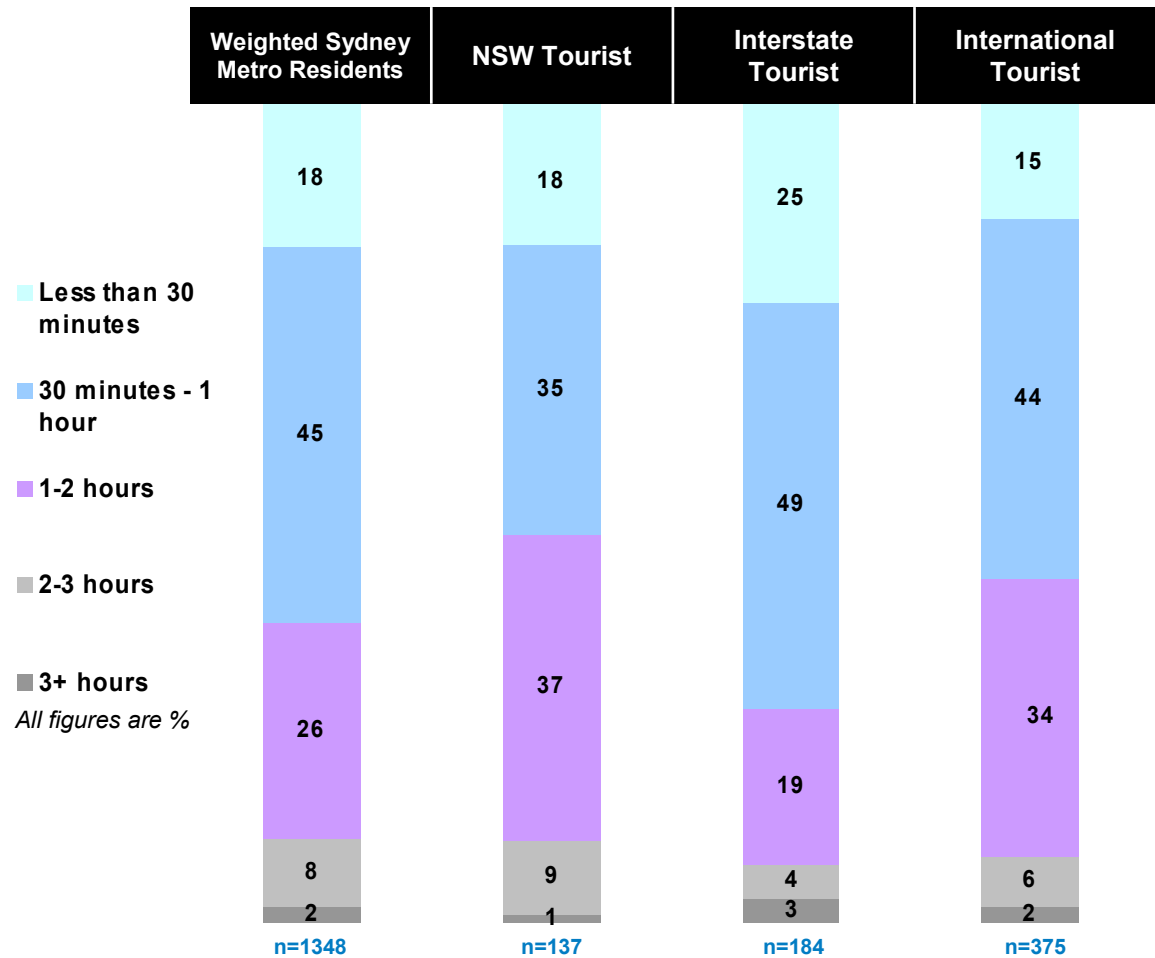


TOURIST REPORT

Length of visit

Comparisons to Sydney Region

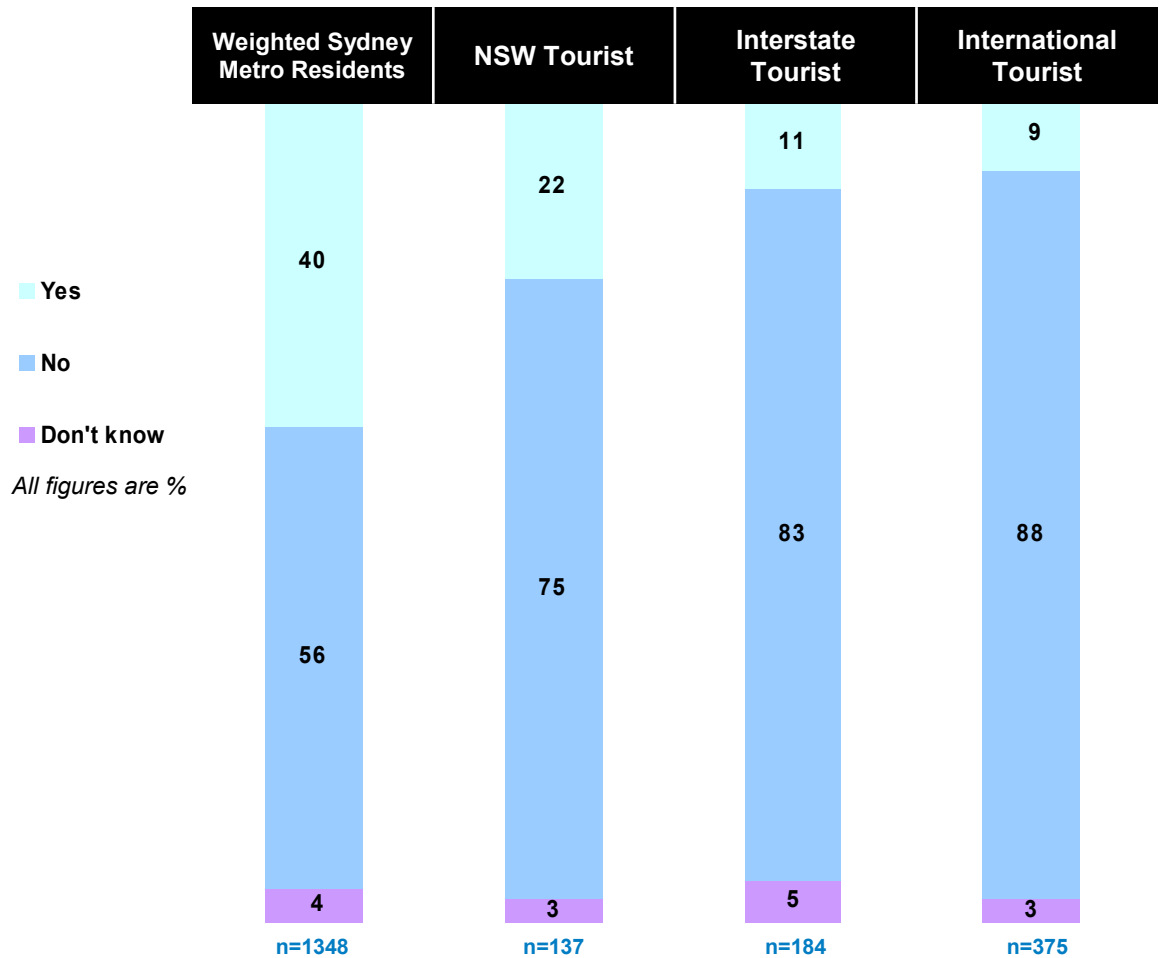
- Interstate tourists are making the shortest visits to the gallery



Attendance at workshop, talk or group activity

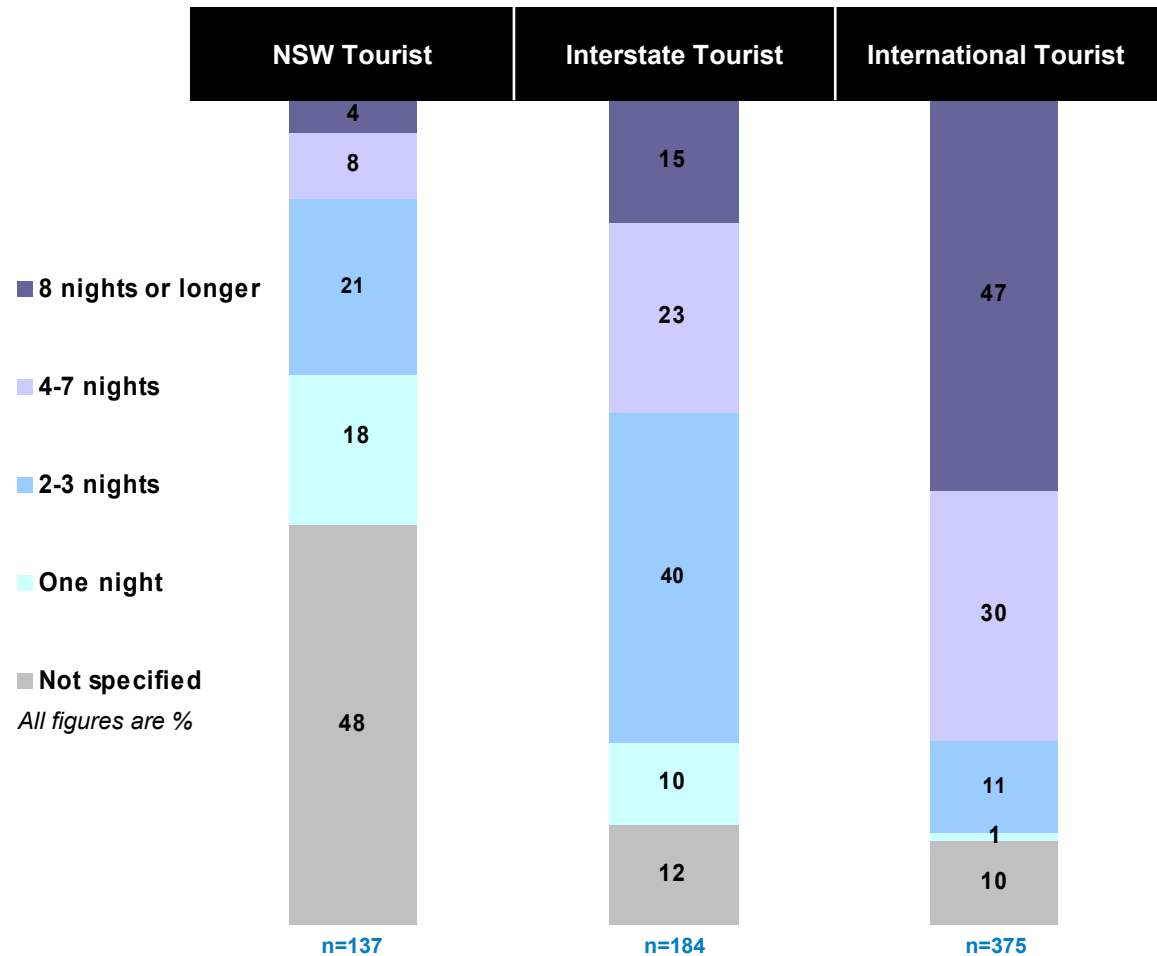
Comparisons to Sydney Region

- The further tourists live away from Sydney, the less likely they are to have attended a workshop, talk or group activity



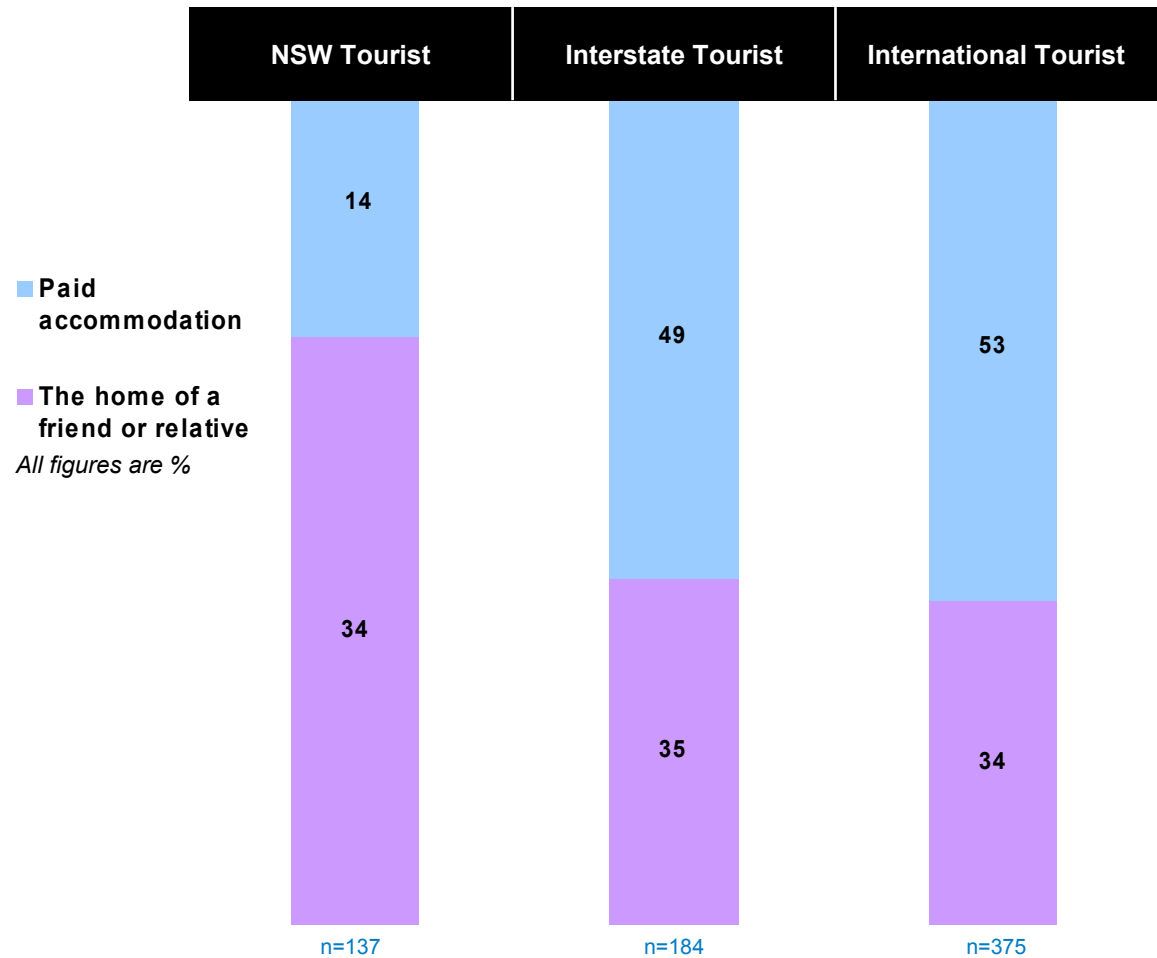
Length of time staying in Sydney

- International tourists are spending the longest period of time in Sydney, with nearly a half spending more than a week
- Nearly a half of NSW tourists did not provide an answer to this question, implying that many are making a day-trip to Sydney



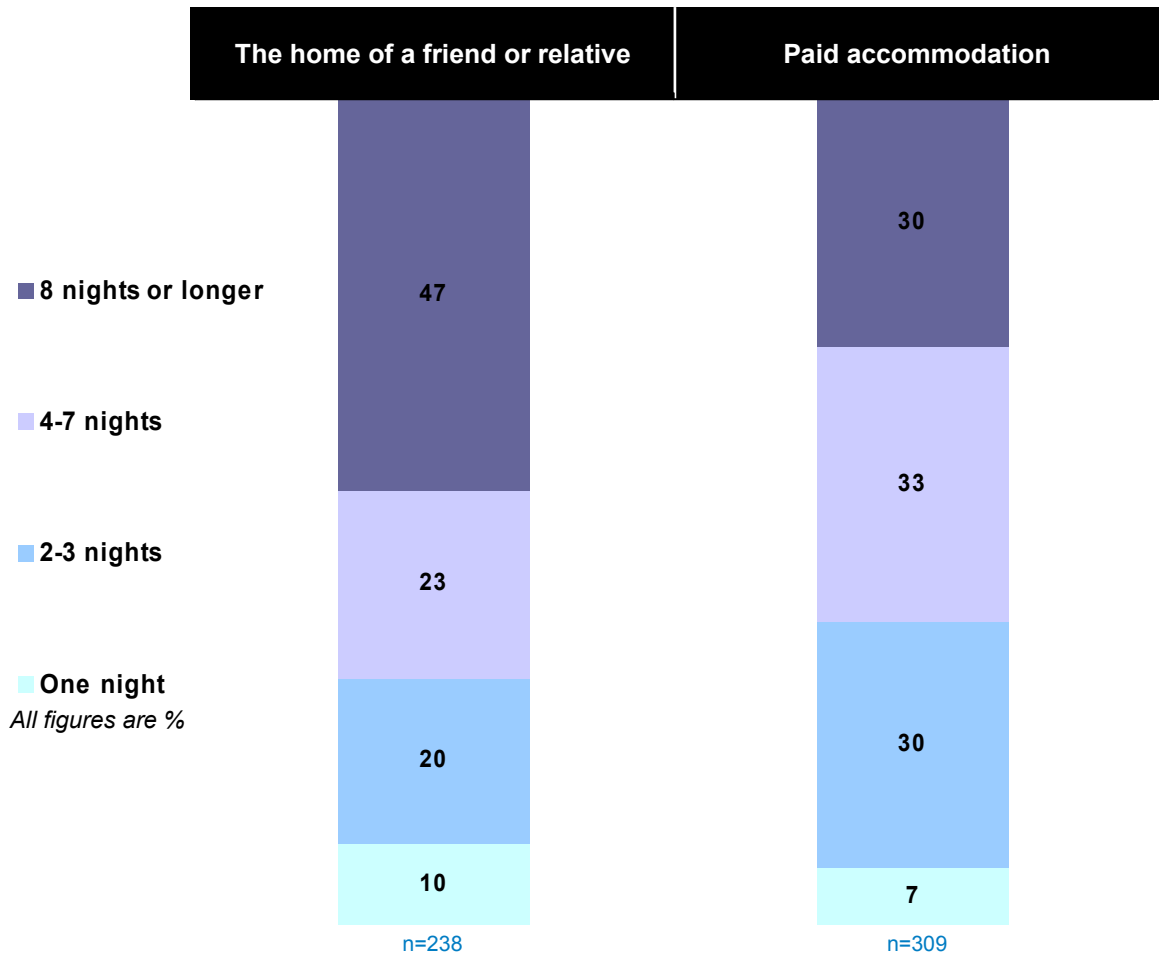
Type of Accommodation stayed in

- NSW tourists were more likely to be spending the night in the home of a friend or relative (if staying over is applicable)

