

M&G NSW

Guess Who's Going to the Gallery?

**A Strategic Audience Evaluation and
Development Study for Galleries in NSW**

**Year 2 – Sydney Metro Region
Abridged Report**



Australian Government



Key Funding Partner
The Australia Council for the Art
Market Development, National

About this report.

This report is an abridged version of the Sydney Metro Region *Guess Who's Going to the Gallery?* Report.

It is designed to be used by people who would like to have an overview of the audiences who attend the ten participating galleries located in the Sydney Metropolitan regional but who may not need the in-depth analysis provided by the full Sydney Metro Region *Guess Who's Going to the Gallery* Report.

It includes:

- an abridged background and notes on methodology
- a selection of the findings and selected graphs
- a summary of the key facts and findings

It does not include:

- the full conclusions of the report
- the full tourist report
- the recommendations
- Information about future research

For a fuller understanding of these audiences readers are encouraged to read the full report. The report can be obtained by contacting Museums & Galleries NSW +61 2 9358 1760 or info@mgnsw.org.au

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Introduction

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 consist methodology. Following the outcomes from the scoping study, in May 2007, M&G NSW commenced the *Strategic Audience Evaluation and Development Study for Galleries in NSW* with core project funding from the Australia Council for the Arts. The study set out to provide benchmark information on gallery audiences, their demographics, actions, attitudes, limitations and needs with 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 summary report outlines 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.

The galleries who participated in the second year of the *Strategic Audience Evaluation and Development Study* are: 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) and the National Trust S.H. Ervin Gallery.

M&G NSW will continue the *Strategic Audience Evaluation and 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.

The full comprehensive report is available from Museums & Galleries NSW on CD

The research team would like to thank: Katy Alexander, all the participating gallery directors and their staff, Kim Hanna and Bow Campbell from the Australia Council for the Arts, Tony Jones for his invaluable insights and generous assistance and the members of the Audience Evaluation and Development Steering Committee and the volunteers who worked on the project.

Key Funding Partner
The Australia Council for the Arts
Market Development, National



M&G NSW gratefully acknowledges core funding from Arts NSW

Research Partners



The project team for the second year of the study are: Maisy Stapleton, *CEO – M&G NSW*, Michael Huxley, *General Manager, Finance & Administration- M&G NSW*, Matthew Mackenzie Steele, *Senior Researcher, Research & Audience Development M&G NSW*, Kathryn Hamilton, *Coordinator, Audience Development M&G NSW*, Data entry management - Karen Cooke *Ekas Market Research Services* and Tony Jones, *Managing Partner, Jones Donald Strategy Partners*

The steering committee for the second year of the *Strategic Audience Evaluation and Development Study* is: Chair – Michael Huxley *General Manager, Finance and Administration M&G NSW*, Maisy Stapleton *CEO M&G NSW*, Lisa Andersen: *Senior Researcher, CAMRA Cultural Mapping Project, University of Technology Sydney*, Sue Boaden: *Director, Australia Street Company*, Kim Hanna: *Manager, National Audience Development, Australia Council for the Arts*, Bow Campbell: *Program Officer, National Audience Development, Australia Council for the Arts*, Tony Jones: *Managing Partner, Jones Donald Strategy Partners*, Dr Lynda Kelly: *Head of Audience Research, Australian Museum* and Professor Amanda Lawson: *Dean, Faculty of Creative Arts, University of Wollongong.*

Study Aims

The overall objective of the Study is to provide factual and reliable data about audiences for the museum and gallery sector. The data presented is intended to act as a **benchmark**, and as a **guide future for research** opportunities.

In turn, 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

Methodology

The questionnaire is a standardised self-complete paper survey that was designed for use in all the participating galleries. Training was provided to gallery staff and volunteers at each participating gallery in administering the questionnaire during two allocated survey periods commencing in August 2008 and concluding in February 2009. Each survey period ranged from 2 weeks to 2 months, depending upon rates of visitor attendance and staff resources. A total of 2239 responses were collected across the 10 participating galleries.

The sample was drawn from visitors 15 years or older. As the questionnaire was not designed for educational visits school children and teachers attending in groups were not surveyed. A maximum of 2 people were surveyed in any one tour group. As the standardised questionnaire was only available in English, visitors who are not fluent in English may be under represented.

Report Structure

Residents vs Tourists

In this study, 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 as people who live outside of the Greater Sydney Metropolitan area. The behaviour, attitudes and needs of tourist audiences vary significantly from those of Sydney residential audiences.

As a result of this the report is in two sections

The Sydney Metro Residents Report is the major section of the report and excludes tourists to focus solely on the population of Sydney Metro residents i.e. those who reside in the Greater Sydney Metropolitan area.

The Non-Resident or Tourist Report looks at the differences between Sydney Metro residents and tourists of different types: NSW, interstate and international.

Weighting

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

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.

However in the Tourist Report, the tourist types (NSW, interstate and international) remain un-weighted.

Notes 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 This may 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 galley 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

Study Findings

Sydney Residents Report

Visitor Demographics

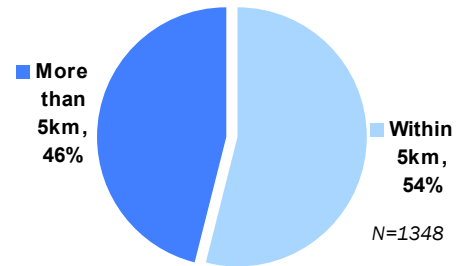
Galleries in Sydney Metro have very different audience profiles.

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.

