

About the audience

Chart 3.1: Contemporary art audience profile by attendance



Base: all participants (n = 1201)

Note: As attendance is based on participants' **memory** of time and frequency, these figures may not be entirely accurate predictors of contemporary art attendance numbers.

About the audience

A nationwide telephone survey was conducted with a random sample of 1201 people aged 18 years and over. An additional 200 active contemporary art visitors were targeted to ensure a reliable base for identifying current visitor characteristics, attitudes and patterns.

Further face-to-face research was conducted in two phases: an initial set of eight face-to-face in-depth interviews, and a follow-up of eight mini group discussions and six face-to-face interviews conducted in two cities (Sydney and Brisbane) and two regional centres (Townsville and Wagga Wagga).

The research stages, and demographic and geographic breakdowns of participants are detailed in *Data collection and research design*.

What is contemporary art, craft and Indigenous art?

An easily grasped verbal definition of ‘contemporary visual art and craft’ was required to measure attitudes and attendance patterns in the audience survey. This proved quite a difficult task, given a wide range of views about the historical span of the ‘contemporary’ period and its characteristics.

Following Reference Panel and Australia Council consultation, and face-to-face exploration of how people classified ‘contemporary art and craft’, it was agreed to use the following broad definition of the category in the audience survey:

Contemporary art and craft, that is visual art and craft that involves very new and different ideas, concepts or materials. It includes innovative use of paintings or sculpture through to the use of all sorts of objects, textiles, glass, photography, computer-generated images or a mix of those things.

Recent Indigenous art and craft, that is Aboriginal or Torres Strait Islander art and craft.

Profile of audience by attendance

In this research **visitors** are defined as:

Aged 18 years and over who have been to a contemporary art or craft exhibition in the past two years.

The 1201 ‘visitors’ interviewed in the telephone survey were grouped by their number of visits to any contemporary art exhibition in the past two years. The five visitor groups, detailed below, are constantly referenced in this chapter.

Visitor group	%	Visits in past 2 years
‘committed’ visitors	9	at least 4 visits
‘infrequent’ visitors	13	two or three visits
‘one-off’ visitors	9	only one visit
‘lapsed’ visitors	23	not in past 2 years, but previously
‘never’ visitors	46	never

Current visitors are defined as people who have been to a contemporary art exhibition at least twice in the past two years. They make up 22% of the audience surveyed and comprise ‘committed’ and ‘infrequent’ visitors.

Chart 3.2: Profile by attendance category

	TOTAL %	'never' %	'lapsed' %	'one-off' %	current %	'infrequent' %	'committed' %
Involvement in art:							
Parents encouraged interest	14	7	14	20	25		
Partner / friend introduction	26	18	33	37	34		
School encouraged interest	31	22	38	34	43	NA	NA
I like to be creative	36	28	40	36	49		
Always been part of my life	33	21	40	32	51		
<i>Base: All participants n=1201</i>							
	n=1201	n=541	n=276	n=98	n=285		
Gender:							
Male	49	54	47	56	40	41	39
Female	51	46	53	44	60	59	61
Age:							
18-29	23	20	19	33	32	29	33
30-39	20	18	26	13	21	24	20
40-54	28	26	25	36	32	33	31
55+	28	36	30	18	15	14	16
Area:							
Country	36	39	35	32	33	33	35
City	64	61	65	68	67	67	65
Education:							
Pr / Pt sec	20	28	15	11	11	9	12
HSC / equiv	20	21	21	10	22	27	16
Tertiary	36	27	40	53	46	46	53
Tech / TAFE	19	18	22	24	14	14	14
Occupational status:							
Blue collar	33	41	31	23	22	23	22
White collar	64	59	69	77	76	73	73
Work status:							
Working	58	55	60	70	60	NA	NA
Non-working	41	45	40	30	40		
Have children:							
Under 5 yrs	13	15	12	10	9		
5-17 yrs	24	23	22	22	27	60	53
18+ yrs	21	23	23	14	20		
Left home	26	32	24	23	15		
No children	35	29	37	49	43	40	47
Household income:							
\$40K or less	46	41	53	40	37		
\$41-\$70K	25	38	25	30	28	NA	NA
\$71K+	18	14	14	26	21		
Refused	10	8	13	4	15		
Parents born overseas:							
Yes	42	40	42	40	48	NA	NA
No	58	60	58	60	52		
Country of birth:							
Australia / NZ	78	79	77	85	76		
UK	10	9	10	4	14	NA	NA
Europe	4	3	6	3	2		
Other	9	9	7	8	8		
Art involvement:							
Art & design	6	2	9	3	15	9	28
Hobby	26	19	30	30	36	32	36
Creative	8	8	9	13	8	9	9
<i>Base: All participants (n=1201)</i>							
	n=1201	n=556	n=275	n=103	n=264	n=278	n=206

Who attends (and who doesn't)

Profile of the contemporary art audience

Chart 3.2 opposite provides detailed profile information.

Chart 3.3: Demographics

Attendance (visits to a contemporary art exhibition in the last two years) analysed by demographics

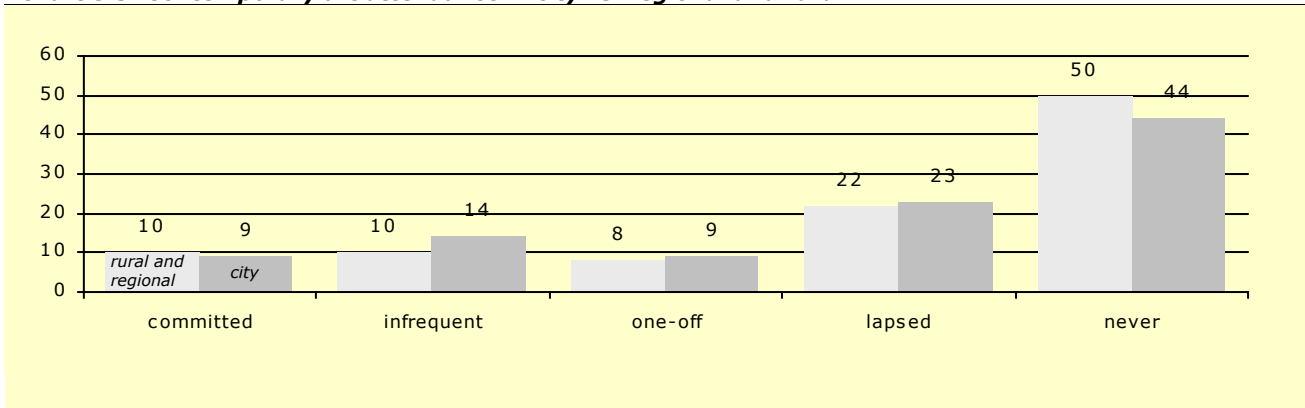
Current visitors			Non-visitors	
Committed (4+ times)	Infrequent (2-3 times)	One-off (once)	Lapsed (for 2+ years)	Never
Female bias, 18–29 years, tertiary educated, with children. Often artists / designers. Marginal UK born bias.	Similar to 'committed' visitors but less definite demographic profile. Marginal female bias, 18–29 years, tertiary educated, without children.	Male bias, over 40 years, employed. Introduced by partner or friend.	Female bias, either over 55 years, or 30-39 years with children. Presumably lapsed for lifestyle (age or family commitment) reasons.	Male bias, over 55 years, lower income, socio-economic and educational levels. No history of school or parental encouragement. At least second generation Australian.

Chart 3.4: Attitudes

Attendance analysed by attitudes

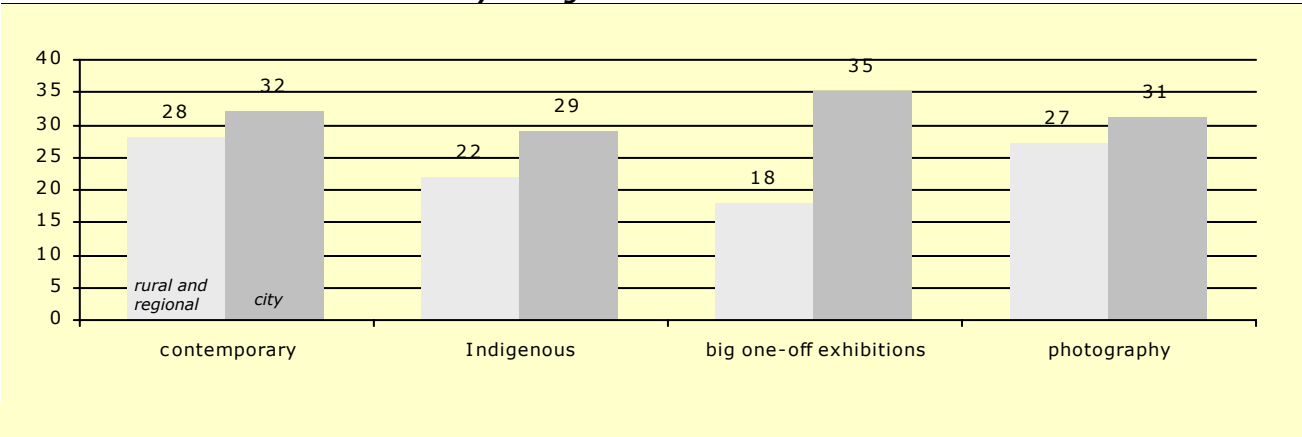
Current visitors			Non-visitors	
Committed (4+ times)	Infrequent (2-3 times)	One-off (once)	Lapsed (for 2+ years)	Never
Art is very important to them. Committed to keeping up with latest directions. Like the escape and excitement of contemporary art. Like to stretch the mind. Are passionate about it. Tend to know what is on.	Positive, but less committed. Some prefer 'realistic' familiar art. Less likely to be looking for excitement and escape and the latest directions than frequent visitors. Importantly, a high 46% claim they never know what contemporary art is on.	Positive, but have a more social attitude to art; prefer to go with friends and family. Like the refreshing aspect and stretching of the mind, reflecting 'now'. However, also have a very limited knowledge of what is on and where.	Generally positive, but have lifecycle barriers. Too hard to get there. The whole experience is too expensive. Limited knowledge of what is on. Have some preference for more 'realistic' art.	Prefer 'realistic', familiar art. Lack of understanding of contemporary art. Need to be pushed by others. Very limited knowledge of what is on where. Feel alienated by perceived 'contemporary' audience image. No peer involvement.

