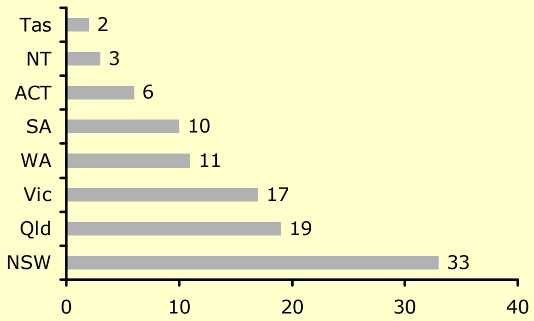
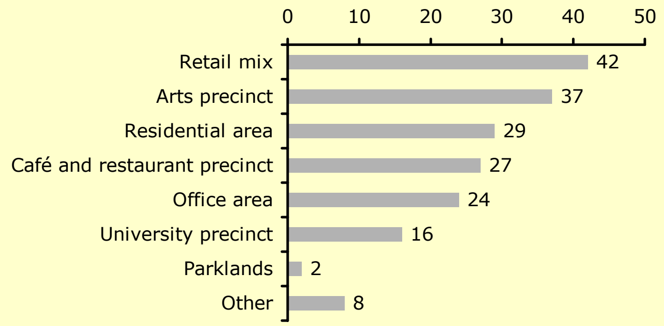
About the galleries

Chart 2.1: Gallery location by state



Base: all participants (n = 101)

Chart 2.2: Gallery neighbourhood



Participants were asked to describe immediate gallery neighbourhood by ticking all applicable descriptions.

Chart 2.3: Attendances analysed by gallery profile

Total attendances in the 2000/2001 financial year and comparing galleries specialising in contemporary Australian art, in the highest and lowest income categories and with a permanent collection.

Attendances	Total	Contemporary Australian		Annual income		Permanent collection
		Mixed program*	**100% Australian**	**Less than $200,000**	**More than $450,000**	
	%	%	%	%	%	%
Under 10,000 visitors	23	12	37	44	6	20
10-25,000 visitors	30	31	30	41	23	29
25,000+ visitors	31	50	15	7	54	40
No answer / don't know	17	8	19	7	17	11
Base: all participants (n = 101)	*n=101*	*n=26*	*n=27*	*n=27*	*n=35*	*n=45*

** Program contains less than 75% contemporary Australian work.*

Chart 2.4: Attendances for top-ranking exhibitions

No. of visitors to two best-attended exhibitions.	**1st ranking exhibition**	**2nd ranking exhibition**
Not restricted to contemporary Australian art	%	%
<1000	14	23
1001-2000	19	19
2001-4000	24	16
4001-10,000	15	14
10,000+	13	11
No answer / don't know	16	18

Base: all participants (n = 101)

About the galleries

Galleries surveyed

A gallery survey was conducted nationally by a self-completion questionnaire, with 101 galleries responding. All are subsidised by government grants or funded by educational institutions, except for four galleries specialising in Indigenous art. All responses detailed here relate to the 2000 / 2001 financial year.

Although commercial galleries were approached, their responses have not been included in this research analysis. The research brief and stages, questionnaire design, and the initial gallery database and response rate are detailed in *Data collection and research design.*

All the galleries are significantly involved in the exhibition of contemporary Australian art as defined in this research (see ***Glossary***) and include:

Gallery type	Number
Contemporary art spaces	10
Craft organisations and galleries	7
Artist-run spaces	9
National, state and regional galleries	38
University galleries	13
Festivals, biennales, recurrent events	7
Indigenous organisations and galleries	7
Mixed venues	10
Other	0

More than two thirds came from New South Wales, Victoria and Queensland, and are equally split between capital city and regional locations (Chart 2.1). Most city-based galleries are located in the CBD or inner city (70%).

The average life span of the galleries is 12.1 years. Most (66%) have operated for 11 or more years and some (15%) for five or less years. Galleries with lower incomes or smaller annual attendances are younger, and 44% (slightly more in Queensland) were established in the last 10 years.

Gallery attendances

Most galleries claimed attendances in excess of 10,000 visitors in the 2000/2001 financial year (61%). For the others attendances were smaller (23%), and 17% did not know. Higher income galleries (77%), those with a permanent collection (69%) or a mixed program (81%) were better attended (Chart 2.3).

Galleries focusing on contemporary Australian art had lower attendances (67% with less than 25,000 visitors per year), as did galleries in the lower income bracket (85% with less than 25,000 visitors). Nearly half (41%) the galleries with a contemporary Australian art focus are in the lowest income bracket. Not surprisingly, there seems to be a correlation between a gallery's income and its ability to attract visitors.

Top-ranking exhibitions

The two highest-attended exhibitions often featured prizes or awards, photography, Indigenous work, a big name artist as part of the title, an international component, an association with a major festival, or involved students or young people. Most galleries (71%) said they measure attendances by admission sales or a head count as people enter the gallery.

They were asked to list the five exhibitions (with attendances for each) that had attracted the highest number of visitors in the gallery's history. For about half, the five best-attended exhibitions ran for a month or less.

Highest single exhibition attendances (1st ranking) averaged 1000-4000 visitors (for 43% of galleries) and more than 4000 visitors (for 28% of galleries) (Chart 2.4). Detailed data not shown here reveals 67% of galleries focused on contemporary Australian work (and 33% with a mixed program) attracted less than 2000 visitors to their best-attended exhibition.

