



 the audience agency

Audiences For Visual Arts

August 2019



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The Visual Arts not only offer us so much pleasurable experience and creative inspiration but are also central to our society and economy, engaged in their local communities and essential contributors to health, wellbeing, leisure and creative education.

Foreword by **Dr Paula Graham-Gazzard**, CEO Contemporary Visual Art Network, and **Margot Walker**, Head of Community Partnerships at The Audience Agency.

The work of visual artists and curators can be critical in fostering dialogue and contributing to positive social change, in creating spaces where communities can face challenging ideas constructively. Visual Arts contribute to the creative economy, to originality across the creative industries, to the vitality of our towns and cities and, crucially, to tourism. Visit Britain data in fact indicates visiting galleries and heritage centres to be the no.1 intention of overseas tourists to the UK. This report tells an encouraging story of a Visual Arts audience that is socially varied, intellectually curious and increasingly dominated by a new generation, enthusiastic to engage.

The England-based Visual Arts galleries that contribute to this report vary in scale from micro-independent, to local authority managed public collections and larger nationally funded spaces. With the majority of galleries now offering free admission, the challenges they face from reduced funding and an audience that continues to demand relevance make it more important than ever to harness the power of data in influencing and informing programming. We must continue to find innovative and informed ways in which to grow support from gallery goers, funders and community partners. Alongside this nationwide picture of Visual Arts attenders across the sector, we encourage galleries to also reflect on their local and regional profiles, as well as their own [Audience Finder](#) dashboards, to inform their unique audience development goals.





The Big Picture

What do we know about Visual Arts audiences?

Half of Visual Arts visitors belong to the highest culturally engaged Audience Spectrum groups.

Visual Arts attenders are younger than is true of most other artforms.

Visual Arts audiences reflect the ethnic makeup of the English population more closely than most other artforms.

Visitors are looking for reflection, to learn something and to be inspired.

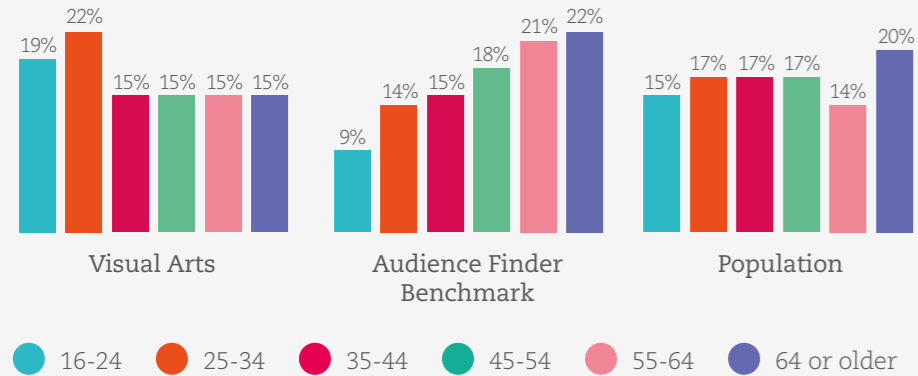
Data trends show variation in profiles and motivations across different kinds of Visual Arts.

Visual Arts audiences visit frequently and often alone or in adult groups.

Who visits Visual Arts galleries and activities?

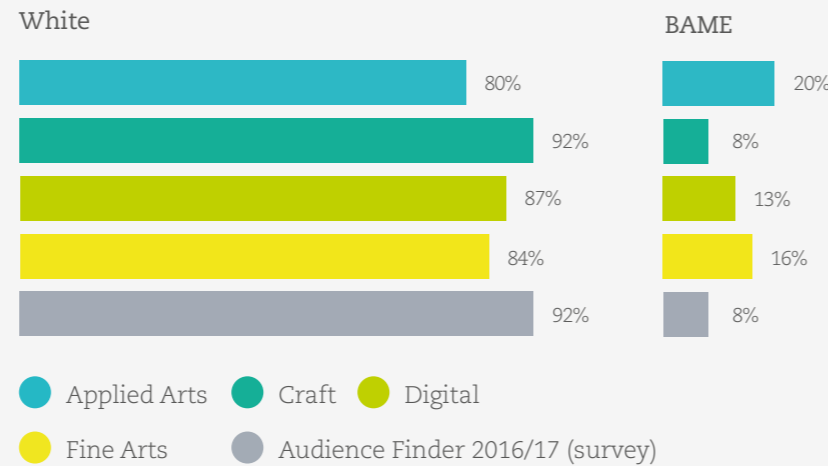
Over half of Visual Arts attenders represent the **highest culturally engaged** Audience Spectrum segments. These audiences are likely to participate in other cultural activities and be highly educated professionals who are relatively affluent compared to the wider population. Millennials are unusually well represented in Visual Arts attenders, while ethnicity varies substantially between different genres of Visual Art.

Age x Visual Arts x Audience Finder Benchmark x Population



- 41%** of **Visual Arts** audiences are aged **16-34**, compared with 13% for most artforms. 41% of **Museum** audiences are **over 65** years old
- Whilst audiences to most artforms increase with age, Visual Arts appeal disproportionately to **Generation Z**.
- Audiences **under the age of 35** are significantly overrepresented in Visual Arts attenders, compared with the population.

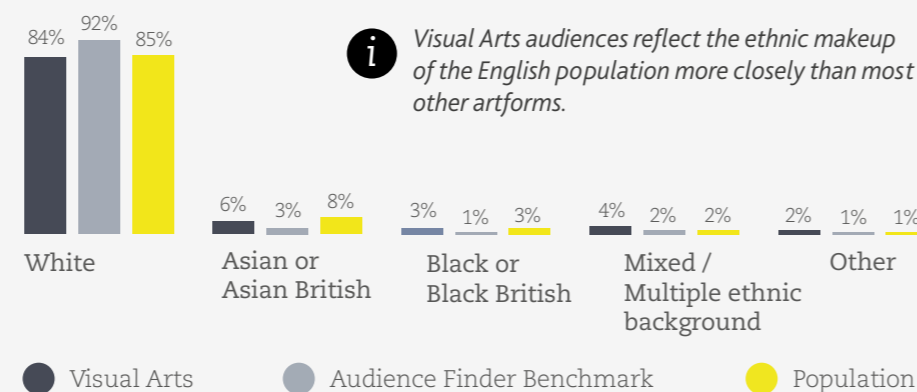
White/BAME x Visual Art Type



Applied Arts, which includes architecture and design, is particularly successful at attracting more ethnically diverse audiences: 20% of its visitors are BAME, compared with just 15% of the population.