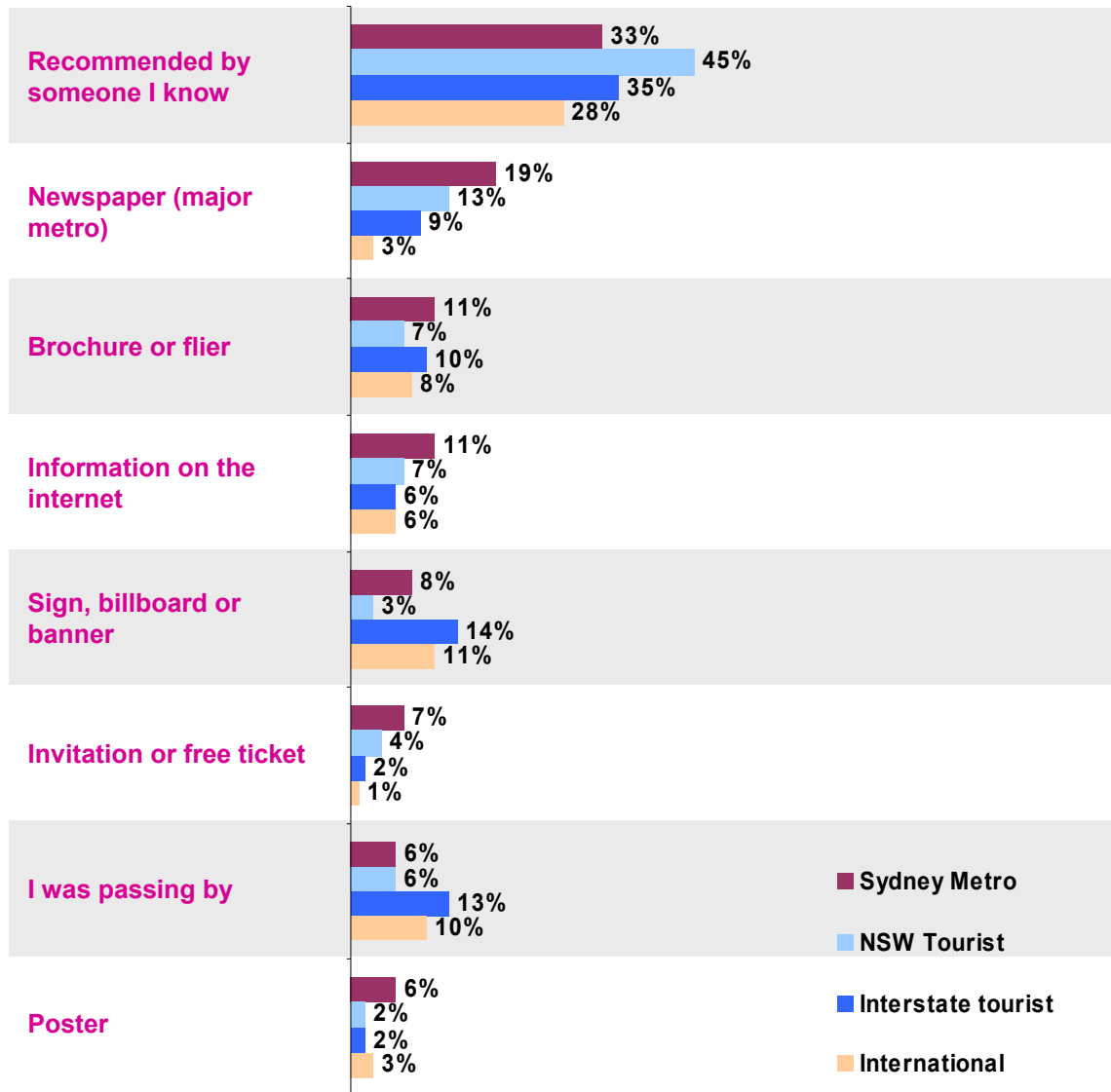


Length of time staying in Sydney

- Overall tourists who stay in paid accommodation are making shorter visits on average compared to tourists who stay in the home of a friend or relative



Source of information



- Word of mouth still plays a major role for tourists, as it does for Sydney residents
- Newspapers (both local and metro) play a lesser role as source of information about the gallery for international tourists
- Just “passing by” was more common for interstate and international tourists than NSW tourists and Sydney residents, as were “signs, billboards and banners”

Sydney Metro Index; n=1348

NSW Tourist; n=137

Interstate Tourist; n=184

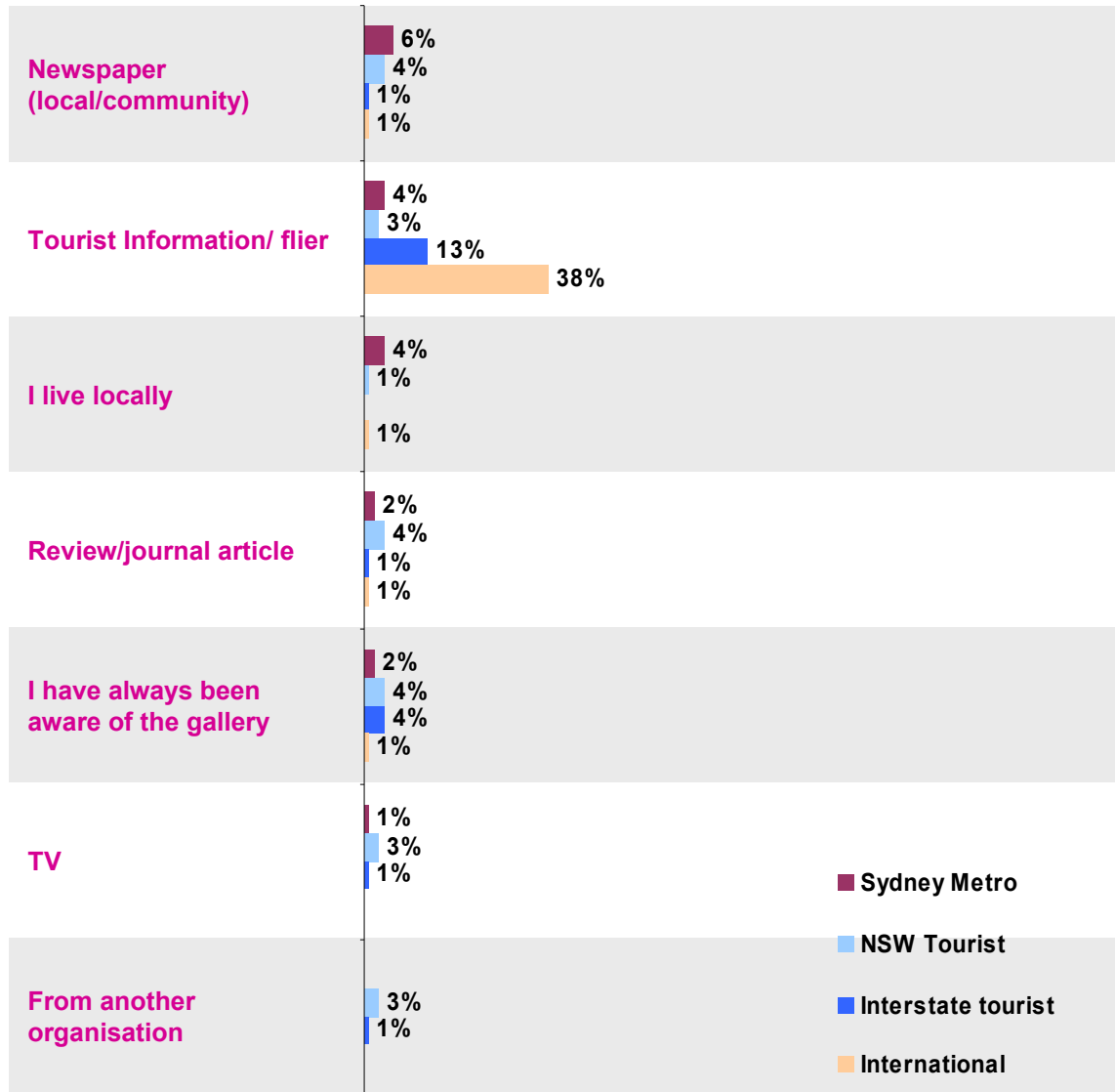
International; n=375

Base: All valid responses 105

Q6. How did you hear about the gallery or this exhibition?

TOURIST REPORT

Source of information



- The further tourists live from Sydney, the more frequently the tourist information/flier is cited as a source of information about the gallery/exhibition

Sydney Metro Index; n=1348

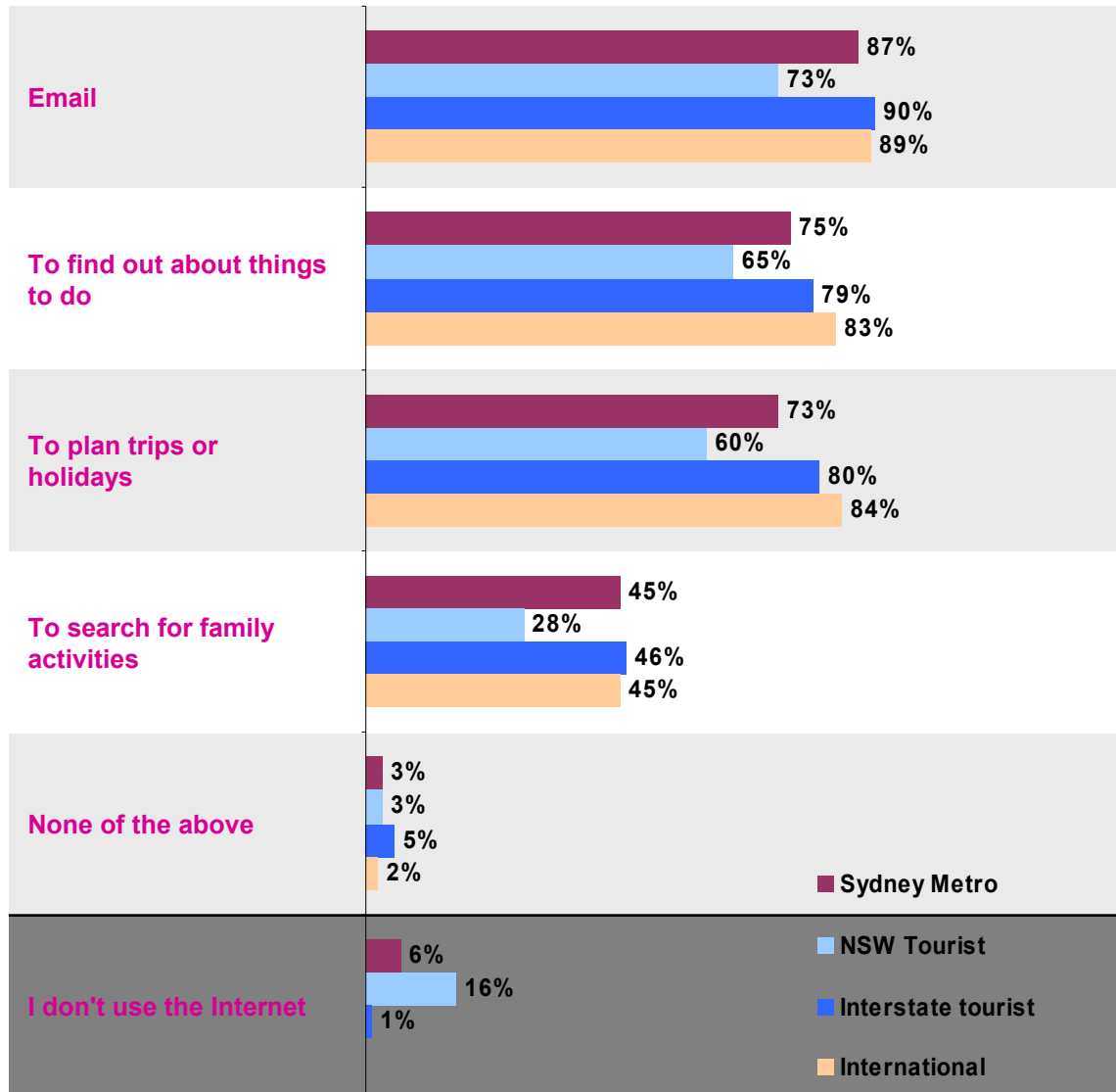
NSW Tourist; n=137

Interstate Tourist; n=184

International; n=375

Base: All valid responses 106

Q6. How did you hear about the gallery or this exhibition?



- NSW tourists are more likely than any other group to not use the internet

Sydney Metro Index; n=1348

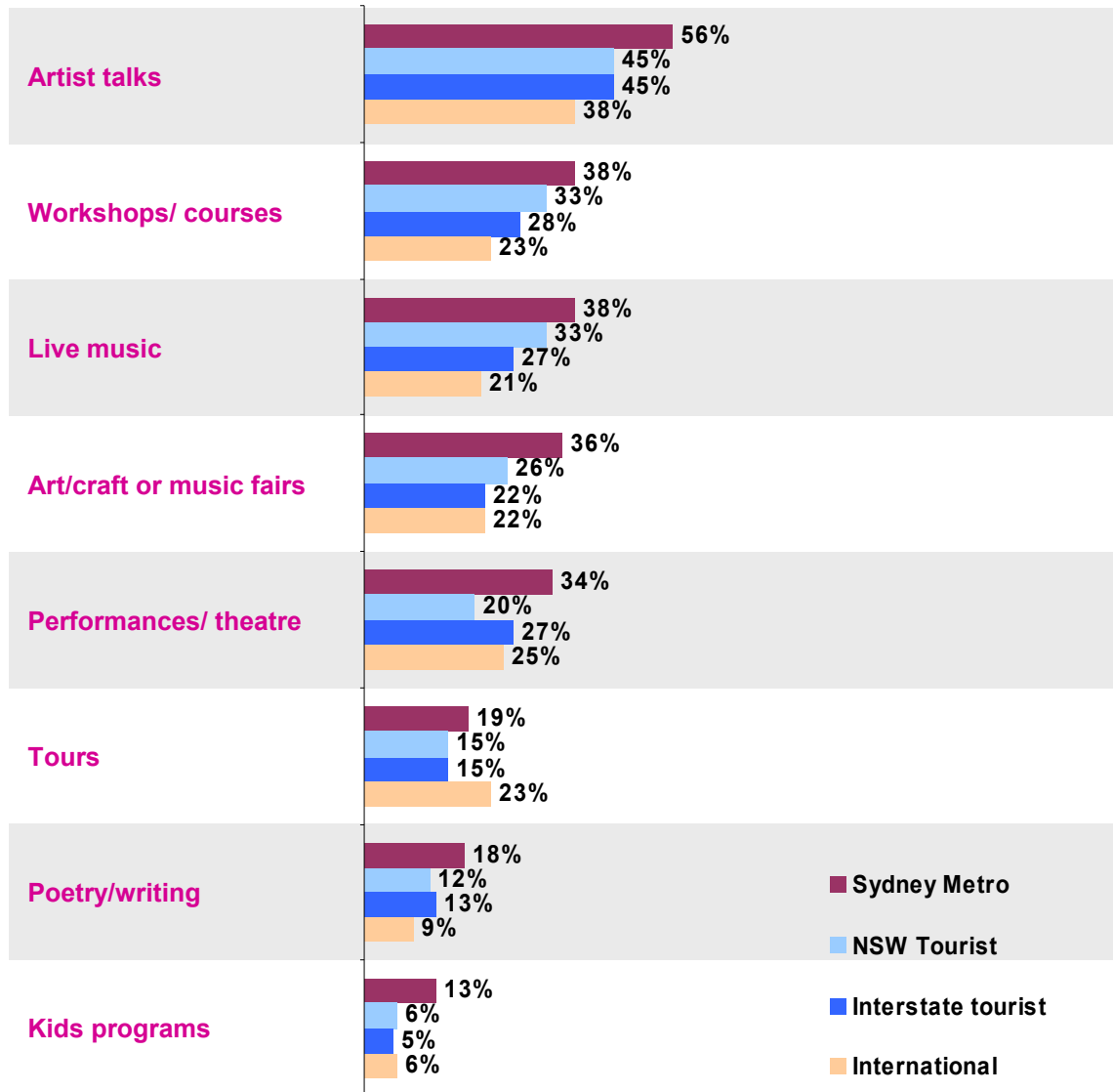
NSW Tourist; n=137

Interstate Tourist; n=184

International; n=375

Base: All valid responses 107

Preference for programs and workshops



- Overall, the further tourists live from Sydney, the less likely they are to nominate particular programs and workshop
- Tours are playing a slightly greater role for international tourists in their set of preferences compared to interstate tourists and Sydney residents

