

Guess Who's Going to the Gallery?

A Strategic Audience Development Study for Museums and Galleries in NSW



Photo courtesy of Newcastle Region Art Gallery.

**Comprehensive
Findings**

Regional Report

**Western Sydney
& Hunter**

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M&G NSW

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Australian Government



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Table of Contents

INTRODUCTION	Page
▪ Acknowledgements	4
▪ Funding Partners	5
▪ Background	6
▪ Study Aims	11
▪ Methodology	14
▪ Participating Museums and Galleries	16
▪ Executive Summary	17
▪ Project Team	24
▪ Steering Committee	25
▪ Note on Reading Charts	26
STUDY FINDINGS	
▪ Visitor Demographics	27
▪ Visitor Behaviour	46
▪ Information, Interests & Motivations	72
▪ Satisfaction and Feedback	89
▪ Conclusions and Recommendations	99

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- The members of the Audience Development Steering Committee.
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- Richard Mulvaney, former General Manager - Business & Administration, Museums & Galleries NSW.
- Andrew Paul from Jones Donald Strategy Partners.
- Staff at Western Sydney Region of Councils (WSROC).

Funding

Key Funding Partner
Market Development, National



Research Partners

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StrategyPartners



M&G NSW

Background



Whiteley Gardens, Photographer Allan Chawner. Photo courtesy of Newcastle Region Art Gallery.

Background

- In May 2007, Museums & Galleries NSW (M&G NSW) commenced the *Strategic Audience Development Study for Galleries and Museums in NSW*.
- The study set out to provide benchmark information on museum and gallery audiences, their demographics, actions, attitudes, limitations and needs.
- 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.
- All participating museums and galleries are publicly funded organisations, open to the public at least 5 days a week, with at least 7000 visitors per annum.
- Research began in August 2007 and concluded in March 2008, with 2259 responses collected across the two regions.
- Results are being delivered in two ways. Each participating museum/gallery will receive a detailed and confidential individual report on their organisation's data. The comparative regional report groups data by region, combining results for all 5 Hunter/Central Coast organisations and all 7 organisations in Western Sydney.
- M&G NSW will continue the *Strategic Audience Development Study* with an additional 20-30 galleries during 2008 - 2010, for a comprehensive overview of visitors across NSW, with key funding from the Australia Council for the Arts.

Background

- Research commissioned by M&G NSW into the NSW regional gallery sector in 2005, revealed that many regional museums/galleries undertake little or no formal visitor research. Many museum/gallery directors expressed strong interest in visitor research, but reported lacking the resources, time, and/or skills to conduct formal visitor research at their gallery/museum.
- At its most basic level, visitor research involves the collection of information; the analysis of this information in context; the reporting of both the results and their implications; and, arising directly from those implications, recommendations for actions. In the cultural sector, evaluation is especially important in ensuring that educational facilities, exhibition and public programs, and services meet visitors' needs, as well as management targets and goals.
- To date in NSW, there had been no consistent or systematic development of indicators and statistics of value across the statewide gallery sector that could be used to prompt and inform policy decisions, programming, or organisational objectives. Collecting reliable data is the very first step in an effective visitor research and evaluation program that feeds into a regional and statewide planning process.

Background

- In 2006, M&G NSW proposed a benchmarking initiative to standardise the collection of audience data and its analysis in the NSW sector.
- In February 2007, M&G NSW received funding from the Community Partnerships and Market Development Division of the Australia Council to conduct the pilot study: *Cultural Intelligence – a Strategic Audience Development Study for Galleries & Museums in Regional NSW*.
- The *Strategic Audience Development Study*, currently being undertaken by M&G NSW, has provided a pilot for standardised, quantitative gallery & museum visitor research in NSW, adhering to standards set out by the Australian Market & Social Research Society.
- Preliminary research for the study showed that only one gallery, out of the 12 participating galleries and museums, conducts visitor research with any regularity. Some galleries and museums reported never having conducted any formal visitor research at their organisations, while many had done visitor research sporadically, without using it as an integral part of strategic planning.
- The study aims to encourage the growth of research and audience development skills within regional galleries and museums, as well as an increased understanding of research tools, methods and standards.

Background

- Challenges facing regional galleries in relation to visitor research:
 - Lack of financial resources: no budget to obtain professional consultation on designing survey methodologies, no budget to assist with data processing and reporting.
 - Lack of knowledge/expertise: lack of in-house knowledge in questionnaire design, research methodology, data interpretation and presentation.
 - Lack of human resources: visitor surveys need some staff administration, and in some gallery environments this may be challenging to achieve with regular staff and volunteers on a systematic ongoing basis.
- The *Strategic Audience Development Study* addresses these problems in the following ways:
 - Lack of financial resources: the study provided a budget for professional consultation on designing survey methodologies, data processing, statistical analysis and reporting.
 - Lack of knowledge/expertise: the study provided senior gallery staff with greater knowledge of the benefits of undertaking visitor research and the processes involved.
 - Lack of human resources: staff and volunteers were trained in basic visitor research and provided with all necessary survey materials.

Study Aims



Students from Lochinvar Public School. Photo courtesy of Maitland Regional Arts Centre.

Study Aims

Intended outcomes of the study encompass:

For funding bodies/policy development:

- competent quantitative data about contemporary audiences for art galleries.
- an Australia-wide model for audience research developed and tested.

For the Museum and Gallery sector:

- the development of an audience-focused culture and the resources and skills to support effective audience research and development.
- an understanding of contemporary audiences to maximise attendance and engagement programs.

Study Aims

The primary aim for the *Strategic Audience Evaluation and Development Study* is:

- To coordinate the provision of current data and market intelligence for the sector, to allow a clear understanding of the actions, attitudes, access and attributes of contemporary audiences.

The specific aims are:

- Increased resources and skills within galleries to support effective audience research and development.
- Evidence-based audience development strategies for small to medium sized public galleries.
- To support an Australia-wide network of audience data collection in partnership with the sector and funding bodies.
- Provision of a benchmarking system.

Methodology

- A standardised self-complete paper survey was designed for use in all the participating museums/galleries.
- Training was provided to staff and volunteers at each participating museum/gallery.
- Staff 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 resourcing.
- Research began in August 2007 and concluded in March 2008.
- 2259 responses were collected overall:
 - 1163 across the 7 Western Sydney organisations.
 - 1096 across the 5 Hunter organisations.

Methodology

Who we interviewed:

- 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.

Participating Museums and Galleries

▪ **The Hunter/ Central Coast Region**

- Gosford Regional Gallery & Arts Centre
- Lake Macquarie City Art Gallery
- Maitland Regional Art Gallery
- Muswellbrook Regional Art Centre
- Newcastle Region Art Gallery

▪ **The Western Sydney Region**

- Blacktown Arts Centre
- Campbelltown Arts Centre
- Fairfield City Museum and Gallery
- Hawkesbury Regional Gallery
- Liverpool Regional Museum
- Parramatta Heritage Centre
- Penrith Regional Gallery & Lewers Bequest

NB: Newcastle Regional Museum was unable to participate due to closure for renovations

Casula Powerhouse had not re-opened at the time of surveying

Executive Summary



Artist Bridget Nicholson presents a talk on her installation *Hold*, in February 2008. Photographer Brad Franks.
Photograph courtesy of Muswellbrook Regional Arts Centre.

Executive Summary

Key Findings:

Galleries and museums offer an accessible form of cultural activity and entertainment

Visitor demographics show that a large proportion of visitors are not necessarily high income earners, nor are they achieving the highest levels of education, or working full-time.

- About a quarter of visitors earned less than \$20K a year, and nearly half earned less than \$40K a year. In fact, only 1 in 10 visitors had a gross household income over \$100,000.
- Regional galleries may provide an important social and cultural resource for those who are not in full-time employment. Less than one third of visitors were in full-time paid work.
- There is a good spread of education levels across visitors in both the regions surveyed.
- Older age groups are over-represented in both regions.

Executive Summary

Key Findings:

Galleries and museums appeal to a diverse community

Galleries and museums in the two regions studied were providing programs and exhibitions to offer experiences and resources to diverse audiences.

- Indigenous people are well-represented as visitors to galleries and museums in regional areas, particularly in Western Sydney.
- People from non-English speaking backgrounds make a fair segment of Western Sydney visitors, with around 1 in 5 visitors speaking a language other than English at home.

Executive Summary

Key Findings:

Galleries and museums are attracting a significant number of first-time visitors, and have a high number of repeat visitors

First-time visitors represent over one quarter of visitors in the Hunter and over one third of visitors in Western Sydney. When visitors return, they are most likely to return many times, rather than only once or twice.

- 44% in the Hunter and 30% in Western Sydney had visited that museum or gallery over 5 times before.
- Around half of visitors in both regions had visited the gallery within the past 6 months, with over one quarter of those visiting within the past month. Around one quarter had visited more than a year ago.
- Around 10% of respondents in Western Sydney and 18% of respondents in the Hunter were visitors to the region.

Executive Summary

Key Findings:

Galleries and museums represent a genuine recreational alternative amongst visitors, who report a high level of satisfaction with their experience

The motivation for visiting a museum or gallery in Western Sydney is most likely to involve an interest in a special exhibition or an outing with family or friends. In the Hunter, gallery loyalty and familiarity are additional reasons for visiting. Almost all respondents enjoyed their overall visit.

- Around 1 in 2 visitors said their main reason for visiting was to see a special exhibition, while close to a third wanted to visit with the family. In the Hunter, 41% came to see the general museum or gallery collection.
- Satisfaction rates across both regions were high, with less than 2% expressing disappointment at their overall museum or gallery experience.

Executive Summary

Key Findings:

Areas of lower visitor representation

- Women comprised at least two thirds of audiences across both regions, with gender proportions similar across all age groups. Only one gallery from each region had male audience representation of 40% or more.
- Older age groups were over-represented across both regions. Younger independent visitors are under-represented in Western Sydney, where the proportion of younger people is much higher than the Hunter.* Only one gallery in each region achieved substantially higher numbers of younger (under 35s) visitors (one third or more of total visitors).

* It should be noted that many galleries across both regions have active schools programs in place, and the study did not collect numbers of school-aged children visiting with school groups.

Executive Summary

Key Findings:

Internet usage

- A very small proportion of visitors learned about the gallery or exhibition they attended through the Internet (7% in Western Sydney, 4% in the Hunter).
- Around three quarters of visitors reported using email. Those who attend the gallery more frequently, appear more likely to use email than those who attend less frequently.
- Over 60% said they use the Internet to find out about things to do. Over half said they use the Internet to plan trips or holidays. Over a third said they use the Internet to search for family activities. Those who attend infrequently are slightly more likely to search for family activities on the Internet.
- More than 1 in 10 visitors said they did not use the Internet at all. One third of visitors over the age of 65 said they do not use the Internet at all.
- Visitors with lower incomes report lower rates of Internet use than those with higher incomes.
- Under 35s in both regions have the highest rates of email usage, and using the Internet to find out about things to do.
- 35-44s have the highest rates of using the Internet to plan trips or holidays and to search for family activities.

Project Team

Project Team - M&G NSW

- Katy Alexander, Manager - Research & Audience Development
- Maisy Stapleton, CEO
- Dr Scott Mitchell, General Manager, Business & Administration (Feb – Oct 2008)
- Rachael Vincent, Publicist
- Kathryn Hamilton, Project Assistant
- Danielle Neely, Intern (Museum Studies, University of Sydney)

Project Support - M&G NSW

- Jessica Tyrrell
- Aletha Mays
- Louise Mayhew
- Amanda Muscat

External Project Team

- Matt Steele - Statistical analysis & reporting
- Karen Cooke - Data entry management, Ekas

Steering Committee

- Chair - Katy Alexander: Manager, Research & Audience Development, M&G NSW
- Debbie Abraham: Director, Lake Macquarie City Art Gallery
- Lisa Andersen: Manager and Senior Research Associate, Australia Research Council
- Sue Boaden: Director, Australia Street Company
- Bow Campbell: Program Officer, National Audience Development, Australia Council
- John Cheeseman: Director, Blacktown Arts Centre
- Kim Hanna: Manager, National Audience Development, Australia Council
- Tony Jones: Managing Partner, Jones Donald Strategy Partners
- Lynda Kelly: Head of Audience Research, Australian Museum
- Dr Elaine Lally: Senior Fellow and Assistant Director Centre for Cultural Research University of Western Sydney
- Professor Amanda Lawson: Dean, Faculty of Creative Arts, University of Wollongong
- Elizabeth Smith: Manager, Special Projects and Communications, M&G NSW
- Dr Scott Mitchell: General Manager, Business & Administration, M&G NSW
- Maisy Stapleton: CEO, M&G NSW

Notes on reading charts

- The following charts display totals for the combined results for:
 - **the 7 museums and galleries surveyed in the Western Sydney region**
 - **the 5 museums and galleries surveyed in the Hunter region**

- Some charts show the comparative results between Western Sydney and the Hunter, while other charts detail each individual region separately.
 - In some cases, specific data breakdowns are referenced but not shown on the chart.

- Comparative statistics from the Australian Bureau of Statistics 2006 Census have been included where possible.
 - These include statistics compiled by the Western Sydney Region of Councils (WSROC), which combine statistics from all Local Government Areas relevant to the study in Western Sydney.
 - ABS statistics for the “Hunter region” include combined statistics for all the LGAs relevant to the museums and galleries in the Newcastle/Hunter and Central Coast (Gosford).
 - ABS data is not shown on every chart and may be only referenced in chart commentary.

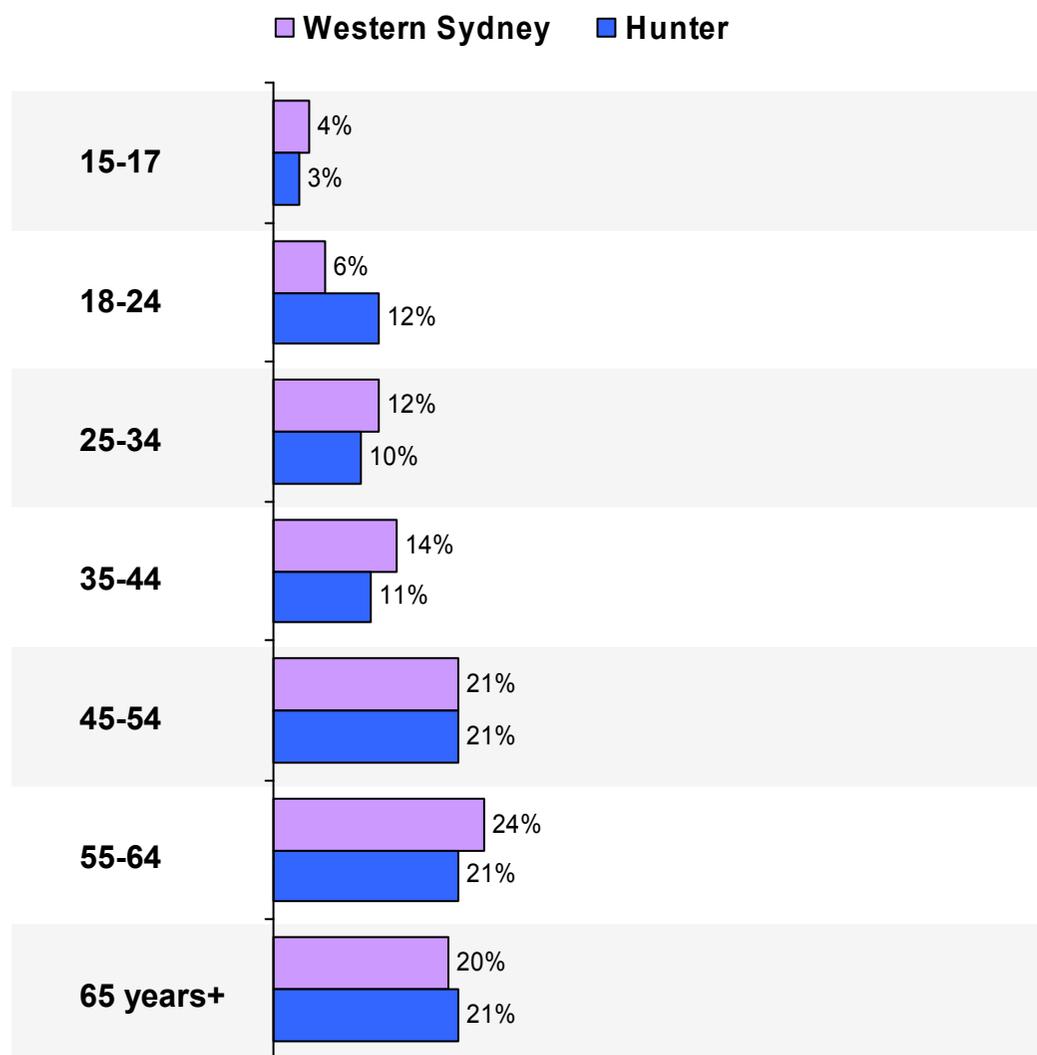
M&G NSW

Visitor Demographics



Photo by Adam Hollingsworth. Photo courtesy of Blacktown Arts Centre.

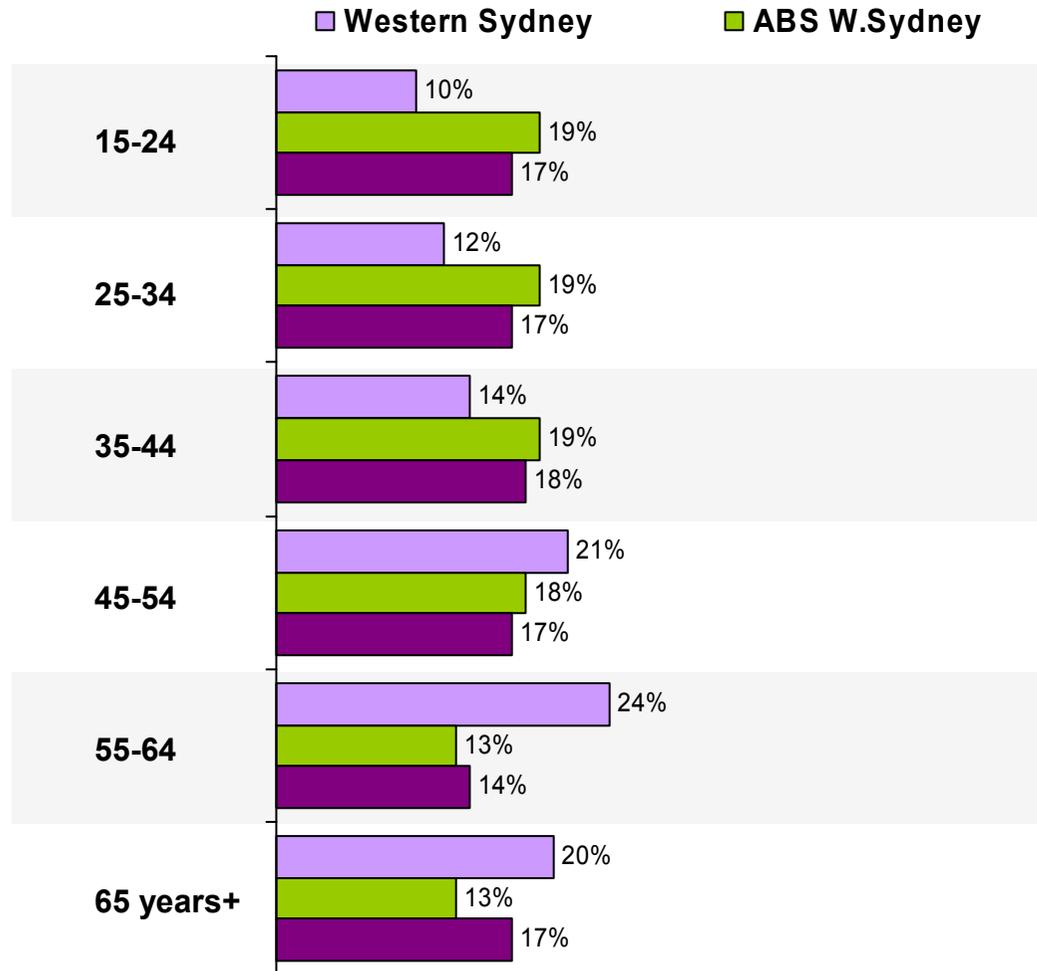
Sample Characteristics: Age



- Visitation was skewed to older age categories.
- Over 40% of visitors in both regions were over the age of 55.
- 1 in 5 visitors were aged under 35 in the Hunter.
- 1 in 4 visitors were aged under 35 in Western Sydney.

Sample Characteristics: Age

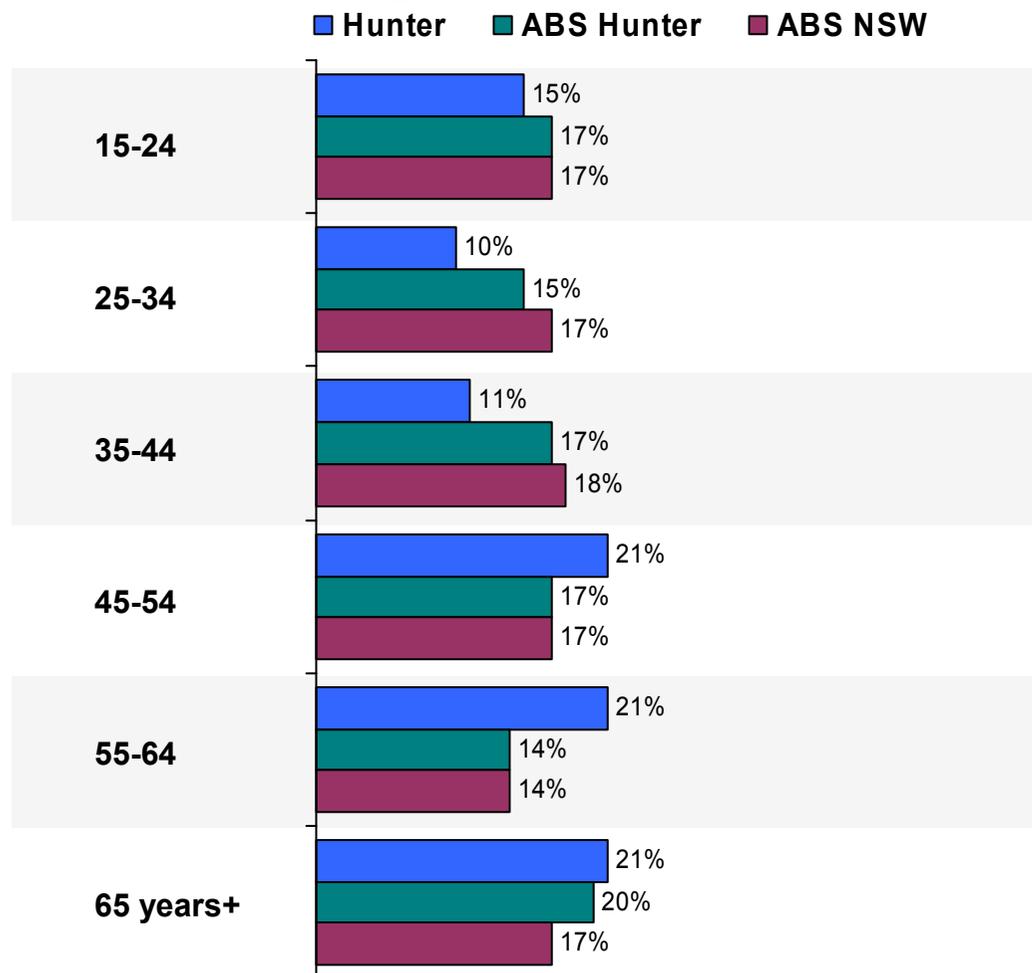
Western Sydney visitor age distribution vs. ABS Census distribution



- Visitors across the Western Sydney region skew markedly higher in age than ABS statistics for the region. Visitors are over-represented in the 55-64 age category and under-represented in the 15-24 age category.
- Note: the ABS figures have been rebased to exclude the 22.6% in the population who are 14 and under, as these people were not sampled in the survey. Percentages have been rounded to nearest whole number.

Sample Characteristics: Age

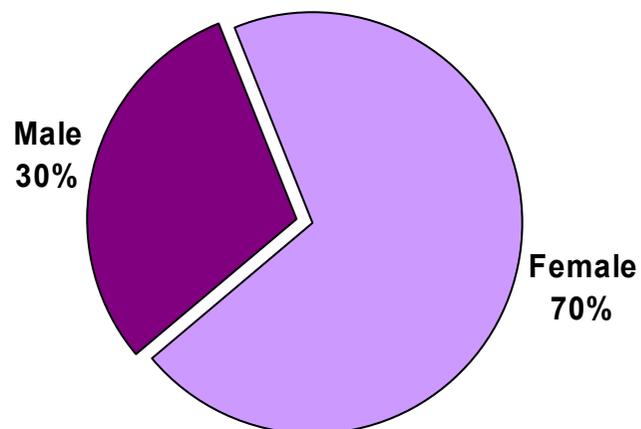
Hunter visitor age distribution vs. ABS Census distribution



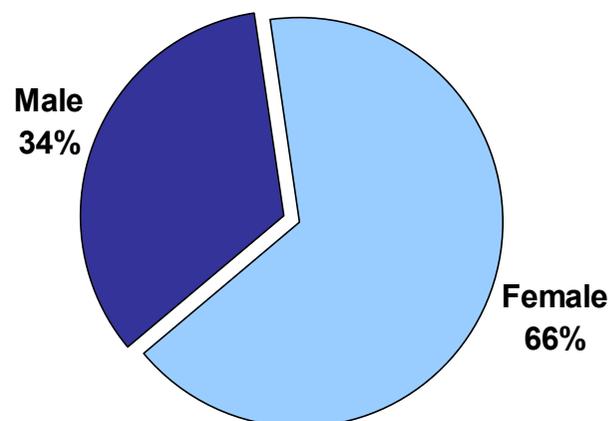
- Visitors to the centre skew slightly higher in age than ABS for Hunter. Visitors are over-represented in the 55-64 age category and under-represented in the 15-24 age category.
- Note: the ABS figures have been rebased to exclude the 19.5% in the population who are 14 and under, as these people were not sampled in the survey. Percentages have been rounded to nearest whole number.

Sample Characteristics: Gender

Western Sydney

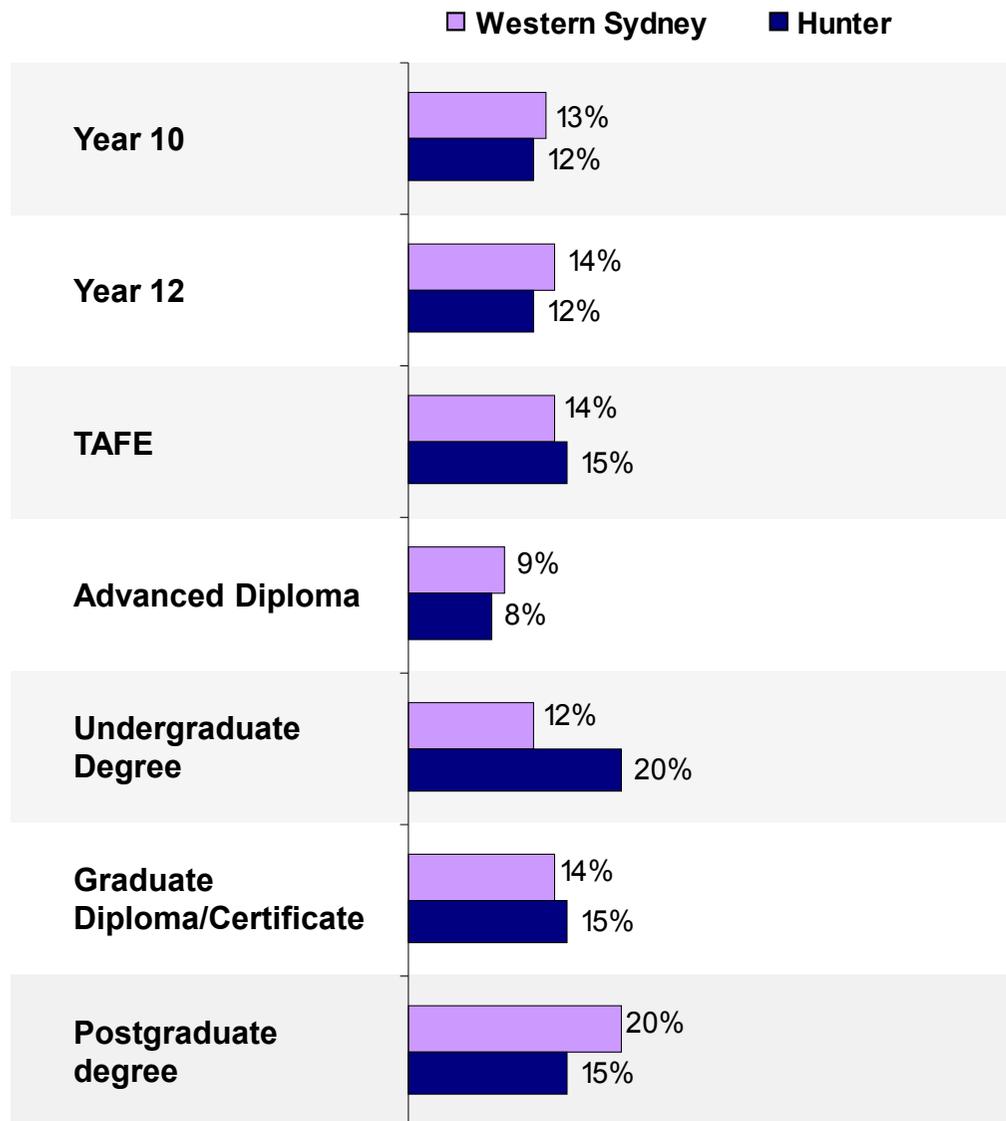


Hunter



- Around 2 in 3 visitors are women.
- Gender proportions are similar across all age groups.