Chart 2.5: Annual income distribution of galleries

Note: 19% did not provide income information.	**Total galleries** %	**100% Australian*** %
Under $200,000	33	50
$200,000 - $449,000	24	27
$450,000+	43	23
Base: all participants answering, corrected for non response	*n=82*	*n=22*

** Galleries presenting 100% contemporary Australian art.*

Chart 2.6: Government funding for the galleries in the survey

Proportion of each gallery's total budget obtained from specified government revenue sources.	**Federal** %	**State / Territory** %	**Local** %	**Other government*** %
Total	54	57	44	17
Average of total income	13	18	23	5

Base: Corrected for non-response

***Other government revenue sources relate to employment programs, government health organisations, international governments, state education departments, lottery commissions, and special project grants.*

Chart 2.7: Non-grant income

Proportion of each gallery's total budget obtained from the following earned revenue sources.	**Proportion of galleries** %	**Proportion of budget** %
Retail / art sales	60	11.6
Sponsorship	66	11.5
Admission / fees / ticket sales*	37	3.7
Membership	42	3.1
Hire or rental of gallery spaces	16	16
Services, consultancies, workshops	12	11
Artists' fees and commissions	7	20
Donations or fundraising	6	5
Other (includes bequests, foundations and festivals)	53	19.8

Base: all participants (n = 101)

** Admission sales refer to workshop or lecture admissions as well as exhibition admissions.*

Chart 2.8: Average number of paid and volunteer staff

Full-time, part-time and volunteer staff levels by attendance and income.	**Full-time**	**Part-time**	**Volunteers**
Total average number of staff	11.4	4	25.7
By attendance level:			
<10,000 visitors	1.3	1.5	9.7
25,000+ visitors	30.4	7.4	52.3
By income level:			
<$200,000 per annum	1.1	2	11.9
$450,000+ per annum	22.1	5.4	38.4

Base: all participants (n = 101)

Gallery incomes

Note: Income findings reflect the 101 galleries surveyed and not the whole sector.

The most common sources of income are funding from various levels of government, retail and art sales, and sponsorship. Most galleries (57%) have an annual income of less than $450,000 a year (Chart 2.5). Slightly more capital city galleries are likely to be in the highest income category (49%).

Galleries presenting only or mostly contemporary Australian art are more likely to have annual incomes of less than $200,000. Lowest income galleries include 40% of those located outside the CBD or inner city and 37% of non-capital city galleries.

Income sources

Galleries exhibiting contemporary Australian art earn a higher ratio of revenue from retail and art sales. More than half the galleries (57%) do not raise income from admission charges, membership or local government.

Government funding for galleries in the survey

Government funding is critical (Chart 2.6). Galleries responding to this survey that did not receive any federal government funding include 64% located outside the CBD or inner city, compared to 40% in the CBD or inner city. Conversely, 76% of capital city galleries did not receive any local government funding.

Galleries showing contemporary Australian art are less likely to receive grants except federal grants. These federal grants are at a similar level to the grants received by all galleries in the survey.

Admission charges

Most galleries (89%) do not charge admission (Chart 2.7). Most do not charge for special exhibitions (80%), although some galleries with a higher income or mixed programs (33%) do charge for special exhibitions.

Seven galleries responded on admission fees, quoting $3–$10 for adults ($2–$8 concession), and $3–$12 for adults ($2–$10 concession) for special exhibitions, usually with special rates for families and school groups. One gallery charges only for opening nights ($3).

Marketing budgets

On average, galleries spend around one fifth of their annual budget on marketing (more for smaller galleries, less (8%) for higher income galleries).

Around half this allocation (45%) is spent on promoting the annual exhibition program. Six per cent is allocated to promoting education programs and only 2.5% on medium to long-term audience development strategies. However,

- a quarter do not budget for promoting the gallery as a whole
- half do not budget for promoting education programs
- two-thirds do not budget for medium to long-term audience development.

Marketing is primarily used as a short-term promotional tool to attract audiences to single exhibitions. While this is important, resources need to be earmarked for medium or long-term planning and development.

Gallery staffing

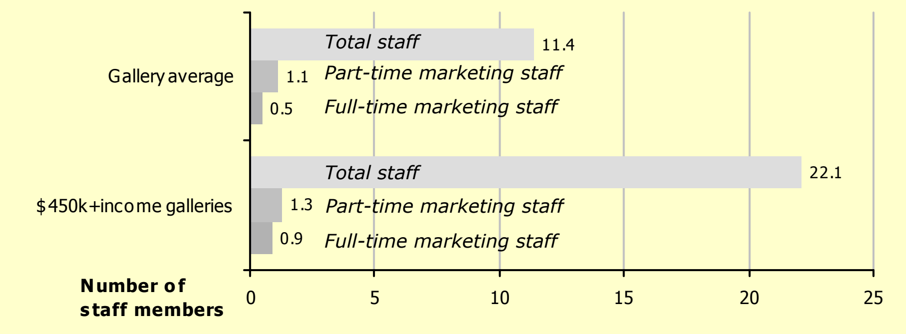
There is considerable variation in staffing levels. Most galleries operate with three full-time staff or less (67%), many with one full-time or less (37%), and 19% have no full-time staff at all (Chart 2.8).

Most lower income galleries operate with one full-time staff or less (78% compared to 37% for all galleries), and one part-time staff or less (56% compared to 39% for all galleries).

The ratio between full and part-time staff is more equal in lower attendance and lower income galleries, and those exhibiting contemporary Australian work.

On average, there are 2.2 volunteers for each full-time person; this ratio increases to 11.9 volunteers for lower income galleries. Galleries not located in the CBD or inner city use more volunteers.

Chart 2.9: Marketing staff as a proportion of total staff



Base: all participants (n = 101)

Chart 2.10: Number of exhibiting spaces

Exhibiting spaces	Total galleries %	Income <$200k pa %	Attendance <10,000 pa %
None	12	7	13
One or two	41	59	70
Three or four	32	26	13
More than five	15	8	4

Base: all participants (n = 101)

Chart 2.11: Opening hours

Incidence of closed days, percentage opening after 6pm or before 12 noon and average number of hours open.