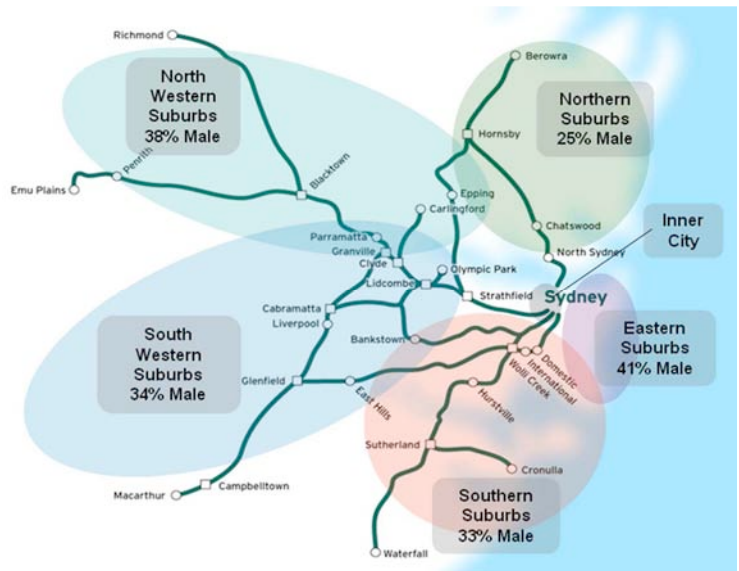
The distance Sydney residents live from the galleries varies extensively.

Some galleries have 70% of visitors living within 5km of the gallery, whereas others have 31% living within 5km of the gallery.



On average, most gallery visitors are female.

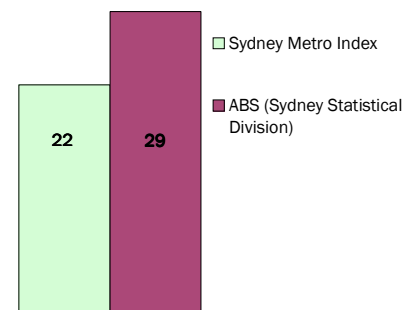
As a rule of thumb, around 2 in 3 visitors are female. This is fairly consistent across age levels. Male audiences at individual galleries range from 19%, up to a nearly even gender split (49%). Visitors who reside in the Northern suburbs are more likely to be female (75%), whereas visitors from the Eastern suburbs tend to display a more equal gender balance (59% female)



Base: Sydney Metro

Galleries are connecting to a culturally-diverse audience who live in Sydney

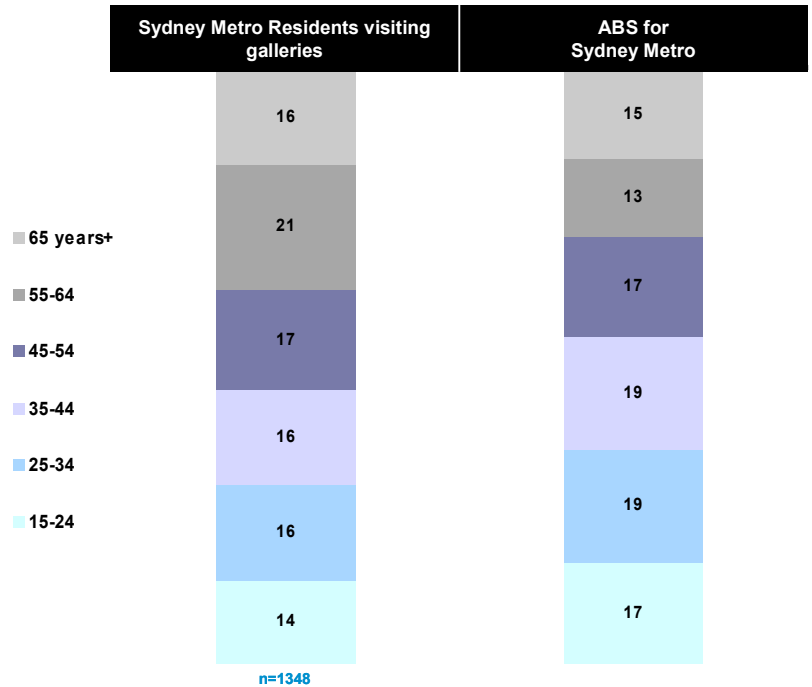
Around 22% of gallery visitors surveyed speak a language other than English at home. This compares with 29% for the ABS Sydney statistical region. It likely that the actual proportion is higher when you consider the questionnaire was only available in English



Base: Sydney Metro Residents

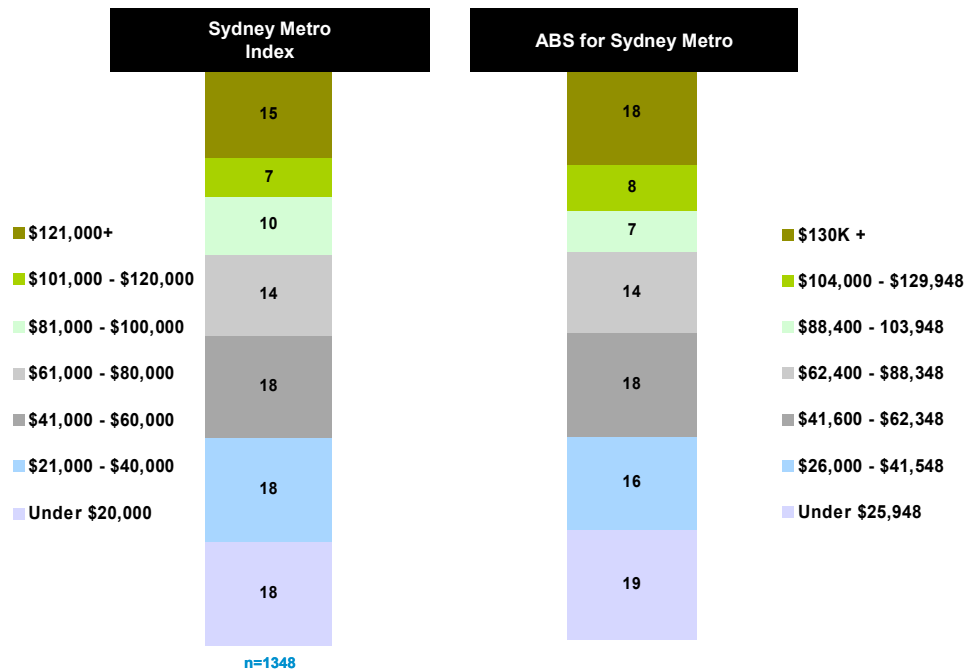
On average, Sydney resident visitors are *slightly* older than what would be expected from the general population of Sydney residents.

