Guess Who's Going to the Gallery?

Queensland Report 2013

A Strategic Audience Evaluation and Development Study for Queensland Galleries

Queensland Government

Australian Government

Australia Council for the Arts

Australian Government
Visual Arts and Craft Strategy
Queensland

This project has been assisted by the Australian Government through the Australia Council for the Arts, its arts funding and advisory body, and is supported by the Visual Arts and Craft Strategy, an initiative of the Australian, state and territory governments.

Museums & Galleries NSW

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Funding Partners

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Project Team

Project Team – M&GSQ

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Research Partner

Participating Queensland Galleries

- Artspace Mackay
- Bundaberg Regional Art Gallery
- Cairns Regional Gallery
- Caloundra Regional Gallery
- Gladstone Regional Art Gallery and Museum
- Gold Coast City Gallery
- Gympie Regional Gallery
- Hervey Bay Regional Gallery
- Ipswich Art Gallery
- KickArts Contemporary Arts
- Logan Art Gallery
- Noosa Regional Gallery
- Perc Tucker Regional Gallery
- Pinnacles Gallery
- Redcliffe City Art Gallery
- Redland Art Gallery
- Stanthorpe Regional Art Gallery
- Toowoomba Regional Art Gallery

Introduction

Image courtesy of Caloundra Regional Gallery

Background

- In 2005 Museums & Galleries NSW (M&G NSW) commissioned a scoping study of 32 regional galleries in NSW. This research revealed that there was very little to no audience development research undertaken by regional galleries across the state.
- In May 2007, following the outcomes from the scoping study, M&G NSW commenced the *Strategic Audience Evaluation & Development Study for Galleries in NSW* with core project funding from the Australia Council for the Arts.
- The study set out to provide benchmark information on gallery audiences, their demographics, actions, attitudes, limitations and needs. M&G NSW trained staff and volunteers at the participating galleries and collected data using a paper questionnaire.
- In the first year of research 2007-2008, M&G NSW worked with 12 galleries across two regions of NSW - Western Sydney and the Hunter/Central Coast. In 2008-2009, M&G NSW worked with 10 Sydney Metropolitan galleries and in 2009-2010 a further 19 regional galleries took part in the project.
- The data from the NSW individual galleries was collated and released as the NSW State Report in early 2011. That report may be found at www.mgnsw.org.au
- In 2012, with project funding from the Australia Council for the Arts and Arts Queensland, Museum & Gallery Services Queensland (M&GSQ) partnered with M&G NSW to undertake a parallel study of 18 regional Queensland public galleries. As in the NSW Study, each gallery received training on data collection and a bespoke report of their results.
- A total of 3041 responses were collected across the eighteen galleries and were collated into this Queensland Report, released in 2013.

Study Aims

The overall objective of the Study is to provide factual and reliable data for the sector.

This data can be used to support initiatives for the individual galleries to:

- Identify and assist to retain current audiences.
- Identify opportunities to build new audiences.
- Understand the diversity of their audiences.
- Offer programming possibilities.
- Determine ways of effectively marketing and publicising exhibitions and events, as well as attracting audiences.
- Plan effectively for the future.
- Advocate for regional and state-wide programs of audience development.

The data presented is intended to act as a benchmark, and as a guide for future research opportunities.

Methodology

The questionnaire:

- A standardised self-complete paper survey was designed for use in all the participating galleries.
- Training was provided to staff and volunteers from each participating gallery.
- Staff and volunteers distributed the self-complete paper survey to visitors, during the allocated survey periods.
- 3041 responses were collected from Queensland participating galleries during the period March 2012 through October 2012.

The sample:

- Visitors 15 years or older.
- Children and school teachers attending in school groups were not surveyed, as the questionnaire was not designed for educational visits. The 15-18 year olds who participated in the survey were visiting alone, or with family or friends.
- A maximum of 2 people were surveyed in any one tour group.
- The standardised questionnaire was only available in English. This may have reduced the participation of visitors who spoke English as a second language or visitors with literacy barriers.

Methodology (continued)

Egalitarian data weighting:

- The 2009 Study, which focused on galleries in Sydney Metro exclusively, created an index called the "Sydney Metro Index". The Index essentially weighted the data from all galleries so that they contributed an equal share to the overall statistic for that region. The alternative would have been to weight the size of annual visitation.
- However, some galleries in Sydney (notably the Art Gallery of NSW and the Museum of Contemporary Art) have such high levels of visitation, weighting the data to actual visitation rates would have skewed the results substantially (in favour of their visitor base).
- The 2010 NSW State Report also weighted the data from all galleries so that they contributed an equal share to the overall statistic for both the State and each region.
- For the Queensland Report, all regional galleries have been weighted to an equal base, so that each gallery is having an equal say in the indices generated by their groupings. The only exceptions are Toowoomba Regional Art Gallery, KickArts Contemporary Arts and Redcliffe City Art Gallery who received half (0.5) weightings. This was done so that the smaller sample sizes gathered in these galleries did not skew the regional indices.

Regional groupings:

- Recognising the geographic diversity within Queensland, regional galleries have been grouped into 3 distinct regions (described overleaf): North-Eastern Queensland (NQ), Central-Eastern Queensland (CEQ) and South-East Queensland (SEQ).
- Like the Queensland Index described above, each gallery has an equal weighting within the regional total (with the exception of the 3 galleries mentioned above which have a lower weighting).
- Individual galleries can compare their unique gallery data to either the Queensland Index or Regional Index.

Breakdowns by key demographics and visitor types:

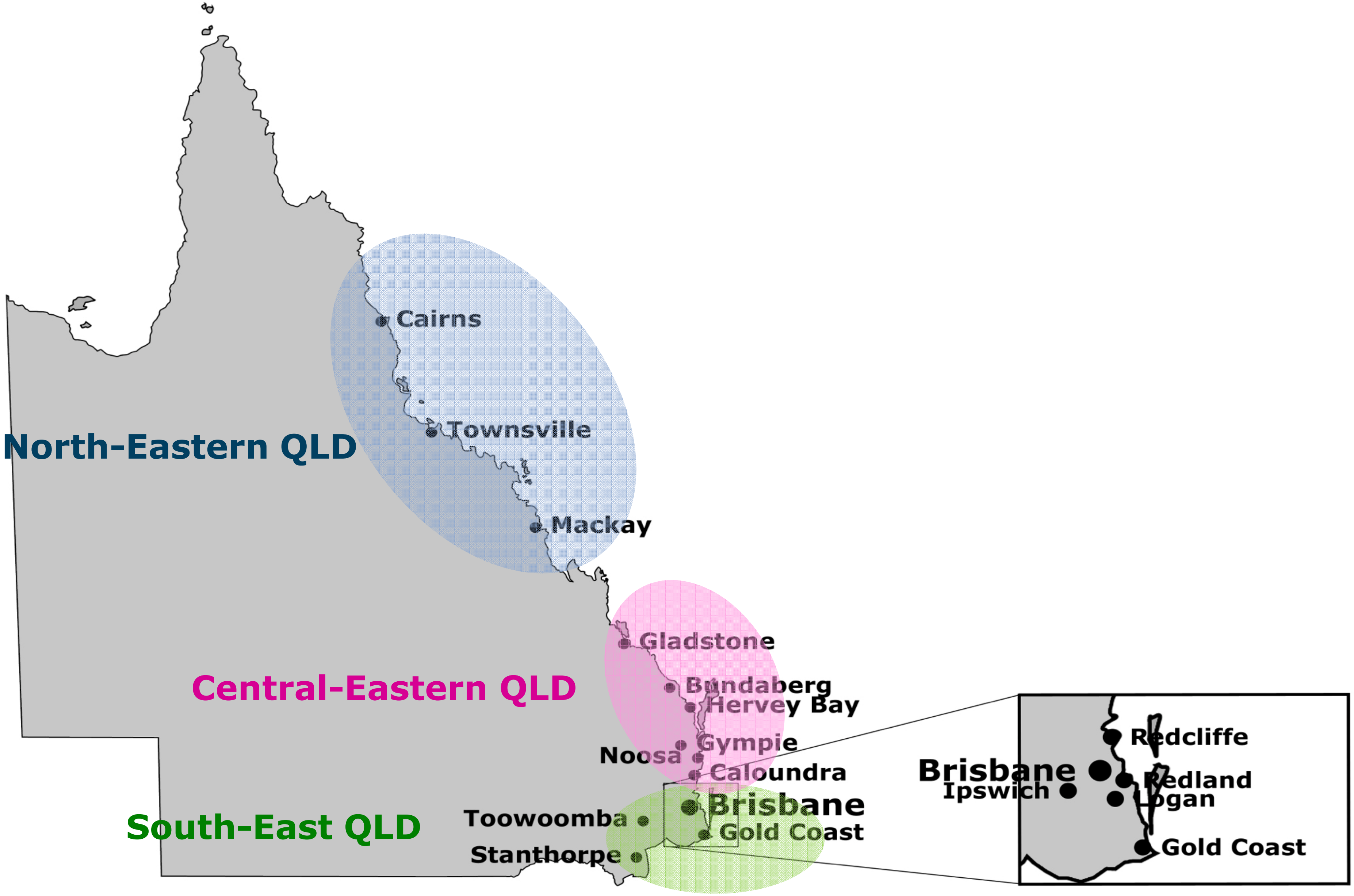
- This report also looks at differences between key demographics (notably Age x Gender) and between different visitor "types" (such as tourists, international tourists, interstate tourists, first-time visitors, and so forth).

Participating Galleries

North-Eastern Queensland	Central-Eastern Queensland	South-East Queensland
▪ Artspace Mackay ▪ Cairns Regional Gallery ▪ KickArts Contemporary Arts * ▪ Perc Tucker Regional Gallery ▪ Pinnacles Gallery	▪ Bundaberg Regional Art Gallery ▪ Caloundra Regional Gallery ▪ Gladstone Regional Art Gallery and Museum ▪ Gympie Regional Gallery ▪ Hervey Bay Regional Gallery ▪ Noosa Regional Gallery	▪ Gold Coast City Gallery ▪ Ipswich Art Gallery ▪ Logan Art Gallery ▪ Redcliffe City Art Gallery * ▪ Redland Art Gallery ▪ Stanthorpe Regional Art Gallery ▪ Toowoomba Regional Art Gallery *

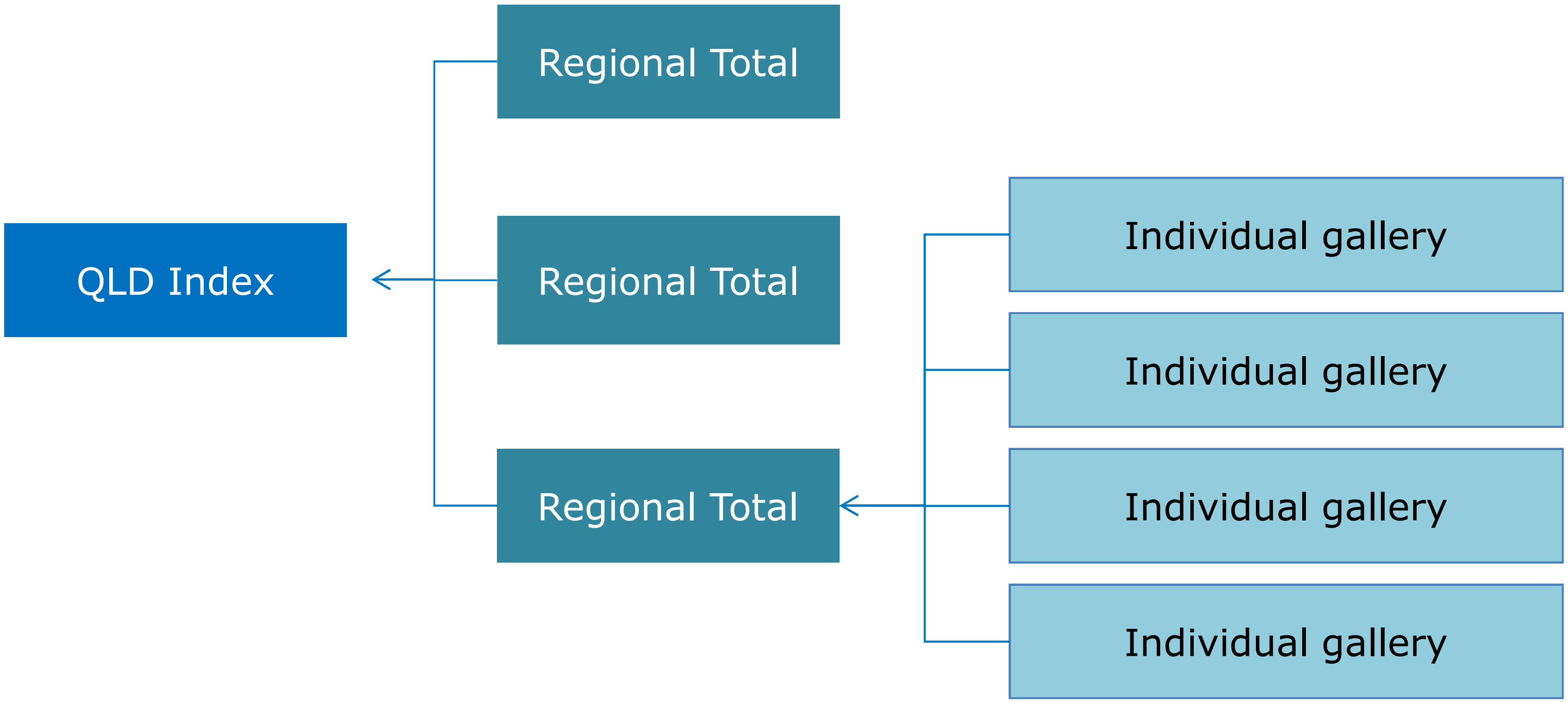
* *Denotes galleries that have a half-weighting so that the smaller sample sizes gathered in these galleries did not skew the regional indices.*

Regional Classification Map



Indexes

- The regional groupings are indices unto themselves, but also aggregate to create a “Regional Total” and “QLD Index”.
- All the boxes below represent indices that are examined in this report to compare regional data.
- The indices can combine to create high-order indices, such as the “Regional Total” and “QLD Index”.



Key terms

- **The "QLD Index"**
  - The standardised average score for all the participating galleries across Queensland.
  - It can be referred to simply as "the Queensland average" or the "State average" in the context of this report.

- **"Tourists"**
  - Audience members who nominate they live *interstate* or *internationally*, OR those who live within Queensland *(intrastate)* but who also nominate that they are "visiting town" by virtue of ticking the appropriate box.

- **"Audience"**
  - In this context is synonymous with gallery "visitors".

- **"Base"**
  - The number of respondents on whom the percentage figure or statistic is calculated.
  - Bases vary as data is filtered so as to analyse specific sub-groups, or if certain respondents do not provide a valid answer to a question. **Unweighted** valid base sizes are shown on all graphs where appropriate.

Notes on reading charts

- ***All figures*** shown are ***percentages*** unless otherwise specified.
- Some data (where appropriate) is compared to Australian Bureau of Statistics (ABS) data including related 2011 census data.
- Individual bases for the data are shown with a description of any applied data filters.
- For ease of reading, where a percentile is under 2%, the number may have been removed.
- For each question, standard breakdowns are shown for:
  - **Regions**.
  - **Key demographic segments** (namely, GENDER x AGE brackets).
  - **Tourist type** (comparing International, Interstate, Intrastate, and "Local" Visitors).
- The standard presentation of a single-response question is explained below.
- Note: Charts can add to over 100% (eg: 101% or 99%) due to whole number rounding error.

Executive Summary

Image courtesy of Hervey Bay Regional Gallery

Summary of Key Findings

Audience profile skews

- Individual galleries can vary quite markedly in their audience profile. Individual galleries are encouraged to compare their gallery-specific data against the relevant regional benchmarks (averages).
- One consistent finding across galleries and across regions is the skew towards females and towards the over 55's in the audience base.
- Just over 2 in 3 visitors are female (rule of thumb) and around half (49%) of the audience is over 55. Both of these are over-represented in gallery audiences compared to the relevant ABS data.
- It is interesting that the public gallery audiences in Queensland skew away from the under 35's whereas the age group in the middle (35-54, ie: "the family age band") are relatively proportionate to ABS data (around a third or 32%). In other words, the increase in over 55's appears to be offset by the dip in under 35's.
- Tourist audiences tend to be younger and more male than the non-tourist audiences. Tourists also tend to be more likely to come with a spouse/partner and less likely to come on their own compared to the non-tourist visitor.
- Although all education levels are represented in the different regions, audiences in Queensland public galleries are showing a skew (48%) towards tertiary degrees, particularly post-graduate qualifications. This compares with recent ABS figures which show that 23% of Australians between 15-64 hold a bachelor degree or higher as a highest level of education (Source: ABS 6227.0).
- Regional differences in key demographics are minor.
  - The three Queensland regional areas (North-Eastern Queensland, Central-Eastern Queensland and South-East Queensland) do not differ markedly from each other with respect to the key characteristics. Within these areas there are *individual galleries* with idiosyncratic profiles (eg: galleries in areas of high tourist traffic). The exception to this is the North-Eastern Queensland audiences which have a higher representation of the under 35's.

Summary of Key Findings

Tourism is the most prominent behavioural determinant

- An audience tourist-status is a fundamental divide in their attitudinal and behavioural profile. This is consistent with the NSW findings.
- Throughout the report, analysis is sometimes made excluding the tourist base because this group thinks and acts differently from the "non-tourist" audience base.
- All regions across Queensland show a proportion of tourists of intrastate, interstate and international origins. The relative proportions of these can vary greatly between galleries (eg: 0% to 31% international tourists, and 2% to 63% interstate/international combined).
- Differences between the three tourist-types (international, interstate and intrastate) are broken down in the report, but generally international and interstate tourists are much more likely than non-tourists to:
  - Be first-time visitors (the major difference)
  - Attend with a spouse/partner
  - Spend longer in the gallery on average
  - Be motivated by the general collection rather than a special exhibition
  - Uptake tourist fliers and hear about the gallery by simply "passing by"
  - Be (slightly) more gender balanced
  - Have not attended a public program at the gallery before
  - Have not heard about the gallery through local media (community newspapers, radio, poster, etc.)
- However, "Queensland tourists" (those living more than 50km from the gallery, but within Queensland) are often more likely to behave like non-tourists or sit between the differences in local and tourist profiles.
- Tourists who visit galleries stay on average four or more nights in a region.

Summary of Key Findings

History of visitation

- First-time visitors make up nearly one third of the average public gallery audience in Queensland (at 30%).
- Limiting the analysis to the non-tourists (i.e.: excluding tourists from the sample), the proportion of first-timers drops across regions to around 16% (or just over 1 in 8 visitors).
- Across regions, there is evidence that most visitors have been to the gallery multiple times before. Over half of the visitor base (amongst non-tourists) has been, on average, more than 5 times.
- Amongst the non-tourist pool, women are slightly more likely to be visiting the gallery overall, particularly in the 45+ age groups.
- Amongst repeat visitors to the gallery (i.e.: excluding those who have "never visited before") the majority (around two-thirds) are returning to the gallery within a six-month period.
- Amongst non-tourists, proximity again plays a role. Those living closer to the gallery (within 5km) are more likely to have visited more than 5 times in the past and are more likely to return within a six-month period.
- A parallel finding from the Study is that a high proportion (at least three-quarters, rule of thumb) of public gallery visitors have been to other public galleries in the last 12 months, both within the same region and elsewhere. Furthermore the data shows this increases with increased familiarity with a particular gallery (i.e.: the "gallery enthusiasts").

Summary of Key Findings

Visitation patterns of behaviour

- At the total average level, the regions do not differ markedly with respect to:
  - The social arrangement of visitors - around 1 in 3 visitors are coming alone and around a quarter with a spouse/partner.
  - The length of visit (typically up to 60 minutes for 83% of the visitor base), and
  - The likelihood to have attended a public program at the gallery in the past (at just over a third of the total visitor base, including tourists).
- Differences in visitation patterns emerge when the data is examined by the key demographics and where the visitors live (particularly amongst the tourist groups as discussed).
- For instance, men at each age level are more likely to be coming along with a spouse or partner than women, particularly in the 55+ age brackets. This suggests that men are more likely to be coming because of a female spouse/partner than the converse.
- Under 45's men are more likely to be coming on their own compared to females of the same age group.
- Interestingly, those living closer to the gallery (within 5km or within the Local Government Area (LGA)) are more likely to have attended a public program at the gallery in the past. Around a quarter of Queensland tourists have attended a public program at the gallery before.

Summary of Key Findings

Communications, Motivations & Public Programs

- Across all visitor types and gallery regions, "word of mouth" is the single most effective means of connecting with a gallery audience. As a rule of thumb, two in five public gallery visitors heard about the gallery or exhibition by a recommendation from someone else.
- Amongst the non-tourists, the local newspaper and brochures/fliers are common sources of information. Interestingly, non-tourists are also ready up-takers of "tourist information", underscoring the accessibility and universality of such information.
- The use of the Internet as a source of information about the gallery is surprisingly low, around 8% on average. Despite this, public gallery visitors are mostly online, with at least 85% having access to the Internet. Interestingly, nearly 75% of visitors currently use the Internet to "find out about things to do" and represent key potential for marketing growth.
- Interest in the types of events, public programs and exhibitions at the gallery varies primarily by demographic segment. In general female audience members are more likely to express interest in programs/exhibitions than men.
- However, young males show a particular interest in emerging art forms such as digital media arts. Nearly half of young males (under 25) express interest in these program types.

Summary of Key Findings

Satisfaction

- One of the most pleasing and enduring findings from across all regions is that satisfaction with each of the galleries is generally very high, with most galleries receiving at least 90% “good” or “terrific” ratings. This is true across regions and visitor types.
- Typically the helpfulness of staff and volunteers is the area most likely to receive a “terrific” rating from the audience, followed by the quality of the exhibition.
- On the other hand, some specific areas show a small pool of visitors “disappointed” (less than 15% in most aspects). These often tend to be around issues over which the individual gallery may have little direct control, such as: ease of parking, signage and the café. Interestingly, no clear demographic skews exist that can point to audiences who are more or less likely to be disappointed.
- Individual galleries received verbatim feedback on areas of delight and suggestions for improvement from the respondents in each gallery who offered feedback. Some of the most common types of feedback have included:
  - Praise for the helpfulness of staff and volunteers.
  - Appreciation and enjoyment of the artwork presented.
  - Enjoyment of the environment and atmosphere in the galleries.
  - A call for a café if one is not present, as many visitors like to share their experience with others and enjoy the social aspect of their visit.

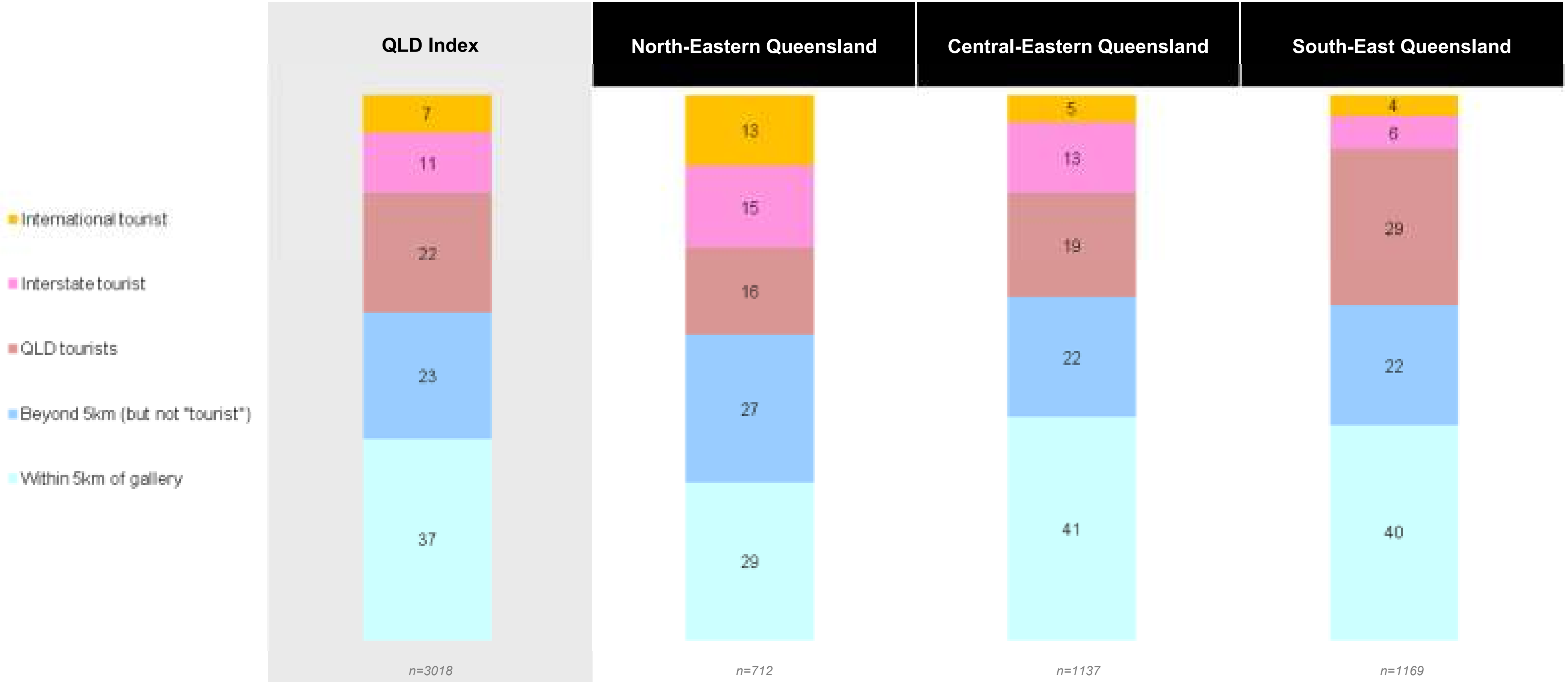
Visitor Demographics

Image courtesy of Gympie Regional Gallery

Locations/Origins

Breakdown by GALLERY REGION

All figures are %



- Overall the audiences of QLD public galleries comprise a significant number of visitors who live within 5km of the gallery (37%).
- However at the individual gallery level, the proportion of visitors who live within 5km of the gallery can vary substantially, with some galleries having as little as 9% of visitors living within 5km of the gallery, and some with up to 74%.
- The proportion of interstate and international tourists can also vary between galleries in QLD – such as from 0% to 31% international tourists.
- At a broad level, the North-Eastern QLD galleries show the highest proportion of tourists.

(Location based on postcodes and Q18. - Are you visiting from overseas?) *Base: All visitors, all valid responses, visitors with invalid postcodes excluded*

LGA status

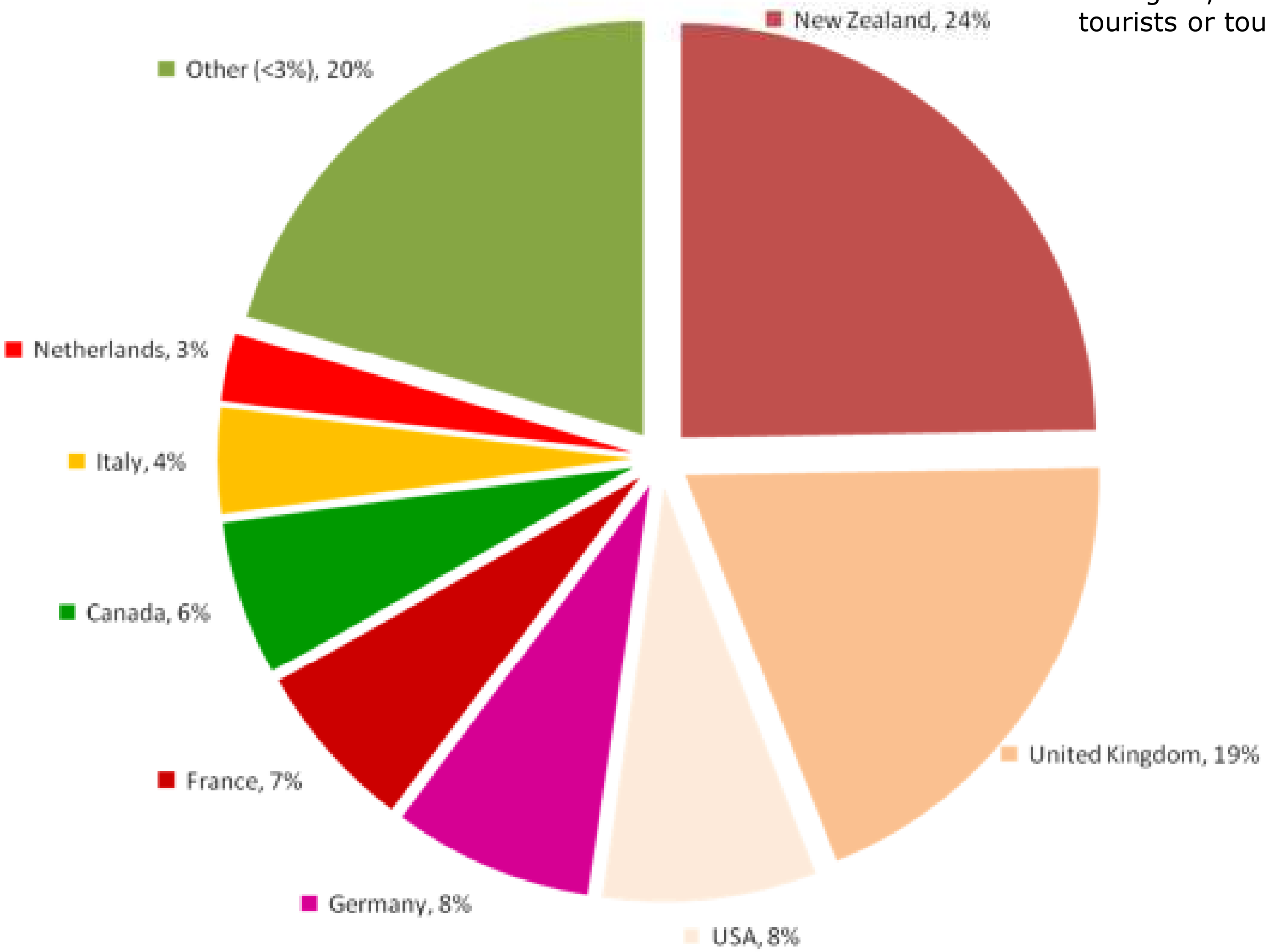
Breakdown by GALLERY REGION

All figures are %

- The proportion living within the local government area (LGA) of the gallery follows a similar pattern across regions to those living within 5km of the gallery (shown earlier).