Chart 3.5: Contemporary art attendance – city vs. regional and rural



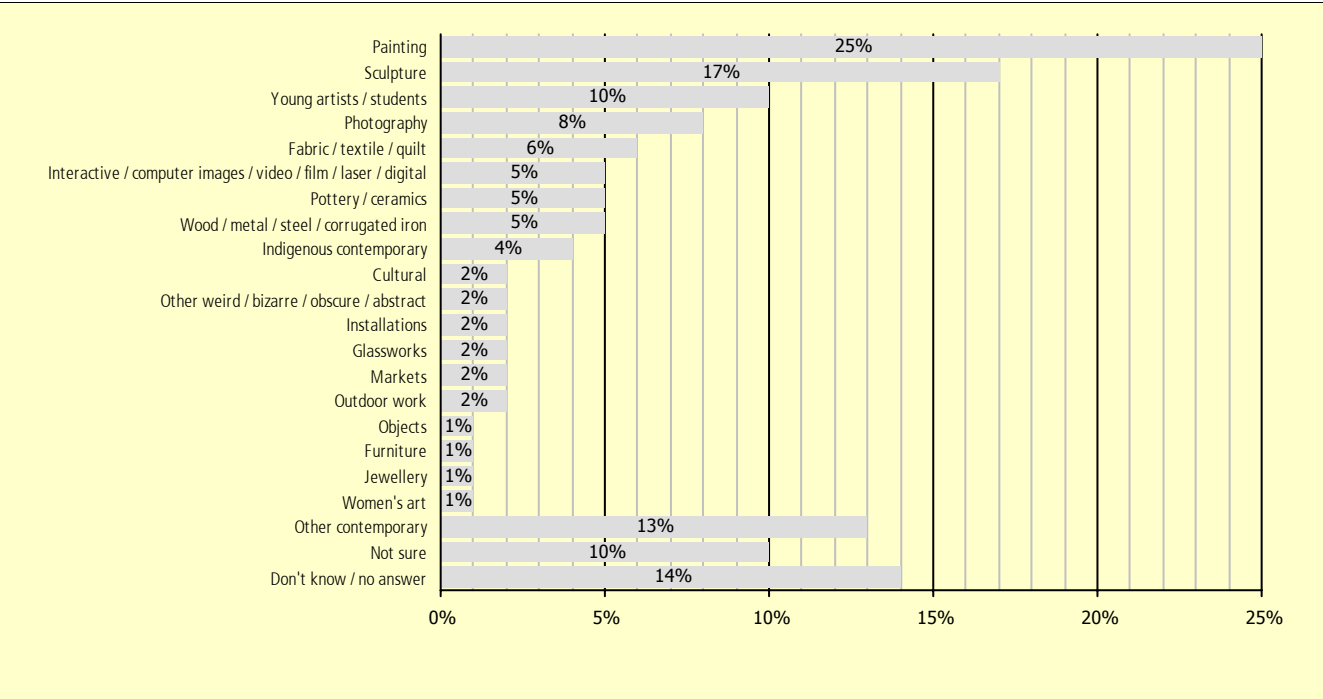
Base: all participants (n = 1201)

Chart 3.6: Visual arts attendance – city vs. regional and rural



Base: all participants (n = 1201)

Chart 3.7: Last exhibition attended



Base: all contemporary art visitors (n = 484)

Regional and rural attendance

The demographic profile of contemporary art visitors is broader in regional and rural Australia. They are more likely to be female, and on average, are slightly older. They are less likely to have a tertiary education, and more likely to be married, with children, and on lower household incomes.

Proportional attendance among people from regional and rural areas is only marginally less than city people, with 78% having ‘ever’ seen any kind of art exhibition. A higher proportion of regional and rural people (50%) had never visited a contemporary art exhibition, in contrast with 44% of city people (Chart 3.5).

Overall it appears that contemporary art has a relatively high level of commitment in regional areas, attracting similar proportions to the city, even though one-third of regional and rural visitors travel to another town or city to participate. Accessibility is clearly more of a barrier.

While there is the same level of frequent attendance among ‘committed’ visitors in the city and in regional and rural areas (9% and 10% respectively), there are marginally less ‘infrequent’ and ‘one-off’ visitors in regional and rural areas (23% in the city in contrast with 18% in regional and rural areas).

Attendance levels are lower among regional and rural people for other forms of visual art, particularly the big one-off exhibitions (Chart 3.6).

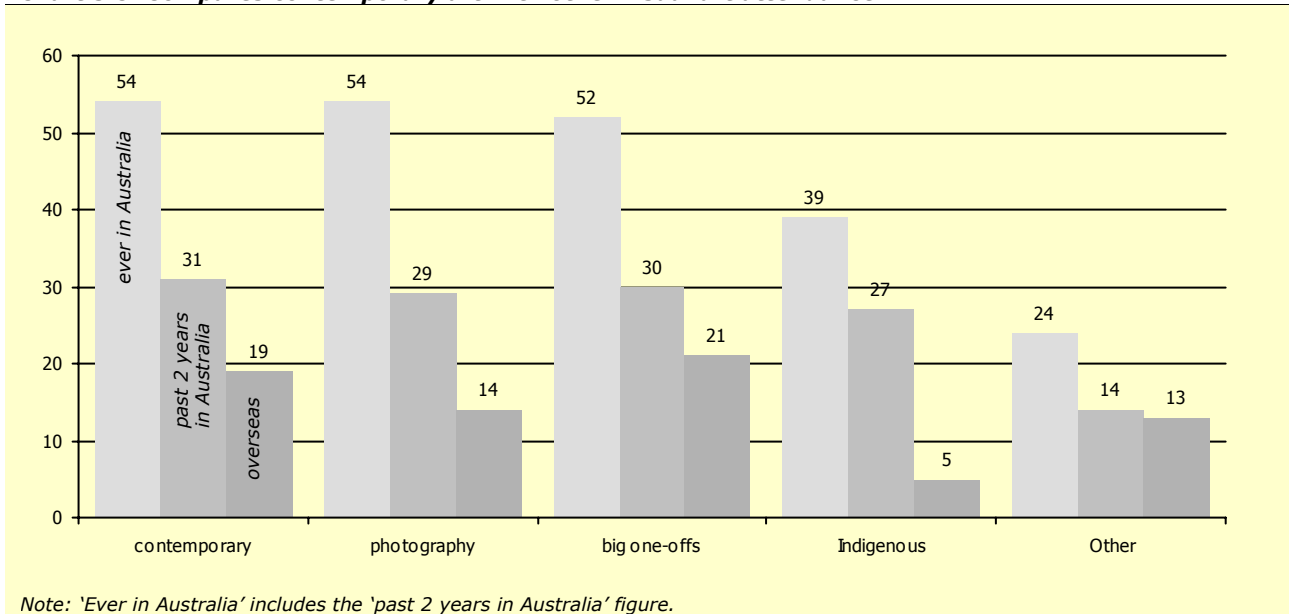
The last exhibition attended

The last contemporary art exhibition attended by all the people surveyed most commonly featured paintings (25%), followed by sculpture (17%) (Chart 3.7). Attendance at either of these tended to be slightly higher among people from regional and rural areas (35% paintings and 23% sculpture).

Works by young artists and students attracted 10% of people on their last visit, particularly among the 18–29 year old visitors (17%). Only 5% of people last attended a new media exhibition.

A more diverse range of contemporary art—particularly textiles, ceramics, interactive, installations, and other forms described as ‘bizarre’ or ‘obscure’—attracted a higher attendance from ‘committed’ visitors. A quarter were unable to remember or describe in detail the last contemporary art exhibition they had attended. This was highest among ‘infrequent’ visitors (30%) and older visitors (34%).

Chart 3.8: Compares contemporary art with other visual art attendance



Note: 'Ever in Australia' includes the 'past 2 years in Australia' figure.

Base: all participants (n = 1201)

Chart 3.9: Multi-category attendance in the last two years

Category	Contemporary	Photography	Big one-offs	Indigenous
	%	%	%	%
Big one-offs	53	57	100	50
Photography	60	100	56	56
Indigenous	51	51	45	100
Contemporary	100	63	54	58
Other	15	18	13	19

Base: all participants (n = 1201)

n=367

n=351

n=357

n=319

For example, the first column shows that of those who had been to a contemporary art exhibition in the past two years, 60% had also attended at least one photography exhibition, 53% a big one-off exhibition and 51% an Indigenous exhibition.

Chart 3.10: 'Lapsed' and 'never' visitor attendance at other visual arts

Category	total visitors	'lapsed' visitors	'never' visitors
	%	%	%
Big one-offs	30	34	13
Photography	29	28	10
Indigenous	27	30	9
Other	14	17	10

Base: all participants (n = 1201)

Attendance at other visual artforms

A total of 54% of people claimed to have visited an exhibition of contemporary art in Australia at least once in their lifetime. But how many have also attended photography, Indigenous or big one-off exhibitions in Australia and overseas?

Attendance levels were very similar across artforms (Chart 3.8), with 54% of people 'ever' attending a photography exhibition in Australia and 52% 'ever' attending a big one-off (famous artist or blockbuster) exhibition in Australia. Attendance crossovers in all the visual art categories (Chart 3.9) suggest opportunities for cross-promotion.

Recent Indigenous art had a lower level of 'ever' attendance (39%), but levels of past two-year attendance are almost as high as contemporary art and big one-off exhibitions. This indicates either more recent growth or a more loyal visitor base.

The majority of those not attending contemporary art appear to have limited interest in the other visual arts. Of the 46% of people who had never attended a contemporary art exhibition, only 9% to 13% had been to Indigenous, photography and big one-off exhibitions. Lapsed contemporary art visitors (23%) are more likely to attend other visual art exhibitions; between 30% and 34% had been to Indigenous, photography and big one-off exhibitions (Chart 3.10).

Visitors to all forms of visual art are more likely to be female and tertiary educated. The household income analysis shows that current contemporary art visitors are from higher income groups than visitors to the other visual arts. Current visitors also have a younger profile.

Visitors to Indigenous art, compared to the other artform visitors, are significantly more likely to have school age children. See page 66 for a full profile of the Indigenous art audience.

Using language

The phrase 'contemporary art' can arouse negative responses

The initially agreed definition of 'contemporary art and craft', and particularly some of the words used, aroused negative responses from some people in the face-to-face interviews. This could impact on how contemporary art is promoted.

Specifically, describing an exhibition as 'contemporary art' can be off-putting to some not familiar with the breadth of contemporary work; they immediately think of extreme and challenging works, and are discouraged from attending.

They also associate contemporary art with jargon—for example, as one 'infrequent' visitor said, *'whenever I see or hear the word "installation" mentioned about an exhibition, I immediately switch off.'*

When the research team talked to some 'one-off', 'lapsed' or 'never' visitors about 'contemporary' art, their preconception of *'weird, elite, extreme'* exhibitions evoked further comments like:

'That pile of cigarette butts, empty coffee cups and rubbish that the cleaner cleared up by mistake'

'A stupid big blank wall with one small block of red in the middle'

When these same people were shown images of a wide range of contemporary art (textiles, jewellery, ceramics, glass or other objects) they were more positive. Some were clearly intrigued by aesthetic qualities (shape, colour, intricacy or cleverness) they would never have associated with 'contemporary art'.

The word 'craft' can have pejorative connotations

'Craft', whether contemporary or not, is perceived as involving practical, usable, handmade, amateur or old-fashioned works.

This suggests that when encouraging new audiences to attend, it is important to communicate with visual examples rather than simply tagging the exhibition as 'contemporary' or the work as 'craft'.

Chart 3.11: Audience attitudes on art in general

Participants in face-to-face interviews made the following statements about art in general. Participants in the nationwide telephone survey were asked to state their level of agreement with each statement.

	Total	'never'	'lapsed'	'one-off'	current
	%	%	%	%	%
<i>agree strongly / tend to agree</i>					
Nice to go to galleries with <u>friends and family</u>	81	72	87	95	89
Art is <u>not really important</u> to me	25	37	21	12	8
I tend to prefer art I'm <u>familiar</u> with	49	63	42	38	31
It's important to keep up with latest directions in art	38	35	44	26	42
Like to see art that will really make me think	73	65	74	82	84
Only go if someone else suggests it	30	43	26	13	15
Art & craft exhibitions are sometimes good to <u>entertain kids</u>	62	56	65	71	68
Like art that takes me <u>away from my everyday life</u>	67	60	74	66	74
Like art that shows aspects of different cultures	87	81	92	85	94
Indigenous art is really interesting	74	69	77	79	81
I mainly enjoy art that is <u>realistic</u>	61	70	61	56	44
Base: all participants (n = 1201)	n=1201	n=541	n=276	n=98	n=285

Chart 3.12: Audience attitudes on contemporary art

Participants in face-to-face interviews made the following statements about contemporary art. Participants in the nationwide telephone survey were asked to state their level of agreement with each statement.