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%)



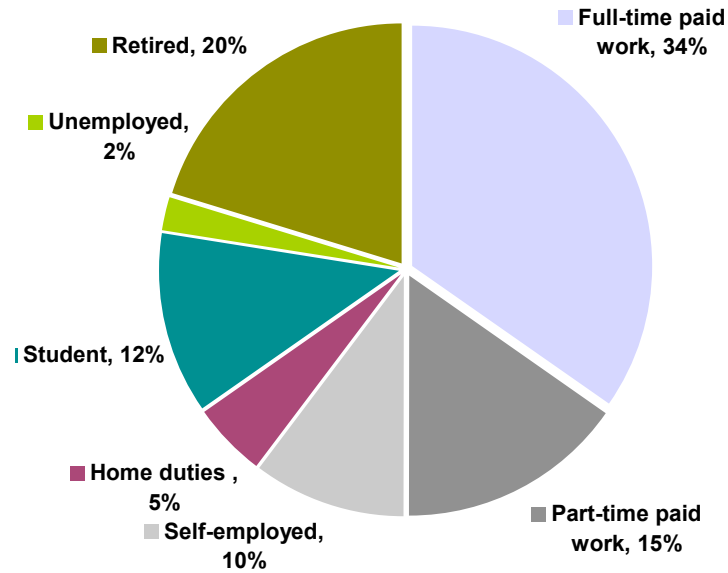
Income is roughly in line with ABS statistics for Sydney Statistical Division for the average of Sydney Metro

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.



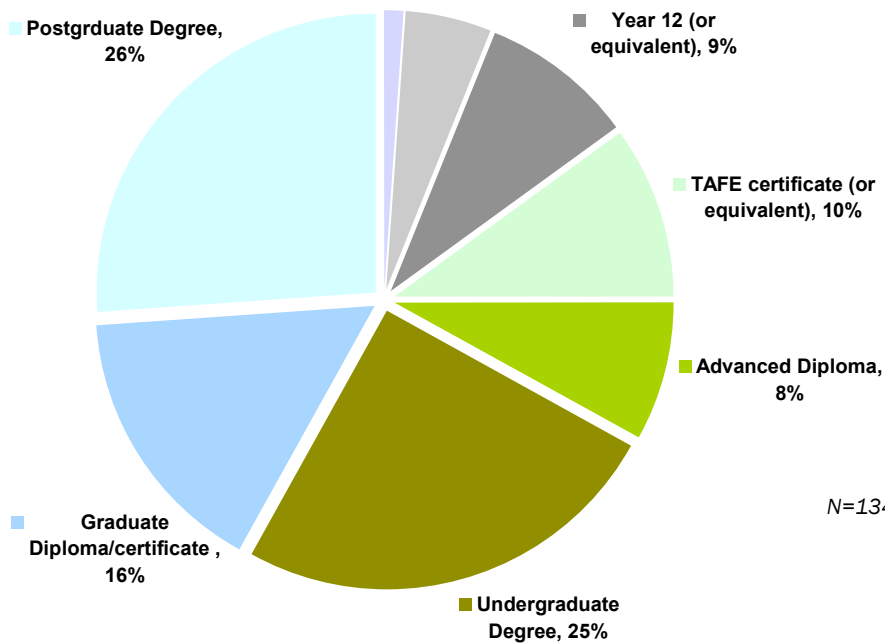
About half of Sydney resident visitors identify as “working” and around 1 in 3 are full-time workers.

The number of full-time workers varies from 65% (around 2 in 3) to 16% (around 1 in 7) between individual galleries.