Highest Level of Education Attained



- There is a good spread of education levels across visitors in both regions surveyed.

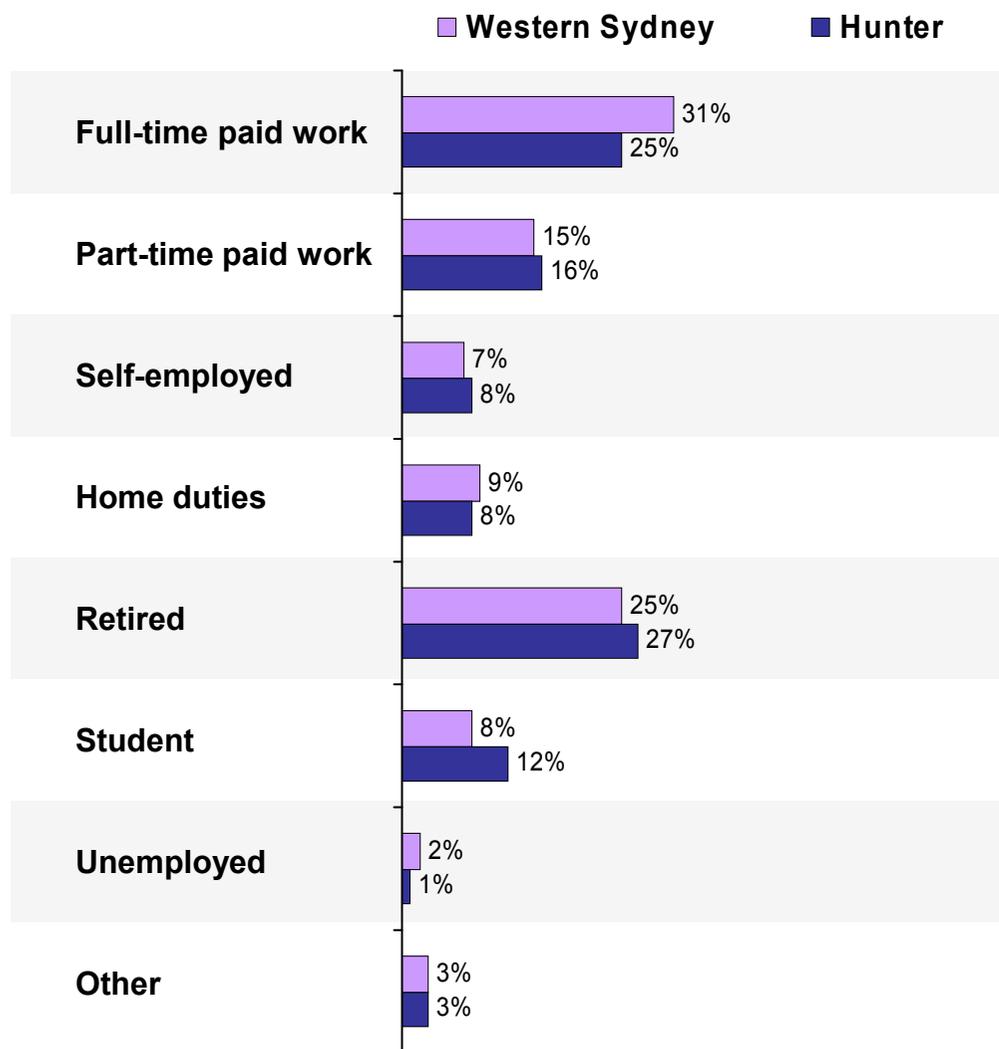
Comparisons to NSW ABS (not shown on chart)

- In Western Sydney, the percentage of visitors with an undergraduate degree is very similar to NSW residents (12.1%).
- Western Sydney visitors are more likely than Hunter visitors and far more likely than NSW residents (3.1%) to hold a postgraduate degree.
- Hunter visitors are more likely than NSW residents to hold undergraduate and postgraduate qualifications.
- Rates of Advanced Diplomas and TAFE certificates (or equivalents) are similar across both regions and compare closely to those of NSW residents.

Note: About 11% of respondents chose not to answer this question
 “Still at school” & “primary school” not shown, about 1% respectively for each region

Base: All valid responses; N=1029, W. Sydney; N=972, Hunter

Sample Characteristics: Occupation



- Regional galleries may provide an important social and cultural resource for those not in full-time employment. In fact, over 1 in 2 visitors were not in full-time employment.
- Only 1 in 4 visitors work full-time in the Hunter.
- Around 1 in 3 visitors work full-time in Western Sydney.
- About 1 in 4 visitors are retirees.
- The majority of visitors undertaking home duties and part-time work are women.

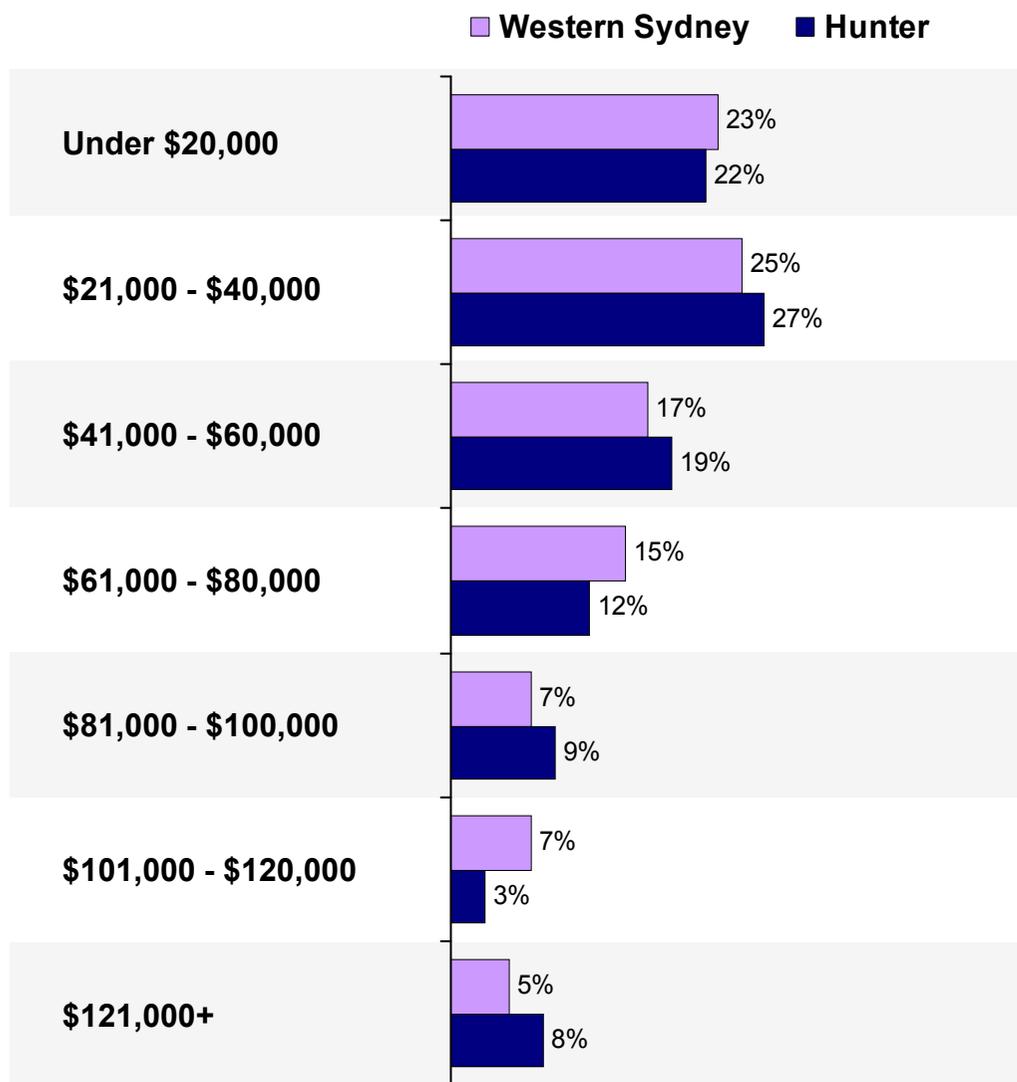
Comparisons to NSW ABS (not shown on chart)

- Around 60% of NSW residents are in full-time paid employment, while around 27% are in part-time paid work.

A Note About Annual Household Income

- The *Strategic Audience Development Study* asks people about their *annual household* income. In the *Strategic Audience Development Study* questionnaire, household incomes are grouped into 7 categories (each category is listed in whole thousands i.e. \$21,000 - \$40,000).
- This was our preferred method for this study.
- The ABS Census publishes *weekly household* income categories. We multiplied each of these categories by 52, in order to arrive at a comparative annual household income figure.
- NB. These annual household income groupings are not an *exact* match with ABS groupings.

Annual Household Income Before Tax



- Around 1 in 2 visitors to both regions have an annual household income of \$40K or less.
- Only 1 in 10 visitors have an annual household income over \$100K.

Comparisons to NSW ABS (not shown on chart)

- Lower income earners are over-represented as visitors in Western Sydney and the Hunter as compared to ABS Census data. In fact, over 1 in 2 visitors fall below the median wage for NSW (\$53,872).

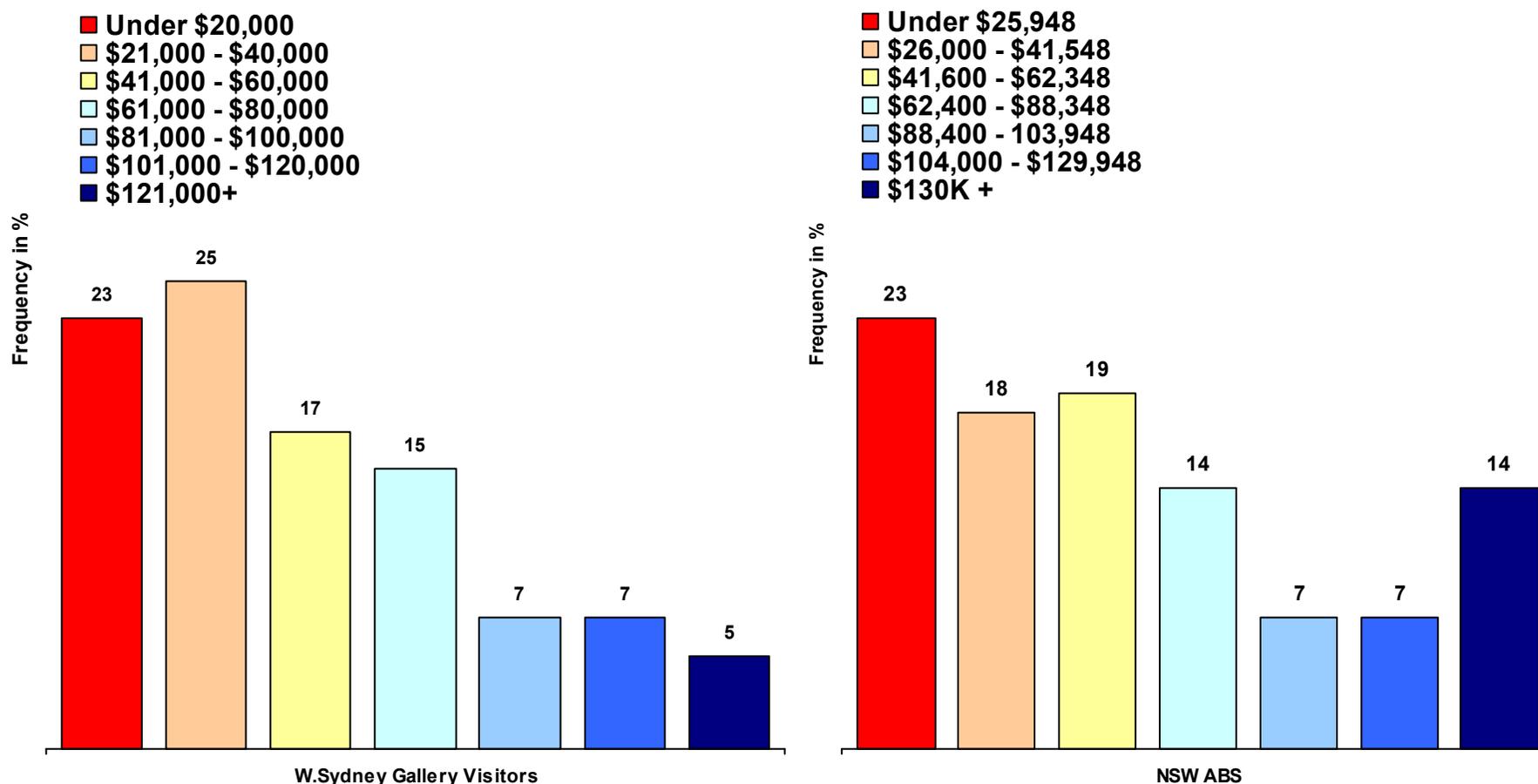
Note: 24% of respondents chose not to answer this question

Base: All valid responses; N=887, W. Sydney; N=835, Hunter
ABS 2006 Census Data NSW

Annual Household Income Before Tax

Western Sydney Visitors Income Comparison with NSW ABS Census Data

- 48% of visitors in Western Sydney have a household income of \$40,000 or lower, compared to 36% of NSW residents.
- Over 1 in 10 NSW residents have household earnings of \$121,000 or more, compared with only 1 in 20 Western Sydney visitors.

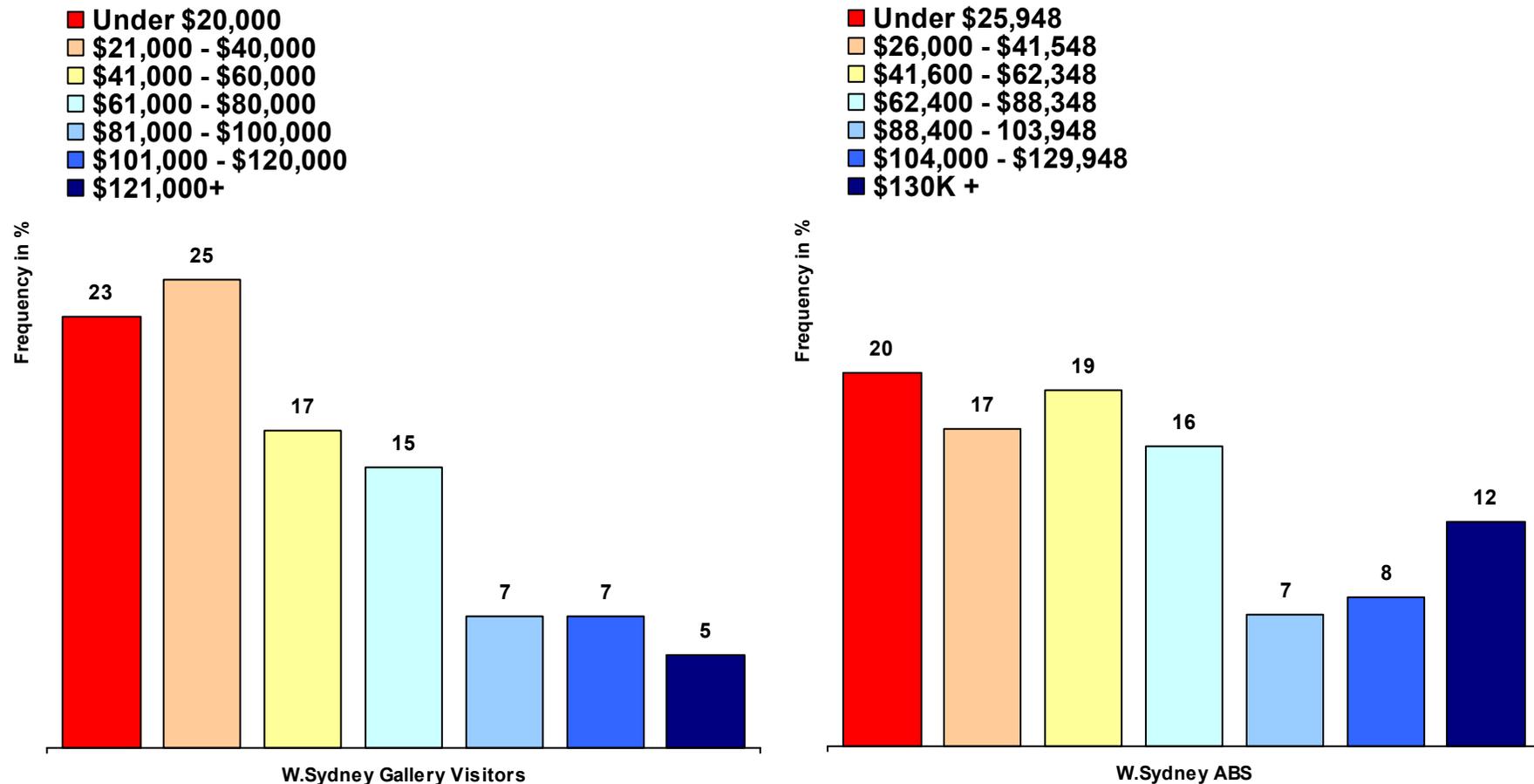


Base: All valid responses; N=887, W. Sydney; NSW Source: ABS Census Data 2006

Annual Household Income Before Tax

Western Sydney Visitors Income Comparison with W. Sydney ABS Census Data

- 48% of visitors in Western Sydney have a household income of \$40,000 or lower, compared to 41% of Western Sydney residents.
- At the top end, there appears to be less visitors in the top income bracket compared to W.Sydney ABS data (12% vs. 5%).

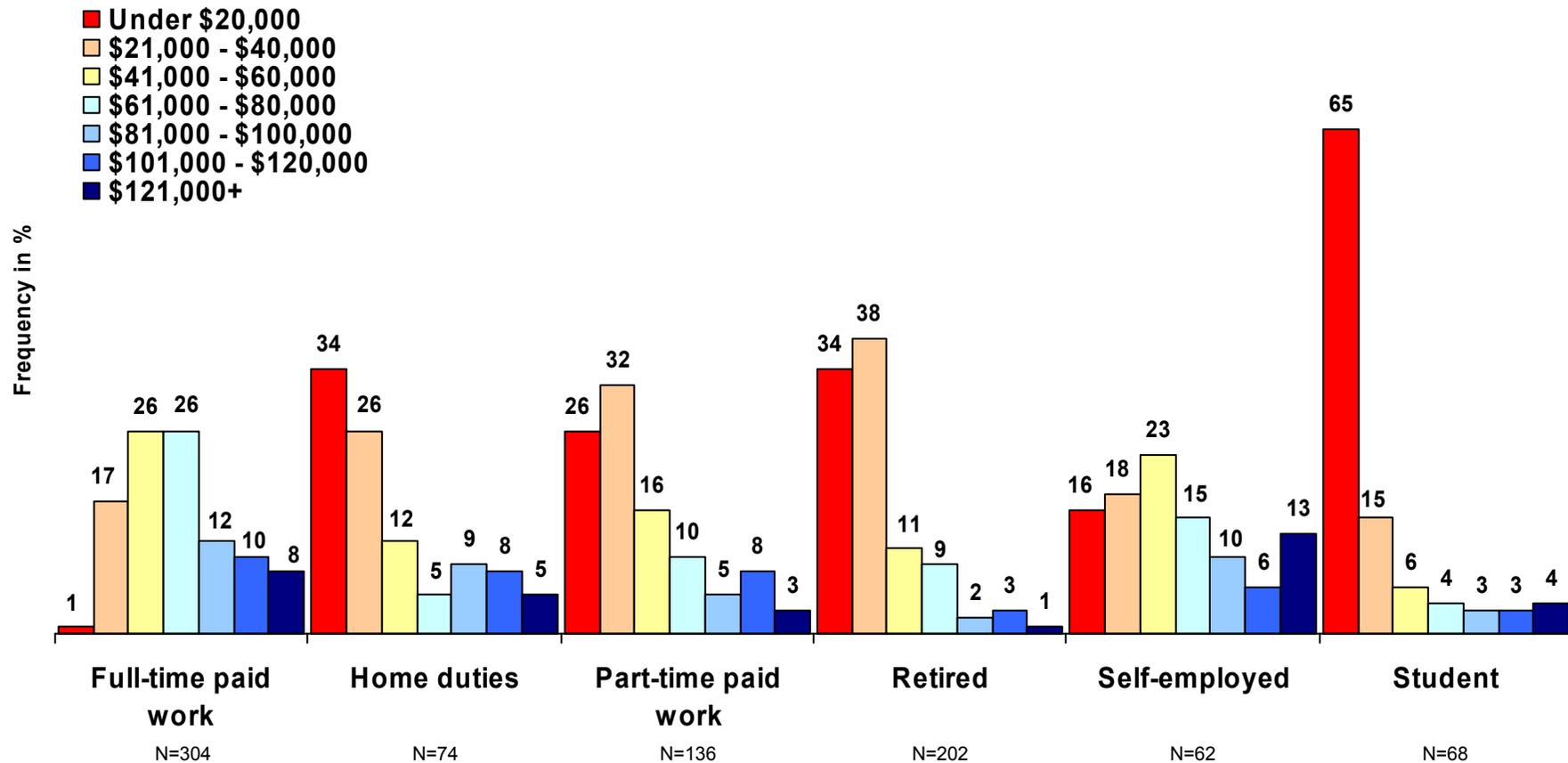


Base: All valid responses; N=887, W. Sydney; NSW Source: ABS Census Data 2006 compiled by WSROC

Annual Household Income Before Tax

Western Sydney Income by Occupation

- Retirees in Western Sydney, who make about a quarter of all visitors, are skewed to lower income brackets than full-time workers.
- The majority of students in the sample are in the lowest income bracket (<\$20K).

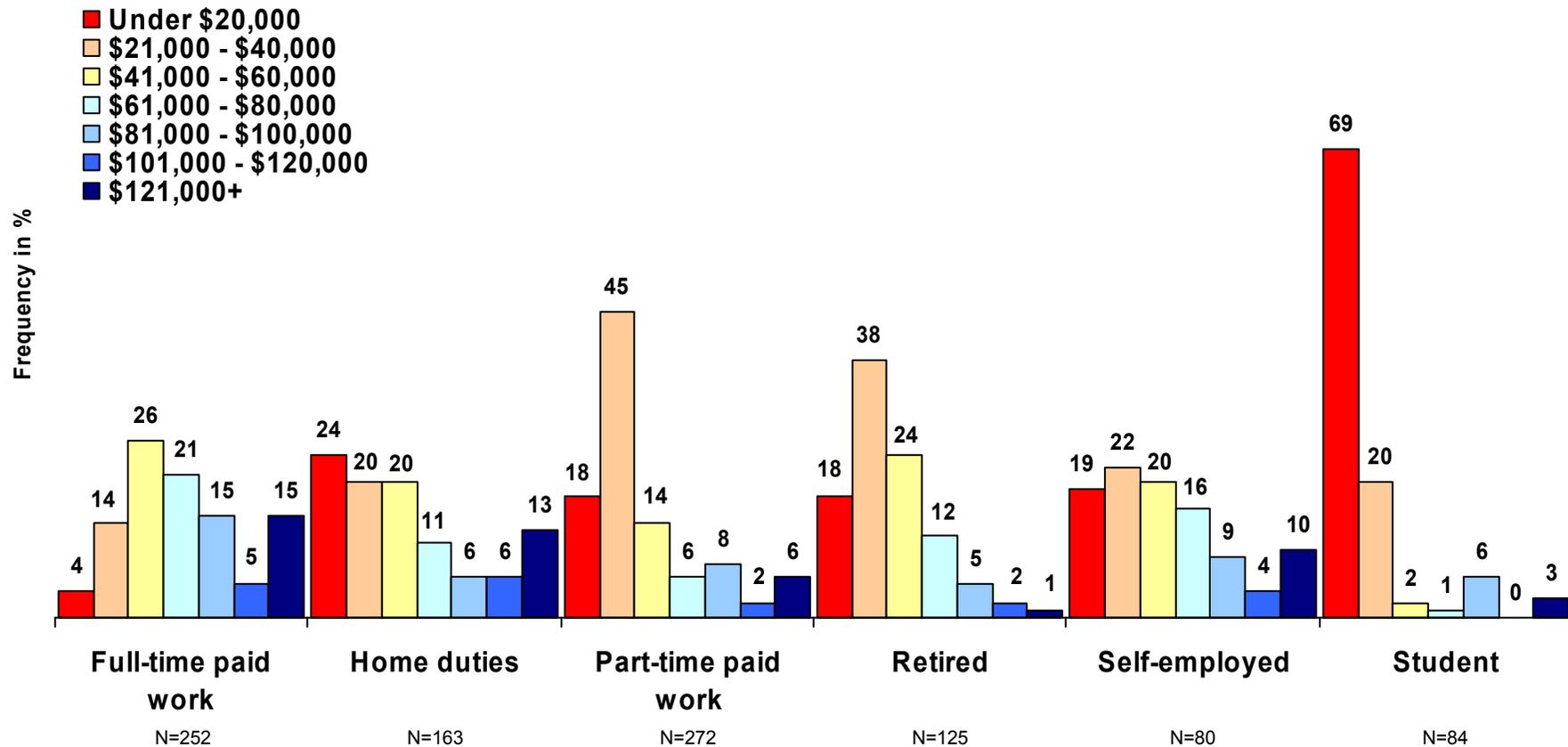


Base: All valid responses, Western Sydney

Annual Household Income Before Tax

Hunter Income By Occupation

- Retirees in the Hunter, who make about a quarter of all visitors, are skewed to lower income brackets compared to full-time workers.
- Most students in the sample are earning less than \$20K a year.

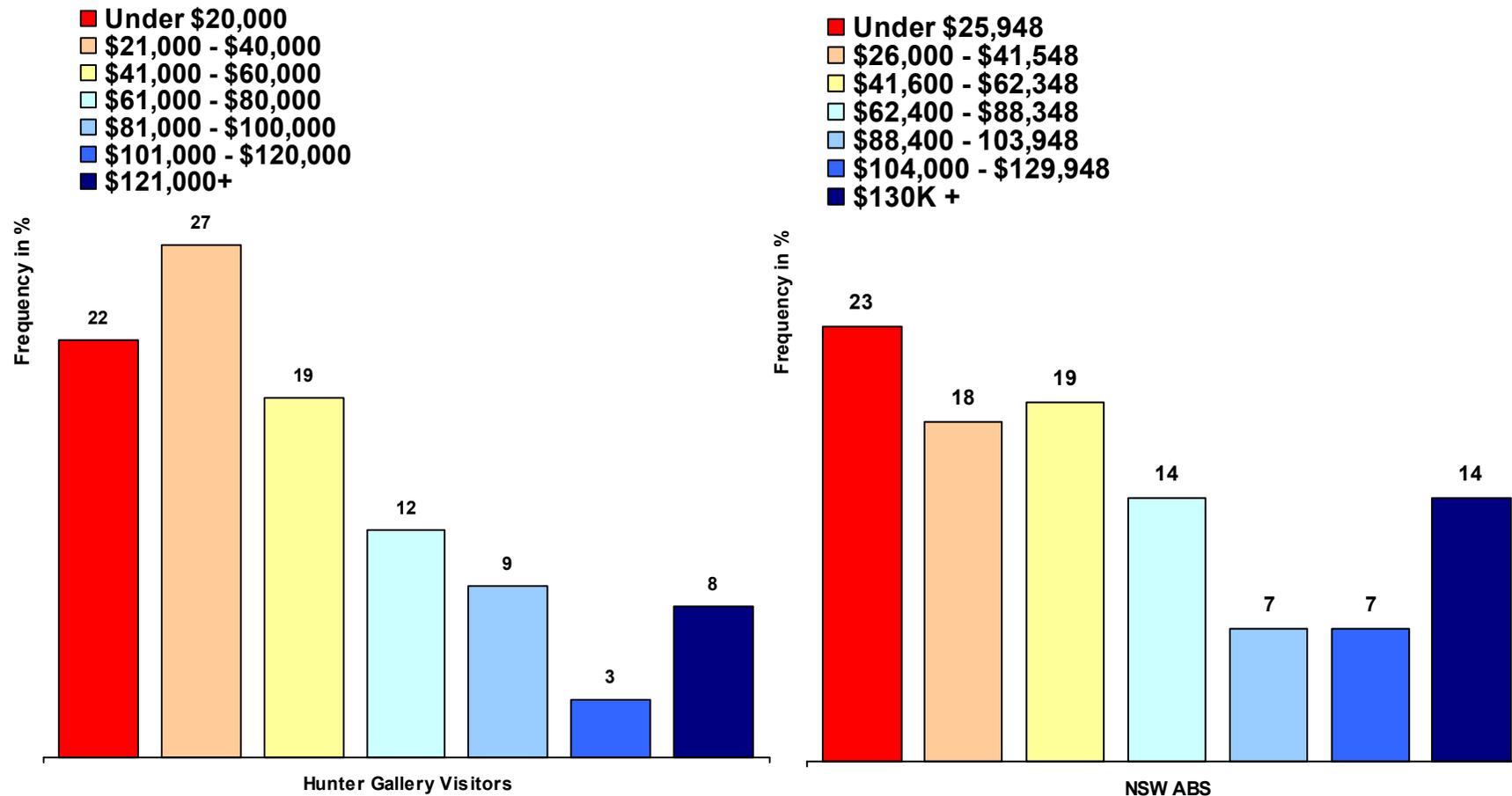


Base: All valid responses, Hunter region

Annual Household Income Before Tax

Hunter visitors Income comparison with NSW ABS Census Data

- 49% of visitors in the Hunter have a household income of \$40,000 or lower, compared to roughly 41% of NSW residents.
- Almost 1 in 5 NSW and Hunter residents have household earnings of \$101,000 or more, compared with 1 in 10 Hunter visitors.