	Weekends		Weekdays				
Opening hours	**SAT**	**SUN**	**MON**	**TUE**	**WED**	**THU**	**FRI**
	%	%	%	%	%	%	%
Closed	6	35	53	14	nil	nil	2
Open after 6pm	2	2	4	4	3	3	5
Open before noon	69	42	44	81	88	88	86
	Hours	**Hours**	**Hours**	**Hours**	**Hours**	**Hours**	**Hours**
Hours open (average)	5.7	5.7	7.4	6.9	6.6	6.6	6.8
Base: corrected for non-response	*n = 95*	*n = 95*	*n = 96*	*n = 95*	*n = 95*	*n = 95*	*n = 95*

Marketing staff

Galleries average 1.6 marketing related staff (comprising 0.5 full-time staff and 1.1 marketing and publicity full-time equivalents), compared to 11.4 full time staff. Most do not have anyone dedicated full-time to marketing (Chart 2.9).

Even galleries with incomes exceeding $450,000 a year average only a 0.9 full-time marketing specialist (compared to 22.1 full-time staff overall), although this increases to 2.2 when part-time staff is taken into account. Galleries with less than 75% contemporary Australian work, those with higher incomes and higher attendances have more marketing staff.

Despite the shortage of internal marketing staff, only 39% have a board member with marketing expertise, and 67% rarely, if ever, contract external specialists.

Exhibition and venue facilities

On average, galleries have three exhibiting spaces. This trend is slightly less marked for galleries in the lowest income bracket (Chart 2.10). Galleries with fewer spaces have the lowest attendances.

Some galleries have lecture theatres and screening auditoriums (21%) with an average capacity of 181 seats. Many galleries *do not* have education spaces (71%), lecture or screening rooms (79%), meeting rooms (47%), multi-purpose spaces (69%), workshops (64%), artist studios (78%) or toilets in their building (23%). Most galleries (91%) *do not* have conservation facilities on their premises.

Galleries frequently mention lack of storage; most do not have non-public storage (73%), but many (41%) have publicly accessible art storage areas. Galleries are more likely to have a shop (44%) than a cafe, restaurant or bar (27%).

Venue suitability and maintenance

Most galleries say the venue suits its current use (68%) from the perspective of location, refurbishment, spaciousness and access. Dissatisfied galleries cite lack of storage (44%), limited exhibition space, need of refurbishment, and location, parking and security problems.

Most galleries are satisfied with how the public areas and facilities are maintained (90%), but one in five said their building is in need of a general upgrade and facelift, or that their entrance foyer needs improving. Fifty-five per cent of galleries (63% presenting only contemporary Australian work) are themselves responsible for their building's maintenance.

Other desirable venue improvements include better lighting and climate control, signage, disabled access, building extensions, a retail space, café, lounge or rest area, seating, toilets, cloak checks and artist studios. Desirable external improvements include gardens, parking, lighting, outdoor sculpture areas, rest areas or cafés, covered walkways, and general repairs.

Disability access

A high proportion of galleries (75%) provide 'disabled' access at the building's entrance (slightly fewer throughout the building).

Signage

Galleries frequently mention the need to improve external (46%) and internal (17%) signage. Many do not have the gallery's name prominently displayed on the building's exterior (31%), and some need better signage for navigating the interior spaces (29%). Galleries maintained by a government agency (29%) have a greater desire to improve both internal and external signage.

Opening hours

Galleries are open fewer hours a day at weekends (35% are closed on Sundays) than they are during the week (53% close on Mondays) (Chart 2.11). Higher income galleries open for more extended hours during the weekend.

Only 6% of galleries are open after 6pm on a weekday but 84% claim to extend their opening hours at times of high demand. Fewer galleries (40%) close for major public holidays, with Christmas Day and Good Friday the most frequent days of closing.

Chart 2.12: Core programs and artform focus

Activity	%
Present exhibitions	96
Collect work	26
Sell works of art	24
Content	%
Contemporary visual art	92
Contemporary craft	64
Includes non-contemporary	32

Base: all participants (n = 101)

Chart 2.13: Predominantly Australian exhibitions originated by galleries

Exhibitions *originated* in previous 12 months	**Visual art**	**Indigenous**	**Craft**	**New media**
	%	%	%	%
None	25	59	61	69
1–5	29	33	33	25
6–10	18	5	5	3
11–15	11	2	1	2
16+	17	0	0	0
Average	8.2	1.3	1.2	1.0

Base: corrected for non-response

Chart 2.14: Predominantly Australian exhibitions received by galleries

Exhibitions *received* in previous 12 months	**Visual art**	**Indigenous**	**Craft**	**New media**
	%	%	%	%
None	53	75	65	87
1–5	36	25	33	13
6–10	7	0	2	0
11–15	2	0	0	0
16+	2	0	0	0
Average	2.2	0.4	0.8	0.2
Base: corrected for non-response	*n=99*	*n=98*	*n=98*	*n=98*

Chart 2.15: Capital city / non-capital city galleries and touring exhibitions

Contemporary Australian exhibitions *originated* in previous year	**Total**	**Capital city**	**Non-capital city**
	%	%	%
Visual art	75	63	86
Craft	39	26	51
Indigenous	41	39	41
New media art	31	28	31
Base: corrected for non-response	*n=100*	*n=49*	*n=51*
Exhibitions *received* in previous year	%	%	%
Visual art	47	28	64
Craft	35	24	45
Indigenous	25	18	29
New media art	13	10	16
Base: corrected for non-response	*n=99*	*n=49*	*n=50*

Core programs

What is contemporary art?

challenging, difficult, stimulating, frustrating, demanding, perplexing, courageous, improvisational, inventive, competitive, sanctimonious, hierarchical

This is a snapshot of emotive and ironic responses from industry professionals when asked to define 'contemporary' in relation to visual art and craft.