	Total	'never'	'lapsed'	'one-off'	current
	%	%	%	%	%
<i>agree strongly / tend to agree</i>					
Passionate about contemporary art / take up any opportunity to see it	24	15	24	24	42
Contemporary art is boring	22	35	17	8	5
<u>Never know what</u> contemporary art exhibitions are on	62	75	63	51	42
<u>Don't really understand</u> contemporary art	48	68	41	34	23
Only go to contemporary art when on holidays or have visitors	33	43	36	28	13
CAC* people can <u>look down on</u> you if you don't know much about it	39	45	40	23	32
Contemporary art is <u>refreshing and exciting</u>	64	47	68	78	86
<u>Don't have anyone to go to contemporary art with</u>	32	45	28	25	13
<u>Too hard to get to</u> contemporary art exhibitions.	32	37	35	30	19
Contemporary art is good because it really <u>stretches the mind</u>	74	61	80	78	90
<u>Don't think contemporary art requires as much talent as other art</u>	28	35	32	19	15
Contemporary art reflects what is happening in our society now	64	58	62	69	77
Whole experience of going to contemporary art is too <u>expensive</u>	22	26	25	16	13
People who go to contemporary art keep up with the latest <u>trends</u>	44	51	40	36	39
Contemporary art is not appropriate with young kids	35	41	34	34	26
Contemporary art exhibitions are often a bit stark and unwelcoming	34	40	32	28	26
Base: all non-rejectors (n = 1166)	n=1166	n=507	n=276	n=98	n=285

* CAC = Contemporary art and / or craft

Audience attitudes on art and contemporary art

Participants were read a series of statements and asked whether they agreed or disagreed with each statement. One group of statements was about art in general (Chart 3.11), and another specifically about contemporary art (Chart 3.12).

The following attitude profiles were built for each visitor group by studying the levels of agreement with statements in each of these charts. The highest response for each statement is also highlighted in the charts. Key words in the profiles below are italicised to show their connection to the underlined statements in each table. These attitude profiles may contribute to strategies for increasing attendances.

Most people (across all visitor groups) agreed with the following statements:

- ◆ *Art is good for when you want time alone in a quiet environment (73%)*
- ◆ *I think art should help you relax and unwind (78%)*
- ◆ *Indigenous art is an integral part of our culture (85%)*
- ◆ *It is important to support new artists (89%)*
- ◆ *I like art that shows aspects of different cultures (87%)*

'Never' visitors

Art is *not really important* to people who've never visited a contemporary art exhibition, but they enjoy *realistic* art they are *familiar* with. They are the last to know *what's on*, and only go if *someone else* suggests it.

People who go to contemporary art are seen as *'trendy'*. They *look down on* 'never' visitors, who *don't really understand* contemporary art and do not feel part of its audience. Art is not a part of their personal culture; they have *no-one to go with*, and regard it as an inappropriate activity for *children*.

'Never' visitors are also the most likely to see contemporary art as *boring* or *stark and unwelcoming*. Most also have limited interest in other visual arts.

How complete is the rejection by 'never' visitors?

To assess potential interest among the 46% who have never been to a contemporary art exhibition, they were asked whether or not they might go in future. Twenty-two per cent said they probably or definitely would go, 18% were not sure, and 6% said they probably or definitely would not go. This indicates a neutral disposition rather than outright rejection.

'Lapsed' visitors

'Lapsed' visitors, like 'never' visitors, mainly enjoy *realistic* art. However, they like art that takes them *away from their daily life*, and approve of contemporary art because it *'stretches the mind'*. 'Lapsed' visitors are a little more likely than 'never' visitors to have been to other types of visual art.

More 'lapsed' than 'never' visitors know *what's on* in contemporary art, but they often feel it's *too hard to get to* exhibitions, and find the experience *too expensive*.

'One-off' visitors

'One-off' visitors appear to have a more social attitude to art. They like to go to galleries with *friends and family* and think the experience is a good way to entertain *children*. They regard contemporary art as *refreshing and exciting* and agree that it *stretches the mind* and reflects what is *happening in our society* now.

More of them know *what's on* than 'lapsed' visitors, but around half (51%) *never know what contemporary art exhibitions are on*.

Current ('committed' and 'infrequent') visitors

Current visitors clearly think differently to other groups about many aspects of art in general, and contemporary art in particular. They like art that *makes them think*, takes them away from *everyday life*, and shows aspects of *different cultures*.

Current visitors are the most positive about many aspects of contemporary art. They find it *refreshing and exciting* because it *really stretches the mind* and reflects what is happening in our *society* now. Despite their positive attitude, many current visitors still believe they never know *what's on*.

Chart 3.13: Attitudes of 'committed' and 'infrequent' visitors on art in general

Participants in face-to-face interviews made the following statements about art in general. Participants in the nationwide telephone survey were asked to state their level of agreement with each statement.

	total %	infrequent %	committed %
<i>'agree strongly' / 'tend to agree'</i>			
Like art that shows aspects of different cultures	94	93	94
Indigenous art is an integral part of our culture	88	87	89
Nice to go to galleries with friends and family	87	88	87
Like to see art that will really make me think	85	84	85
Indigenous art is really interesting	81	83	77
I think art should help you <u>relax and unwind</u>	77	79	73
Like art that takes me away from my <u>everyday life</u>	75	71	80
Good when you want time alone in quiet environment	71	71	71
Art and craft exhibitions are sometimes good to entertain kids	68	65	72
It's important to keep up with <u>latest directions</u> in art	51	43	60
I mainly enjoy art that is <u>realistic</u>	43	49	36
I tend to prefer art I'm <u>familiar</u> with	32	38	24
Only go if someone else suggests it	14	18	10
Art is not really important to me	7	6	9
Base: all visitors (n = 484)	n=484	n=278	n=206

Chart 3.14: Attitudes of 'committed' and 'infrequent' visitors on contemporary art

Participants in face-to-face interviews made the following statements about contemporary art. Participants in the nationwide telephone survey were asked to state their level of agreement with each statement.

	total %	infrequent %	committed %
<i>'agree strongly' / 'tend to agree'</i>			
It's important to support new artists	96	94	98
Contemporary art is good because it stretches the mind	90	88	93
Contemporary art is <u>refreshing and exciting</u>	84	82	87
Contemporary art reflects what's happening in society now	77	76	79
Passionate about contemporary art and craft and take up any opportunity to see it	41	30	56
<u>Never know what</u> contemporary art exhibitions are on	38	46	28
People who go to contemporary art really keep up with latest trends	38	32	46
People who go to contemporary art can look down on you if you don't know much about it	32	32	33
Contemporary art exhibitions are often a bit <u>stark and unwelcoming</u>	29	34	23
Contemporary art is not appropriate with young kids	27	28	26
Don't really understand contemporary art	25	28	20
Too hard to get to contemporary art exhibitions	19	20	19
Whole experience of going to contemporary art is too expensive	16	15	17
Don't think contemporary art requires nearly as much talent as other art	15	19	9
Don't have anyone to go to contemporary art with	12	12	12
Only go to contemporary art when on holidays or have visitors	11	14	7
Contemporary art is boring	6	6	5
Base: all visitors (n = 484)	n=484	n=278	n=206

Contrasting attitudes between 'infrequent' and 'committed' visitors

'Infrequent' visitors have slightly different attitudes to 'committed' visitors and are discouraged by the more extreme aspects of art. They are more likely to prefer *familiar, realistic* art that helps them *relax and unwind* (Chart 3.13).

More 'infrequent' visitors *never know what's on*, and many find contemporary art exhibitions *stark and unwelcoming*.

'Infrequent' visitors are less likely to describe contemporary art as *refreshing and exciting* or to like art that takes them away from *everyday life*. They are less interested in keeping up with the *latest directions* in art (Chart 3.14).

Differences between city, regional and rural attitudes

There were only very marginal differences in attitudes between city, regional and rural people regarding art and contemporary art, the most pronounced being:

'I mainly enjoy art that is realistic' (regional and rural 68%, city 57%)

'I would only go to contemporary art exhibitions when I am on holidays or have visitors' (regional and rural 37%, city 31%)

'It is too hard to get to contemporary art exhibitions from where we/I live' (regional and rural 55%, city 19%). Accessibility is clearly a major concern.

Culturally diverse backgrounds

In-depth analysis of people from culturally diverse backgrounds is difficult owing to the high number of countries of origin, which result in small individual sample sizes. There are, however, some notable patterns. People from European backgrounds had a marginally lower level of contemporary art patronage (16% in the past two years compared to 22% for current visitors).

More agreed that *new artists* should be supported, and that it is important to keep up with *new directions*. But they are the least likely group to know *what's on*, and tend to only visit when on *holiday* or when *someone else* prompts the visit.

It seems there is potential to further encourage this group; they tend to have high usage of restaurants and participation in art classes, and clearly use community radio and other focused media to keep informed.

Student art attracts wider interest

Although often very contemporary and sometimes challenging, student works are considered more approachable for wider audiences, and are therefore useful in exposing newcomers to contemporary art.

Some 'one-off' or 'infrequent' visitors have seen exhibitions of HSC artwork, or tertiary undergraduate exhibitions. Some visitors personally knew the students or were family, but others had attended out of curiosity to see what young people were doing. Visitors describing these exhibitions often expressed admiration for the imagination and achievement of young artists.

'Looking at the work the kids can do is really inspiring.'

'They have such great imaginations.'

Involvement and enjoyment is also enhanced by identification of young people with the community. Students are not regarded as professional artists or people who belong to a narrow group outside familiar, everyday life. As a result, less frequent visitors were not so shy about attending or fearful of feeling out of place.

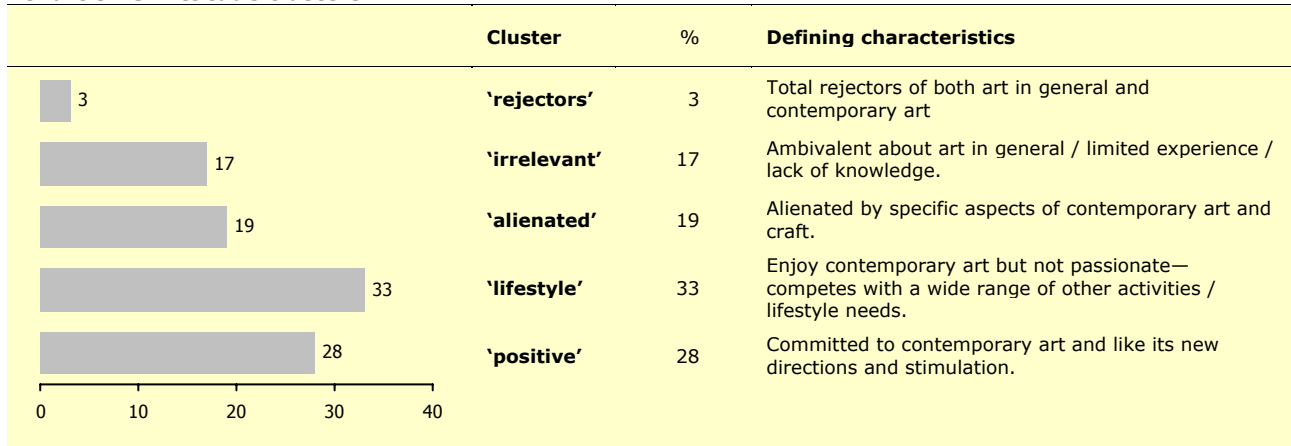
New media art polarises audiences

New media art drew polarised views. Some serious contemporary art followers think new media is comparatively shallow, relying more on special effects and the latest technology than on creativity or thought.

Others however, particularly 18–24 year old males, see new media as the artform of now and the future, reflecting their lives and environment, and say they find it more involving and entertaining than many other forms of contemporary art.

The core new media audience—constantly looking for a very new approach, technique or application—need to be 'thrilled' each time. They are easily bored by anything they have already seen. This could limit their frequency of attendance.

Chart 3.15: Attitude clusters



Base: all participants (n = 1201)

Chart 3.16: Contemporary art attendance analysed by attitude clusters

Contemporary art attendance categories	rejectors	irrelevant	alienated	lifestyle	positive
	%	%	%	%	%
Ever attended in Australia	7	27	30	62	84
Frequency of visits in past 2 years					
Once	1	4	5	11	12
2 or 3 times	-	7	3	16	21
4 or more times	-	1	1	6	26
Not in past 2 years or never	99	88	91	67	41

Base: all participants (n = 1201)

Audience 'attitude clusters'

Like-minded participants were further analysed by their attitudes to art and contemporary art. Five clusters emerged, summarised in Chart 3.15. These differences in attitudes towards art and contemporary art appear to affect people's predispositions and behaviour, as detailed below.