Sydney Metro Index; n=1348

NSW Tourist; n=137

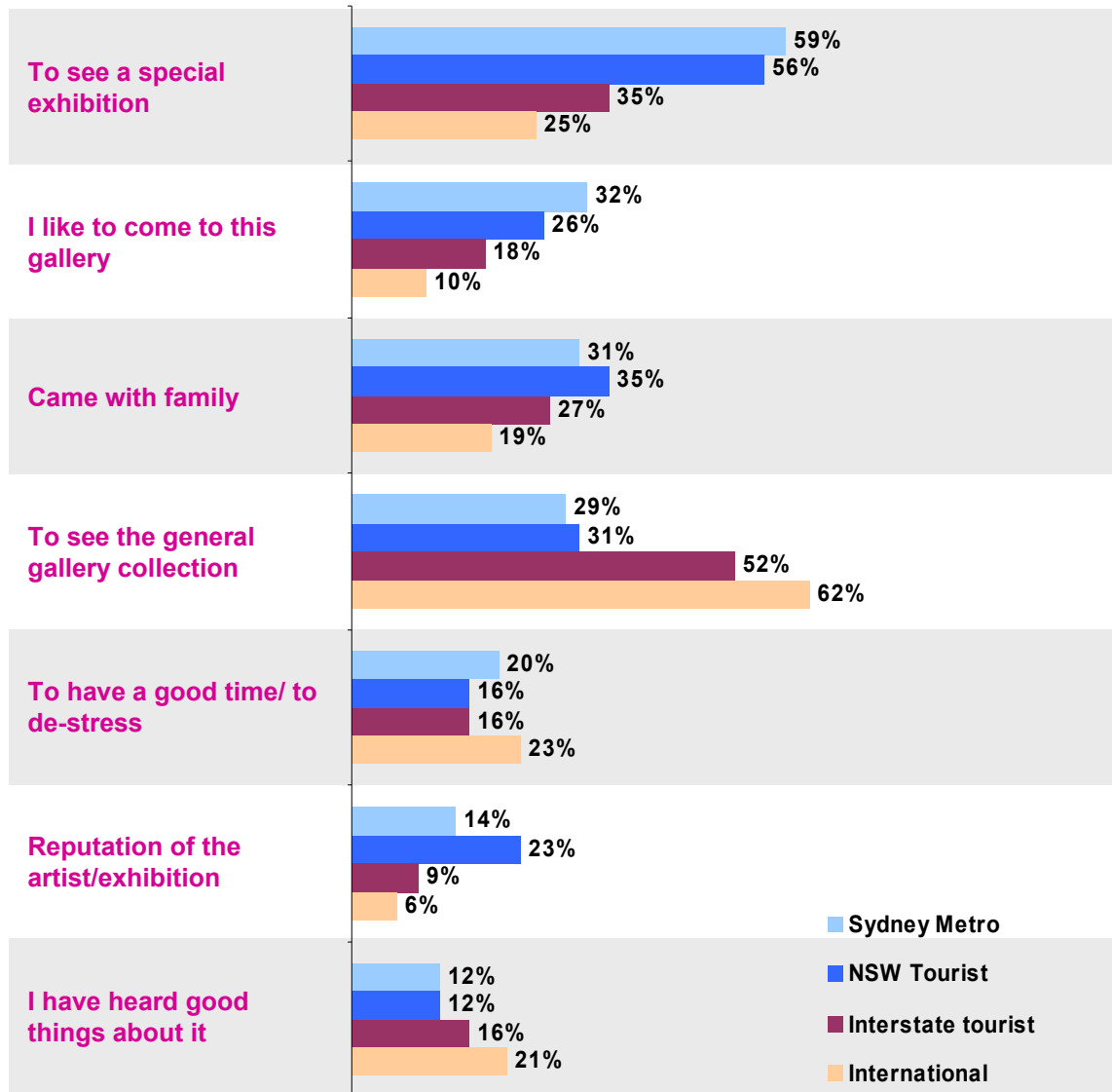
Interstate Tourist; n=184

International; n=375

Q7. What programs and workshops would you or your family like to attend here?

Base: All valid responses 108

Motivations



- Interstate and international tourists are much more likely to cite the general collection over special exhibitions as a reason for coming to the gallery, whereas the reverse is true of Sydney residents and NSW tourists
- In fact, NSW tourists are more similar to Sydney residents with respect to their motivational profile compared to interstate and international tourists

Sydney Metro Index; n=1348

NSW Tourist; n=137

Interstate Tourist; n=184

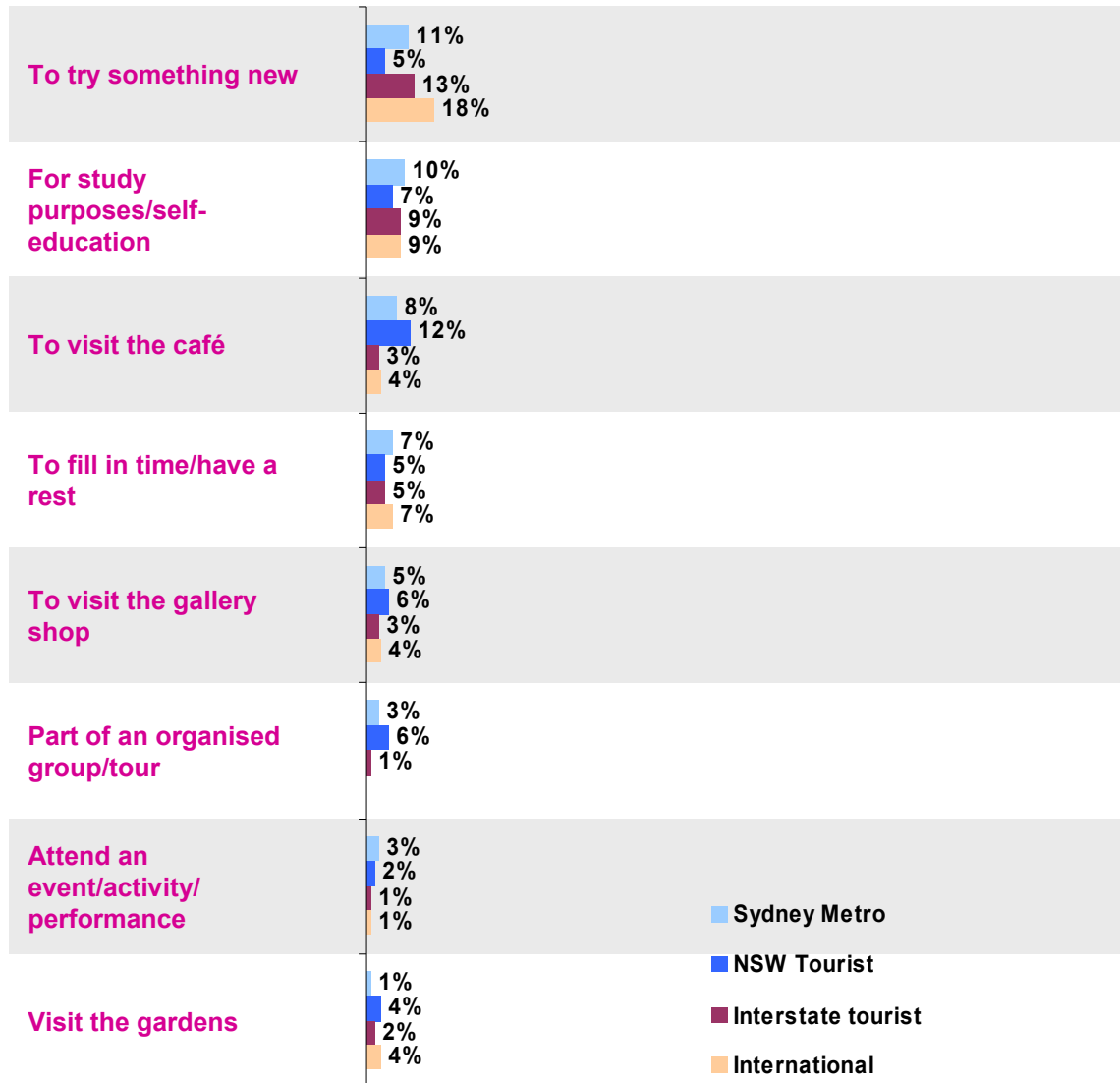
International; n=375

Base: All valid responses 109

Q8. What were the three main reasons you came to the gallery or exhibition today?

TOURIST REPORT

Motivations (cont.)



Sydney Metro Index; n=1348

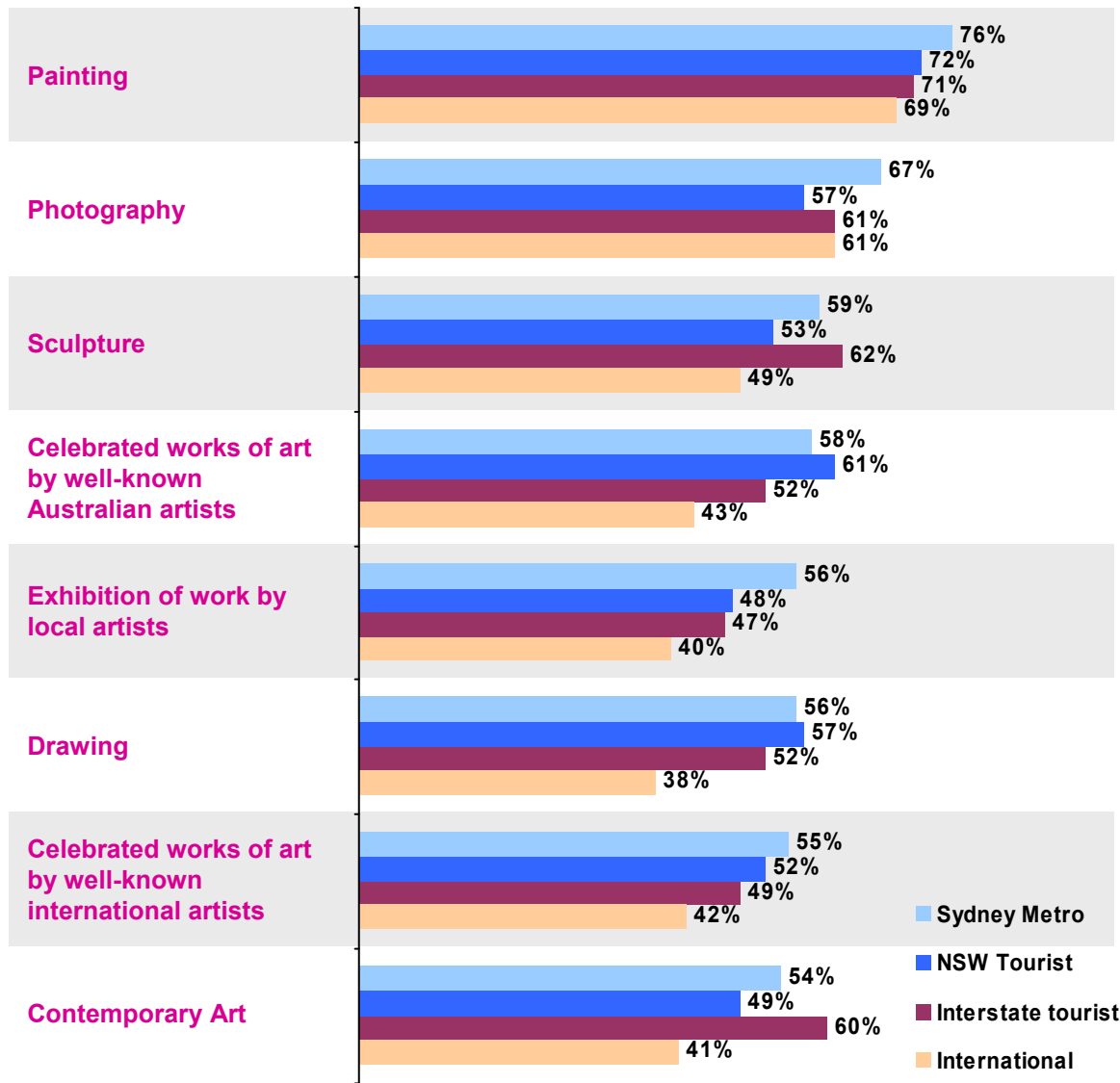
NSW Tourist; n=137

Interstate Tourist; n=184

International; n=375

Base: All valid responses 110

Q8. What were the three main reasons you came to the gallery or exhibition today?



- Painting remains the most preferred type of exhibition overall across tourist types
- Contemporary art is more popular amongst interstate tourists compared to international tourists

Q20. What sort of exhibitions would you most like to see at this gallery?

Sydney Metro Index; n=1348

NSW Tourist; n=137

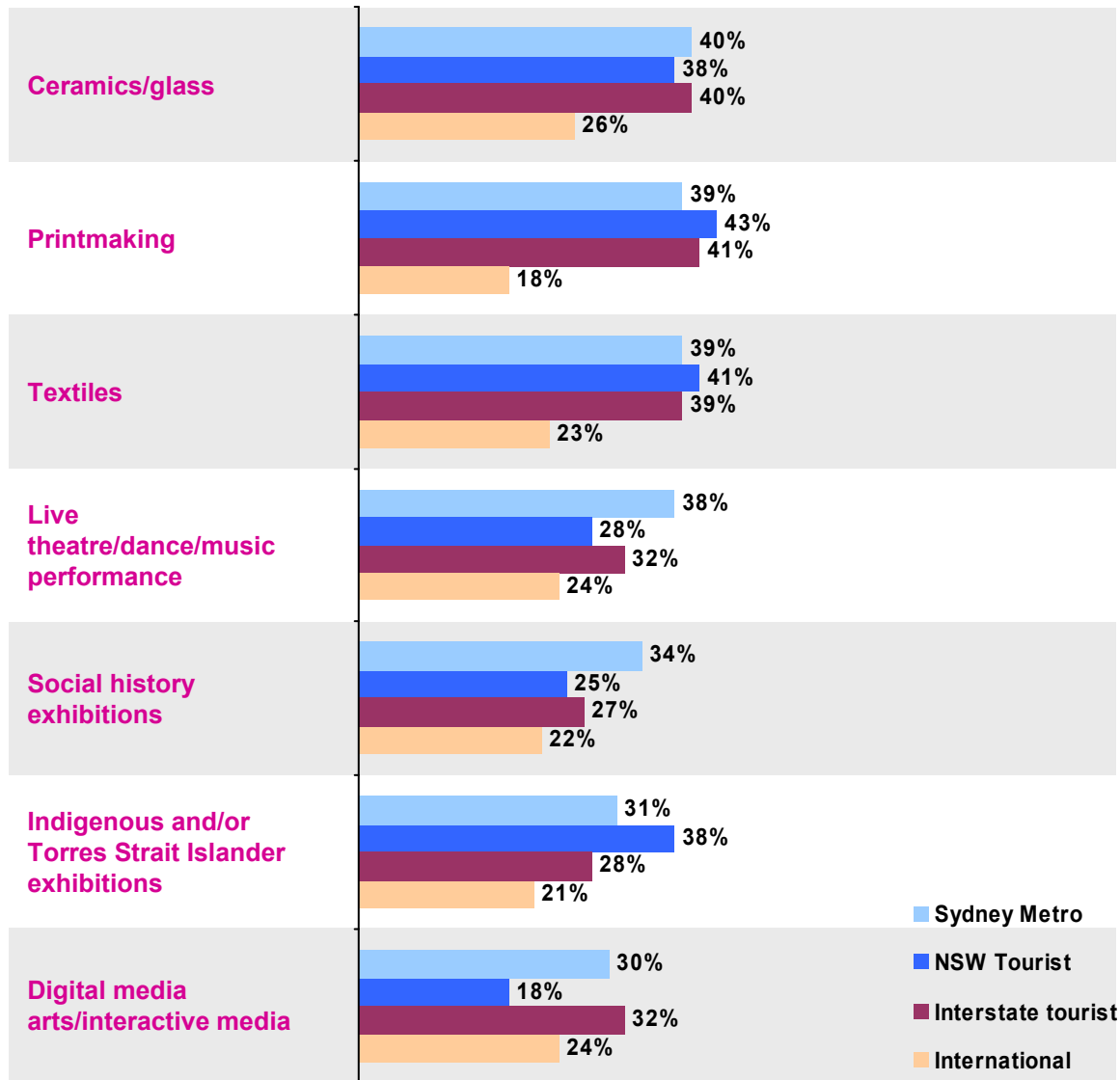
Interstate Tourist; n=184

International; n=375

Base: All valid responses 111

TOURIST REPORT

Preferred exhibitions (cont.)