N=1348

All levels of education are represented in the gallery audiences



N=1348

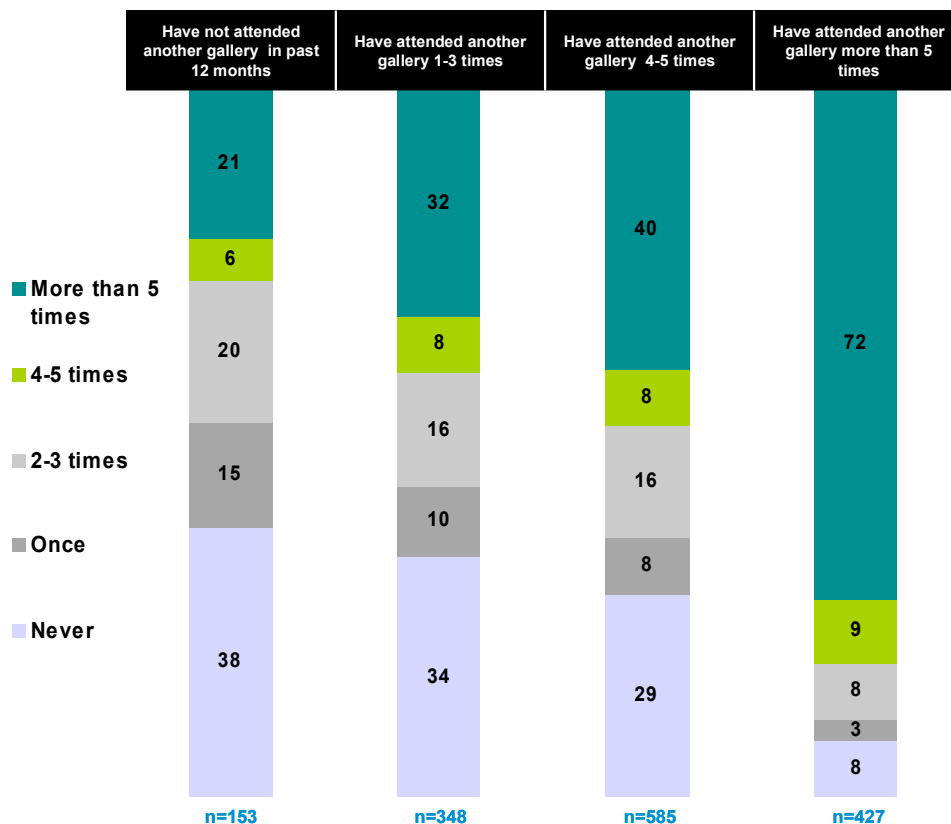
Visitor Behaviour

On average, around 1 in 2 visitors 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.



On average, 2 in 3 visitors had returned to the gallery of their survey within the last 6 months

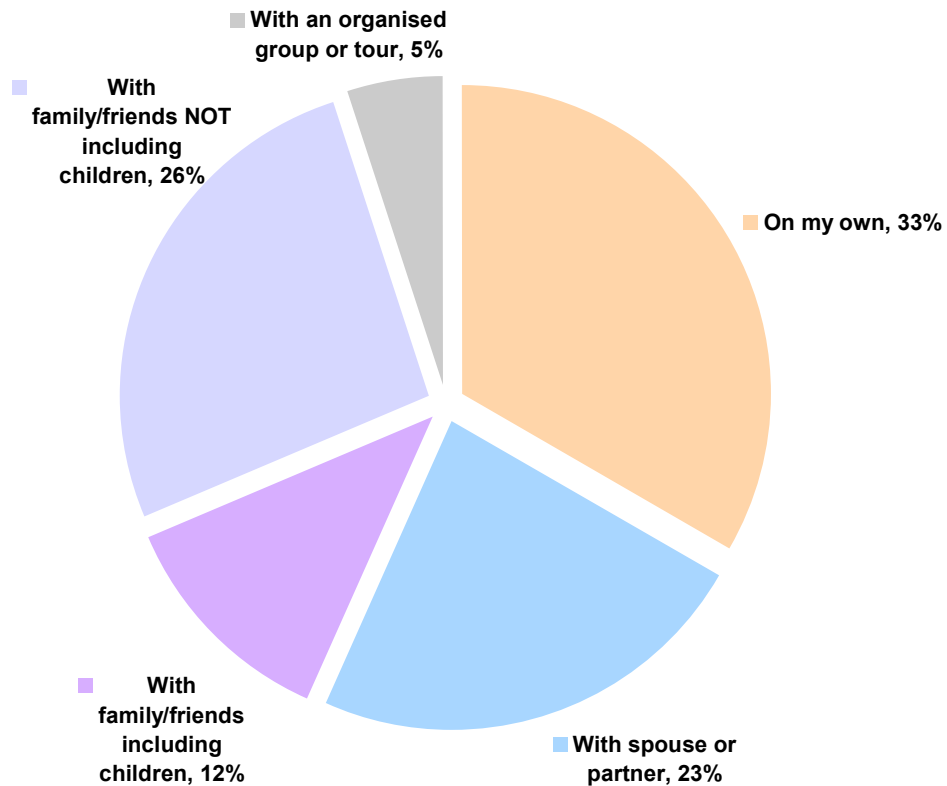
The proportion of Sydney residents returning within the last 6 months varied from 52% to 83%. Younger Sydney resident visitors are more likely to have visited within the last 6 months. Sydney resident visitors who live closer to the gallery (within 5 km) are also more likely to have revisited within 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%).