But how would they describe 'contemporary art' to the general public? Although key terms usually included one or more of the following factors, most defined 'contemporary art' only in terms of its historical time span.

time span—work by living artists, or recent work in the past 10 to 100 years.

process—comments ranged from prodding new ways of seeing, fresh approaches, originality and experimentation to the non-traditional, challenging arts practice, thought-provoking and pushing the boundaries of form.

content—engagement with current issues, places or ideas.

Some galleries placed emphasis on the *'artist's practice*', others on the '*viewer's experience*'. A few galleries considered '*quality'* issues (object-making skills, working artists exhibiting regularly) when defining contemporary art.

There was debate about the need to differentiate craft from visual art, although most thought the term 'visual art' comfortably embraces craft. Some galleries substitute 'craft' with generic descriptions such as 'objects' and 'three-dimensional forms'.

Core programs and artform focus

On average, galleries dedicate 78% of their program to predominantly contemporary Australian art (Chart 2.12). In verbatim descriptions of their core programs, 14% of galleries refer to Indigenous work, 6% to community work and 4% to the work of emerging artists. Only one gallery mentioned multicultural programs, although some refer to cross-cultural work.

Collections

Forty-five per cent of galleries have a permanent collection and display of contemporary art (30% in capital cities and 59% in regional areas). Most collect Australian work, with a significant number of galleries also collecting work of international significance.

Many collections have particular relevance to the region, either in content or artists targeted. Only two galleries specifically collect the work of emerging artists. Collection policies more often include reference to the work of established artists than do exhibition policies.

Contemporary Australian exhibitions

For 82% of galleries, contemporary Australian art comprises more than half their exhibition program, and more than 90% for around half the galleries.

Twenty-seven per cent present only Australian work—an emphasis less marked for higher income galleries.

Touring exhibitions

Galleries frequently originate or receive touring exhibitions of predominantly contemporary Australian art (Charts 2.13 and 2.14). They include:

- visual art (75% originated, 47% received)
- craft (39% originated, 35% received)
- new media (31% originated, 13% received)
- Indigenous art or craft (41% originated, 25% received).

Fifty-nine per cent of galleries (notably those with 25,000+ attendances, higher incomes or a capital city location) had toured their exhibitions to other galleries in the previous 12 months. Regional galleries are more active in originating or receiving predominantly contemporary Australian exhibitions, particularly in the area of craft (Chart 2.15).

Chart 2.16: Interpreting exhibitions

Interpretive exhibition aids selected from the following list	Always %	Often %	Sometimes %	Never %	No answer %
Wall mounted displays	47	35	14		5
Information sheets	46	32	13	1	9
Catalogue for purchase	16	43	31	4	7
Guided tours	17	27	32	9	16
Lecture or seminar program	10	27	39	8	17
Computer or Web-based tools	15	10	40	16	20
Video or film	3	14	47	12	25
Audio guides	1	4	11	58	26
Other	9	9	5	2	75

Base: all participants (n = 101)

Chart 2.17: Public programs related to exhibitions

Frequency of activities in previous 2 years	Always %	Often %	Sometimes %	Never %	No answer %
Exhibition openings	71	19	5	1	4
Seminars, lectures, forums for general public	17	36	35	8	5
Seminars, lectures, forums for members	7	20	34	26	14
Private views (not associated with the gallery)	5	23	51	8	13
Private views (sponsors / members)	3	11	44	25	18

Base: all participants (n = 101)

Chart 2.18: Exhibition openings, seminars and forums

Total galleries surveyed compared to highest attended galleries in 2000/2001.

Activities	Total %	25,000+ visitors p.a. %
Openings—always or often	90	84
Seminars, lectures, general public forums—always or often	53	65
Base: all participants (n = 101)	*n=101*	*n=31*

Chart 2.19: Gallery statements about public programs

Attitude statements	Agree %	Neither/nor %	Disagree %	No answer %
Our public program is fairly evenly spread across all age groups	65	17	15	4
We would do more public programming if we had people with the right skills	54	22	19	5
Many curators assume visitors are already familiar with contemporary art / craft	46	23	28	4
It is difficult to find engaging and interesting speakers or writers on contemporary art / craft	35	13	51	2
Good contemporary art speaks for itself and should not need further explanations	15	14	66	5
Our public programs focus mainly on the teens and pre-teens age groups	8	13	76	3

Base: all participants (n = 101)

Chart 2.20: Gallery statements about audience services

Attitude statements	Agree %	Neither/nor %	Disagree %	No answer %
We are constantly reviewing what other galleries are doing so that we can improve our audience services	59	23	13	5
Our organisation or gallery is primarily driven by creating customer satisfaction	48	25	23	5
Audience development and audience services sidetrack us from our main purpose	6	19	72	4

Base: all participants (n = 101)

Audience-related services

Interpreting exhibitions

Wall mounted displays, information sheets and catalogues are the most frequently provided interpretive aids for the visitor (Chart 2.16).

More than a third of the galleries appear not to use computer or Web-based tools, video or film as interpretive aids, and only 16% use audio guides. Capital and inner city galleries, and those with higher incomes are more likely to provide computer or Web-based technology as interpretive aids.

More than 80% do not have access programs for the visually or hearing impaired.

Public programming

Opening events and seminar or lecture programs are the most commonly provided public programs (Chart 2.17). Galleries with higher attendances are more likely to provide guided tours, lecture and seminar programs (Chart 2.18).

Galleries find it hard to reach new audiences owing to:

- lack of people with the right skills within the organisation
- an assumption by curators that audiences are familiar with contemporary work
- difficulty in finding people who can write or talk about the art in an engaging way.

Most galleries surveyed do not expect that 'good contemporary art' should be able to 'speak for itself' (only 15% agreed with this statement).

Galleries believe their public programs are evenly spread across all age groups (Chart 2.19).

Internal public programs

Workshops, floor talks, lectures and guided tours are the most frequently mentioned internal public programs. Examples of internal programs provided by the galleries are detailed in Chart 2.22 on the next page.