Sydney Metro Index; n=1348

NSW Tourist; n=137

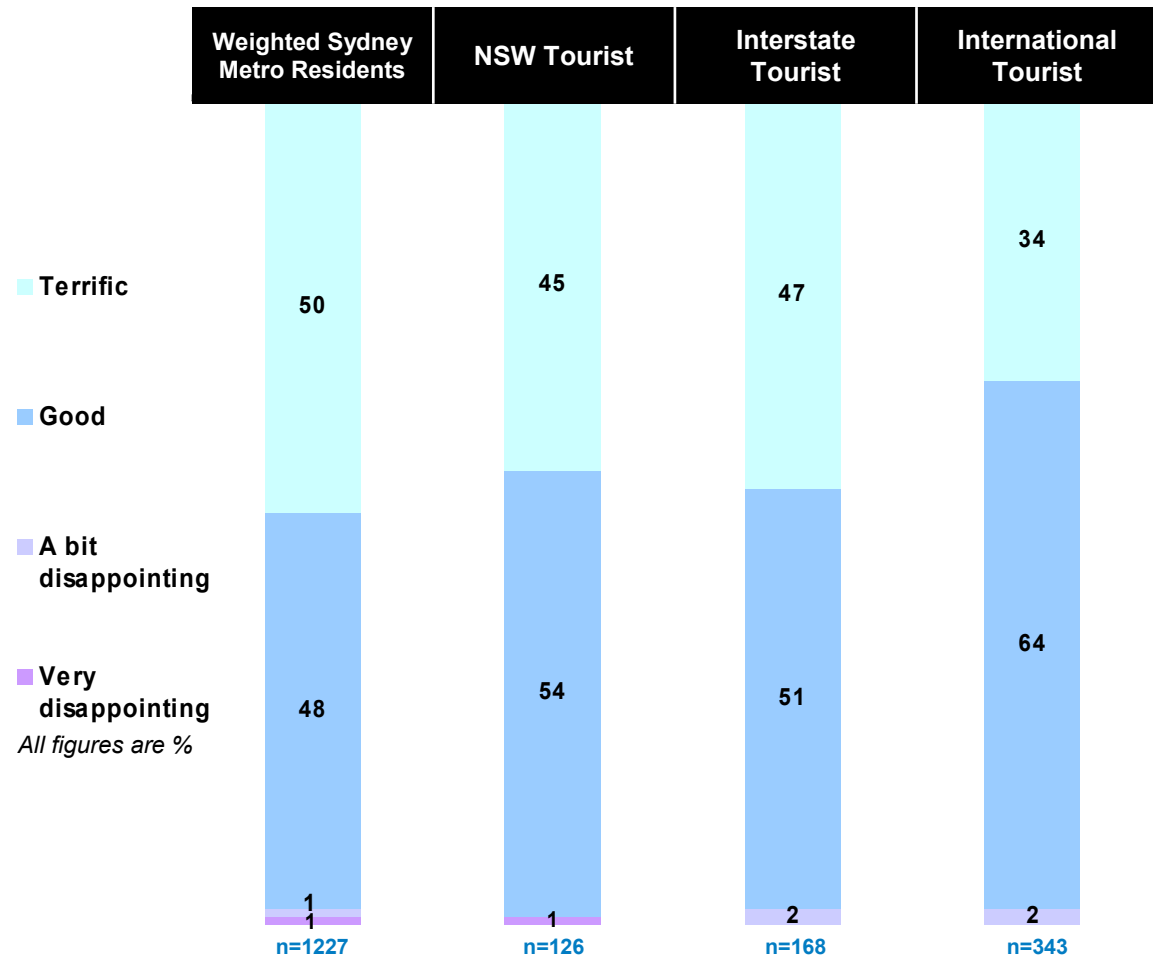
Interstate Tourist; n=184

International; n=375

Base: All valid responses 112

Q20. What sort of exhibitions would you most like to see at this gallery?

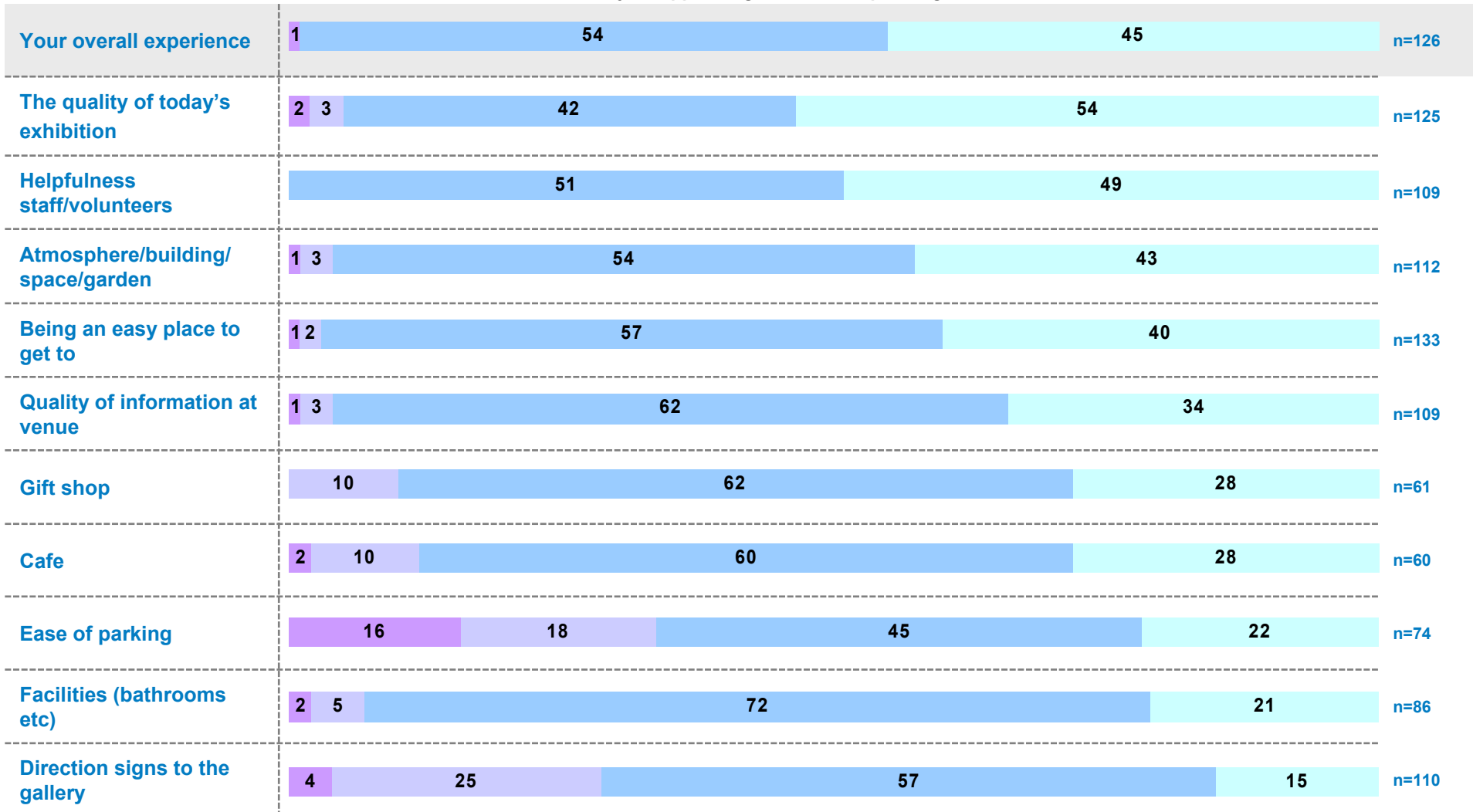
- Overall satisfaction remained high across tourist groups with nearly all indicating a good or terrific experience
- International tourists were more likely to give a “good” rating than a “terrific” rating
- On subsequent charts, the “ease of parking” is causing more dissatisfaction for interstate tourists than international tourists



TOURIST REPORT

Satisfaction Summary: NSW Tourist

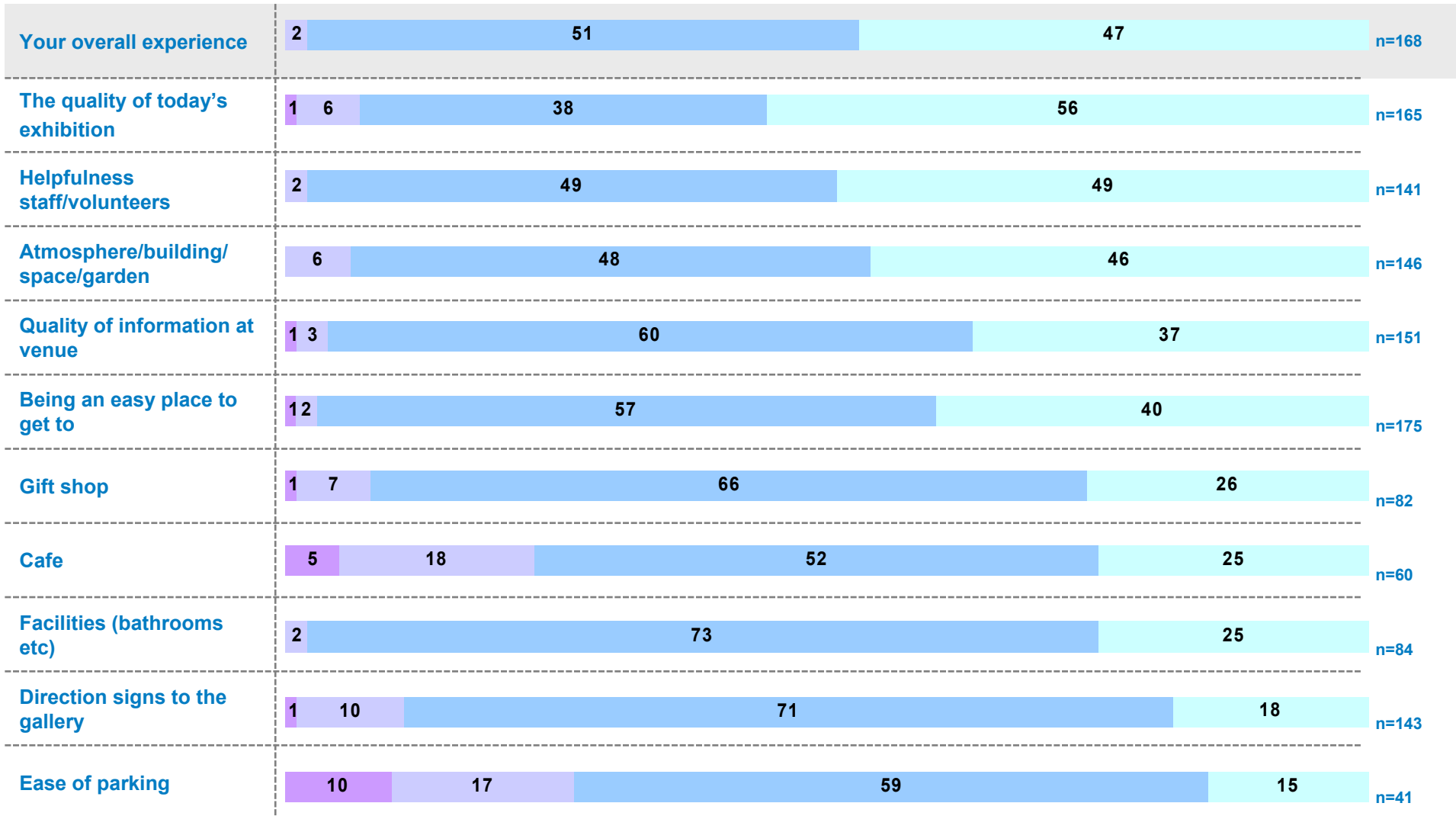
Very disappointing A bit disappointing Good Terrific



TOURIST REPORT

Satisfaction Summary: Interstate Tourist

Very disappointing A bit disappointing Good Terrific



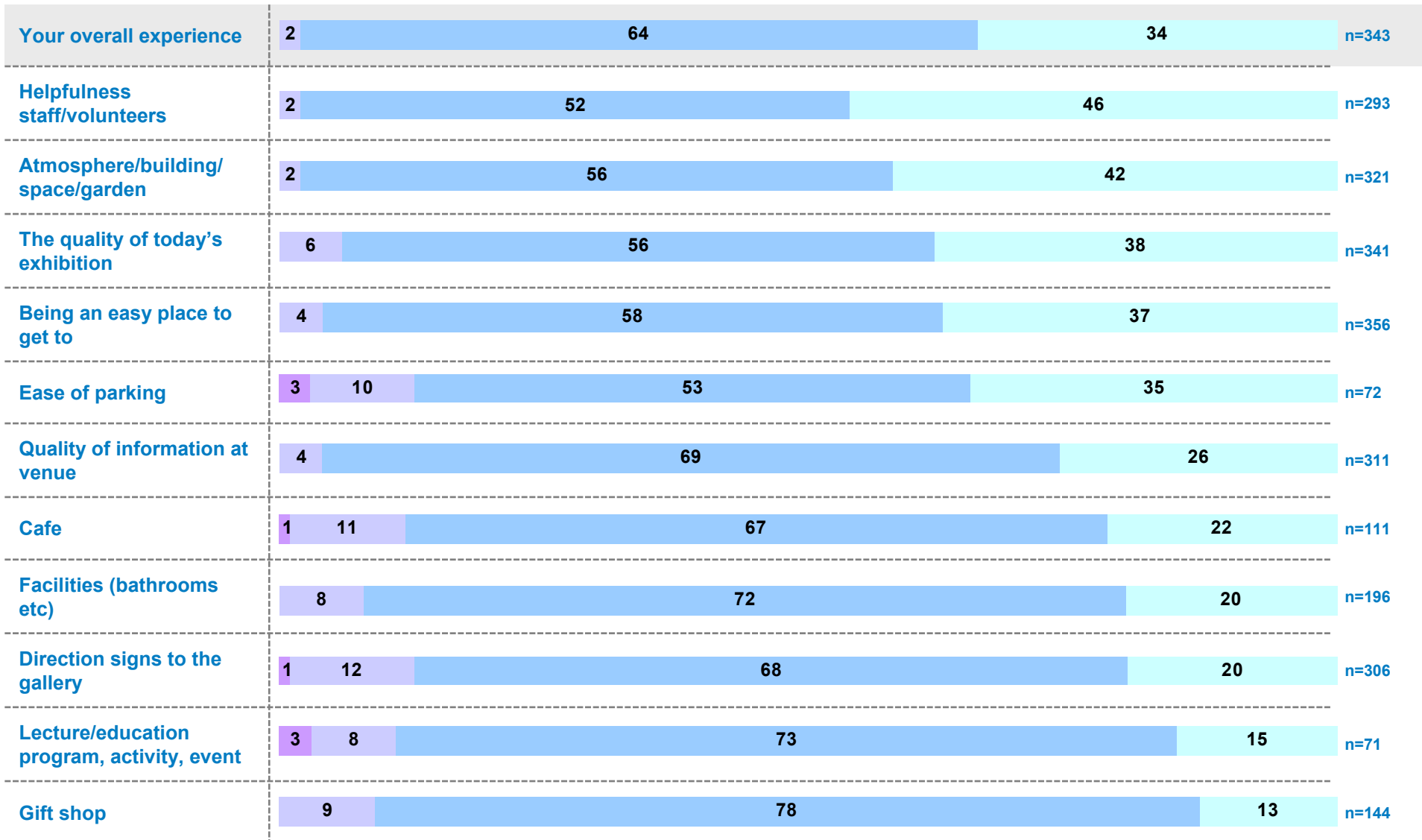
Q9. How would you rate ALL of the following in your visit today?