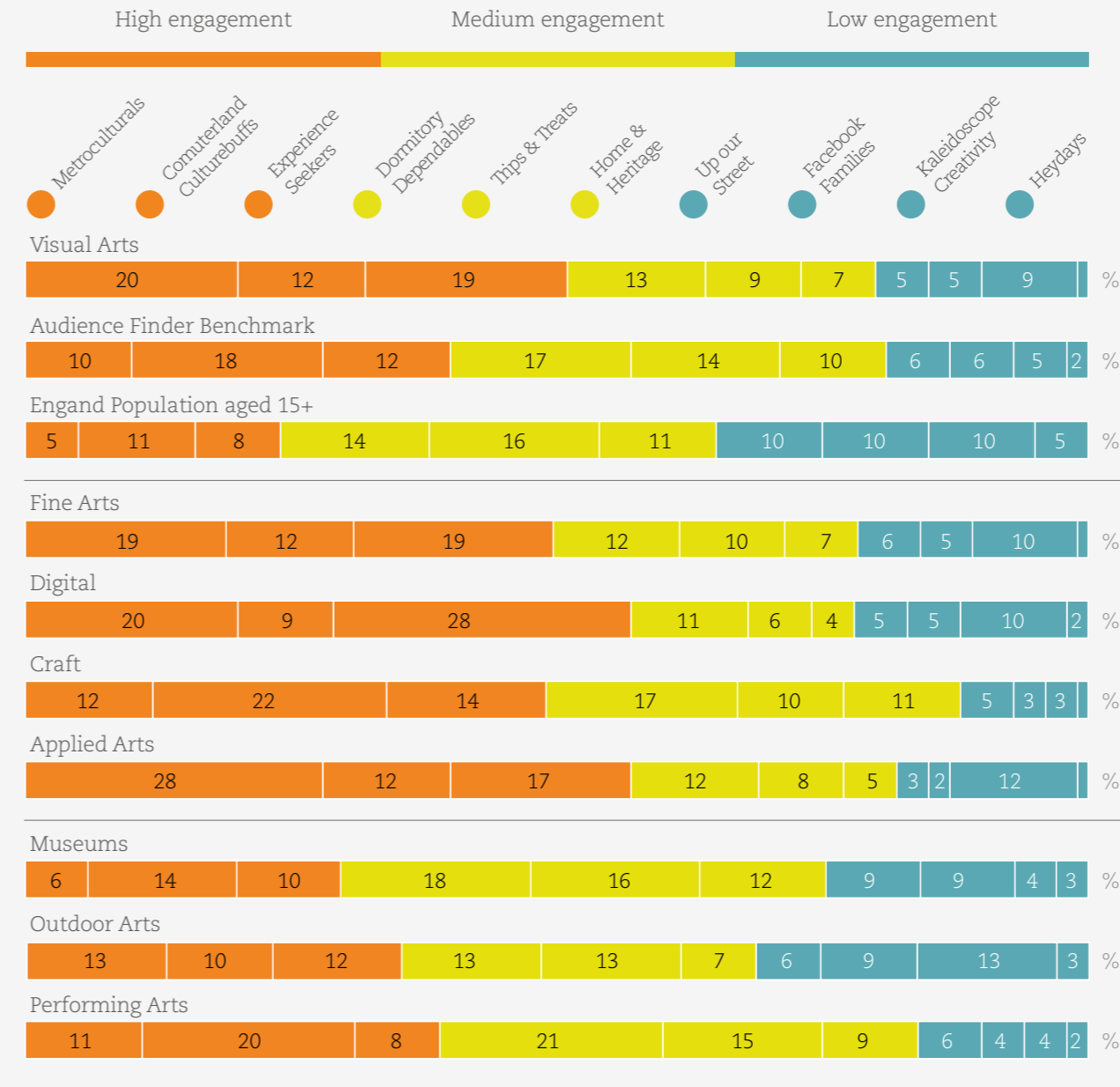
Crafts, on the other hand, is disproportionately dominated by white visitors, as is typical of many other forms of culture.

Ethnicity x Visual Arts x Audience Finder x Population



i Visual Arts audiences reflect the ethnic makeup of the English population more closely than most other artforms.

TOP TIP: Over half of gallery goers are highly engaged in cultural activity as part of their lifestyle and are likely to be open to becoming advocates and supporters.



Top Audience Spectrum Groups:

- 20%** **Metroculturals** Prosperous, liberal, urbanites interested in a very wide cultural spectrum.
- 19%** **Experience Seekers** Highly active, diverse, social and ambitious, engaging with arts on a regular basis.
- 13%** **Dormitory Dependables** Suburban and small towners interested in mainstream arts.
- 12%** **Commuterland Culturebuffs** Affluent and professional consumers of culture.

Different kinds of Visual Arts:

- While **Applied Arts** mainly attracts high cultural engagers, **Digital Arts** speaks more to **Experience Seekers** and **Metroculturals**.
- Crafts**, though, appeals to more traditional mainstream visitors including **Dormitory Dependables**, **Home & Heritage**.

Visual Arts vs other comparable artforms:

- Visual Arts audiences are more dominated by highly engaged Audience Spectrum groups than other comparable artforms.
- Galleries are significantly less representative of family dominated and other lower engaged groups, particularly compared to museums.

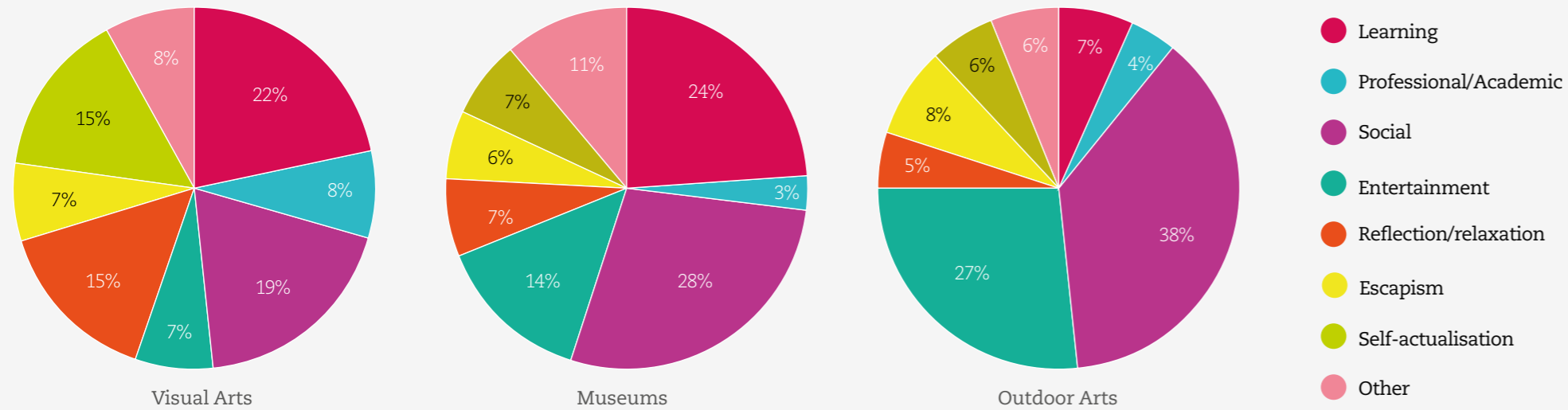
FOOD FOR THOUGHT: Drawing on these insights, how can Visual Arts galleries engage a more diverse audience within the community?

Why do they visit?

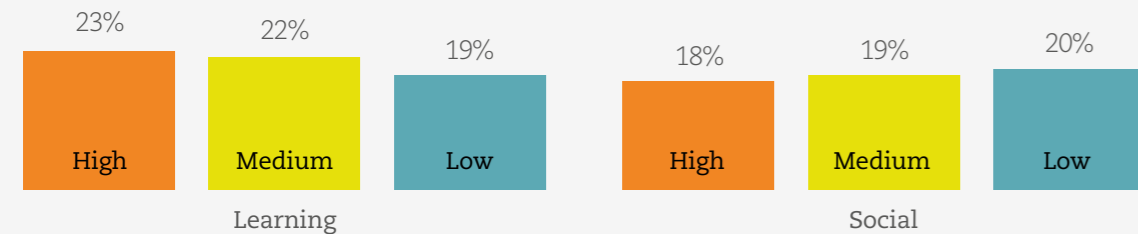
Visual Arts audiences often visit galleries for reasons linked to personal wellbeing and creative development: to be inspired, to learn and to find a space to relax and reflect. Visitors are more likely to engage with Visual Arts by themselves than is typical across other artforms, though social motivations are still strong, and galleries can represent a safe space for exploring ideas as well as spending leisure time. The significant number who cite professional motivations supports the idea of art galleries as a source of inspiration for feeding the creative economy as well as of enjoyment and relaxation.

- Motivations are more broadly spread for Visual Arts galleries than is true for many other artforms.
- While Social motivations are still important, Learning, Reflection and Self-actualisation are uncommonly strong motivators for Visual Arts audiences.
- Reflection, relaxation and self-actualisation motivations are decisively more prominent in Visual Arts audiences than for Museums or Outdoor Arts.