Galleries with higher attendances, located outside capital cities or with a permanent collection are significantly more active in providing programs for target audiences or stakeholders. Conversely, galleries specialising in contemporary Australian art are less active in targeting programs to niche audiences.

Non-capital city galleries place more emphasis on programs designed for young people outside the education system.

External public programs

Some imaginative programs were detailed by galleries, including installations in outdoor areas of the CBD, exhibitions in non-traditional venues, travelling exhibitions to remote communities and schools, and in one instance, the establishment of a satellite gallery in the outer suburbs.

Less than half the galleries conduct external programs with the general public (43%), schools and young people (47%) and other target audiences (around a quarter). See Chart 2.23 on the next page for examples of external programs provided by the galleries.

Information services

Galleries are often the first port-of-call for information about the visual arts in their region. Nearly two-thirds provide information services to the general public, artists, collectors, educators, commissioning architects, designers and retailers. Many provide a telephone information and referral service, a library or reference materials, and briefings and professional development services to artists.

Other public information services include: art valuation, access to collection databases with images and commentaries, quarterly magazines or regular newsletters, community notice boards, volunteer training programs, and guest speeches to clubs and associations.

Chart 2.21: Internal public programs by gallery profile

Targeted internal public programs	Total %	Non capital city %	>25,000 visitors %	Permanent collection %	100% Australian %
General public	54	61	74	60	33
Primary schools	46	63	52	64	44
Secondary schools	60	75	68	73	59
Tertiary	59	63	65	64	48
Young people outside education	31	49	42	40	22
Artists	50	59	65	60	41
Base: all participants	*n=101*	*n=51*	*n=31*	*n=45*	*n=27*

Chart 2.22: Targeted internal programs listed by galleries

Children and youth	mural project, primary school tours, youth workshops, art day for pre-schoolers.
Artists and collectors	professional development programs, monthly seminar series, a curatorial workshop on public art, Web design workshops, artist residencies, artist and collector floor talks, a lighting workshop for self-exhibiting artists, a collectors group, a publishing program of artist monographs, young artist awards.
Education sector	exhibition installations (secondary students), art appreciation (primary students), talks (tertiary students), folio and art practice workshops, programs for visual art educators, teachers' briefings and preview workshops, guest lecturers, student placements, education kits.
General public	artist / curator floor talks, evening lecture program, product launches, visitor-created installations, multi-artform public programs, 'art at lunch' program with guest speakers, sponsor / community use of gallery space.
Indigenous	art classes and tour of exhibition with Aboriginal rehabilitation focus, painting classes, exhibition with Aboriginal football team, performances, readings, provision of free transport to gallery for school children.

Base: all who responded in written form

Chart 2.23: Targeted external programs listed by galleries

Children and youth	school talks, youth exhibitions / festivals, travelling schools' exhibition, mural project with primary schools, school holiday / summer workshops, internships for school leavers and tertiary students, artist-in-school programs, one exhibition included music targeted at youth.
Artists	regional market development, cultural exchanges, quarterly workshops for designer/makers, skills-based workshops.
Education sector	professional practice seminars, an off-site conference for academics and arts communities, lectures and forums associated with exhibitions.
General public	installation and promotional activities in CBD and retail areas, lectures to service clubs, art fairs (7000 visitors over two days), exhibitions in non-traditional venues (25,000 visitors), satellite gallery established in outer suburb, exhibition-related forums and workshops (some with artists-in-residence), displays / live performances in libraries and community arts centres, festivals and 'special' weeks.
Indigenous	cultural exchanges, first nation workshops, 'art on the move' to Aboriginal communities, lectures on Indigenous artists, bus tours to Indigenous sites at local national park.

Base: all who responded in written form

Improving the visitor experience

Galleries were asked to describe programs that had improved the visitor experience. Although some of these verbatim responses targeted multiple categories, they are listed below in only one category.

- **Artist involvement**: This is the most frequently mentioned characteristic of positive visitor experiences, including artist-led floor talks, school visits, artists travelling with touring exhibitions for public programs and media coverage, access to artists at public talks, artist residencies and workshops.
- **Content**: Galleries said that photography, work by local artists or about local places or issues, craft, textiles, thematic exhibitions, children's exhibitions, big-name artists or celebrities attract larger audiences and have a higher level of visitor enjoyment. A few galleries noted that content is the most important component in helping galleries to engage with visitors, increase attendances and attract media attention. One gallery described how an exhibition of popular local artists with provocative subject matter prompted substantially more media coverage. Exhibitions of awards and prizes are also appealing to audiences.
- **Diversity**: Several galleries mentioned the success of hybrid or cross-disciplinary exhibitions, group shows, and exhibitions with sufficient diversity to appeal to more than one niche audience.
- **Interactivity and participation**: Examples included were visitors contributing to installations, interactive exhibits, hands-on installations, celebrities creating 'exhibits' along exhibition theme, tours to local RAAF base in conjunction with an Octane exhibition, meditation sessions, performances and ceremonies (Gyuto Monks), hands-on workshops.
- **Event design**: Events described by galleries included party nights, themed nights (an animation exhibition with a movie theme included sponsored popcorn and pizzas for a student audience), popular DJs, combining the exhibition with a special event, social occasion or performance (poetry, theatre, music), kids parties, and morning tea packages for seniors. An online catalogue for a national graduate show was very effective, attracting numerous cross-promotions with other organisations. Another gallery linked a Chinese exhibition to Chinese New Year. One gallery described Neighbourhood Days with sausage sizzles, children's events and displays from schools and community groups: '*It makes people feel more comfortable about coming to the gallery*.'
- **Celebrity factor or local connections**: One gallery talked about the success of 'popular' art that relates to the everyday, and another about the QAG's touring exhibition 'Day at the Beach'. One regional gallery attracted 600 people to a lecture given by the National Gallery of Australia's Dr Brian Kennedy.
- **Education**: One gallery commented that audiences enjoy exhibitions more when they understand the ideas and concepts behind the show. So that visitors are better prepared when they arrive at the gallery, this gallery is providing more contextual information and detail in promotional material. Some galleries noted that successful school programs increase demand overall.
- **Outreach**: One gallery writes: '*Conventional marketing has little to do with the promotion of contemporary art exhibitions—we need a higher standard of education, starting from primary school. We now promote our exhibitions by taking them out to school libraries, theatre foyers, community centres ... in fact, any secure space.*' Another gallery credits its success to an extensive outreach program involving people of all ages and ranging from Art Taster workshops for adults to Playart for pre-schoolers.