Base: All valid responses

TOURIST REPORT

Satisfaction Summary: International Tourist

Very disappointing A bit disappointing Good Terrific



Q9. How would you rate ALL of the following in your visit today?

Base: All valid responses

M&G NSW

Conclusions & Recommendations



© Mosman Art Gallery

Conclusions

- **There is no ‘one size fits all’ strategic recommendation that suits every gallery**
 - Galleries across Sydney Metro have very different audience profiles and hence different audience development agendas
 - The data shows that visitors to different galleries vary considerably with respect to their relative proportion of tourists, their demographic profiles, the behavioural patterns of visitation and their interests and attitudes
 - Galleries in Sydney Metro need to assess their particular audience profile (for which the Sydney Metro Index is useful in providing a yardstick for comparison)

- **Tourists and Sydney residents are distinct markets**
 - Sydney resident, NSW tourists, interstate and international tourists have different motivations, behaviours, attitudes and demographic profiles
 - In particular, tourists are much more likely to be first-time visitors than Sydney residents (and the further away from Sydney they live, the more likely different tourist types are to be first time visitors)
 - Tourists are more likely to be interested in general exhibitions as opposed to special exhibitions (whereas the reverse is true of Sydney resident visitors)

- **NSW tourists are more similar to Sydney residents than interstate or international tourists**
 - A high proportion of NSW tourists are day-trippers, who do not stay overnight in Sydney

Conclusions

- **Galleries are connecting to a culturally-diverse audience who live in Sydney**
 - Around 22% of gallery visitors surveyed speak a language other than English at home, and it likely that the actual proportion is higher when you consider the questionnaire was only available in English
- **Income is not a barrier to visiting galleries for Sydney Metro residents**
 - Visitors from all income groups (gross annual household) are represented at galleries, and the income group are in line with ABS statistics for the Sydney Statistical Division
- **Women display a more social visitation pattern than men**
 - Men are more likely to visit the gallery on their own or with their spouse/partner compared to women, who are more likely to visit with friends (with or without children)
- **Full-time workers who live in Sydney have a strong presence at galleries (with around 1 in 3)**
 - So despite the typical 9-5 opening hours of galleries, full-time workers are making an active choice to attend galleries

Conclusions

- **There appears to be a segment of visitor population who are “serial gallery-goers”**
 - These avid visitors attend *multiple galleries* in Metro Sydney on a frequent basis (including the gallery being surveyed)
 - The data shows a strong correlation between the number of times visitors have attended a particular gallery and the number of times they had visited other galleries in Metro Sydney in the past 12 months
 - There is also a strong correlation in the data by how recently they visited a gallery and the number of times they had visited other galleries in Metro Sydney

- **Galleries have overlap with respect to audiences they serve**
 - The “serial gallery-goers” are visiting multiple galleries across Sydney Metro

- **Workshop, talks and group activities seem to be important in developing loyal, repeat visitors**
 - There is a strong correlation between attendance at workshop, talks and/or group activities and:
 - The number of prior visits to the gallery
 - The amount of time spent in the gallery
 - The most recent visit to the gallery
 - The frequency of attendance at other galleries in Metro Sydney

Conclusions

- **Internet use is high amongst visitors but there is a “gap” between general usage and its role as source of information about a gallery**
 - The data shows that Internet is commonly used as a source of information about general "things to do" (around 75% of visitors on average) and the number of visitors citing the Internet as source of information about the gallery they attend (around 10%)
- **Word of mouth maintains pre-eminence**
 - Hearing about the gallery or exhibition through a friend or friend's referral is the single most common source of information about the gallery

Recommendations

- **Galleries should consider the different needs, attitudes and behaviours of interstate and international tourists and Sydney resident visitor populations**
 - As these segments of tourists are distinct in their profiles, attitudes, behaviours, needs and wants
- **Interstate and international visitors would benefit from first-time guidance in the gallery**
 - The data has shown that interstate and international tourists are much more likely than Sydney residents to be first-time visitors, and they show a higher propensity to be interested in tours
- **There may be opportunity for galleries to explore transport and catering partnerships for NSW tourists to assist in providing the ideal “day out in Sydney”**
 - As NSW visitors appear more likely to be “day-trippers” (nearly half of NSW tourists do not indicate they stay overnight in Sydney)

Recommendations

- **There is opportunity for cross-promotional partnerships between galleries to target “serial gallery-goers”**
 - As the same visitors are attending multiple galleries, co-operation amongst galleries in marketing to this enthusiastic audience may be mutually beneficial
 - Cross-promotional activities may lead to greater networking and audience development
- **Galleries may wish to consider collaborative or sympathetic programming initiatives (such as a “cultural trail”)**
 - A combined effort to promote series of exhibitions across different galleries may be an effective strategy in developing the Sydney audience, as we know that many Sydney resident visitors are interested in special exhibitions and visiting multiple galleries in Metro Sydney

Recommendations

- **Workshops, talks and group activities should be leveraged as a means to develop gallery loyalty and repeat visitation**
 - Artist talks are most frequently cited preferred workshop type by Sydney residents and could be leveraged as an important way by which galleries create meaningful experiences and develop relationships with their audience

- **E-marketing be explored to close the gap between internet usage and the awareness of an individual gallery's profile and programs on-line**
 - There is opportunity to reach a greater share of the 75% of visitors who are using the internet to find “something to do”
 - The data also shows the internet marketing for galleries is more effective in reaching younger (under 35) visitors, so e-marketing strategies may be important to developing younger audiences. These e-marketing strategies may include the use of social networking sites, which have recently had a large impact in the marketing realm

- **Leverage and utilise “word of mouth” to allow current audiences to advocate to new audiences**
 - There could be opportunity to develop new Sydney resident audiences through initiatives such as “bring a friend” events
 - Create collateral to allow for audiences to advocate on the galleries behalf

Further research

- **Audience segmentation studies may provide more effective strategic planning for galleries**
 - Segmentation allows marketing efforts to target specific audience groups
 - It can also provide a framework and rationale for positioning the gallery's communications and branding for optimum audience reach and development
- **Qualitative research will provide a deeper level of understanding of visitors**
 - Qualitative research uncovers why audience think and act the way they do
 - This type of research may take the form of accompanied gallery visits, observational research in galleries, and traditional methods such as focus groups or in-depth interviews
 - Qualitative research also may provide valuable hypotheses on what audience segments exist, and how they may be quantified
- **Longitudinal studies measure audiences at regular intervals over a long period of time**
 - Longer fieldwork periods may provide more reliable data by negating the effect of negate the effect of specific exhibitions
 - It will allow us to track how audiences are changing over time

Further research

- Non-attendee and lapsed visitor research may uncover barriers to visitation
 - By understanding the barriers to visitation and overcoming them, we may discover opportunity grow our audiences

Appendix

M&G NSW



Hazelhurst Regional Gallery installation featuring the exhibition *FLORA: Still Life Moving Fast*. Photo: Silversalt.

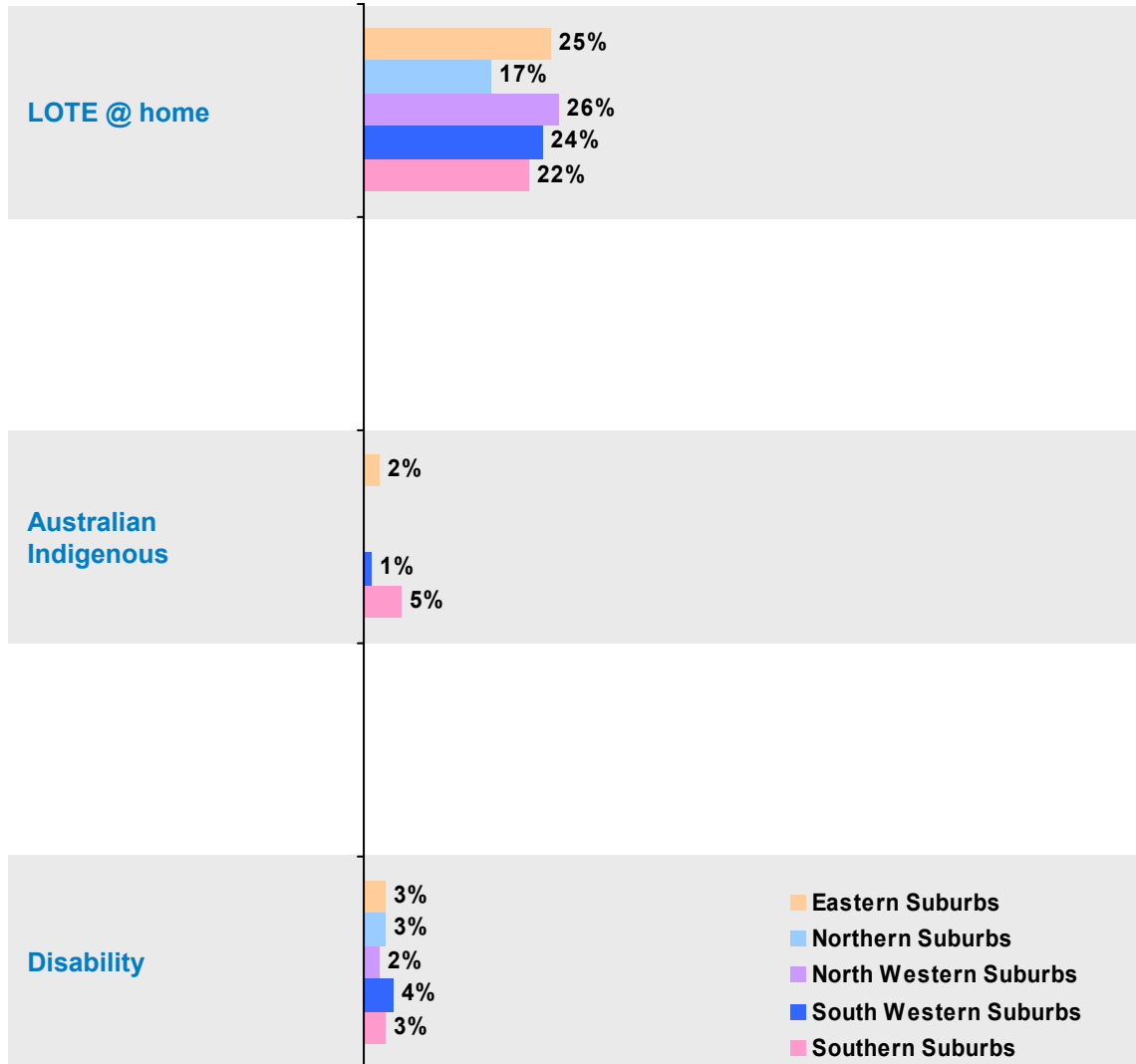
Origins – Where are Sydney residents from?

Sydney Metro region postcode breakdown

- Inner City (Sydney) (2000-2005)
- Eastern suburbs (2010-2011, 2021-2030)
- Northern suburbs (2055-2114)
- North Western suburbs (2115-2126, 2145-2159, 2740-2786)
- South Western suburbs (2127-2144, 2160-2202, 2555-2574)
- Southern suburbs (2006-2009, 2012-2020, 2031-2054, 2203-2249)

Diversity

Variations by region



- Visitors from the Northern suburbs are the least likely to speak a language other than English at home
- Visitors from the Southern suburbs are the most likely to identify as Indigenous Australian

Q14. Do you speak a language other than English at home?

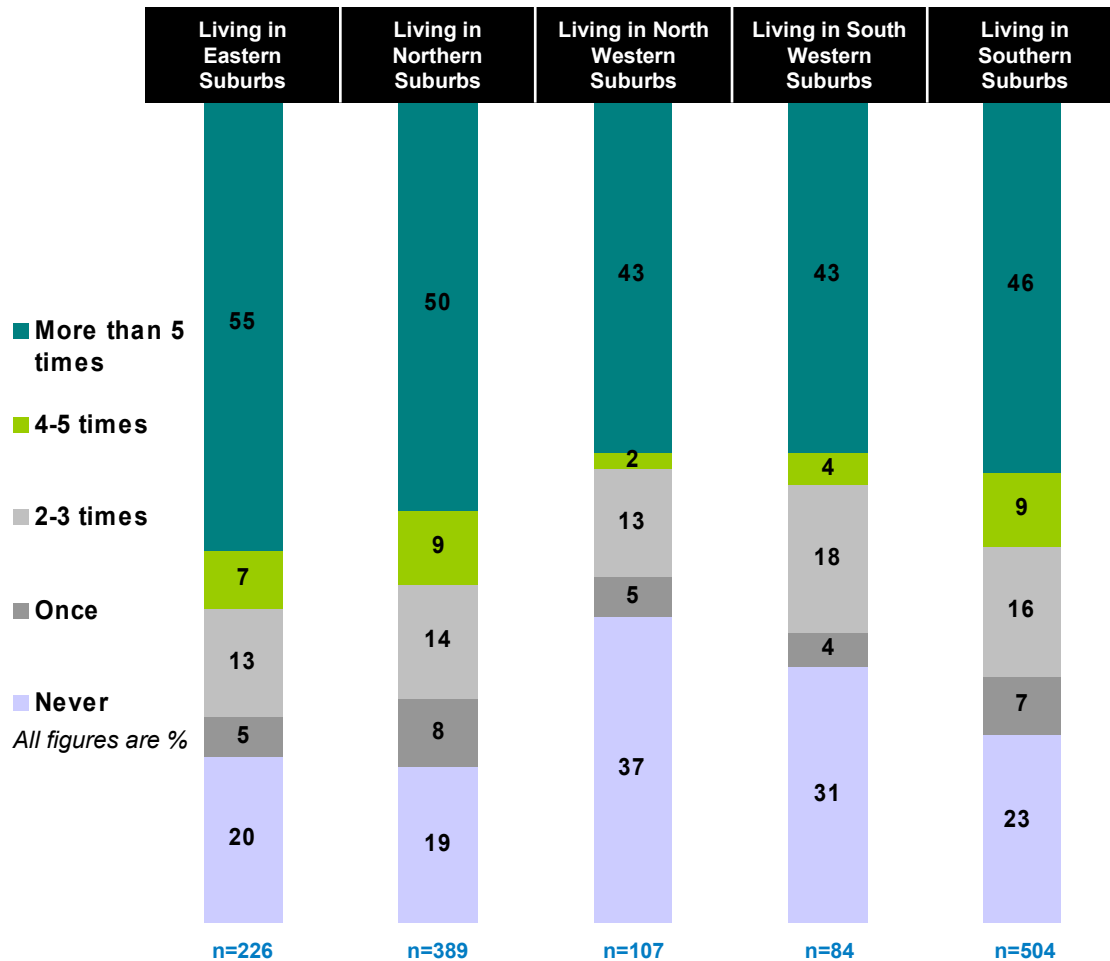
Q13. Are you of Aboriginal or Torres Strait Islander decent?

Q25. Do you have a disability or other condition that impacted on your visit today?