Main Motivations × Visual Arts / Museums / Outdoor Arts



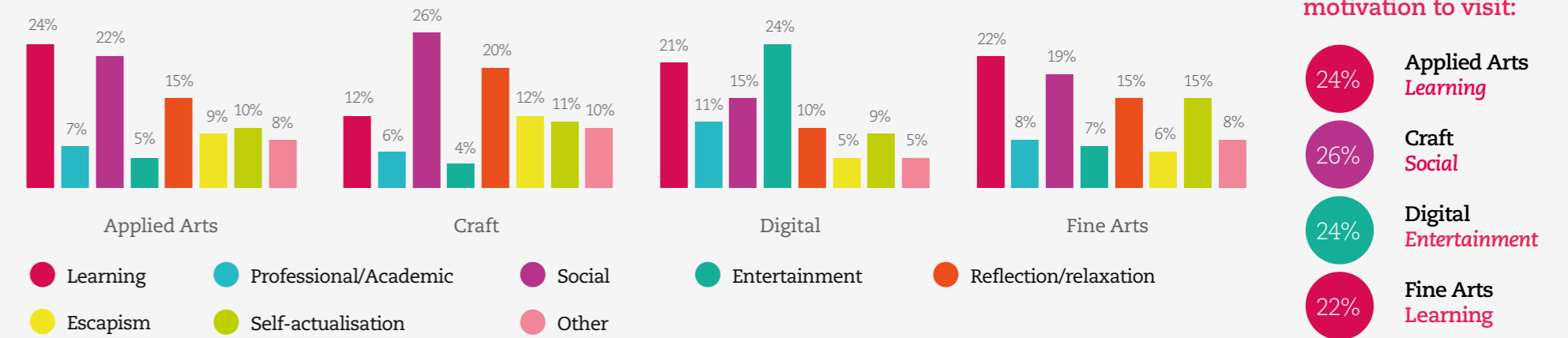
Social/Learning × Engagement Level



- Across all kinds of Visual Arts, **Learning** and **Socialising** are both key motivators.
- Whilst **Learning** motivations increase with cultural engagement level, however, the opposite is true for **Social** motivations, which are highest in low cultural engagers.

Combining the Audience Finder core survey with additional themes about the visitor experience, group composition and communication preferences can help to understand how to influence visitor behaviour.

Motivation × Visual Art Type



Most common motivation to visit:

- 24% Applied Arts Learning
- 26% Craft Social
- 24% Digital Entertainment
- 22% Fine Arts Learning

Top 5 specific reasons for visiting Visual Arts:

- 1 To be intellectually stimulated 45%
- 2 To be inspired 42%
- 3 To learn something 40%
- 4 Visual Arts are an important part of who I am 38%
- 5 To spend time with friends/family 32%

- When asked to identify an overall **main motivation** for their visit 15% say 'Learning' followed by 'Spending time with friends and family' and 'Doing something new/out of the ordinary'.
- **Over half** of the respondents who mentioned **professional motivations** for visiting are **frequent visitors**.
- **31%** of attenders whose main motivation is **professional or academic** are **willing to travel** over an hour to visit Visual Arts. Similarly, visitors motivated by a **special interest** travel the furthest distance.

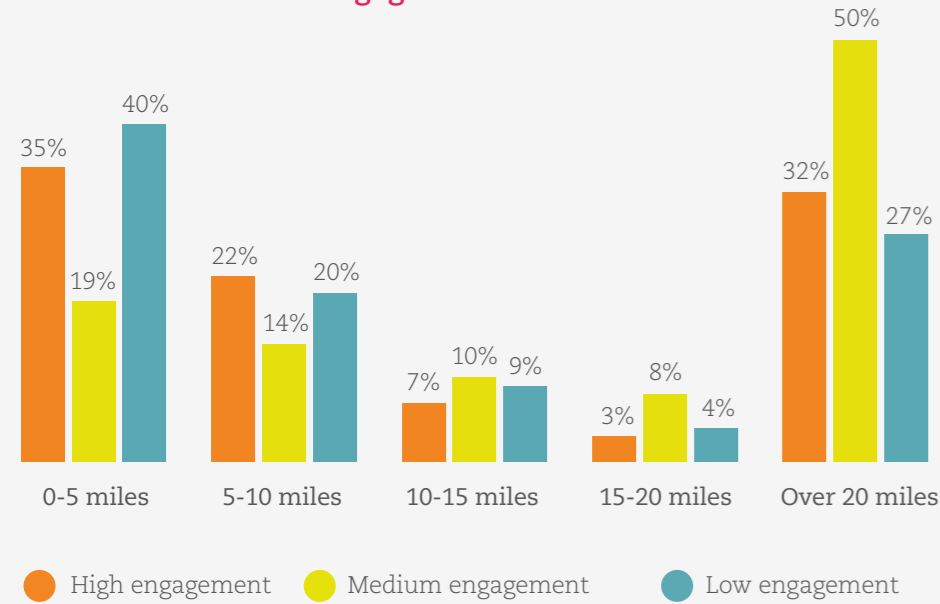
FOOD FOR THOUGHT:

Given the different motivations of audiences, how you can your gallery best communicate your overall offer and exceed their expectations?

Where do they come from?

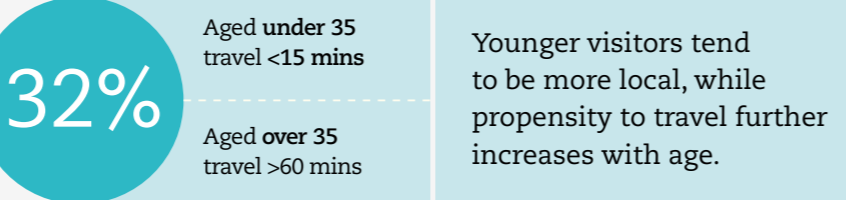
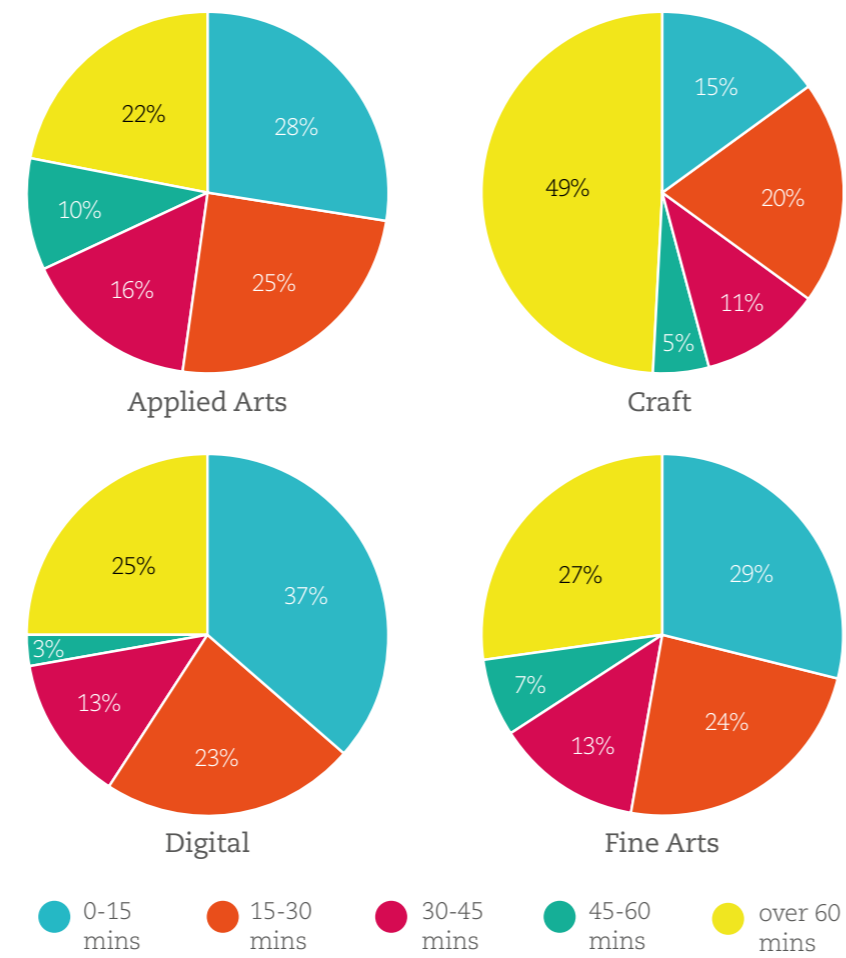
Similarly to Museums, over a third of all gallery attenders travel fewer than 15 minutes for their visit, with this 'localness' being even more prominent amongst family groups. Whilst highly engaged cultural visitors are more likely to travel further and be motivated by distinctive offers such as pioneering new exhibitions and behind the scenes tours, medium-to-low engagers tend to be attracted by the 'wrap-around offer' of a venue and area, as well as known artists and collections.