The 'rejectors' cluster

People in this small cluster have never been to art exhibitions and are clearly not interested in attending art or contemporary art events in the near future. They are often older (65+) males who are more likely to live in outer metropolitan areas, regional towns or rural areas.

The 'rejectors' cluster is not a target for contemporary art since art is not important to them.

The 'irrelevant' cluster

These people are ambivalent about art. They don't think art is important, or a pleasurable activity to participate in with friends and family. They have no particular interest in Indigenous art and very limited experience of art in general, either in Australia or overseas. They find contemporary art boring, somewhat stark and unwelcoming, and claim they don't understand it. They don't think contemporary art requires much talent, and are often put off by the 'offensive' feeling they get from it. They can therefore perceive it as being 'expensive' for what they get in return.

They are generally non-attenders of contemporary art, but some have limited experience. When they do attend exhibitions, their preference is to have a short label next to the work and nothing else. Given their lack of interest, they don't feel they should have to read a lot of information.

People in the 'irrelevant' cluster are more likely to be male, over 55 years of age, with a low to mid-level of education, mostly married with children, and white to upper blue collar with a relatively high level of income. They have the second highest average commercial television usage, the highest weekly radio (commercial and overall) radio usage, and are most likely to participate in or watch sport.

It seems this group will be relatively difficult to motivate without changing their overall attitude towards art and its benefits.

The 'alienated' cluster

These people don't feel part of the contemporary art audience. They like familiar and realistic art and think galleries are good when you want time alone in a quiet environment to relax and unwind. However, they need to be pushed to go to exhibitions. They don't really understand contemporary art or feel it requires much talent, and find it 'boring'. They often don't know what's on, say they have no one to go with and feel it will be too expensive. They think contemporary art visitors are 'trying to keep up with the latest trends' and 'look down on people like themselves'.

Although they are similar to the 'irrelevant' cluster in terms of their lack of motivation and lower opinion of contemporary art, they have some interest in art generally and look for variety, realism and specific artists when they go to an exhibition. They are put off by 'weird' work. They haven't been to many art exhibitions, whether in Australia or overseas, but with a higher proportion of lapsed visitors in this cluster, they are more likely to have attended contemporary art exhibitions than people in the 'irrelevant' cluster. When they do attend exhibitions, they are more likely to want a lot of detail about the work and the artist in both leaflets and audio guides.

People in the 'alienated' cluster are more likely to be older (33% over 65 years of age), with a low to mid-level of education, a lower level of income and are less likely to be working (retired or home duties). They are the highest users of TV (commercial, ABC and SBS) and community radio. People in the 'alienated' cluster are more likely to live in regional and rural areas.

Motivating this group will require some specific strategies to change their perceptions about contemporary art and the negative stereotypes they associate with it.

Chart 3.17: Leisure activities of contemporary art visitors

Leisure activity	Attendance groups									
	total %		never %		lapsed %		one-off %		current %	
	Regular	Some-times	Regular	Some-times	Regular	Some-times	Regular	Some-times	Regular	Some-times
Dining / eating out	40	50	33	55	46	47	41	53	47	45
Visit library	32	40	26	40	31	44	32	34	46	37
Travel overseas	13	43	11	38	17	46	13	46	11	52
Go to classical music	5	29	5	25	5	35	8	29	5	42
Go to contemporary or experimental music	4	24	2	20	3	28	3	40	10	38
Go to the theatre	12	53	7	47	12	56	17	58	19	62
Go to the movies	28	54	21	53	31	54	38	56	35	55
Go to the opera	1	18	1	12	*	20	*	22	2	25
Go to popular or rock music	8	42	6	37	8	36	9	60	14	49
Use the Internet	44	21	33	21	45	22	64	21	60	20
Go to contemporary dance	3	19	2	15	3	19	4	21	5	32
Go to contemporary theatre	3	33	2	29	1	42	5	50	7	48
Participate in or watch sport	50	30	50	31	50	33	52	33	49	29
Go to cultural events	12	55	7	41	9	66	17	74	22	68
	n=1201		n=541		n=276		n=98		n=285	

Base: all participants (n = 1201)

‘One-off’ visitors with some exposure to contemporary art are surprisingly close to the more regular visitors in their leisure activities. This is important because we regard this group as an easier target (than those who have never experienced contemporary art) for encouraging more frequent attendance.

Chart 3.18: Leisure activities: city compared to regional and rural contemporary art visitors

Leisure activity	Current visitors						Total participants			
	Total %		City %		Country %		City %		Country %	
	Regular	Some-times	Regular	Some-times	Regular	Some-times	Regular	Some-times	Regular	Some-times
Dining/eating out	47	46	51	43	38	52	43	50	34	50
Visit library	42	39	46	35	33	46	32	42	31	37
Travel overseas	11	49	14	55	46	39	16	45	7	40
Go to classical music	9	37	12	42	3	28	6	33	4	22
Go to contemporary or experimental music	9	36	9	40	9	28	4	26	4	19
Go to the theatre	19	62	22	61	12	64	14	57	9	47
Go to the movies	35	55	38	52	31	30	32	54	20	54
Go to the Opera	2	26	4	32	*	12	1	21	1	10
Go to popular or rock music	14	49	15	47	12	54	9	43	7	39
Go to contemporary dance	6	30	6	35	7	21	3	20	2	17
Go to contemporary theatre	7	48	8	50	5	44	3	35	2	30
Participate in or watch sport	47	30	41	34	59	23	48	32	53	28
Go to cultural events	23	65	24	66	22	64	13	56	9	53
	n=484		n=324		n=161		n=778		n=423	

Base: current visitors (n=484)

The 'lifestyle' cluster

People in the 'lifestyle' cluster do go to contemporary art exhibitions, but without the 'passion' of the 'positive' cluster. They enjoy art that shows aspects of different cultures and believe Indigenous art is an integral part of our culture. They are likely to go to exhibitions to relax, unwind and stretch their mind. To some degree, they find contemporary art refreshing and exciting.

They have been to contemporary art and photography exhibitions in the past but tend to have many competing leisure activities. Their contemporary art attendance has dropped away due to time and lifestyle constraints. 'Lifestyle' people are from all age groups, often married but not necessarily with children, with a mid to high level of education, typically mid level income and are more likely to be employed full-time. A friend or partner often introduced them to art. They often use the Internet for email and finding out what's on, and sometimes view contemporary art online. They are more likely to go to the theatre, and play or watch sport.

Contemporary art exhibitions clearly compete with a wide range of other activities. This suggests the need to reinforce their already acknowledged benefits of attendance (excitement, stretching the mind), and maintain a presence to attract their interest.

The 'positive' cluster

People in this cluster are very enthusiastic and passionate about art, specifically contemporary art. They attend exhibitions regularly, keep up with new directions in art and feel contemporary art reflects what is happening in society now.

'Positives' are interested in art (including Indigenous art) on a broad level and feel it is an appropriate entertainment for children. They find art refreshing and exciting and see it as a means of escaping everyday life. They also enjoy contemporary art because it encourages them to stretch the mind.

They attend many different kinds of art exhibitions in Australia or overseas. They like all aspects of contemporary art (emotional, spiritual and the art itself) and find it very stimulating. Although they like finding out about the artist and the work, a brief outline of the work is sufficient, with perhaps a leaflet to take away.

By comparison with other attitudinal groups, the 'positive' cluster is more likely to be young, female (18 to 24), single without children and living in the city. They are often students or unemployed and have a high level of education. Some 'lapsed' and 'one-off' visitors are also in this cluster.

'Positives' are more likely to regularly travel, eat out, go to the movies, pop and rock music or other cultural events, and often use the Internet to view art and contemporary art. Many were introduced to art by their parents, and they consider themselves creative and see art as a part of their lives. They are more likely to read newspaper arts pages or art magazines, listen to ABC radio, and watch arts programs on ABC and SBS television.

The challenge with this cluster is maintaining and increasing their level of interest while not alienating other target groups.

Cross-promotional opportunities

To more strategically target cross-promotions to the current visitor group, look at audience leisure patterns in Chart 3.17.

Current visitors are clearly quite socially and culturally active. Their regular activities include *dining and eating out*, visiting a *library*, going to the *movies* and using the *Internet*. Their occasional activities include going to the *theatre*, *travelling overseas*, going to *contemporary* or *experimental music*, *contemporary dance*, the *opera* and *contemporary theatre*. Both current and non-visitors watch or participate in *sport* at about the same level.

Regional and rural visitors participate in fewer other leisure activities than city visitors (except for sport—see Chart 3.18). They have relatively similar levels of contemporary art attendance, suggesting that art may have a higher 'share' of leisure time among regional and rural people. This suggests an opportunity to grow contemporary art audiences in regional and rural areas.

Chart 3.19: What the audience likes about contemporary art

The audience likes ...	total %	lapsed %	one-off %	current %
Net understanding / keeping informed about the artist / expression of creativity	58	54	56	62
Seeing what other people are thinking / what is affecting them / to gain insight	21	19	21	24
I like to see what the artists are doing / their techniques / use of materials	19	21	19	17
It's different to the art I normally see	13	12	17	13
I like the <u>creativity</u> / originality	10	9	14	9
Enjoy seeing <u>skill</u> of the artists	5	4	3	6
Like to see how others express themselves	4	4	2	1
Like to see new artists	3	2	-	4
I like to keep tabs on other artists	3	2	2	4
Net work exhibited	32	27	35	35
I like to see new / <u>fresh</u> ideas / work	15	12	25	16
I like the use of <u>colour</u>	9	10	6	9
I like the variety / <u>diversity</u> of art / craft	6	5	8	6
I like the usage of form / structure	3	4	3	2
I like the way the exhibitions are organised / laid out / presented	2	2	3	3
I like to see if there's anything I would like to buy	1	2	1	3
Net stimulation / escape aspect	30	24	37	36
I find it thought provoking / <u>stimulating</u>	19	15	24	20
I like the message behind the art / trying to work out what the message is	6	7	4	6
It's a distraction / escape from the mundane / everyday life	6	8	4	4
Contemporary art expands the boundaries / challenges one's perceptions of art	5	*	7	9
Net emotional aspect	18	17	19	18
Contemporary art / craft is <u>interesting</u>	7	7	6	8
I find it <u>relaxing</u> / calming	6	9	7	3
I find contemporary art / craft innovative / <u>exciting</u>	3	1	2	5
I like the <u>humour</u> / absurdity of it	3	1	4	4
Net entertainment aspect / leisure activity / social	5	5	3	6
It's just a nice way to spend time	4	3	2	4
People who go to contemporary art are really relaxed / I like to chat with them	2	1	*	3
Base: all who have ever been to contemporary art (n = 661)	n=661	n=276	n=98	n=285

Chart 3.20: What the audience dislikes about contemporary art

The audience dislikes ...	total %	lapsed %	one-off %	current %
Net dislikes about style / idea / message	18	16	15	20
I don't understand it / difficult to understand	7	8	5	9
Not proper art	3	3	5	2
Lacking skill	3	4	*	2
Has no point / message	3	1	*	5
Message more important than the work	1	-	5	1
Very broad term / don't know what to expect	1	-	3	1
Exploitation of art	1	1	-	1
Self indulgent	1	*	*	1
Fashion oriented / follow big names	*	-	-	1
Net dislikes about the look of the work	17	15	22	16
Too weird / unusual / way out	5	4	4	8
Too abstract	5	6	5	4
Not realistic	3	3	7	1
It is not my type of art	3	2	5	3
Not aesthetically pleasing	2	2	2	1
Kitsch / tacky	1	-	4	1
Too similar to each other	1	1	1	*
Perishes / decays	*	-	-	1
Anti-establishment	-	-	*	*
Net dislikes about emotional aspects	12	11	18	12
Offensive ideas / subject	5	4	11	5
Intellectually smug / pretentious	5	5	4	5
Boring / not interesting	1	*	3	1
Pornographic	1	*	2	1
Opinionated	*	1	*	*
Sensationalist	*	*	-	1
Inaccessible	*	*	-	*
Net dislikes about practicalities	8	7	2	11
Too expensive	5	4	1	7
Crowds	3	2	-	4
Poorly laid out gallery / bad lighting	1	1	-	2
Not enough parking	1	-	-	1
Not enough / not knowledgeable guides	*	*	1	*
Large queues	*	*	-	*
Net dislikes about lack of information / advertising	3	1	2	5
Should make more accessible / public more aware / more advertising	2	1	1	4
Lack of information with / about exhibits	1	-	*	1
Net dislikes about atmosphere	1	-	*	3
Stale / not new	1	-	*	2
Sterile	*	-	-	1
Base: all who have ever been to contemporary art (n = 661)	n=661	n=276	n=98	n=285

The contemporary art experience

Motivations and barriers

People who have visited one or two exhibitions (or may do so in the future) rarely think about visiting a contemporary art exhibition and often only if prompted by others.