SYDNEY RESIDENT REPORT

Number of times visited

Breakdown by Residential Postcode



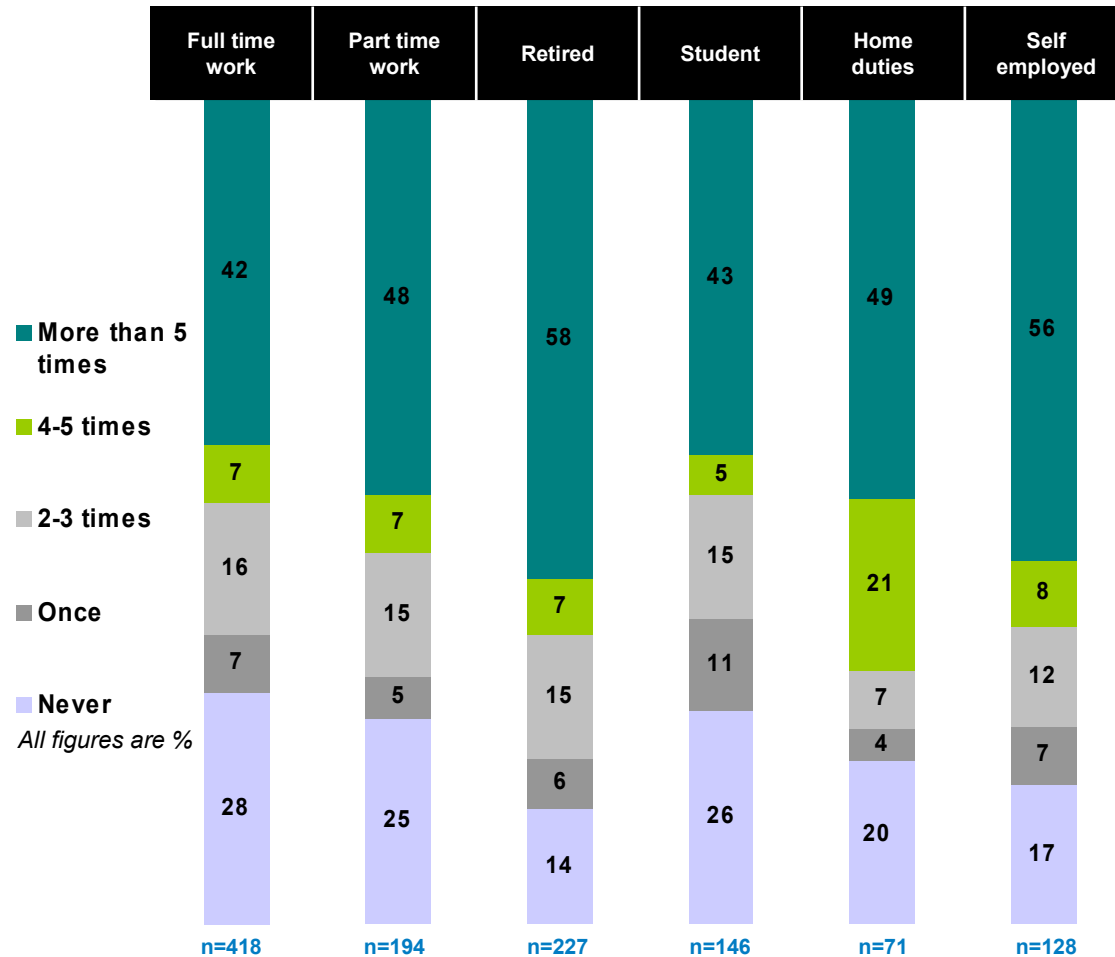
- Visitors from the North Western suburbs were more likely to be first time visitors
- Visitors from the South Western suburbs were also more likely to be first time visitors

Q.23. Thinking about the past 12 months, how many times have you been to a Museum or Gallery in Metro Sydney?

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

Number of times visited

Breakdown by Employment type



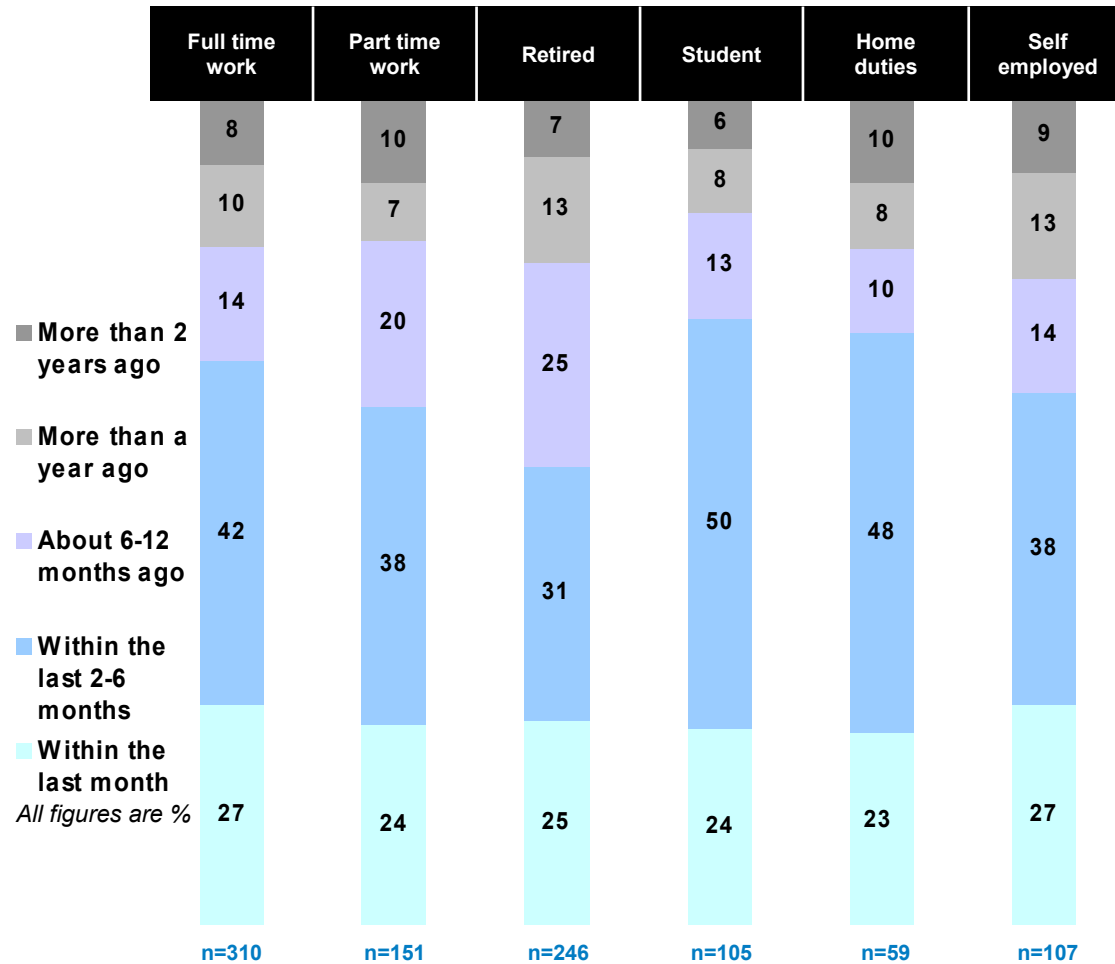
- Retirees are the most likely to have visited the gallery more than 5 times, followed closely by the self-employed

Q24. What is your main occupation?

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

When last visited

Breakdown by Employment Type



- Retirees were less likely to have visited the gallery within the last 6 months
- All employment types were equally likely to have visited the gallery within the last month

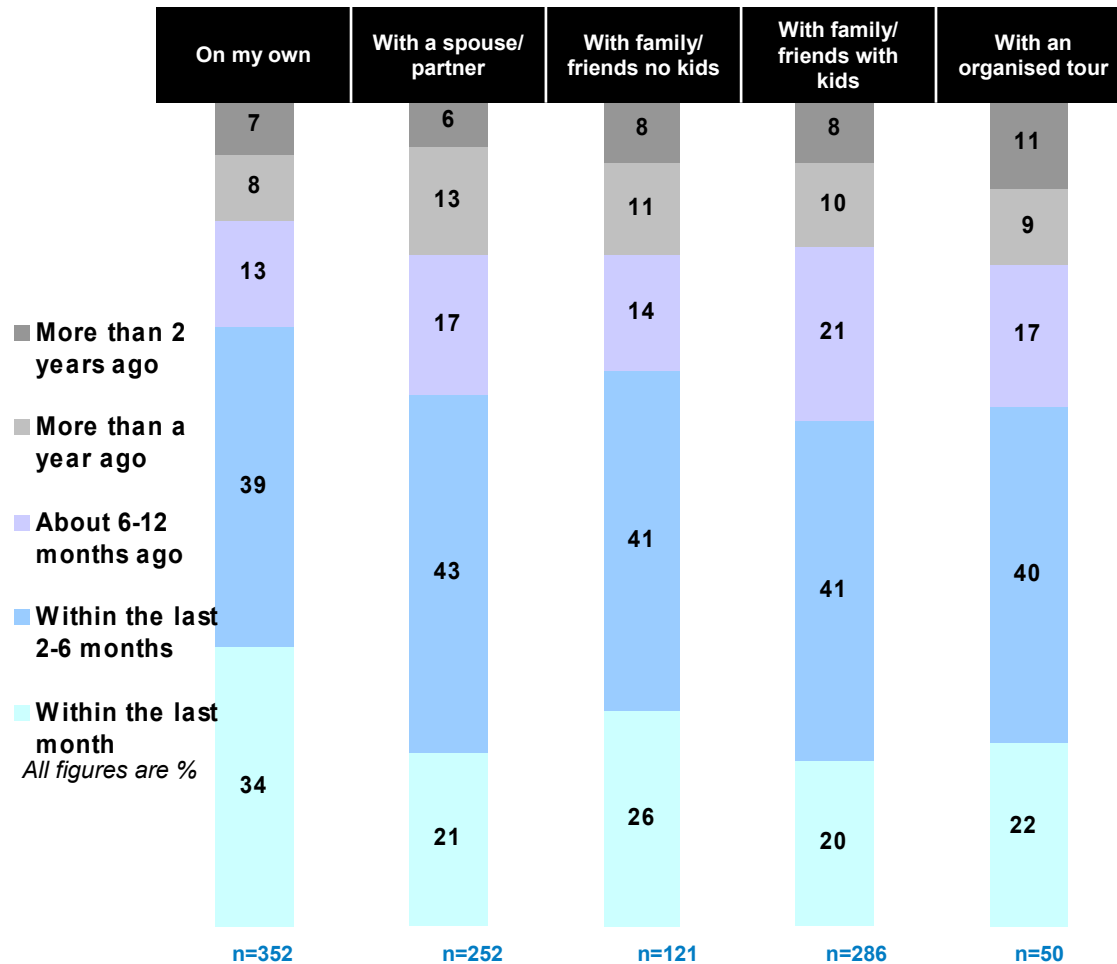
Q26. Which of the following age groups are you in?

Q2. When was your last visit?

SYDNEY RESIDENT REPORT

When last visited

Breakdown by Who Visiting Gallery With



- Those who visit on their own were the most likely to have visited within the last month (34%)

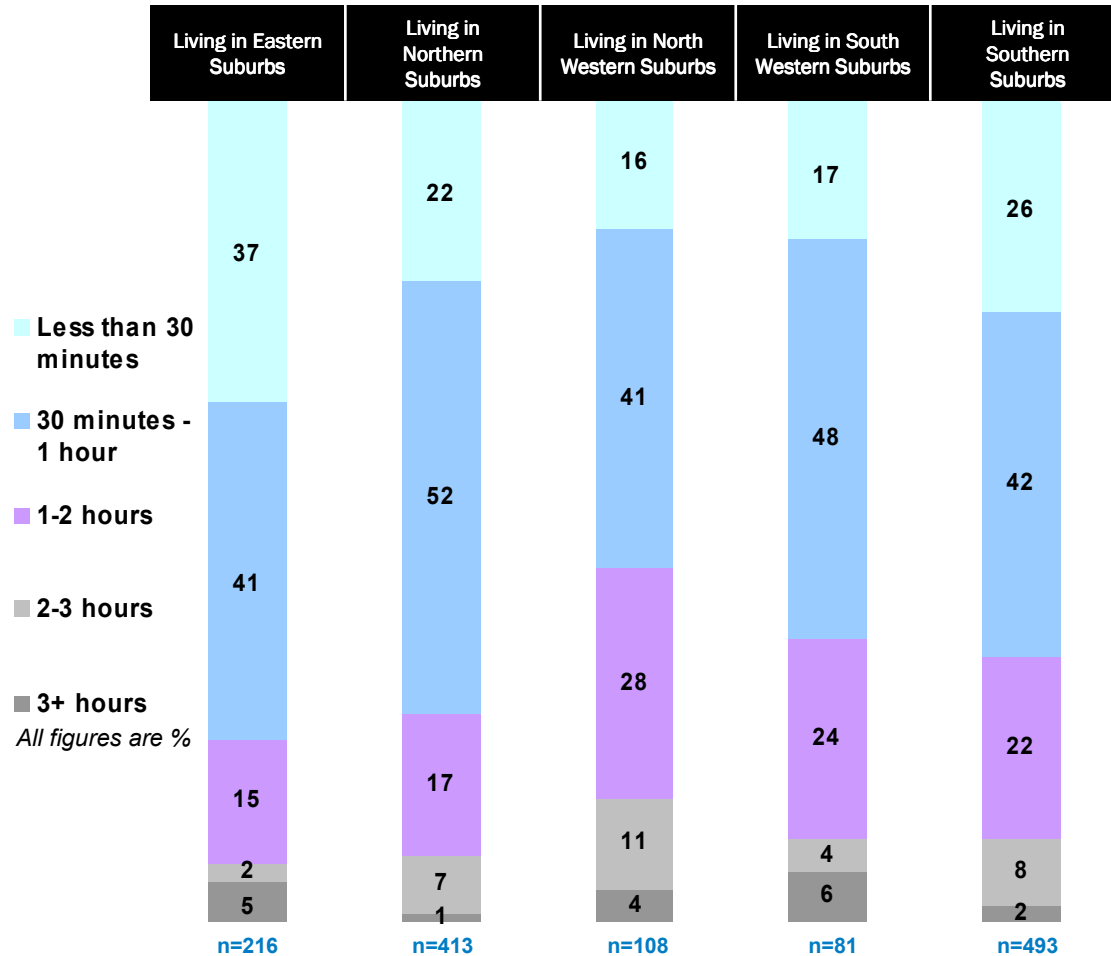
Q3. Who are you visiting with today?

Q2. When was your last visit?

SYDNEY RESIDENT REPORT

Length of visit

Breakdown by Residential Postcode



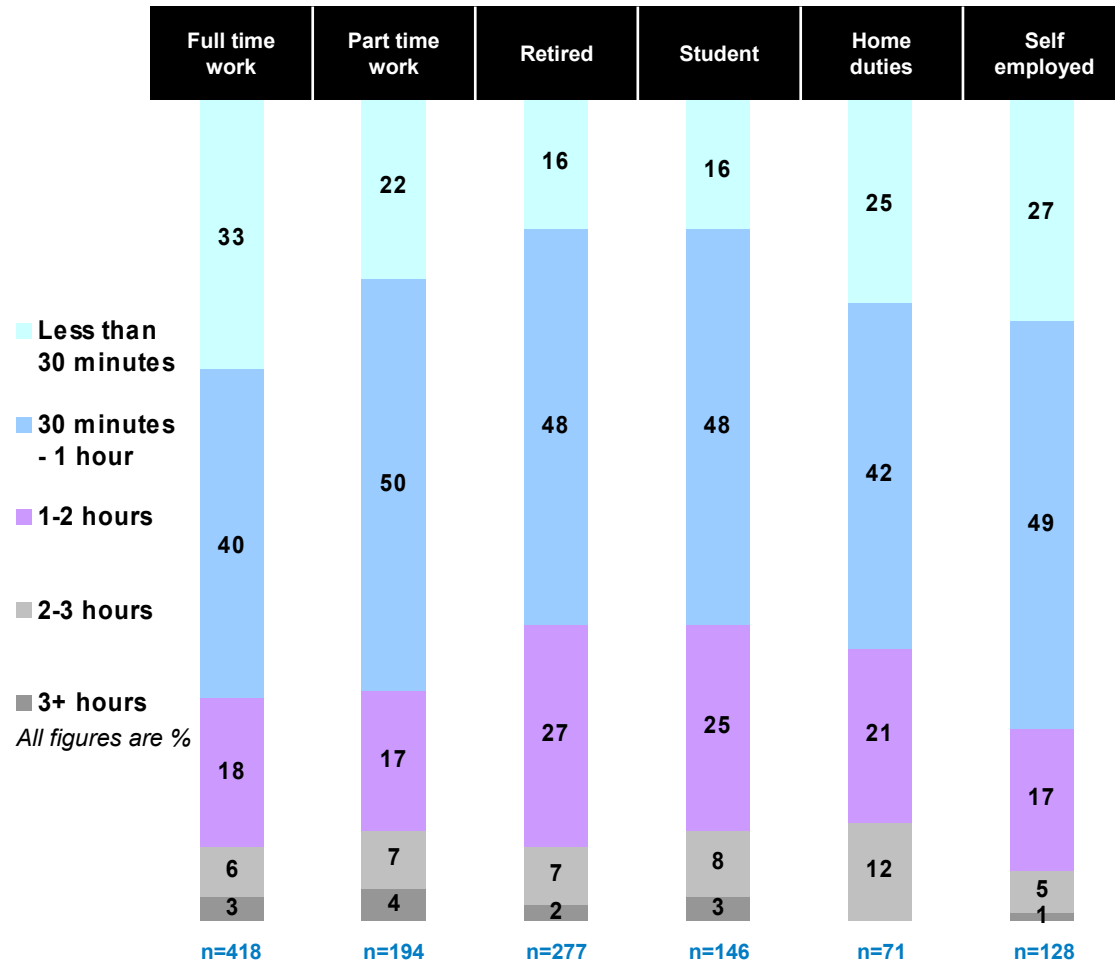
- Visitors from the Eastern suburbs are most likely to spend less than 30 minutes in the gallery (37%)

Q16. What is your residential postcode?