International Tourist Origins

- Most of the international tourists recorded were from English-speaking countries.
- It should be noted that the questionnaire was only available in English, which may under-represent non-English speaking tourists or tourists with limited English.



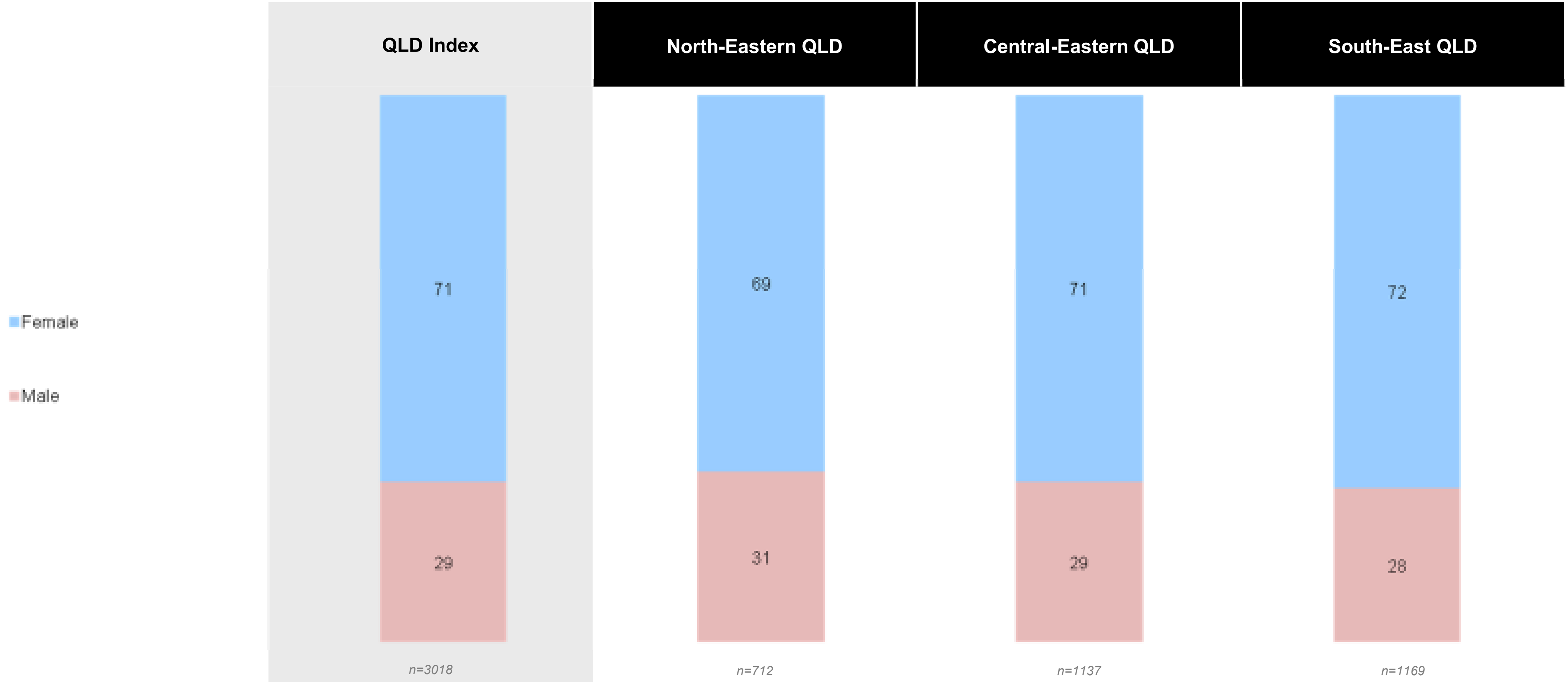
Countries with 2% or less of international tourist base	
Thailand	Portugal
Taiwan	China
South Africa	Switzerland
Israel	Britain
Japan	Abu Dhabi
Spain	
Sweden	
Malaysia	
Korea	
Singapore	
Austria	
Hong Kong	
Ireland	
Czech Republic	

Base: All international visitors, all valid responses

Gender

Breakdown by GALLERY REGION

All figures are %



- Across QLD, there is a consistent skew towards female visitors (71%)
- Some galleries show a more equal distribution of gender (at 44% male). The lowest male proportion at a QLD gallery was 22%.
- The 2011 ABS Census data for QLD shows male population at 49% in the 15+ age category.

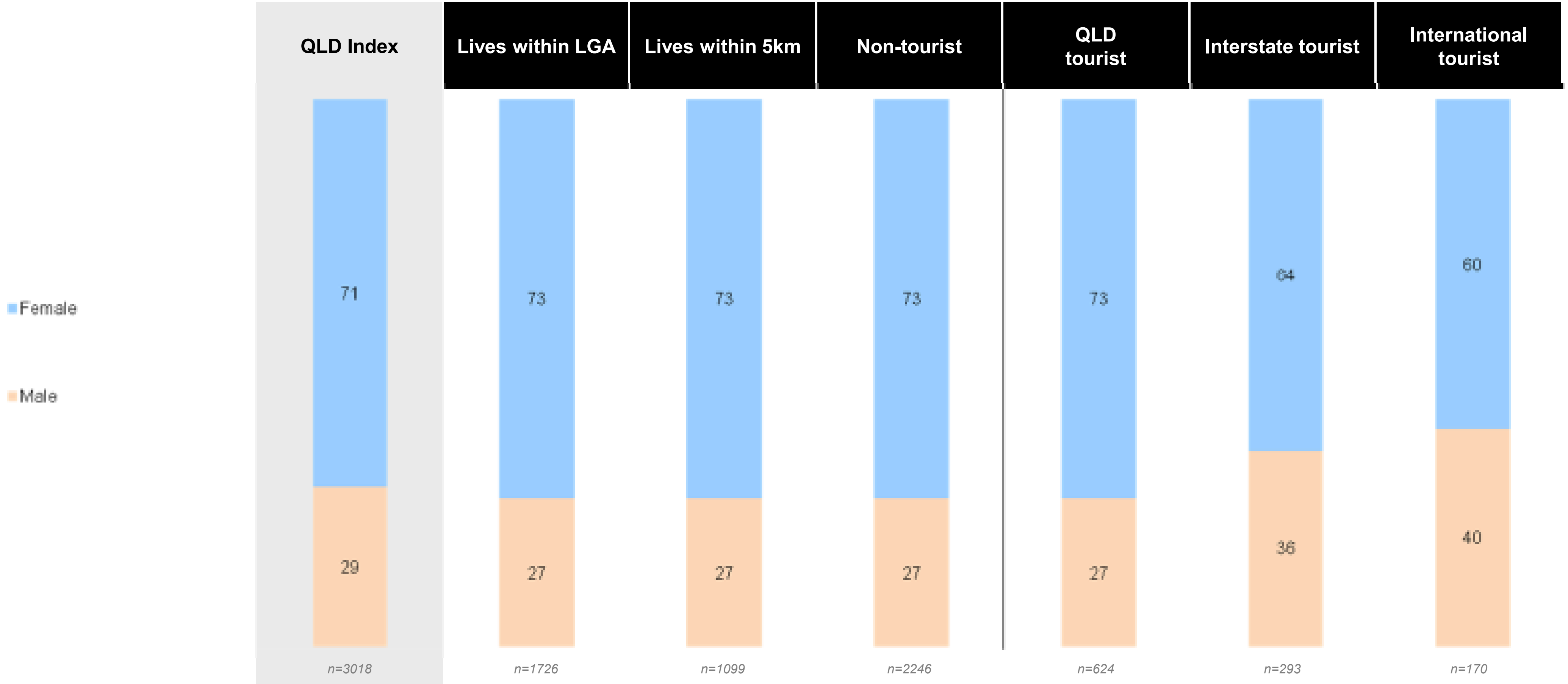
Q13. Are you Male or Female?

Base: All visitors, all valid responses

Gender

Breakdown by VISITOR ORIGINS

All figures are %



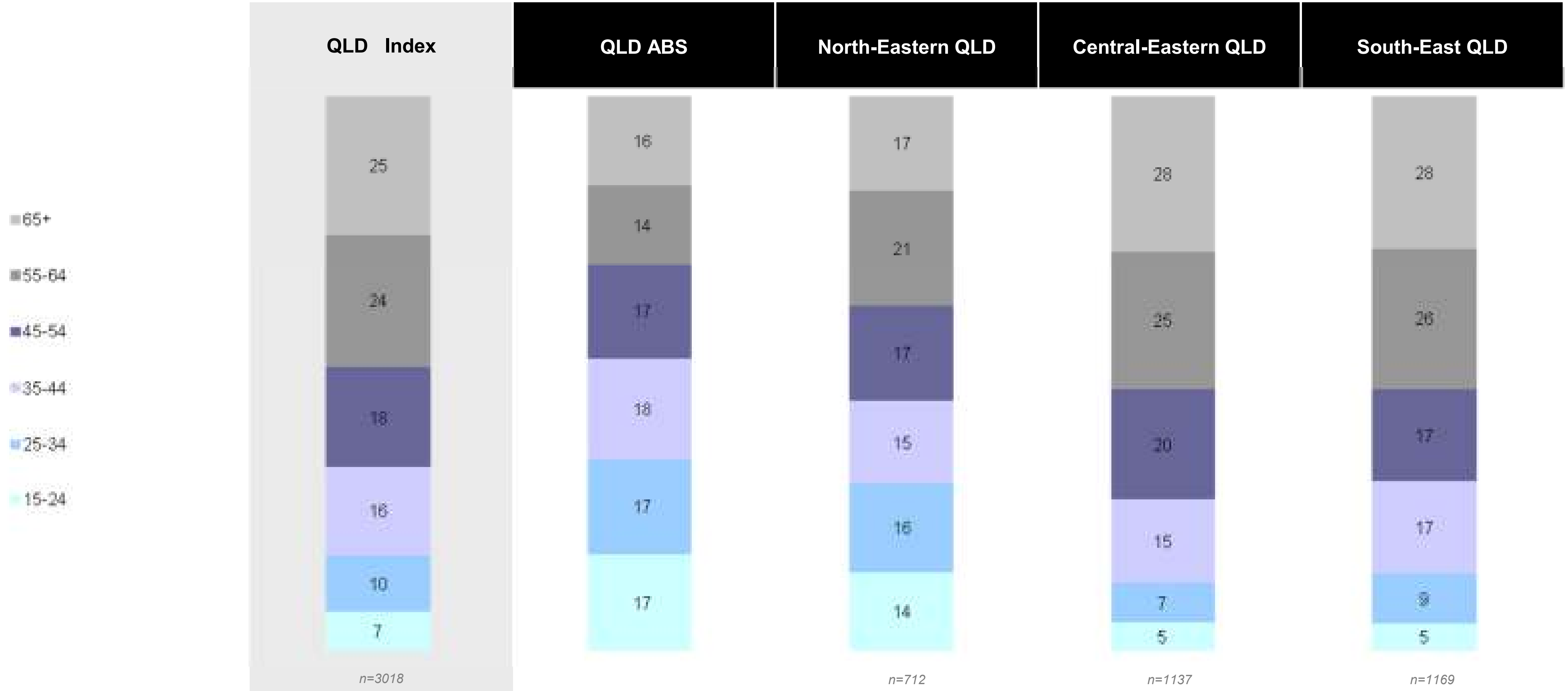
- The female skew exists across different types of visitors in QLD, although the extent of this may vary from gallery to gallery.
- Tourists are slightly more likely to show an even gender balance (although still majority female).
- The more even gender balance amongst tourists may be due to a greater number of tourists coming to the gallery with a partner or spouse, who in turn are more likely to be male (as shown in the *Visitor Behaviours* section of this report).

Q13. Are you Male or Female? *Base: All visitors, all valid responses*

Age

Breakdown by GALLERY REGION

All figures are %



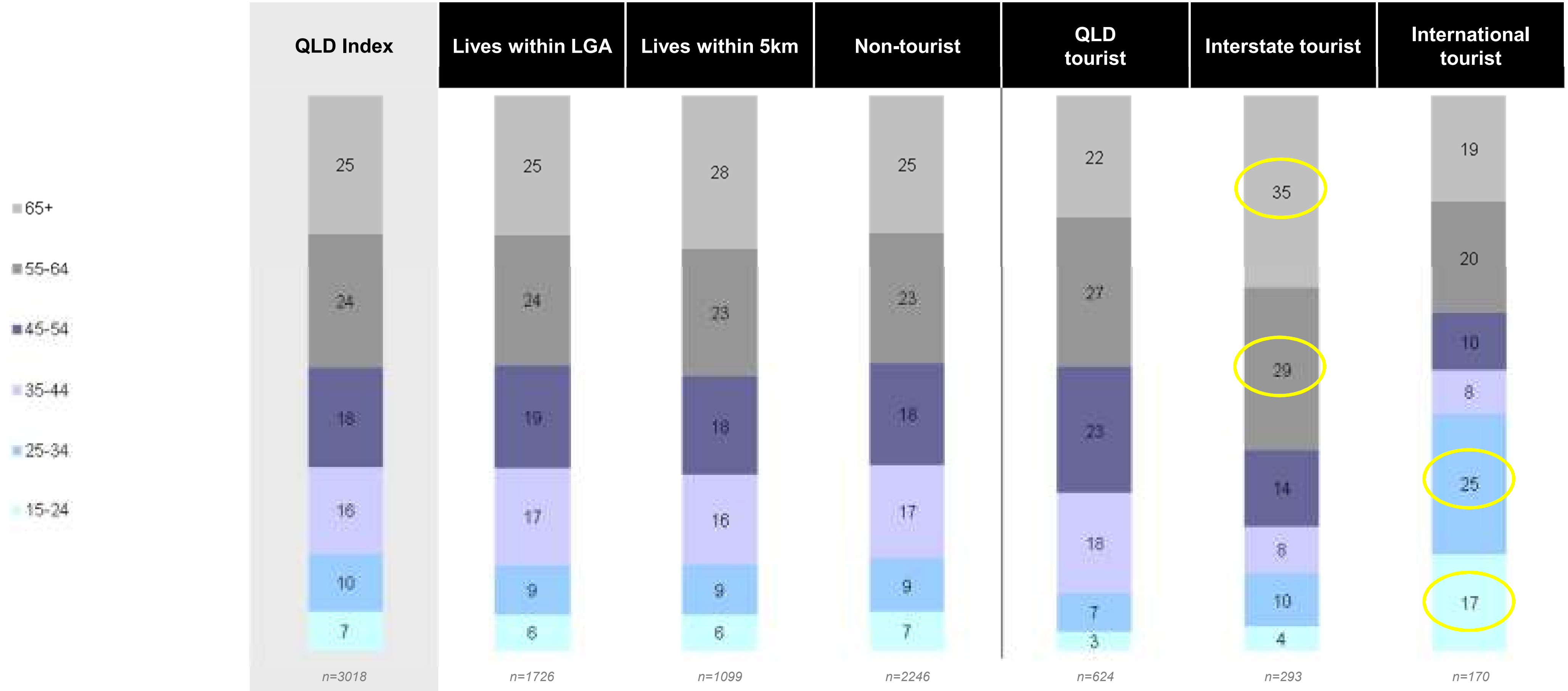
- *Note: Percentages *exclude* persons under 15 from the calculation (as gallery visitor sample excluded under 15's), even for ABS calculations shown.
- Across the regions, we see the average public gallery showing a skew significantly towards older visitors (namely the over 55's at 49%). This is perhaps less pronounced in galleries in North-Eastern QLD (38%), but the skew exists nonetheless.
- Generally, the skew in age seems to be driven by a lesser proportion of under 25's and 25-34's and a greater proportion of 55-64's.
- Visitors in the middle age bands, 35-54 (the "family-age bands"), do not differ as markedly from the ABS population distribution.

Q27. Which of the following age groups are you in? *Base: All visitors, all valid responses*

Age

Breakdown by VISITOR ORIGINS

All figures are %

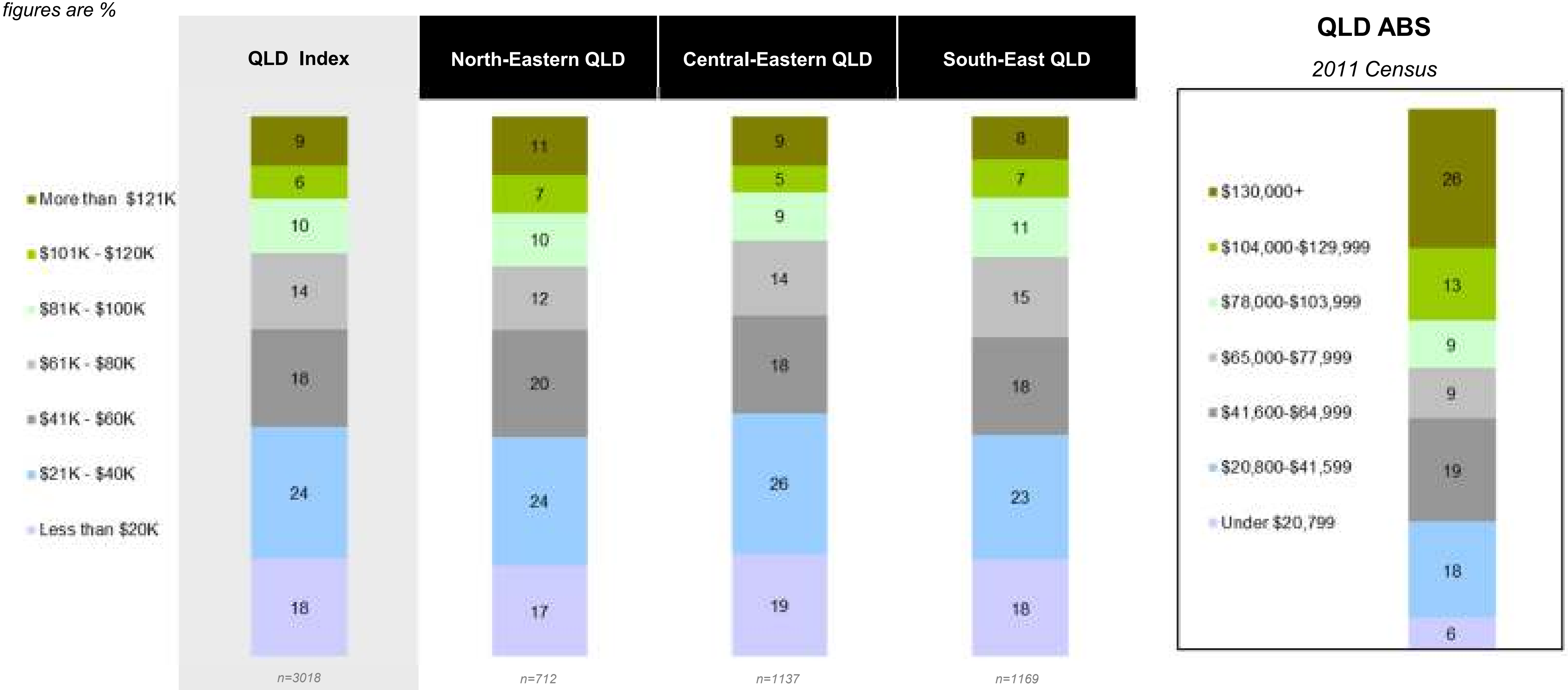


- International tourists skew markedly younger than any other grouping based on visitor origin. Under 34's are 42% of the visitor base.
- By contrast, the interstate tourists are the opposite, skew slightly older than non-tourists, driven by a greater proportion of over 55's (64%).

Income

Breakdown by GALLERY REGION

All figures are %



- Across regions, public galleries attract visitors from households with differing gross annual incomes, supporting the view that public galleries are an accessible cultural activity for all socio-economical levels. This does not vary by region.
- Note: Around 25% of respondents chose not to answer this question (and are excluded from the calculation). This is also consistent across regions and was true of the NSW research as well. Market research practice shows the refused income information does not skew higher or lower incomes, and this is assumed to be the case here.
- ABS data for gross annual household income is calculated on a scale different from that used in the survey. Nonetheless, it appears that gallery visitors come from slightly lower household incomes than the ABS data.

Occupation

Breakdown by GALLERY REGION

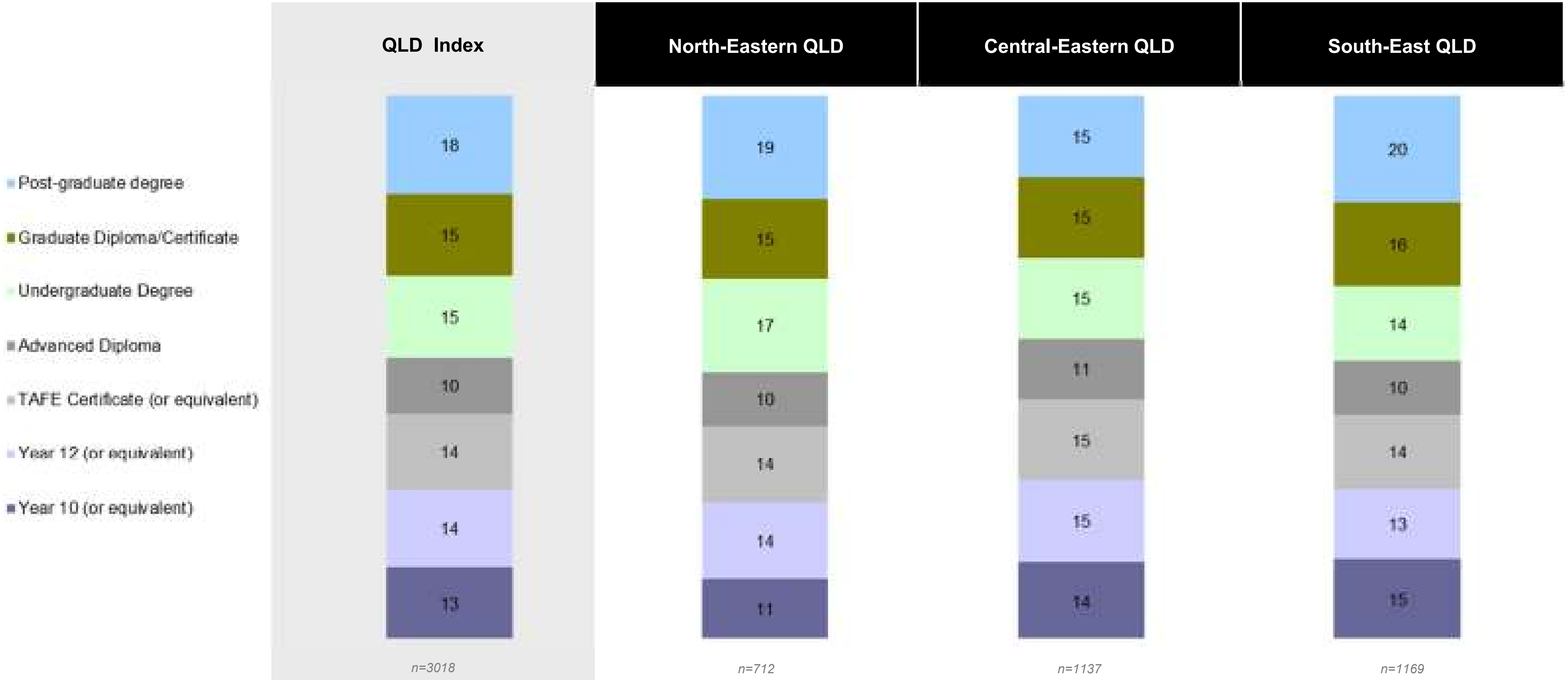
All figures are %

- The proportion of full-time workers and retirees varies slightly across regions. North-Eastern QLD shows the highest proportion of full-time workers (33%) and the lowest proportion of retirees (23%) amongst gallery visitors.
- North-Eastern QLD also attracts more students (11%).

Education

Breakdown by GALLERY REGION

All figures are %



- Across regions, different education levels are all represented amongst gallery-goers, and this remains consistent across regions.
- Recent ABS data (62227.0 *Education and Work,* May 2012) shows that 25% of Australians between 15-64 hold a bachelor degree or higher.

Diversity

Breakdown by GALLERY REGION & TOURIST TYPE

All figures are %

			GALLERY REGION			TOURIST TYPE	
	QLD Index	QLD ABS Census 2011	North-Eastern QLD	Central-Eastern QLD	South-East QLD	Interstate tourist	International tourist
Language other than English at home*	14%	5.52%	17%	11%	14%	14%	47%
Indigenous	3%	4.5%	2%	3%	4%	2%	2%
Disability that "impacts on their visit"**	3%	-	3%	3%	5%	3%	1%

- At a regional level, public galleries across each region are attracting a relatively even number of Indigenous visitors. This varies at the individual gallery level, with some galleries reporting no Indigenous visitation, and others with up to 7% Indigenous visitors.
- QLD galleries attract a larger proportion of Language Other Than English Spoken at Home (LOTE) audiences than the population (based on 2011 census data). Although regions vary, it remains higher than the ABS baseline. As expected, international tourists have the highest level of LOTE.
- **Note: the questionnaire for this survey was only available in English, which may have biased against LOTE visitors.*
- ***Note: No ABS data available for direct comparison to the disability question.*

Q14. Aboriginal or Torres Strait Islander descent?

Q15. Language other than English…?

Q26. Disability or other condition?