Distance travelled x engagement level



In line with the overall age profile of Visual Arts audiences, while youth-dominated Digital Arts engage a very local audience, Crafts attracts older visitors from farther afield.

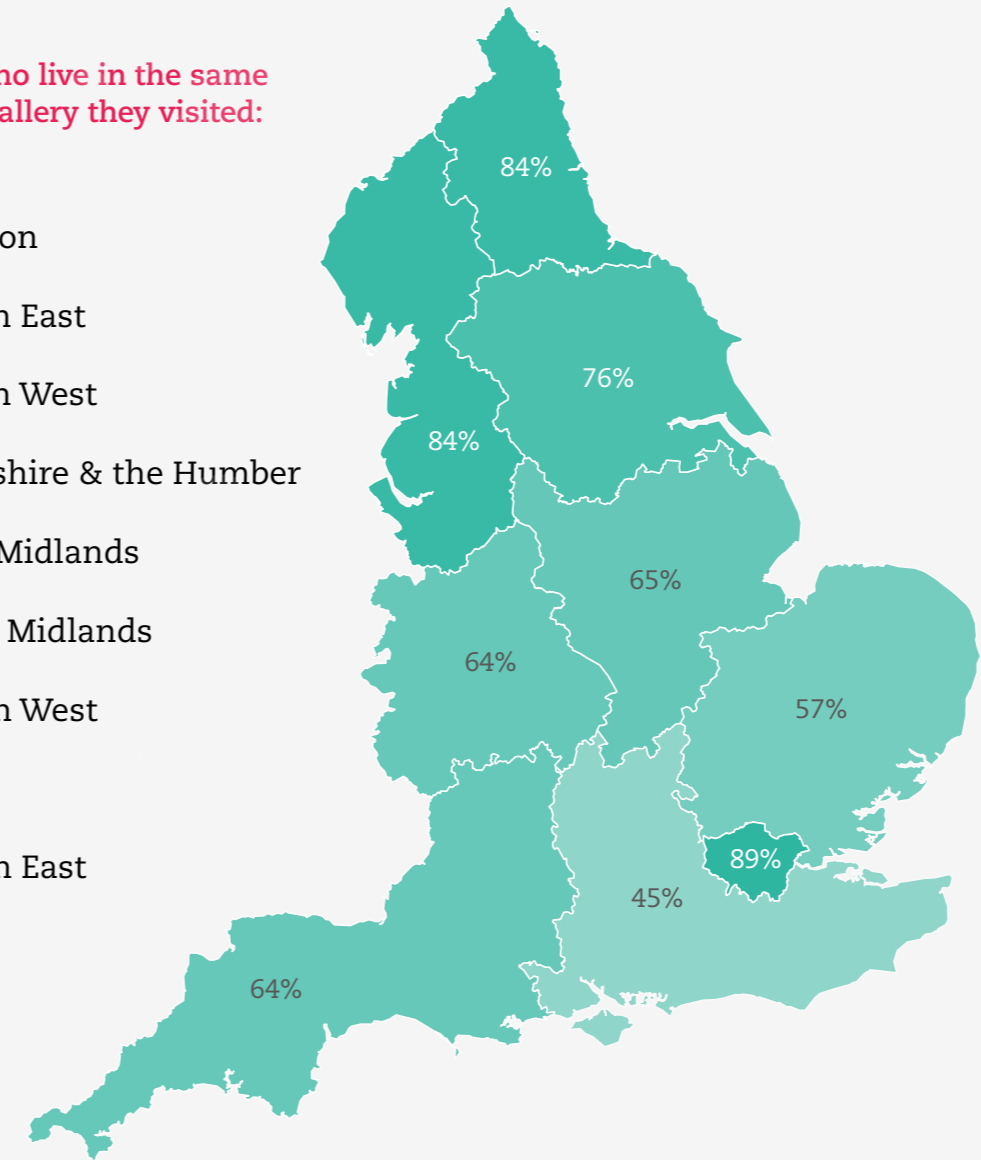
Visual arts types x drivetime



TOP TIP: Use the [Audience Finder](#) free mapping tool to visualise where your visitors come from and learn more about potential visitors in the same area by commissioning an [Area Profile Report](#).

% of visitors who live in the same region as the gallery they visited:

- 89% London
- 84% North East
- 84% North West
- 76% Yorkshire & the Humber
- 65% East Midlands
- 64% West Midlands
- 64% South West
- 57% East
- 45% South East



- 1/3** One third of Visual Arts visitors live within a 15-minute drive of the gallery they visited.
- >1hr** Audiences who live outside of London are more likely to travel over an hour to visit a Visual Art exhibition.
- 50%** In the North East, by contrast, 50% of visitors live within 15 minutes drive of the gallery they attend.
- >1hr** More than half of the galleries in the South East (54%) and South West (56%) attract affluent cultural tourists, travelling from over 60 minutes away.
- 15min** Galleries in non-metropolitan towns and rural areas engage the most with local audiences: over one third of their visitors come from a 15 minutes drive time radius.

FOOD FOR THOUGHT: Consider how your visitor profile changes seasonally and in response to programming. What could happen if you changed opening times?

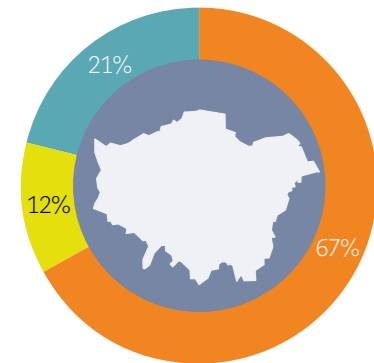
Who engages with Visual Arts as cultural tourists?

The London galleries in Audience Finder display a high proportion of contemporary visual works – including some small independent commercial galleries. This is in contrast to regional galleries, which are more locally funded and supplied with arts collections.

Spotlight on London Galleries

- Galleries in London are diverse, reaching a highly engaged audience, largely from London itself and the South East.
- Whilst 89% of Londoners visited exclusively London galleries, only 27% of UK based out-of-towners visited a gallery in the capital. The London gallery scene seems to serve a London-centric crowd.
- Professional and academic motivations are highest for visitors attending London galleries, as is self-actualisation.
- Visual Arts appeals more than other artforms to [Kaleidoscope Creativity](#), a less culturally engaged and particularly ethnically diverse group. This pattern is accentuated by the profile of London gallery goers.

Audience Spectrum Breakdown of London Gallery visitors:



- High engagement
- Medium engagement
- Low engagement

Metroculturals	42%
Commuterland Cuturebuffs	7%
Experience Seekers	18%
Dormitory Dependables	6%
Trips & Treats	3%
Home & Heritage	2%
Up Our street	2%
Facebook Families	2%
Kaleidoscope Creativity	17%
Heydays	0%

Spotlight on Metroculturals

42% of London galleries' audiences are **Metroculturals**

Metroculturals are generally prosperous, liberal urbanites who choose a city lifestyle for the broad cultural opportunity it affords. They are interested in a very wide spectrum of cultural activity and represent good prospects for new innovative work. Metroculturals are likely to be working in demanding but rewarding professions, are highly educated and have a wide variety of other interests.