Chart 2.24: Market research

Research *Frequency of market research activity*	**Frequently** %	**Occasionally** %	**Never** %	**No answer** %
Own audience evaluation of exhibitions	26	46	22	7
Visitor research	27	41	27	6
Profiling visitors on site by postcode or other data	29	23	40	9
Provision of feedback forms	19	28	46	8
Visitor feedback through exit surveys	19	18	54	9
Research of the wider marketplace	8	39	45	9
Audience evaluations of exhibitions by independent consultant	4	15	71	10

Base: all participants (n = 101)

Chart 2.25: Gallery statements on the role of frontline staff

Statements	**Agree** %	**Neither/nor** %	**Disagree** %	**No answer** %
Regular exhibition briefings with all frontline staff are a regular part of our program	59	20	13	8
Security staff in galleries can't be expected to know about the art	22	23	49	7

Base: all participants (n = 101)

Chart 2.26: Gallery statements on media and promotions

Statements	**Agree** %	**Neither/nor** %	**Disagree** %	**No answer** %
The media aren't interested in quality coverage of contemporary art and craft	47	26	24	4
We rely primarily on word of mouth to promote our exhibitions	20	16	61	4
We know who the audiences are for contemporary art & craft	34	32	31	4

Base: all participants (n = 101)

Chart 2.27: Targeted promotions

Promotion type *Frequency of promotional activities for each exhibition*	**Frequently** %	**Occasionally** %	**Never** %	**No answer** %
Print media	67	27	2	4
Direct mail to previous visitors	60	24	11	5
Electronic media	29	37	25	10
Direct mail to people who have not visited the gallery	17	42	26	16
Outdoor media advertising	15	29	39	18

Base: all participants (n = 101)

Marketing contemporary art

Around two-thirds of galleries do not rely primarily on word of mouth to sell their exhibitions, indicating the importance most galleries place on marketing programs. Marketing budgets and marketing staff breakdowns are detailed on pages 17-19.

Strategic planning

Three quarters of the galleries claim to have a strategic plan, and 84% said they address the issue of developing audiences in their strategic plan. Only a third believe they know the composition and characteristics of the contemporary art audience, underlining the value of the audience study in Chapter 3.

Galleries in capital cities, with higher incomes ($450k+) or higher attendances (25k+) are more likely to have a strategic plan. Those showing less than 75% contemporary Australian art are far less likely to have a strategic plan.

Only 15% consider their strategic plan is 'very successful', implying that it either needs maintaining as a living document, or is not considered a key business tool.

Market research

Galleries are more likely to conduct their own audience evaluations of exhibitions (72%) rather than use an external consultant (19%). Sixty-eight per cent conduct visitor research frequently or occasionally. Thirty-seven per cent conduct exit surveys and 47% provide feedback forms for visitors to complete. Around half profile their visitors by collecting postcodes or other data during the visit.

The frequency and number of galleries seeking feedback and data from their visitors needs to improve (Chart 2.24).

Public relations

Most galleries recognise that a person's visit to the gallery is coloured by the people they meet—the receptionist, information staff, security staff and gallery guides.

Around half believe security and other frontline staff should be familiar with the art, but 40% appear *not* to hold regular briefings with their staff (Chart 2.25).

Only half the galleries regularly involve marketing staff in program and event planning. Nineteen per cent rarely or never involve marketing staff, presumably because they don't have marketing expertise on staff.

Media relations

'*Media coverage is essential for building your profile in the marketplace*', says SAUCE. But nearly half the galleries (47%) believe the media are not interested in providing quality coverage of contemporary work (Chart 2.26). As SAUCE also says, 'J*ournalists want stories that will pique the interest of their readers … their first priority is building circulation … so keeping them informed of what is happening in your gallery requires creativity, attention to detail, and lots of time and patience.*'

Targeting niche audiences

Nearly half the galleries are not targeting specific demographic groups. Of those who did specify a target audience, 53% state youth and education as a priority.

The tourist market is also important to a small number of galleries (seven). Two galleries said their priority was reaching audiences outside the normal 'arts audience' demographic (lower incomes, less educated or living in the outer suburbs). Eight galleries referred to targeting culturally diverse audiences. Six galleries that generally don't specialise in Indigenous art nevertheless target Indigenous audiences. Most specialist Indigenous galleries target collectors in Australia and overseas to support their artists and the growth of their business.

It is logical that marketing activity is driven by the content of each exhibition and this may be why more galleries did not specify core audience targets.