Base: valid responses only

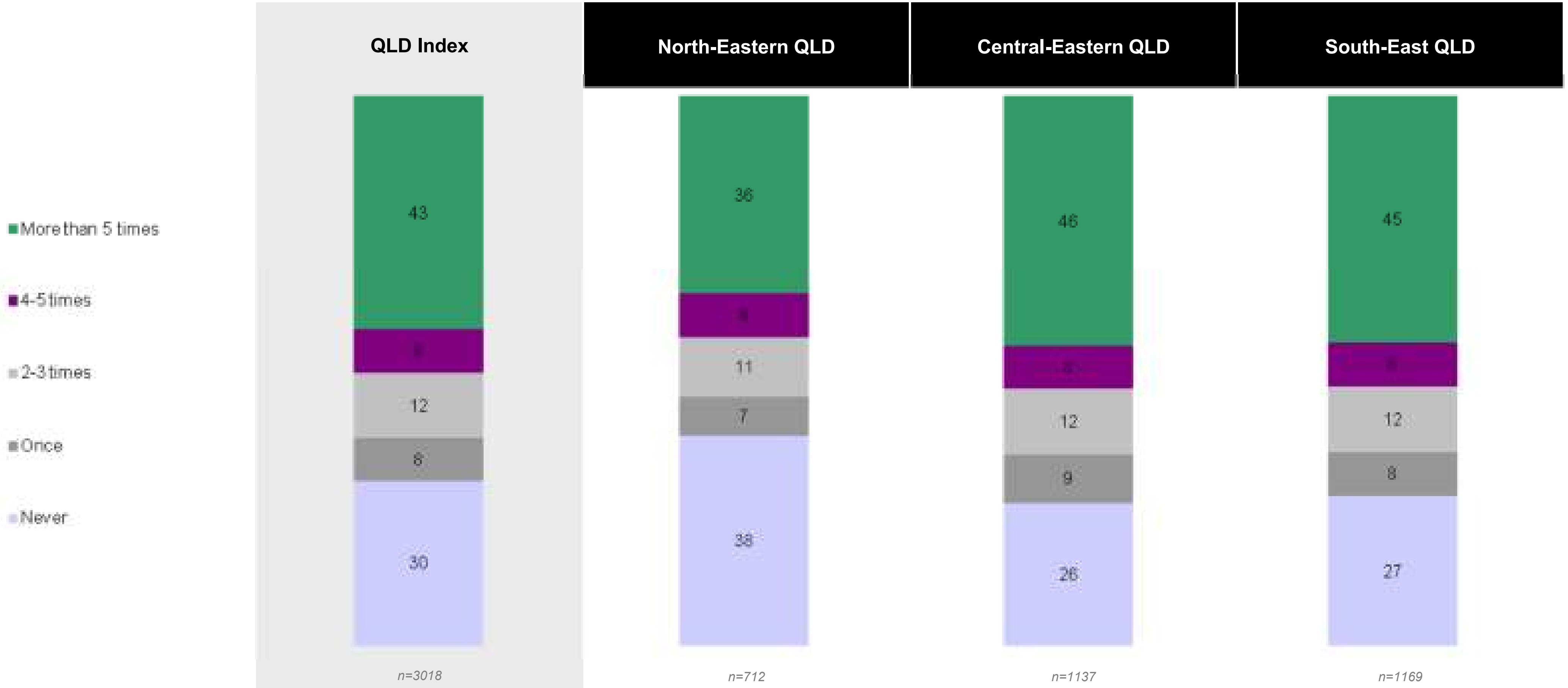
Visitor Behaviour

Image courtesy of Perc Tucker Regional Gallery

Number of times visited

Breakdown by REGION

All figures are %



- There is a sizeable proportion of visitors (in most cases nearly half the visitor base) who have been more than 5 times before.
- First-time visitors make up just under a third of visitors for the average public gallery in QLD.
- The slightly higher proportion of first-timers in North-Eastern QLD is likely due to its larger tourist base (as shown overleaf, when tourists are excluded from the analysis, regions are much more even).
- All regions are showing a similar proportion of visitors who have previously attended 2-5 times.

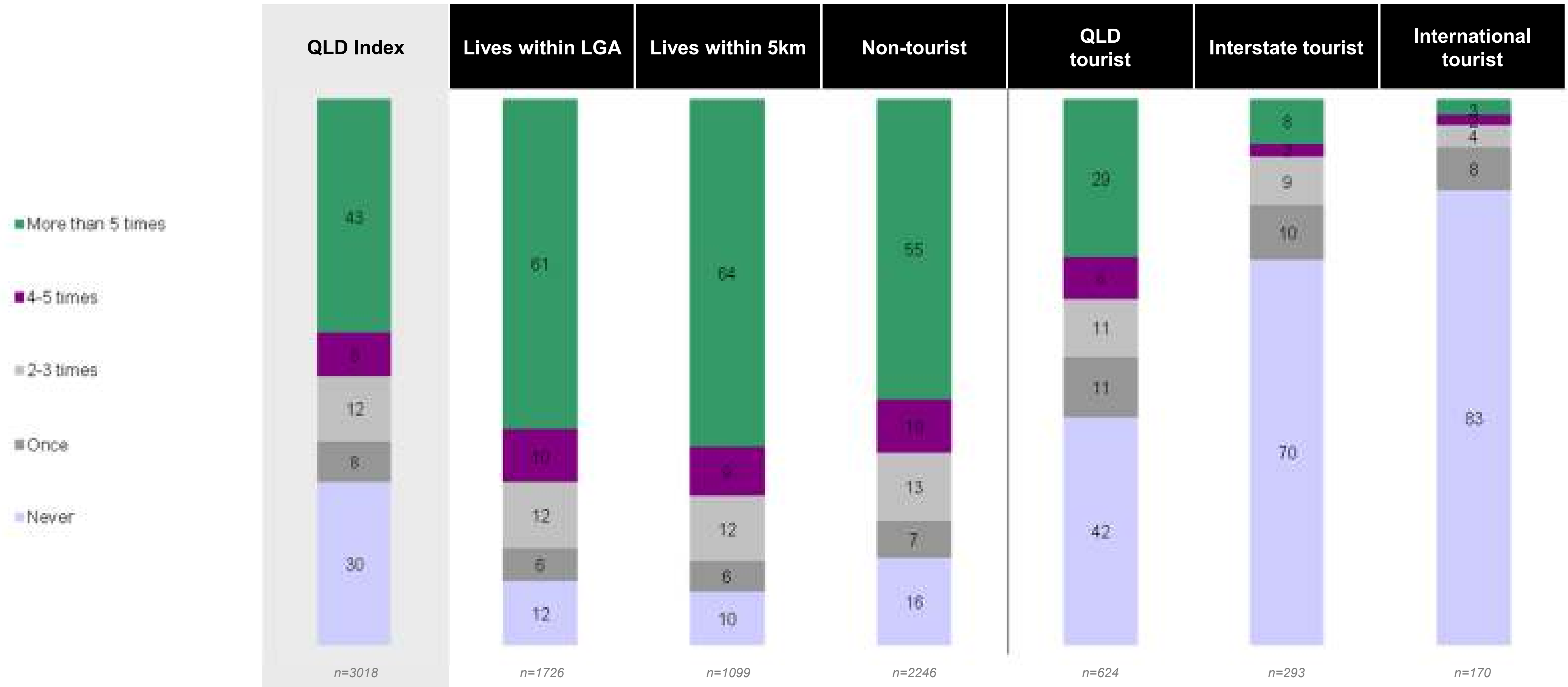
Q1. How many times have you visited the gallery before today?

Base: All visitors, valid responses only

Number of times visited

Breakdown by VISITOR ORIGINS

All figures are %

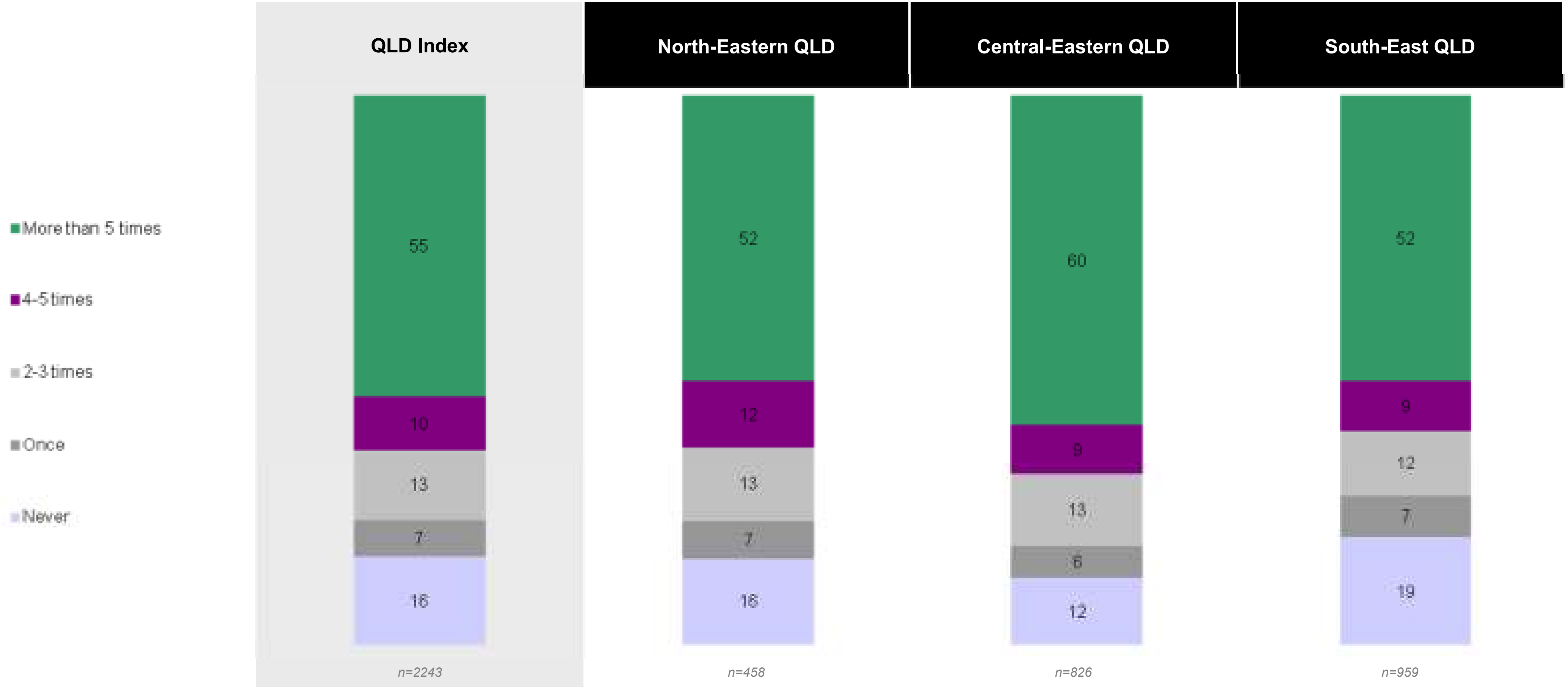


- Residential distance from the gallery has the greatest influence on the proportion of repeat and first-time visitors. Over 4 in 5 international tourists are first-time visitors.
- Around 2 in 3 domestic non-QLD tourists are first-time visitors.
- Living closer to the gallery increases the likelihood of visiting more than 5 times before (at least 50% for those within 5km or the LGA of the gallery).

Number of times visited

Breakdown by REGION – NON-TOURISTS ONLY

All figures are %



- Limiting the analysis to the non-tourists (ie: excluding tourists from the sample), the proportion of first-timers drops across regions to between 12-19% (or just over 1 in 8 visitors).

Q1. How many times have you visited the gallery before today?

Base: All non-tourist visitors, valid responses only

Number of times visited

Breakdown by AGE X GENDER – NON-TOURISTS ONLY

All figures are %

- Age has a correlation with the number of times a visitor has been to the gallery in the past.
- There are no substantial differences of gender, with men and women equally likely to be visiting the gallery the same number of times across age groups. The only exception being the over 45 females who are more likely than men to have visited the gallery more than 5 times in the past.

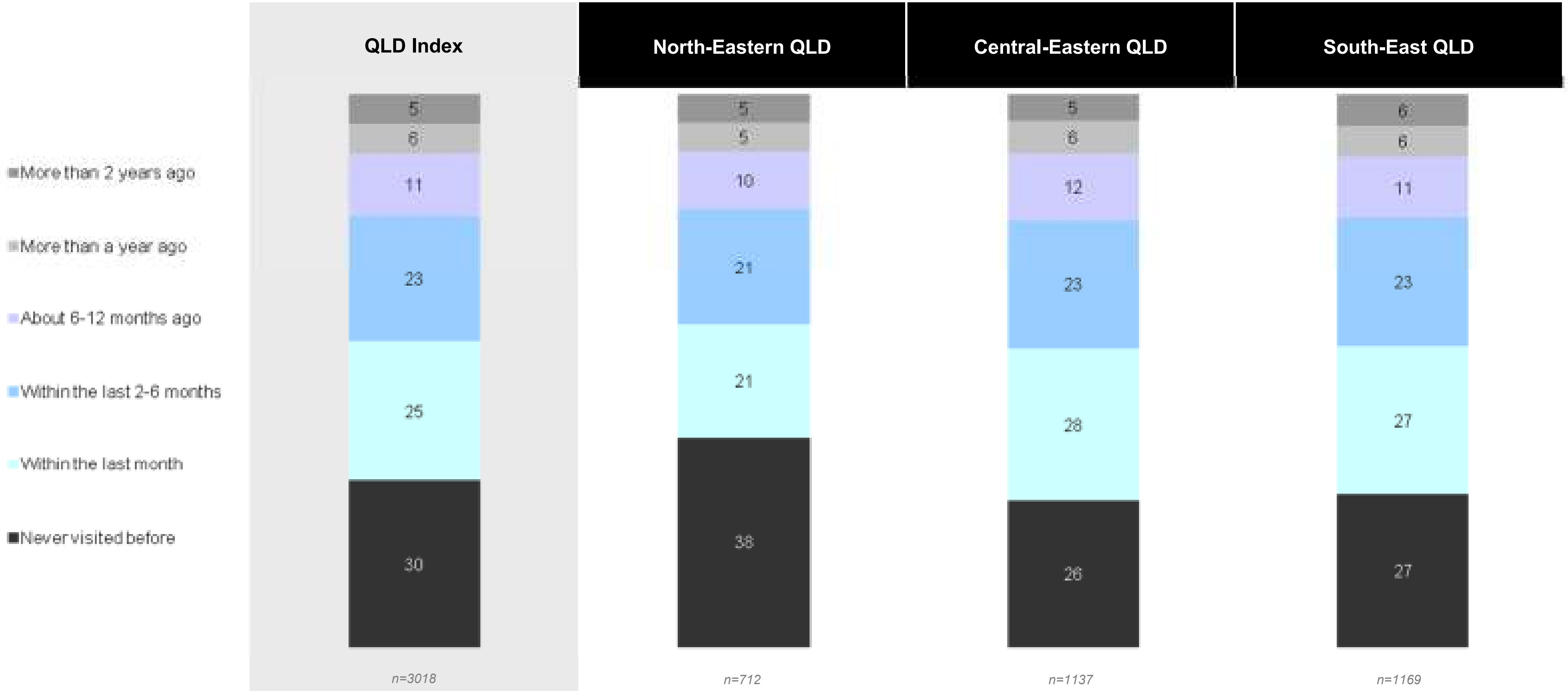
Q1. How many times have you visited the gallery before today?

Base: All non-tourist visitors, valid responses only

When last visited

Breakdown by REGION

All figures are %

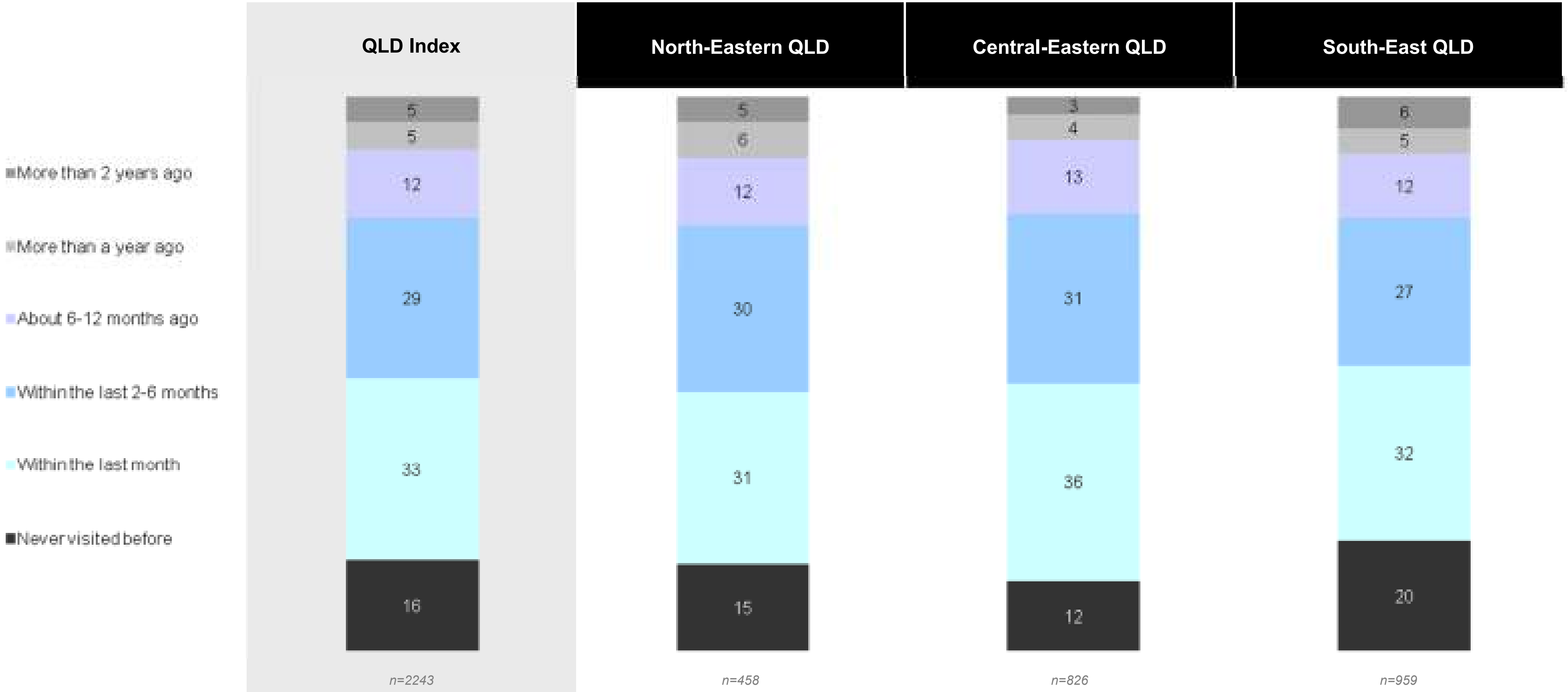


- Across regional profiles, of those who are repeat visitors to the gallery (ie: excluding those who have "never visited before") the majority (around two-thirds) are returning to the gallery within a six-month period.

When last visited

Breakdown by REGION – NON-TOURISTS ONLY

All figures are %



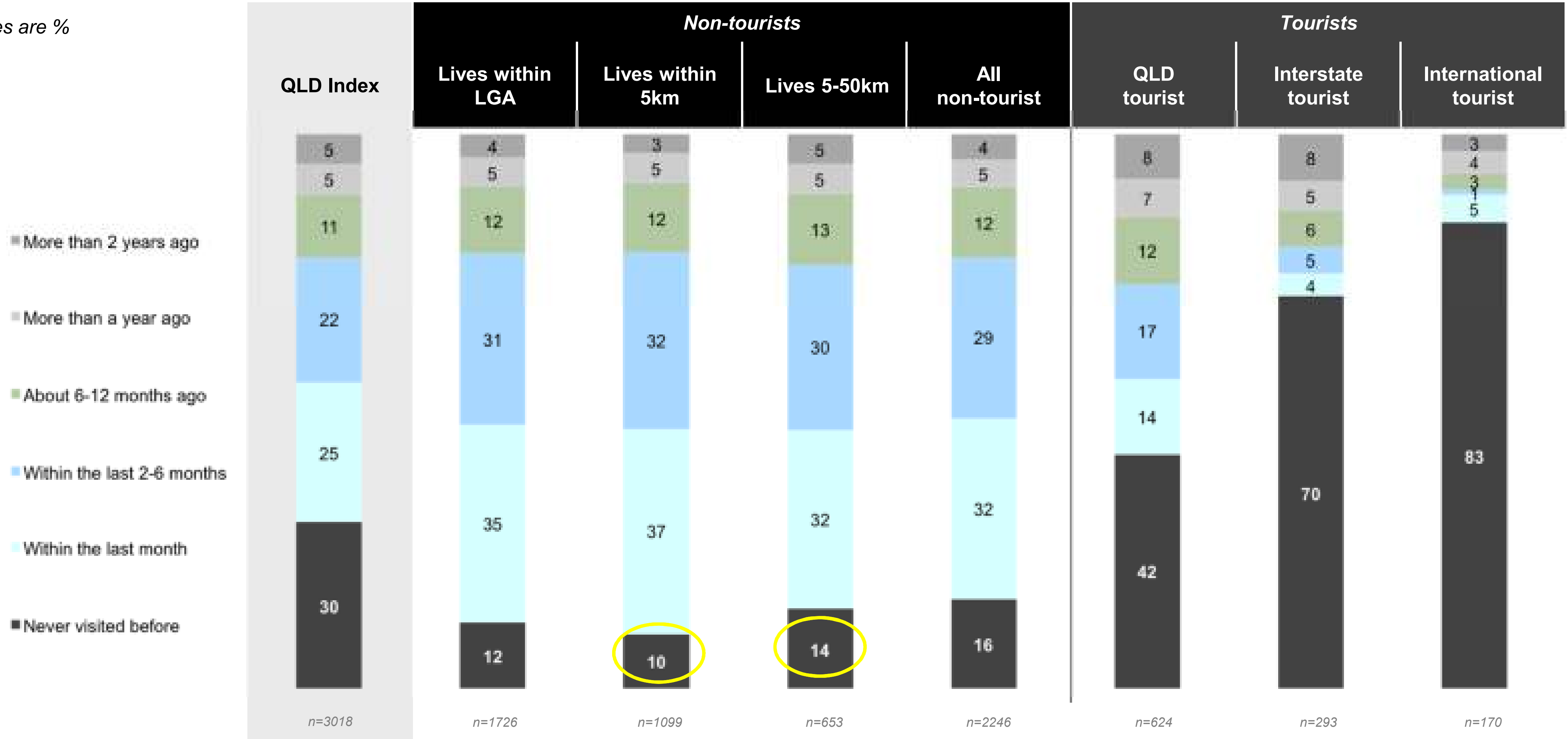
- Across regional profiles, the majority of local audience (around two-thirds) are returning to the gallery within a six-month period.

When last visited

museum & gallery SERVICES QUEENSLAND M&G NSW

Breakdown by VISITOR ORIGINS

All figures are %

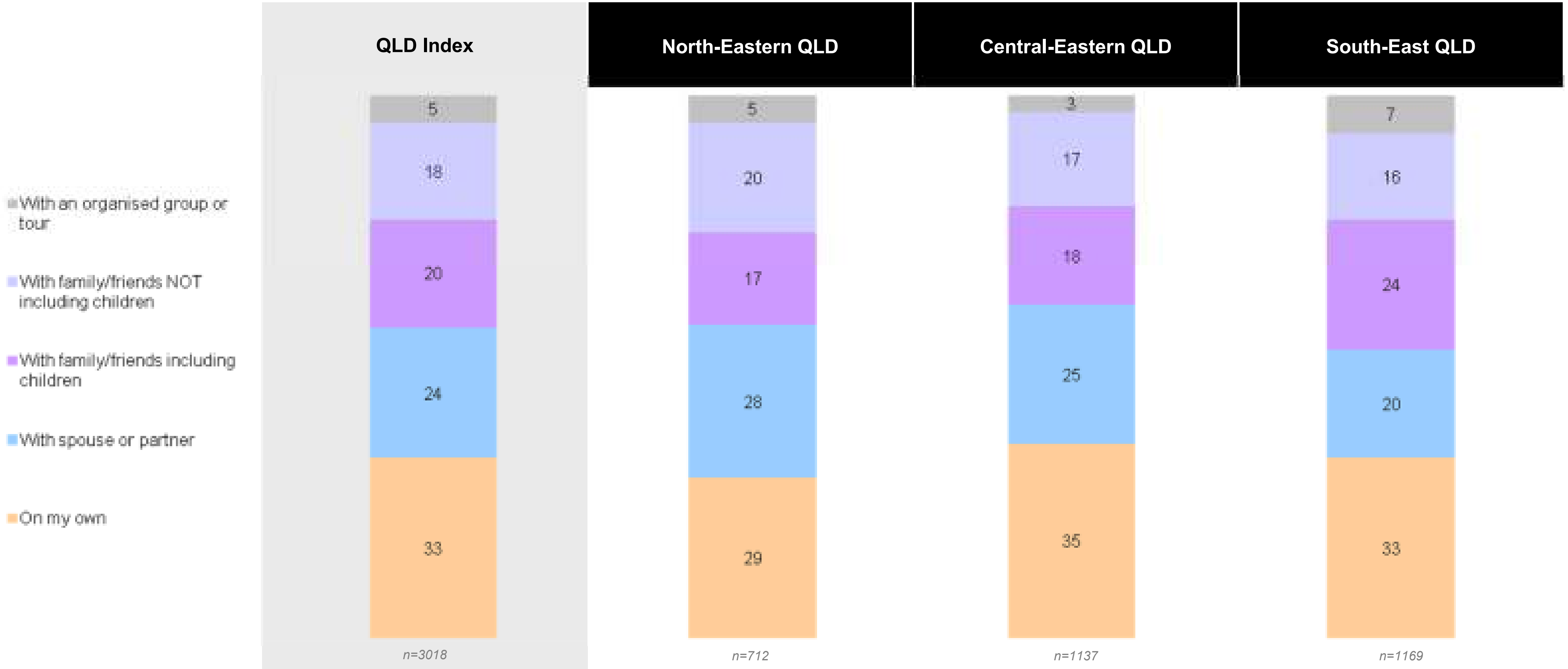


- Non-tourists who live more than 5km away from the gallery are more likely to be first-time visitors compared to those who live within 5km of the gallery.

Who visiting with

Breakdown by REGION

All figures are %



- The social arrangements do not differ widely by region, with around 1 in 3 visitors across regions visiting by themselves and around a quarter coming with a spouse/partner (consistent with NSW).
- *Note: A maximum of 2 visitors from any group or tour were surveyed in any particular group as part of the sampling methodology, so the absolute proportion of group/tour visitors may in fact be higher.*

Q3. Who are you visiting with today?

Base: All visitors, valid responses only

Who visiting with

Breakdown by AGE x GENDER

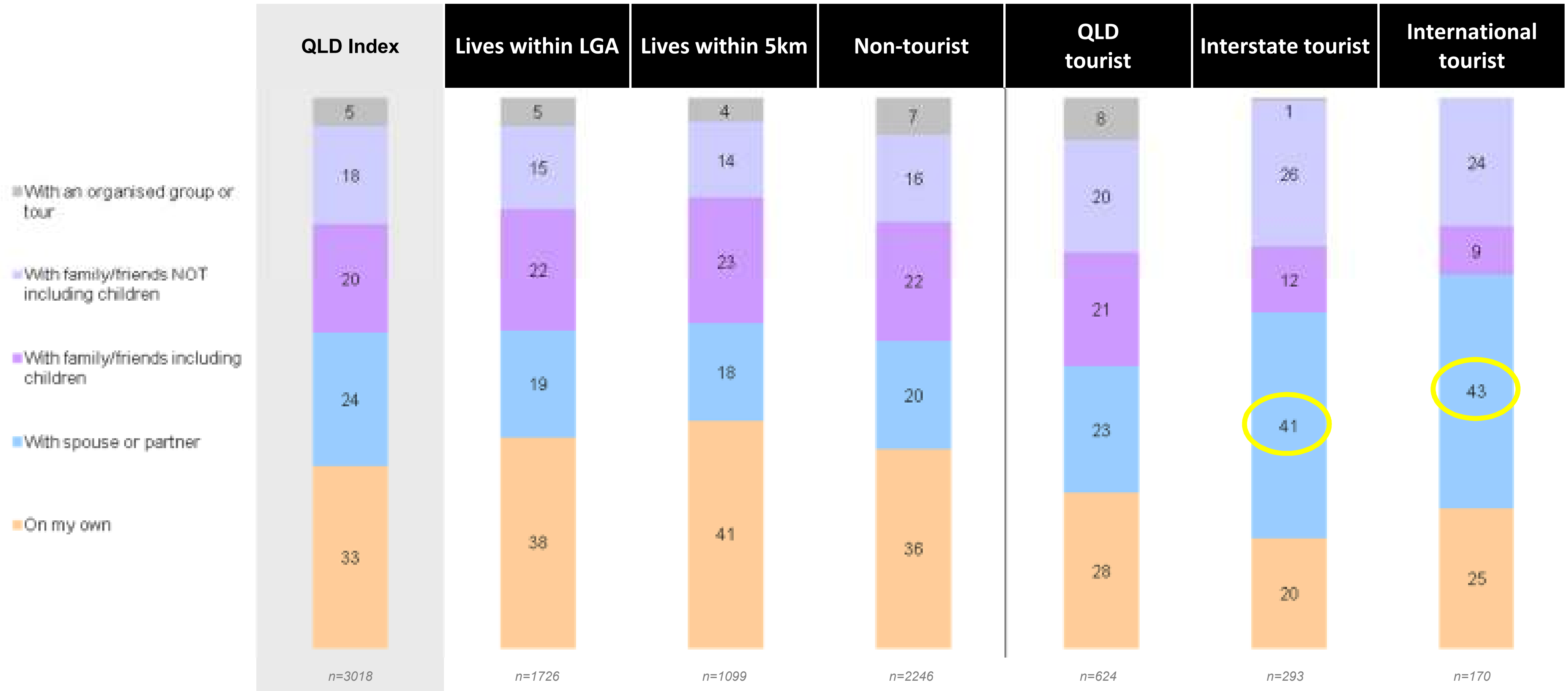
All figures are %

- Younger people are generally more likely to come to the gallery with friends or family not including children. Females under 25 are the most likely group to be visiting in this arrangement (36%).
- Men in general, at each age level respectively, are more likely to be coming along with a spouse or partner than women, and this effect is most pronounced in the older age brackets. This suggests that men are more likely to be coming because of a female spouse/partner than the converse.
- Men however are no less likely than their female counterparts to be coming on their own, and in fact for the under 45's men are more likely to be coming on their own to the gallery compared to their female peers of the same age group.

