

Data collection & research design

Chart 4.1: Initial face-to-face interviews

Visitor status	Male		Female	
	Under 45 years	Over 45 years	Under 45 years	Over 45 years
Frequent CAC* visitor	1	-	-	1
Infrequent CAC* visitor	1	1	1	1
Non-visitor	-	1	1	-

Base: n = 8

* CAC = Contemporary art and / or craft

Chart 4.2: Follow up in-depth interviews

Area	Visitor status	Sex / age
Sydney	'potential' visitor	Female 50+
	'committed' visitor	Male 18-34
Brisbane	'potential' visitor	Female 50+
	'potential' visitor	Female 25-55
Townsville	'infrequent' visitor	Female 18-34
	'infrequent' visitor	Female 25-55

Base: all intensive interviewees

'committed' visitors had been to a contemporary art and craft exhibition at least four times in the past two years.

'infrequent' visitors had been to a contemporary art and craft exhibition 2-3 times in the past two years.

'potential' visitors had not been to a contemporary art and craft exhibition, but did not reject the idea of going.

Chart 4.3: Group discussions

Visitor status	Male		Female	
	18-34	25-55	18-34	25-55
'committed' CAC* visitor	-	1	1	-
'infrequent' CAC* visitor	1	1	-	2
Non-visitor	-	1	-	1

Base: all participants (n = 8)

* CAC = contemporary art and / or craft

Chart 4.4: Distribution of telephone interviews by geographic area

Area	Total number	Capital city	Regional and rural
		%	%
New South Wales	181	64	36
Victoria	182	74	26
Queensland	179	46	54
South Australia	180	74	26
Western Australia	180	74	26
ACT	100	-	-
Tasmania	100	42	58
Northern Territory	99	48	52

Base: all participants (n = 1201)

n=1201

n=789

n=412

Woolcott Research conducted the audience study.

Data collection & research design

The information and survey data were collected in various ways, including a literature review, a survey by a self-completion questionnaire of contemporary art and craft spaces, and nationwide audience research through face-to-face and telephone interviews.

The research team also consulted with a Reference Panel comprising seven curators and managers from the visual arts and craft sector (listed on page 80), in particular about key terms and questionnaire coverage.

Morris Hargreaves, a UK consultancy specialising in the cultural sector and particularly the visual arts, was also asked to assist. They provided commentary to the study, and details of similar projects they had been involved with.

Notes to charts

Values are expressed in tabular charts as ‘-’ for a zero value, and ‘*’ for a value less than one. Some tabular charts have highlighted cells to indicate that they have been discussed in the discursive text (usually on the page opposite the chart).

Audience study

Qualitative phase

The face-to-face research had three purposes:

- to identify issues and provide input for the design of the questionnaire to be used in the audience study
- to explore some of the emotive aspects of the contemporary visual art and craft experience, and what drives these attitudes
- to gain understanding of the emotional and rational motivators and barriers to attendance at visual art and craft exhibitions.

Initial qualitative exploration

The initial qualitative exploration consisted of eight face-to-face interviews as shown in Chart 4.1 opposite.

Follow up research

More qualitative research was undertaken as a follow up to the telephone survey, to further help in interpretation. This phase consisted of:

- eight mini group discussions (Chart 4.3)
- six face-to-face in-depth interviews.

To provide a variety of environments, these covered two cities (Sydney and Brisbane) and two regional areas (Wagga Wagga and Townsville) as in Chart 4.2 opposite.

Quantitative Survey

The quantitative stage was a national telephone survey of a random sample of 1201 participants aged 18 years and over. Its purpose was to provide a profile of audiences and potential audiences demographically and psychographically.

A boost of 200 additional visitors to contemporary art and craft exhibitions ensured a reliable base for identifying current visitor characteristics, needs and behaviours. In total 484 interviews were conducted among ‘current visitors’—defined as having been to a contemporary art and craft exhibition at least twice in the past two years—about their attendance. The interviews were split by area, with total findings post-weighted by population size to provide a national overview.