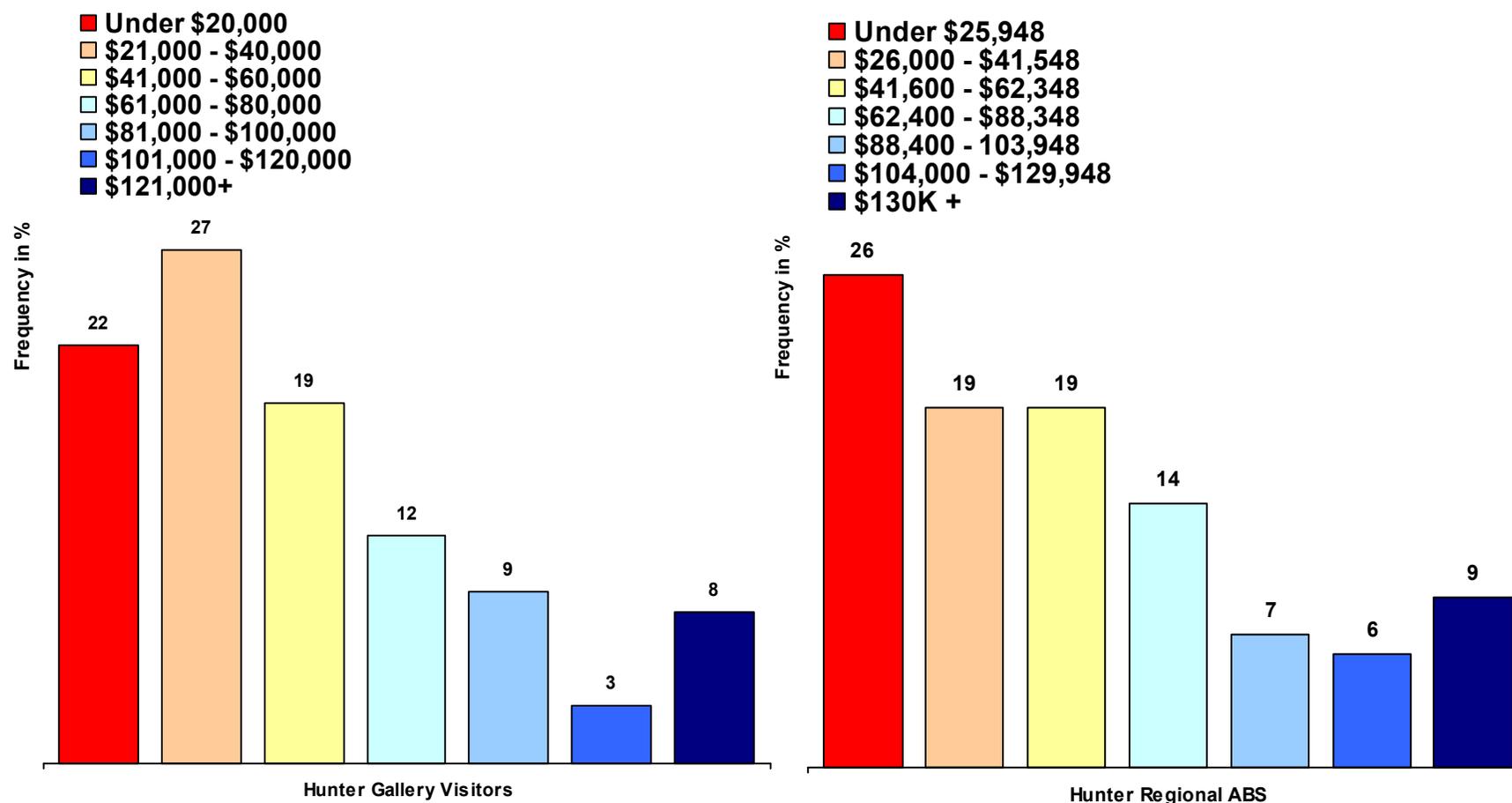


Base: All valid responses; N=835, Hunter; NSW Source: ABS Census Data 2006

Annual Household Income Before Tax

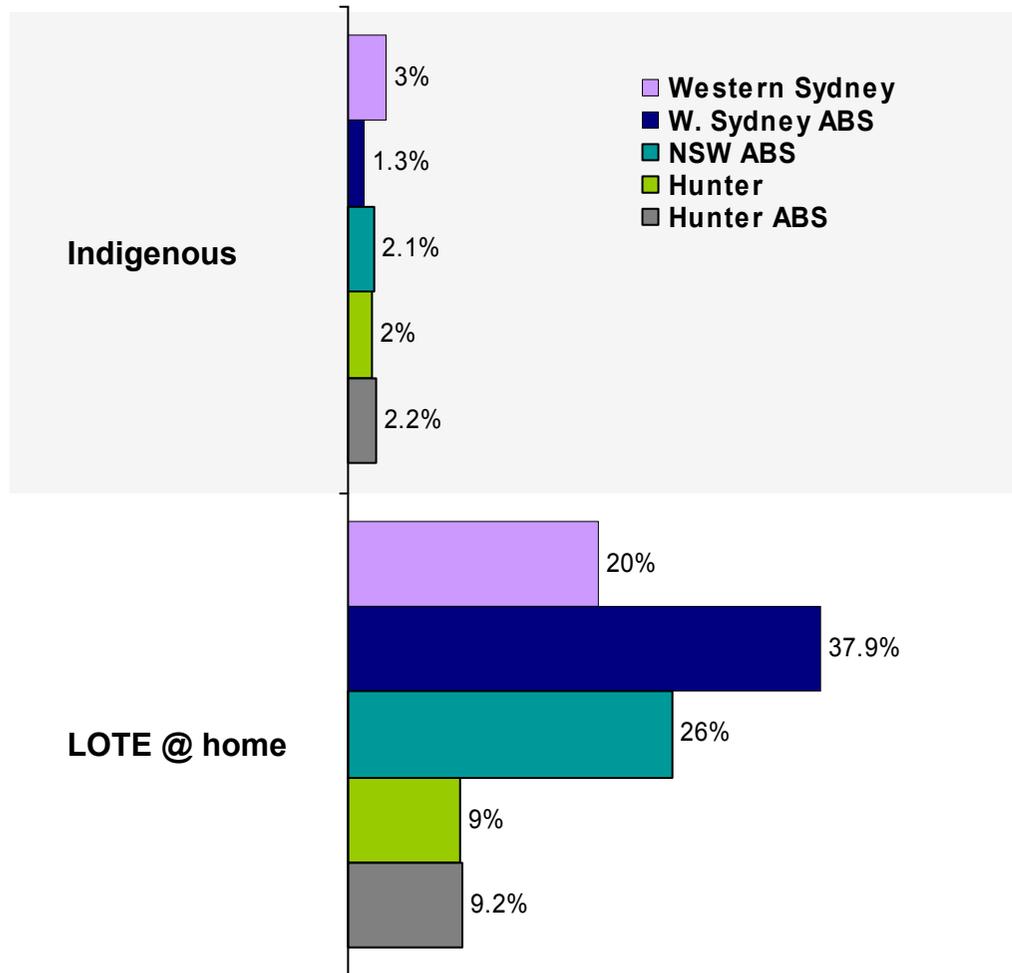
Hunter visitors Income comparison with Hunter Regional ABS Census Data

- The visitor household income distribution in the Hunter appears to be similar to the Hunter Regional ABS.



Base: All valid responses; N=835, Hunter; NSW Source: ABS Census Data 2006

Sample Characteristics: Diversity



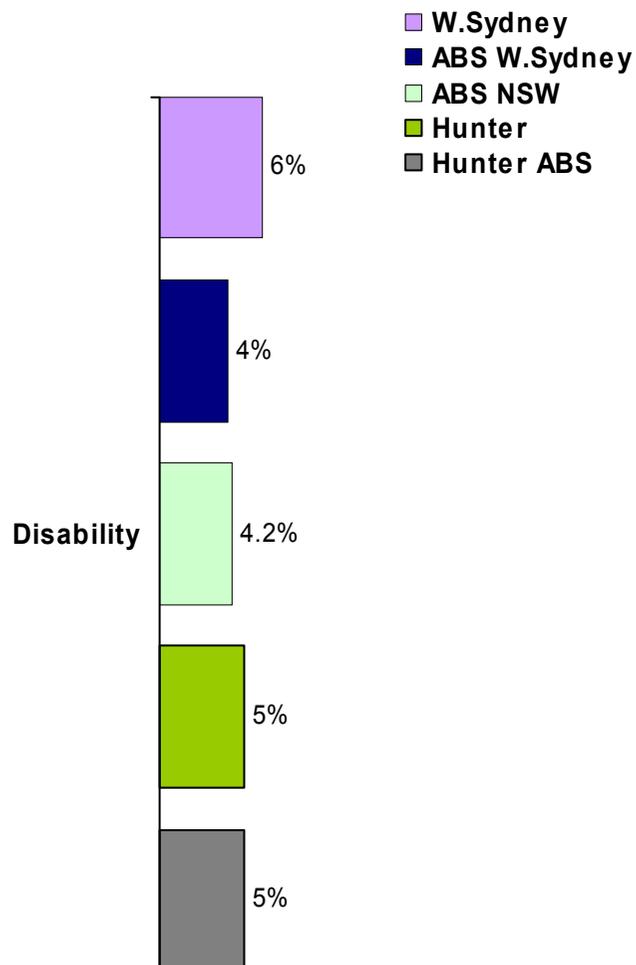
- Indigenous people in Western Sydney represent 1.3% of the total population; more than double the actual proportion of Indigenous people living in Western Sydney are visiting the galleries and museums.
- At least 1 in 5 visitors spoke a language other than English at home (LOTE) in Western Sydney. This is less than the ABS population proportion, however researchers believe LOTE visitors may be under-represented in the sample.*
- 1 in 10 visitors spoke a language other than English in the Hunter region, comparable to the ABS population proportion.

* As the questionnaire was only available in English, researchers believe the proportion of LOTE visitors may be higher

Base Size	W. Sydney	Hunter
Indigenous	N=1088	N=1019
LOTE @ home	N=1095	N=1022

Sample Characteristics: Access

Hunter comparison table ABS (core activity need for assistance)

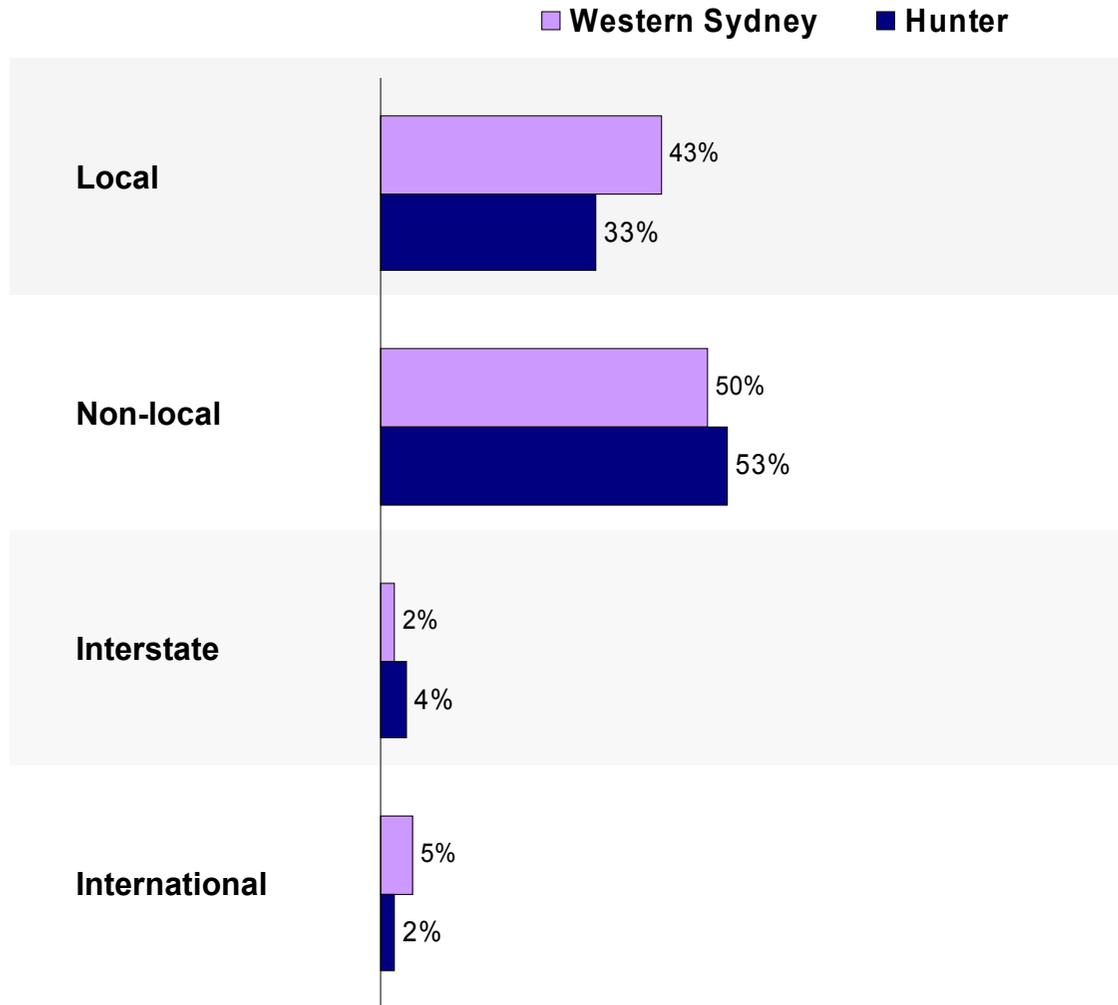


- Rates of visitors in both regions identifying as disabled are similar to rates of disabled visitors as defined by “core activity need for assistance” in the ABS Census data.
- However, Accessible Arts NSW uses a broader definition of disability, and estimates that around 1 in 5 (20%) of NSW residents live with some form of disability.

Q.25. Do you have a disability or other condition that impacted on your visit today?

Base Size	W. Sydney	Hunter
Disability	N=1029	N=990

Proximity to the Gallery/Museum

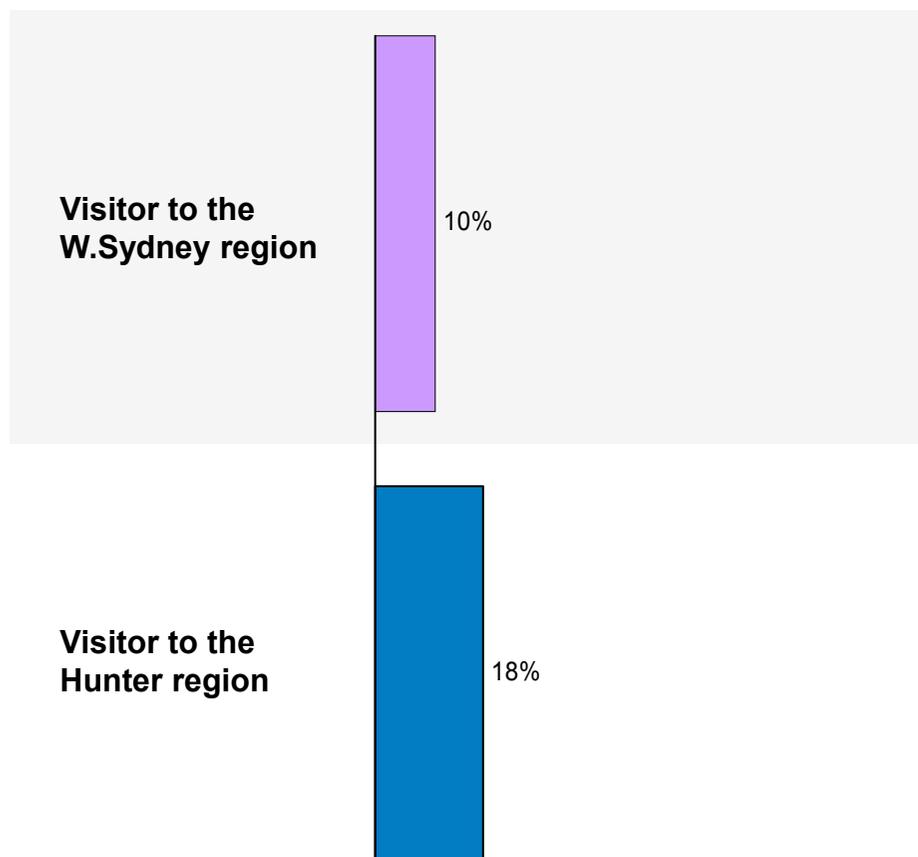


- About 1 in 2 of those attending Western Sydney galleries lived locally, while close to half lived further away.
- However, only 7% were visiting from interstate or overseas.
- One third of Hunter visitors lived locally, while just over half lived further away.
- Only 6% were visiting from interstate or overseas.

NB.

- *In metro areas, “local” is defined as residing within a 3-5km radius of the gallery.*
- *In rural areas, “local” is defined as residing within a 9-20km radius of the gallery.*

Cultural Tourism – Visitors to the Region



- The previous chart shows that only 6% of Hunter respondents were visiting from interstate or overseas. This chart shows that 18% are visitors to the Hunter region overall. Therefore, we can deduce that around 12% of visitors to Hunter galleries are NSW residents staying overnight in the area.
- For W.Sydney, by similar deductive reasoning, only 3% of visitors are NSW residents staying overnight in the area.

Figures show respondents who answered the cultural tourism section (Q21-22) and stayed at least one night in the region

Base:, N=111, W. Sydney; N=193, Hunter

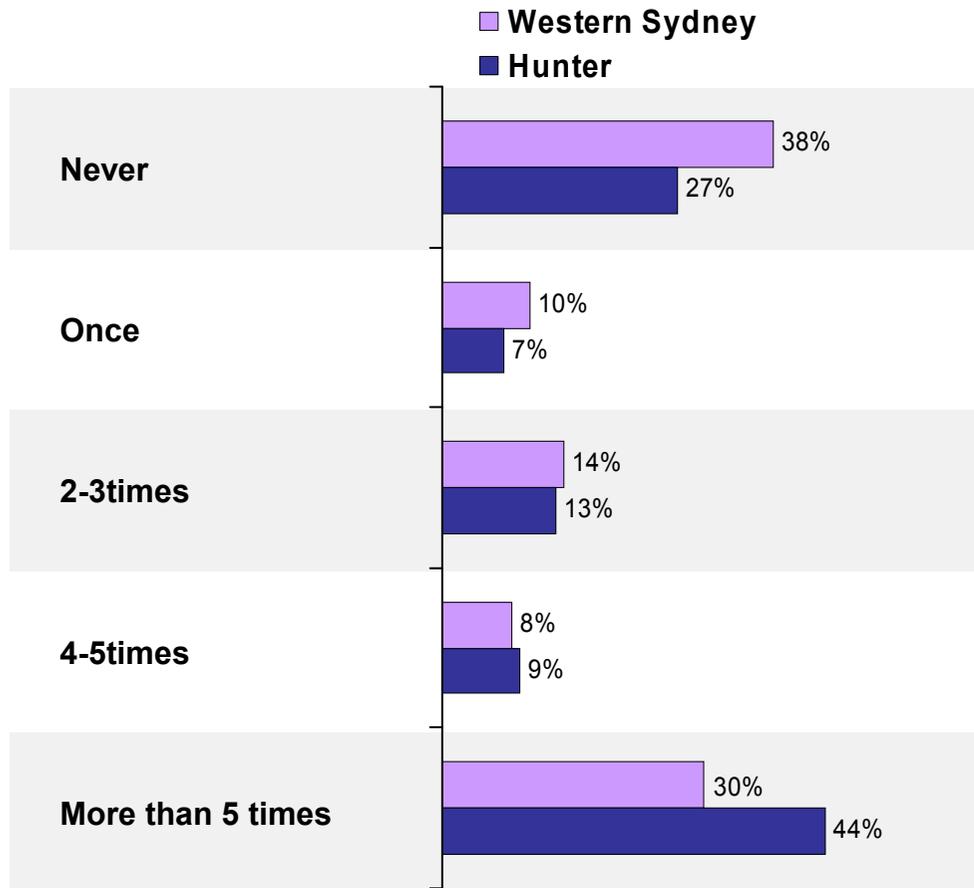
Visitor Behaviour

How Many Times Did They Visit?



Photo courtesy of Hawkesbury Regional Gallery.

Number of Visits to Gallery/Museum



- First-time visitors represent over a quarter of visitors in the Hunter and over a third of visitors in Western Sydney.
- When visitors return, they are most likely to return many times rather than just once or twice.

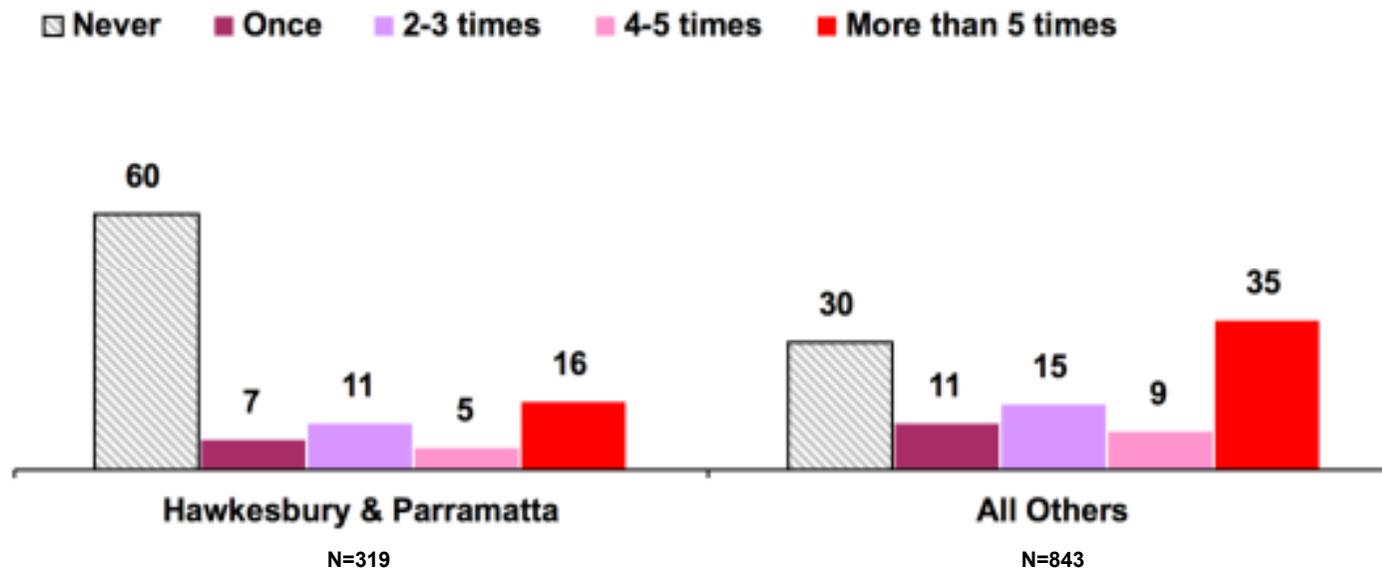
Q.1: How many times have you visited this gallery/museum before today?

Base: All valid responses N = 1162, W.Sydney, N= 1095, Hunter

Number of Visits to Museum/Gallery

Western Sydney: Hawkesbury & Parramatta galleries aggregated vs. other galleries

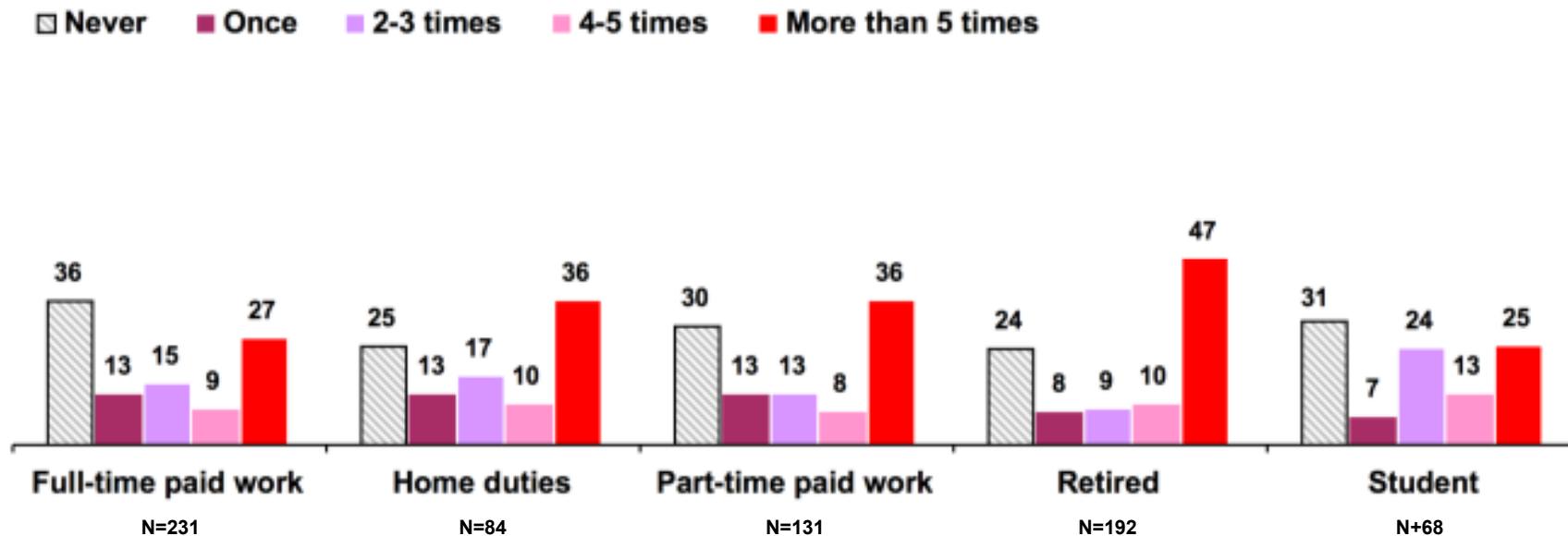
- *Hawkesbury and Parramatta show far higher numbers of first-time visitors than other galleries/museums.*
- *This is logical because Hawkesbury opened only recently (2005), while Parramatta Heritage Centre has a tourist information centre which is designed specifically to attract visitors to the area.*



Number of Visits to Museum/Gallery

Western Sydney: Visitation Frequency by Main Occupation

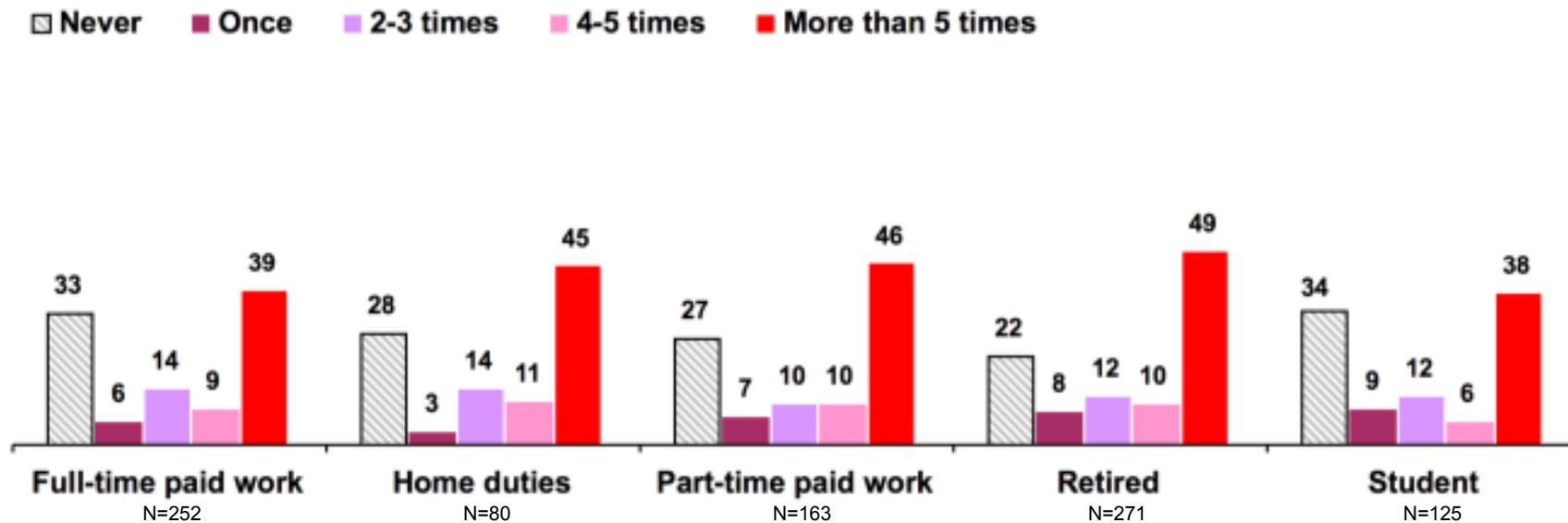
- Retirees more likely to have visited “more than 5 times” overall and much more likely compared to full time workers and students.