Who visiting with

Breakdown by VISITOR ORIGINS

All figures are %

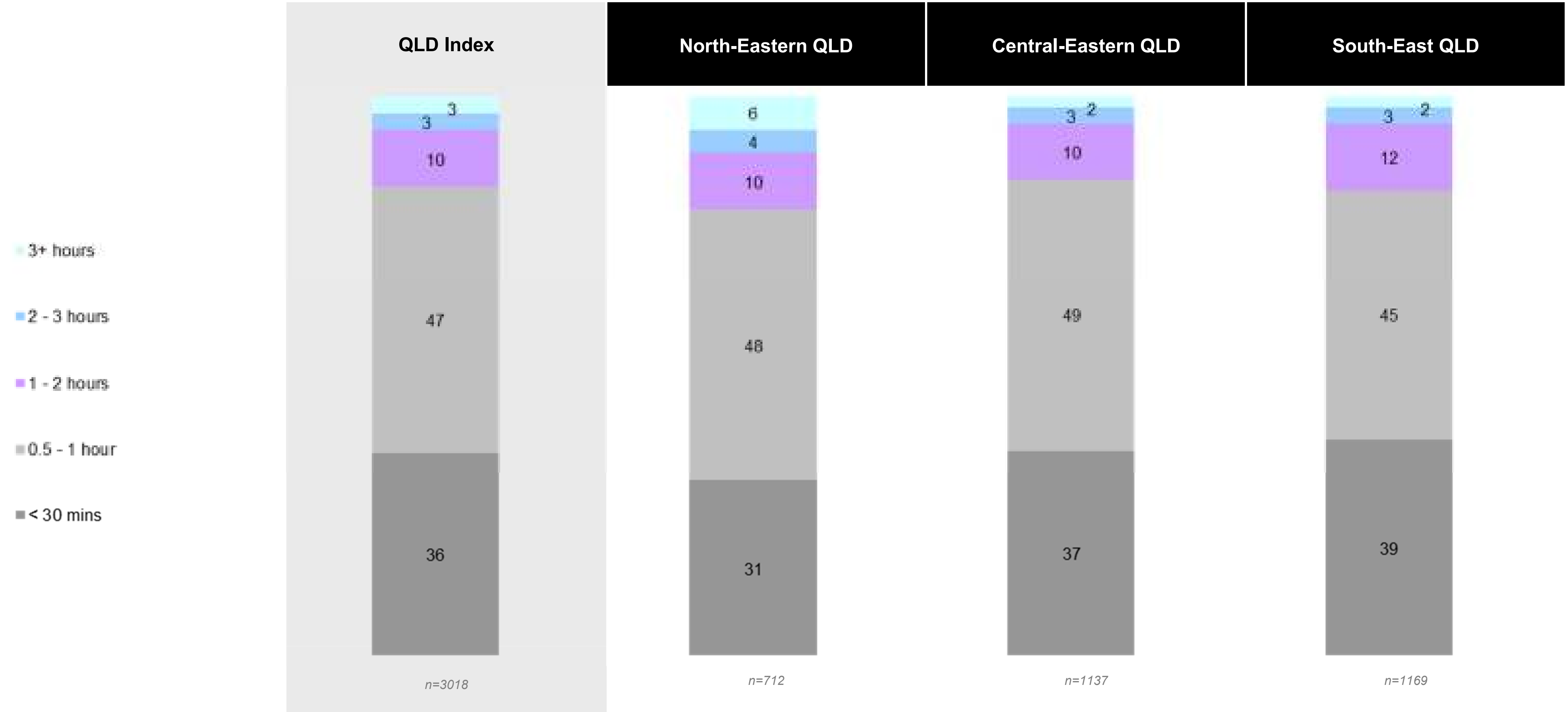


- Non-tourists are more likely to be visiting on their own compared to tourists.
- On the flip side, interstate and international tourists are more likely to be coming to the gallery with a spouse or partner compared to non-tourists.
- Those who live close to the gallery (within the LGA or within 5km) are more likely to visit the gallery by themselves than any other segment.

Length of visit

Breakdown by REGION

All figures are %



- Across the State, most visitors (83%) are spending less than an hour. This is fairly consistent across regions.

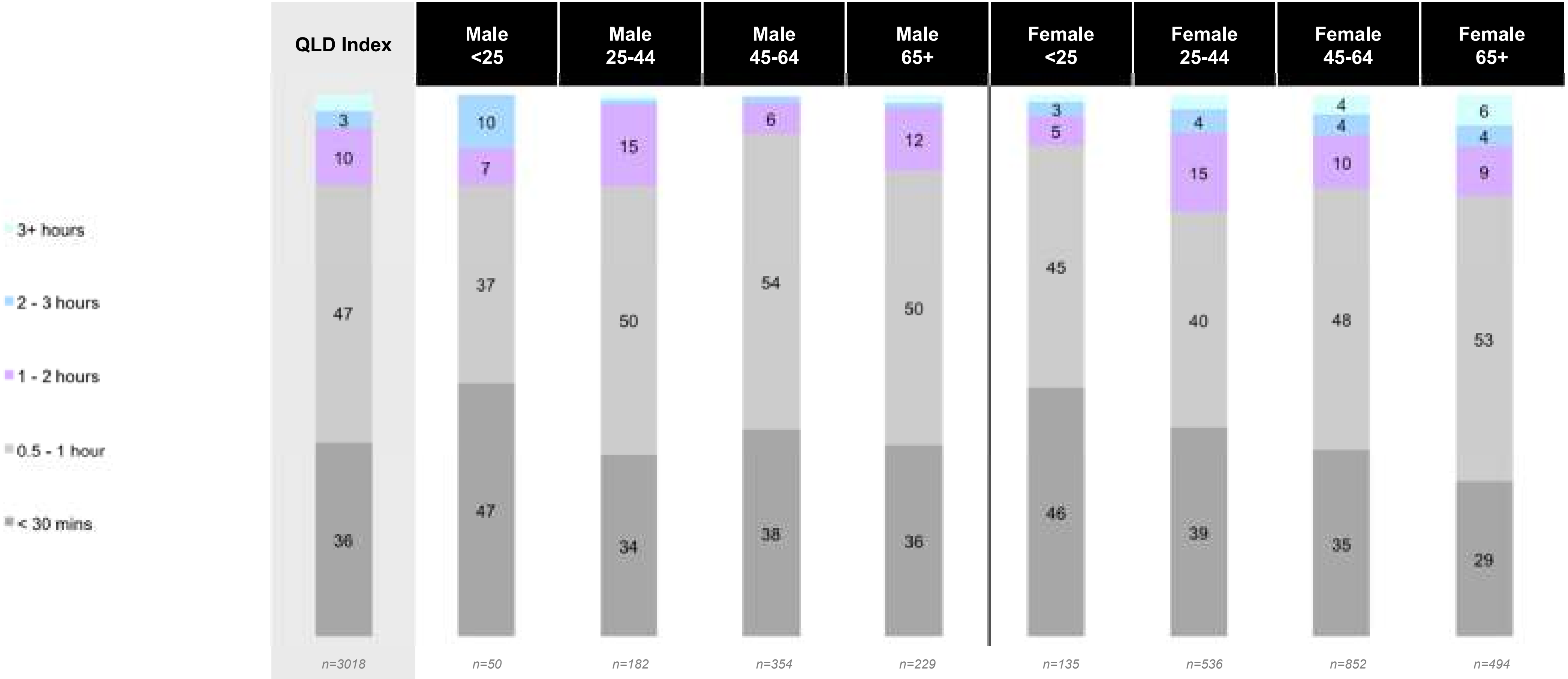
Q4. How long was your visit today?

Base: All visitors, valid responses only

Length of visit

Breakdown by AGE x GENDER

All figures are %

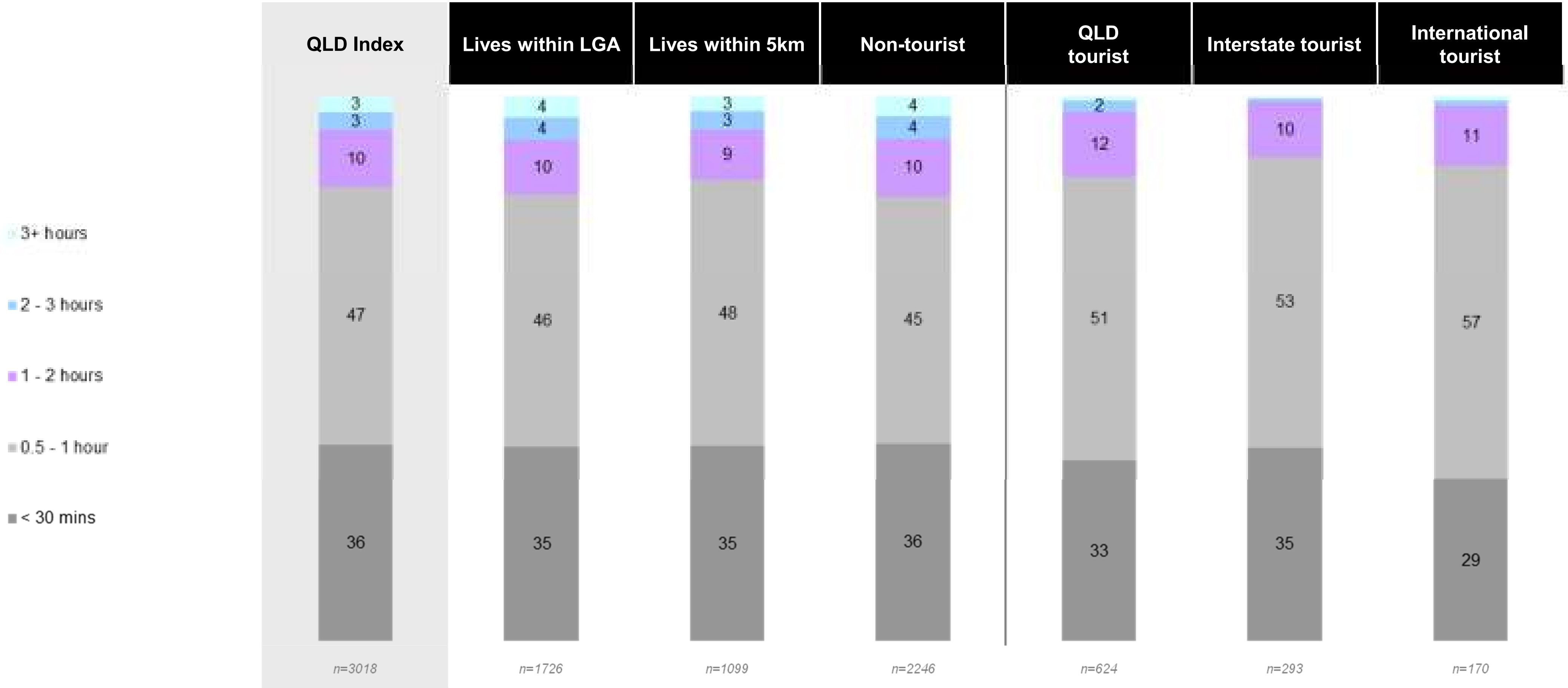


- Time spent in the gallery varies by age and by gender.
- Younger visitors (under 25) are on average spending less time in the gallery than older visitors.

Length of visit

Breakdown by VISITOR ORIGINS

All figures are %

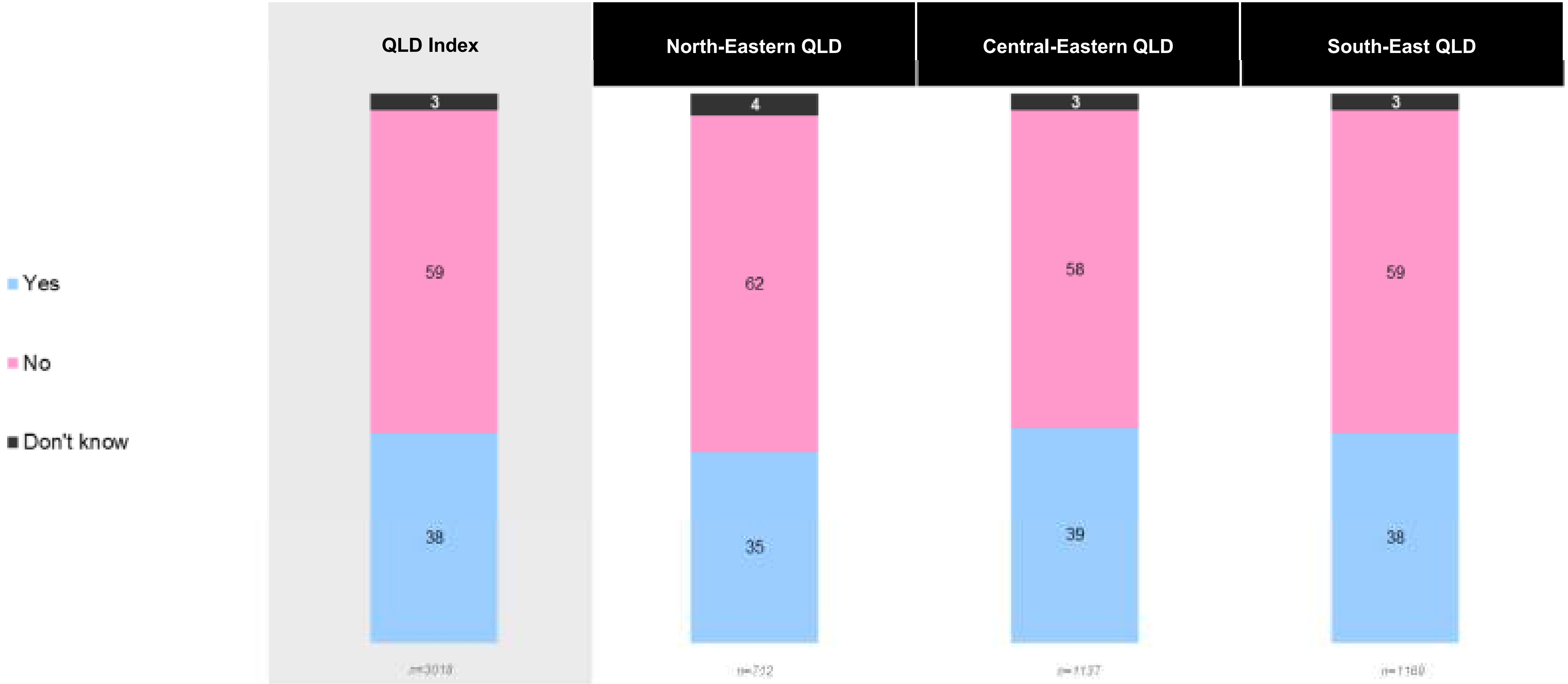


- Time spent in the gallery does not vary markedly by the type of visitor (tourist or non-tourist) with the majority of the tourist audience spending 30-60 minutes in the gallery.
- For most galleries it is the provision of additional services e.g. café, workshops that extends the visitor's stay.

Attendance at public program

Breakdown by REGION

All figures are %



- Attendance at public programs does not vary significantly across regions.

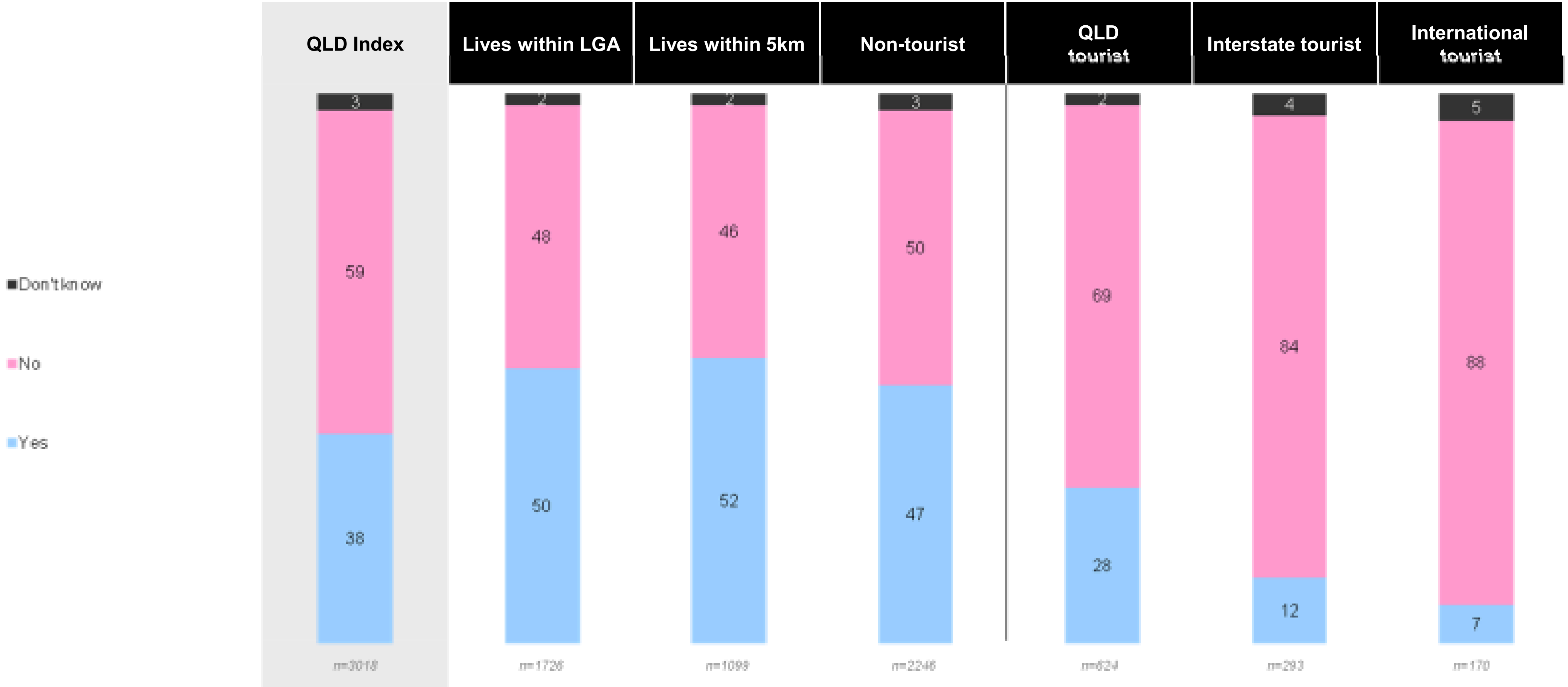
Q5. Have you or any member of your family ever been to a workshop, talk or group activity at this gallery before today?

Base: All visitors, valid responses only

Attendance at public program

Breakdown by VISITOR ORIGINS

All figures are %

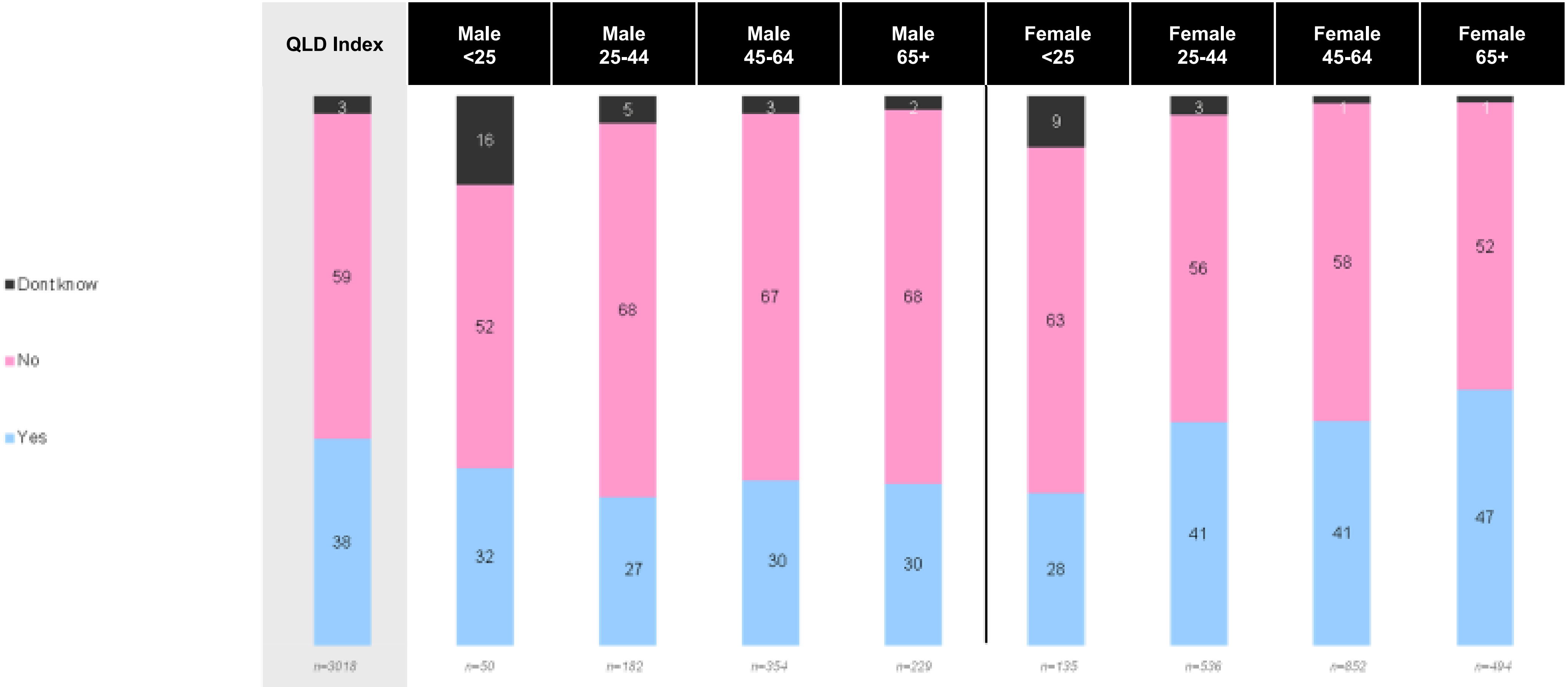


- Overall, the average QLD gallery has just over 1 in 3 of its visitors having attended a public program at the gallery before.
- Around 1 in 2 visitors who live within 5km of the gallery (or within the LGA) have attended a public program.
- Being a non-tourist, as expected, correlates with visitors more likely to have attended a public program at the gallery.

Attendance at public program

Breakdown by AGE X GENDER

All figures are %



- Age and gender play a role in past attendance at a public program.
- Women are more likely than men to have attended a public program at the gallery at some point, and older women are more likely to attend programs than younger women. On average 47% of women over 65 have attended a workshop talk or group activity at the respective gallery.
- Men and women under 25 are more evenly matched with respect to participating in a workshop/course.

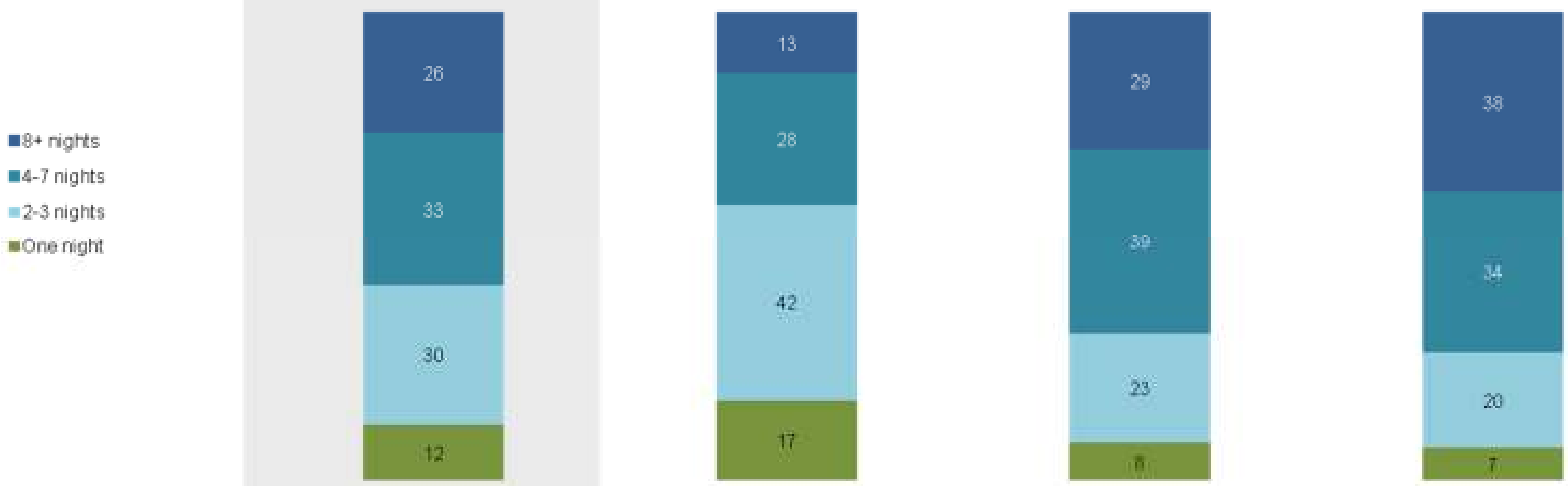
Q5. Have you or any member of your family ever been to a workshop, talk or group activity at this gallery before today? *Base: All visitors, valid responses only*

Tourist – length of stay in region

Breakdown by TOURIST TYPE

All figures are %

QLD Index	QLD tourist	Interstate tourist	International tourist



Who staying with?

	QLD Index	QLD tourist	Interstate tourist	International tourist
Home of friend or relative	**39%**	**46%**	**36%**	**33%**
Paid accommodation	**61%**	**54%**	**64%**	**67%**

- As expected, international tourists are most likely to be spending more than a week.
- However, the type of accommodation (friend or hotel) is relatively consistent across tourist type, except the QLD tourists who are more likely than interstate or international tourists to be staying with friends or relatives.
- Recent ABS data (8035.04 *Tourist Accommodation*) identifies the average length of stay in Queensland establishments with more than 15 rooms as 2.5 nights.

Q22. If you are a visitor to the region – how long are you staying in the area? &
Q23. Are you staying in paid accommodation?

Base: All visitors, valid responses only

museum & gallery SERVICES QUEENSLAND

Information & Marketing

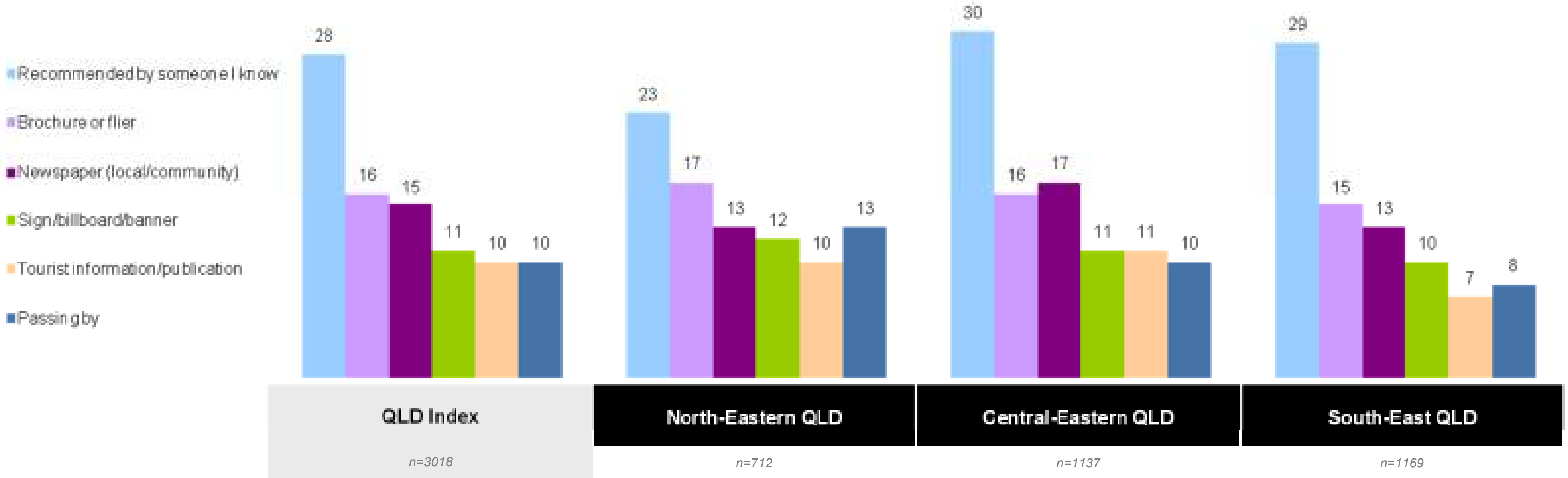
Image courtesy of Artspace Mackay

Museums & Galleries NSW

Source of information

Breakdown by REGION – Top 6 (overall) sources of information

All figures are %



- Across regions in QLD, "word of mouth" is the most common source of information about the average gallery.
- For the major sources of information, there does not appear to be a regional impact on their relative influence.
- A full list of the Source of Information is shown overleaf by region.