About 1 in 3 Sydney residents visit the gallery on their own

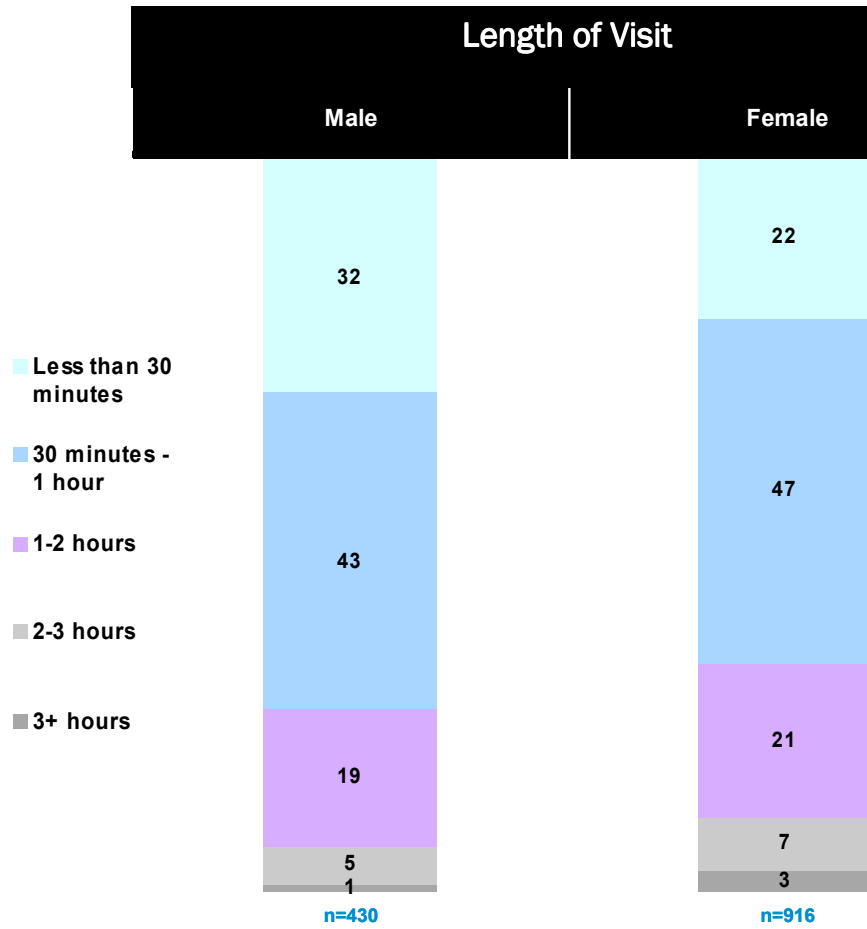
The proportion visiting on their own varies between galleries from 17% to 51%. Certain groups are more likely to visit on their own: Male visitors, visitors in the 25-34 age category, those who live closer to the gallery, and those who had already attended the gallery more than 5 times before.



Base: Sydney Metro Residents

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 year of age) 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.



Information, Interests and Motivations

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

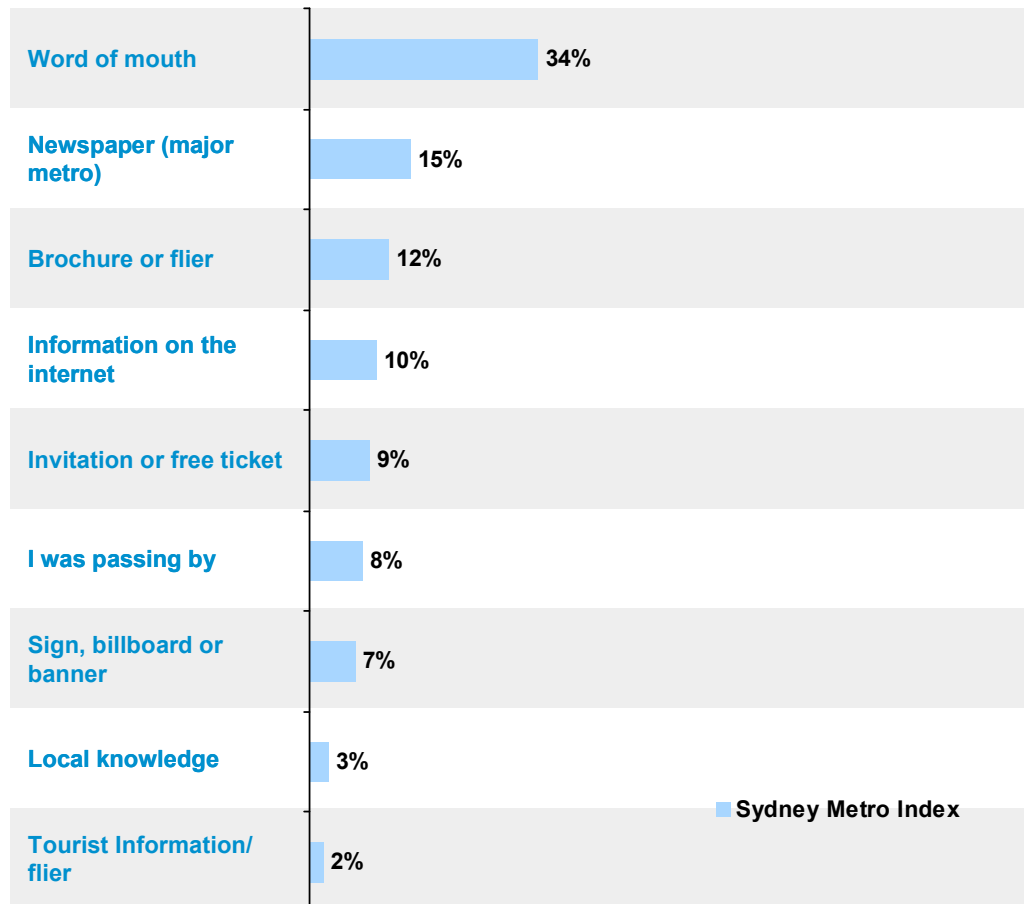
Attendance at a workshop, talk, or group activity raises the proportion of those visiting more than 5 times to 76% (or around 3 in 4). Similarly, workshop, talk or group activity attendance raises the proportion of return visitors who had returned within the last 6 months to 81% (or around 4 in 5).

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.