They feel outside the ‘committed’ group and can feel out of place or looked down on. They dislike arty jargon and the perceived pretentiousness of contemporary art audiences; contemporary art is therefore not seen as approachable or ‘for me’. They prefer *‘beautiful’, ‘pleasant to look at’, ‘uplifting’* works exhibiting *‘colour, intricacy, technical ability, surprise and fun’*. They are less interested in the *‘challenge’* of the work. Contemporary art is definitely not considered part of their repertoire of ‘normal’ leisure or entertainment activities; it is more so seen as a one-off, holiday kind of experience. ‘Infrequent’ visitors feel like outsiders. They tend to perceive the contemporary art audience as *‘arrogant’, ‘pretentious’, ‘shallow’* and *‘unapproachable’*, or as *‘wankers’* who *‘always wear black’*. That is, they are not seen to be ‘like me’.

Some ‘infrequent’ and ‘never’ visitors have quite strong preconceived ideas about contemporary art, and may be frightened by too much intellectual challenge, work that is difficult to understand, or subject matter that makes them feel *‘angry’* or *‘disgusted’*. People who have these feelings often claim to prefer art that is *‘beautiful’, ‘pleasant to look at’,* familiar or famous. This is presumably because it involves far less risk—they know what to expect, and they are not going to be disappointed.

However, these perceptions are based on some participants’ stereotypical view of contemporary art. In fact many who have seen an exhibition of some sort can talk positively about the work and were surprised they liked it. They enjoyed the colour, intricacy or technical ability of the artists, and expressed wonder, admiration and the ‘wow’ feeling of surprise at seeing an unusual or different piece of work, new ways of using materials or form, and the size and scope of some works.

Many ‘infrequent’ and ‘never’ visitors are looking for an art experience that is emotionally uplifting and inspirational, rather than challenging, heavy or intellectually involving. Some want to feel they can laugh at work they see as amusing or strange, and have fun; but they perceive they need to be serious around contemporary art.

On the other hand, ‘current’ visitors enjoy the challenge; they want to grow, challenge their views and learn more about life from contemporary art. Their experience is more enjoyable if they can be emotionally inspired and intellectually enriched. Less frequent visitors do not particularly want to own contemporary artworks. Frequent visitors, on the other hand, either already own or would like to own works as a reflection of their values and appreciation.

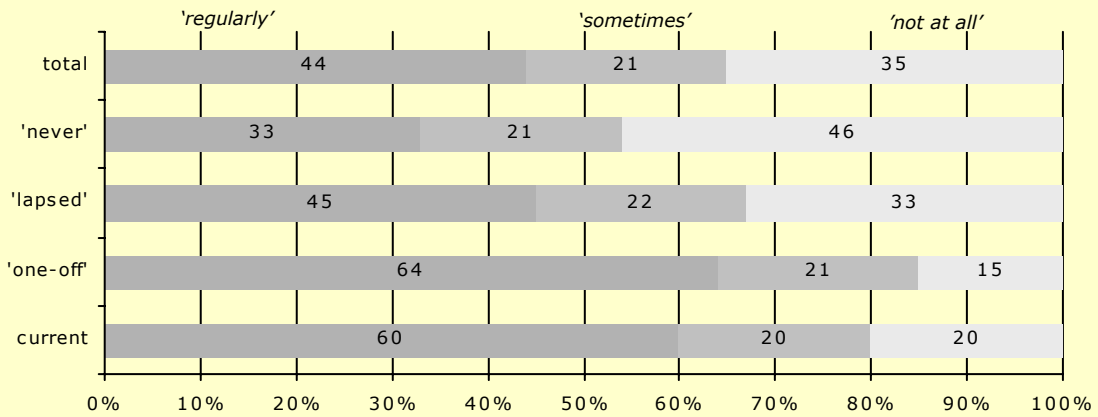
What the audience likes about contemporary art

The artist’s *creativity, skill* and thought process are the most attractive aspects of contemporary art, particularly for current visitors (62%). *Freshness, colour* and *diversity* are aspects particularly enjoyed by ‘one-off’ visitors, as are *stimulation* and *escape*. Visitors generally like the *relaxing, interesting, exciting* and *humorous* aspects of contemporary art (Chart 3.19).

What the audience dislikes about contemporary art

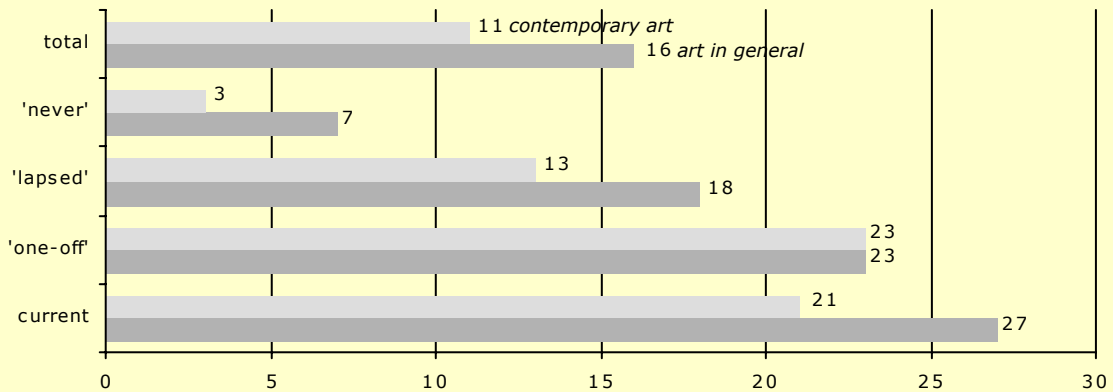
While 40% of those who have been to an exhibition cannot name anything they disliked, 60% tend to cite the ‘type and look of the work’ (*‘weird or way out’, ‘not realistic’, ‘too abstract’, ‘offensive ideas’*), rather than price, queues or the gallery. ‘One-offs’ mention these aspects more often as negatives. Seven per cent of current visitors talked about price as a barrier (Chart 3.20).

Chart 3.21: Internet usage



Base: all participants (n = 1201)

Chart 3.22: Viewing art and contemporary art online



Base: all participants (n = 1201)

Chart 3.23: Range of Internet uses

	total	'never'	'lapsed'	'one-off'	current
	%	%	%	%	%
Email	41	30	42	61	55
Research	37	27	35	57	53
Work	28	19	29	52	39
Finding out what's on	29	19	28	46	44
Education / studies	*	*	1	-	*
Entertainment / leisure	3	2	2	4	7
Shopping	1	*	3	*	2
Banking (including paying bills / trading stocks)	3	2	5	7	3
Bookings	*	-	-	-	*
News / sports results / weather	1	2	1	*	1
Job hunting	*	*	-	1	1
Chatroom	1	1	1	4	2
Other	1	*	1	3	*
Do not use Internet regularly	56	67	55	36	41

Base: all participants (n = 1201)

n=1201

n=540

n=276

n=98

n=285

How audiences find out what's on

The more involved visitors proactively seek out information, read and listen, check the Internet, and talk with peers. The telephone survey shows a high proportion of visitors use the Internet and sites like 'CitySearch' to keep up with what's on.

They also are more likely to be on mailing and email lists, and enjoy receiving alerts or information about upcoming exhibitions. They will notice brochures, leaflets and postcards, and pick them up in a variety of venues. This information contributes to their sense of belonging to a special and informed group.

The less involved claim it is very difficult to find out what's on. They are, however, not actively seeking this information, and perhaps don't see it as readily available. While they don't notice what is happening in contemporary art, they do know about movies that are showing, big concerts coming up, or one-off blockbuster exhibitions such as 'The Renoir' or 'Monet in Japan'. These are all reflected by higher impact advertising and editorial coverage in the mainstream media.

Given this lack of 'what's on' knowledge, their attendance at contemporary art exhibitions often results from suggestion by others. Females with higher levels of interest and attendance are more influential in this regard.

Internet usage

Sixty-five per cent of all visitors claim they use the Internet, with the majority (44%) using it on a regular basis. 'Committed' and 'one-off' visitors are far more likely to use the Internet regularly (60% and 64% respectively). Conversely, 'never' visitors are least likely to use the Internet on a regular basis (33%) (Chart 3.21).

Regular users were asked whether they use the Internet to view art or contemporary art online. In total, 16% view art in general online and 11% view contemporary art. Among current visitors, viewing art online rose to 27% for all art, and 21% for contemporary art. Twelve per cent of regional visitors said they viewed art online, compared to 17% of city visitors (Chart 3.22).

Regional and rural people are less likely to use the Internet regularly (36%) than city people (49%). However, current visitors from regional and rural areas are more likely than non-visitors to use the Internet, with 47% doing so 'regularly', although this is lower than for current city visitors (66%).

To further explore Internet usage, all regular users were asked how they used the Internet (see Chart 3.23). Key uses are 'email' (41%), 'research' (37%) and 'finding out what's on' (29%). This suggests that the Internet is a very relevant tool for keeping visitors informed about art and contemporary art events.








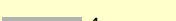
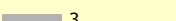
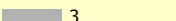
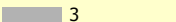
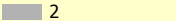
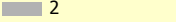
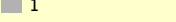
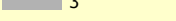

More than half (57%) the regular Internet users do not have a favourite site, and others named a wide range with no real patterns emerging. This suggests that use of particular sites for audience development would require careful planning and niche targeting.

Chart 3.24: Media usage

Media type	total %	'never' %	'lapsed' %	'one-off' %	current %
Newspapers (at least once per week):					
The Sydney Morning Herald	14	9	17	10	24
The Age	13	9	15	19	15
The Australian	10	6	11	14	17
Net tabloids	23	24	22	33	19
Art media usage (regularly):					
Read newspaper arts pages	44	27	53	48	70
Watch arts programs on TV	48	39	57	46	60
Listen to radio arts program	16	10	15	24	28
Read arts magazines	21	12	26	25	37
TV usage (average hours / week):					
Commercial TV	13	14	14	10	11
ABC / SBS	7	6	7	7	7
Radio listening (average hours / week):					
Commercial radio	11	12	11	8	8
ABC radio	7	6	7	9	8
Community radio	2	2	2	1	2
Base: all participants (n = 1201)	n=1201	n=541	n=276	n=98	n=285

Chart 3.25: Decision-making factors

Importance of each of the following factors when deciding whether to attend a particular contemporary art exhibition.

Factors	most important	%	total	'infrequent'	'committed'
			very / quite important	very / quite important	very / quite important
		%	%	%	%
Overall idea of work		22	57	55	57
Word of mouth		13	57	63	52
Entry fee		8	57	57	54
No long queues		8	65	72	55
Location		8	54	53	54
Media publicity		7	38	39	36
Exhibition's reputation		7	33	32	35
Artist's reputation		7	28	25	32
Background knowledge		4	40	38	40
The venue		3	38	45	29
Transport available		3	48	50	46
Opening times		3	56	58	53
Artist talking to audience		2	42	37	47
Shops		2	14	15	14
Cafés / restaurants		1	28	26	29
No most important factor		3	-	-	-
Base: all visitors (n = 484)			n=484	n=278	n=206

Media usage

Galleries can more strategically target publicity and advertising by looking at patterns of media usage among the different visitor groups (Chart 3.24).