Source of information

Breakdown by REGION - Most cited

All figures are %

Key differences highlighted in yellow	QLD Index	North-Eastern QLD	Central-Eastern QLD	South-East QLD
	n=3018	*n=712*	*n=1137*	*n=1169*
Word of mouth	28	23	30	29
Brochure or flier	16	17	16	15
Newspaper (local/community)	15	13	17	13
Sign/billboard/banner	11	12	11	10
I was passing by	10	13	10	8
Tourist information/publication	10	10	11	7
Information on Internet	8	9	9	7
By invitation or free ticket	7	7	6	7
Poster	4	8	3	3
Newspaper (major metropolitan)	4	4	3	4
I live locally	3	2	3	4
Radio	2	4	3	1
I'm a regular visitor (I visit often, regularly visit exhibits)	2	1	2	2
I drive by (drove past)	2	1	1	2

- The local newspaper is having a far greater influence than the major metro newspapers.
- 1 in 10 visitors cite the Internet as a source of information on the gallery.

Q6. How did you hear about this gallery or this exhibition? *Base: All visitors, valid responses only*

Source of information

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	QLD Index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-34	Female 45-64	Female 65+
	n=3018	n=186	n=50	n=182	n=354	n=229	n=135	n=536	n=852
Recommended by someone I know	26	33	24	25	24	29	26	29	33
Brochure or flier	15	14	15	11	16	13	16	17	17
Newspaper (local/community)	14	2	6	12	17	9	11	19	20
Sign/billboard/banner	10	10	12	11	14	10	11	12	9
I was passing by	10	14	16	14	6	18	12	8	7
Tourist information/publication	9	15	10	12	15	15	6	9	8
Information on Internet	8	8	10	5	6	8	11	9	6
By invitation or free ticket	6	5	5	5	8	6	5	7	8
Poster	4	5	5	4	4	7	6	3	3
Newspaper (major metropolitan)	3	1	6	4	6	3	2	4	3
I live locally	3	0	1	4	4	0	3	3	5
Radio	2	0	3	2	2	3	1	3	3

- Across age groups, "word of mouth" is still a dominant force, but the under 25 males are particularly influenced by word of mouth compared to other demographics.
- Older visitors over 65 are the age group most likely to be influenced by the local newspaper and brochures/fliers/printed materials, and the least likely to be just "passing by".
- The Internet is not limited to just young people – visitors across the age brackets are using the Internet.
- Under 45's are more likely than over 45's to be influenced by posters.

Source of information

Breakdown by VISITOR ORIGINS

All figures are %

Key differences highlighted in yellow	QLD Index	Lives within LGA	Lives within 5km	All non-tourist	QLD tourist	Interstate tourist	International tourist
	n=3018	*n=1726*	*n=1099*	*n=2246*	*n=624*	*n=293*	*n=170*
Word of mouth	28	29	30	29	32	20	20
Brochure or flier	16	19	20	18	13	10	7
Newspaper (local/community)	15	20	23	18	9	6	5
Sign/billboard/banner	11	9	10	9	11	17	17
I was passing by	10	8	9	8	10	15	25
Tourist information/publication	10	6	6	7	9	20	23
Information on Internet	8	9	7	10	7	6	3
By invitation or free ticket	7	8	8	8	7	2	3
Poster	4	5	5	5	3	3	4
Newspaper (major metropolitan)	4	5	6	4	3	1	0
I live locally	3	5	5	4	3	1	1
Radio	2	3	3	3	2	0	0

- "Word of mouth" is a dominant influencer across tourist types.
- Brochures/fliers are connecting with non-tourists the most (18%) and international tourists the least (5%). The reverse is true of signs/billboards/banners which are most likely to be influencing international tourists (17%) and less likely to be influencing non-tourists (9%).
- Intrastate tourists (i.e.: QLD tourists) are not being greatly influenced by tourist publications (9%), compared to the interstate and international tourists (at 20-23%).
- "Just passing by" is also a more likely influencer for international tourists (25%).

Q6. How did you hear about this gallery or this exhibition?

Base: All visitors, valid responses only

Source of information

Breakdown by REGION – NON-TOURISTS ONLY

All figures are %

Key differences highlighted in yellow	QLD Index	North-Eastern QLD	Central-Eastern QLD	South-East QLD
	n=2243	*n=458*	*n=826*	*n=959*
Recommended by someone I know	29	28	31	28
Brochure or flier	18	22	19	16
Newspaper (local/community)	18	20	21	14
Information on Internet	10	12	11	8
Sign/billboard/banner	9	8	9	9
By invitation or free ticket	8	9	8	9
I was passing by	8	8	8	8
Tourist information/publication	7	8	7	5
Poster	5	9	4	3
Newspaper (major metropolitan)	5	6	4	5
I live locally	4	3	4	5
Radio	3	6	3	1

- Amongst non-tourists, tourist information is still a common source of information, for just under 1 in 10 visitors, consistent across regions.
- Local newspapers are important in all regions.

Q6. How did you hear about this gallery or this exhibition? *Base: All non-tourists, valid responses only*

Source of information

Breakdown by REGION – FIRST-TIME VISITORS & NON-TOURIST

All figures are %

Key differences highlighted in yellow	QLD Index	North-Eastern QLD	Central-Eastern QLD	South-East QLD
	n=360	*n=68*	*n=101*	*n=191*
Recommended by someone I know	30	29	34	29
Sign/billboard/banner	11	14	13	8
Tourist information/publication	10	21	10	4
I was passing by	9	9	7	10
Brochure or flier	8	8	6	10
Newspaper (local/community)	8	13	14	3
I drive by (drove past)	7	3	6	9
Information on Internet	6	7	8	5
Poster	5	11	2	5
By invitation or free ticket	5	7	4	4
Newspaper (major metropolitan)	4	5	3	5
School group/excursion (with school, school workshop etc)	3	0	1	5
Radio	2	5	2	1

- Amongst the local first-time visitors, tourist information still plays a key role, particularly in North-Eastern QLD. *Smaller base size n=68.*

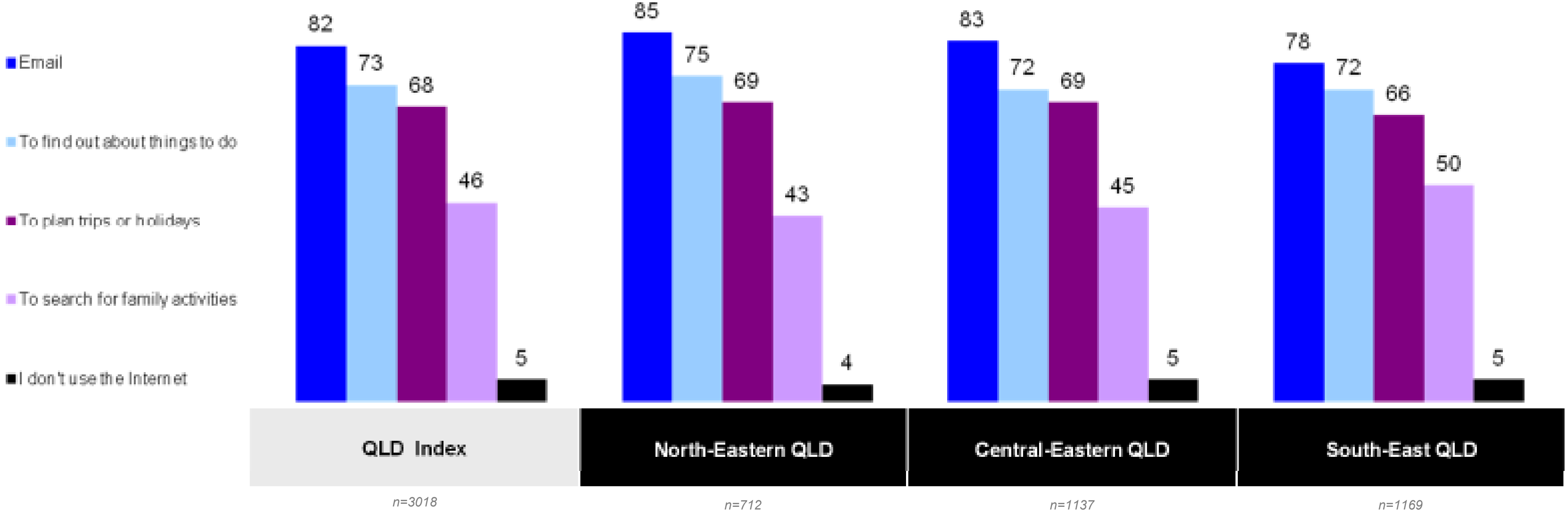
Q6. How did you hear about this gallery or this exhibition?

Base: All first-time visitors who are also non-tourists, valid responses only

Internet use

Breakdown by REGION

All figures are %



- Gallery-goers in public galleries in QLD appear to be strong users of the Internet, with at least 95% reporting they use the Internet in some way.
- Recent ABS statistics (81460 *Household Use of Information Technology Australia 2010-2011*) reports 79% of households have access to the Internet.
- Across regions in QLD, we see a consistently high use of the Internet to find out about things to do (around 3 in 4 visitors).

Internet use

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	QLD Index	Male < 25	Male 25-34	Male 45-64	Male 65+	Female < 25	Female 25-34	Female 45-64	Female 65+
	n=3018	n=50	n=182	n=354	n=229	n=135	n=536	n=852	n=494
Email	82	72	84	80	72	87	89	83	68
To find out about things to do	73	75	81	74	57	80	85	74	51
To plan trips or holidays	68	56	77	67	56	64	76	71	51
To search for family activities	46	30	60	44	26	43	67	46	27
I don't use the Internet	5	4	4	5	17	1	2	5	13

- Internet use does not appear to vary markedly between the genders, but it does by age.
- The over 65's have the highest proportion of visitors who don't use the Internet (around 13-17%), but this still leaves over 80% of over 65's who do use it.
- Around three-quarters of visitors under 64 are using the Internet to find out about things to do. At least half the over 65's are using the Internet for a similar purpose.

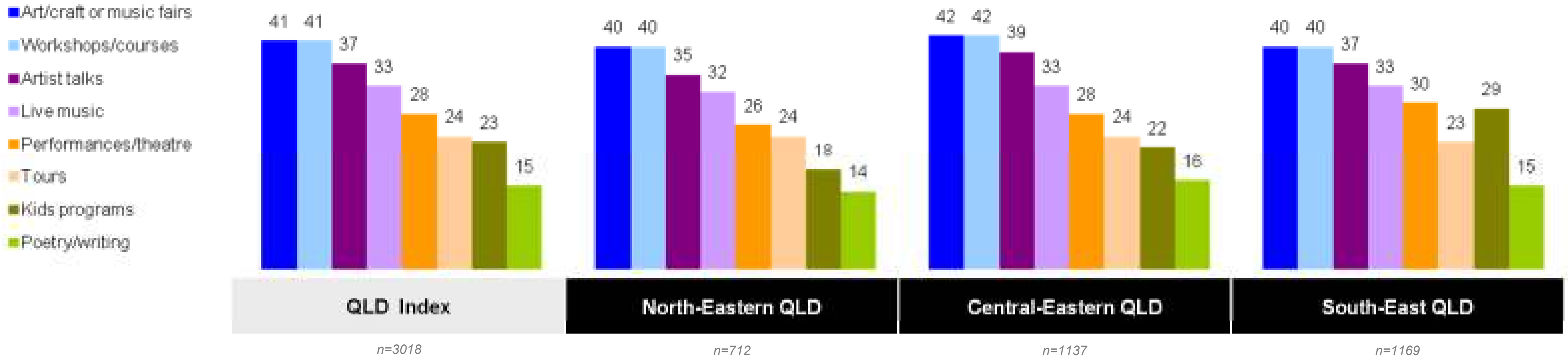
Visitor Preferences & Attitudes

Image courtesy of Ipswich Art Gallery

Program/Workshop Interest

Breakdown by REGION

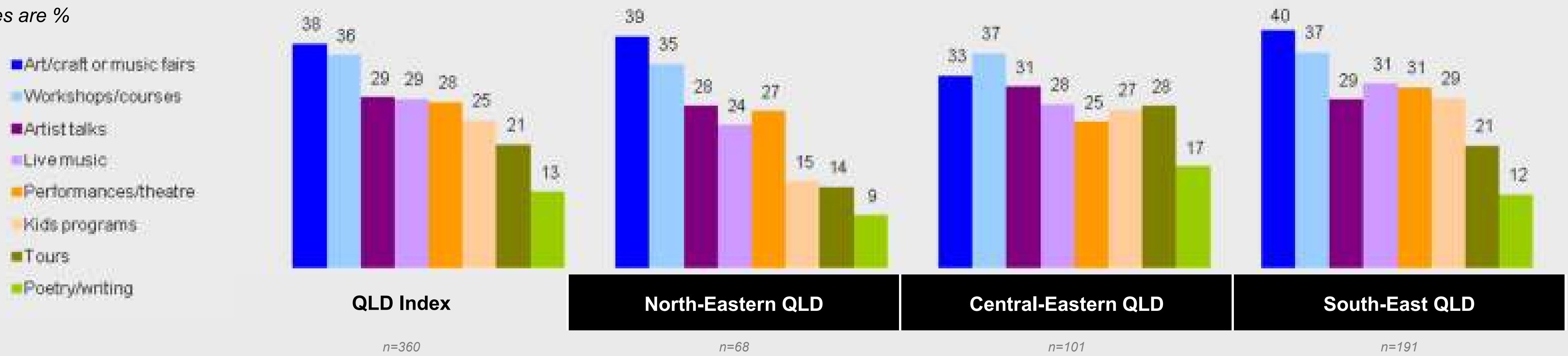
All figures are %



- Across regions, fairs and courses are the most frequently cited public programs audiences would like to attend at their gallery.
- Amongst the first-time visitors who are non-tourists, a similar pattern exists.

Breakdown by REGION – FIRST TIME VISITORS ONLY & NON-TOURISTS

All figures are %



Q7. Programs/workshops you and your family would like to attend?

Base: See filters above, valid responses only

Program/Workshop Interest

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	QLD Index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n=3018	n=50	n=182	n=354	n=229	n=135	n=536	n=852	n=494
Art/craft or music fairs	41	31	35	28	26	56	51	46	36
Workshops/courses	41	52	37	27	25	52	51	46	33
Artist talks	37	33	31	36	39	35	30	42	40
Live music	33	46	41	30	22	52	38	32	28
Performances/theatre	28	28	31	23	16	43	34	28	27
Tours	24	27	23	22	23	25	21	24	28
Kids programs	23	10	37	15	7	22	52	18	11
Poetry/writing	15	18	19	12	5	20	18	18	13

- Amongst the key demographics, younger people under 25 are most interested in workshops/courses and live music events at the gallery.
- Performance/theatre also generates more interest amongst younger audience members (under 44's) than older audience members (over 45's).
- Women under 45 are interested in both the art/craft fairs and workshops/courses.

Q7. Programs/workshops you and your family would like to attend?

Base: All visitors, valid responses only

Program/Workshop Interest

Breakdown by VISITOR TYPE

All figures are %

Key differences highlighted in yellow	QLD Index	Lives within LGA	Lives within 5km	Non-tourist	QLD tourist	Interstate tourist	International tourist
	n=3018	n=1726	n=1099	n=2246	n=624	n=293	n=170
Art/craft or music fairs	41	48	48	47	35	20	27
Workshops/courses	41	48	45	46	34	23	26
Artist talks	37	41	40	40	31	33	28
Live music	33	37	39	35	28	23	29
Performances/theatre	28	34	33	32	24	18	17
Tours	24	24	26	24	24	23	22
Kids programs	23	28	29	27	21	13	7
Poetry/writing	15	18	18	17	13	8	14

- Non-tourists are more likely than tourists to express interest in a program/workshop.
- Interestingly, both tourists and non-tourists show an equal preference for “tours”.

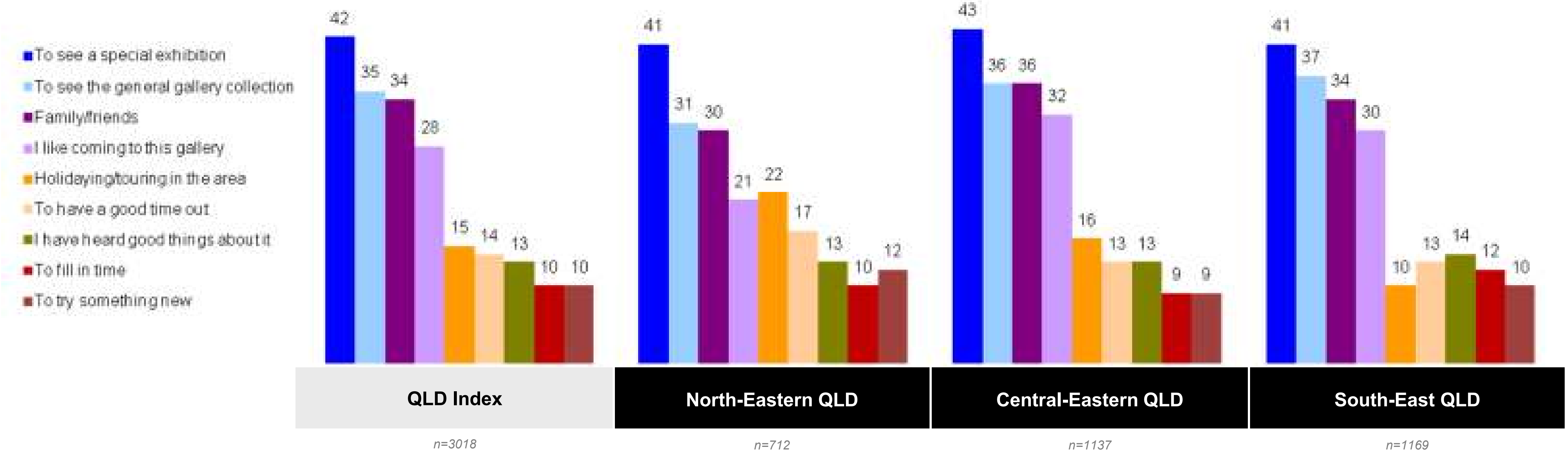
Q7. Programs/workshops you and your family would like to attend?

Base: All visitors, valid responses only

Motivations for coming

Breakdown by REGION – top 9 drivers shown

All figures are %



- Special exhibitions are the driving force for audiences to public galleries across QLD in the various regions. The general collections are not far behind as a key motivator.
- Family and friends can also be a strong motivator to come to the gallery.
- Holidaying/touring was strongest for North-Eastern QLD (22%) compared to the other regions.

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Motivations for coming

Breakdown by REGION

All figures are %

Key differences highlighted in yellow	QLD Index	North-Eastern QLD	Central-Eastern QLD	South-East QLD
	n=3018	*n=712*	*n=1137*	*n=1169*
To see a special exhibition	42	41	43	41
To see the general gallery collection	35	31	36	37
Family/friends	34	30	36	34
I like coming to this gallery	28	21	32	30
Holidaying/touring in the area	15	22	16	10
To have a good time out	14	17	13	13
I have heard good things about it	13	13	13	14
To fill in time	10	10	9	12
To try something new	10	12	9	10
For study purposes/self-education	8	7	9	8
Attend an event/activity/performance	7	7	6	8
The reputation of the artist/s and/or exhibition	7	7	8	7
To visit the gallery shop	7	9	7	5
To visit the café	4	7	1	4
As part of an organised group excursion/tour	3	2	2	4

Only values over 1% shown.

Motivations for coming

Breakdown by WHO VISITING WITH

All figures are %

Key differences highlighted in yellow	QLD Index	On my own	Spouse or partner	Family/friends including children	Family/friends not including children	Organised group or tour
	n=3018	*n=985*	*n=731*	*n=617*	*n=518*	*n=152*
To see a special exhibition	42	44	42	37	47	34
To see the general gallery collection	35	37	45	27	28	24
Family/friends	34	2	37	36	25	14
I like coming to this gallery	28	38	25	26	23	11
Holidaying/touring in the area	15	10	29	9	19	4
To have a good time out	14	12	11	21	14	12
I have heard good things about it	13	16	12	11	13	10
To fill in time	10	14	7	11	9	1
To try something new	10	9	10	13	9	10
For study purposes/self-education	8	12	5	6	4	12
Attend an event/activity/performance	7	8	2	11	2	26
The reputation of the artist/s and/or exhibition	7	8	7	5	8	7
To visit the gallery shop	7	10	5	4	7	5
To visit the café	4	2	3	3	6	6
As part of an organised group excursion/tour	3	3	3	2	2	7

- Those coming on their own are most likely to state "I like coming to this gallery", suggesting this type of visitor enjoys regular visits to the gallery. They are also the group most likely to come to "fill in time".
- Groups are most likely to be coming for a special event, activity or performance.

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Motivations for coming

Breakdown by AGE X GENDER

All figures are %

Key differences highlighted in yellow	QLD Index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n=3018	*n=50*	*n=182*	*n=354*	*n=229*	*n=135*	*n=536*	*n=852*	*n=494*
To see a special exhibition	43	25	34	42	44	30	36	48	50
To see the general gallery collection	36	33	39	40	45	36	30	35	34
Came with family	35	35	42	31	29	35	46	34	29
I like coming to this gallery	29	21	25	31	32	17	22	31	35
Holidaying/touring in the area	16	16	19	19	23	20	12	15	14
To have a good time out	14	16	24	13	5	27	20	12	9
I have heard good things about it	13	9	12	13	15	15	14	12	15
To fill in time	10	15	12	13	9	21	13	9	5
To try something new	10	16	15	12	6	18	13	8	8
For study purposes/self-education	8	8	7	9	5	12	7	8	9
The reputation of the artist/s and/or exhibition	8	3	8	7	5	9	5	9	11
Attend an event/activity/performance	7	2	5	2	7	3	12	8	6
To visit the gallery shop	7	5	7	4	4	10	9	8	6
To visit the café	4	6	5	1	3	5	3	4	5
As part of an organised group excursion/tour	3	0	1	2	1	2	4	3	3

- The under 25's are the most likely demographic to be motivated by the "restorative" benefits of coming to the gallery (i.e.: de-stressing and having a good time) or to "fill in time'.

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Motivations for coming

Breakdown by VISITOR ORIGINS

All figures are %

Key differences highlighted in yellow	QLD Index	Lives within LGA	Lives within 5km	Non-tourist	QLD tourist	Interstate tourist	International tourist
	n=3018	n=1726	n=1099	n=2246	n=624	n=293	n=170
To see a special exhibition	42	48	50	47	40	29	28
To see the general gallery collection	35	32	33	31	36	51	45
Came with family	34	35	37	34	36	37	22
I like coming to this gallery	28	36	39	33	25	13	8
Holidaying/touring in the area	15	1	1	2	23	56	59
To have a good time out	14	15	15	14	14	10	22
I have heard good things about it	13	15	16	14	13	9	7
To fill in time	10	11	11	10	10	9	12
To try something new	10	9	9	9	10	11	18
For study purposes/self-education	8	8	8	8	7	7	11
Attend an event/activity/performance	7	9	8	9	6	2	1
The reputation of the artist/s and/or exhibition	7	9	8	9	8	2	3
To visit the gallery shop	7	6	7	6	9	5	7
To visit the café	4	4	4	4	3	3	1
As part of an organised group excursion/tour	3	2	2	3	4	0	1

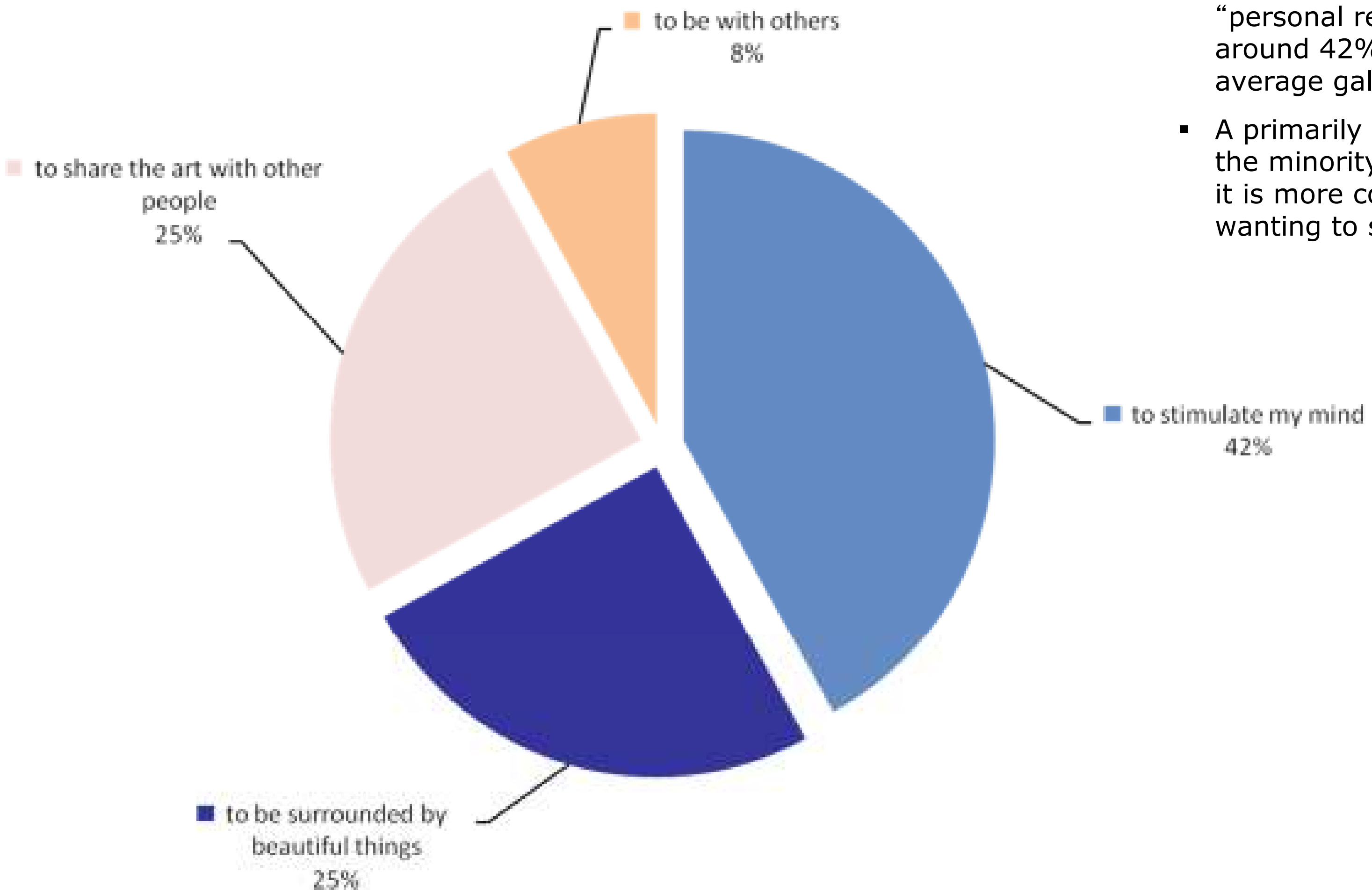
- On average international and interstate tourists are driven to see the general collection more than they are by a special exhibition.
- The reverse of this is true for local residents and QLD tourists.

Q9. What were the three main reasons you came to the gallery or exhibition today? *Base: All visitors, valid responses only*

Personal Reason for Visiting Gallery

- *Note: This is a forced-choice question and is a rough means of scoping the relative size of preliminary "segments" of visitors.*

"I come to the gallery….