Q4. How long was your visit today?

Length of visit

Breakdown by Employment Type



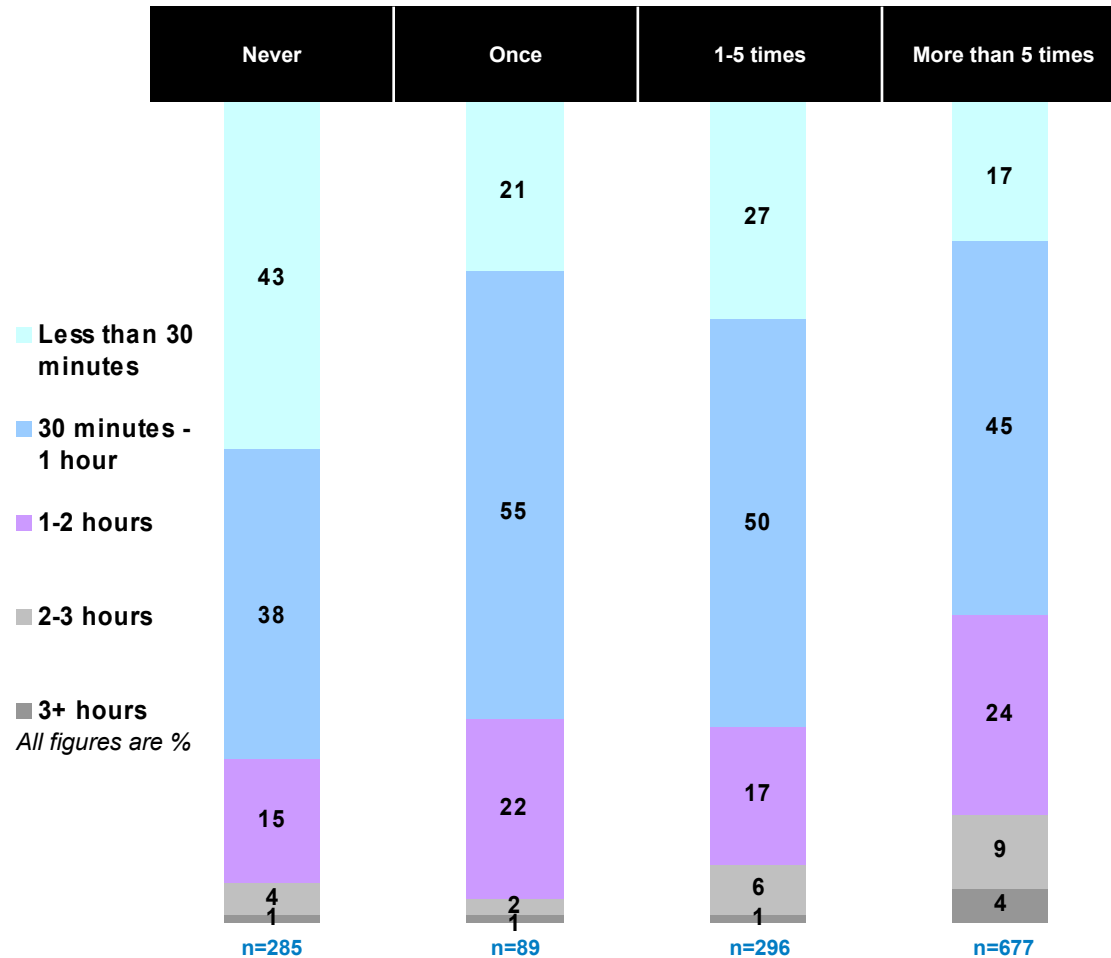
- Retirees and students are making the longest stays in the galleries on average
- Full-time workers are most likely to be spending less than 30 minutes in the gallery

Q24. What is your MAIN occupation?

Q4. How long was your visit today?

Length of visit

Breakdown by Number of Previous Visits



- Retirees and students are making the longest stays in the galleries on average
- Full-time workers are most likely to be spending less than 30 minutes in the gallery

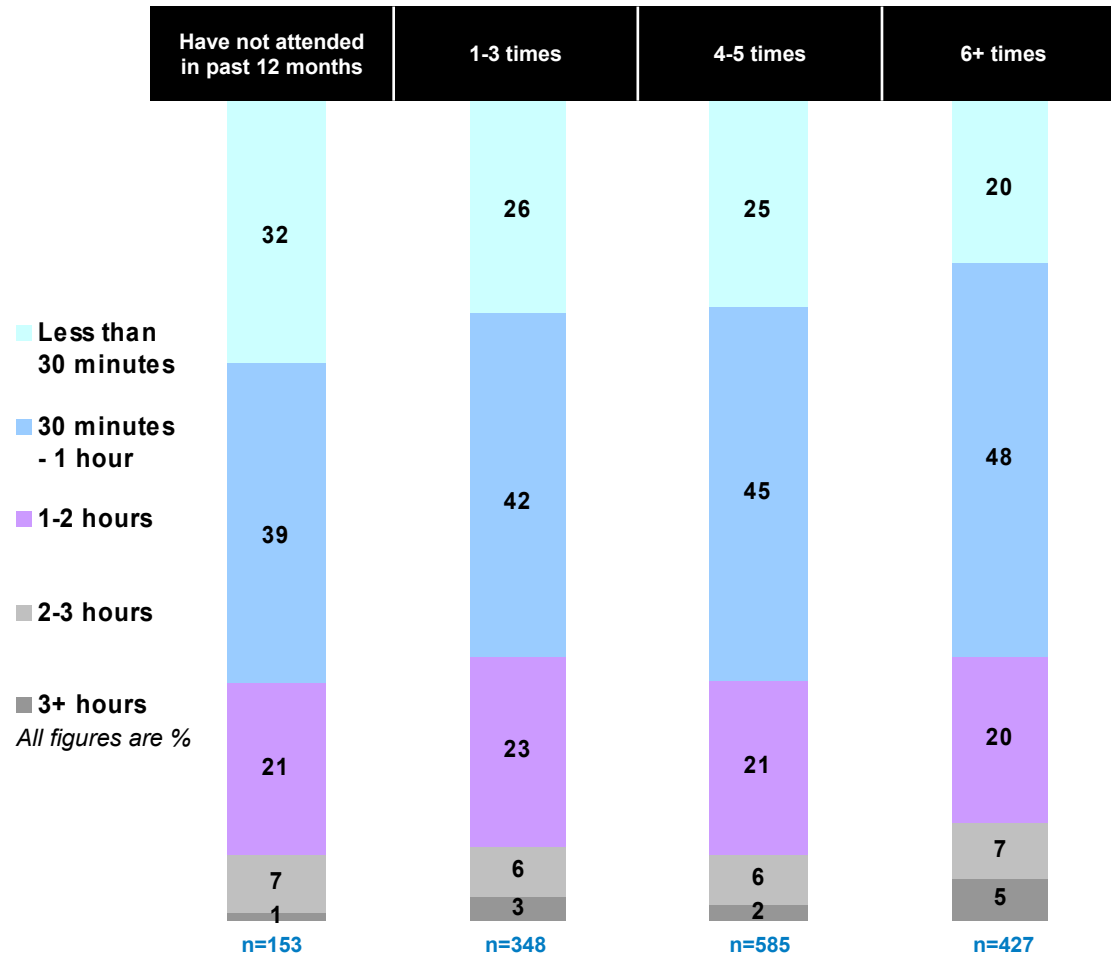
Q1. How many times have you visited this gallery before today?

Q4. How long was your visit today?

SYDNEY RESIDENT REPORT

Length of visit

Breakdown by Frequency of Visitation to Other Galleries in Metro Sydney

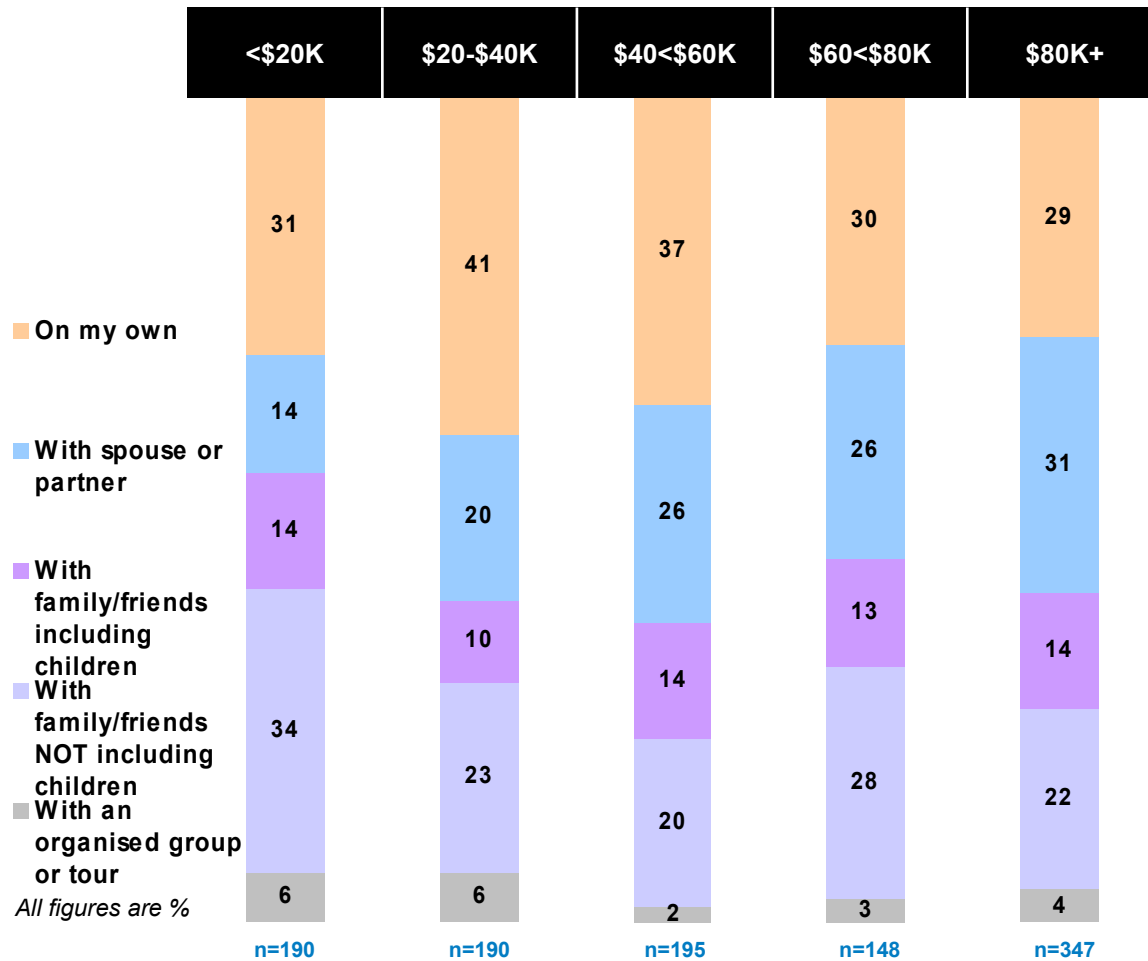


Q.23. Thinking about the past 12 months, how many times have you been to a Museum or Gallery in Metro Sydney?

Q4. How long was your visit today?

Who visited with

Breakdown by Income

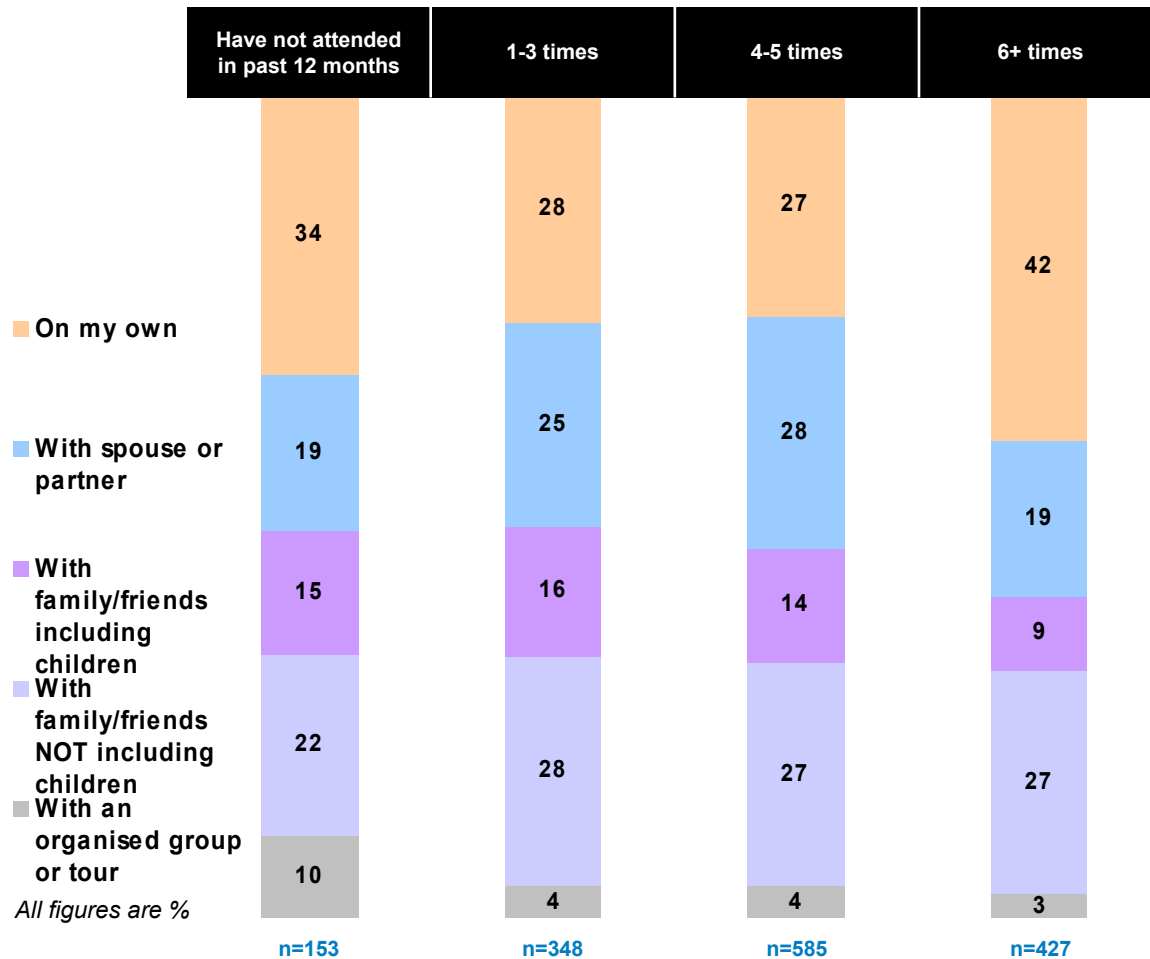


Q27. What best describes your gross (before tax) annual household income, including pensions and benefits?

Q3. Who were you visiting with today?

Who visited with

Breakdown by Frequency of Visitation to Other Galleries in Metro Sydney



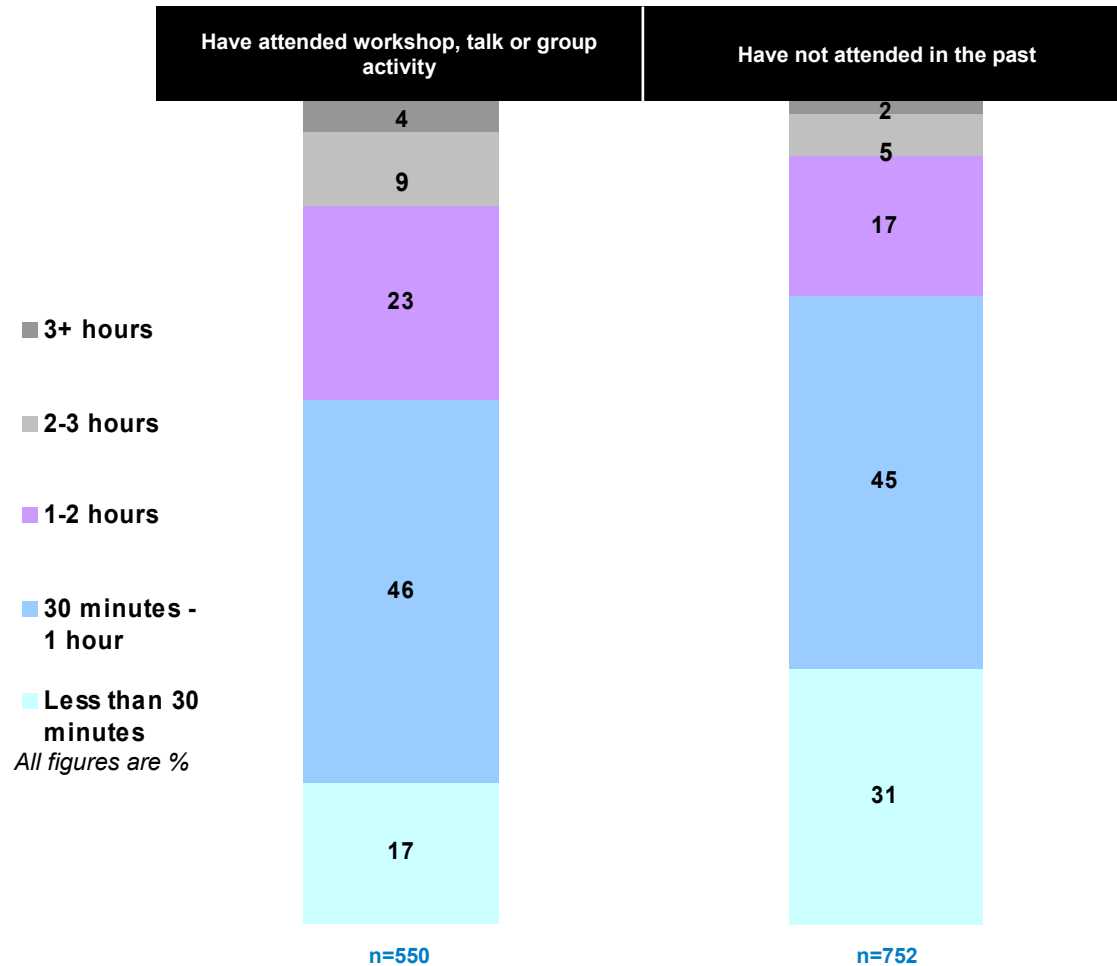
- Visitors who had visited more than 5 times before were more likely to visit the gallery on their own (39%)

Q.23. Thinking about the past 12 months, how many times have you been to a Museum or Gallery in Metro Sydney?