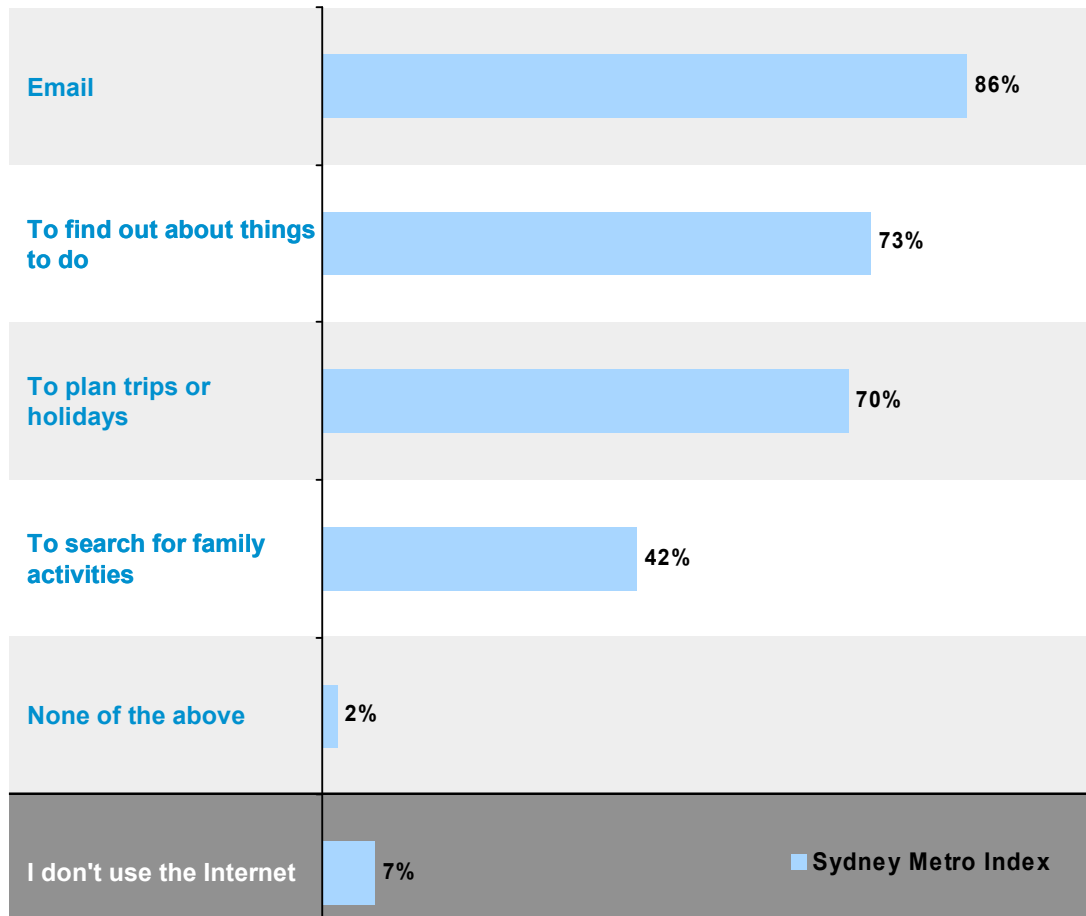
Metro newspapers were cited to varying degrees (from 3% to 45% of Sydney resident visitors) as were local papers (from 0% to 21% of all Sydney resident visitors). Galleries whose visitors cited local papers highly were less likely to cite metro papers, and vice versa.



Base= Sydney Metro Residents

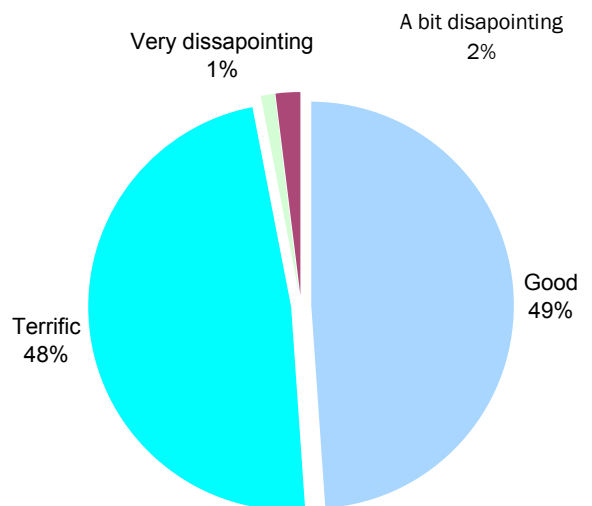
Most visitors are online (93%) and about 3 in 4 overall are using the internet to “find out about things to do”

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



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).



Tourist Report

Notes about the data and comparisons with the Sydney Metro Index in the Tourist report.

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 report, the data for each gallery is weighted to reflect the contribution that particular gallery makes to the total pool of tourists. 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.

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

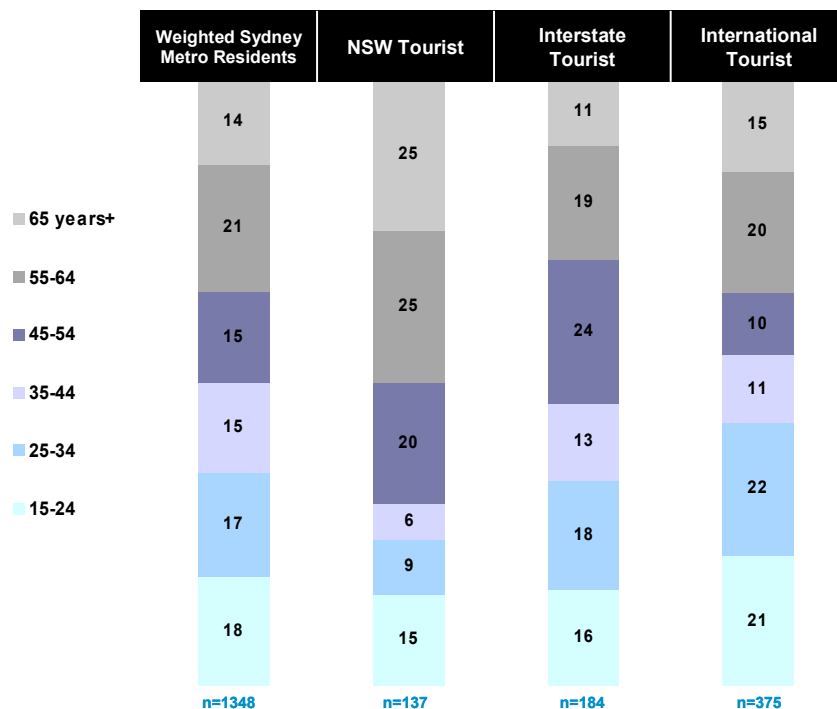
However, as the survey was only available in English, non-English speaking tourists may actually be higher than what is reported by this study.