Number of Visits to Museum/Gallery

Hunter: Visitation Frequency by Main Occupation

- More than a third of all these groups had visited their Hunter gallery more than 5 times.
- 1 in 2 retirees had visited more than 5 times, and were the least likely group to be visiting for the first time.

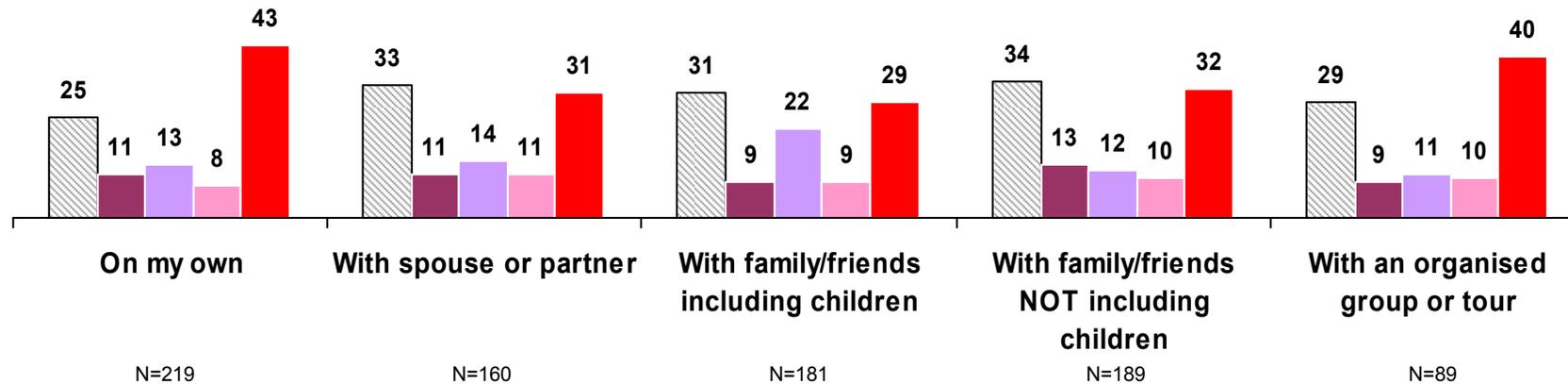


Number of Visits to Museum/Gallery

Western Sydney: Visitation Frequency by Who Visiting With

- People visiting on their own are most likely to have visited more than 5 times before.
- Those coming with spouse/partner or family/friends without children, are most likely to be first-timers to the gallery.

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



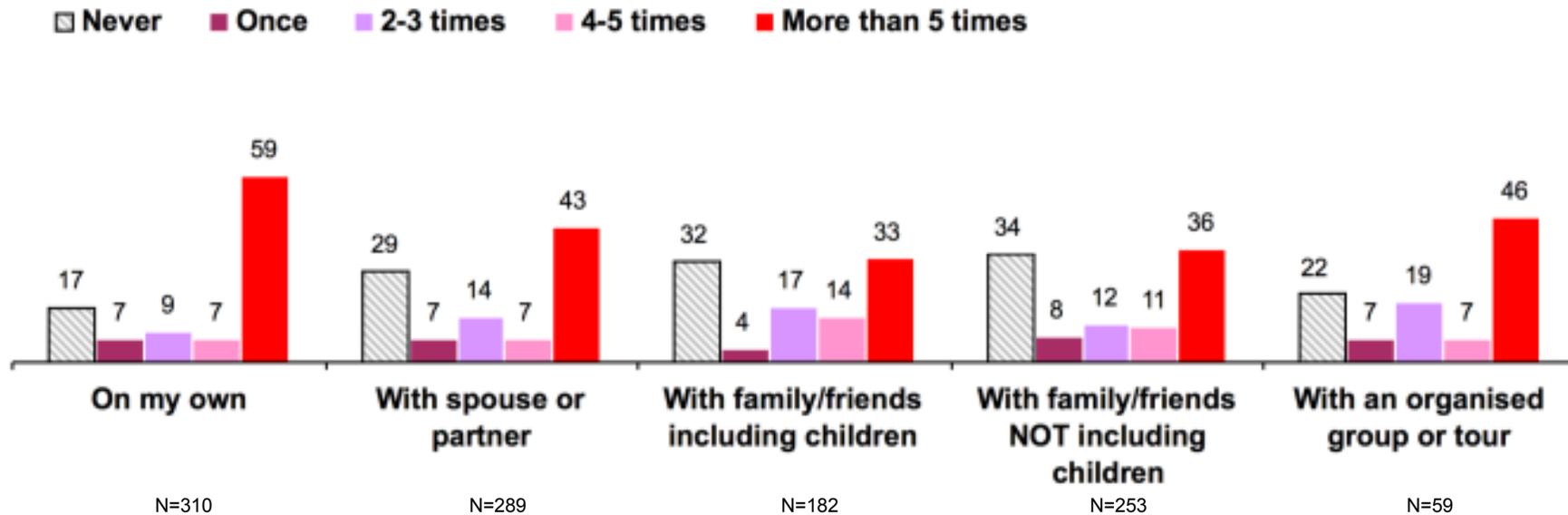
Q.1: How many times have you visited this museum before today?

Base: All valid responses Western Sydney, excludes Hawkesbury & Parramatta

Number of Visits to Museum/Gallery

Hunter: Visitation Frequency by Who Visiting With

- Visitors who come on their own are most likely to have come more than 5 times, and less likely to be visiting for the first time.



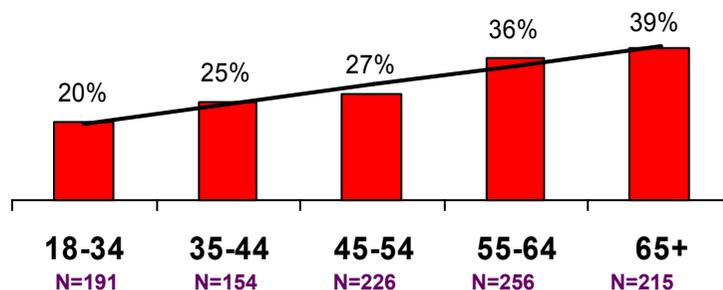
Number of Visits to Museum/Gallery

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

- This trend only pertains to the frequency of the response to “more than 5 times”, not the other frequency of visitation categories.

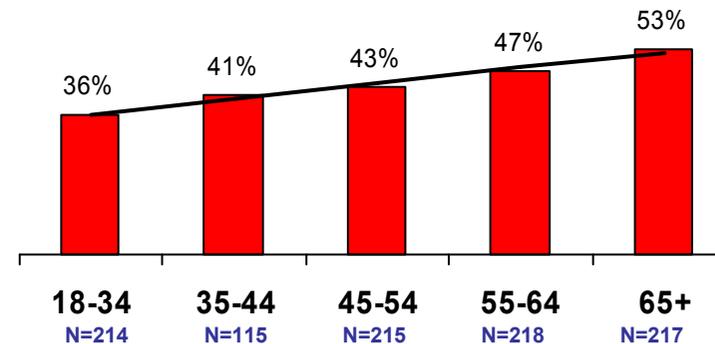
Western Sydney

■ 'More than 5 times'



Hunter

■ 'More than 5 times'

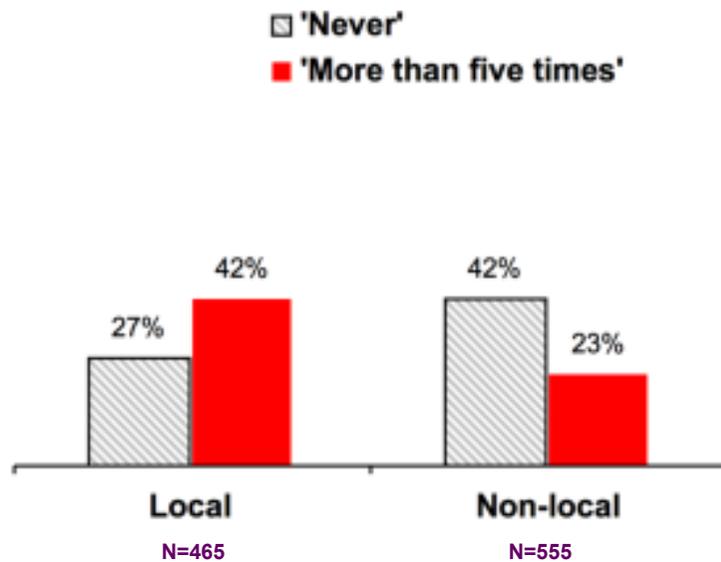


Number of Visits to Museum/Gallery

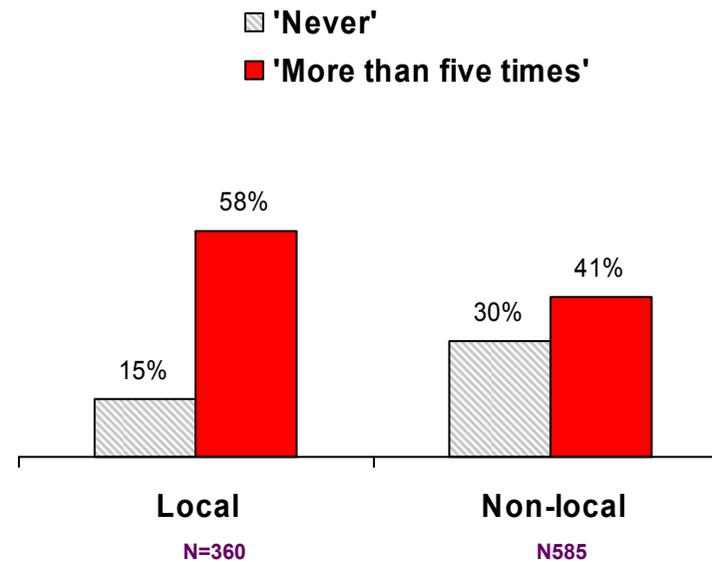
Visitation by locals or non-locals

- *Locals are more likely to visit the gallery “more than 5 times”.*
- *Non-locals are more likely to be visiting the gallery for the first time.*

Western Sydney



Hunter



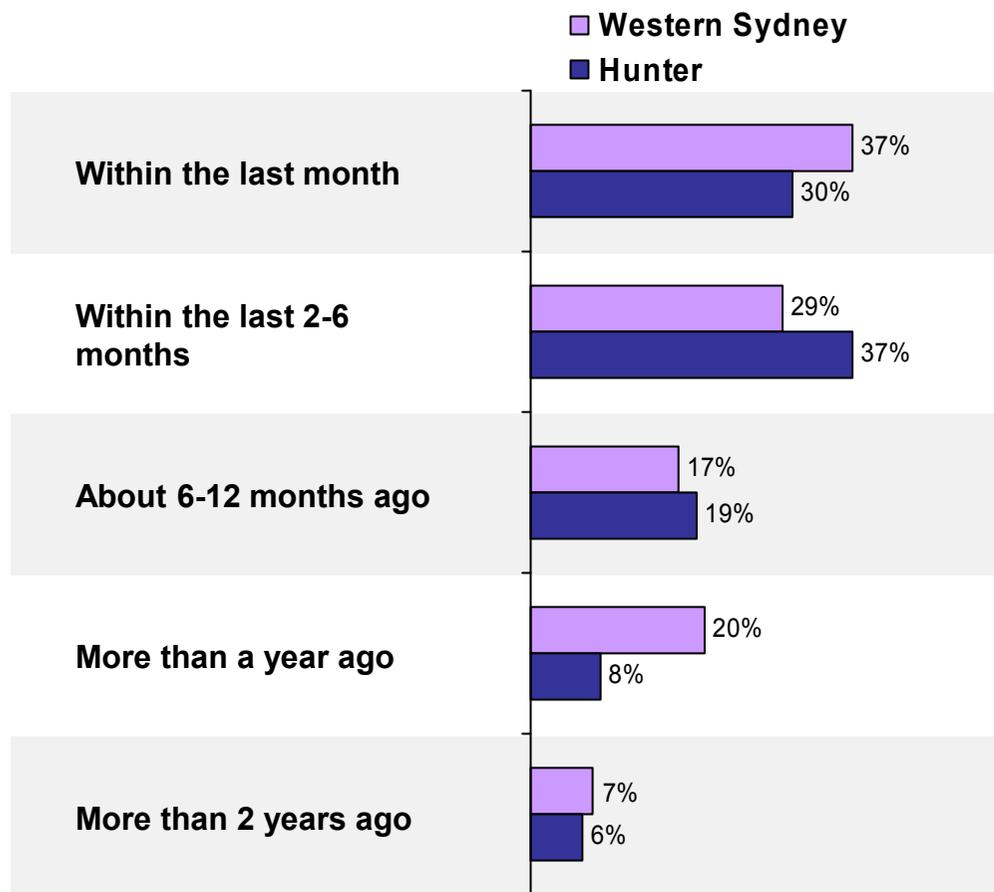
Visitor Behaviour

- *When Did They Last Visit?*
- *Who Did They Visit With?*



Photo courtesy of Fairfield City Museum.

Time Since Last Visit



- 2 in 3 visitors in both regions had visited the gallery within the past 6 months, with over a quarter of those visiting within the past month.
- Around 1 in 4 had visited more than a year ago.
- No significant differences by visitor demographics.

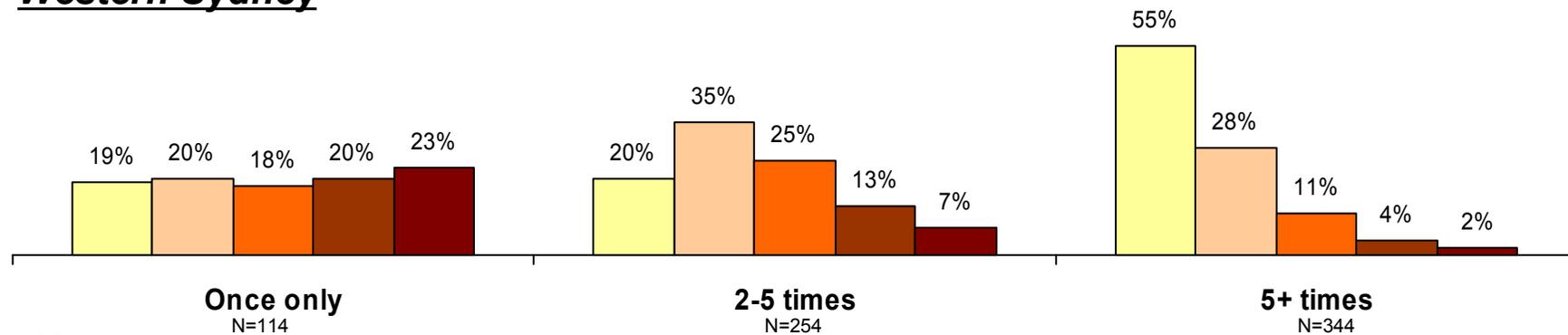
Time Since Last Visit

Frequency of Visit by Time Since Last Visit

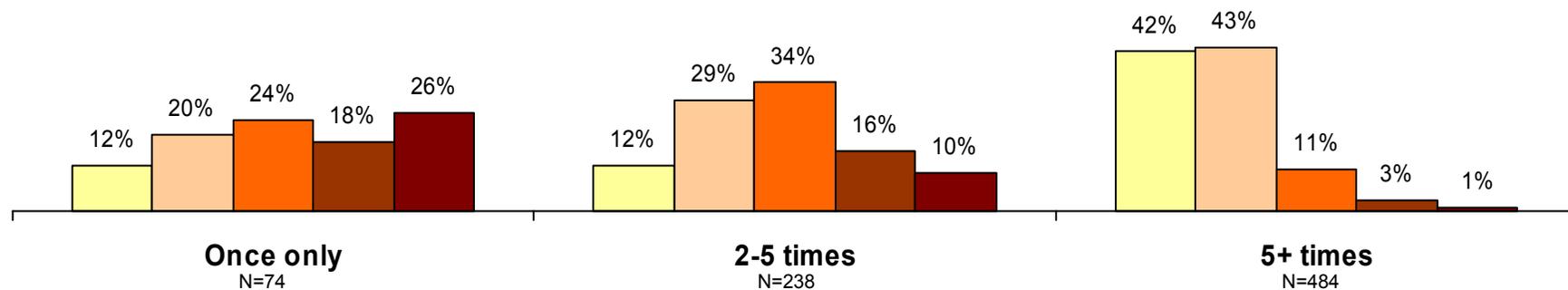
- In both regions, those who have visited the gallery more than 5 times have also visited the gallery more recently. This suggests there is a core group of regular visitors, who come frequently to the galleries.



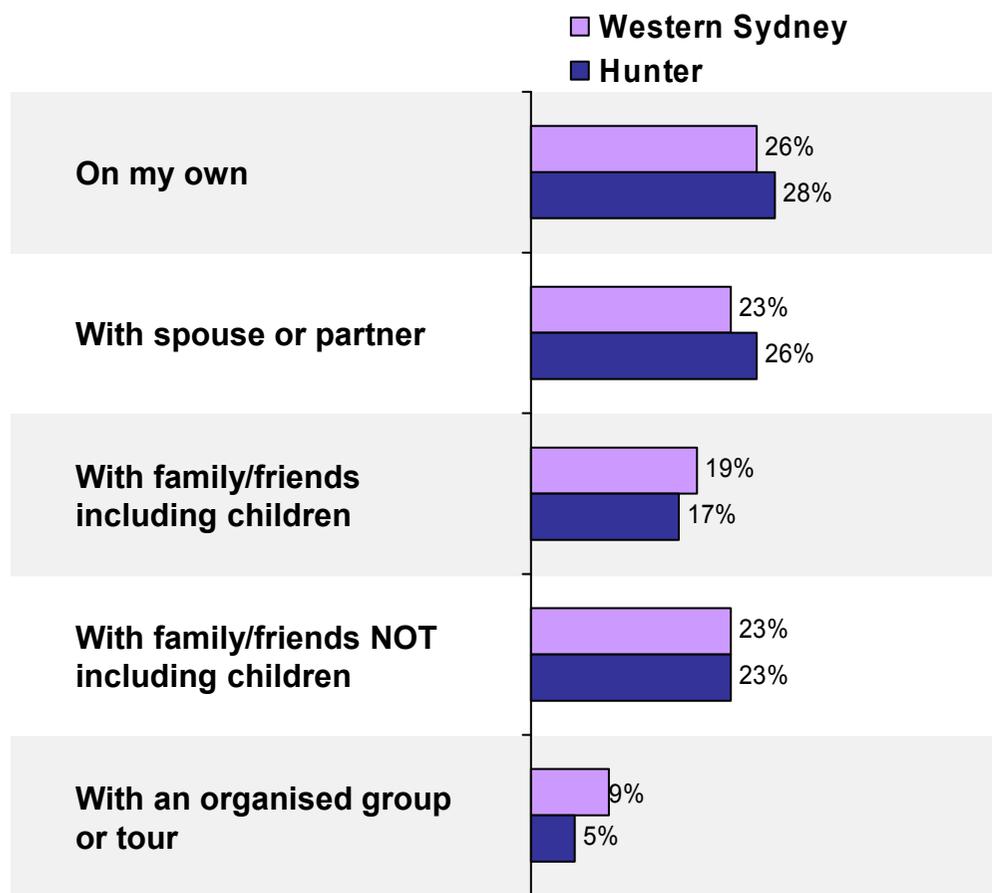
Western Sydney



Hunter



Who They Visited With



- Around 1 in 3 visitors are attending on their own, while a similar proportion are attending with a spouse or partner.
- Around 2 in 5 are attending with family/friends.
- Just under 1 in 5 are attending with children.

Who They Visited With

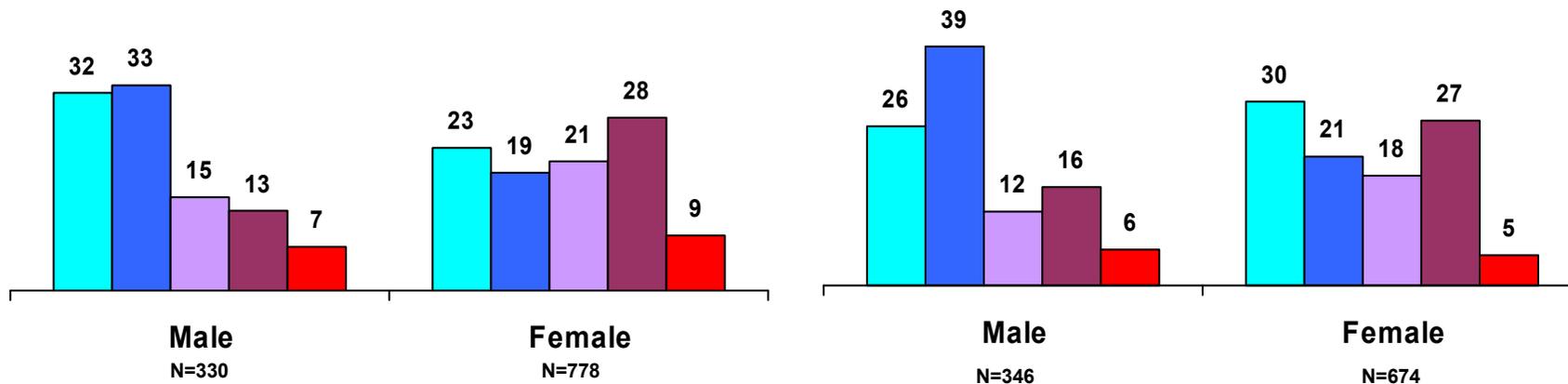
Breakdown by Gender

- Men are more likely than women to visit with their partner.
- In Western Sydney men are more likely to visit alone than women.
- Women in both regions are much more likely than men to visit with family/friends.

Western Sydney

Hunter

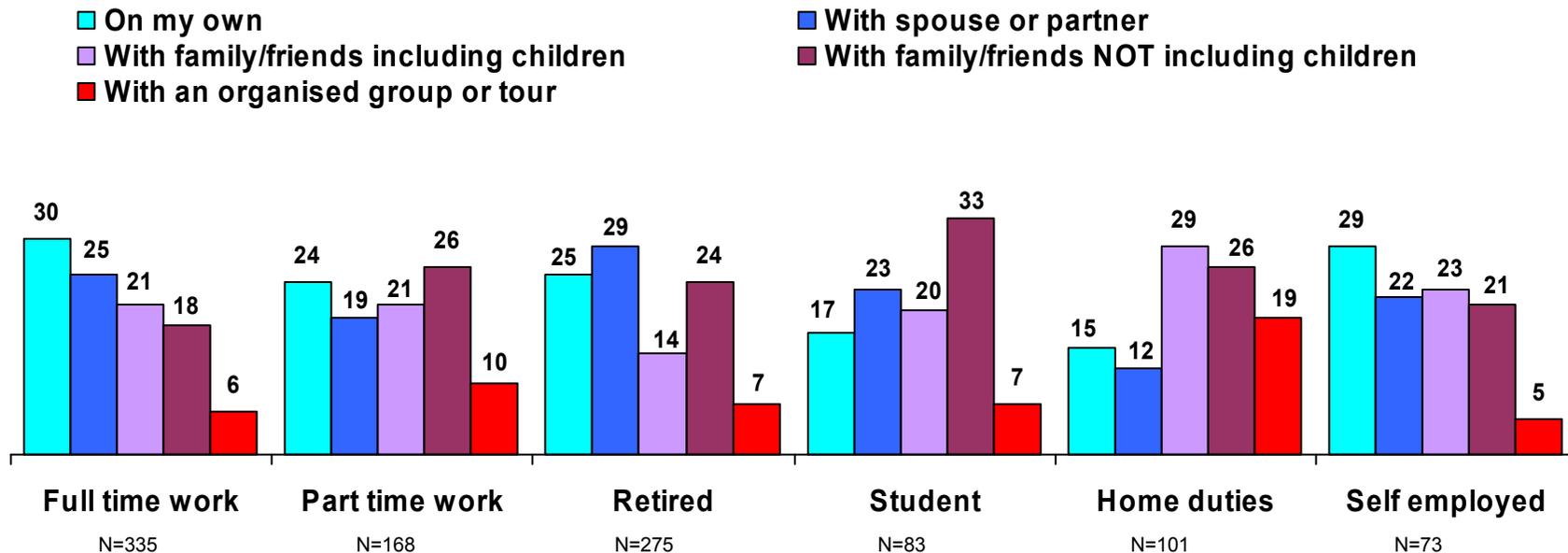
- On my own
- With spouse or partner
- With family/friends including children
- With family/friends NOT including children
- With an organised group or tour



Who Visiting With

Western Sydney: Effect of Employment Status on Who Accompanies the Visitors

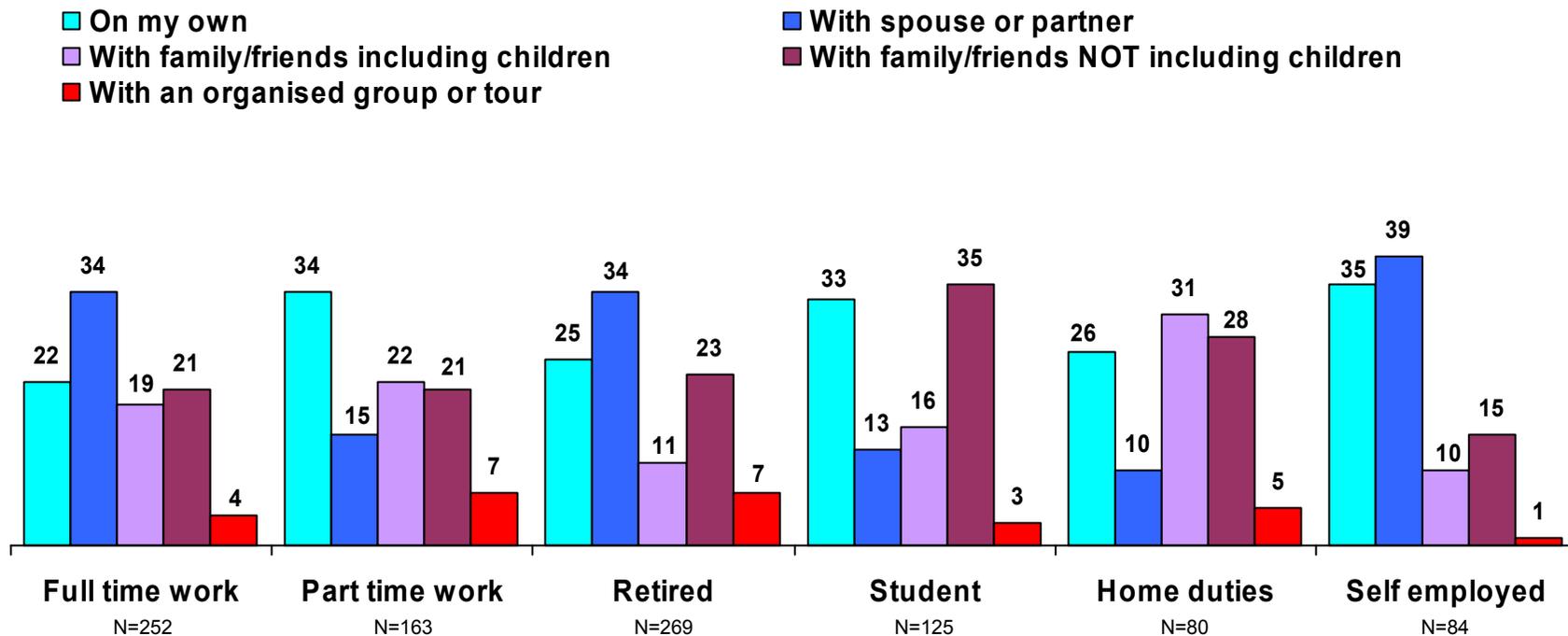
- Full-time workers and the self-employed were the most likely groups to visit alone.
- Those undertaking home duties and students were most likely to visit with family/friends.
- Those undertaking home duties were the most likely group to visit with children, and 1 in 5 visited with an organised group or tour.
- Retirees were the group most likely to visit with a spouse or partner.