Q3. Who are you visiting with today?

Length of visit

Breakdown by Attendance at Workshop, Talk or Group Activity



- Sydney residents who (or whose family) had not attended a workshop, talk or group activity at the gallery are nearly twice as likely to be making shorter trips (31% vs. 17%)

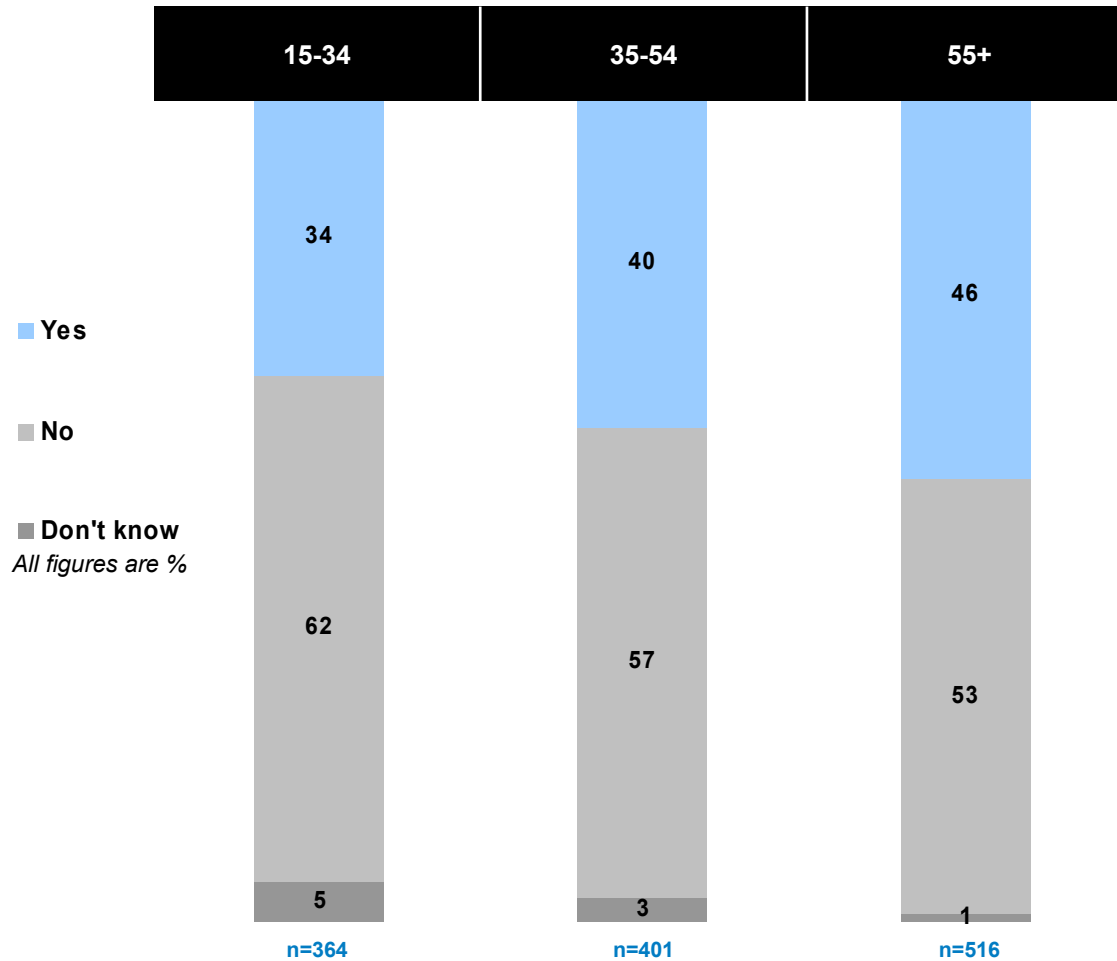
Q.23. Thinking about the past 12 months, how many times have you been to a Museum or Gallery in Metro Sydney?

Q4. How long was your visit today?

SYDNEY RESIDENT REPORT

Attendance at workshop, talk or group activity

Breakdown by Age



Q26. Which of the following age groups are you in?

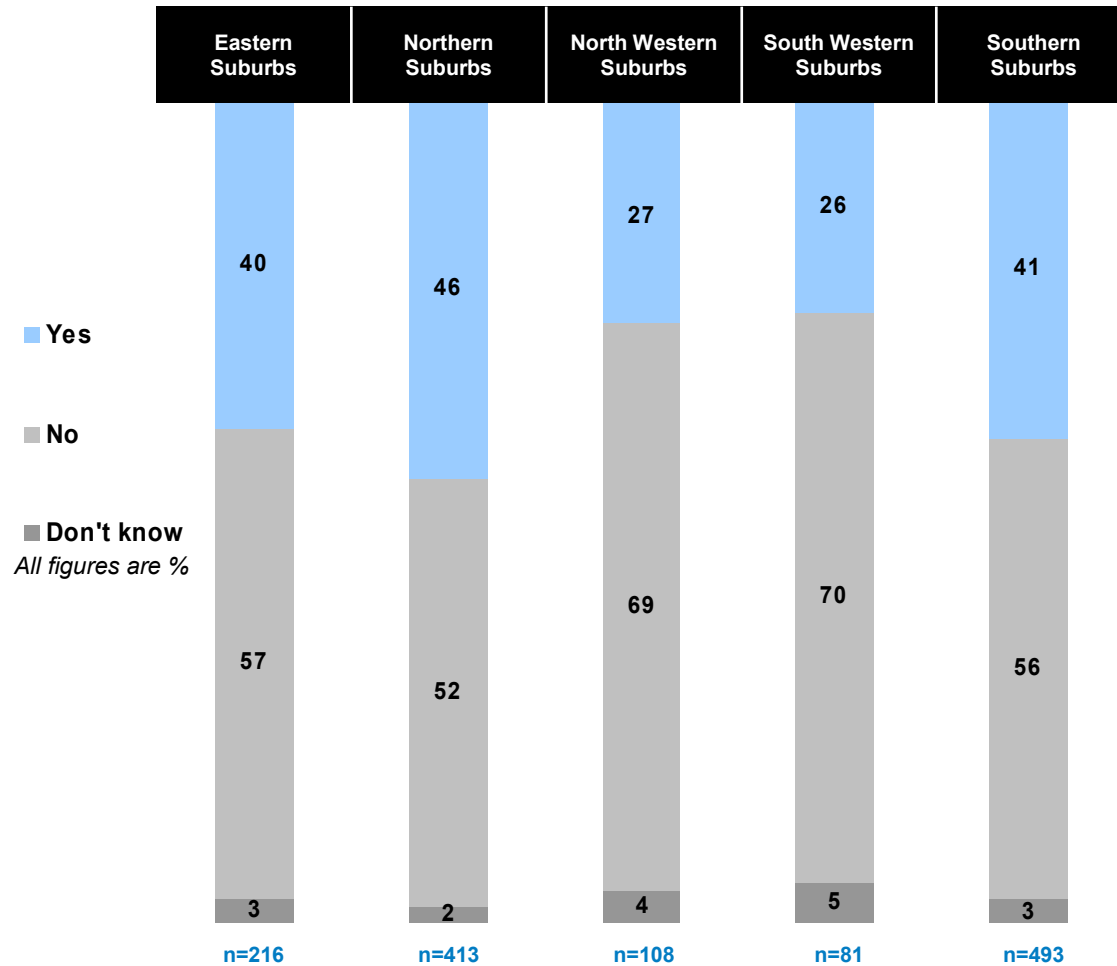
Q5. Have you or any member of your family ever been to a workshop, talk, or group activity at this gallery before today?

Base: Sydney Metro Residents 141

SYDNEY RESIDENT REPORT

Attendance at workshop, talk or group activity

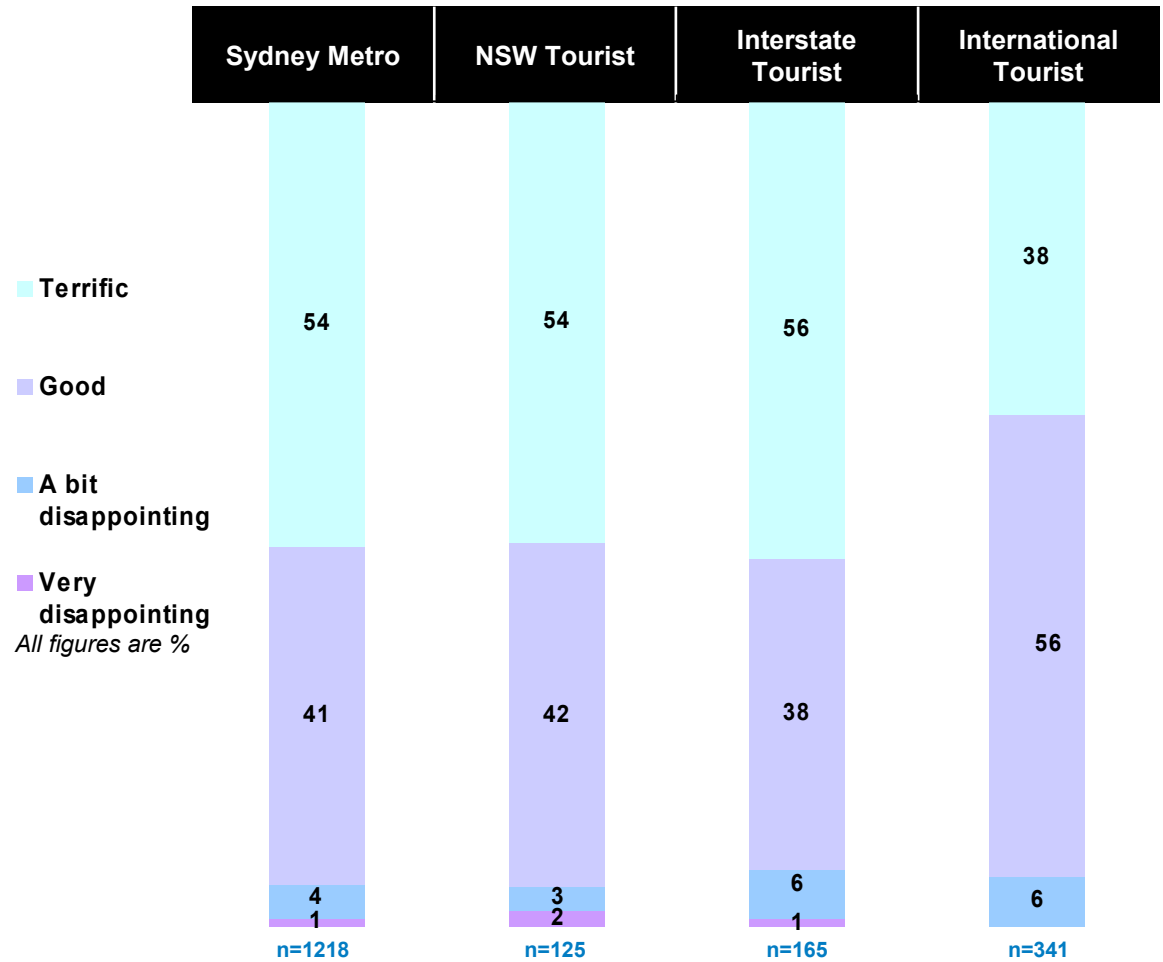
Breakdown by visitor locality

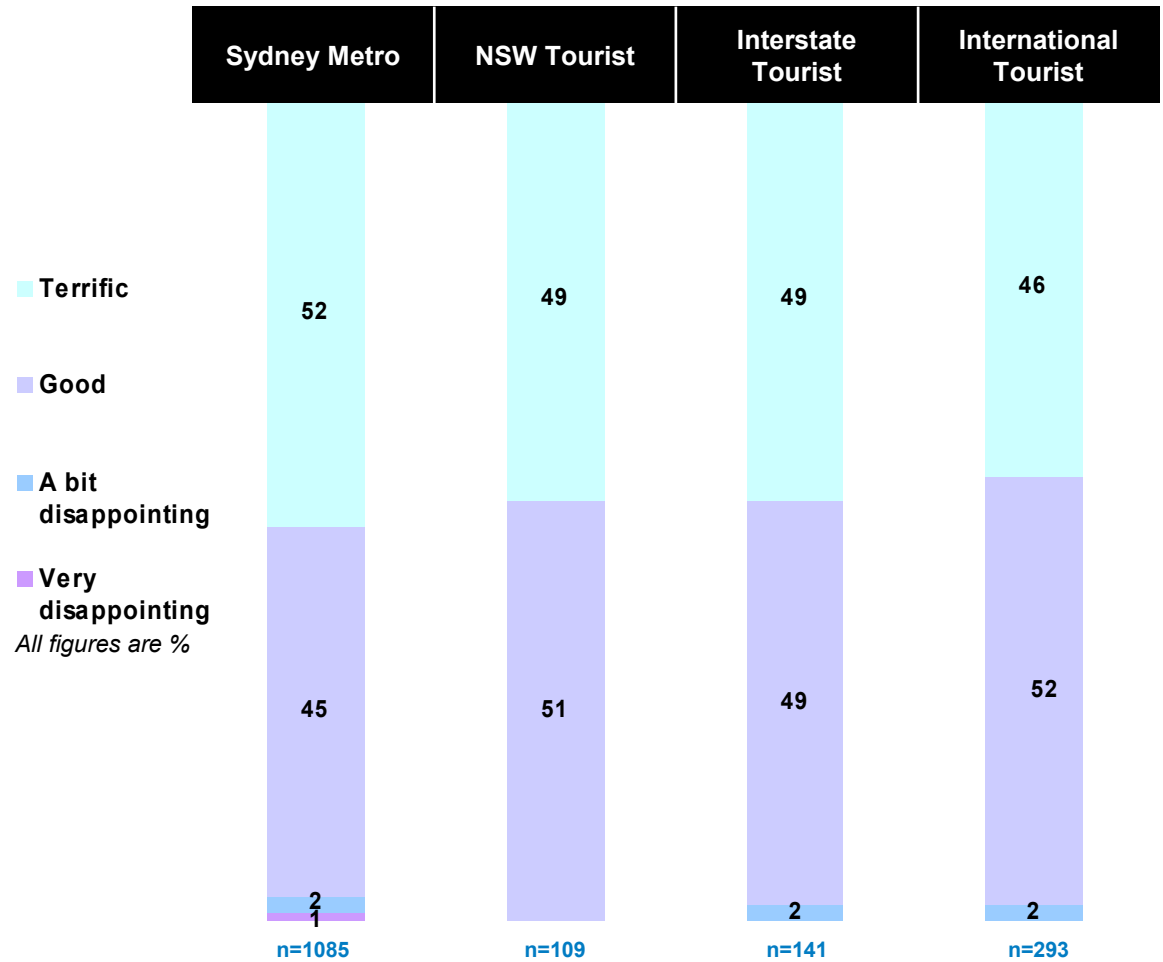


Q16. What is your residential postcode?

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

Base: Sydney Metro Residents 142





Atmosphere/building/ space/garden