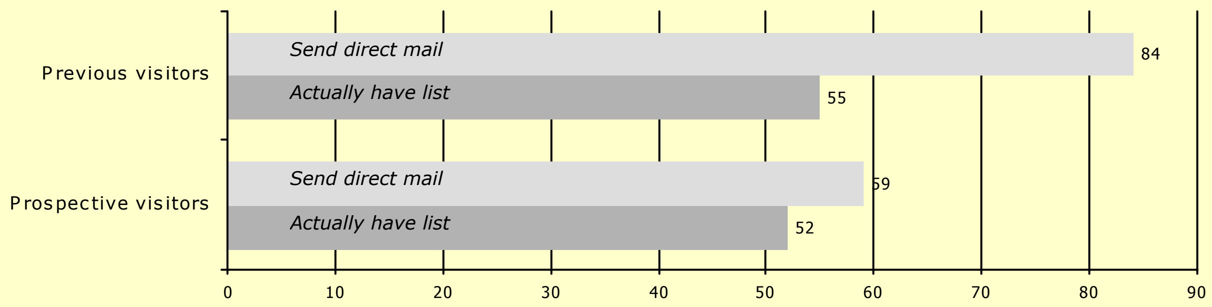
It is, nevertheless, an issue for concern that more galleries are not identifying specific targets—as either the core audience for exhibition programs or targets for long-term audience, program and business development (Chart 2.27).

Chart 2.28: Database management

Database record types	**Galleries** %
Mailing databases of galleries are more likely to contain:	
Media contacts	82
Other galleries	79
Local practising artists	76
VIPs and sponsors	75
Politicians	74
School teachers	70
Curators	68
Mailing databases of galleries are less likely to contain:	
Relevant clubs and associations	64
Practising artists not in the local area	58
Recent visitors	55
Prospects gathered from joint promotions or outreach programs	42

Base: all participants (n = 101)

Chart 2.29: Direct mail anomalies



Responses to questions about the use of direct mail indicated more galleries were using direct mail than actually had in-house mailing lists. It is possible that some galleries are using external lists.

Base: all participants (n = 101)

Chart 2.30: What gallery websites deliver

Website function *Services delivered by gallery websites.*	**Galleries** %
Educational and background information on exhibitions	47
Online ordering of goods and services	21
Email newsletter	19
Virtual gallery for viewing works of art	19
Newsgroup or forum	11

Base: all participants (n = 101)

Chart 2.31: Joint promotions

Joint promotion frequency for each exhibition	**Frequently** %	**Occasionally** %	**Never** %	**No answer** %
Other arts organisations	20	57	12	11
Tourism agencies	18	47	23	13
Non-arts organisations	7	56	21	16

Base: all participants (n = 101)

Database management

Direct mail and email

The low incidence of collecting visitor data (names, postal and email addresses) from current visitors is quite alarming. Even fewer galleries are retaining prospects gathered from outreach programs and joint promotions.

Direct mail programs can generate repeat business, attendance at lectures, forums and symposia, enrolment in a membership program, and encourage donations or bequests. It can be difficult to collect visitor data since most galleries do not charge admission fees, but an increased focus on building relationships with visitors through direct mail and email will develop loyalty and lead to return visits.

Most galleries (86%) have a mailing list that the general public can join, and most target the audience groups listed in Chart 2.28. The highlights in this chart show where galleries can improve their reach.

Only half the galleries segment their list by the person's interest in contemporary art. This is perhaps not surprising, given that 72% of galleries commit more than 75% of their program to contemporary Australian art. But galleries also presenting non-contemporary work are even less likely to segment their list by an interest in contemporary work (31%).

Galleries without a permanent collection more frequently use direct mail to previous visitors.

Anomalies

- Although 84% of galleries direct mail previous visitors, only 55% have lists of recent visitors. This implies galleries may be using old lists, over-calculating their use of direct mail to this target, or under-estimating the extent to which their lists contain recent visitors (Chart 2.29).
- Although 59% direct mail to prospective visitors, only 52% have inhouse lists of prospects gathered through promotional activities (possibly they are using external lists).

Internet marketing

Most galleries (85%) have websites. Higher income, inner city galleries, and those with a permanent collection or mixed program (under 75% contemporary Australian) are more likely to have a website. Lower income and attendances suggest less likelihood of a website.

Only 19% of galleries provide a virtual gallery or catalogue of works online, even though virtual galleries reach a global audience.

Most galleries are not utilising the Internet's 'interactive' capabilities (development of online communities or e-networking through newsletters). Again, there is a pattern of higher income and better attended galleries utilising more of the options detailed in Chart 2.30, and particularly distributing an e-newsletter.

Of those with a website, 82% did not provide an estimate on the number of 'hits' received. While 'hits' are a crude measure (length of time on site and number of pages accessed provide more valuable insight), there is little evaluation of website effectiveness. Those who did respond received an average of 203 hits (261 for higher income galleries) a week.

Joint promotions

Galleries tend to confine joint promotions to other arts organisations (77%) or tourism agencies (65%). Higher income galleries are more likely to use all cross-promotional avenues detailed in Chart 2.31. Better-attended galleries are more likely to utilise cross-promotional opportunities with other arts and tourism agencies, but are on a par with all galleries when undertaking joint promotions with non-arts organisations.