Some of the patterns to emerge include:

- marginally higher readership of the major city newspapers like *The Sydney Morning Herald* (14%), *The Age* (13%) and *The Australian* (10%)
- higher readership of Internet tabloids
- high readership of the arts pages in newspapers (70%) among current visitors
- comparatively lower usage levels of radio programs and arts magazines
- nearly double commercial TV usage over the ABC and SBS
- stronger viewing of arts programs on television (60%) among current visitors.

Fewer current visitors listen to arts programs on radio (28%) or read arts magazines (37%), although these levels are higher than for the average population.

‘One-off’ visitors differ marginally in media usage. For example they are more likely to read tabloids such as the *Daily Telegraph*, but they also tend to read arts pages (48%), listen to radio arts programs (24%) and read art magazines (25%), indicating further promotional opportunities with this group.

‘Never’ and ‘lapsed’ visitors are heavier users of commercial radio and TV.

The decision-making process

What kind of issues impact on the decision to visit a contemporary art exhibition?

Visitors were asked to rate a variety of factors from a pre-selected list, and to nominate the most important factor in the decision-making process (Chart 3.25).

They were also asked about who suggested the exhibition, preferred times and days, sources of information, and the influence of reviews.

Key factors

The ‘*overall idea of the work*’ emerged as the key driver (22%), followed by ‘*word of mouth*’ (13%).

In general, a number of other factors also have a bearing on decisions, including entry fees, location, accessibility and opening times. A blockbuster or popular exhibition perceived to have long queues could also act as a deterrent.

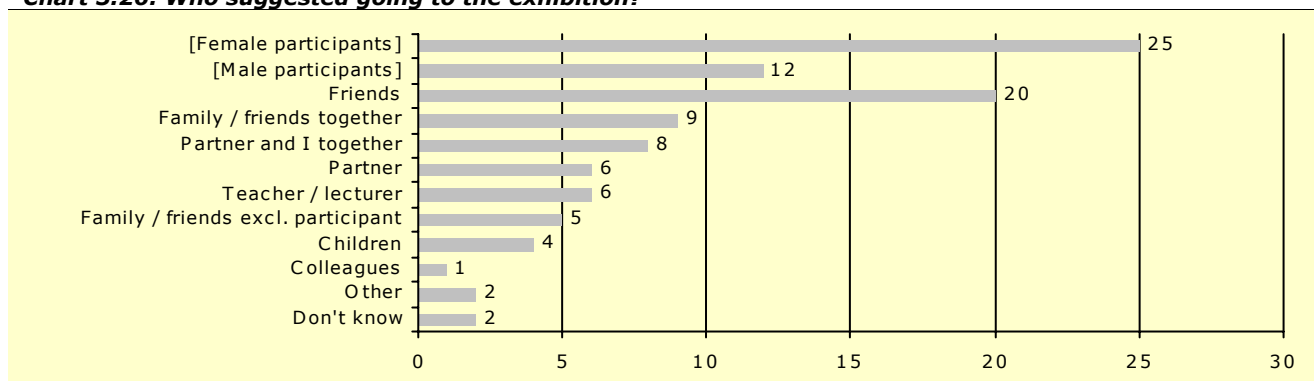
Word of mouth is more likely to be the most important factor among city (16%) than regional and rural (6%) visitors. This could be due to greater choice and competition for leisure time in the city, and more opportunity for discussion.

There were also evident differences between ‘infrequent’ and ‘committed’ visitors.

The artist’s reputation and artist talks are motivating to frequent visitors, indicating their higher level of involvement with the genre, whereas less frequent visitors rely on convenience aspects (location, opening times, transport, queues, entry fees) in their decision-making. Word of mouth is also an important consideration for less frequent visitors.

The overall idea of the work, as the most important factor, was significantly higher among ‘committed’ (27%) than ‘infrequent’ (19%) visitors (Chart 3.25).

Chart 3.26: Who suggested going to the exhibition?



Base: all who did not attend alone (n = 392)

Chart 3.27: Preferred day

Preferred day	total	'infrequent'	'committed'
	%	%	%
Net week day	28	20	38
Monday	2	1	3
Tuesday	2	2	1
Wednesday	6	5	7
Thursday	1	*	3
Friday	7	6	8
Any	10	6	16
Net weekend	56	64	46
Saturday	15	17	11
Sunday	17	20	14
Either	24	27	21
Opening day	*	-	1
No preference	16	16	16

Base: all visitors (n = 484)

n=484

n=278

n=206

Chart 3.28: Preferred time

Time of day	WEEKDAY			WEEKEND		
	total	'infrequent'	'committed'	total	'infrequent'	'committed'
	%	%	%	%	%	%
Morning (10am-12pm)	27	32	24	24	31	13
Lunchtime (12-2pm)	16	18	14	21	17	27
Afternoon (2-5pm)	25	31	20	20	50	50
Early evening (5-7pm)	13	7	17	3	3	4
Late evening (after 7pm)	10	5	13	1	1	2
Opening (Day / night)	2	2	-	-	-	-
No preference	8	3	12	1	-	4

Base: all visitors (n = 484)

n=484

n=278

n=206

n=484

n=278

n=206

Chart 3.29: Sources of information about the exhibition

Nominated source of information	total	'infrequent'	'committed'
	%	%	%
Word of mouth	38	37	38
Newspaper advertising	26	27	26
Just saw it / saw a sign for it	19	20	17
Publicity mailed to me	17	12	22
Newspaper articles / reviews	16	18	14
Billboards / posters	15	16	14
Brochure I picked up	15	18	11
Radio	7	8	6
Television advertising	6	6	6
Television interview or feature	5	6	4
Art magazines	5	3	7
Website	4	3	6
General magazines	3	2	5
Teacher / school	2	2	1
Advertised at work	*	*	1
Didn't look for information	6	9	3
Other	2	2	2

Base: all visitors (n = 484)

n=484

n=278

n=206

Who suggested the exhibition

Partners and friends (particularly females) can have a strong influence on attendance. Around half of those who attended an exhibition with other people (82%) had made the suggestion. That is, 37% indicated they had suggested the exhibition themselves, while a further 17% went with a partner, family member or friend. The rest say they rely on others to propose visiting an exhibition, particularly friends (Chart 3.26).

Females are more likely to instigate the visit than males, as are people with a high frequency of visiting contemporary art exhibitions.

Regional and rural people were more likely than city people to attend a contemporary art exhibition with family and children.

Preferred day and time

When asked which day of the week they would ideally attend a contemporary art exhibition, 56% of visitors nominated the weekend, 28% a weekday, while 16% had no preference (Chart 3.27).

The strongest weekend preference was among 'infrequent' visitors (64%), and regional and rural visitors (64%). Saturday and Sunday were equally preferred.

Weekdays, on the other hand, were more attractive to 'committed' visitors (58%) and those over 55, who may have more time available during the week (36%). Wednesday and Friday were nominated as the most preferable weekdays.

No single preferred time of day emerged, although there was a skew towards the daytime hours of 10am to 5pm, particularly for 'infrequent' visitors (Chart 3.28). There was some preference, among the 'committed' visitors, for extended weekday opening hours into the late afternoon and evening.

On weekends, preferences for opening hours were particularly concentrated in the morning, lunchtime and afternoon timeslots, with almost no demand for opening hours beyond 5pm.

Very few claim to prefer visiting exhibitions solely at openings.

Sources of information

Word of mouth was the most frequently cited source of information for contemporary art exhibitions among all visitors (Chart 3.29), and particularly for males (45%) and 18–29 year olds (49%). Newspaper advertising was next most commonly mentioned source (26%), followed by signage and direct mail.

'Committed' visitors were more likely to source information from direct mail, art magazines and websites. They were more proactive in seeking out what's on, and often subscribed to direct mail or email lists with a range of galleries.

'Infrequent' visitors, on the other hand, were slightly more likely to use newspaper reviews and brochures.

Newspaper articles and reviews were a stronger source of information than word of mouth for regional and rural visitors. Twenty-four per cent of regional and rural visitors used newspapers as an information source, compared to 13% of city visitors.

Younger visitors more frequently mentioned brochures as an information source, indicating its necessity in the mix of marketing materials.

Influence of reviews

Reviews did appear to have an impact for more than half the contemporary art visitors, and particularly for less frequent visitors.

Overall, a majority of visitors said they read exhibition reviews. This was highest among 'committed' visitors (66%), who claimed they were less influenced by reviews, with around half (48%) suggesting that reviews did not have much of an influence, and for 10%, no influence at all.

Although 48% of 'infrequent' visitors read reviews, 63% indicated they were strongly influenced by what they read.

City-based people (59%) were also more likely to read reviews than those in regional and rural areas (49%).

Chart 3.30: Nature of visit

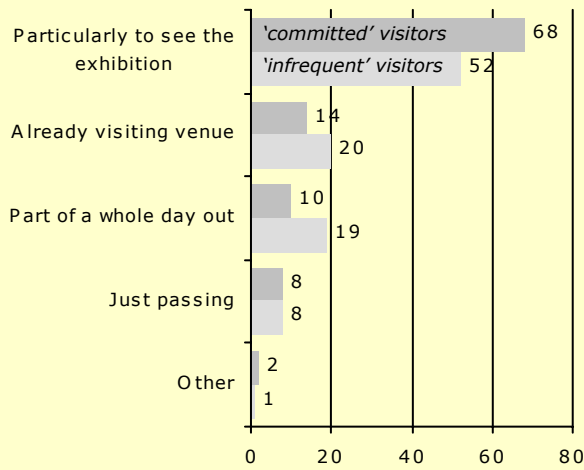
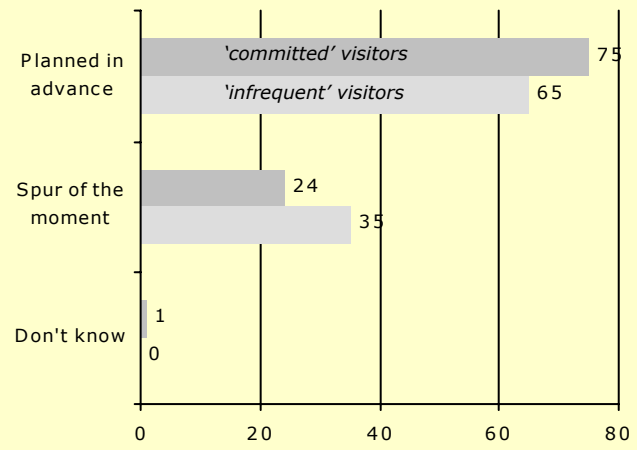
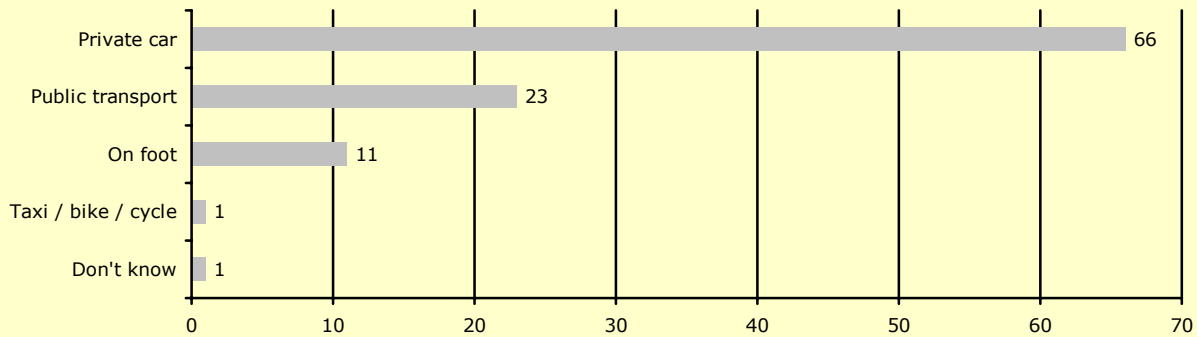


Chart 3.31: Planning of visit



Base: all visitors (sum of 'committed' and 'infrequent' visitors) (n = 484)

Chart 3.32: Form of transport used



Base: all visitors (n = 484)

Chart 3.33: Attendance companions

Companions, friends and family (including children) who accompanied the visitor on their last contemporary art exhibition visit.