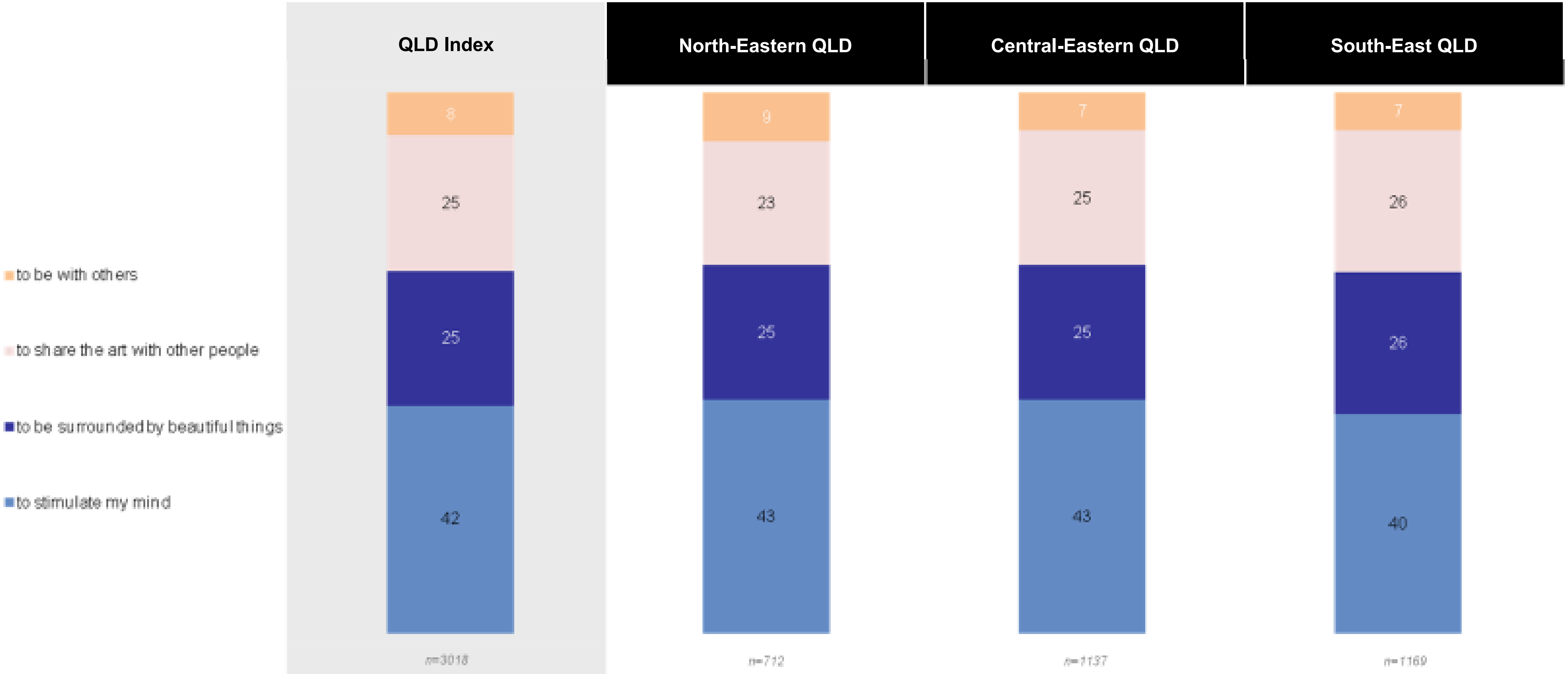


- "Stimulating my mind" was the most popular "personal reason" for coming to the gallery (at around 42% of visitors of this type in the average gallery).
- A primarily social visitor (to be with others) is in the minority (at 8%). From a social perspective, it is more common (at 25%) for visitors to be wanting to share art with other people.

Personal Reason for Visiting Gallery

Breakdown by REGION

All figures are %



- "Personal reason for visiting" does not vary markedly between regions.

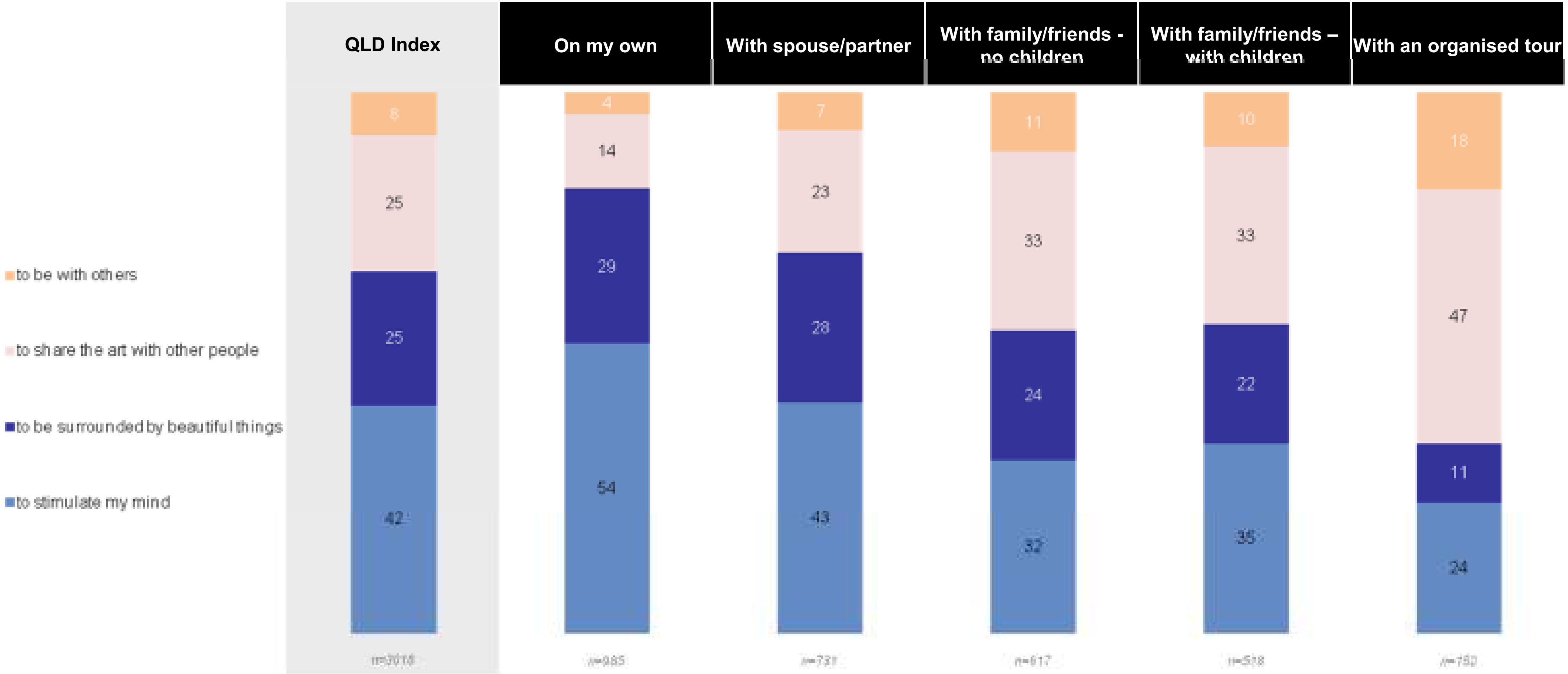
Q8. Which of the following best describes you..?

Base: All visitors, valid responses only

Personal Reason for Visiting Gallery

Breakdown by REGION

All figures are %



- The social grouping of the audience attending the gallery appears to play a large role in terms of "primary reason" for visiting.
- "Coming on my own" correlates to "stimulating my mind" (54%), whereas coming with an organised group/tour is about "sharing art with others" (47%).

Interest in exhibition type

museum & gallery SERVICES QUEENSLAND
M&G NSW

Breakdown by REGION

All figures are %

Key differences highlighted in yellow

	QLD Index	North-Eastern QLD	Central-Eastern QLD	South-East QLD
	n=3018	*n=712*	*n=1137*	*n=1169*
Painting	79	75	79	82
Exhibitions of work by local artists	64	58	68	64
Sculpture	63	62	63	63
Celebrated works of art by well-known Australian artists	63	60	65	63
Photography	63	60	66	62
Drawing	61	58	62	62
Celebrated works of art by well-known international artists	53	50	56	52
Ceramics/glass	51	46	53	52
Textiles	43	37	48	44
Printmaking	40	40	41	39
Live theatre/dance/music performance	40	38	39	42
Social history exhibitions	38	37	40	37
Indigenous and/or Torres Strait Islander exhibitions	37	37	39	34
Exhibitions for children	34	26	38	37
Digital media arts/interactive media	32	34	32	30

- Across regions, “painting” is consistently the most popular exhibition type audiences would like to see.

Q21. What types of exhibitions would you most like to see at this gallery? *Base: All visitors, valid responses only*

Interest in exhibition type

Breakdown by AGE x GENDER

All figures are %

Key differences highlighted in yellow	QLD Index	Male < 25	Male 25-44	Male 45-64	Male 65+	Female < 25	Female 25-44	Female 45-64	Female 65+
	n=3018	*n=50*	*n=182*	*n=354*	*n=229*	*n=135*	*n=536*	*n=852*	*n=494*
Painting	79	68	74	82	88	76	79	83	85
Exhibitions of work by local artists	64	38	59	65	64	56	64	71	72
Sculpture	63	50	62	61	62	71	63	70	64
Photography	63	51	68	67	63	76	72	64	56
Celebrated works of art by well-known Australian artists	63	35	54	61	64	54	59	73	73
Drawing	61	48	60	64	58	62	63	66	64
Celebrated works of art by well-known international artists	53	32	49	50	51	53	51	61	60
Ceramics/glass	51	34	38	40	39	48	49	64	61
Textiles	43	16	31	28	20	38	44	59	56
Live theatre/dance/music performance	40	39	41	30	26	56	47	44	39
Printmaking	40	39	38	34	28	40	40	49	41
Social history exhibitions	38	29	41	41	29	37	38	47	35
Indigenous and/or Torres Strait Islander exhibitions	37	23	37	35	26	36	37	47	33
Exhibitions for children	33	14	36	23	21	29	54	36	32
Digital media arts/interactive media	32	44	48	28	16	51	39	35	20

- Under 25's have a particular skew towards live performance and digital media arts, particularly amongst males under 45's, of whom nearly half are interested in this type of art form.

Q21. What types of exhibitions would you most like to see at this gallery? *Base: All visitors, valid responses only*

Interest in exhibition type

Breakdown by VISITOR TYPE

All figures are %

Key differences highlighted in yellow	QLD Index	Lives within LGA	Lives within 5km	Non-tourist	QLD tourist	Interstate tourist	International tourist
	n=3018	n=1726	n=1099	n=2246	n=624	n=293	n=170
Painting	79	84	84	79	81	82	71
Exhibitions of work by local artists	64	70	71	65	63	64	53
Celebrated works of art by well-known Australian artists	63	70	71	65	62	61	47
Sculpture	63	69	68	65	65	58	50
Photography	63	69	67	64	63	59	61
Drawing	61	68	66	63	63	59	47
Celebrated works of art by well-known international artists	53	61	62	56	51	47	37
Ceramics/glass	51	58	57	54	53	48	30
Textiles	43	48	47	45	45	44	26
Printmaking	40	45	43	42	40	35	26
Live theatre/dance/music performance	40	47	47	42	36	32	31
Social history exhibitions	38	43	43	39	37	35	36
Indigenous and/or Torres Strait Islander exhibitions	37	40	40	37	36	38	38
Exhibitions for children	32	41	42	38	34	28	14
Digital media arts/interactive media	32	36	34	33	32	27	25

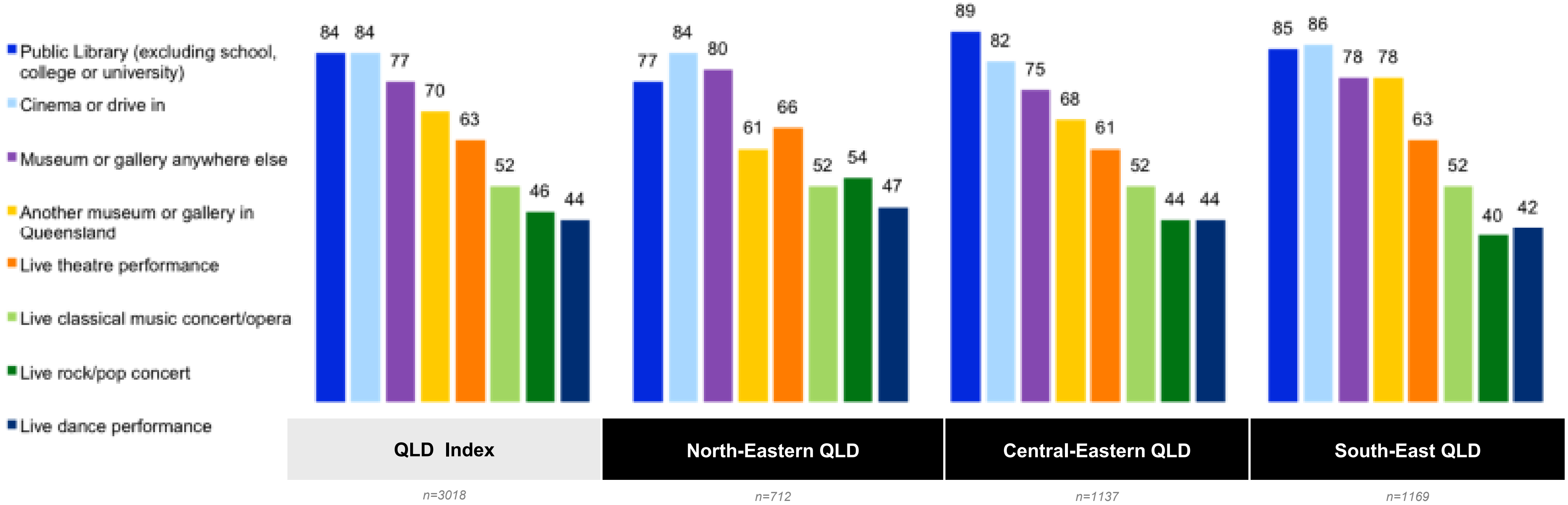
- There is no significant difference in the ranking of preferred exhibition types between tourists and non tourists, with the exception of "Photography" (2nd vs. 5th) and "Exhibitions for Children" (last) for international tourists.
- International tourists show less interest in "Celebrated works of art by well-known international artists" and "Ceramics/glass" than other tourists.

Q21. What types of exhibitions would you most like to see at this gallery? *Base: All visitors, valid responses only*

Other cultural events visited in last 12 months

Breakdown by REGION

All figures are %



- For the average gallery in each region, the cinema and public libraries are the most commonly attended "other" cultural activities undertaken by gallery-goers in the 12 month period prior to their visit.

Q24. Thinking about the last 12 months, how many times have you been to a…?

Base: All visitors, non-responses per item a further exclusion to the base sizes shown above

Other cultural events visited in last 12 months

Breakdown by VISITOR TYPE

All figures are %

Key differences highlighted in yellow	QLD Index	Lives within LGA	Lives within 5km	Non-tourist	QLD tourist	Interstate tourist	Internat'l tourist
	n=3018	*n=1726*	*n=1099*	*n=2246*	*n=624*	*n=293*	*n=170*
Cinema or drive in	84	85	85	86	85	85	77
Public Library	84	84	83	84	87	86	71
Live theatre performance	77	73	73	75	78	88	91
Museum/Gallery within region	70	74	72	76	84	38	33
Museum/Gallery anywhere else	63	62	62	63	66	70	53
Live classic music concert/Opera	52	50	51	51	53	63	46
Live rock/pop concert	46	45	42	44	47	41	53
Live dance performance	44	45	46	45	43	44	39

- Proximity to the gallery and tourist type does not greatly influence the other cultural activities attended in the last 12 months, except attendance at a gallery/museum within the same region (which is more frequented by non-tourists).

Q24. Thinking about the last 12 months, how many times have you been to a…?

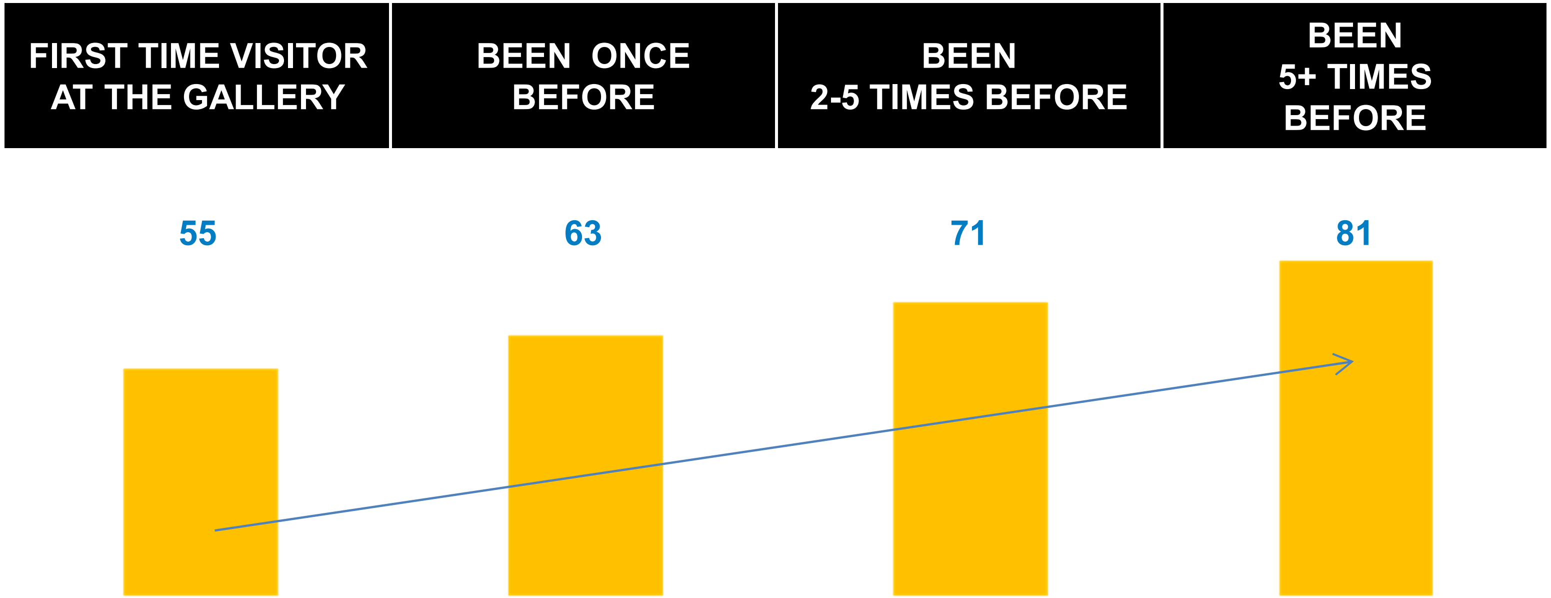
Base: All visitors, valid responses only

Correlation between gallery visits

VISITING A GALLERY IN THE REGION x NUMBER OF TIMES VISITED THE GALLERY OF SURVEY

All figures are %

Have you been to another gallery within the region within the last 12 months?



- There is a distinct correlation between the number of times a visitor has visited their gallery in the past and the proportion who have visited other galleries in the last 12 months within the same region.
- 55% of those who are first-time visitors at time of survey had visited at least one other gallery in the region in the last 12 months. This increases to 81% for those who had visited the gallery at time of survey more than 5 times before.
- This is further support for the hypothesis raised in previous reports, that frequent visitors at a particular gallery are also frequent visitors to galleries elsewhere.

Q24. Thinking about the last 12 months, how many times have you been to a…?

Base: All visitors, valid responses only

Satisfaction & Feedback

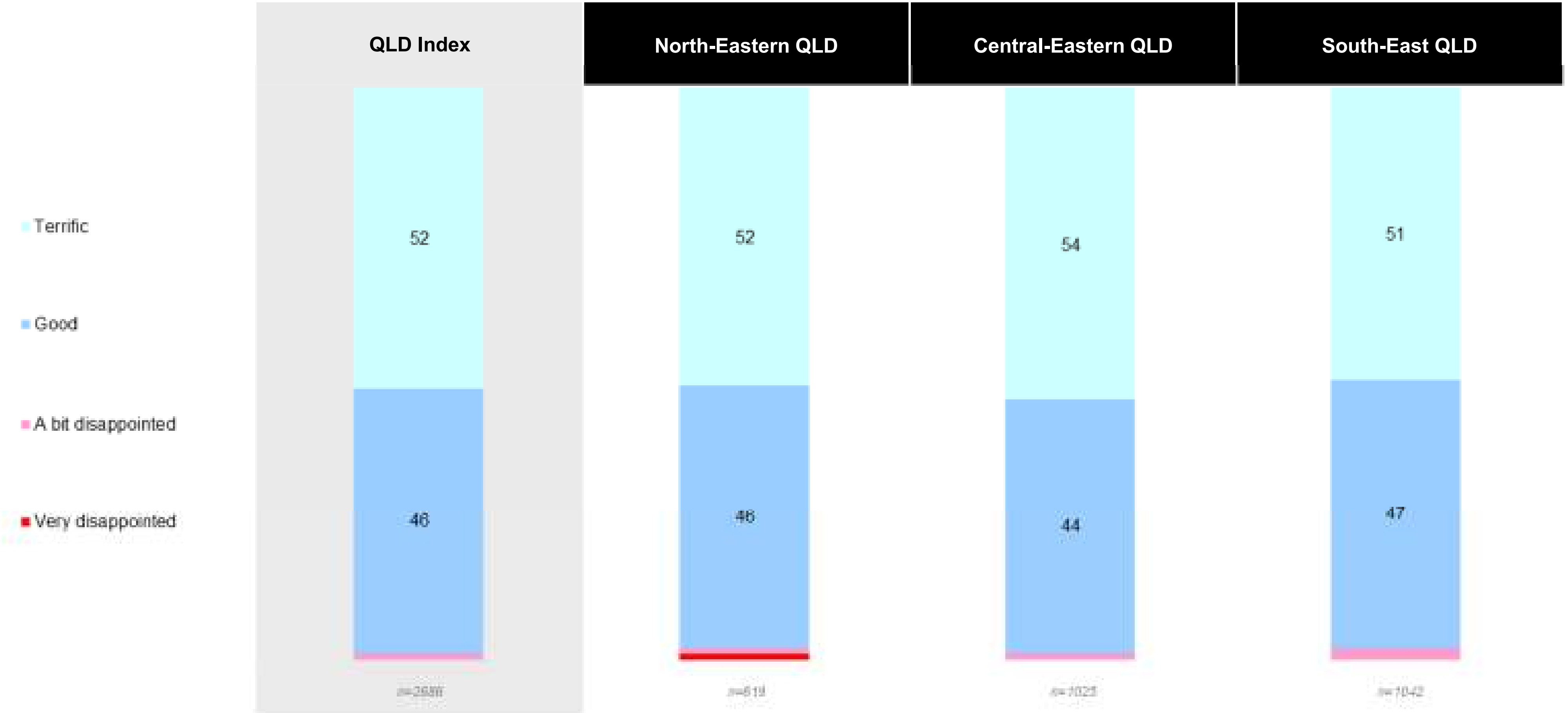
Image courtesy of Gold Coast City Gallery

Overall Satisfaction

museum & gallery SERVICES QUEENSLAND M&G NSW

Breakdown by REGION

All figures are %



- Across regions there is a very high level of satisfaction amongst gallery-goers. Only 1-2% of visitors at the average gallery are “disappointed” with their overall visit.
- Individual galleries were provided with a full list of open-ended feedback about specific highlights and calls for improvement.

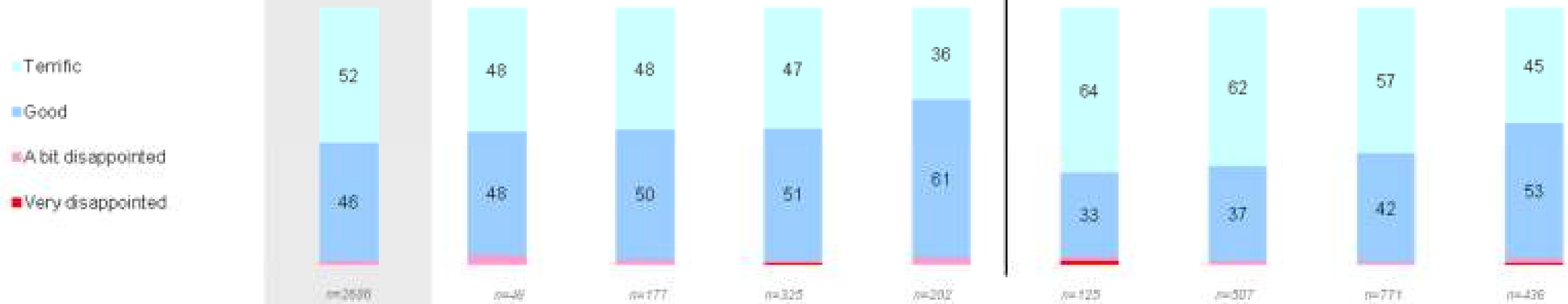
Overall Satisfaction

museum & gallery SERVICES QUEENSLAND · M&G NSW

Breakdown by AGE X GENDER

All figures are %

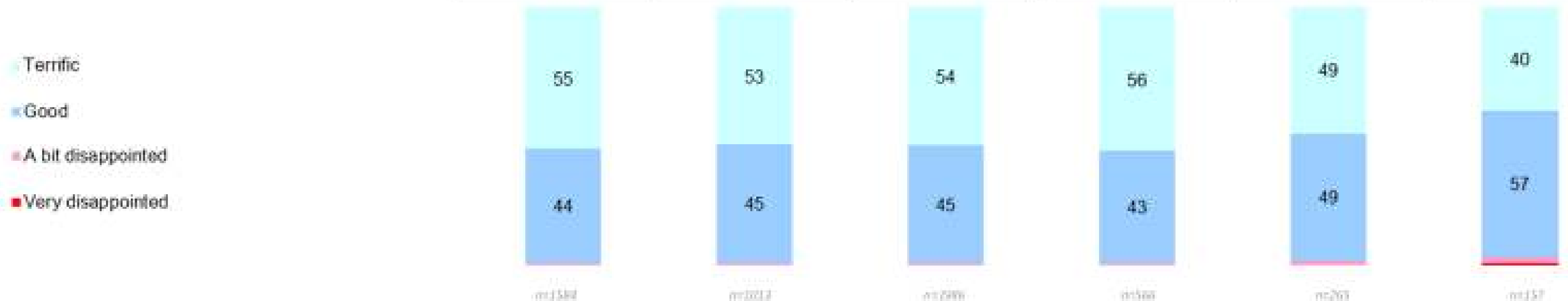
QLD Index | Male <25 | Male 25-44 | Male 45-64 | Male 65+ | Female <25 | Female 25-44 | Female 45-64 | Female 65+



Breakdown by VISITOR TYPE

All figures are %

Lives within LGA | Lives within 5km | Non-tourist | QLD tourist | Interstate tourist | Internat'l tourist



- Generally, female visitors are more likely to rate their visit as "terrific" compared to males. Both genders and all age groups overall are satisfied with their experience at their public gallery.
- International tourists are slightly less likely to rate their experience as "terrific" (40%) and give more "good" responses (57%).

Q10. How would you rate ALL of the following in your visit today? [Overall experience] *Base: All visitors, valid responses only*

Applicability of specific areas

museum & gallery SERVICES QUEENSLAND M&G NSW

All visitors – percentage of visitors who indicated the area is "applicable"

All figures are %

Note: this is a calculation based on 100% minus those who elect the area is "not applicable". It gives an indicator of how frequently visitors are engaging in the following aspect of the gallery.

	QLD Index	North-Eastern QLD	Central-Eastern QLD	South-East QLD
Quality of information at venue	96	94	98	97
Helpfulness of staff/volunteers	96	92	97	97
Children's activities/resources	40	34	41	42
Facilities (bathrooms etc)	68	68	64	73
Gift shop	55	64	58	45
Café	30	43	23	25
Atmosphere/building/space/garden	91	91	92	92
Live performance	18	21	14	20
Lecture/education program, activity, event	35	36	35	35
The quality of today's exhibitions	97	96	97	98
Ease of parking	87	75	90	92
Direction signs to the gallery	94	93	94	93
Being an easy place to get to	99	100	99	99

- Not all respondents rated every element of their visit. For instance, "live performance" represents the smallest subset of visitors, at 18% average whereas 96% rated the "Quality of information at venue".
- Nearly 1 in 3 visitors nominated that they had attended a lecture/education program, activity or event at time of survey.
- *Note: Some respondents skipped the question entirely (i.e.: provided a non-response), and could represent more people who did not participate in the above activities during their visit. If so, the above percentages may be slight over-estimations.*

Q10. How would you rate ALL of the following in your visit today?