Making up, as they do, almost half of London's Visual Arts audiences, not all Multiculturals have the same cultural habits. This substantial group can be divided in more depth:

5%

Captains of Classical

These extremely frequent visitors take in a range of venues and have very high expectations, which they are prepared to pay for.

12%

Leafy Media-types

Because culture is essential to their lives, they plan in advance and are prepared to travel as well as absorbing anything and everything local to them.

5%

City Selectors

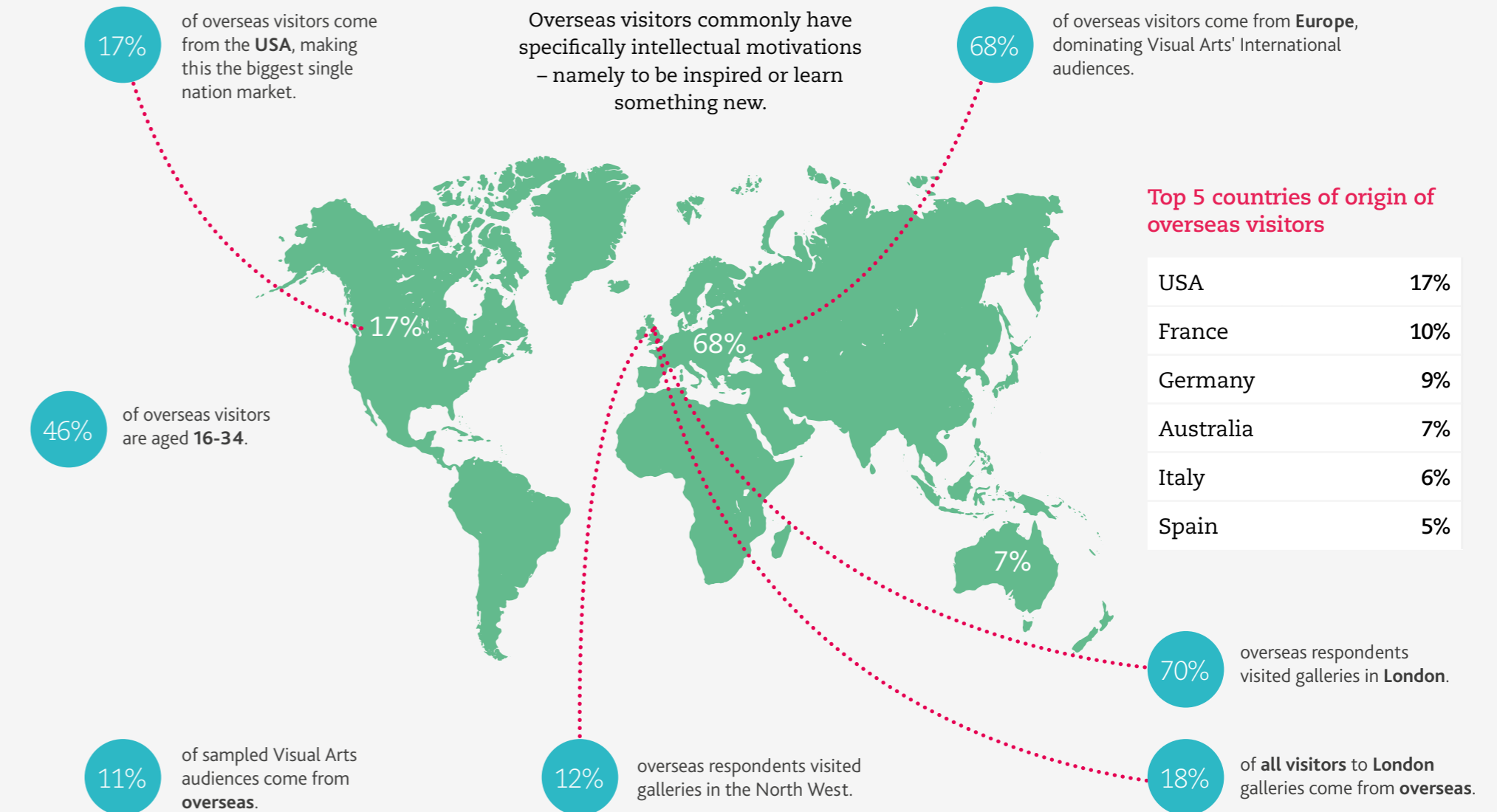
This international crowd plays hard and works hard. With less time and more money, they are discerning and expensive in their tastes and enjoy hospitality.

19%

Metro-eclectics

These young, ambitious, metro-intellectuals approach cultural engagement with enthusiasm and eclecticism. Their interests tend to be contemporary and their planning spontaneous.

Social media is a great way to reach inquisitive [Experience Seekers](#), who are prevalent within every culture. Find out from Visit Britain who are common visitors in your area and cultivate links with tourism providers and universities to welcome them.

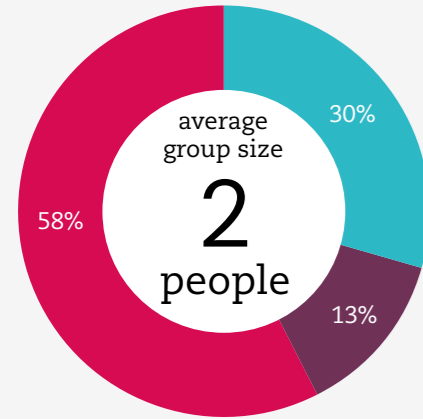


Visual Arts audiences are looking for creative experiences to be part of and share widely with their peer group - how can you extend your reach through Instagram?

How do they visit?

Visual Arts attracts a higher proportion of independent visitors, both young and old, than is typical of most artforms, whilst family audiences are significantly less present. Whilst 41% of visual art attendees surveyed are first time visitors, over 70% of those who have visited previously do so more than once a year, and often up to six times, as reliable returners to temporary programmes of exhibitions and activities.

Group Composition



Over half of Visual Arts audiences attend in **adult only groups**

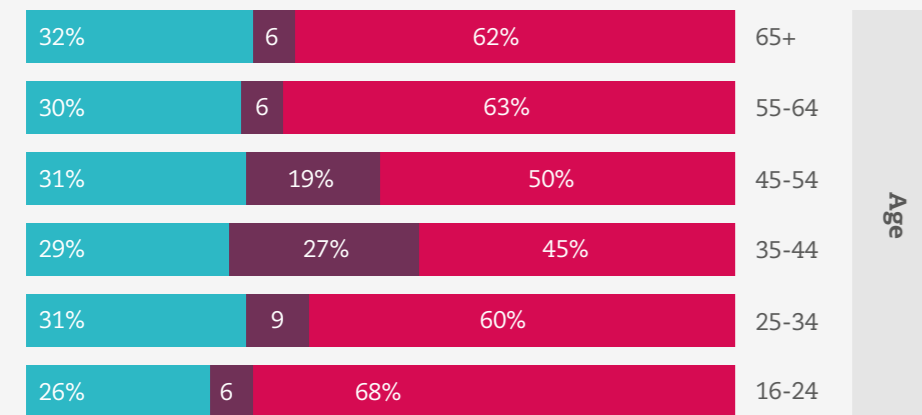
Single Adults are more prominent in **older audiences**, while **younger visitors** overwhelmingly attend in **social groups**.

- Single adult
- Families
- Adult Groups

Single Adults are significantly more prominent in Visual Arts audiences than audiences for comparable artforms.