The interviews were split by area as shown in Chart 4.4, with the total findings post-weighted by population size to provide a national overview.

Chart 4.5: Gallery response to the survey questionnaire

Category	No. sent out	No. received
Contemporary art spaces	16	10
Craft organisations and galleries	8	7
Artist-run spaces	19	9
National, state and regional galleries	85	38
University galleries	20	13
Festivals, biennales, recurrent events	15	7
Indigenous organisations and galleries	11	7
Mixed venues	23	10
Other	25	0
Total	222	101

Base: all participants (n = 101)

Gallery survey

Brief

As part of this research project, the Australia Council commissioned an audit of audience-related services provided by galleries covering:

- contemporary art spaces
- contemporary art programs of state museums and galleries
- regional art galleries
- artist run initiatives
- recurrent events—biennales and festival visual art programs
- Indigenous organisations and galleries
- new media
- craft.

Timing

The Australia Council formally engaged the consultants in June 2001 and the first meeting of the Reference Panel to discuss the gallery questionnaire was held on July 12. Galleries were given until 12 August 2001 to complete the questionnaire.

Methodology

The gallery survey, conducted nationally, is based on distribution of self-completion questionnaires to subsidised visual arts and craft organisations with an exhibition program.

All galleries surveyed are subsidised by government grants or funded by educational institutions, except four galleries specialising in Indigenous art.

The questionnaire sought information about the gallery or organisation's:

- location, facilities and opening hours
- nature of collections and exhibitions presented
- public programs supporting the exhibitions
- marketing resources
- attendances and income
- publicity and promotional activities.

The Australia Council provided 99 contemporary visual arts and craft contacts. The team expanded this database to a total of 222 contacts, largely through the addition of regional galleries.

The team followed up recipients with telephone and email reminders to maximise the response rate. A total of 101 questionnaires in all were processed, as per Chart 4.5 opposite.

The response from contemporary art spaces and craft galleries was higher (79%) than regional, state and national galleries (47%). Of the 99 contacts provided by the Australia Council, 55 responses were received—a response rate of 56%. Of the full database of 222 contacts, 105 responses were received—a response rate of 47%. Four questionnaires were received too late to be included in the data, bringing the total of galleries surveyed to 101.

The gallery CEO completed more than half the questionnaires. Administrative staff completed around 10% and curatorial or artistic staff a third. Eighty-four per cent completed the questionnaire on behalf of their own gallery and 6% on behalf of another's gallery. Six per cent did not answer this question.

Questionnaires were also sent to 42 commercial galleries for some additional information, with 14 returned. However, as commercial galleries were not part of the original terms of reference, their responses were not included in this research analysis.

Literature review

The purpose of the literature review was to collate and contextualise recent research on audiences for contemporary visual arts and craft. It ensured any relevant findings or methods from local and international research were utilised, and particularly, it identified specific issues and queries for incorporating in the qualitative and quantitative design of this research.

Information on visual arts and craft audiences and related marketing issues was sourced in three ways:

- existing knowledge (and libraries) of the research team and Australia Council
- experience and library data of Morris Hargreaves McIntyre in the UK
- visual arts and craft organisations participating in the gallery survey.

There were some constraints to the literature review that should be acknowledged. First, many previous surveys are confidential to the commissioning organisations—in some cases there were sensitivities about sharing this data. Second, strategic and macro studies (ABS attendance surveys, Sweeney Reports) have not been included. While these help to quantify attendance, they don't provide any detailed profiling of the visual arts audience, nor do they specifically target contemporary art audiences.

Some relevant findings from the literature review are detailed below.

International audience research

Morris Hargreaves McIntyre (MHM), London

MHM, a UK consultancy to the cultural sector, provided a bibliography of publications and articles on the visual arts. Many of these focus on economic factors, partly because MHM have been engaged in a number of studies (from the early 1990s onwards) on selling the visual arts, and have also authored publications in this field.