Satisfaction with specific areas

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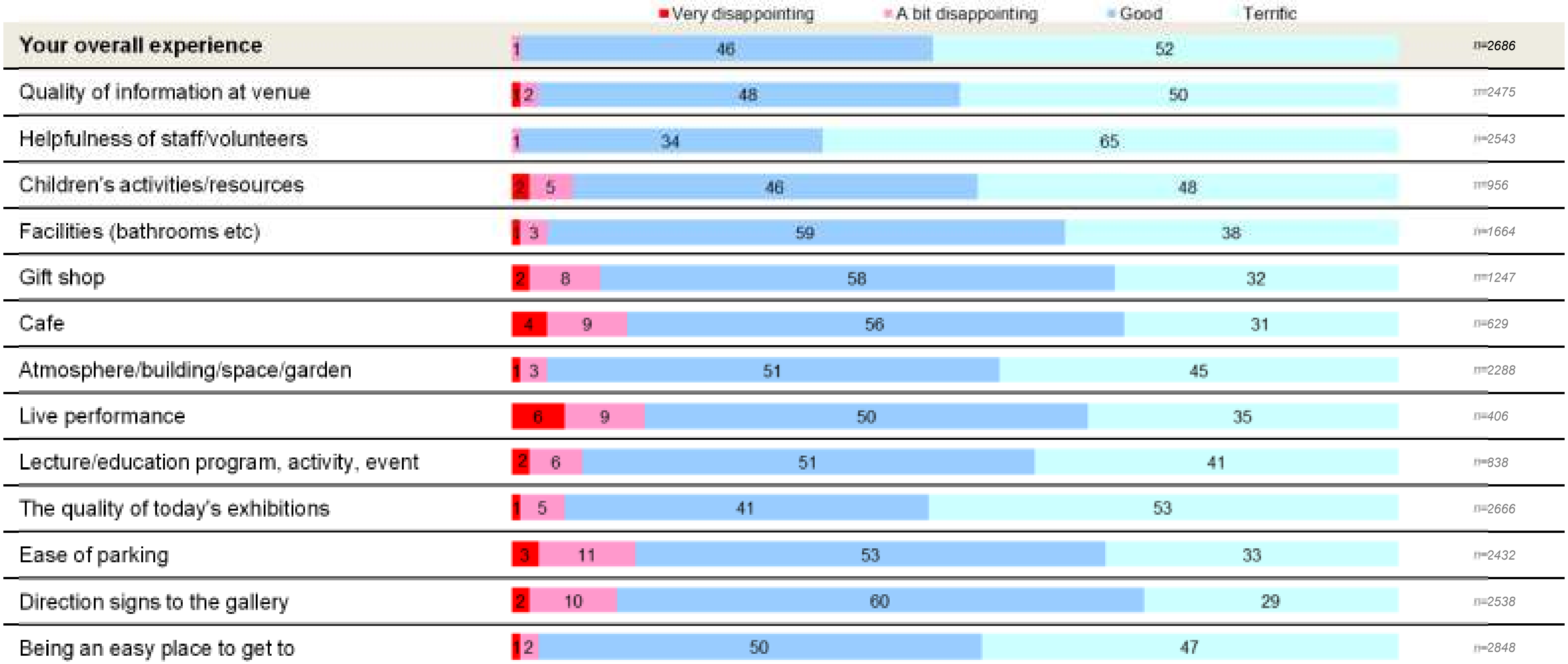
All visitors (excludes those marking "not applicable" in each case)

All figures are %



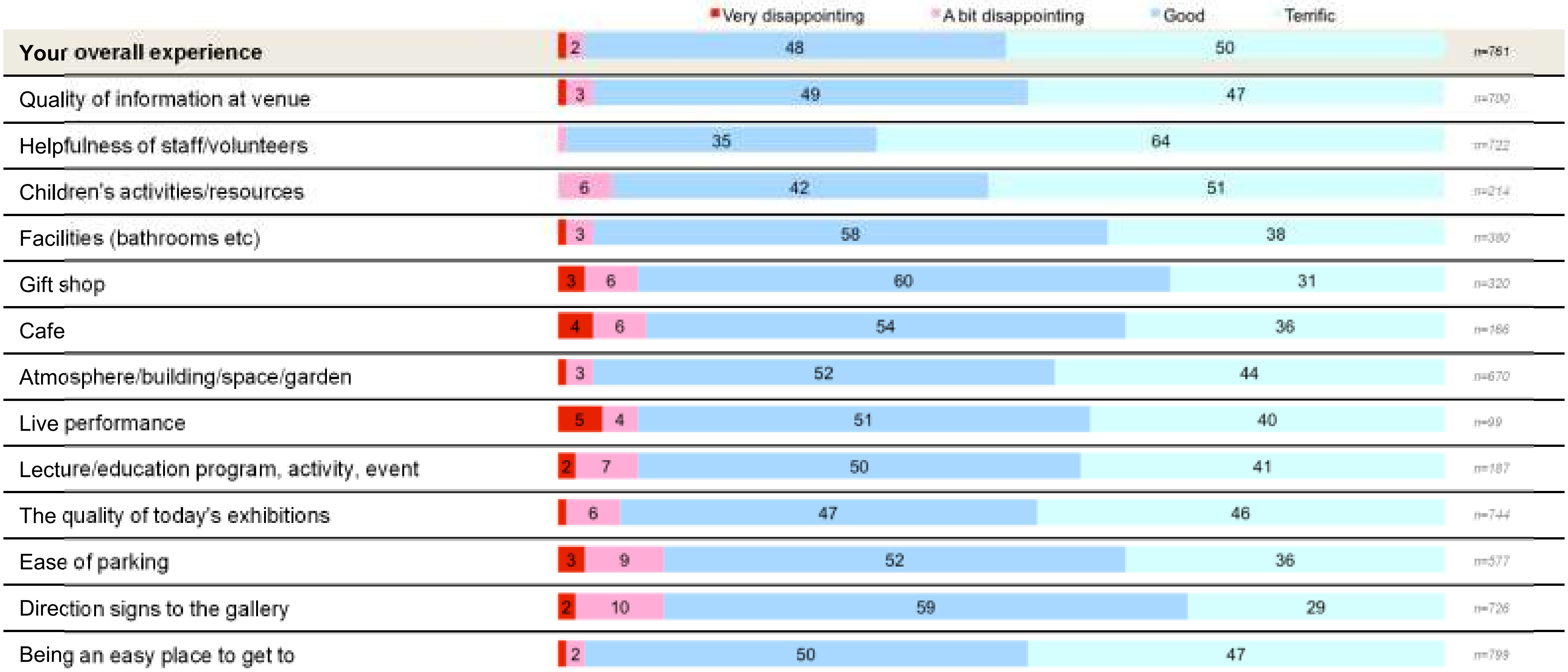
- Most areas of the visit are receiving a high level of "good" or "terrific" ratings.
- In particular, the Café, Gift Shop, Live Performance and Ease of Parking receive at least 1 in 10 "disappointment" ratings at a State average level.
- On the other hand, the Helpfulness of Staff/Volunteers is rated as especially "terrific" (65%) .

Satisfaction with specific areas

museum & gallery SERVICES QUEENSLAND
M&G NSW

First-time visitors

All figures are %



- Satisfaction levels amongst the first-time visitors do not differ markedly from the total visitor pool.

Conclusions & Opportunities

Image courtesy of Noosa Regional Gallery

Conclusions and Opportunities

Overview

- This Study has made several interesting discoveries about public gallery audiences, identified skews in the audience profile, as well as provided evidence to dispel certain myths about visitors.
- Of most interest is the lack of any wholesale differences between Queensland average gallery audiences and those of NSW. As a result, a number of these conclusions and recommendations are similar to those of the NSW State Report released in 2011. A comparison between the NSW and Queensland data can be found in the appendix.
- Interesting discoveries about gallery audiences include:
  - The visitation of multiple galleries by gallery enthusiasts (i.e.: more visitation can lead to more visitation elsewhere).
  - The effect of proximity (local communities vs. visitors travelling further vs. "tourists").
  - The different ways in which galleries "reach" visitors of varying demographics (particularly in relation to age).
  - The dominance of "word of mouth" as an information source about galleries.
  - That public galleries are not just for the wealthy, but represent an accessible activity for people of all socio-economic levels.
  - Public galleries connect with their vibrant local communities.

Conclusions and Opportunities

Overview *(continued)*

▪Consistent skews have been shown across regions:

- A consistently more female audience, though this lessens for interstate and international tourists.
- An older audience, particularly the over 55's.
- A more educated audience (with higher proportions of undergraduate and post-graduate degrees compared to national averages).

▪40% of Queensland gallery audiences are tourists. Interstate and international tourists are likely to be staying more than the recently reported average of 2.5 nights (ABS) in the region. Queensland tourists are more likely to be staying up to three nights and in non-paid accommodation compared to other tourists.

▪These findings identify opportunities for public galleries to grow, diversify and sustain their audience base. It is interesting to note that all galleries have a reasonable balance between new (30%) and returning audiences.

▪All the individual galleries have received bespoke reports containing feedback and suggestions for audience development arising from the data. The conclusions and recommendations in this report outline only over-arching themes and contexts that Queensland public galleries should take into consideration.

Conclusions and Opportunities

Identifying the key, most meaningful differences in the data

- Looking at the regional averages, there are not marked differences between the audience profile in the different regions with the exception that the North-Eastern galleries have a higher presence of visitors aged under 35.
- The more meaningful insights have been uncovered by looking at the different visitor segments by demographics (namely age), place of usual residence (namely tourism) and behavioural (namely first-timers).
- The effect of localism and tourism has been explored and shown through the analysis of this report.
  - Local visitors (indexed by those living within 5km or within the LGA) are the most likely to be engaged with their respective gallery's workshops, talks and group activities, as well as visiting the gallery more frequently and repeatedly.
  - Growing the local audience and retaining the existing local loyalists should be part of any public gallery audience development strategy.
- Differences by age bracket represent the most insightful demographic segmentation, and has implications for marketing and programming.
- First-time visitors, particularly the "non-tourists", represent an important opportunity for audience growth.
  - Public galleries should be mindful of retaining first-time visitors without alienating their existing visitor base.
  - Retaining first-time visitors who are non-tourists is one of the most efficient strategies available to public galleries to strengthen their audiences.

Conclusions and Opportunities

Engaging audiences through new and existing channels of communication

- There is an opportunity to grow the 15-34's audience. This is consistent across all Queensland galleries who participated in this Study.
- Although brochures, fliers and the community newspapers have been important sources of information in the past, the results of the Study show these information types/strategies are most likely to be connecting with an older audience.
- On the other hand, younger audiences are more likely to use the Internet as a source of information, and may present the most cost-effective and efficient means of connecting with a younger audience base.
- Though Internet use is higher amongst males and younger people, 95% of gallery audiences are online, with 73% using it to find things to do. Recent ABS statistics (81460 *Household Use of Information Technology Australia 2010-2011*) reports 79% of households have access to the Internet.
- When considering that "word of mouth" is the key source of information cited, galleries have an opportunity to leverage social media platforms and assist their audiences to provide peer recommendation. Recent figures from Roy Morgan (*The Digital Universe* August 2012) show that 12.5 million Australians use Facebook, and 2.9 million Australians use Google+. 11% of Australians were using Twitter. Furthermore, in 2012 there were over 8.6 million smart phones in Australia, with 25% of Australian smartphone owners using their mobile for social networking.

Conclusions and Opportunities

Engaging audiences through existing channels of communication *(continued)*

- A website is important in providing information and it is becoming an expectation amongst gallery audiences. Galleries have an opportunity to move from "talking to" audiences to "talking with" by truly engaging audiences seeking a closer relationship.
- Recent consumer behaviour trends show that brands and organisations are engaging with their consumers in a bi-directional manner (i.e.: moving on from "passive" or one-directional communication to engaging in an active conversation). Social media is a key facilitator allowing consumers to "talk back" to the gallery and to share and debate their ideas with their peers.
- Recent Australia Council Research (*Connecting:// arts audiences online*), identified six key points of online contact. They are: Awareness, Research, Booking, Preparation, At the event and After the event. The provision of material to share, information about exhibitions, rich media such as curator talks, virtual tours all will help engage not only a younger audience but will also engage an online audience more deeply.
- "Analogue" channels such as clear signage and tourist information also should not be ignored. These and "passing by" were cited by 10% or more of gallery audiences as a way they found out about the gallery.

Conclusions and Opportunities

Loyal advocates and shared communication initiatives

- In the data we see correlations of behaviour that point to the existence of groups who are regular gallery-goers, who visit the gallery of survey frequently, but who also visit other galleries.
- Those who have visited the gallery more than 5 times in the past are more likely to be returning to that gallery more frequently.
- Furthermore, looking at the patterns of visitation, the data has shown consistently that greater visitation to a particular gallery correlates with increased visitation to other galleries in the last 12 months.
- In other words, the more you go to galleries, the more you go to galleries. The notion that one gallery “steals” another’s audience may indeed be a false assumption.
- This represents an interesting opportunity for public galleries across Queensland to work collaboratively to engage the gallery enthusiasts.
- M&GSQ is eager to work with groups of galleries in developing cross-promotional activities to strengthen the wider audience base across Queensland and Australia.

Conclusions and Opportunities

Incremental gains in audience satisfaction lead to greater engagement and advocacy

- Overall, public gallery audiences appear to be fairly satisfied by their visit to the gallery (i.e.: mostly “good” and “terrific” ratings).
- However, incremental gains in satisfaction (i.e.: shifting “good” ratings to “terrific”) offers the greatest opportunity to deepen the loyalty of the audience base.
- A “terrific” experience links to more visits to the gallery. Data from previous studies, including the NSW State Report, supports that “terrific” experiences also link to greater levels of advocacy.
- Consistently, “advocacy” (i.e.: “word of mouth”) has shown to be a critical source of information about public galleries, and any strategy to grow advocacy by lifting the satisfaction level higher should be pursued.
- The key strategic question is how to increase the ratings from “good” to “terrific” for most galleries. The answer will be specific to each gallery but some key opportunities were identified at an aggregated level (either in the data or in the open-ended feedback), offering a good starting point for consideration:
  - Offering excellent social/communal space (i.e.: in gardens, café or similar).
  - Engagement through a workshop, talk or group activity.
  - Programming that excites and stimulates an audience (including ongoing support for local artists).
  - Exploring the accessibility of the gallery both physically and virtually.
  - Use of the gallery spaces in a non traditional way, for example art/craft fairs, music performances.
  - Alternative opening hours.

Final Words

- The main aim of the Strategic Audience Evaluation and Development Study was to provide a research benchmark for public galleries in Queensland, offering a consistent, structured approach for evaluating gallery audiences.
- M&GSQ encourages galleries to review their individual data in light of this Report and previous aggregated reports (such as the NSW State Report) to understand how their gallery fits with the profile of galleries across Queensland and NSW.
- From here, galleries are encouraged to track their audience base, and are encouraged to select questions from this survey's questionnaire in order to compare data across time.
- Along with this, galleries are encouraged to adapt the questionnaire with additional questions that measure audience dynamics specific to their gallery. The questionnaire used in this survey was designed to be a "generalist" questionnaire in order to aggregate data and be useable in all Queensland and NSW public galleries.
- As mentioned in previous reports, galleries should also consider conducting more in-depth qualitative work with selected audience representatives to better understand the reasons for audience profiles, how to best execute audience development opportunities, and other specific issues pertinent to their gallery and locality.
- M&GSQ looks forward to working with any public gallery in developing their research program in the future.

Appendix I

Comparisons to NSW State Data

Image courtesy of Gladstone Regional Art Gallery and Museum

Comparison to NSW State Report

- Published in 2011, The NSW State Report was a collation of over 8000 responses collected in public galleries across NSW over a three-year period (2007-2010).
- It is a comprehensive benchmark of gallery audiences. Included in the report are three key indices: the NSW State Report, the Sydney Metro Index and the Regional Index. The Regional Index excludes the galleries from the Sydney metropolitan area.
- Appendix 1 shows comparison of key demographics between the Queensland Index and the NSW State Index. The areas compared are: location, gender, age, income, work status, education, language other than English, frequency of visitation, who they come with, length of visit, attendance at public programs and source of information.
- Also included is data on motivations for attendance, Internet use and attendance at other cultural events as well as level of satisfaction.
- Where it is of interest, the NSW Regional Index is also included.

Comparison to NSW State Report

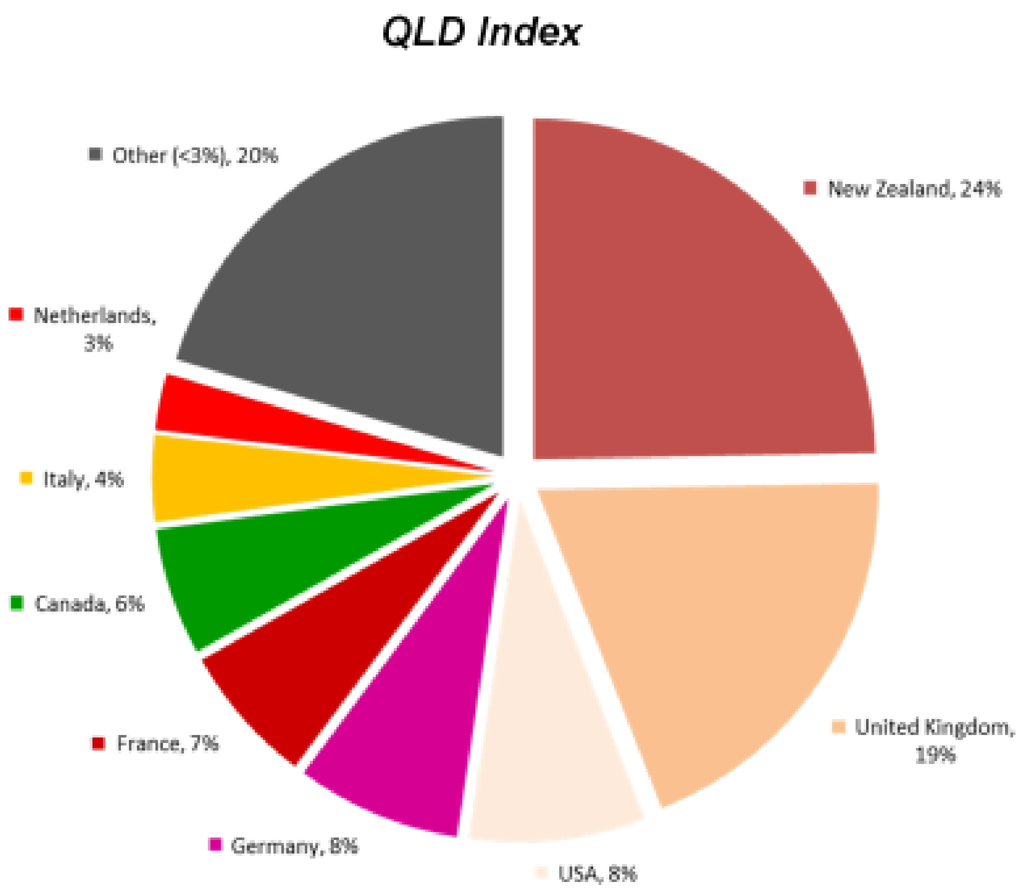
- Across most areas there is no major difference between Queensland and NSW audiences with the following exceptions:
  - There is a higher proportion of tourists overall in Queensland.
  - Queensland visitors are more likely to come from the LGA. This however is understandable given the much larger size of the Queensland LGA.
  - NSW has a higher representation of 15-34's.
  - NSW visitors are slightly more likely to hold a post-graduate degree.
  - Queensland audiences are more likely to be visiting with children.
  - Queensland tourists are more likely to stay in paid accommodation and are staying longer.
  - Though "word of mouth" is the highest cited source of information, it is more frequently cited in NSW whereas in Queensland, "passing by" and external signage is more frequently cited.
  - NSW audiences are more likely to be motivated to see a special exhibition whereas Queensland audiences are more likely to want to see the general collection. Interestingly they are ranked the same by both State audiences (Special exhibitions: 1st, General collections: 2nd).
  - Family and friends is a stronger motivation for attending for Queensland audiences, as is "to share art with other people".
  - Queensland audiences are more likely to attend another gallery anywhere.

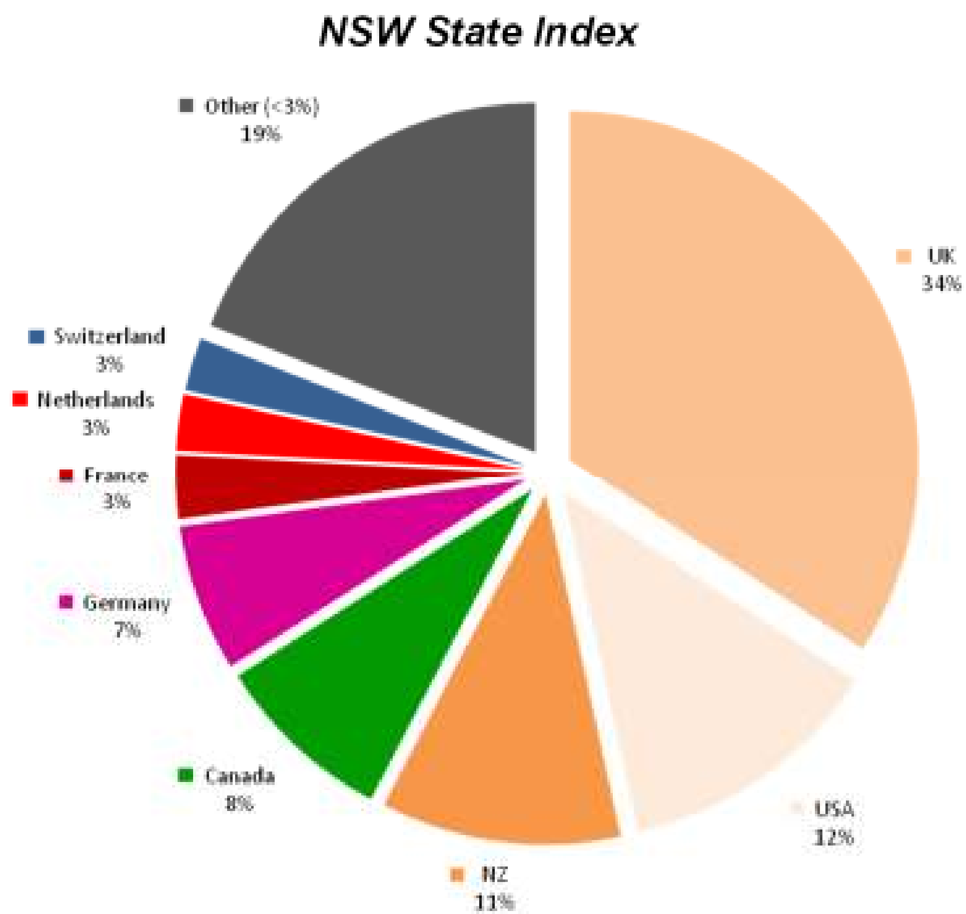
Locations/Origins

All figures are %

- Queensland visitors show a much higher proportion of intrastate visitors who live beyond 50km of the gallery.
- Queensland also has a higher proportion of interstate tourists.
- Interestingly, the proportion of international tourists is the same for both State indices.

International Tourist Origins

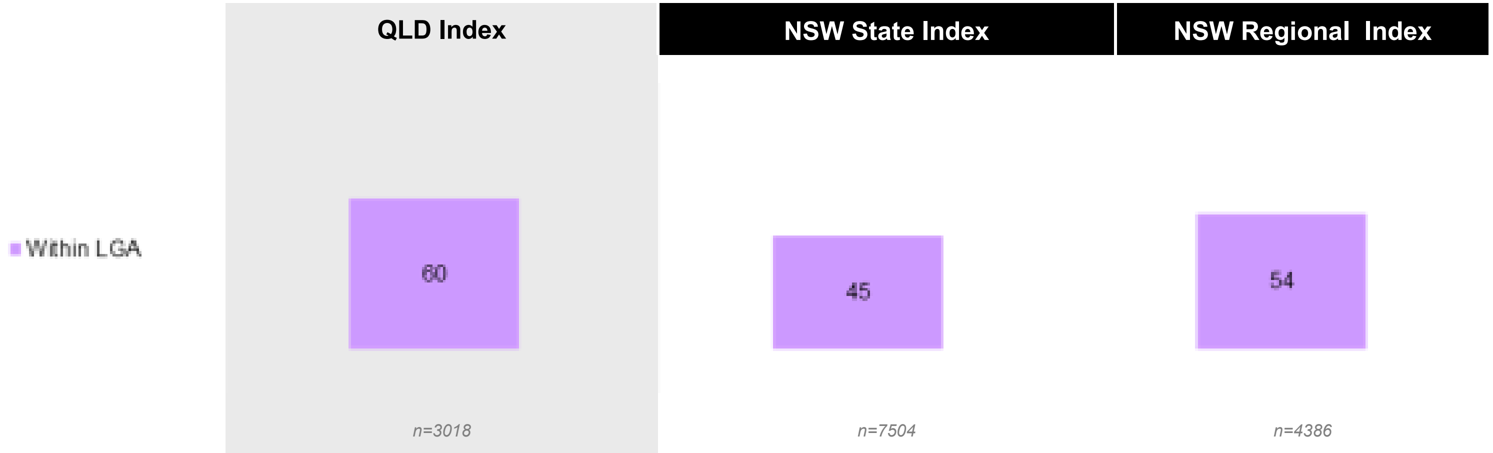




- Queensland and NSW international tourist profiles are similar with respect to the 3-4 major English-speaking countries (UK, USA, NZ and Canada), but the relative mix is slightly different, with Queensland showing a much higher proportion of New Zealanders.

LGA status

All figures are %



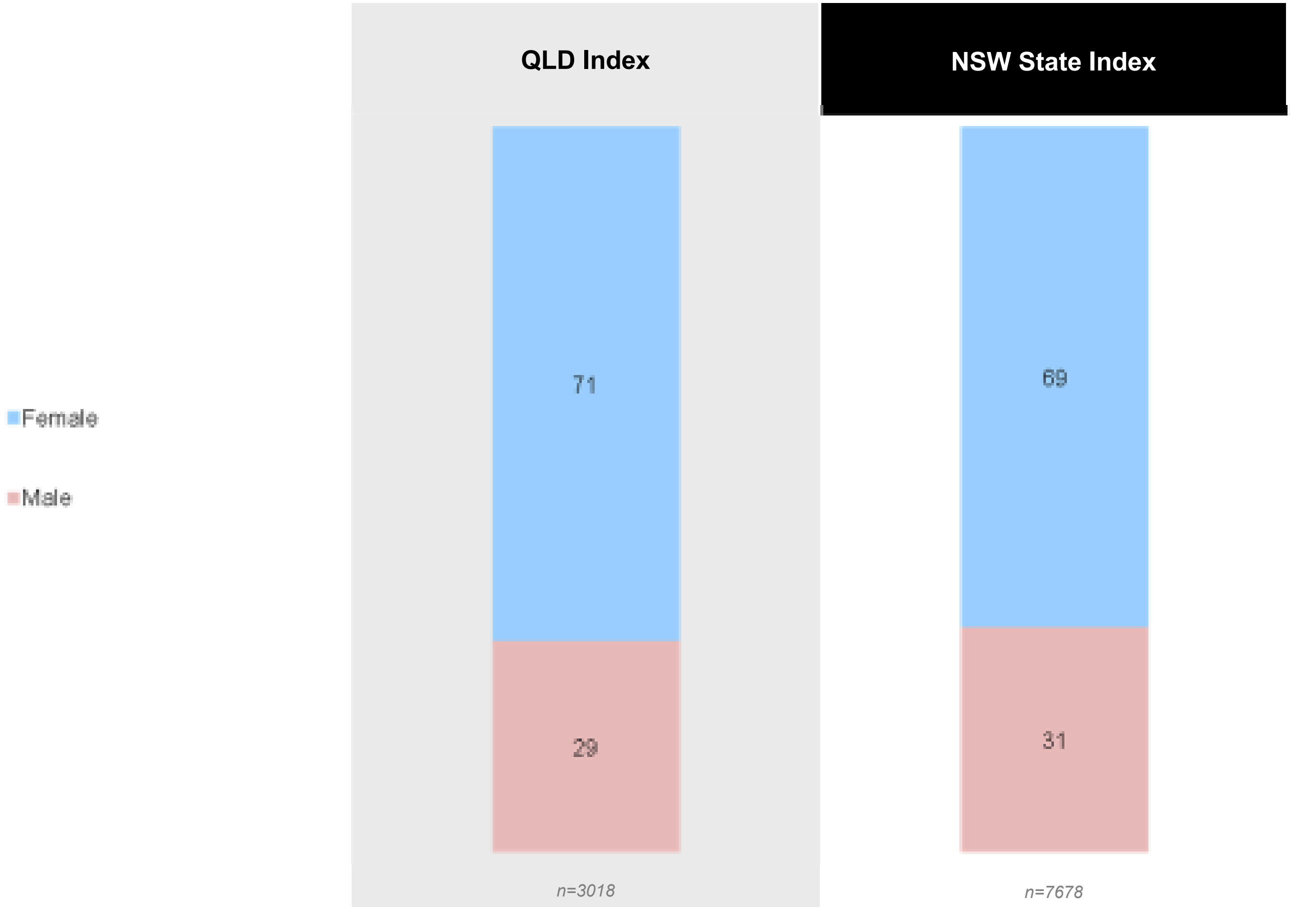
- Queensland visitors have a higher likelihood of living within the LGA of the gallery. This is understandable given the larger LGA areas in Queensland.
- This also is true of both the NSW State Index which included Sydney Metro audiences and the NSW Regional Index.

(Location based on postcodes)

Base: All visitors, all valid responses

Gender

All figures are %



- Queensland and NSW visitors both show a skew to female visitors, around 70%.