Visual Arts	30%
Museums	20%
Outdoor Arts	18%

Group type x Age



Spotlight on Families



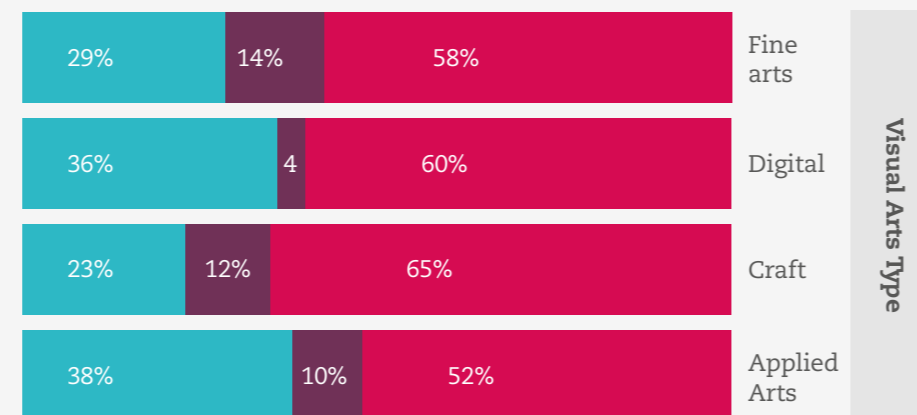
At **14%**, **Fine Arts** attracts a slightly higher percentage of families than other forms of visual arts, though the figure remains **low** compared with similar artforms.

Family groups are significantly more likely to go to local galleries, whereas **44%** of single adults and **51%** of adult groups are willing to travel more than **30 minutes** to visit a gallery.

Families are significantly less prominent in Visual Arts audiences than audiences for comparable artforms:

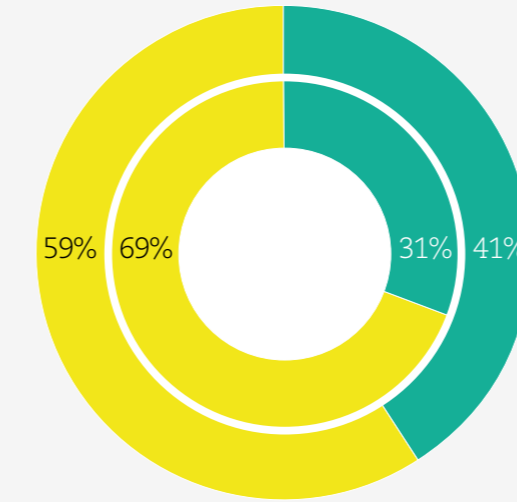
Visual Arts	13%
Museums	45%
Outdoor Arts	51%

Group type x Visual Arts types



TOP TIP: Use targeted marketing and **Audience Spectrum** profiling to identify and understand how to approach new and existing audiences.

Visitor Frequency

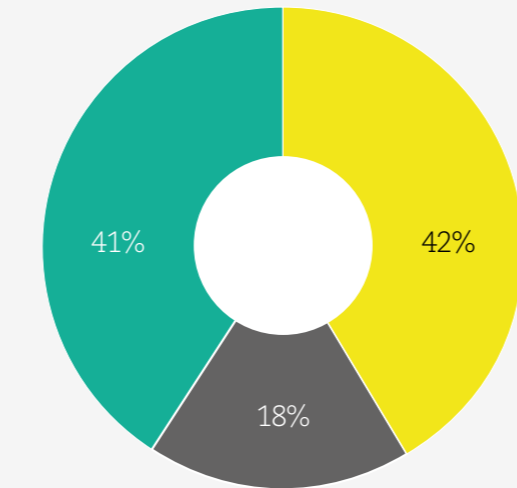


Outer Circle: Visual Arts

Inner Circle: Audience Finder Benchmark

- First Time Visitors
- Repeat Visitors

59% of visitors to Visual Arts are repeat visitors. Of these repeat visitors, **71%** have visited the gallery **more than once** in the last **12 months**.



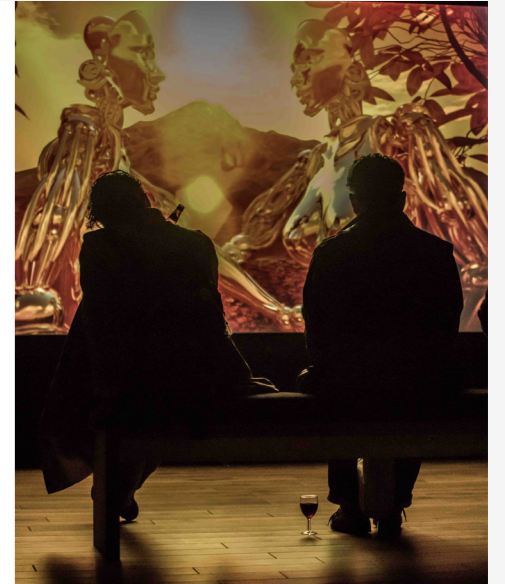
- First Time Visitors
- Frequent Visitors
- Lapsed Visitors

42% of Visual Arts audiences visit the same gallery **multiple times** a year.

For **museums** this is true of only **32%** of audiences.

Spotlight on Digital Arts

- Digital Arts** gallery audiences are the **most frequent** visitors. On average they attend **6 times a year**.
- Over half** of Digital Arts attendees are **Single Adults**.
- Digital Arts** audiences are dominated by **Experience Seekers** (28%) and **Metroculturals** (20%)
- They are primarily motivated by **entertainment** but are also keen to **learn**.



Frequent Fliers: Typical Profile

- People who frequent Visual Arts galleries are typically relatively local audiences who are over the age of 35 and attend in adult groups.
- They are commonly motivated by the desire for intellectual stimulation and believe Visual Arts to be an important part of who they are.



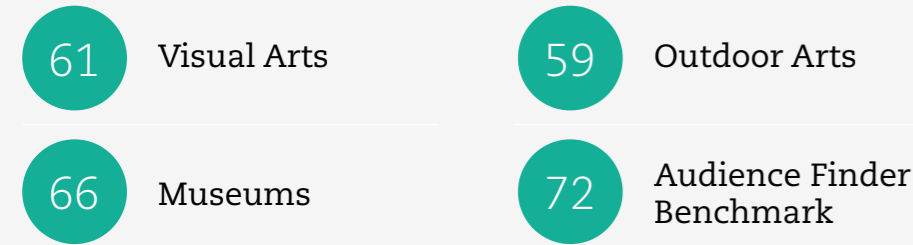
FOOD FOR THOUGHT: How can your gallery engage more with infrequent visitors? What are the barriers to them returning more often?

i Audiences expressing professional or academic motivations are the most frequent visitors.

What do they think of the experience?

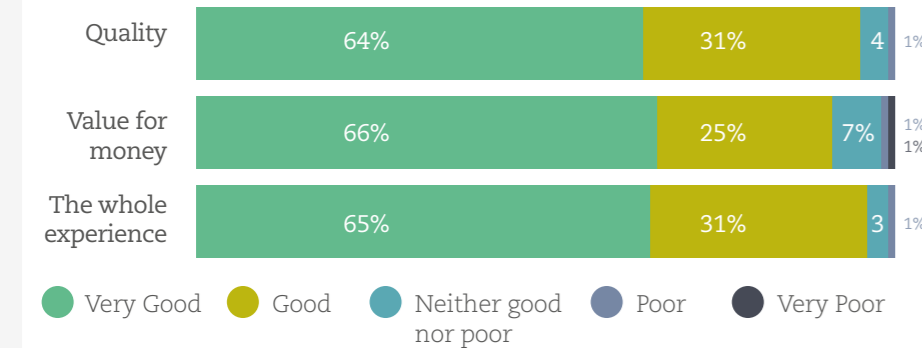
Respondents are asked to rate their visit in terms of quality, value for money and their overall experience. The Net Promoter Score (NPS) asks visitors to rate how highly they would recommend their experience to friends and families. As with other artforms, we can detect common themes of frequent visitors scoring more highly, while younger and overseas visitors tend to exhibit lower satisfaction levels.

Net Promoter Scores for...