There have been no UK national or regional studies profiling the visual arts (or contemporary visual arts) audience in recent years. However, MHM (and other consultants) have undertaken market research with individual galleries and visual arts organisations.

MHM provided a distillation of 'what we have learned about the market for contemporary visual arts', based on their research experience during the last few years. Their summary provides an attendance profile, and an analysis of the motivations for attendance, leading to a model 'hierarchy of visitor needs'. Barriers to attendance are also summarised, and using the Diffusion of Innovation Model, the market is segmented by the readiness of individuals to take up new ideas.

The MHM summary concludes by commenting on the implications for exhibition spaces that wish to extend their audience:

Historically many art galleries have only really catered for the inner-directed, risk-taker, innovator, early adopter-type of visitors, being the most similar in characteristics to artists and curators. Galleries have worked on the assumption that visitors are already well informed and confident in the gallery environment, are proactive and committed in their attendance. Research reveals that there are wide variations in degree of commitment, confidence and understanding represented within the gallery market, and a gallery that is really committed to audience development should address this diversity if people's needs are to be met.

Finally, MHM also provided notes on research into audience development targeted at socially disenfranchised groups. This comprises a listing of projects, in both the performing and visual arts, addressing social inclusion. While this may be useful for individual galleries to review when considering new initiatives, it hasn't been included in this publication as it doesn't directly relate to the issue of profiling the market.

Eileen Hooper, *Museums and their visitors*, Greenhill, 1994. ISBN 0415068576

This book 'aims to help museums and galleries in this crucial task of becoming more knowledgeable about the needs of visitors'.

It analyses museum and gallery visitors (students, higher socio-economic groups and educated females). Interestingly, it predicts there will be a growth in attendance from 40-59 year olds who are still active and energetic, less child focused and with more disposable time and money.

Motivations and barriers were very museum specific. Motivations cited were an *interest in display* and *entertainment* or *part of a holiday*. Barriers cited were *time constraints*, a perception that museums are for 'educated', 'arty' people or those with special interests, and a fear of appearing ignorant at exhibitions.

This book also reports on qualitative audience research, and highlights the problem of orientation for some people; feeling lost, nervous and frightened to make any noise. Similar findings emerged in MHM's work.

Museums need to balance security and information needs, and better utilise staff to assist audiences.

The importance of exhibitions that enable parents to explain themes to children was also mentioned, as was the need of children for physical expression within exhibitions.

Using research to develop a strategic plan for the arts in London, Greater London Arts, ESOMAR (founded as The European Society for Opinion and Marketing Research, now World Association of Opinion and Marketing Research Professionals), London, 1990.

This study profiled Londoners' use of the arts and identified barriers, which included problems with transportation and safety, perception of high costs (performances), lack of relevance, and scarcity of leisure time. The study proposed achieving a greater balance between the respective needs of arts producers and consumers.

Tony Bennett and John Fraw, 'Art galleries: who goes' in Simon Blackall and Jan Meek (Eds), *Every vital aspect of museum management*, The International Council of Museums, 1992. ISBN 9290121130

Details a survey of visitors to three institutions, and provides a demographic and attitudinal cluster analysis defined as six key groups: art enthusiasts, older conservatives, apprentice enthusiasts, moderate progressives, conservatives and progressive traditionalists. This chapter's exploration of 'educational' vs. 'entertainment' values informed the audience survey questionnaire for the Australian study. The study also profiles regular visitors vs. non-goers; non-goers includes the elderly, children, homemakers, rural dwellers, males and people from non-English speaking backgrounds.

Heather Maitland, *A guide to audience development*, Arts Council of England, 2000. ISBN 0728707500

Looks at how to go about audience development, including suggestions for research as well as a wide range of case studies. The publication may be downloaded from <www.artscouncil.org.uk>.

Victoria and Albert Museum—Qualitative Research, London, 2000.