Companion(s)	total	'infrequent'	'committed'
	%	%	%
With partner / spouse only	20	24	15
On my own	18	14	24
With a friend	17	17	16
With a group of friends	14	14	15
With close family (partner / children)	11	13	7
With family and friends	7	6	8
With child / children only	7	7	6
With family-older relatives (over 35, eg. parents)	6	5	6
Teacher / school / students	4	4	5
With family-younger relatives (less than 35, eg. brother, sister, cousins)	2	3	2
With work colleagues	1	1	2
Other	*	*	-
Don't know / can't remember	*	*	-

Base: all visitors (n = 484)

n=484

n=278

n=206

Current visitors talk about their most recent visit to an exhibition

Planning the visit

Three out of ten visitors said their last visit was a spur of the moment decision. This was slightly higher among 'infrequent' visitors (Chart 3.31).

Most had gone specifically to see the exhibition (59%), while others said they were already visiting the venue, and had looked at the exhibition out of interest (18%). Not surprisingly, 'committed' visitors were more likely to have decidedly visited the exhibition (Chart 3.30).

'Infrequent' visitors are a little more likely to go as an extension of a visit to another part of the venue, or on the spur of the moment, highlighting the importance of signage and cross-promotional materials at exhibition venues.

Transport used and distance travelled

A car was the most frequently used transport to the exhibition (66%), with relatively few using public transport (23%), demonstrating the need for parking facilities at or near venues. Incidence of using a car was higher in country areas (82%), and among people with children (76%) (Chart 3.32).

Four out of five visitors had seen their last contemporary art exhibition in their home town or city. This was highest among 18–29 year olds (85%).

One in five visitors had been to a venue in another city or town. Not surprisingly, those in country areas were significantly more likely to have attended the exhibition away from their residential area. One third of regional and rural people (37%) had travelled to another city or town to see the last exhibition they'd attended.

Visitors over 40 years of age were also more likely to have travelled to another town or city for the exhibition.

On average, those who went to a venue in their home town or city had travelled around 19kms or approximately 28 minutes to get there. Regional and rural people travel far greater distances to see an exhibition (on average, around one hour).

Who else visited with you?

Most people attending their last contemporary art exhibition went with at least one other person. 'Infrequent' visitors were most likely to attend with others, particularly a partner or other close family member (Chart 3.33).

'Committed' visitors were more likely to have gone to their last exhibition on their own, with many (24%) opting to go alone. Demographically, older visitors were also more likely to have gone on their own.

Current visitors generally know others interested in going to an exhibition. Some also consider they may fully appreciate an exhibition on their own. Others may go jointly (to an opening, for example) and then return alone to spend more time.

Regional and rural visitors are more likely than city people to attend an exhibition with others, such as family and children.

Chart 3.34: Venue of last exhibition attended

Venue	total	'infrequent'	'committed'
	%	%	%
Large public gallery	31	33	27
Small public gallery	15	15	15
Small commercial gallery	13	10	19
Community centre	10	10	10
Museum	8	7	9
Exhibition / convention centre	5	7	3
Outdoor	7	6	7
Large commercial gallery	2	2	2
University	3	4	3
Shopping centre	1	2	1
Office / hotel foyer	1	1	-
Winery / vineyard	1	1	-
Other	2	2	2
Don't know / can't remember	3	3	2

Base: all contemporary art visitors (n=484) n=484 n=278 n=206

Chart 3.35: Location of last exhibition attended

Location of venue	total	'infrequent'	'committed'
	%	%	%
CBD	48	51	45
Inner city	21	20	22
Regional centre / town	13	9	18
Suburban area	12	12	12
Outer metropolitan	3	4	2
In country	*	1	-
Other	1	1	1
Don't know / can't remember	1	2	*

Base: all contemporary art visitors (n=484) n=484 n=278 n=206

Chart 3.36: Locale of last exhibition attended

Locale of exhibition	City	Regional and rural
	%	%
Home city or town	84	63
Another city or town	16	37

Base: all contemporary art visitors (n=484) n=324 n=161

Venues and location

A majority had attended contemporary art exhibitions at a *large public, smaller public, or commercial gallery* (Chart 3.34). After galleries, the next most frequently mentioned venue is *community centres*, which record slightly higher attendances among blue collar (15%) than white collar (9%) visitors.

People in different demographic groups may display different location preferences: 18–29 year olds are more likely to go to a venue in the CBD (56%), while 40–54 year olds are more likely to go to venues in regional centres (20%) (Chart 3.35).

Current ('committed' and 'infrequent') visitors have acquired knowledge of locations and venues and find them easily accessible. Less frequent ('lapsed', 'one-off', 'never') visitors are not familiar with many venues or locations, apart from major museums and galleries. Even if they are aware, they are unclear about aspects like opening hours; this limits the degree to which attendance can be a spur of the moment decision. For example, in one regional area everyone knew of the one gallery and its location in the centre of town, but few non-visitors realised it was open on a Sunday—the preferred day. Similarly, it is often not expected that galleries will be open through the evening.

Lack of accessibility is a consideration in regional areas, despite the relatively equal attendance levels. People from regional and rural areas (45%) felt there were '*not enough*' contemporary art exhibitions in their own area, compared to city people (33%). They agreed (55%) that '*it is too hard to get to contemporary art exhibitions from where we / I live*', compared with city people (only 19%) (Chart 3.36).

People from other cultural backgrounds (particularly European) know least about what's on, despite a higher than average interest in supporting new artists.

Less frequent visitors may have a different experience

Past experiences had soured some 'one-off' and 'lapsed' visitors from attending more often. However, these same negative aspects were perceived as positives by 'committed' and even 'infrequent' visitors.

For example, current visitors were generally happy with the spaces they visited and their quiet, contemporary layout. Some less frequent visitors would have preferred a more comfortable ambience. They talked about '*hearing my steps echoing*' or the '*unfriendly feeling*' of '*silent*' and '*staring*' security guards, or a '*cold*' atmosphere.

Less frequent visitors also preferred exhibitions showing a variety of artists to minimise the possibility of intensely disliking one artist's approach, and wasting time with the visit. More frequent visitors are happy to see a solo exhibition and risk not liking it.

Other venue issues that 'infrequent' visitors suggested could encourage them included convenient parking facilities, weekend and Sunday openings, and for those with children, some sort of crèche or other children's facility:

'IKEA have a crèche with an inflatable castle for the kids—why can't galleries?'

Lifestyle barriers can reduce the number of visits

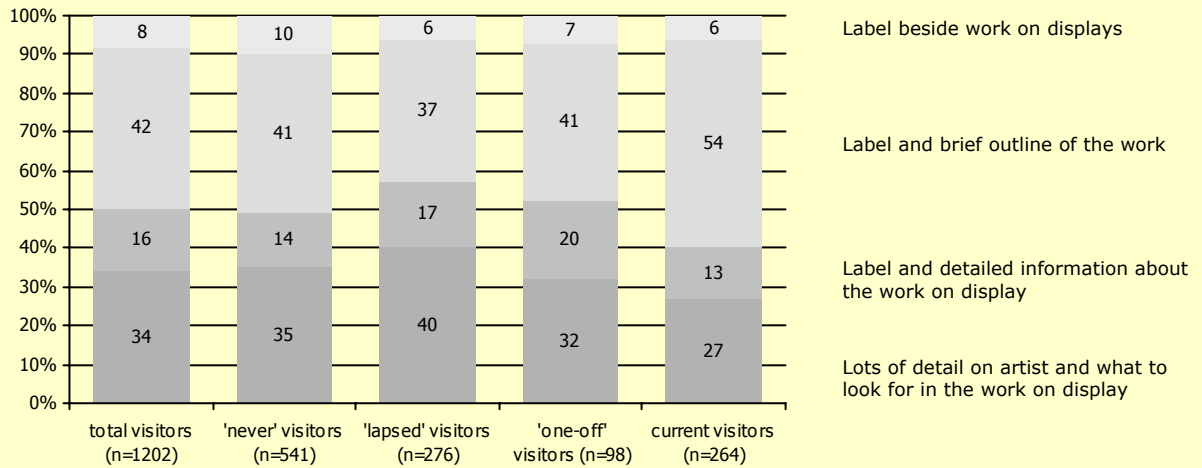
The survey shows it is more difficult for older people and people with young children to attend contemporary and other forms of visual art. Those with young children or teens only seem to attend if their children are doing art at school. Otherwise they tend to be time-limited and often prefer to spend spare time in family pursuits. They don't regard visiting contemporary art or other exhibitions as family entertainment.

Outdoor activities are very important to this group, and the indoor nature of galleries and museums tends to limit consideration to times like wet, cold days. This group is more likely to have enjoyed outdoor art and sculpture exhibitions or 'market' forms of exhibitions. They are concerned that children will be too easily bored in galleries, unless there are interactive or child-related exhibits.

Overall, few regard the actual cost of entry a barrier, provided it is a small entry fee. However, for families in particular, the total costs associated with the outing (travel, parking, food and drink, babysitting, etc.) are taken into account. This discourages choice over more easily accessible and predictably enjoyable outings such as the beach or a picnic.

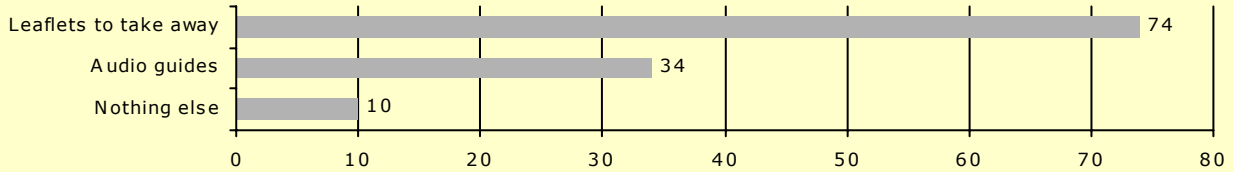
Chart 3.37: Information about the work desired in an exhibition

Survey participants were asked to nominate (from four options) their preference for information about the works in an exhibition.



Base: all participants (n = 1202)

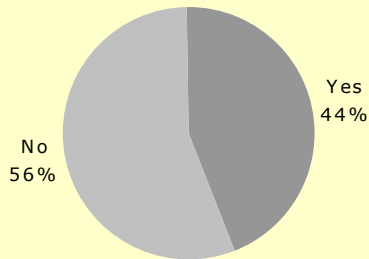
Chart 3.38: Other information desired at the exhibition



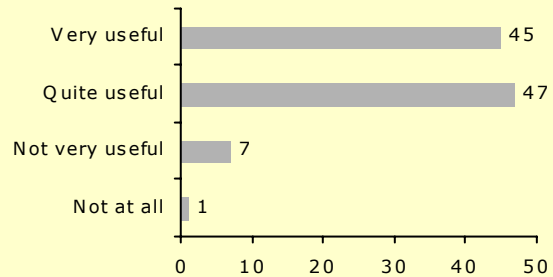
Base: all participants (n = 1202)

Chart 3.39: Usage of catalogue or programs

Did you use a catalogue or program?