- Visual Arts audiences' NPSs are similar to those for Museums and Outdoor Arts but lower than the overall Audience Finder Benchmark.
- At 64%, single adults give the highest NPS scores

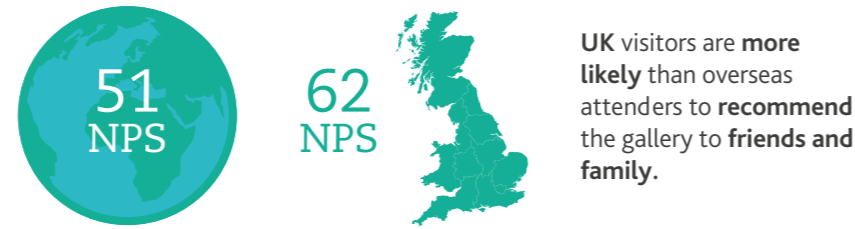
How would you rate....?



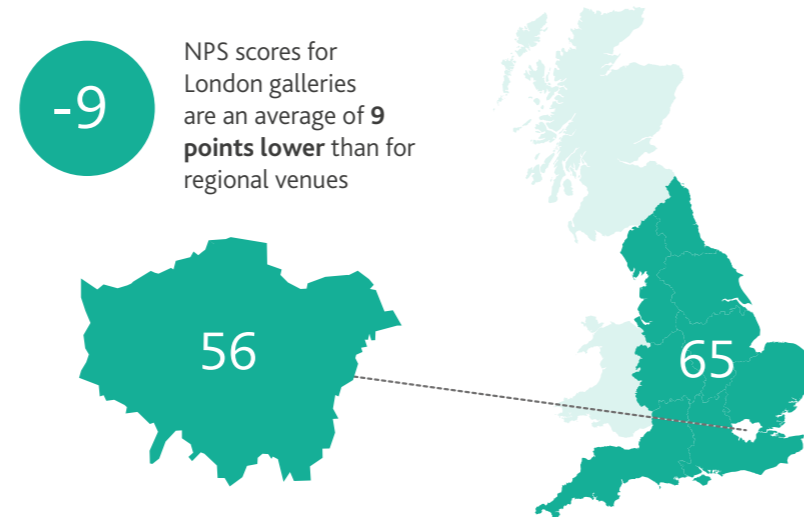
Net Promoter Scores

Your Net Promoter Score (NPS) is an average score based on how likely your audiences are to recommend you to other people.

UK vs International Visitors



London vs Non-London

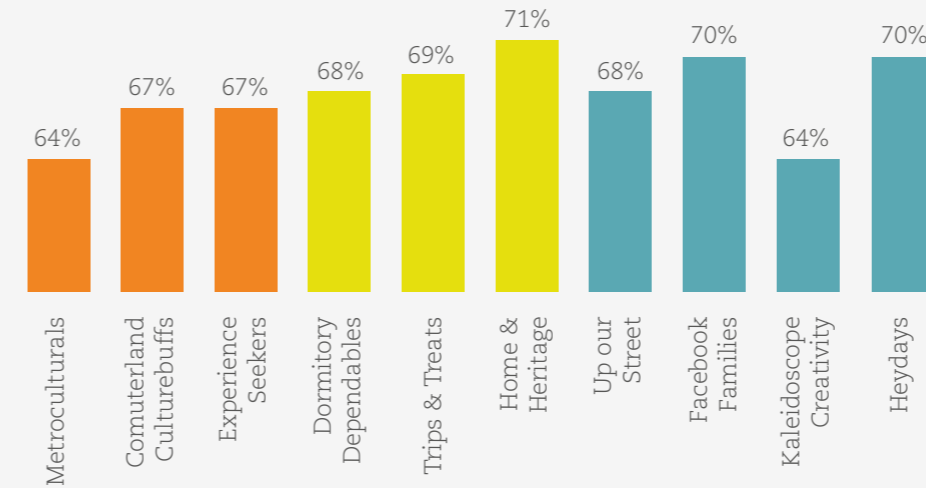


Audience Finder provides a benchmarkable approach for rating visitor satisfaction. A combination of research methodologies is the most effective way to understand the visitor journey and impact of visitor experience.

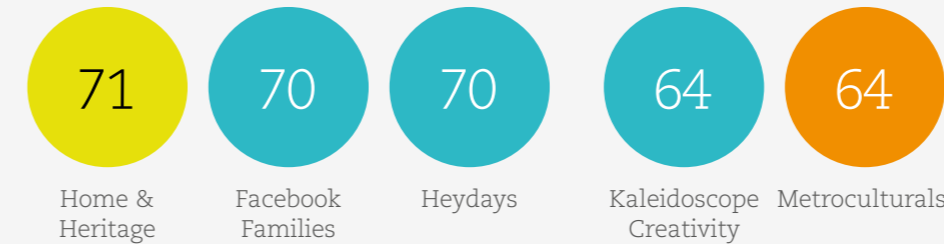


NPS scores vary considerably across Audience Spectrum groups.

NPS x Audience Spectrum



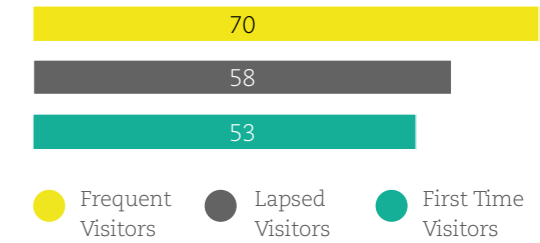
The most satisfied Audience Spectrum groups are:



Net Promoter Score by...

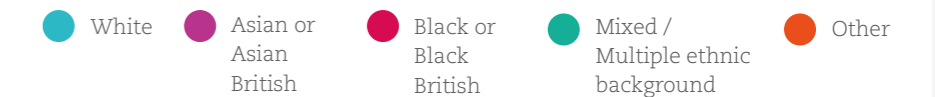
...Visitor Frequency

Frequent visitors return the highest NPS scores, whilst First Time Visitors are the least likely to recommend the gallery to friends and family.



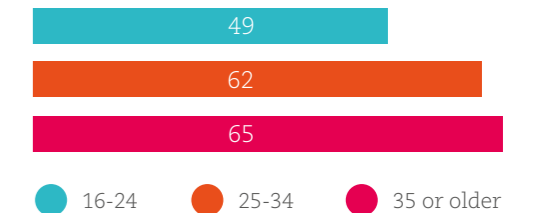
...Ethnicity

While NPS scores vary very little by ethnicity, they are typically lowest among Asian or Asian British audiences (52) and highest among Black or Black British audiences (65).



...Age

NPS scores increase with age, with visitors over 35 typically scoring their experience 16 points higher than 16-24 year olds.



FOOD FOR THOUGHT:

Are you open to criticism? Negative or indifferent feedback can be extremely useful in driving change and galvanising a fresh approach to engagement, programming and improving facilities.

Key Target Markets and Challenges

Singletons

- The fact that a third of adult visitors attend alone suggests galleries to represent a safe space for exploring individual identity, reflection and finding inspiration.
- Significantly fewer families visit Visual Arts Galleries than Museums, where objects and stories of social history, archaeology, natural history and more activity-based experiences often prevail.
- Considering that most galleries are free of charge, entry cost is not necessarily what is making visitors with lower levels of cultural experience and different needs feel less welcome. Understanding what these barriers might be then remains one of the greatest challenges facing Visual Arts.

Cultural Tourists

- Visit Britain research shows that going to art galleries features highly on the to-do list for both foreign and domestic tourists in the UK, with city destinations being especially popular.
- Cultural tourists invest time and resources into consuming Visual Arts throughout the year. They are amongst the highest spenders and are the most likely visitors to research and plan visits based on interest and high-quality experience.
- There is an under-tapped opportunity for galleries to share data amongst themselves and link with partner tourism providers in their area, to ensure that they are presenting their offer in the same arenas in which the Cultural Tourists are researching and planning their trips.

Skyscrapers

- Highfliers and city dwellers make up a significant facet of Visual Arts' core audience base and attracts an often younger, more affluent and highly culturally engaged consumer than is typical of most other artforms.
- 41% of this target market is aged under 35 and motivated both by enjoying the art for its own sake and satisfying social needs, as well as learning and experiencing something new.
- The challenge is to retain the interest and loyalty of this group through increasing opportunities for them to engage on their own terms, such as through late-night openings and premium experiences.
- These audiences are strong influencers in their social group and there is significant opportunity to capitalise on their intrinsic peer-to-peer marketing on social media.