Q13. Are you Male or Female?

Base: All visitors, all valid responses

Age

All figures are %

- Queensland and NSW visitors are similar with respect to age profiles.
- Of interest the NSW Regional Index shows a higher portion of 55+ to both the QLD Index and the NSW State Index. It should be noted that in NSW the regional population is older than the Metro population (ABS).

Income

All figures are %

- Queensland and NSW visitors are similar with respect to gross annual household income levels.

Occupation

All figures are %

- Queensland and NSW visitors are similar with respect to "main occupation", although Queensland visitors are more likely to be retired.

Q25. What is your main occupation?

Base: All visitors, valid responses only

Education

All figures are %

- Queensland and NSW visitors are similar with respect to highest level of education, although NSW visitors are slightly more likely to hold post-graduate degrees.
- When the QLD Index is compared to the NSW Regional Index, the proportions of education level are very similar.

Diversity

All figures are %

	QLD Index	NSW State Index
Language other than English at home*	14%	15%
Indigenous	3%	2%
Disability that "impacts on their visit"**	3%	4%

- Queensland and NSW visitors are similar with respect to the levels of diversity, particularly with LOTE visitors.

- **Note: The questionnaire for this survey was only available in English, which may have biased against LOTE visitors.*
- ***Note: No ABS data available for direct comparison to the disability question.*

Q14. Aboriginal or Torres Strait Islander descent?
Q15. Language other than English…?
Q26. Disability or other condition?

Base: Either ALL visitors or WITHIN NSW (as shown), valid responses only

Number of times visited

All figures are %

- Queensland and NSW visitors are similar with respect to the history of visits and familiarity with the gallery.

When last visited

All figures are %

- Queensland and NSW visitors are similar with respect to the frequency of past visits.

Who visiting with

All figures are %

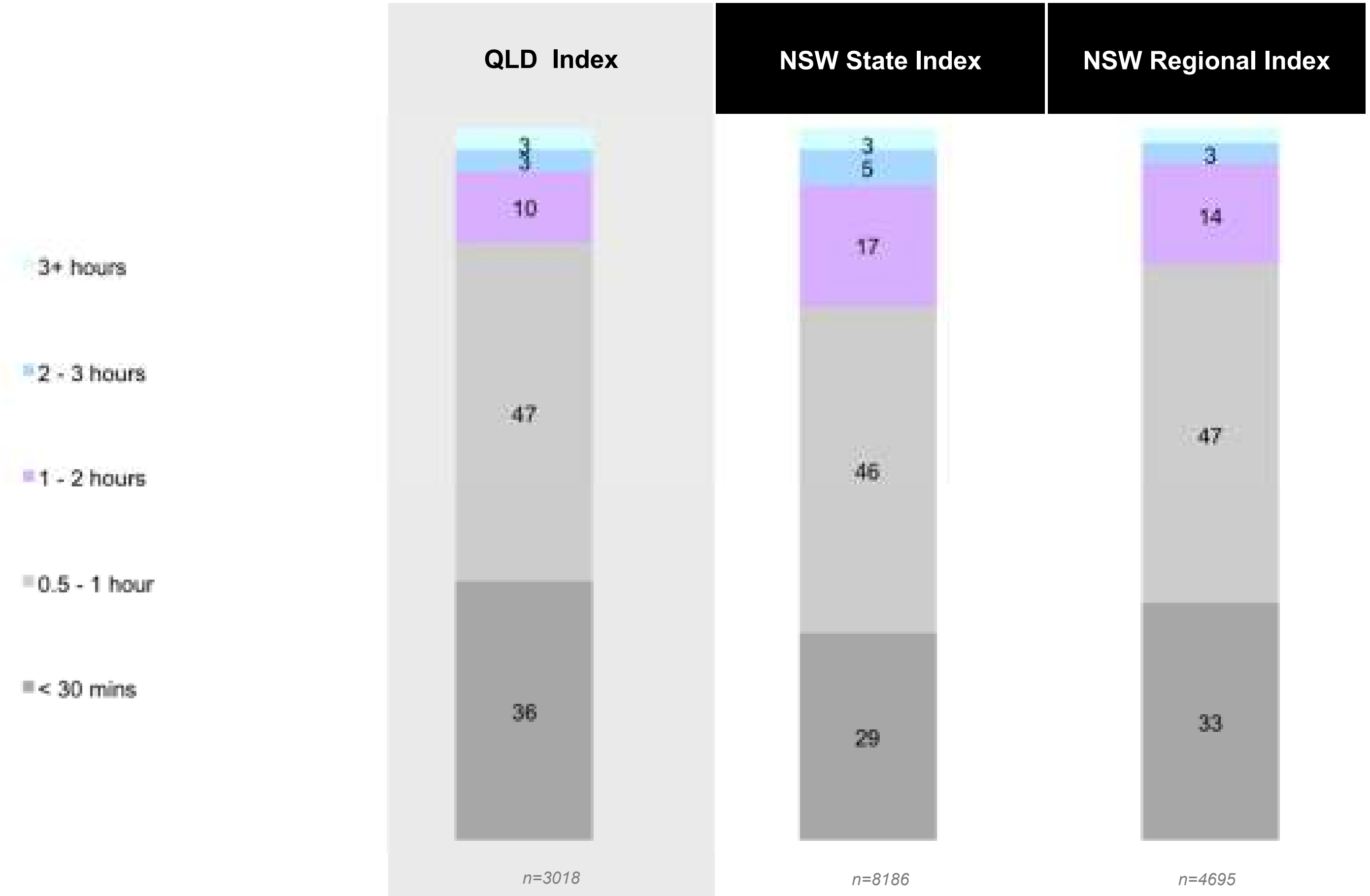
- Queensland and NSW visitors are similar with respect to who they visit with.
- Queensland audiences show a higher proportion of visitors attending with children.

Q3. Who are you visiting with today?

Base: All visitors, valid responses only

Length of visit

All figures are %



- Queensland visitors are slightly more likely to make a shorter visit than NSW visitors, particularly in the less than 30-minute domain.
- NSW visitors are more likely to be in the 1-2 hour bracket.
- It should be noted that a number of Queensland regional galleries have a smaller exhibition space, similar to a number of NSW regional galleries, when compared to the Sydney Metro galleries.

Attendance at public program

All figures are %

- Queensland and NSW visitors are similar with respect to attendance at public programs.

Q5. Have you or any member of your family ever been to a workshop, talk or group activity at this gallery before today? *Base: All visitors, valid responses only*

Tourist – length of stay in region

All figures are %

Who staying with?

	QLD Index	NSW State Index
Home of friend or relative	**39%**	**47%**
Paid accommodation	**61%**	**53%**

- Queensland tourists are staying longer than NSW tourists on average.
- Queensland tourists are more likely to be in paid accommodation than NSW tourists.
- Recent ABS data (8035.04 *Tourist Accommodation*) identifies the average length of stay in Queensland establishments with more than 15 rooms as 2.5 nights. The NSW average length of stay was 2.2 nights.

Q22. If you are a visitor to the region – how long are you staying in the area? &
Q23. Are you staying in paid accommodation?

Base: All visitors, valid responses only

Source of information

Top 5 *(overall) sources of information*

All figures are %

- "Word of mouth" is the most prevalent source of information in both States.
- Local knowledge and proximity is a stronger (more common) driver in Queensland than in NSW.

Source of information

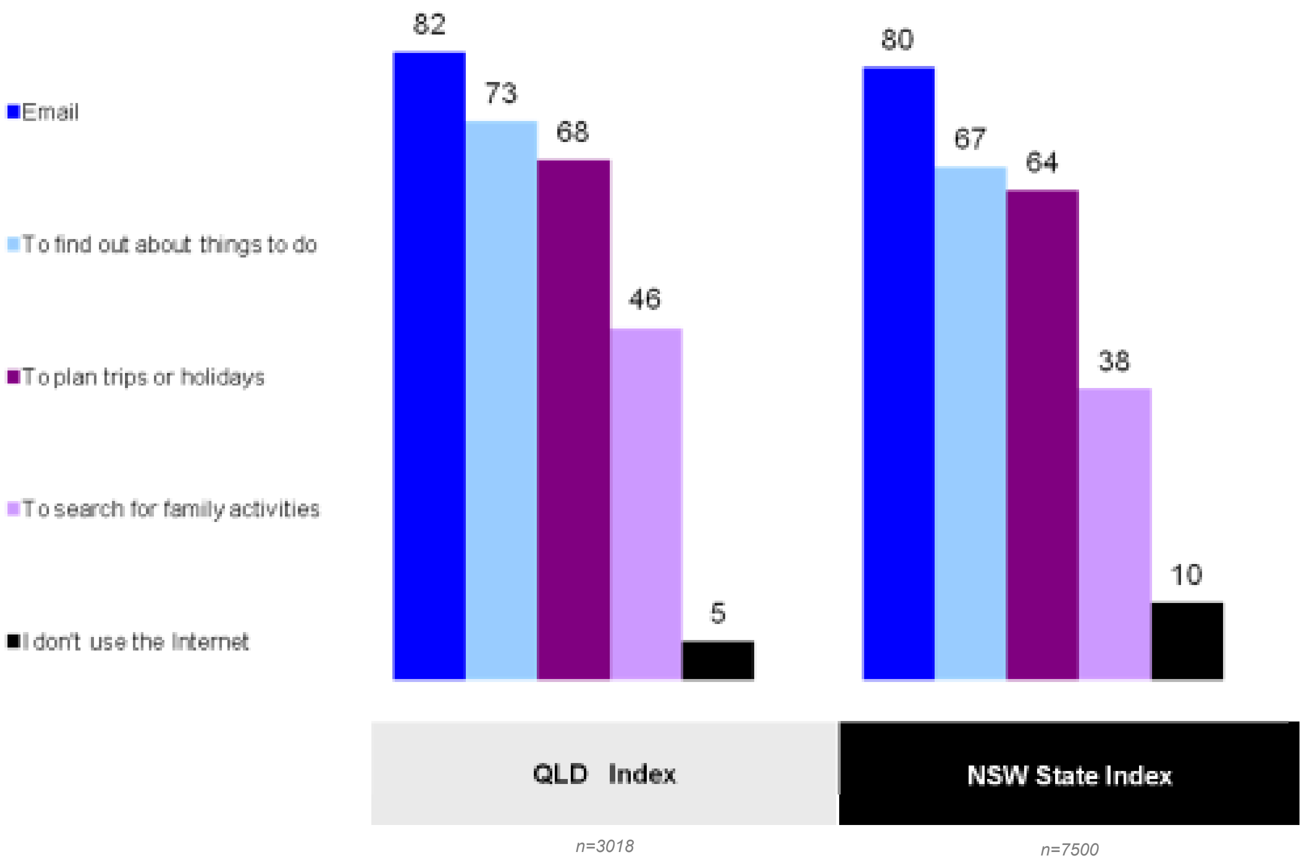
All figures are %

Key differences highlighted in yellow	QLD Index	NSW State Index
	n=3018	*n=8030*
Word of mouth	28	34
Brochure or flier	16	16
Newspaper (local/community)	15	16
Sign/billboard/banner	11	9
I was passing by	10	5
Tourist information/publication	10	10
Information on Internet	8	6
By invitation or free ticket	7	8
Poster	4	4
Newspaper (major metropolitan)	4	7
I Live Locally	3	3
Radio	2	4
I'm a regular visitor (I visit often, regularly visit exhibits)	2	3

- "Word of mouth" is the most prevalent source of information in both States. It is more highly cited in NSW than Queensland.
- "I was passing by" is a stronger (more common) driver in Queensland than in NSW.

Internet use

All figures are %



- Both States are highly connected online and using the Internet to plan activities and trips.

Motivations for coming

All figures are %

Key differences highlighted in yellow	QLD Index	NSW State Index
	n=3018	*n=8184*
To see a special exhibition	42	51
To see the general gallery collection	35	30
Family/friends	34	29
I like coming to this gallery	28	23
Holidaying/touring in the area	15	10
To have a good time out	14	14
I have heard good things about it	13	14
To fill in time	10	7
To try something new	10	9
For study purposes/self-education	8	9
Attend an event/activity/performance	7	6
The reputation of the artist/s and/or exhibition	7	12
To visit the gallery shop	7	5
To visit the café	4	9
As part of an organised group excursion/tour	3	3

Only values over 1% shown.

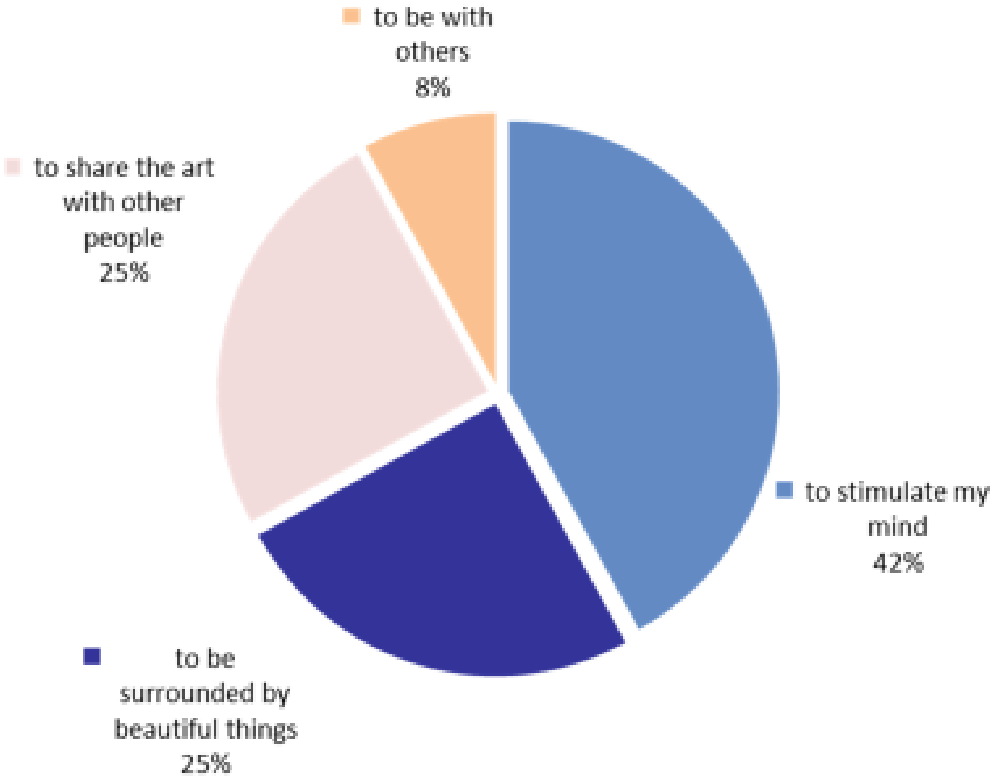
- NSW visitors are more likely to be driven by special exhibitions.
- Queensland visitors cite the general collection and "family and friends" more frequently than NSW visitors.

Q9. What were the three main reasons you came to the gallery or exhibition today?

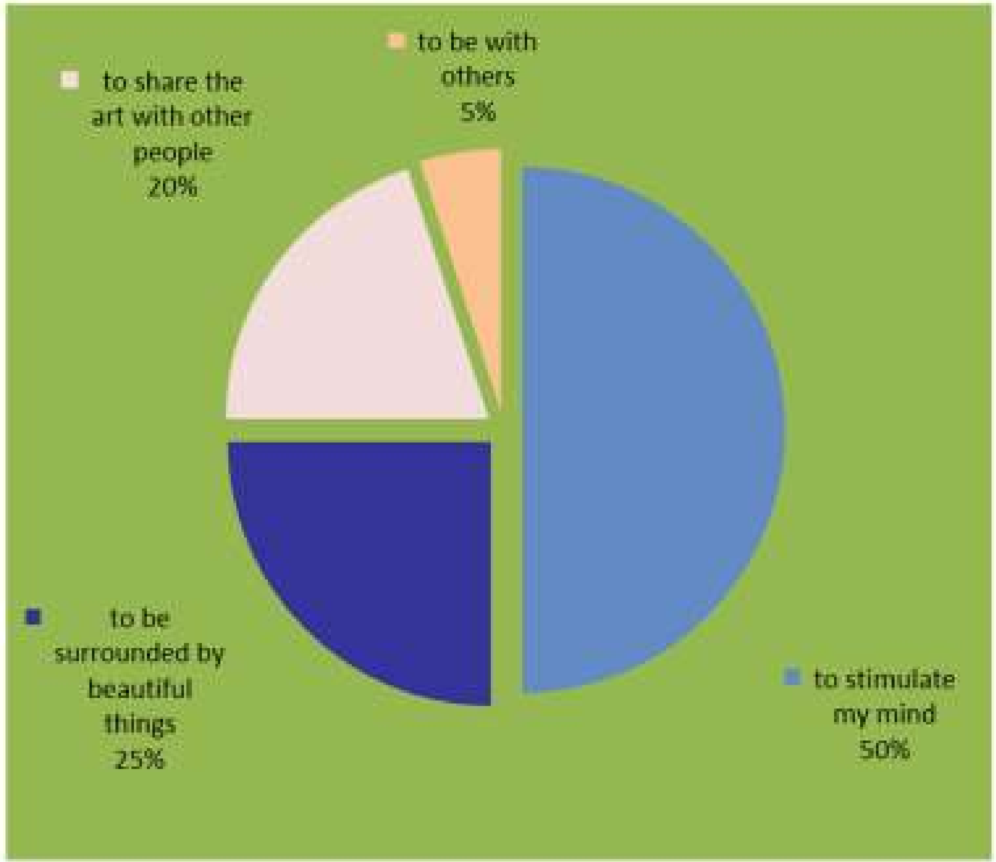
Base: All visitors, valid responses only

Personal Reason for Visiting Gallery

QLD Index



NSW State Index



- Whereas the overall size of segments is relatively similar between States, Queensland visitors are more likely to be primarily driven by wanting to "share art with other people", whereas NSW visitors are more likely to be driven by wanting to "stimulate my mind".

Q8. Which of the following best describes you..?

Base: All respondents (NOTE: NSW is regional data only)

Interest in exhibition type

All figures are %

Key differences highlighted in yellow	QLD Index	NSW State Index
	n=3018	n=7460
Painting	79	81
Exhibitions of work by local artists	64	64
Sculpture	63	63
Celebrated works of art by well-known Australian artists	63	64
Photography	63	67
Drawing	61	62
Celebrated works of art by well-known international artists	53	54
Ceramics/glass	51	51
Textiles	43	44
Printmaking	40	41
Live theatre/dance/music performance	40	40
Social history exhibitions	38	39
Indigenous and/or Torres Strait Islander exhibitions	37	40
Exhibitions for children	33	(not in questionnaire)
Digital media arts/interactive media	32	32

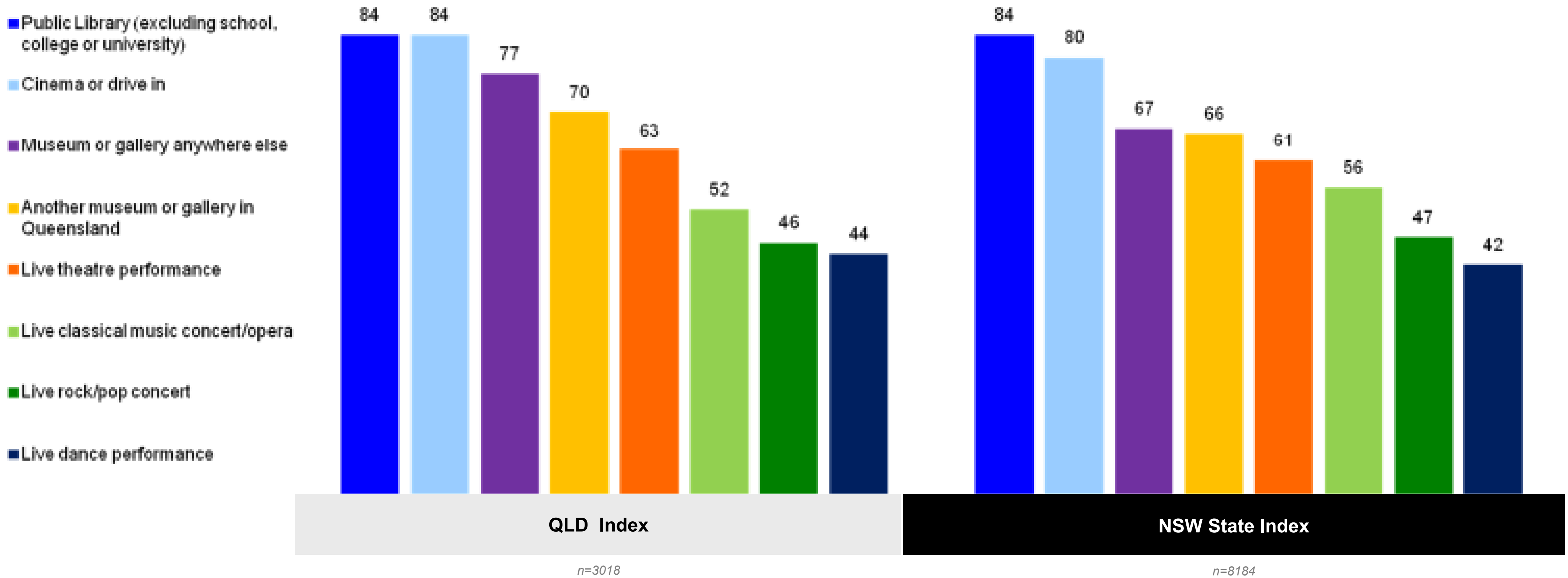
- NSW and Queensland visitors express similar preferences in exhibition types, with painting being the most preferred in both States.
- Photography is cited slightly more frequently in NSW.

Q21. What types of exhibitions would you most like to see at this gallery?

Base: All visitors, valid responses only

Other cultural events visited in last 12 months

All figures are %



- The rate of visitation of other cultural activities is similar in both States, with public libraries and cinema being the top other activities.

Overall Satisfaction

All figures are %

- NSW and Queensland visitors are very satisfied with their visits.

Satisfaction with specific areas

All visitors (excludes those marking "not applicable" in each case)

All figures are %

QLD Index | **NSW State Index**

- Although in the minority, accessibility (ease of parking and direction signs) are sources of disappointment for both States (at over 10% disappointment levels), as are live performances and the café (where applicable).

Appendix II
The Survey Instrument

Image courtesy of Redland Art Gallery

NOTE: The following pages contain the questions asked in the standardised self complete paper survey used for the Queensland Study.

The layout has been adjusted to accommodate a landscape format and all coding references have been removed.

1. How many times have you visited this gallery *before today*? (Tick ONE)
Never ❒
Once ❒
2-3 times ❒
4-5 times ❒
More than 5 times ❒

2. When was your last visit? (Tick ONE)
Never visited before ❒
Within the last month ❒
Within the last 2-6 months ❒
About 6-12 months ago ❒
More than a year ago ❒
More than 2 years ago ❒

3. Who are you visiting with today? (Tick ONE)
On my own ❒
With spouse or partner ❒
With family/friends including children ❒
With family/friends NOT including children ❒
With an organised group or tour ❒

4. How long was your visit today? (Tick ONE)
Less than 30 minutes ❒
30 minutes – 1 hour ❒
1-2 hours ❒
2-3 hours ❒
3+ hours ❒

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

Yes ❒ No ❒ Don't know ❒

6. How did you hear about this gallery or this exhibition? (Tick ALL boxes that apply)

Brochure or flier ❒
Poster ❒
Recommended by someone I know ❒
By invitation or free ticket ❒
Tourist information/publication ❒
Newspaper (major metropolitan) ❒
Newspaper (local/community) ❒
Radio ❒
Information on Internet ❒
Sign/billboard/banner ❒
Other (please specify) ❒______________

7. What programs and workshops would you or your family like to attend here? (Tick ALL boxes that apply)

Artist talks ❒
Workshops/courses ❒
Kids programs ❒
Tours ❒
Live music ❒
Performances/theatre ❒
Poetry/writing ❒
Art/craft or music fairs ❒
Other (please specify) ❒______________

8. Which of the following best describes you today? (Tick ONE box only)

- I come to the gallery to be with others ❒
- I come to the gallery to stimulate my mind ❒
- I come to the gallery to be surrounded by beautiful things ❒
- I come to the gallery to share the art with other people ❒

9. What were the THREE MAIN reasons you came to the gallery or exhibition today? (Tick up to THREE boxes only)

- To see a special exhibition ❒
- To see the general gallery collection ❒
- I have heard good things about it ❒
- I came with family members and/or friends, ❒
- OR I brought family members and/or friends ❒
- The reputation of the artist/s and/or exhibition ❒
- As part of an organised group excursion/tour ❒
- For a workshop, launch, talk, concert or event ❒
- To try something new ❒
- To have a good time out ❒
- To visit the gallery shop ❒
- To visit the café ❒
- To visit the gardens ❒
- For study purposes/self-education ❒
- I like coming to this gallery ❒
- Holidaying/touring in the area ❒
- To attend a live performance ❒
- To fill in time ❒
- Other (please specify) ❒___________________________

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

	Very Disappointing	A Bit Disappointing	Good	Terrific	Not Applicable
Being an easy place to get to					
Direction signs to the gallery/museum					
Ease of parking					
The quality of today's exhibitions					
Lecture/education program, activity, event					
Live performance					
Atmosphere/building/space/garden					
Café					
Gift shop					
Facilities (bathrooms etc)					
Children's activities/resources					
Helpfulness of staff/volunteers					
Quality of information at venue					
Your overall experience					

11. Is there anything you particularly liked about your visit today?________________________

12. Is there anything that would have made your visit more enjoyable?____________________

13. Are you… Male ❒ Female ❒

14. Are you of Aboriginal or Torres Strait Islander descent?
Yes ❒ No ❒

15. Do you speak a language other than English at home?
Yes ❒ What language?__________ No ❒

16. Where do you usually live?
(Name of suburb/locality/town or overseas country) ________________

17. What is your residential postcode?________

18. If you are visiting from an overseas country, tick this box ❒

19. What is the your highest level of education? (Tick ONE only)
Still at school ❒
Primary school ❒
Year 10 (or equivalent) ❒
Year 12 (or equivalent) ❒
TAFE Certificate (or equivalent) ❒
Advanced Diploma ❒
Undergraduate Degree ❒
Graduate Diploma/Certificate ❒
Postgraduate degree ❒

20. Do you use the Internet for… (Tick ALL boxes that apply)
- Email ❒
- To find out about things to do ❒
- To plan trips or holidays ❒
- To search for family activities ❒
- OR None of the above ❒
- I don't use the Internet ❒

21. What sort of exhibitions would you MOST like to see at this gallery? (Tick ALL boxes that apply)
- Painting ❒
- Sculpture ❒
- Ceramics/glass ❒
- Textiles ❒
- Drawing ❒
- Digital media arts/interactive media ❒
- Photography ❒
- Printmaking ❒
- Exhibitions of work by local artists ❒
- Social history exhibitions that address local issues ❒
- Celebrated works of art by well-known Australian artists ❒
- Celebrated works of art by well-known international artists ❒
- Live theatre/dance/music performance ❒
- Indigenous and/or Torres Strait Islander ❒
- Exhibitions for Children ❒
- Other (please specify) ❒ ____________________

22. IF YOU ARE A VISITOR TO THIS REGION, how long are you staying in the area?
One night (overnight) ❒ 2 to 3 nights ❒ 4 to 7 nights ❒ 8 nights or longer ❒

23. Did you stay in?

The home of a friend or relative ❒ Paid accommodation ❒

24. Thinking about the past 12 months, how many times have you been to a:

	Have not attended	Once	2 or 3 times	4 or 5 times	6 to 10 times	11 times or more
Another museum or gallery in Queensland						
If so, which one/ones?						
A museum or gallery anywhere else						
A public library (excluding school, college or university)						
A live classical music concert/opera						
A live theatre performance						
A live dance performance						
A live rock/pop concert						
A cinema or drive in						

25. What is your MAIN occupation? (Tick ONE only)

Full-time paid work ❒ as ______________________________

Home duties ❒

Part-time paid work ❒ as ______________________________

Retired ❒

Self-employed ❒ as ______________________________

Student ❒

Unemployed ❒

Other ❒ (please state) _________________________

26. Do you have a disability or other condition that impacted on your visit today?
Yes ❒ (please describe) ________________________
No ❒

27. Which of the following age groups are you in? (Tick ONE)
15-18 ❒
19-24 ❒
25-34 ❒
35-44 ❒
45-54 ❒
55-64 ❒
65 years+ ❒

28. What best describes your gross (before tax) annual household income, including pensions and benefits? (Tick ONE)
Under $20,000 ❒
$21,000 - $40,000 ❒
$41,000 - $60,000 ❒
$61,000 - $80,000 ❒
$81,000 - $100,000 ❒
$101,000 - $120,000 ❒
$121,000 + ❒