Chart 2.32: Marketing successes

Gallery descriptions of recent marketing successes

Joint or cross-promotions	Twelve galleries refer to the value of being part of a festival program, e.g. Sydney Festival, Sydney Biennale, National Science Festival, National Multicultural Festival, Sydney Design Week, Melbourne Fashion Festival, Sydney 2000 Olympic Arts Festival, Archibald Prize, Ecofiesta. Others refer to joint promotions with the media (in particular local radio stations), sponsors, local bookstores, and hook-ups with other galleries.
Increased resources	Many of the marketing successes are attributed to the additional resources and promotional spin-offs from involvement with a festival. '*[We were] part of a festival so we had a publicist and a budget! We were really able to make the most of the unique international content and the presence of visiting artists.'* One gallery's recent appointment of a publicist generated an immediate increase in media coverage and attention, while another appointed a publicist to support a metropolitan event and subsequent tour, also with success. An Adelaide gallery attracted 20,000 paying visitors, achieving this figure on the back of the exhibition's connection with a major gallery that had a budget *'20 times larger than our usual advertising budget'*.
On-street visibility	Two galleries mention the impact of their imaginative on-street presence in attracting passers-by. One gallery conducted evening window screenings of its video exhibition for pedestrians.
Targeting	A targeted campaign for an international Chinese exhibition generated unprecedented attendance by the local Chinese and Taiwanese community for one gallery. The gallery worked closely with the Mandarin newspaper, Taiwanese Chamber of Commerce, Taiwanese Association and Australian trade organisations.
Media and advertising	Increased coverage in the mainstream media (ABC's *7.30 Report*, CNN, Foxtel, supplements in mass circulation dailies were cited) is frequently mentioned as reaching new audiences. Other successful advertising outlets include arthouse cinemas and street newspapers. One gallery said increased media coverage for their new retail space opened doors into new areas of industry. Two galleries said outdoor advertising (billboards) successfully reached new audiences. *'Not many people read the media—so reaching them is difficult.'*
Re-positioning	One craft gallery writes that '*by positioning exhibitions in terms of "design", the gallery has increased and diversified media coverage, which in turn is attracting new audiences*'.
Email and the Internet	Email promotion has grown so dramatically for one gallery that this is now their primary promotional tool, especially for live events, most of which they said sell out after the email promotion. Putting a 40pp catalogue online for a national exhibition reaped audience interest for another gallery. Others are attracting overseas buyer interest by uploading exhibition images and text to their websites. For one gallery, establishing email interest groups has generated growing national and international interest. A free email news service, available by subscription through the website, enables another gallery to cross-promote other local arts and academic events.

Base: all who responded in written form

Chart 2.33: Marketing failures

Gallery descriptions of recent marketing failures

New media	Presenting a difficult new media work in the Northern Territory—'*more education needed*'
Mass mailing	A mass mailing to 60,000 homes that produced minimal response
Too much information	Promotional materials that contain too much information
Targeting	Lack of a market for Indigenous work on Art.com (misguided target)
Media and advertising	Ineffectiveness of advertisements in the 'Gallery' sections of quality morning newspapers
Profile and attendance	A joint promotion and seminar that raised the profile of an exhibition but failed to increase attendances

Base: all who responded in written form

Membership schemes

Nearly half the galleries (46%) run membership programs, such as a 'Friends' scheme. Galleries showing predominantly contemporary Australian work (26%) and capital city galleries (32%) are less likely to have a membership scheme. Galleries with a mixed program (69%) and higher income (60%) are more likely to have a membership program.

Of the 45 galleries who have membership programs, 22 (47%) have between 12 and 228 members, with an average of 105. A further 21 (45%) have between 229 and 1,090 members, with an average of 572. Overall these 43 galleries have 14,320 members, or 333 each. Two larger galleries have substantially more members, and as they are an exception, these galleries and membership numbers are not included in the averages.

The annual membership fees for individual adults are as low as $10, but average at $50-$75. Some galleries charge substantially higher annual fees (as high as $2500). Many galleries have separate rates for individuals, families, concession, students, and corporate, overseas or life membership.

Marketing successes and failures

Galleries were asked to describe recent successes in marketing contemporary art. Many of their responses are set out in Chart 2.32.

Understandably the galleries were less responsive about marketing failures, but some provided examples as set out in Chart 2.33.

Chart 2.34: Perceived limitations to increasing audiences

Limitations expressed by galleries	**Galleries**
Galleries ticked applicable statements in the following list	%
Inadequate staff numbers	74
Insufficient funds to buy in expertise	63
Competition with other leisure activities	41
Lack of education in the school system	34
Range of facilities in our building	32
Quality of our building	26
Lack of skills within the organisation	19
Audiences / visitors do not like or understand contemporary visual art	13
Audiences / visitors do not like or understand contemporary craft	4

Base: all participants (n = 101)

Chart 2.35: Self-assessment of performance in 2000/2001

Performance measures on previous year	**Better**	**Same**	**Worse**	**No answer**
	%	%	%	%
Overall performance	70	15	6	10
Attendances	65	13	12	10
Media coverage	65	22	6	8
Quality of exhibitions	56	33	1	10
Number of exhibitions	35	46	6	14

Base: all participants (n = 101)

Limitations to increasing audiences

In order to increase audiences for contemporary art, galleries said they needed *more people* (74%) and *more money* (63%).

Most do not consider the prospective audience's poor understanding or dislike of contemporary art as a limitation to increasing attendances.

Competing attractions for leisure time (41%), inadequate education in the school system (34%), and the facilities (32%) and quality of the building (26%) are less important factors, according to many galleries.

Staff numbers are more of a concern for galleries in the middle income and attendance brackets (90%), those located outside of the CBD / inner city (86%), or based outside a capital city (84%).

The availability of funds is a great concern for galleries focusing on contemporary Australian work, and naturally for lower income galleries.

Summary of verbatim statements

Twenty-three galleries made further comments about limitations to increasing audiences (in addition to statements in Chart 2.34). Their responses strongly reinforce the degree to which galleries are hampered by lack of financial resources. With more money, galleries said they would appoint a publicist, do more advertising and promotion, invest in new technologies or conduct regular research programs. One wrote: '*We know what to do, we just don't have the money.*'

The lack of compelling, well-resourced exhibitions is also a contributing factor for some galleries.

The physical drawbacks for one Northern Territory gallery (lack of air conditioning to poor public transport and location) are also a factor in deterring audiences ('*people don't know where we are*').

Two galleries referred to the inherent '*conservatism*' of local audiences or the small population base in their catchment area. One described how the core audience for their gallery was older and not interested in anything that's too contemporary: '*We don't have much success in attracting a younger audience.*'

Two galleries specialising in Indigenous art referred to increasing competition in this genre, and one gallery attributes this to the growth in Top End tourism.

Performance assessment

Galleries were asked to assess their performance in a range of categories, comparing the current year (2001) with the previous year (2000).

The majority of galleries were satisfied with the current year's performance overall, saying they achieved better attendances and media coverage than in the previous year (Chart 2.35).