Contemporary Creatives

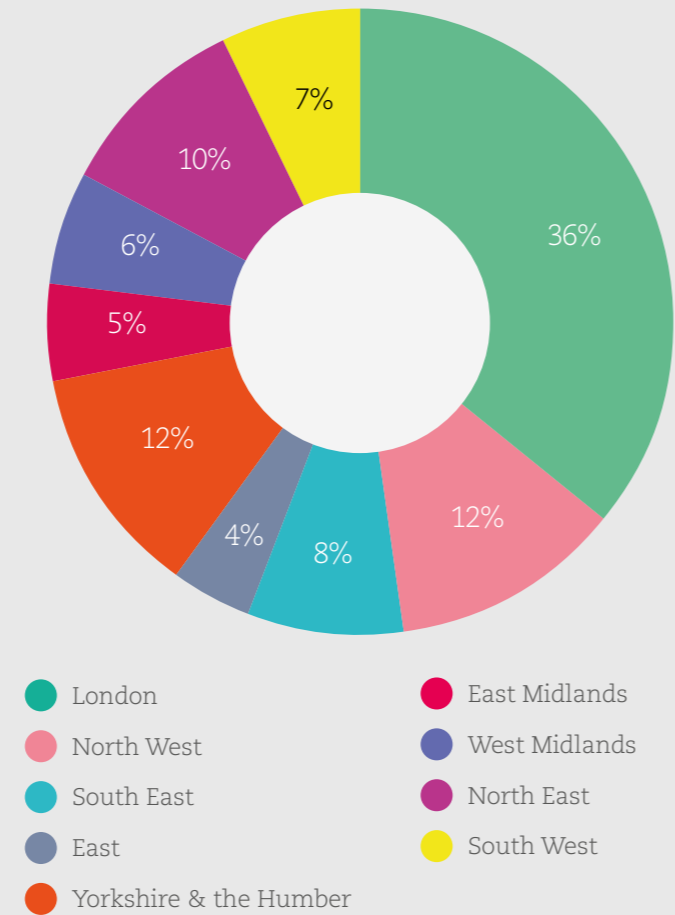
- The creative industries form a large part of the national and most regional economies, generating income and vibrancy from skilled workers.
- Galleries are frequented by academics and artists who draw on them for inspiration and as a source for personal study. These visitors often participate in creative activities and avidly consume visual art through a range of platforms and media.
- As formal art education is eroded from the curriculum and rising higher education costs continue to restrict participation, galleries can seize the opportunity to lead on supporting contemporary art practice.
- Nurturing a desire to experiment and enjoy art by providing spaces and experiences that accommodate the lifestyle and aspirations of people of all ages is crucial to capitalising on the current appetite.



Participating Visual Art Organisations

- | | | |
|--------------------------------------|----------------------------------|-----------------------------|
| 20-21 Visual Arts Centre | FACT | New Art Exchange |
| Abbott Hall | Falmouth Art Gallery | New Contemporaries |
| Action Space | Film and Video Umbrella | Newlyn Art Gallery |
| Arnolfini | Firstsite | Northern Print |
| Arts Catalyst | Focal Point Gallery | Nottingham Contemporary |
| Auto Italia | Forma Arts | Open Eye Gallery |
| Autograph ABP | Gasworks | Pallant House |
| Baltic | Grand Union | Peckham Platform |
| Barber Institute of Fine Arts | Graves Art Gallery | Peer |
| Barbican Art Gallery | Grundy Art Gallery | Serpentine Galleries |
| Barbican Curve | Harris Museum and Art Gallery | Shape Arts |
| Berwick Film and Media Arts Festival | Hartlepool Art Gallery | Somerset Art Works |
| Blackwell | Hatton Gallery | South London Gallery |
| Bowes Museum | Hayward Gallery | SPACE |
| Camden Arts Centre | ICA | Spike Island |
| Cass Sculpture Foundation | Ikon Gallery | Tate Liverpool |
| Castlefield Gallery | Impressions Gallery | Tate Modern |
| Centre for Chinese Contemporary Art | Intoart | The Art House |
| CGP London | Jerwood Space | The Hepworth Wakefield |
| Chisenhale Gallery | Kettles Yard | The Lowry |
| Collect Crafts Council | Laing Art Gallery | The New Art Gallery Walsall |
| Cooper Art Gallery | Leeds Art Gallery | The Otolith Group |
| Courtauld Gallery | Leicester Print Workshop | The Photographers Gallery |
| Craftspace | Lighthouse | The Showroom |
| Crescent Arts | LUX | The Tetley |
| Cubitt Gallery | Manchester Art Gallery | Thelma Hulbert Gallery |
| De La Warr Pavillion | Manchester Craft & Design Centre | Threshold Studios |
| Derby Museum and Art Gallery | Matts Gallery | Tullie House |
| Design Museum | Meadow Arts | Turner Contemporary |
| Devon Guild of Craftsmen | Millennium Gallery | Vane |
| Dorman Museum | MIMA | Victoria and Albert Museum |
| Drawing Room | MK Gallery | Whitechapel Gallery |
| East Street Arts | Modern Art Oxford | William Morris Gallery |
| Fabrica | Moore Institute | Wysing Arts Centre |
| | Mosaic Rooms | York Art Gallery |

% Audience Finder Data Contributing Galleries x Region 2017/18



Context and Methodology

Background and Methodology

Over the past three years, The Audience Agency has collaborated with the Visual Arts sector using Audience Finder to better understand audiences for Visual Arts and support the sector to make the case for the impacts of its work. The data included in this report was collected in the 2017-18 benchmark year by from 55,000 visitors to 104 galleries across England. Comparisons made in the report are between the stated sample, England population data as per the 2011 census and the benchmark year 2016-2017 Audience Finder dataset of other artforms (Audience Finder benchmark), which represents 800+ organisations and 30% of households in England. Anecdotal comparisons have also been made with the joint The Audience Agency and CVAN Visual Arts Report 2014/15, Taking Part Report 2017 and Visit Britain tourism stats.

Audience Finder

Audience Finder is a national audience development and data aggregation programme, enabling cultural organisations to share, compare and apply insight. It is developed and managed by The Audience Agency for and with the cultural sector and is funded by the National Lottery through Arts Council England. Audience Finder provides tools for collecting and analysing data in a standardised way which builds a clear picture of audiences locally and nationally. The results help organisations to find new audience opportunities using a range of tools, features and support. These include user-friendly reporting dashboards, online mapping and insight tools and the opportunity to work in collaborative, data-sharing groups.

Audience Spectrum

Audience Spectrum segments the whole UK population by their attitudes towards culture, and by what they like to see and do. There are 10 different Audience Spectrum profiles that you can use to understand who lives in your local area, what your current audiences are like, and what you could do to build new ones. Audience Spectrum is the most accurate tool the sector has ever had to help target audiences and include a wider public. Analysis and customer tagging with Audience Spectrum work at both household and postcode levels, to help cultural organisations understand audience profile and reach, enabling really accurate targeting of activity and communications.

Get in touch to find out more

More about Visual Arts audiences

To discover more about research into audiences for visual arts, or if you would like to contribute, contact:

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Disclaimer

The information contained within this report is not intended to be used as the sole basis for any business decision and is based upon data that is provided by third parties, the accuracy and/or completeness of which it would not be possible and/or economically viable for The Audience Agency to guarantee.

The Audience Agency's services also involve models and techniques based on statistical analysis, probability and predictive behaviour. Accordingly, The Audience Agency is not able to accept any liability for any inaccuracy, incompleteness or other error in this report.

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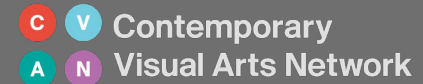
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