Some findings in this report, highlighted below, informed the research team's approach for the Australian study:

- the audience link to art and design, artists, friends of artists
- 'educational', 'inspirational' and 'discovery' aspects of contemporary art are important to audiences
- the tag of 'museum' is misleading and engenders different expectations.
- 'contemporary', as a word to describe art, is not fully understood
- a venue's architecture impacts on audience perceptions of exhibits: Victoria and Albert = old historical building = historical exhibitions
- signage is important in navigating new audiences through the building and exhibits.

Audience research in Australia

Australia Council staff specified organisations that could be contacted to source audience research data. Additionally, galleries surveyed were asked about the occurrence and frequency of their own audience research. Galleries that conducted their own research were contacted again to determine the research scope and secure copies of any reports.

The following reports (or extracts) on audience research were sourced:

- Queensland Art Gallery, *Asia Pacific Triennial: Visitor research 1999/2000*
- Australian Centre for Contemporary Art, *2000 visitor survey*
- 24HR Art—Northern Territory Centre for Contemporary Art, *Member and audience research, 2000*
- Object—Australian Centre for Craft and Design, *Friend and member research, 2000*
- *Object* (magazine of Object—Australian Centre for Craft and Design), *Reader survey results, 2000*
- Perth Institute of Contemporary Arts, *Information requirements of organisations involved in the Perth Cultural Centre development, 2000.*

Queensland Art Gallery, *Asia Pacific Triennial: Visitor research 1999/2000.*

Sample: 412 people.

In addition to demographic profiling of Triennial visitors, the survey explored reactions to exhibition and presentation formats, response to children's activities, media habits, and awareness of the art of the Asia-Pacific region. Visitor suggestions for improvements included:

- more information—more detailed explanation of works and artists' intentions
- preference for individual booklets, with a map of the exhibition
- better signage, more seating, music, drinking fountains and a family oriented kiosk.

Australian Centre for Contemporary Art, *2000 visitor survey.*

Sample: not known.

In addition to demographic profiling, the survey explored patterns of visitation, knowledge of ACCA services and developments, and attendance at other artforms. Findings indicated a younger audience bias, high education levels, and a clear correlation between visitors and study in art courses or subjects.

24HR Art—Northern Territory Centre for Contemporary Art, *Member and audience research, 2000.*

Sample: 121, 156 and 149 people plus four focus groups.

This study was useful in alerting the research team to the potential impact of access (uncluttered entrance) and signage, the perception of an empty silent room as alienating and unwelcoming, and the need for more information about the context of artists' work.

In addition to demographic profiling of members and audiences, the survey also explored the current positioning of the gallery visitor patterns, and attitudes and perceptions of the gallery overall.

Other Australian audience research

Further contact was also made with the following organisations that had undertaken some form of audience research:

- National Gallery of Australia (NGA)
- Museum of Contemporary Art (MCA)
- Jam Factory Contemporary Craft and Design
- Adelaide Festival of Arts
- Art Gallery of South Australia (AGSA).

It was not possible to source research data from these organisations, but brief notes of telephone discussions are included in Appendix 3 of the research team's original report (held in the Australia Council library). Both the NGA and MCA undertake regular audience research. The AGSA undertook a survey in late 1999 / early 2000. The Jam Factory has undertaken informal qualitative research, member surveys and records customer data in the retail area. The Adelaide Festival considers their audience research to be confidential.

Related Australian research

Publications commissioned by the Australia Council and mentioned below can be found online at <www.ozco.gov.au/resources/publications> or copies can be requested by emailing <publicaff@ozco.gov.au>.

Saatchi & Saatchi, *Australians and the arts*, Australia Council, Sydney, 2000. ISBN 0642472270

The Australia Council commissioned this large-scale qualitative and quantitative study to inform strategy on promoting the 'value of the arts' to all Australians. It contains more than 60 recommendations covering terminology, strategic development, communication and promotion, and demographic outcomes. The research findings seeded a new Australia Council initiative—*Promoting the value of the arts*—through its Audience and Market Development division. The initiative focuses on implementing the report's recommendations through partnerships and projects concerned with branding the arts, promoting the arts as a valuable life-long learning choice for every Australian, and improving media relations.