Who Visiting With

Hunter: Effect of Employment Status on Who Accompanies the Visitors

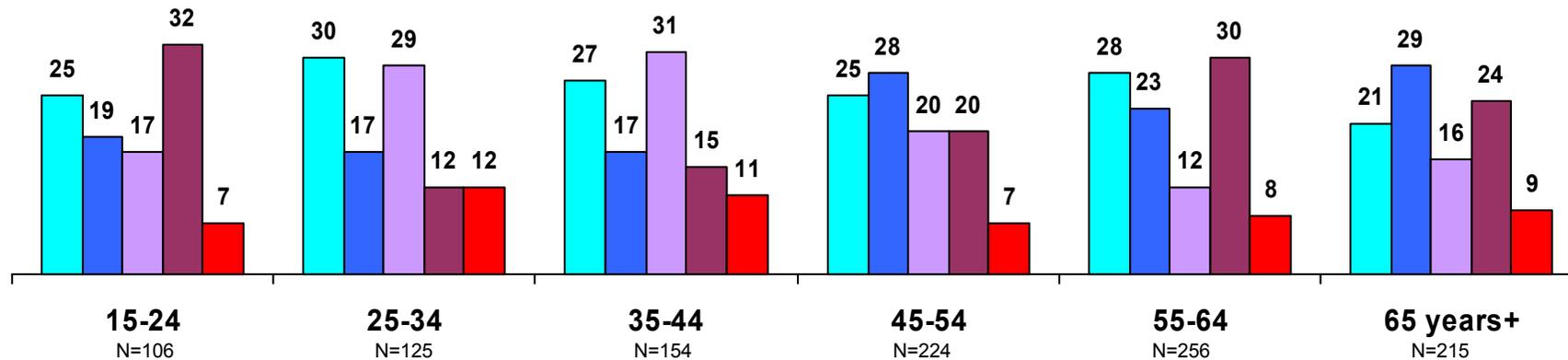
- *One third of full-time workers and retirees visited with their spouse/partner.*
- *One third of part-time workers visited alone.*
- *Students were almost as likely to visit alone as with family/friends (not including children).*
- *1 in 3 of those undertaking home duties visited with children, a much higher proportion than any other group.*
- *The majority of self-employed visitors came alone or with a spouse/partner.*



Who Visiting With

Western Sydney: Differences by Age on Who Accompanies the Visitors

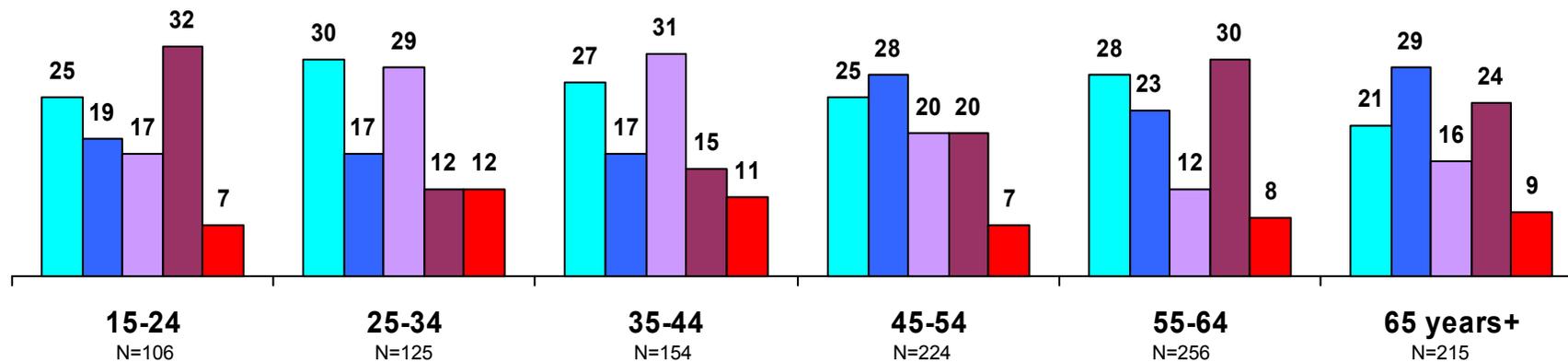
- 15-24 and 55-64 more likely to visit with family/friends without children.
- Young (15-24) and elderly (65+) less likely to come alone.
- Trend with age – those over 45 are much more likely to come with a spouse/partner than younger age groups.



Who Visiting With

Western Sydney: Differences by Age on Who Accompanies the Visitors

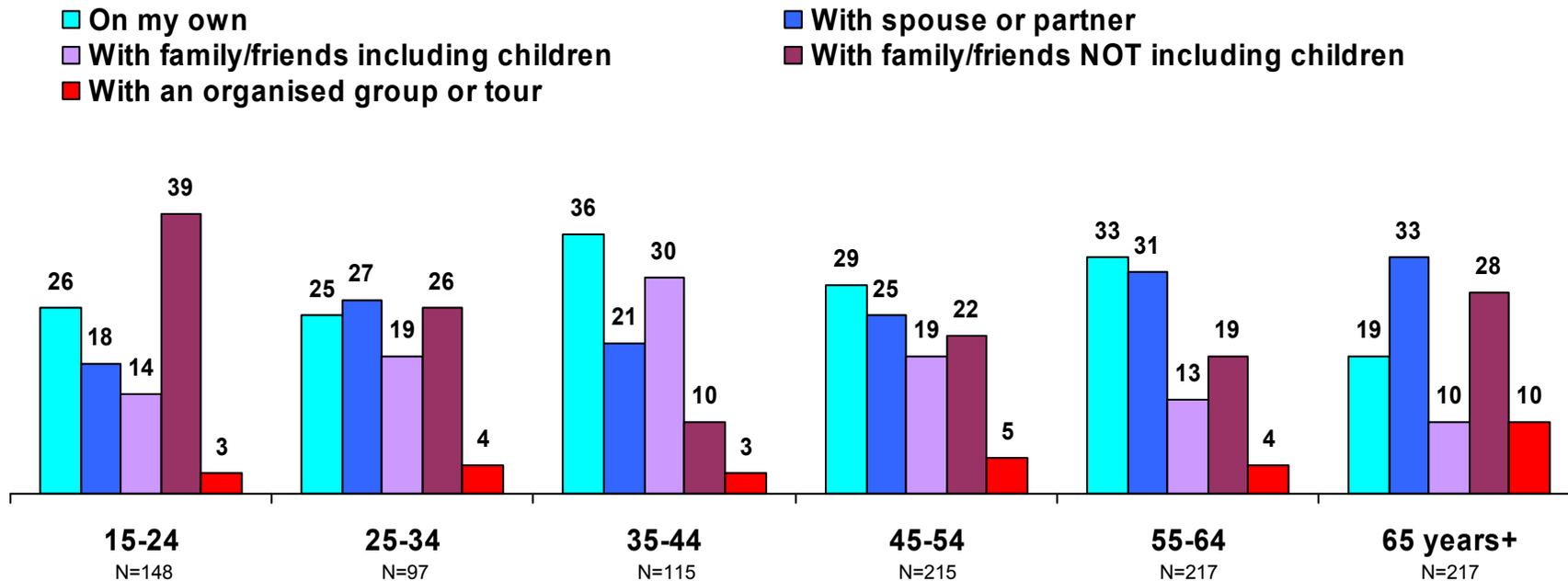
- 15-24 and 55-64 more likely to visit with family/friends without children.
- Young (15-24) and elderly (65+) less likely to come alone.
- Trend with age – those over 45 are much more likely to come with a spouse/partner than younger age groups.



Who Visiting With

Hunter: Differences by Age on Who Accompanies the Visitors

- 15-24 are the group most likely to visit with family/friends without children.
- Those over 55 are more likely to come with a spouse/partner than younger age groups
- The over 65s are much less likely to come alone, however 55-64s are as likely to visit alone as with a spouse/partner.
- Those in the 35-44 age group were far more likely than any other age group to visit with children, while over a third visited alone.



Who Visiting With

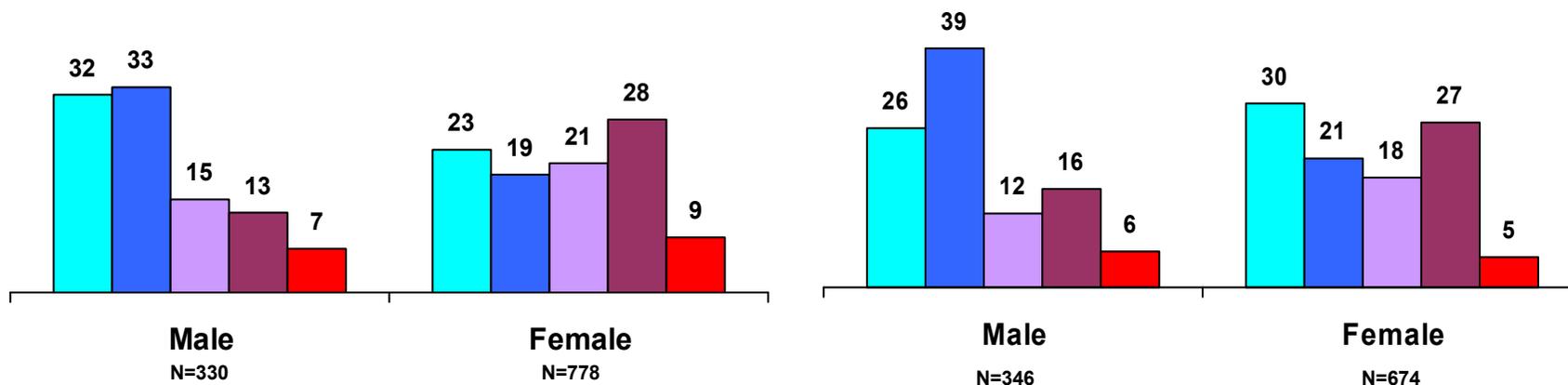
Breakdown by Gender

- When males go to the gallery/museum, they are more likely to in the presence of their partner.
- Females in both regions are more likely to go with family/friends NOT including children.
- Men in Western Sydney are more likely to go alone than women.

Western Sydney

Hunter

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



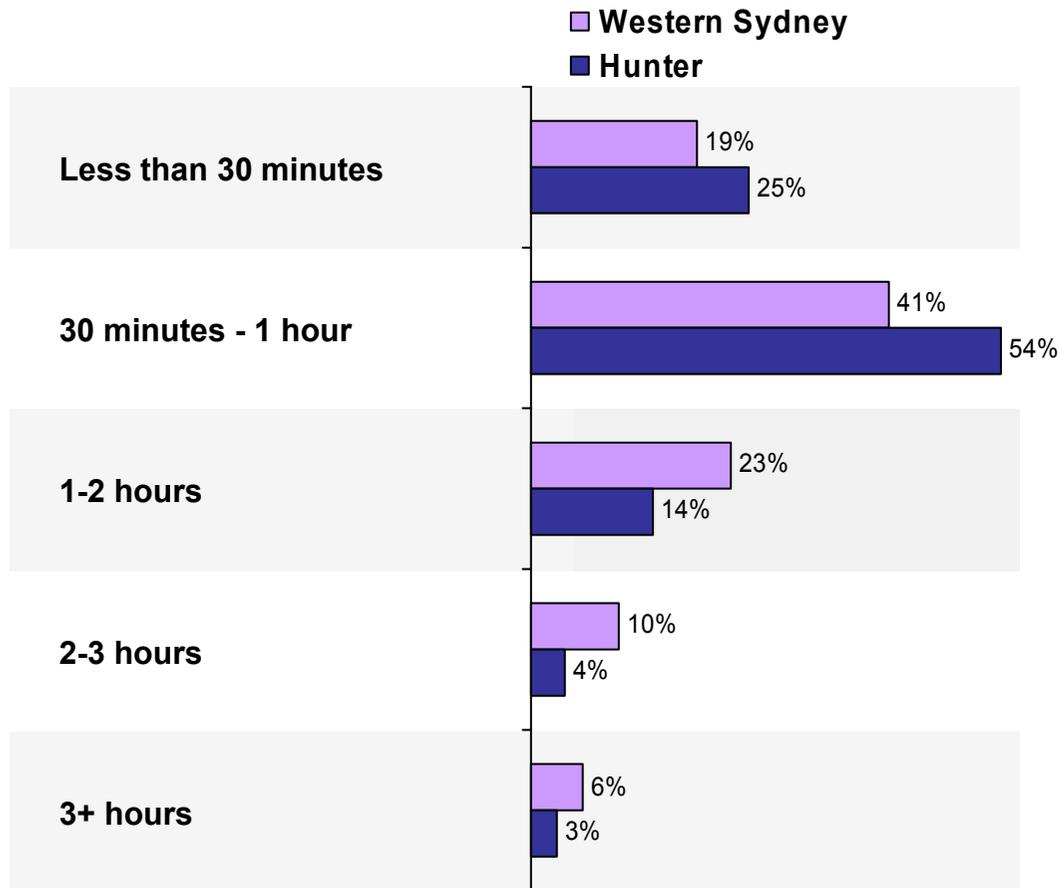
Visitor Behaviour

- *How Long Did They Stay?*
- *Did They Attend A Workshop?*



Photo courtesy of Blacktown Arts Centre. Photo by Adam Hollingsworth.

Length Of Visit



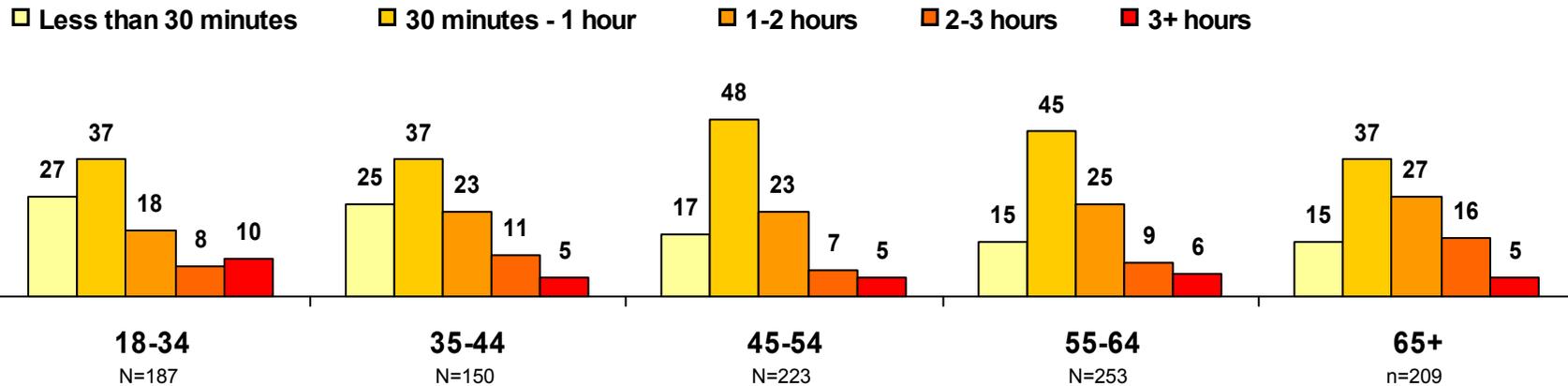
- The most common visit length for both regions was 30-60 minutes
BUT
- Western Sydney visitors are more likely to spend longer at galleries/museums than Hunter visitors.
- 79% of Hunter visitors spend up to one hour in the gallery/museum, while 39% of Western Sydney visitors spend more than an hour in the gallery/museum.
- Men are much more likely than women to spend less than 30 minutes in the gallery/museum.

Length of Visit

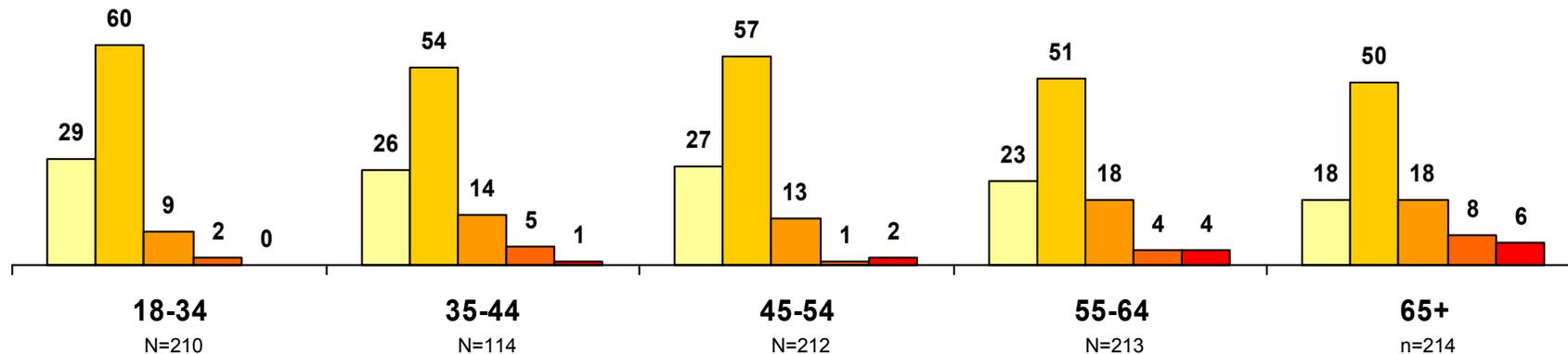
Breakdown by Age

- The most common length of visit across all age groups is 30-60 minutes.
- In Western Sydney, under 44s visit for shorter periods than older age groups.
- Across both regions, 65+ are significantly more likely to spend longer periods in the galleries.

Western Sydney



Hunter



Q.4: How long was your visit today?

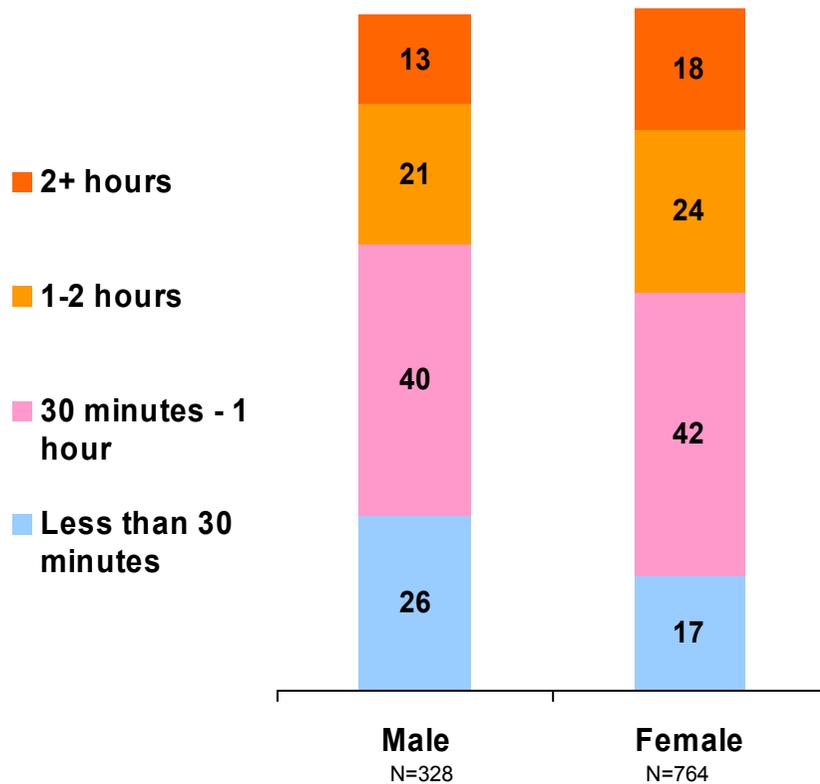
Base: All valid responses

Length of Visit

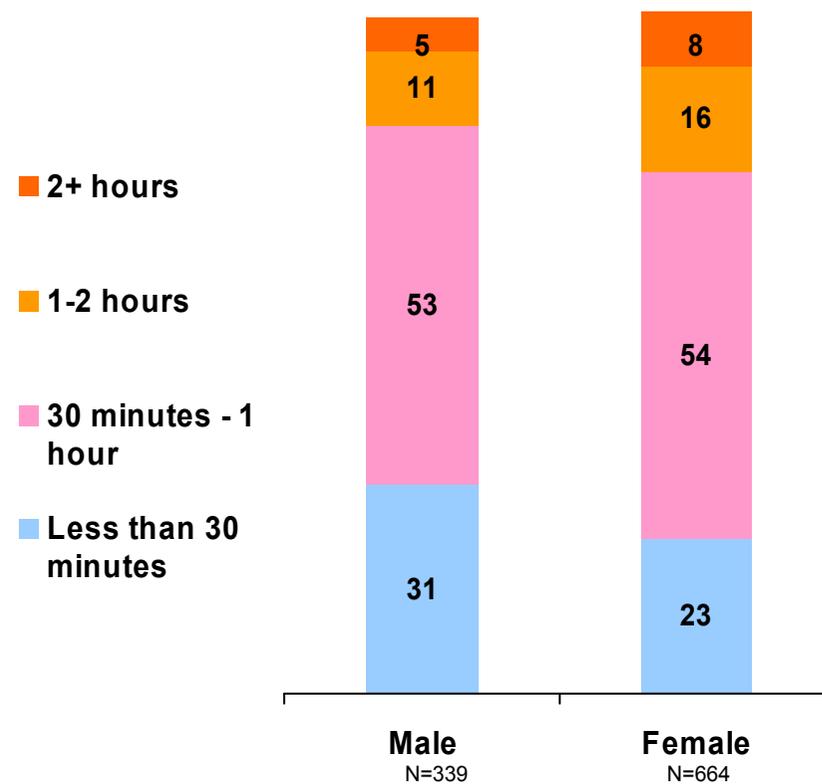
Breakdown by gender

- Men spend markedly less time in the galleries than women – across both regions.

Western Sydney



Hunter

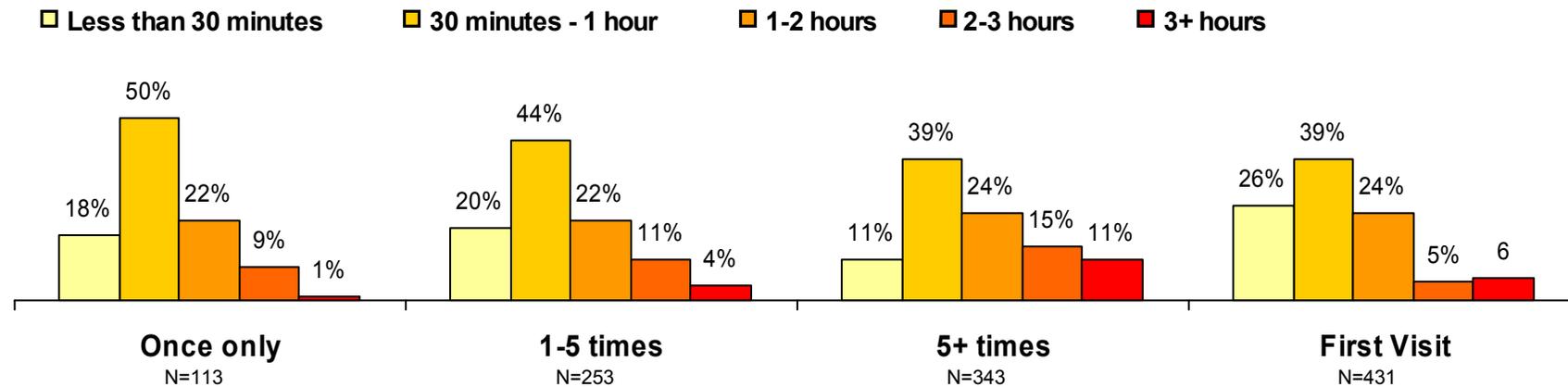


Length of Visit

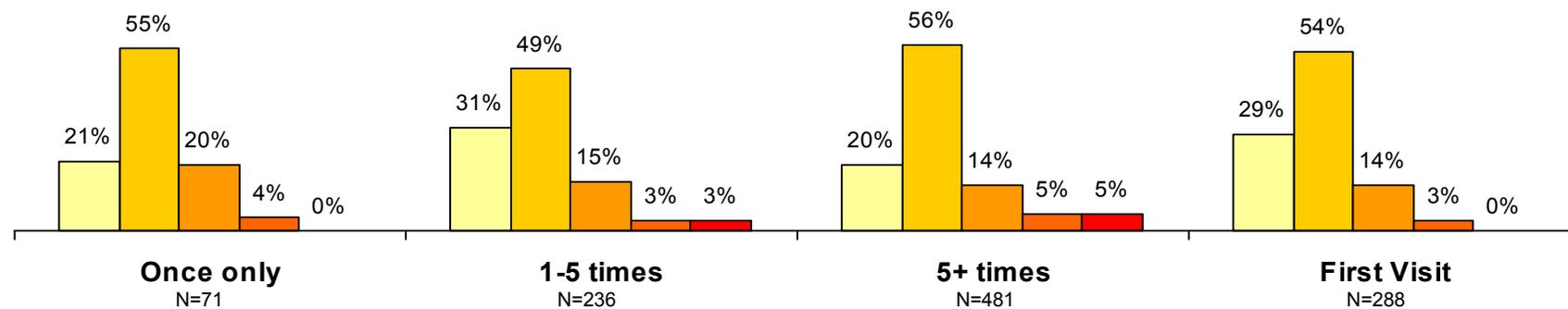
Breakdown by Number of Visits

- People who haven't visited before, are most likely to spend less than 30 minutes.
- Those who have been more than 5 times are most likely to spend more than 2 hours.

Western Sydney



Hunter

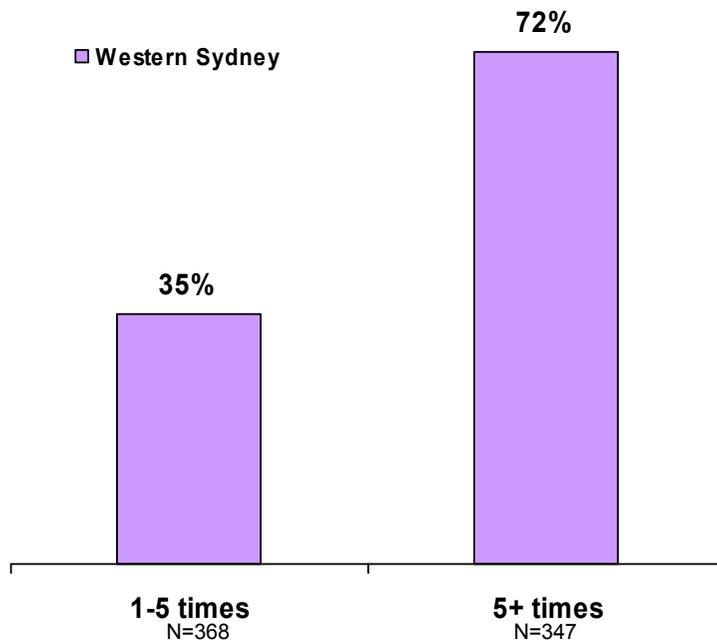


Workshop Attendance

Western Sydney

Overall attendance is **36%** (n=1157)

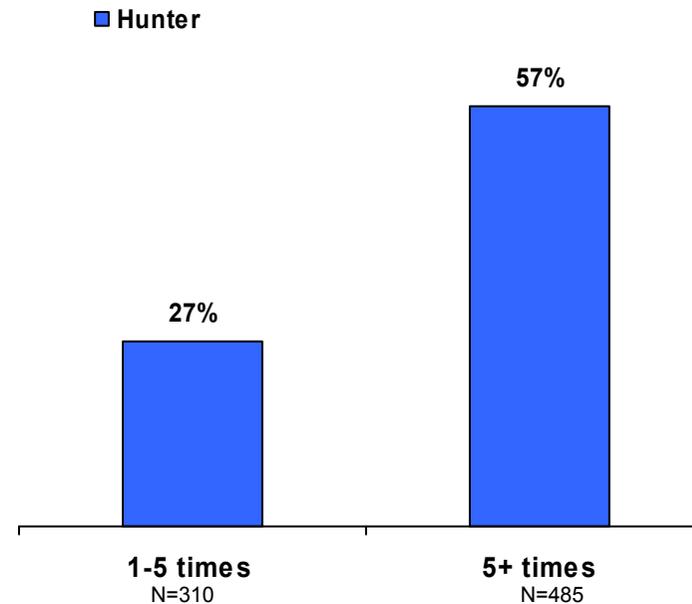
Breakdown by number of visits



Hunter

Overall attendance is **34%** (n=1090)

Breakdown by number of visits



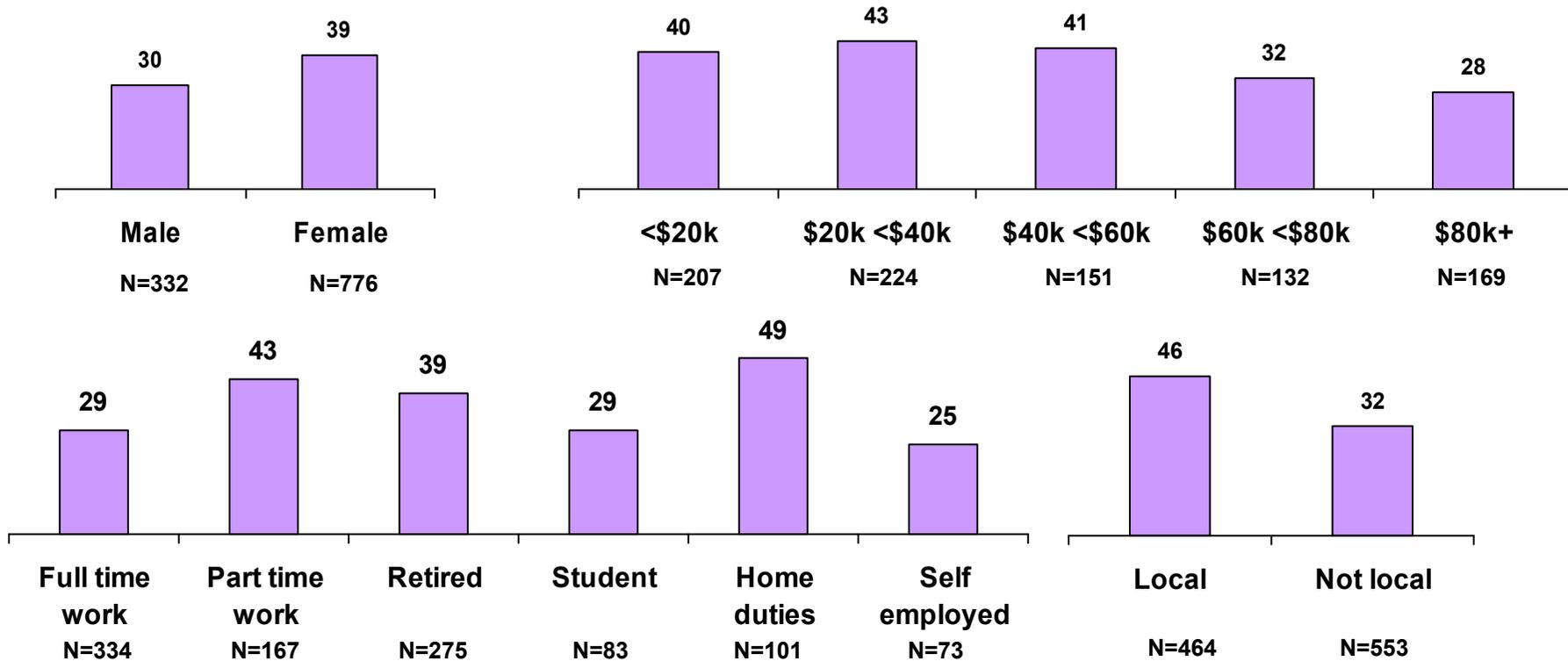
- *Those who visited the gallery 5+ times were much more likely to attend a workshop or activity than those who had visited 1-5 times.*
- *In Western Sydney, around three quarters of those who had visited the gallery 5+ times had attended a workshop or activity.*

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

Base: All valid responses

Workshop Attendance

Western Sydney Breakdowns – Who’s more likely to attend?



