

Guess Who's Going to the Gallery?

A Strategic Audience Development Study



Fact Sheet & Key Findings Year 2 – Sydney Metro Region

Released 12 August 2009

About the survey

Who's involved?

The survey is an initiative of: Museums & Galleries NSW (M&G NSW), the leading agency to develop, support and promote the museum and gallery sector in NSW. M&G NSW receives core funding from the NSW Government through Arts NSW.

This is the second year of the study. The first year of the study focused on twelve public galleries located in Western Sydney and the Hunter/Central Coast regions:

Funded by: The Australia Council for the Arts, the Australian Government's arts funding and advisory body.

Conducted with the participation of: ten galleries in the Sydney Metropolitan region.

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

All galleries have minimum of 7,000 visitors per year.

Steering Committee: includes representatives from Museums & Galleries NSW; the twelve participating galleries; the Australia Council for the Arts; Jones Donald Strategy Partners; the Australian Museum; UTS Shopfront; Australia Street Company and the University of Wollongong.

Project Team: Manager: Michael Huxley, General Manager Finance & Administration, Museums & Galleries NSW. **Senior Researcher** Mackenzie Steele, **Project Coordinator** Kathryn Hamilton.

Statistical analysis and advice: Tony Jones, Managing Partner, Jones Donald Strategy Partners and Katy Alexander, a freelance researcher and past manager of this project.

M&G NSW also acknowledges the advice and assistance of Lisa Andersen, Senior researcher, CAMRA Cultural Mapping Project, UTS.

Method

All research is being conducted under the Code of Professional Behaviour as set out by the Australian Market and Social Research Society (AMSRS).

M&G NSW provided training and support to over 80 staff and volunteers at the twelve participating public galleries in the distribution of a standardised paper questionnaire to visitors over two survey periods.

Overall there were 2239 responses collected between August 2008 and February 2009.

The completed questionnaires were sent back to M&G NSW for data entry and analysis.

Individual reports have been produced for each participating organisation in addition to the regional reports made available to the public on the M&G NSW website.

What next?

With continued funding from the Australia Council the third stage of the study will complete the benchmarking process across the remaining 14 Public Galleries in NSW.

By the conclusion of the program over 30 galleries across NSW will have been included in the study. Over 7,000 completed visitor surveys will result in the first state wide benchmark of gallery visitors. This information will then be used to contribute to the nationwide audience data and visitor information collection enterprise (ADVISE) research into Arts audiences being run by the Australia Council.

Where can I obtain a copy of the report?

The regional report/s are available in PDF on the Museums & Galleries NSW website at www.mgnsw.org.au.

Key findings

The diversity of Sydney galleries is reflected in the diversity of their audiences

The combination of regional and specialist galleries located in the Sydney Metro Region, as well as major cultural institutions, gives rise to a diverse and vibrant gallery audience in terms of place of residence, age and gender and these factors differ widely from gallery to gallery.

- Non Sydney Residents (Tourists) made up 30% of survey respondents. This varies from gallery to gallery peaking at 60% with the smallest percentage being 11% tourists.
- Retirees make up around 1 in 5 visitors overall, but this also differs widely amongst galleries (from 4% to 40%).
- Galleries differ widely in the proportion of full-time workers they attract (65% to 16%).
- Men make up 33% of audiences but this varies when place of residence is considered. For example, of the audiences living in the Eastern Suburbs , 41% are male.

Sydney Metropolitan Galleries are an important tourist destination

All the Sydney Metropolitan galleries have a noticeable proportion of visitors who are tourists, i.e. those who don't live in the Sydney Metropolitan area. Tourists and Sydney residents cite different reasons for their visit.

- Over 30% of the total respondents are non Sydney Metro residents.
- Tourists are much more likely to cite the general collection as a motivator for their visit (62%) than Sydney residents (29%).
- Sydney residents are more likely to cite special exhibitions as a motivator for their visit. (59% Vs 25%).
- This is a significant variation from the results for the Western Sydney and Hunter/Central Coast Regions where tourists were not a major part of the audience.

Local regional galleries connect strongly with a local audience

Over 30% of audiences live within the same Local Government Area as the gallery they visited.

- Overall 54% of Sydney Metro residents live within 5 Km of the gallery they visited.
- 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. 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.

Continued Over

Galleries offer an accessible form of cultural activity and entertainment regardless of, age, income, education and work commitments

- The age of gallery attendees is distributed evenly across all surveyed age groups. 33% of those surveyed are aged 15-34, 33% are aged 35-54 with the remaining 37% aged 55 and over.
- The income distribution for gallery visitors resident in the Sydney Metro region is relatively proportional to ABS data. 36% of respondents are earning \$40,000, 18% of respondents are earning \$40-\$60,000, 24% of respondents are earning 60-100K and only 22% of respondents are earning over \$100,000.
- All levels of educations are represented amongst gallery visitors resident in the Sydney Metro region. 14% of respondents reported their highest level of education as high school, 10% of respondents reported their highest level of education as TAFE, with 25% reporting undergraduate and 26% reporting postgraduate degrees.
- More than half of all visitors are employed either full or part time. Full time students (aged over 15) represented 12% of attendees with retirees representing as 20% of gallery visitors resident in the Sydney Metro region. (N.B. – school groups were not surveyed for this study).

Galleries attract significant new audience numbers as well as building a loyal and regular audience

There appears to be a segment of visitor population who are “serial gallery-goers”

- Of visitors who are Sydney residents, almost one quarter are attending the gallery for the first time. When Sydney residents return, they are most likely to return many times, rather than only once or twice.
- Of those who had visited the gallery before, almost half (28%) had visited that gallery more than 5 times.
- Of those who have visited other galleries in the region, 79% of them had done so in the in the last 6 months.

Galleries provide a highly satisfying recreational activity

Satisfaction rates were high with 97% expressing satisfaction at their overall gallery experience

- 48% of Sydney Metro residents described their overall visit as “terrific”, while 49% described it as “good”.
- 98% of tourists rated their experiences as good or terrific.
- 95% Sydney Metro residents rated exhibitions as good or terrific.
- The friendliness of staff was rated very highly by Sydney Metro residents.

Galleries attract and connect with culturally diverse communities

Slightly more than one in five visitors who live in the Sydney Metro region area speak a language other than English at home

- This figure of 22% of visitors to Sydney metropolitan galleries who reside in Sydney compares with 20% of those who visit galleries in Western Sydney and 9% of those who visit galleries in the Hunter/Central Coast Region.
- A wide range of languages are spoken at home for Sydney Metro gallery visitors with over 40 languages identified .
- 2% of visitors who reside in Sydney identify as Aboriginal. This compares to 1% for Sydney statistical regional).

- ENDS -