BIZTRAC, Donovan Research, *Marketing the arts: A study of marketing and audience development by Australian arts organisations*, Australia Council, Sydney, 1997. ISBN 0642264023

This study, commissioned by the Australia Council, focused on marketing activity rather than research.

Quadrant Research Services, *To sell art, know your market*, Australia Council, Sydney, 1997. ISBN 1862571406

This study, commissioned by the Australia Council, focused on art buyers. It conducted qualitative research among active, lapsed and potential buyers. The study also comprised a self-completion questionnaire distributed to contacts provided by galleries, dealers and auction houses, and a short telephone survey of the population profiling buyers and galleries.

Some findings highlighted the qualities shared by contemporary art buyers:

- Art training, even as far back as primary school, influences purchasing patterns.
- An art-interested family, partner or friend can encourage purchases.
- Purchasing decisions are driven by a broad engagement with art and culture: working in a cultural field (architecture, music, film) was closely correlated, as was overseas travel.
- Art buying signalled change, maturity and 'branching out' for some. Others felt it was important to encourage an art interest in their family and children.

Helen Close and Robert Donovan, *Who's my market: a guide to researching audiences and visitors in the arts*, Australia Council, Sydney, 1998. ISBN 0642588074

This guide to designing and conducting audience research was commissioned by the Australia Council. Its case studies and questionnaires prompted some ideas for this Australian study, specifically *Case 5: The Museum of Art*.

Su Hodge, Judith James and Amanda Lawson, *Miles ahead: arts marketing that works in regional Australia*, 1998. ISBN 0642588074

The case study *Getting them and getting them back—Bendigo Art Gallery* was particularly useful. To broaden its audience from the core demographic of females over 50, the gallery devised programs simultaneously targeting children, teenagers and 30–40 year olds.

Dr Peter Steidl and Robert Hughes, *Marketing strategies for arts organisations*, Australia Council, Sydney, 1997. ISBN 1862571430

Commissioned by the Australia Council, this 'do it yourself' manual on developing marketing strategies includes guidelines on designing market research.

Pino Migliorino, *The world is your audience: Case studies in audience development and cultural diversity*, Australia Council, Sydney, 1998. ISBN 0642472084

The Australia Council commissioned the authors to research and document initiatives attracting people from non-English speaking backgrounds to mainstream cultural venues and arts activities.

The research findings suggested that any comprehensive and meaningful research on the attitudes and attendance patterns of this group required separate studies, specifically focused on:

- language-specific qualitative and quantitative research
- existing cultural behaviour data
- community networks and consultation.

Future data collection

This literature review does not claim to be exhaustive. Many more audience or customer surveys no doubt exist (for instance, among regional galleries not participating in this research), which haven't been identified at this stage.

This publication could prompt galleries and organisations to alert the Australia Council's Visual Arts and Craft Board of any recent research undertaken.

Galleries will inevitably compare their own audience research results with findings in this study. To better enable comparisons and a view of trends, the sector could be encouraged to standardise components of future surveys.

Reference Panel Members

Chart 4.6: Reference panel members

Name	Position	Organisation
Mr Ashley Barber	Director	Sarah Cottier Gallery
Ms Jenefer Duncan	Director	Australian Centre for Contemporary Art
Mr Peter O'Neill	Director	Wollongong City Gallery
Ms Julianne Pierce	Executive Director	Australian Network for Art and Technology
Mr Steven Pozel	Director	Object, Australian Centre for Craft and Design
Mr Christopher Snelling	Head of Marketing & Communications	Museum of Contemporary Art
Ms Brenda L Croft	Senior Curator, Indigenous Art	National Gallery of Australia