- *Women are slightly more likely to attend workshops than men.*
- *Lower income groups are more likely to attend workshops.*
- *Home duties, part-time workers and retirees are more likely to attend.*

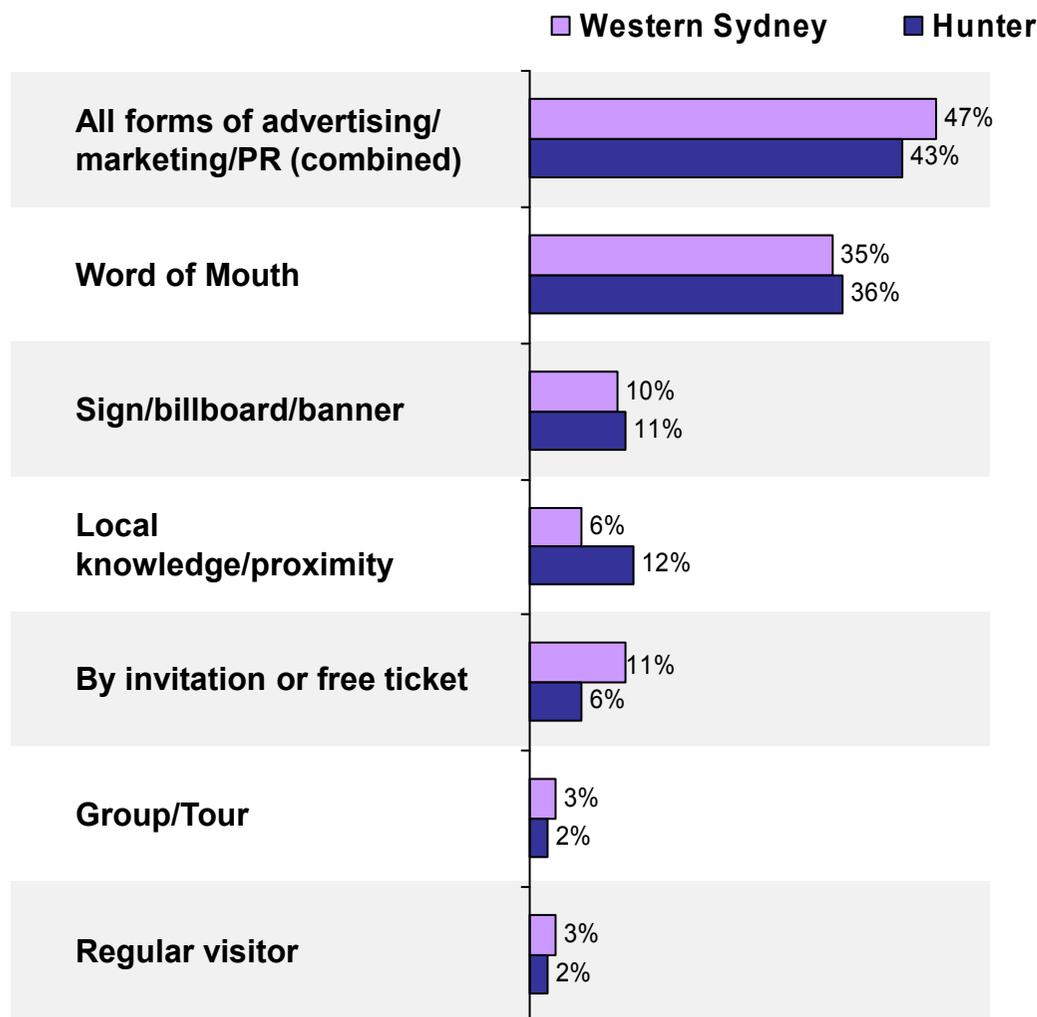
Information, Interests and Motivations

M&G NSW



Photo courtesy of Penrith Regional Gallery & The Lewers Bequest.

Sources of Information



Only responses above 1% shown

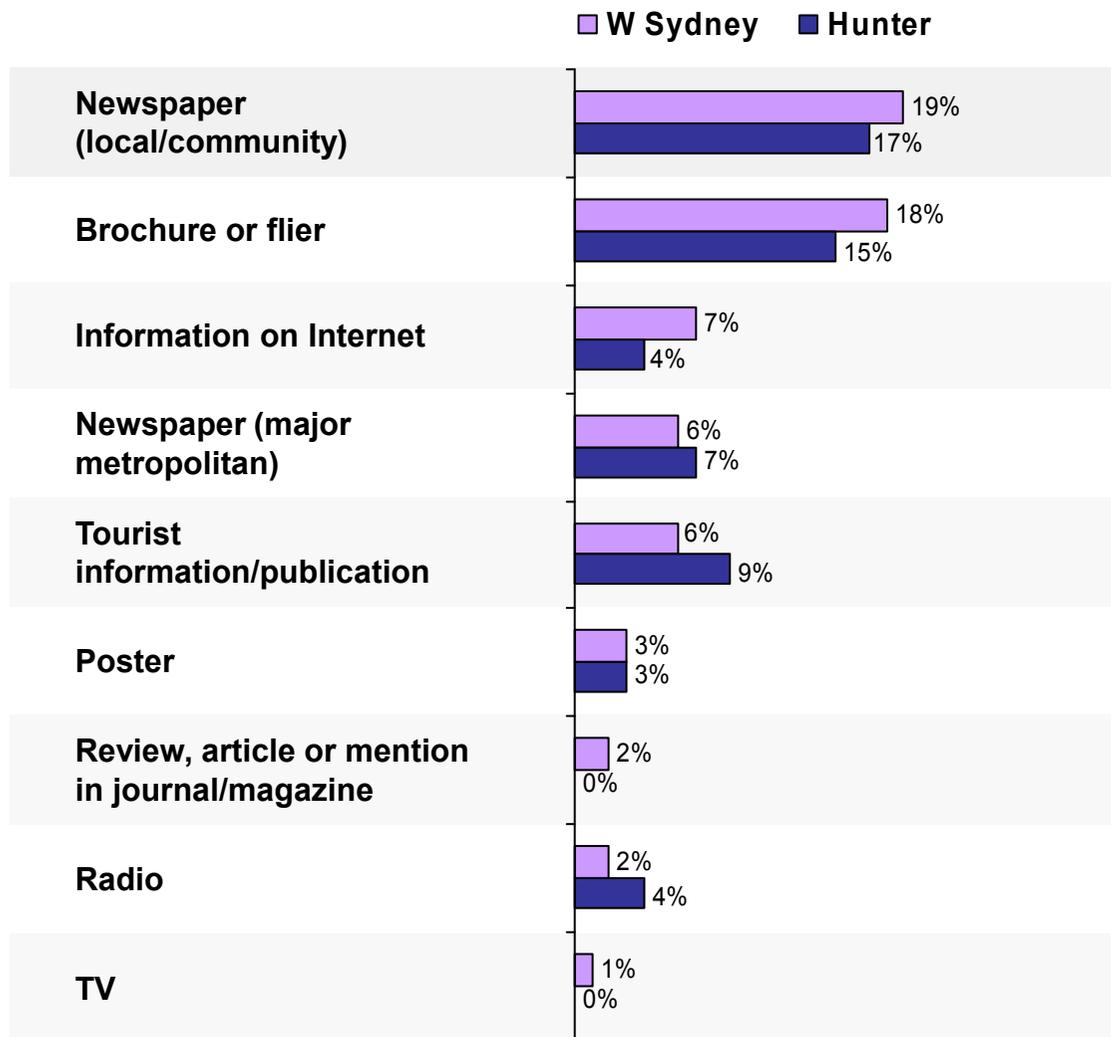
- Word of mouth was the most common source of information about regional galleries.
- When all the different forms of advertising, marketing and PR are combined, this becomes the top source of information, though derived from a number of different sources.

Q.6: How did you hear about this gallery/museum or this exhibition?
(Multiple Response)

Base: All valid responses; N=1138, W. Sydney; N=1061, Hunter

Sources of Information

Assessing Visitor Awareness of Gallery Advertising and Marketing



- The local press, brochures and fliers appear to be the most effective sources of advertising and PR for these regional galleries.

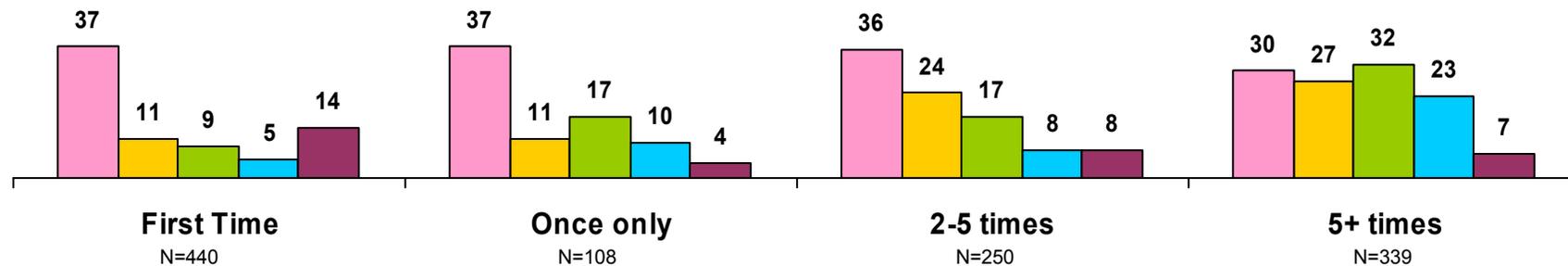
Q.6: How did you hear about this gallery/museum or this exhibition?
(Multiple Response)

Base: All valid responses; N=1138, W. Sydney; N=1061, Hunter

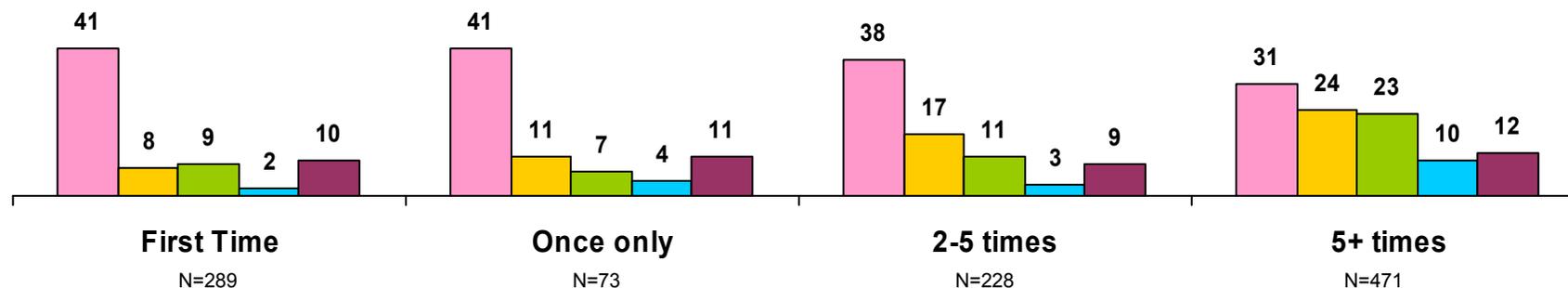
Sources of Information

- Regular visitors are more likely to be using the local newspaper and brochures to find information about the gallery.
- Regular visitors are also more likely to receive a free ticket or invitation to the gallery.

Western Sydney



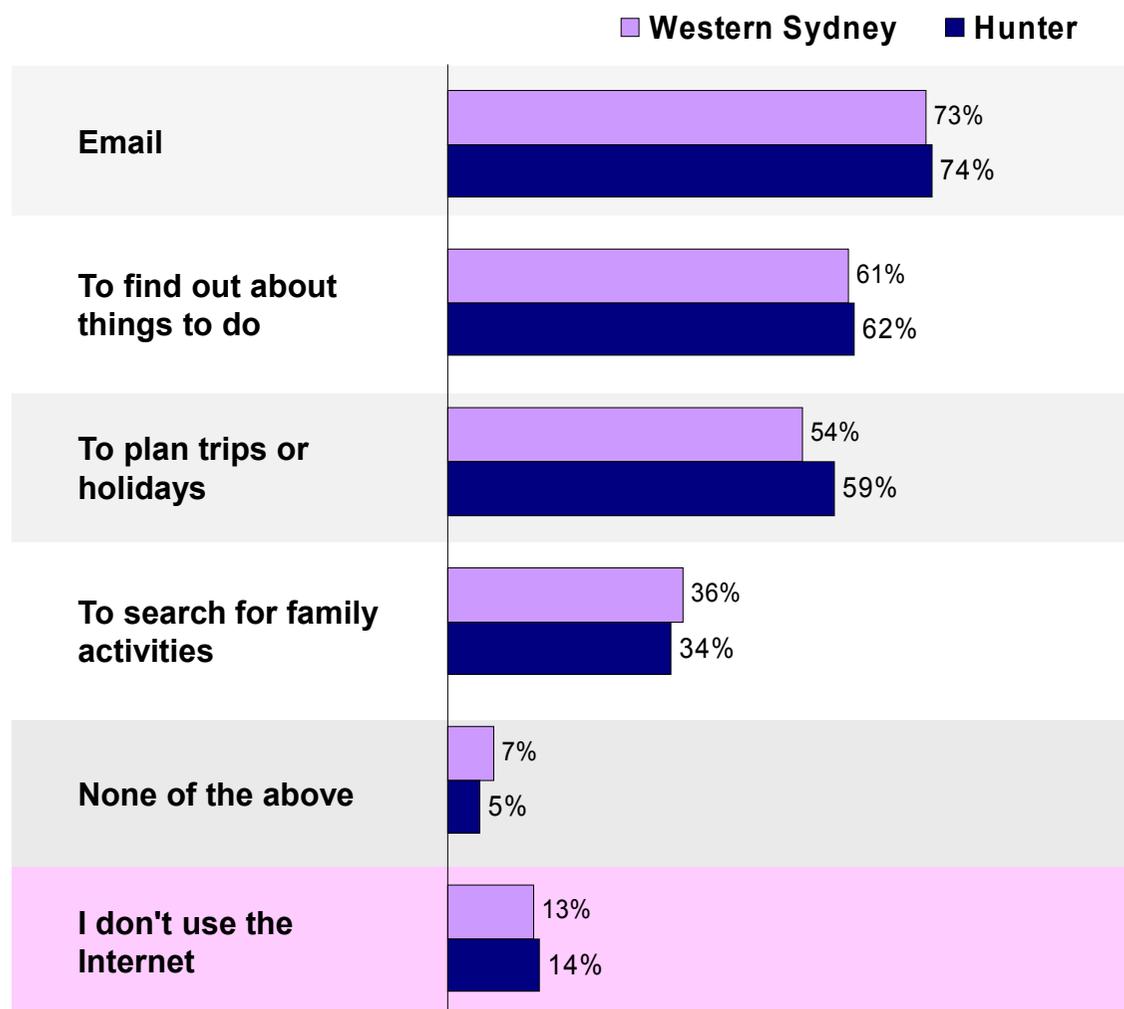
Hunter



Information on the Internet

- Regional galleries and museums face challenges relating to their online presence.
- A very small proportion of visitors learned about the gallery or exhibition they attended through the Internet (7% in Western Sydney, 4% in the Hunter).
- Some, but not all of the galleries surveyed, have email lists.
- None of the galleries and museums surveyed have a stand-alone website. All have web pages housed and managed by their local council.
- Some problems with council website housing:
 - Web addresses are long, complex and cumbersome.
 - None of the galleries or museums had the online facility to allow web visitors to sign up online to mailing and email lists.
 - Navigation issues include confusion between gallery and council menus, information that is not updated regularly, problems with navigating the gallery pages, lack of interactivity on many of the sites.
 - Some galleries could not even track the number of hits on their web pages.
 - Some local councils have Facebook (and other Internet site) bans and exclusions, which can make it difficult for staff to create a social media presence for their gallery.

Use of the Internet



- Three quarters of visitors reported using email.
- Over 60% said they use the Internet to find out about things to do.
- Over half said they use the Internet to plan trips or holidays.
- Over a third said they use the Internet to search for family activities.
- More than 1 in 10 visitors did not use the Internet at all.

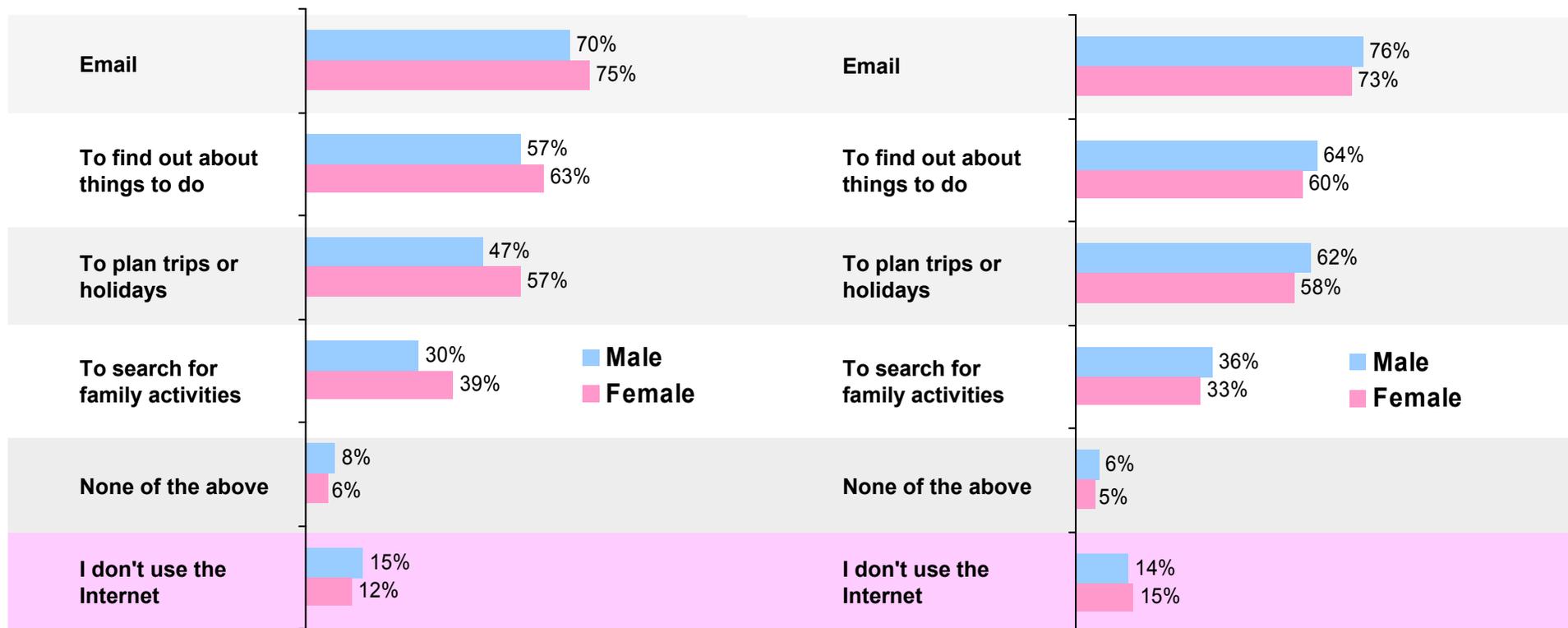
Use of the Internet

Breakdown by gender

- *Women in Western Sydney are more likely than men to use the Internet for email, to find out about things to do, to plan trips or holidays and to search for family activities.*
- *In the Hunter, women are slightly less likely than men to use the Internet for all activities listed.*

Western Sydney

Hunter



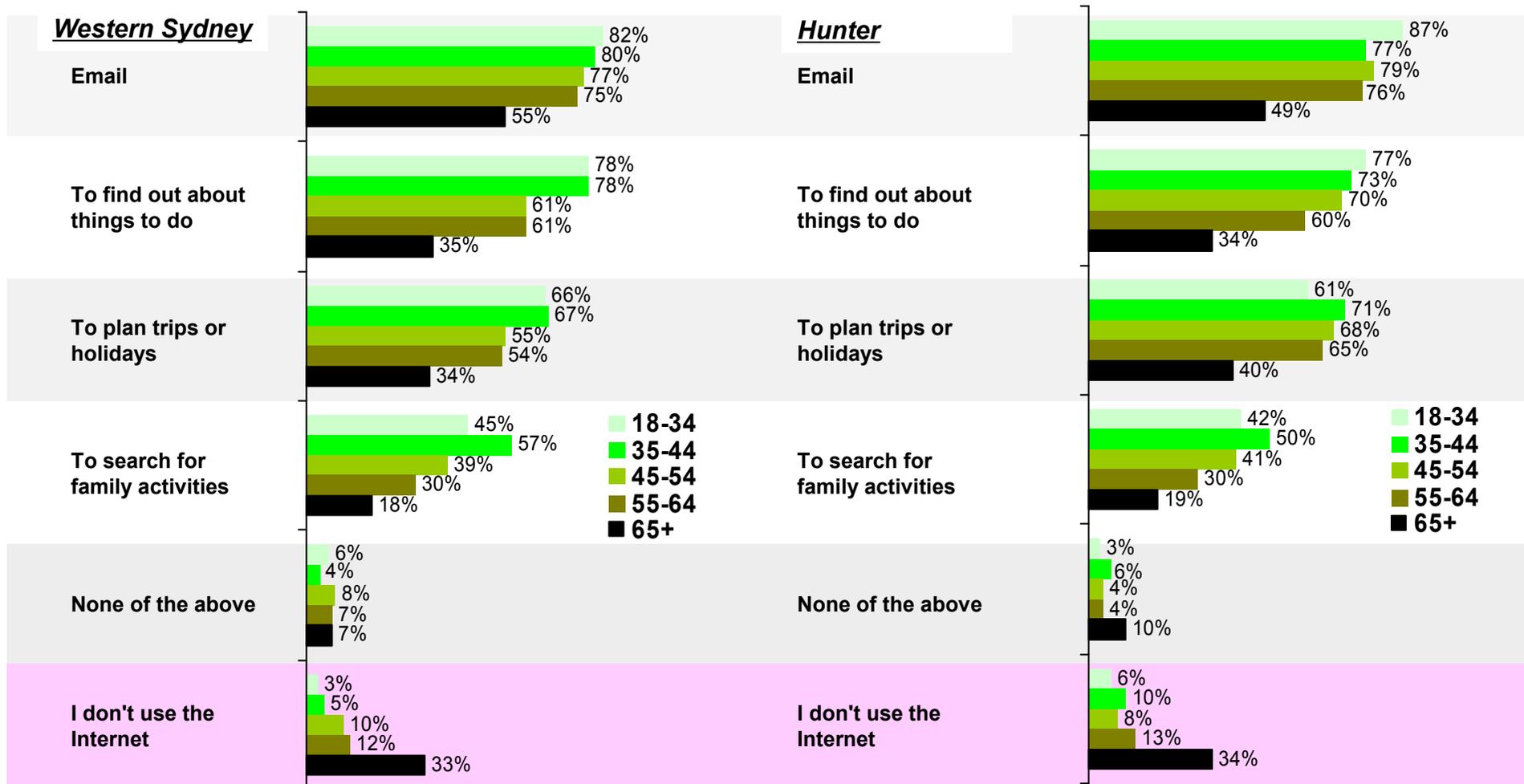
N=332 (male), N=763 (female)

N=338 (male), N=647 (female)

Use of the Internet

Breakdown by Age

- One third of visitors over the age of 65 said they do not use the Internet at all.
- Under 35s in both regions have the highest rates of email usage and use of the Internet to find out about things to do.
- 35-44s have the highest rates of using the Internet to plan trips or holidays and to search for family activities.



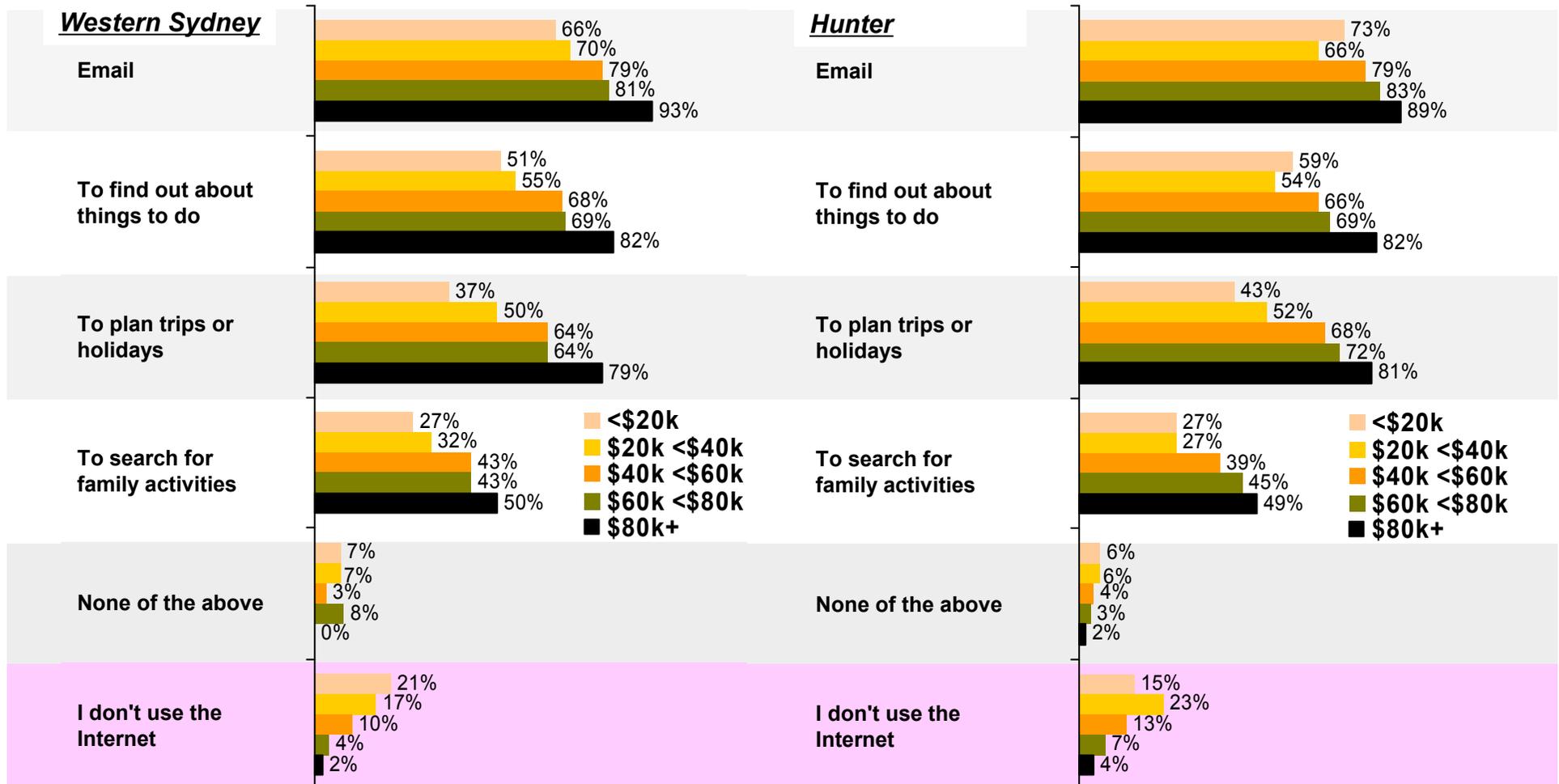
All figures are %'s of total base:
 N=179 (18-34), N = 147 (35-44), N= 220 (45-54), N=246 (55-64), N=202 (65+)

All figures are %'s of total base:
 N=207 (18-34), N = 109 (35-44), N= 203 (45-54), N=204 (55-64), n=193 (65+)

Use of the Internet

Breakdown by Income Bracket

- Those earning over \$80K have the highest rates of Internet usage for all categories.