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.



The gender split is constant between Sydney Metro residents and tourists (2 in 3 female)

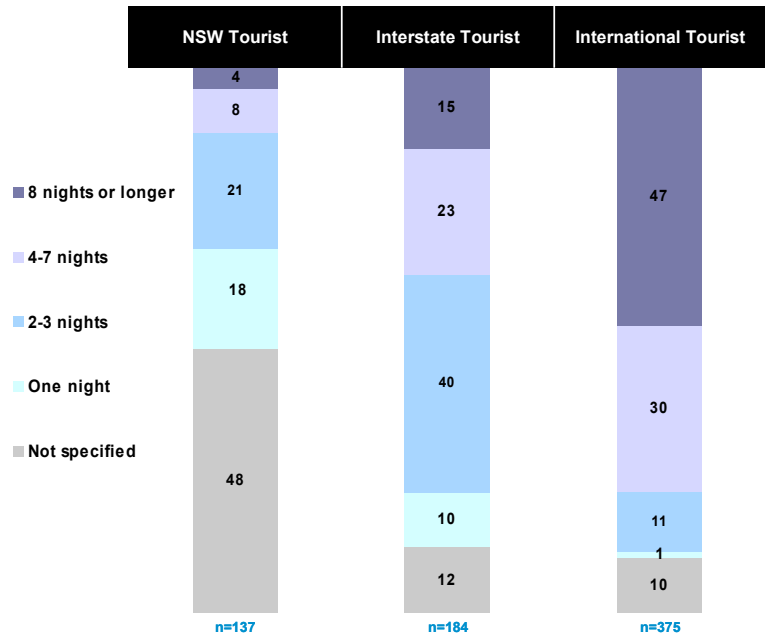
However international tourists show a slightly more even gender split (at 40% male).

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).

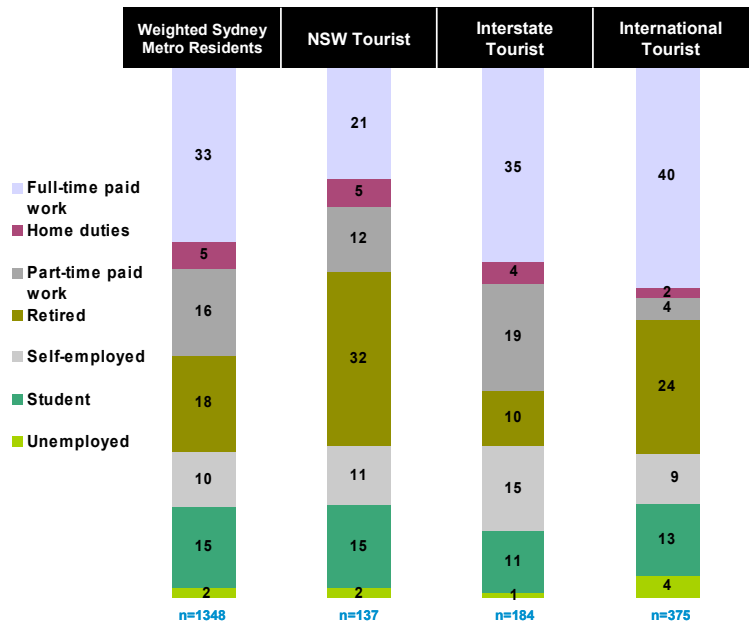
The further tourist visitors live from Sydney, the more likely they are to be spending longer in Sydney

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.



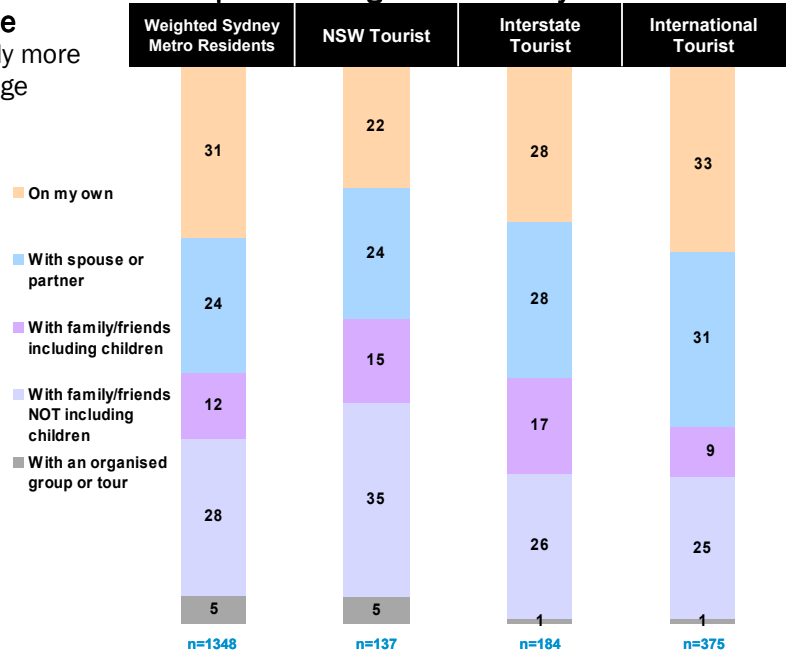
NSW tourists compared to interstate and international tourists

NSW tourists are likely to have lower gross annual household incomes, are less likely to have a tertiary qualification, & are less likely to be staying overnight in Sydney.