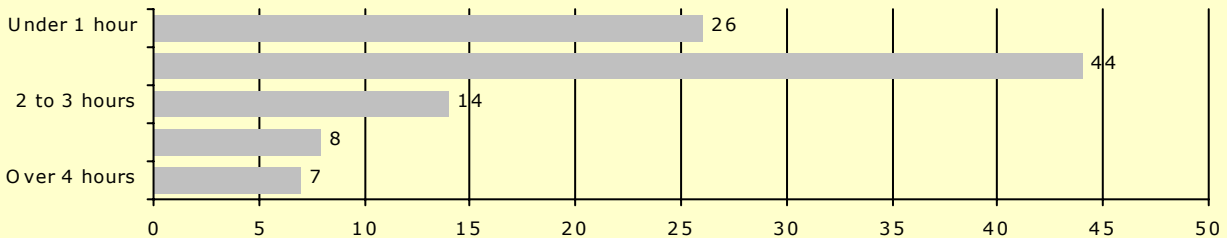
How useful was it?



Base: all visitors (n = 484)

Chart 3.40: Time spent at the exhibition

Approximately how long did you spend at this contemporary art exhibition overall (from entry to venue until you left)?



The average time spent at this exhibition was around 1 hour 50 minutes. Regional and rural people spent on average over 2 hours.

Base: all visitors (n = 484)

Interpreting the work

Face-to-face interviews indicated many non-visitors to contemporary art claim they don't understand the work or what the artist is trying to do.

Some care must be taken about the degree to which building 'knowledge' from an intellectual perspective increases involvement. People tend to look for help in building emotional enthusiasm for the work before exploring their 'understanding' of it.

Some mentioned the value of a friend who could help interpret the work, or an opportunity to meet the artists who could explain their ideas.

In the absence of personalised interpretation, a high proportion (74%) indicated an interest in 'leaflets to take away', and around a third mentioned they would like an audio guide (Chart 3.38). Comments about the content of interpretive aids indicate that jargon or intellectual 'artspeak' will reinforce feelings of alienation and turn a potentially enjoyable experience into hard work.

'Current' visitors prefer brief outlines displayed next to the work, whereas 'lapsed' and to some degree 'never' visitors want more detail about the work and the artist, and guidance on what to look for (Chart 3.37). Face-to-face interviews suggested that people could better absorb information through a personal or audio guide.

Regional and rural visitors prefer more detailed wall-mounted descriptions of the work.

Usage of catalogue or program

Incidence of using a catalogue or program was highest among visitors aged 55+ years (61%) compared to all visitors (44%). 'Committed' visitors were only marginally more likely to use a catalogue or program than 'infrequent' visitors. Catalogues were thought to be 'useful' or even 'very' useful (45%).

Regional and rural visitors tend to make more use of catalogues (60% 'very useful') compared to city people (38% 'very useful') (Chart 3.39).

Use of the café or restaurant

A total of 33% of visitors used the café or restaurant on their last visit, with café consumers more likely to be females over 40 with children. In 10% of cases visitors said there was no café or restaurant.

Time spent at exhibition

Most visitors estimated they had spent more than one hour at their last contemporary art exhibition, with 7% estimating they had spent more than four hours (Chart 3.40).

One to two hours tended to be the average length of time spent at the exhibition (44%). Attendance frequency or demographic differences didn't impact on time spent at an exhibition.

But there were geographical impacts. People living in regional and rural areas tended to spend more time at the exhibition (on average, around two hours), possibly due to longer travelling distances.

Some visitors like to spread opportunities for enjoyment

Across the opposing views of 'committed', 'infrequent' and 'one-off' visitors, there are a number of people who are not deterred by the concept of contemporary art. They may have been to two or three exhibitions in the past couple of years, but are not very engaged or involved with contemporary art and *'can take it or leave it'*. Many have been influenced to attend by partners or friends, or simply feel they should keep up with and know a little about what is happening. Such visitors place more emphasis on an integrated experience of location, ease and other facilities (café, bookshop). They prefer to attend exhibitions where they can spread the opportunity for enjoyment by doing something else as well: have a meal, walk in the park, look at another attraction.

- ◆ *'I like to meet my sister and catch up on her news—we can spend a bit of time at the gallery and then have lunch and chat.'*
- ◆ *'We go to a restaurant that shows contemporary art as well—that way if you don't like the art you can at least have a meal.'*

Chart 3.41: Indigenous art audience profile

Demographic information		Survey total	Visitors to Indigenous art
		%	%
Gender	Male	49	41
	Female	51	59
Age	18–29	23	24
	30–39	20	18
	40–54	28	36
	55+	30	23
Area	Country	36	32
	City	64	68
Education	Primary / Part secondary	20	14
	HSC / equivalent	20	18
	Tertiary	36	41
	TAFE / Tech	19	21
Work status	Yes	58	62
	No	42	38
Have children	Under 5 years	13	11
	5-17 years	24	30
	18+ years	21	21
	Left home	26	24
	No children	36	34
Household income	\$40k and under	46	36
	\$41k–\$70k	25	25
	\$71k+	18	26
	Refused	10	13
Occupational status	Blue collar	33	30
	White collar	64	67
Where audience lives	City	64	68
	Country	36	32
Country of birth	Australia / NZ	78	80
	UK	10	11
	Europe	4	2
	Other	8	7
Art involvement	Artist / designer	7	11
	Hobby	27	37
	Creative industry	8	-
History of art involvement	Parents encouraged interest in art / craft	14	19
	Partner / friends introduced me to art / craft	27	33
	School encouraged interest	32	33
	I like to be creative	37	45
	Art and cultural activities have always been part of my life	34	47

Base: all participants (n = 1201)

n=1201

n=317

Chart 3.42: Attitudes to Indigenous art compared to contemporary art

Attitude statements	Survey total	Current visitors	Visitors to Indigenous art
(totals of those who strongly / slightly agree)	%	%	%
I like art that shows aspects of different cultures	87	94	91
Indigenous art is really interesting	75	81	91
Indigenous art is an integral part of our culture	85	87	90

Base: all participants (n=1201)

n=1201

n=285

n=317

Contemporary Indigenous art

During the initial research it became clear that audiences did not particularly view Indigenous art as 'contemporary art'. It was also evident that Indigenous art attracts different audiences. To provide some input, we separated Indigenous art in the telephone survey and face-to-face interviews, using the definition in the **Glossary**. The research team measured attendances and profiles, and some attitudes.

Audience profile

In total, 26% of people had visited an Indigenous art exhibition in the past 2 years, and among contemporary art visitors this proportion rose to 51%. Indigenous art visitors were similar in profile to contemporary art visitors.

However, Indigenous art attracts a higher proportion of people with school-aged children and a more family oriented base, and who are slightly older (40-54 years). They are less likely than contemporary art visitors to have parents born in the UK or in Europe.

Indigenous art visitors are more likely to be:

- female (59%)
- living in an urban environment (68%)
- tertiary educated (41%)
- working (62%)
- parents with school aged children, 5 to 17 yrs (30%)
- white collar with higher household incomes
- involved in art as a hobby (37%) or as a practitioner (11%).

Indigenous art visitors are more likely to claim that:

- ◆ *'artistic and cultural activities have always been part of my life'* (47% compared to 34% overall)
- ◆ *'I go to art classes / like to be creative myself'* (45% compared to 37% overall)
- ◆ *'I like art that shows aspects of different cultures'* (91% compared to 87% overall).

They are more likely than contemporary art visitors to claim that:

- ◆ *'Indigenous art is really interesting'* (91% compared to 81% of contemporary art visitors and 74% overall)
- ◆ *'Indigenous art is an integral part of our culture'* (90% compared to 87% of contemporary art visitors and 85% overall).

They are also more likely to have been introduced to art by partners, friends or parental encouragement.

Charts 3.41 and 3.42 compare visitors to Indigenous art exhibitions with all people surveyed.

Chart 3.43: What visitors like about Indigenous art

Visitors to Indigenous art like:	%	Visitors to Indigenous art like:	%
Art itself	67	Culture / stories	46
Colours used	28	Stories behind paintings	20
Variety / all different	19	Traditional culture	19
Material used	13	Outback imagery	6
Patterns / design	7	Symbolic nature of paintings	3
Use of dots	7	Overall imagery of paintings	3
Paintings	6	Different style from different groups	1
Like it all	4	Emotional	11
Natural painting	3	Educational	5
Boomerang / didgeridoo	3	Interesting	4
Time and effort put in	3	History / Australia	9
Techniques used	2	The Australian history	8
Craft	2	It's Australian	1
Music	2	Others	12
Sculptures	2	None	6
Visual effect	1		
<i>Base: all visitors to Indigenous art (n = 335)</i>		<i>Base: all visitors to Indigenous art (n = 335)</i>	
<i>n=317</i>		<i>n=317</i>	

Chart 3.44: What visitors dislike about Indigenous art

Visitors to Indigenous art dislike:	%	Visitors to Indigenous art dislike:	%
Art itself	22	Not enough around	3
Repetitive / all the same	9	Needs more exposure	2
Too expensive	4	Culture fakes / exploitation	11
Just dots and patterns	3	Exploitation of Indigenous people	7
Colours	2	Fake Aboriginals	3
Not my type	2	Political statement	2
Basic / simplistic	1	Emotional	4
Violent scenes	1	Boring	3
Traditional Indigenous art	1	Lacking skill / talent	1
Contemporary / modern	1	Other	4
Lack of it / information / advertising	11	None	56
Not enough explanations	7		
<i>Base: all visitors to Indigenous art (n = 335)</i>		<i>Base: all visitors to Indigenous art (n = 335)</i>	
<i>n=317</i>		<i>n=317</i>	

Indigenous likes and dislikes

- 67% liked the ‘art itself’—colours, variety, materials, patterns or designs, use of dots
- 46% responded to the Indigenous culture or stories behind each work. They were interested in the stories behind the paintings (20%) and the traditional culture (19%)
- 9% valued its links to Australian history
- 11% responded to its ‘educational’ or ‘interesting’ aspects (Chart 3.43).

Although 56% of Indigenous art visitors were unable to mention anything they dislike about Indigenous art, the strongest dislike was again related to the work itself—the feeling that it was repetitive or all the same (9%), its use of dots and patterns (3%) or colours (2%). There were also a few mentions of high prices (4%).

Another criticism of Indigenous art was inadequate ‘explanations’ (7%) as well as there not being enough of it around (5%). There was also some agreement with ‘*exploitation of Aboriginals*’ (7%) and ‘*fake Aboriginals*’ (3%), although this was mentioned only at a very low level (Chart 3.44).

Apart from the visual aspects of Indigenous art, its primary appeal is the communication of cultural issues and history. The main barrier to more frequent attendance is a perceived repetitiveness and similarity in some of the work, primarily among those who are not aware of or involved with the cultural aspect or the breadth of work available. Non-visitors often base their perceptions on what they see in tourist galleries and shops.

Prior knowledge is important

Face-to-face interviews suggested that the most enthusiastic consumers of Indigenous art understood and knew more about its background, and its ability to communicate and expand on Indigenous culture and life. They tended to view the art in its complex cultural context. In some cases the underlying ‘story’ was important to those interested in Australian heritage and Indigenous values.

There was a tendency, however, among the broader population to categorise Indigenous art as variations of ‘dot painting’ and of limited interest. There was little widespread knowledge about specific artists, the variety of work or directions in Indigenous art, except among a small group of enthusiasts. This suggests a need to build awareness of artists and regional differences in style and imagery.

Indigenous art is educational

Many people, and particularly those with children, value the educational context of Aboriginal art. They commented that wall-mounted information about the work’s intention and meaning strengthens their interest and involvement.

Stereotypes and suspicions

Indigenous work was less likely to be the focus of a specific visit; it was more often viewed as a part of a visit to a larger gallery collection. There was also a perception that it is often ‘for sale’ and therefore possibly directed towards tourists. This emphasis on sale over exhibition of Indigenous art had also led to some suspicion, although at a relatively low level, of non-Indigenous artists copying stereotyped Indigenous art styles to capitalise on the tourist market.

Along the same lines, but also at a low level, was a perception that unscrupulous art dealers were exploiting some Indigenous artists and profiting from their works.