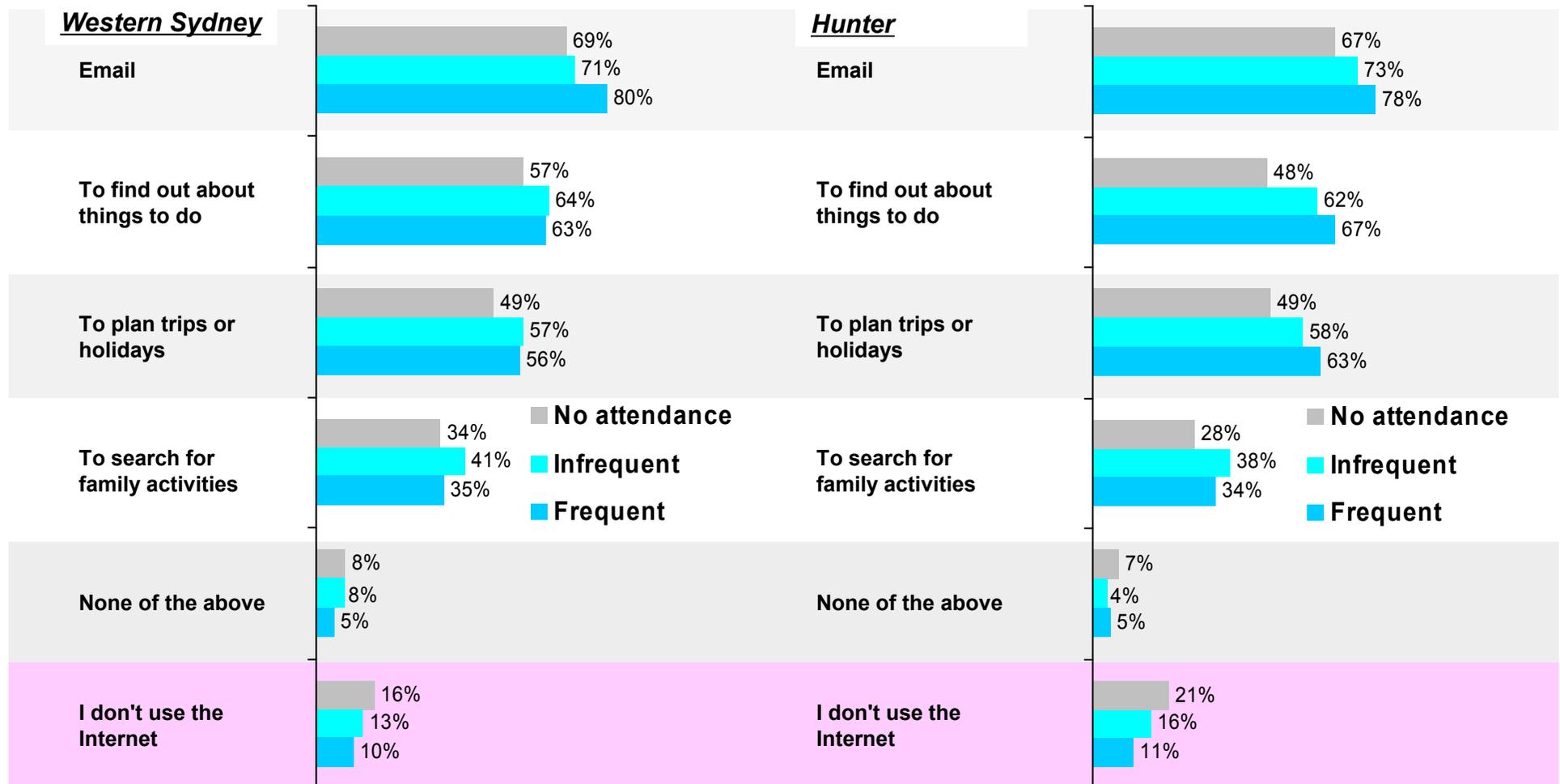
All figures are %'s of total base: N=198 (<\$20K), N=213 (\$20K<\$40K), N= 148 (\$40K<\$60K), N=127 (\$60K-<\$80K), N=164 (\$80K)

All figures are %'s of total base: N=175 (<\$20K), N =204 (\$20K<\$40K), N= 152 (\$40K<\$60K), N=98 (\$60K-<\$80K), N=159 (\$80K)

Use of the Internet

Breakdown by frequency of visitation (Q1)

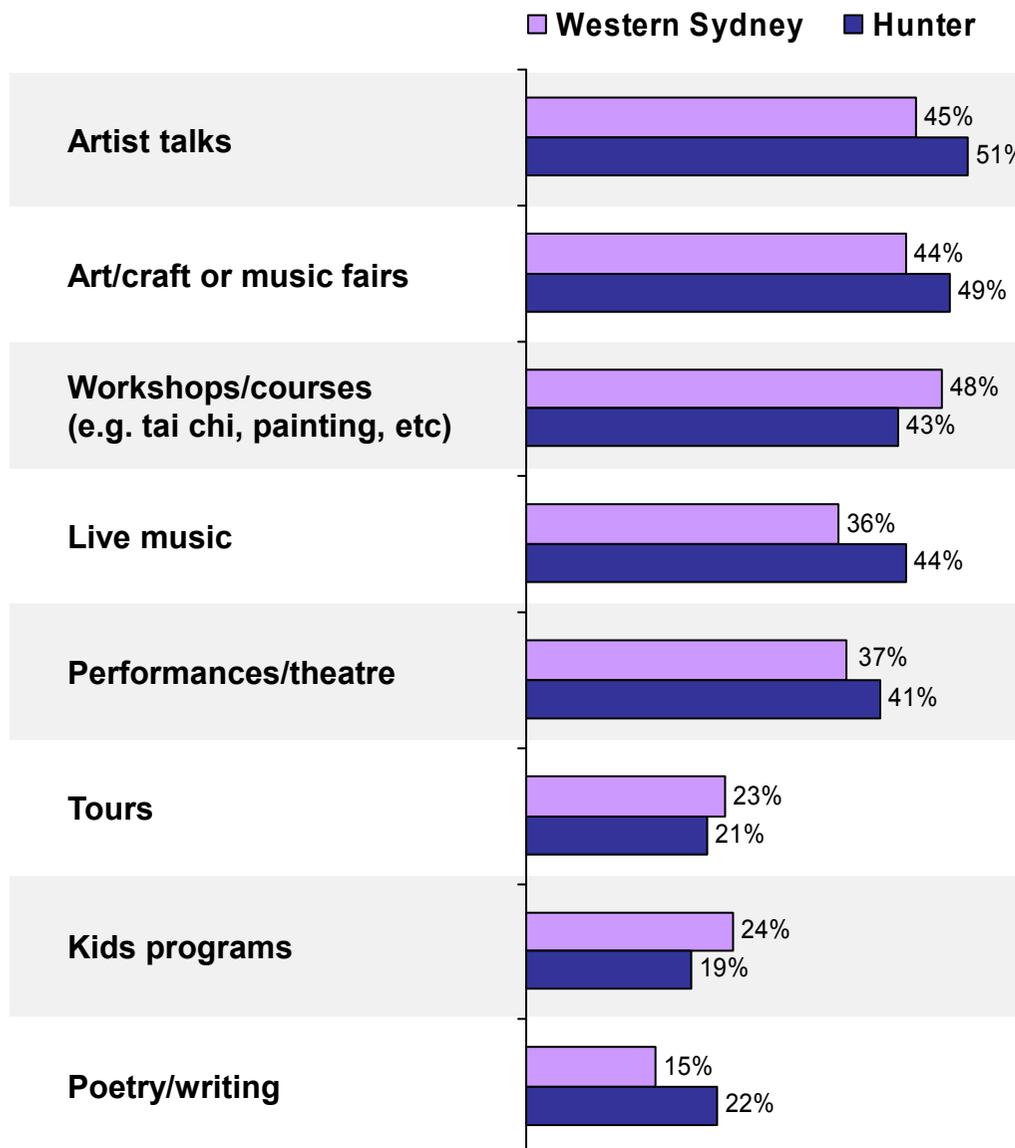
- Those who attend the gallery more frequently are more likely to use email than those who attend less frequently.
- Those who attend infrequently are more likely to search for family activities on the Internet.



All figures are %'s of total base:
N= 195 (no attendance), N= 398 (Infrequent), n=410 (Frequent)

All figures are %'s of total base:
N= 107 (No attendance), N=365 (infrequent), N=471 (Frequent)

Programs of Interest



Q.7. What programs and workshops would you or your family like to attend here? (Multiple Response)

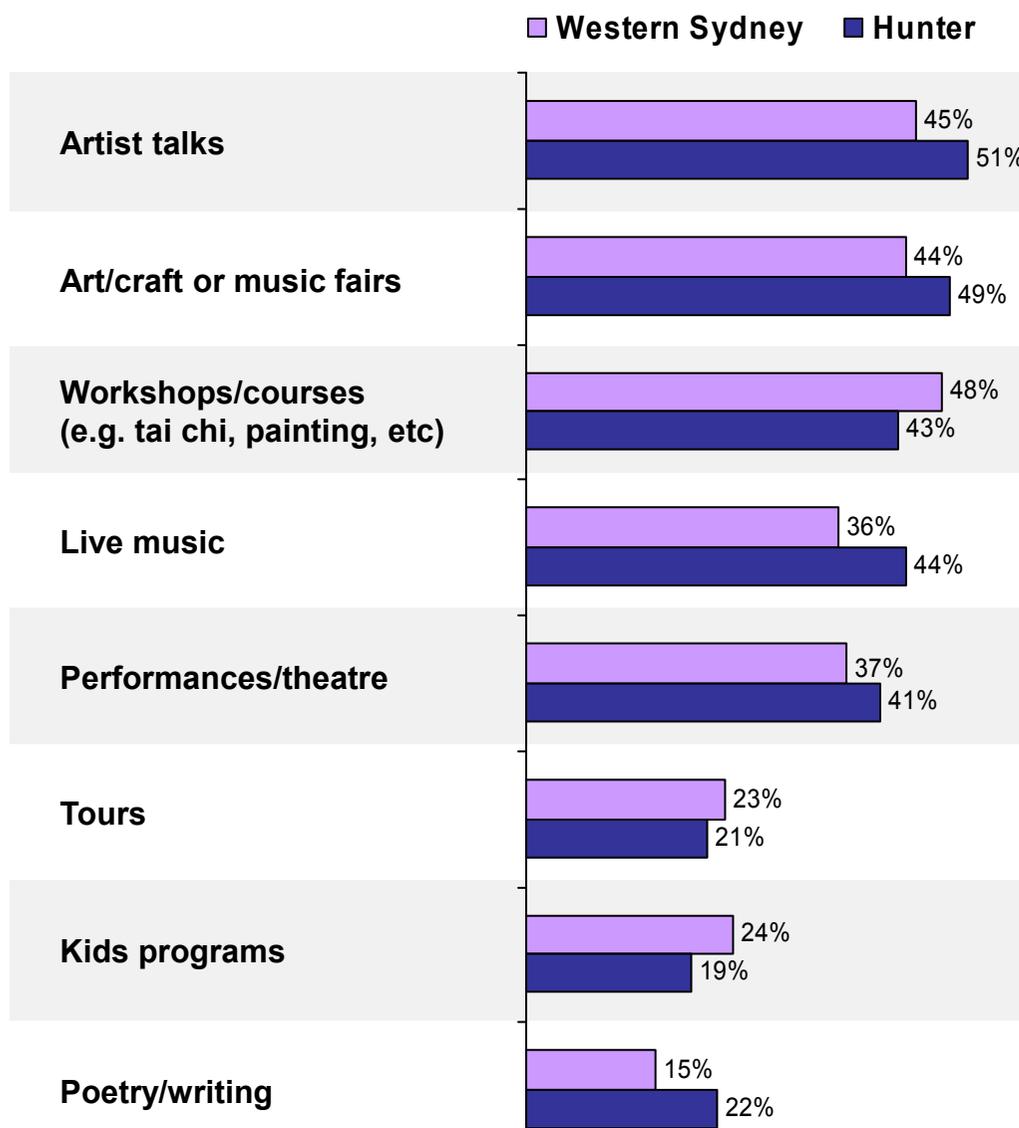
Western Sydney

Breakdowns (not shown on graph)

- 18-34s are the age group most interested in workshops and courses, while over 65s are the least interested. Women are more interested in workshops and courses than men.
- 45-54s are most interested in art/craft or music fairs, while women and local residents are far more interested than men and non-locals.
- 18-44s show the most interest in kids programs. One third of 18-34s and half the 35-44s said they were interested in kids programs.
- Locals and NSW residents showed far more interest in gallery tours than interstate and overseas visitors.
- Higher income groups (those earning over \$80K) showed the most interest in performances/theatre.

Base: All valid responses; N=975 W. Sydney; N=960, Hunter

Programs of Interest



Hunter

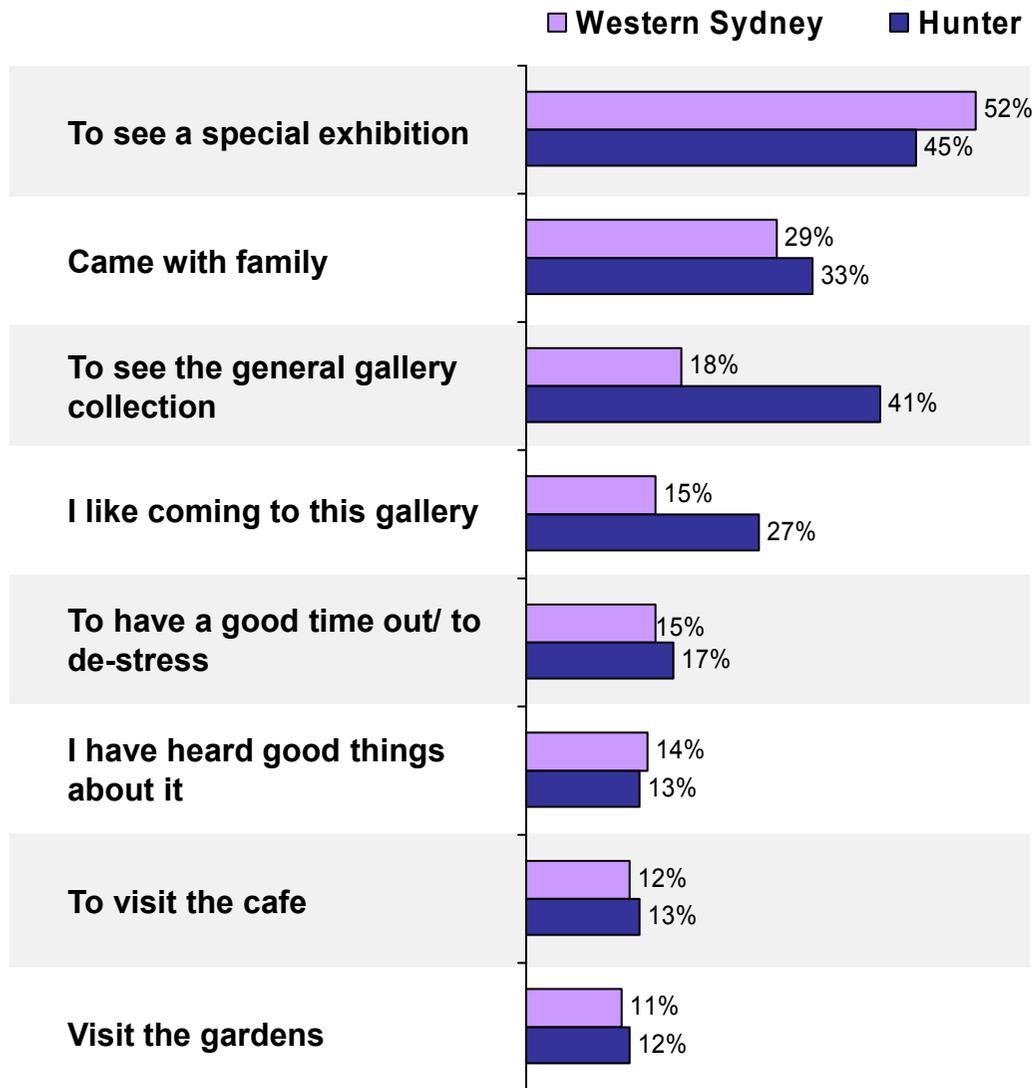
Breakdowns (not shown on graph)

- Those under the age of 65 and those earning less than \$20K are most interested in artist talks.
- 18-55s are most interested in workshops, while over-65s are least interested.
- 45-54s and 18-34s are most interested in art/craft or music fairs, and women are far more interested than men.
- Women and 18-34s are far more interested in live music at the gallery than men and older age groups.
- 18-34s and those earning under \$20K are most interested in poetry and writing.
- 35-44s are far more interested in kids programs than other age groups, with 42% expressing interest.
- Overseas visitors were most interested in gallery tours.

Q.7. What programs and workshops would you or your family like to attend here? (Multiple Response)

Base: All valid responses; N=975 W. Sydney; N=960, Hunter

Main Reasons for Visiting



Q.8. What were the **THREE MAIN** reasons you came to the gallery/museum or exhibition today? (Multiple Response)

- In the Hunter, seeing a special exhibition and visiting the general gallery collection were the top 2 reasons for visiting the gallery.
- In Western Sydney, seeing a special exhibition was clearly the top reason for visiting.
- Around 1 in 3 visitors from both regions cited coming with the family as a key reason for visiting.
- In the Hunter, 1 in 4 simply “like coming to this gallery”.

Base: All valid responses; N=1115, W. Sydney; N=1060, Hunter

Summary: Top Reasons for Visiting

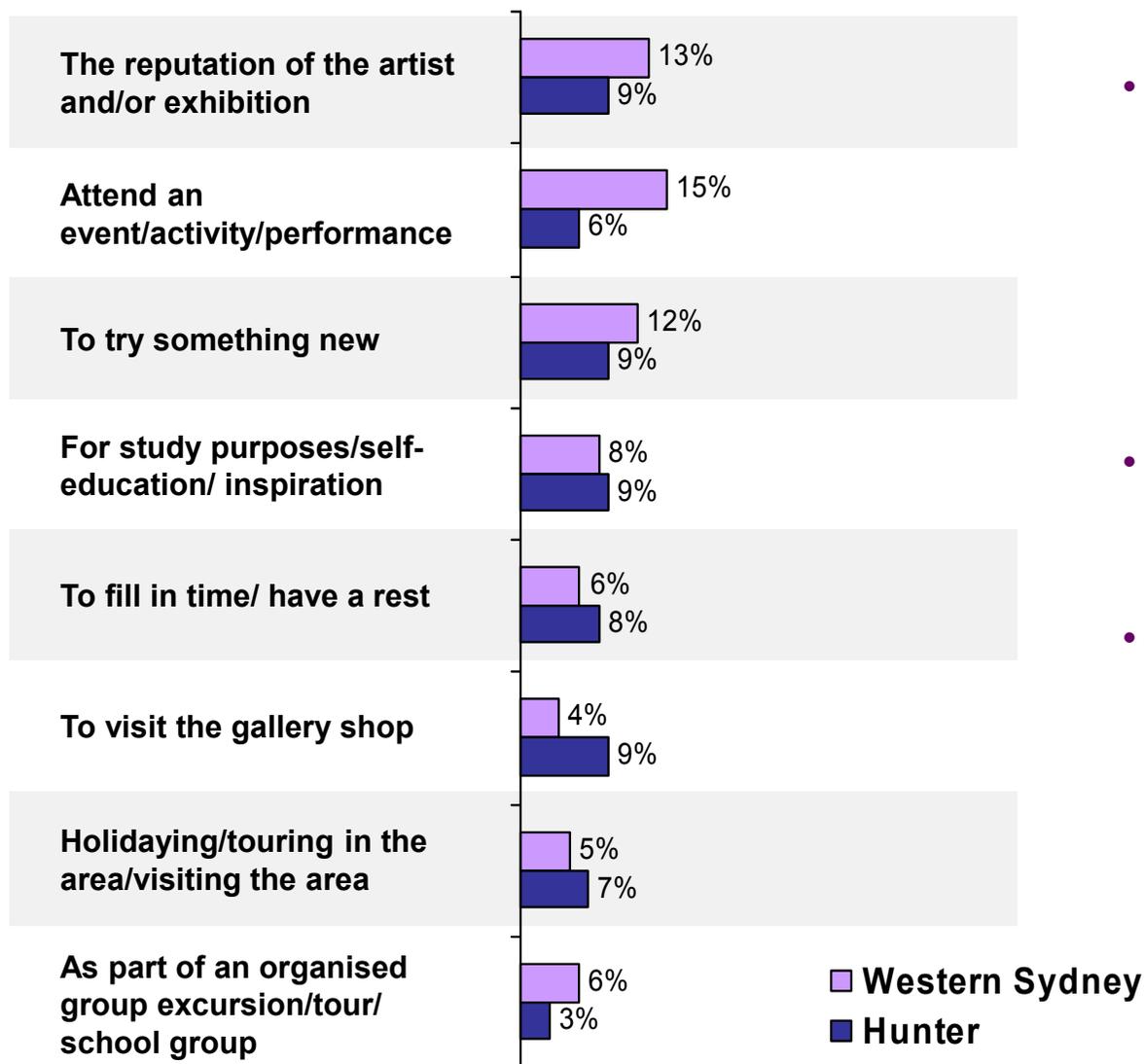
Western Sydney

- To see a special exhibition (52%)
- Came with family (29%)

Hunter

- To see a special exhibition (45%)
- To see the general gallery collection (41%)
- Came with family (33%)
- I like coming to this gallery (27%)

Other Reasons for Visiting

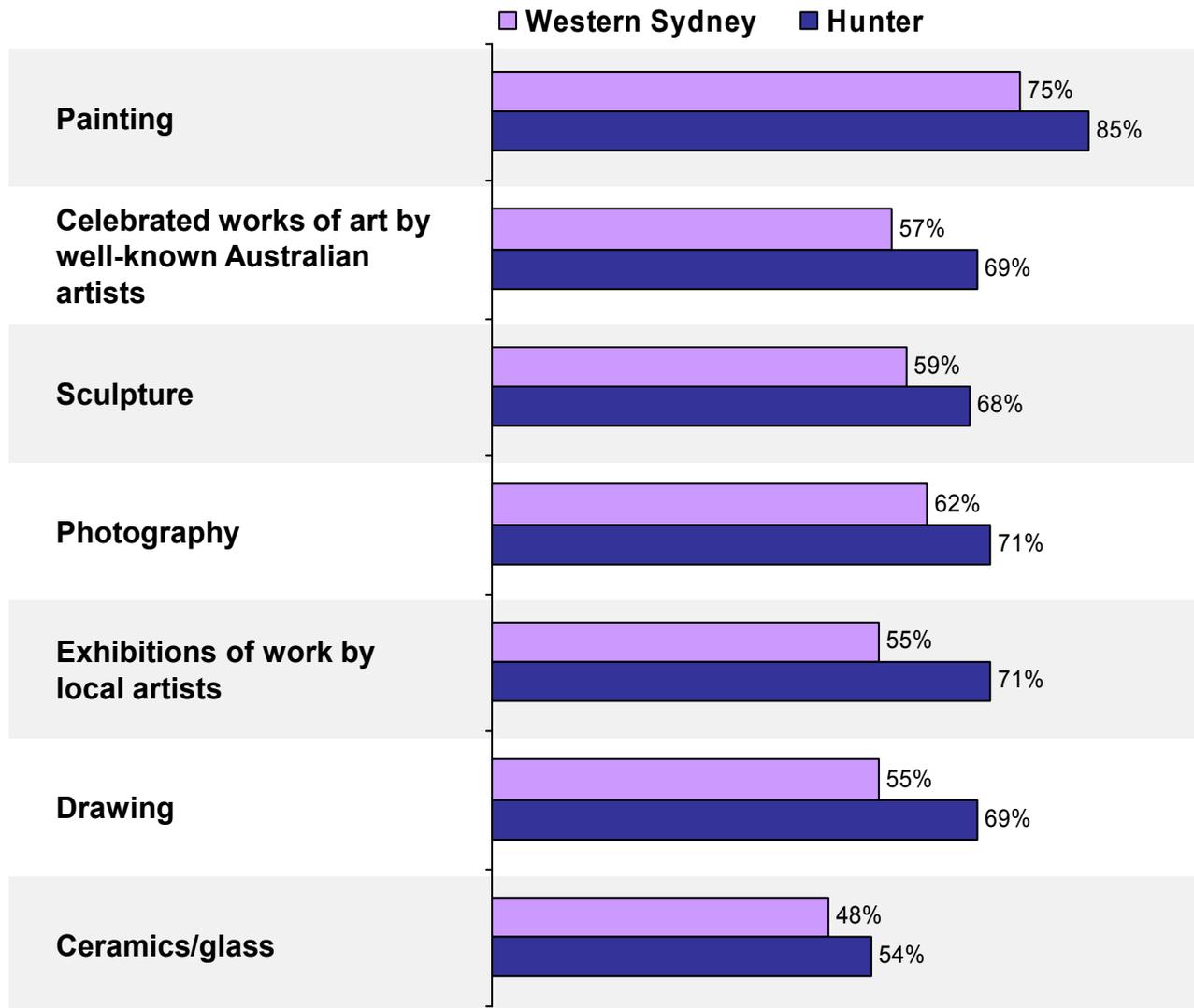


- In Western Sydney, 15% of visitors said a main reason for attending the gallery was to attend an event, activity or performance, while only 6% of Hunter visitors cited this as a main reason for attending.
- Around 1 in 10 visitors said a main reason for visiting was to try something new.
- 4 out of the 5 Hunter galleries have gift shops or gift counters. Almost 1 in 10 Hunter visitors said this was a main reason for their visit.

Q.8. What were the **THREE MAIN** reasons you came to the museum or exhibition today? (Multiple Response)

Base: All valid responses; N=1115, W. Sydney; N=1060, Hunter

Most Popular Exhibitions Desired

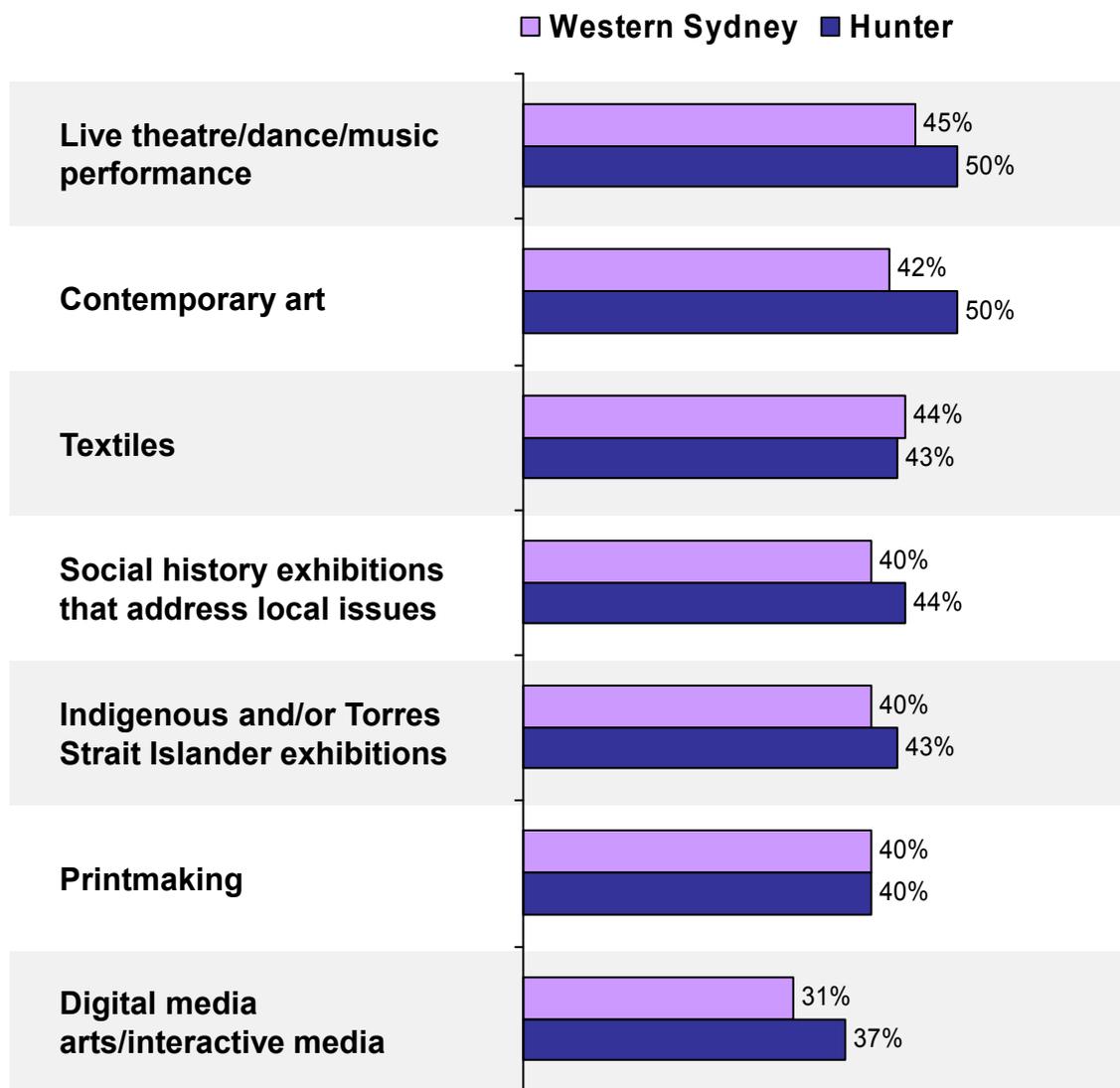


- In Western Sydney, visitors rated painting, photography and sculpture as their most popular exhibitions.
- In the Hunter, painting, photography and exhibitions of work by local artists were rated as the top three.