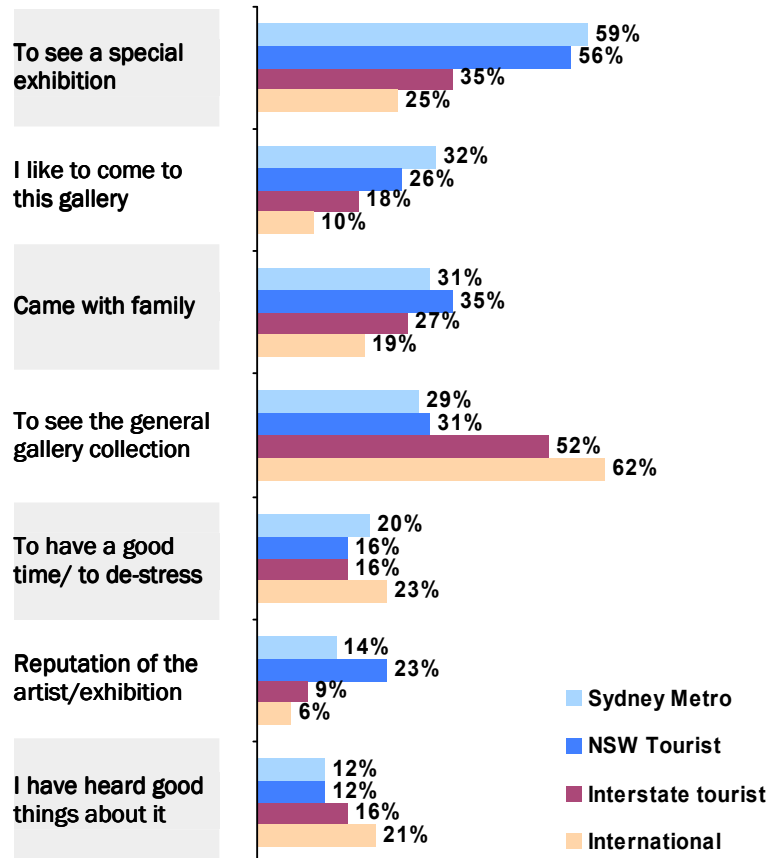
Who they visit with and the length of time visitors spend in the galleries is fairly similar for tourists and Sydney residents alike

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.



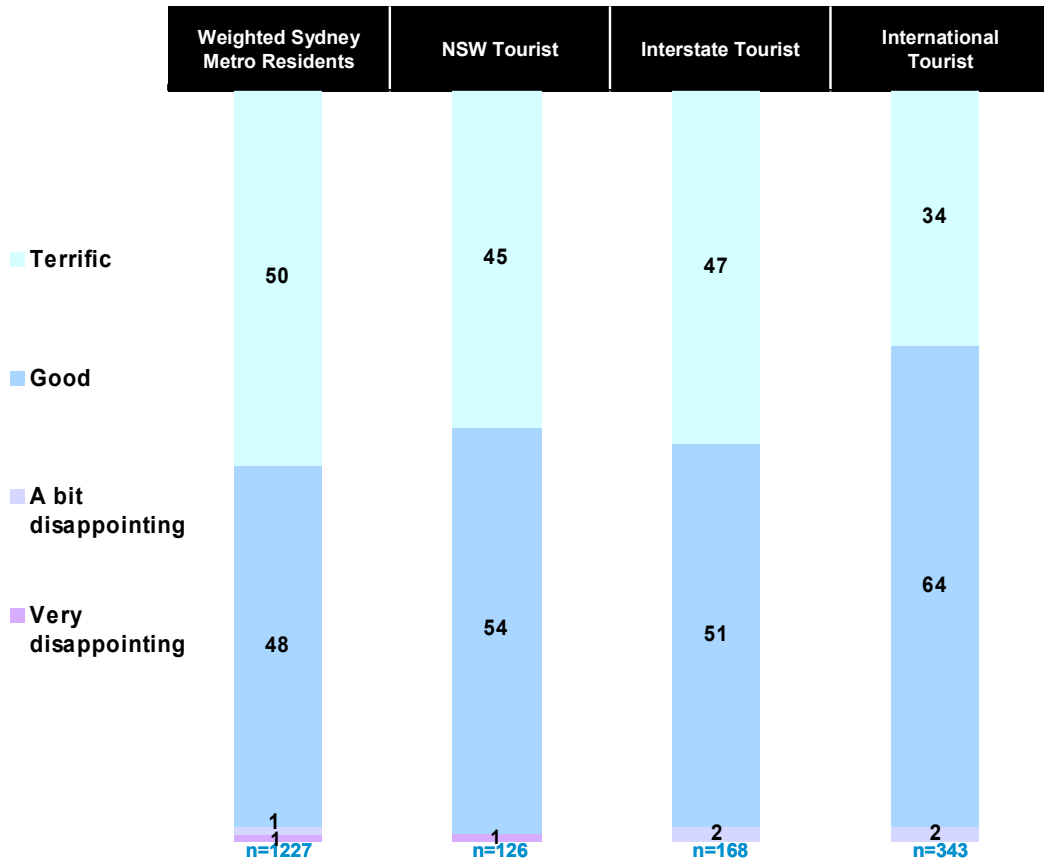
Base
 Sydney Metro Index n=1348
 NSW Tourist n=137
 Interstate Tourist n=184
 International n=375

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.

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.



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, ie 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 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 significant part of the audience

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. (Nb – school groups were not surveyed for this study)

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

Galleries attract a 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