

# Guess Who's Going to the Gallery?

A Strategic Audience Evaluation and Development Study

## Sydney Metro Region Executive Summary



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# M&G NSW

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## 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.

## 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 only 31% living within 5km.

## Executive Summary - Sydney Residents

- **On average, most gallery visitors are female.**
  - As a rule of thumb, around 2 in 3 visitors are female (which is fairly consistent across age levels).
  - Galleries range from 19% male attendance, 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 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%).
  - About 1 in 5 visitors are retirees on average, 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 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 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 Sydney Metro.

## Executive Summary - Sydney Residents

- **On average, 2 in 3 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 recently (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 return visitors return 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 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 32-34% 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.**
  - Workshop, talk, or group activity attendance raises the proportion of those visiting more than 5 times before 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.
- **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 UK (around 1 in 3) or other European countries.**
  - However as the survey was only available in English and so 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.**
  - 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 visitors or their families**
  - Around 2 in 5 (40%) of Sydney residents have attended in the past, and around 1 in 5 (22%) of NSW tourists have attended.

## 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.

## SYDNEY METRO REGION EXECUTIVE SUMMARY

To receive a copy of the full report of findings for the Strategic Audience Evaluation and Development Study please contact:

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