Q.20. What sort of exhibitions would you MOST like to see at this gallery/museum?
(Multiple Response)

Base: All valid responses; N=1069, W.Sydney;
N=998, Hunter

Other Exhibitions Desired



- In the Hunter, live performance, contemporary art and digital media arts appear to be a little more popular than in Western Sydney.

Q.20. What sort of exhibitions would you MOST like to see at this gallery?
(Multiple Response)

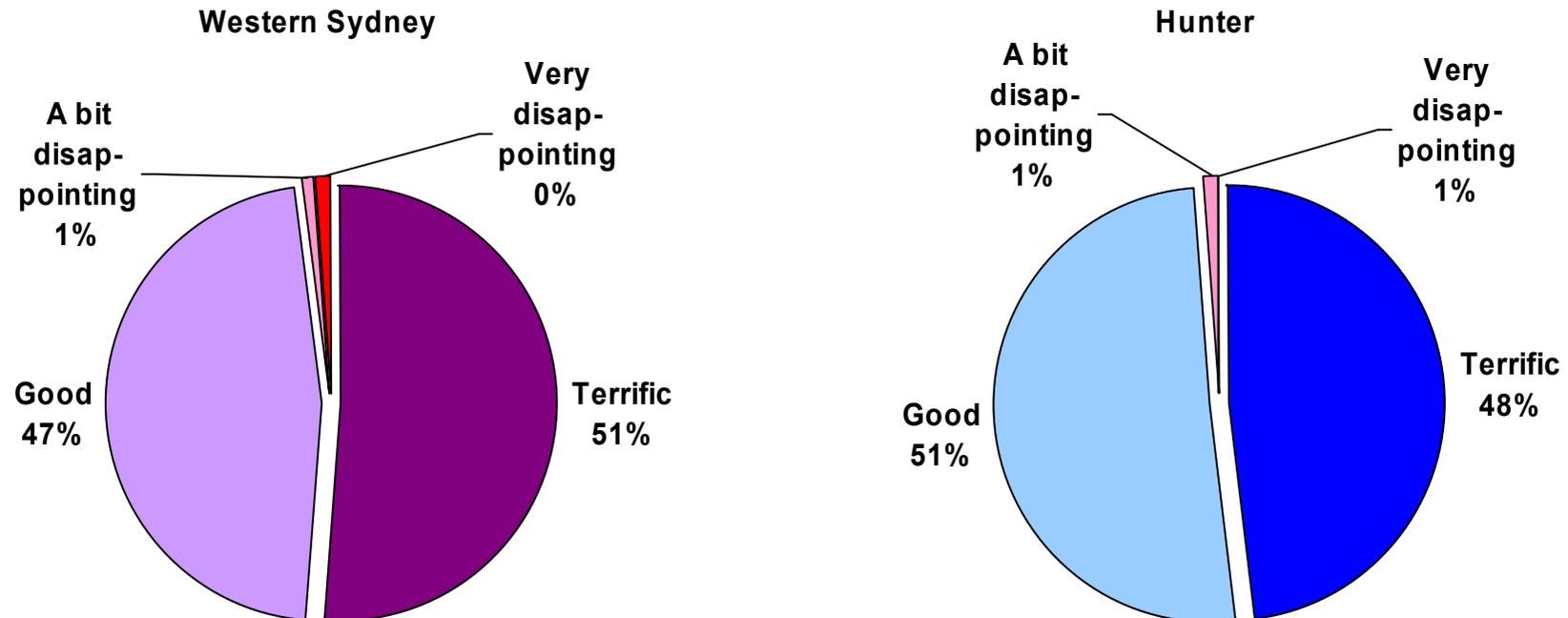
Base: All valid responses; N=1069, W.Sydney;
N=998, Hunter

Satisfaction & Feedback



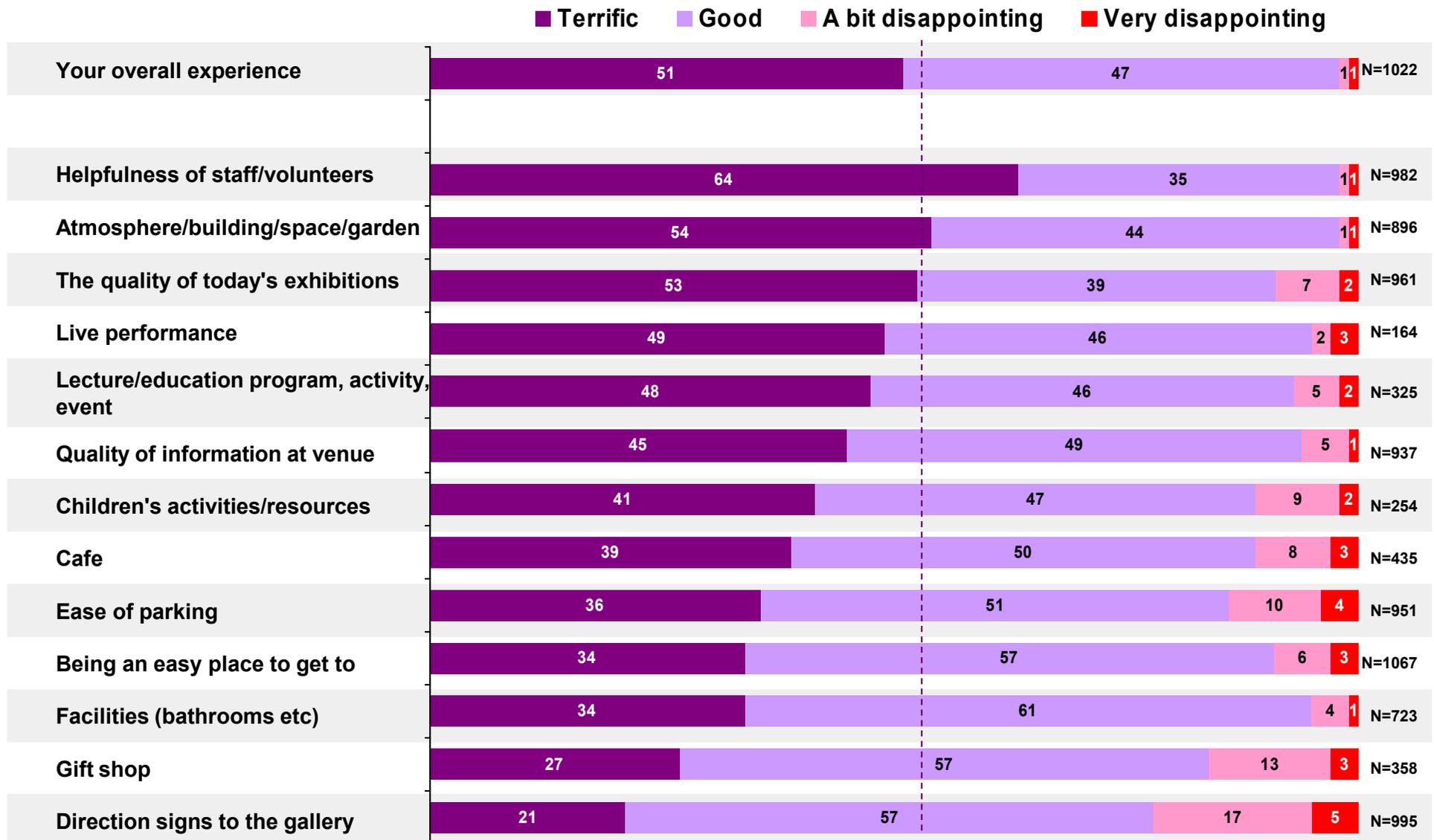
Western Front exhibition. Photo courtesy of Hawkesbury Regional Gallery.

Visitor Satisfaction



- Overall satisfaction for both regions is excellent, with 98% of visitors expressing satisfaction with the galleries.
- Around 1 in 2 visitors in both regions rated their visit as “terrific”. The challenge for galleries is to convert a rating of “good”, to a rating of “terrific”.
- The highest satisfaction score for an individual gallery was a 68% “terrific rating”, and the lowest was a 39% “terrific” rating. The highest combined “disappointing” rating was only 3%, while 2 galleries scored 0% disappointment.

Satisfaction Ratings - Western Sydney



Q.9. How would you rate ALL of the following in your visit today?

Base: All valid responses (note: not all aspects relevant for each centre) 9192

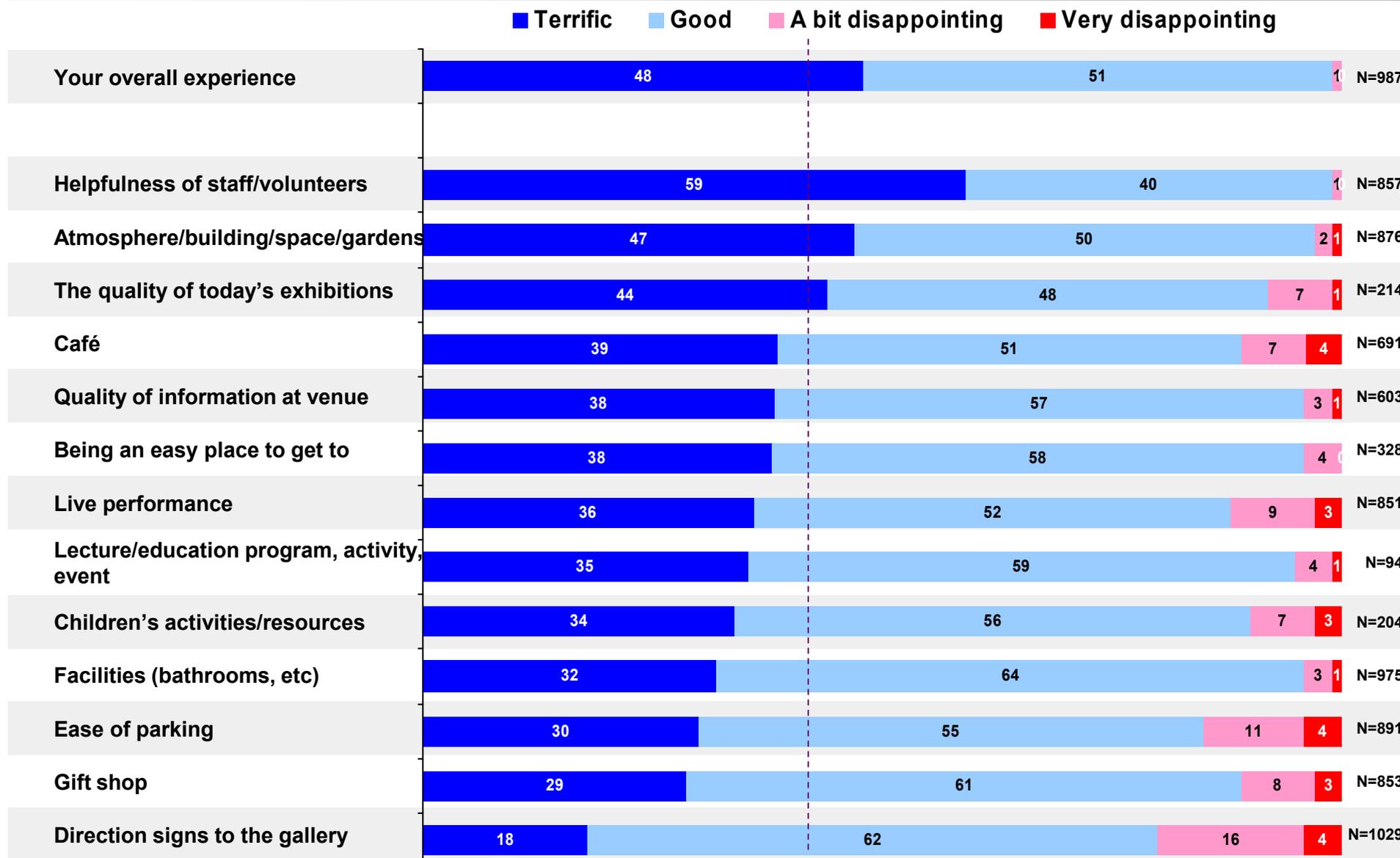
Most satisfying aspects – Western Sydney

- 2 in 3 visitors in Western Sydney rated the helpfulness of staff and volunteers as “terrific”.
- 1 in 2 thought the atmosphere/building/space/garden and the quality and enjoyment of today’s exhibitions were “terrific”.

Least satisfying aspects - Western Sydney

- 1 in 5 visitors in Western Sydney rated the direction signs to the gallery as “disappointing”.
- 16% thought the gift shop was disappointing, and 14% were disappointed with the ease of parking.

Satisfaction Ratings - Hunter



Q.9. How would you rate ALL of the following in your visit today?

Base: All valid responses (note: not all aspects relevant for each centre) 94

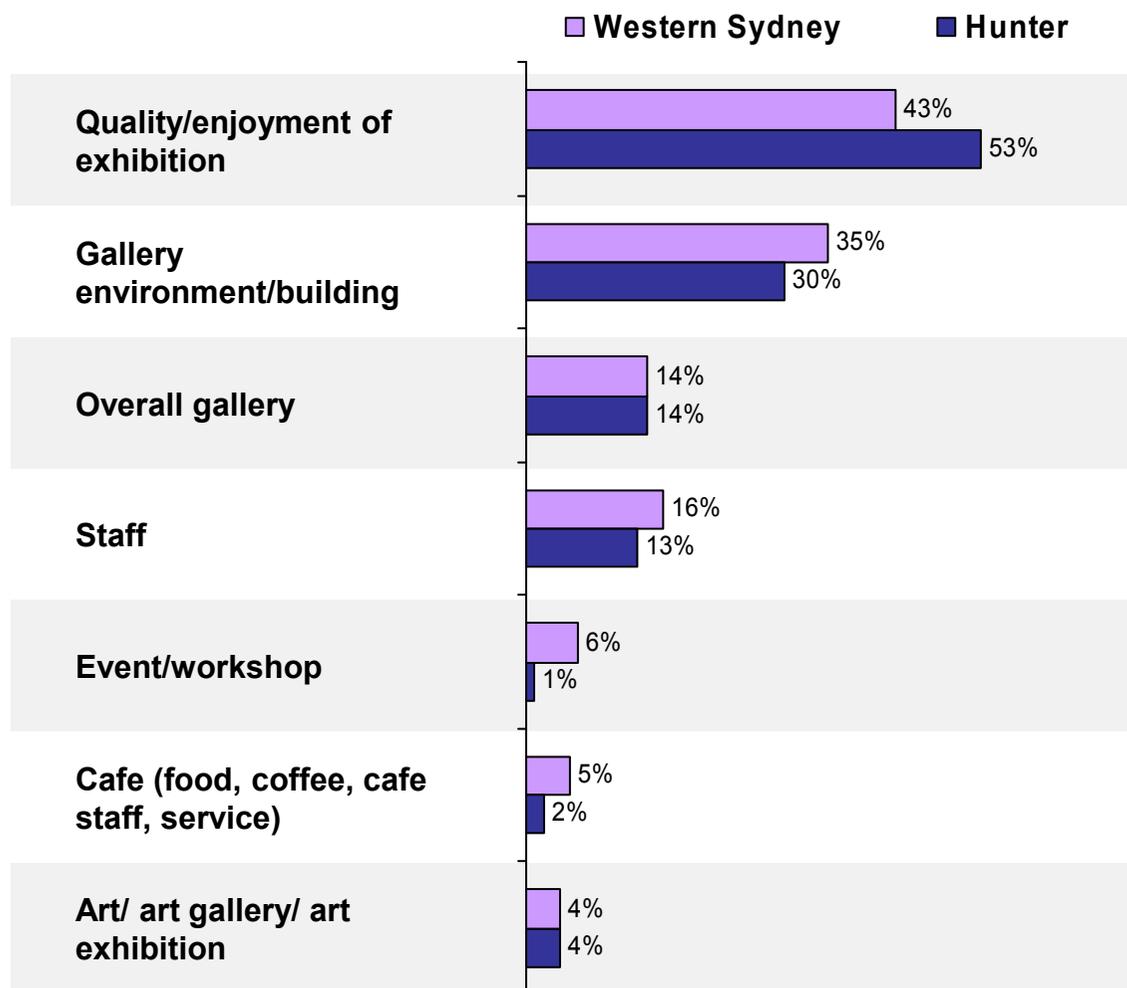
Most satisfying aspects - Hunter

- The standout area of satisfaction for the Hunter was the helpfulness of staff and volunteers, which 59% of visitors rated as “terrific”.
- Atmosphere/building/space/garden and the quality and enjoyment of today’s exhibitions were also top areas of satisfaction, with 47% and 44% respectively, rating them as “terrific”.

Least satisfying aspects - Hunter

- The standout areas of dissatisfaction with Hunter galleries were direction signs to the gallery and ease of parking.
- 1 in 5 visitors expressed disappointment with direction signs to the museum/gallery.
- 15% expressed dissatisfaction with the ease of parking.

Highlights of Their Visit



- This fully open-ended question allowed visitors to express the highlights of their visit in their own words.
- When grouping these results, the top highlight from both regions was the quality/enjoyment of the exhibition.
- 1 in 3 visitors from both regions cited the gallery environment/building as a highlight of their visit.

Feedback: Highlights of Their Visit

I always enjoy the feeling of detachment from the outside world when in the gardens

I love the grounds and atmosphere

It's a community based event where people who would otherwise not meet have the opportunity to do so...

Excellent gardens and food and service at the cafe!

I absolutely love this place - it is so professional and inspiring!

It's a really welcoming place with an artistic atmosphere

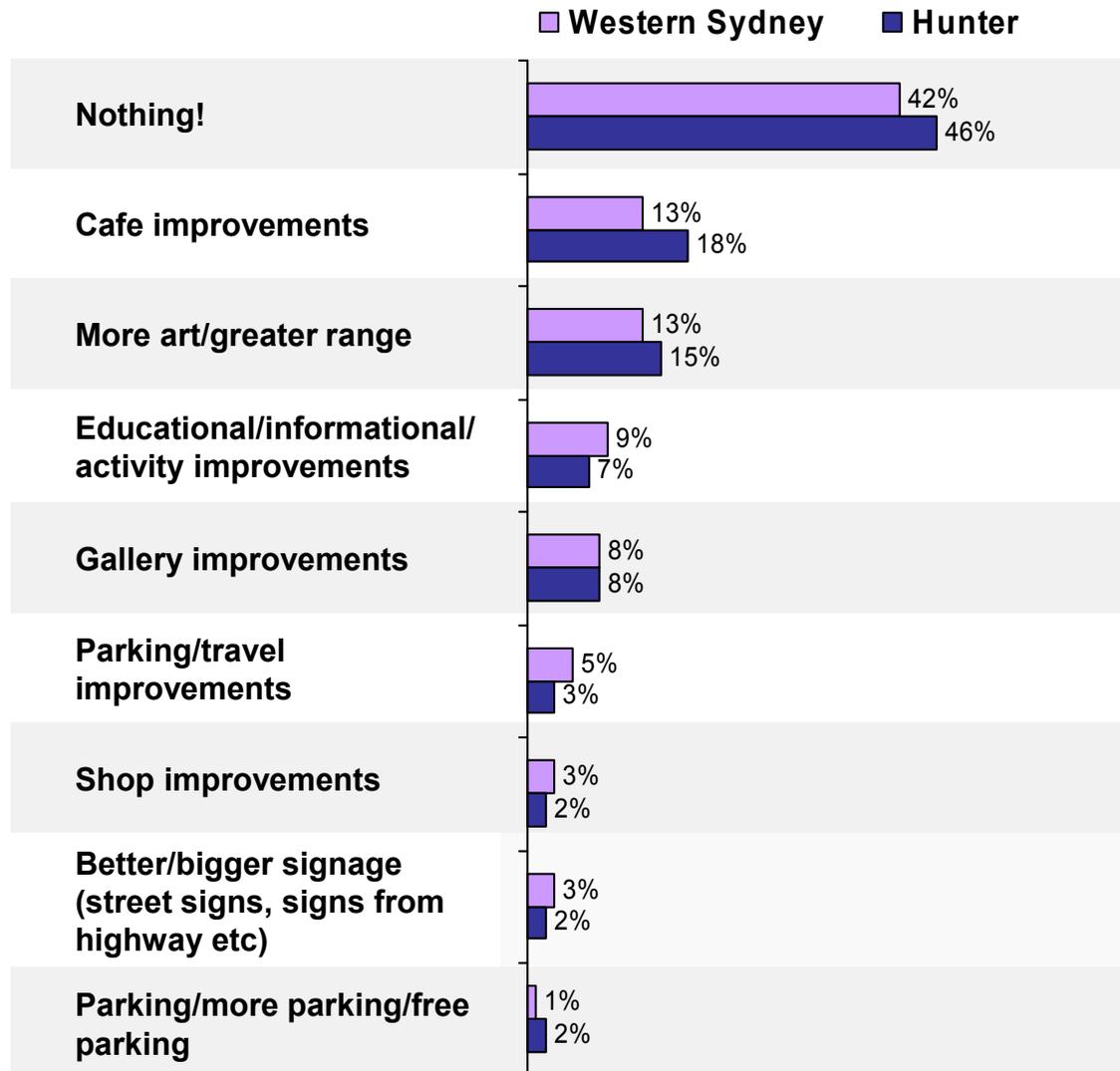
The community feeling and friendliness of staff and volunteers

Very talented people - inspired to go home and have a go

Children's art program - kids really enjoyed it

Q.10. Is there anything you particularly liked about your visit today?

Suggestions for Improvement



- Again, an open-ended question...
- Over 40% of those who responded to this question took the time to say there was “nothing” that could be improved at the museum or gallery.
- Those who did suggest improvements focused mostly on better café facilities and having more art/ a greater range of art.

Feedback: Improvements

...to be able to stop and have a cuppa and talk about our experience before facing the outside world.

It's important that courses start and finish on time with hectic schedules...

It would enhance the experience if each artist had a brief explanation of their work...

A cafe would have been great...

More parking spaces nearer to the exhibit but apart from that nothing

Elderly people want higher seating in order to rest and look at the exhibition...

More artworks

If there was a great gift shop I would like to buy presents at the gallery for my friends & family

Q.11 Is there anything that would have made your visit more enjoyable?

Conclusions & Recommendations



Photo courtesy of Lake Macquarie City Art Gallery.

Conclusions & Recommendations

Galleries and museums serve multiple functions for a diverse community...

- Galleries and museums in these 2 regions offer an accessible form of cultural activity and entertainment for groups with lower incomes, and those not in full-time employment, including retirees. Older respondents were more likely to have visited more than 5 times.
- Workshops, events and activities at these galleries are fairly popular, with one third of all visitors having participated before. Overall, these activities are more likely to be attended by those with lower incomes, and by retirees, part-time workers and those undertaking home duties. However, particular types of activities have more popularity amongst different groups.
- Whilst the main reason for attending these galleries is to see a special exhibition or the gallery collection, around one third said a key reason for visiting was to attend with their family, so it is clear that socialising is an important aspect of the regional gallery visit.

Conclusions & Recommendations

A core group of enthusiasts are repeat visitors...

- First-time visitors represent over one quarter of visitors in the Hunter and over one third of visitors in Western Sydney. When visitors return, they are most likely to return many times, rather than only once or twice.
- 44% in the Hunter and 30% in Western Sydney had visited that museum or gallery over 5 times before, demonstrating a strong sense of loyalty, once a visitor relationship is established.
- Participation in events also increases substantially for repeat visitors. Almost two-thirds of those who had visited the gallery more than 5 times, had attended an event or workshop there, compared with one third of those who had visited 1-5 times.
- Frequent attendees are also much more likely to visit alone, than those who have attended less frequently, suggesting that the gallery may become a safe and known space, as well as an artistically stimulating space.

Conclusions & Recommendations

Opportunity to develop the male audience...

- Women comprised at least two thirds of audiences across both regions, with gender proportions similar across all age groups. Only two galleries from each region had male audience representation of 40% or more. It would be useful to examine these 2 galleries as case studies, to understand why male attendance is higher.
- Men are most likely to visit with their partner, and significantly more likely than women to visit with a partner. However, in Western Sydney, almost the same proportion visited alone.
- Men spend markedly less time in the galleries than women, with over 1 in 4 spending less than 30 minutes in the gallery.
- Men were more inclined to give a rating of “good”, rather than “terrific” on all individual aspects of their gallery experience, and were much less likely than women to give a rating of “terrific” on the following: atmosphere, quality of exhibitions, helpfulness of staff, quality of information, and their overall experience.
- Qualitative research (such as focus groups) and a non-attendees visitor study could help to reveal reasons for men’s lower attendance, and determine achievable targets and methods for increasing attendance amongst men.

Conclusions & Recommendations

Opportunity to connect with a younger audience...

- Older age groups were over-represented across both regions. Younger independent visitors are under-represented across both regions, but particularly in Western Sydney, where the proportion of younger people is higher than the Hunter.*
- Only one gallery in each region achieved a substantially higher number of younger (under 35s) visitors. At one of these galleries, one third of visitors were under the age of 35, and at the other gallery, one half were under the age of 35. Interestingly, these two galleries were also the two with the highest male attendance, with spikes in male attendance in the younger segments.

* It should be noted that many galleries across both regions have active schools programs in place, and the study did not collect numbers of school-aged children visiting with school groups.

Conclusions & Recommendations

Indigenous people are well-represented as visitors to galleries and museums...

- In these two regions, particularly in Western Sydney, this appears to reflect a very conscious policy of a number of galleries to show a variety of Indigenous artworks (some local, some non-local), to involve Indigenous artists with the gallery, in some cases providing workshops and exchange programs, being a point of sale for Indigenous artwork and working with the local Indigenous community.
- People from non-English speaking backgrounds make a fair segment of Western Sydney visitors, with around 1 in 5 visitors speaking a language other than English at home. This proportion is lower than the ABS regional population proportion (over 1 in 3 are NESB), however, due to the questionnaire only being available in English, the proportion of NESB visitors may be higher than 1 in 5.

Conclusions & Recommendations

Opportunity for more growth in cultural tourism...

- Around 1 in 10 respondents from Western Sydney were visitors to the region, while almost 1 in 5 respondents in the Hunter were visitors to the region (staying at least one night in the area).
- Interstate and international tourists made up only around 6% of gallery visitors.
- In the Hunter, the majority of overnight visitors were from within NSW.
- While some galleries and museums had well established relationships with tourist organisations, others did not. Better structured relationships are recommended on a macro level, with local, regional and statewide tourism. There appears to be a great deal of room for improvement in creating cultural tourism pathways for interstate, international and intra-state visitors, to attend regional galleries and museums.

Conclusions & Recommendations

Opportunity to leverage the Internet as a marketing tool, particularly for younger visitors...

- A very small proportion of visitors learned about the gallery or exhibition they attended through the Internet (7% in Western Sydney, 4% in the Hunter).
- Over 85% report using the Internet, however older visitors and visitors with lower incomes report lower rates of Internet usage.
- In the under-35 age bracket, Internet usage is reported at 97% in Western Sydney, and 94% in the Hunter. Under 35s in both regions have the highest rates of email usage and use of the Internet to find out about things to do.
- 35-44s have the highest rates of Internet usage to plan trips or holidays and to search for family activities.
- In relation to Internet marketing, galleries should be cautious in allocating additional resources to target older and lower income brackets (those least likely to use the Internet), however, a significant opportunity may exist to target younger audiences through the Internet. Galleries may wish to explore targeting different audience segments through different types of marketing and publicity, for example, offering visitors the option to receive materials by post or via email, or receive information about specific types of activities (e.g. family activities).
- Given that over 75% of under-35s report using the Internet to find out about things to do, galleries may wish to increase their web presence to explore attracting younger audiences.

Conclusions & Recommendations

The social experience is a very important feature for many visitors...

- The most common suggestion for improving the gallery/museum was better café facilities. Some of the museums and galleries in the study have well-established cafés, others provide free DIY tea and coffee, and others have no café or refreshment facilities. In verbatim comments, people often linked wanting a café to a social experience, for example, wanting “to be able to stop and have a cuppa and talk about our experience before facing the outside world.”
- More than 1 in 10 visitors said that a main reason for attending the gallery was to visit the café, while 1 in 10 said the gardens were a main reason for their visit:
 - For example, at one gallery with a café, 47% of respondents said the café was a main reason for their visit.
 - At one gallery with gardens, 40% said the gardens were a key reason for their visit.
- So it appears that good café facilities may attract more visitors. Café and/or outdoor facilities (like gardens or playgrounds) may also attract visitors who might not otherwise have attended at all.
- In the Hunter, almost 1 in 10 respondents included a visit to the gift shop amongst the main reasons for their visit. In 2 Hunter galleries with well-established gift shops, over 1 in 6 included the gift shop amongst their key reasons for visiting.

M&G NSW

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Photo courtesy of Hawkesbury Regional Gallery.