National Visual Arts

2014/15 Cluster Benchmark Report

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Introduction

This report provides an overview of the research undertaken into audiences for Visual Arts through the National Visual Arts (NVA) cluster of the Audience Finder programme in 2014/15. The cluster continues to work together and the research programme is being continued through 2015/16. This report outlines the main findings of the research; explores some of the implications for the sector; and provides a series of recommendations. This report is based on the research results, and the expertise and experience of The Audience Agency in using research to provide actionable insight. However, the reflections of organisations and individuals working in the sector will add additional perspectives and interpretations of some of the information. To facilitate this level of analysis and conversation, the detailed results are provided in Appendix ii.

We are very grateful to those who contributed data and made this initiative possible, especially the Contemporary Visual Arts Network (CVAN) which has been our main partner for this sector cluster.

Audience Finder National Visual Arts Sector Cluster in partnership with CVAN

Audience Finder is a national initiative funded by Arts Council England and designed by The Audience Agency to help arts and cultural organisations to understand their audiences. By using consistent standards of research and data collection it helps organisations to consider the implications for their work and planning. Using a national framework, it enables comparable audience information to be collected, using industry measures and benchmarks alongside tools and support to help cultural organisations put this knowledge into practice.

Audience Finder aims to help participating organisations and whole sectors to understand:

- Who are our audiences?
- Where do they come from?
- What do they do?
- What do they think?
- How do we interact with all this data?

It is a ‘give-and-gain’ model in which organisations agree to align and share audience information for greater insight. Co-operation in clusters makes it possible to look at the shared needs and agendas of similar organisations, working together to discover elements in common. The NVA sector cluster is a partnership with CVAN, which has acted as an adviser, interpreter and disseminator of the project.

Key questions for the National Visual Arts sector

The design of the research was formed in consultation with CVAN networks across the country in order to ensure that the research identified the issues of critical importance to the development of audiences and of the sector.

Together, we prioritised the following research questions:

1. How do visitors describe and rate the quality of their visit?
2. How important are galleries as drivers of visits to their local area?
3. What is the value of the economic activity generated by gallery visitors?
4. What is the profile of gallery visitors ?
5. What are the attendance patterns ?
6. What are implications of the above for sector advocacy and audience development?

A note about London galleries

Galleries in London had already been working togather to collect audience data for three years prior to the introduction of Audience Finder, and they continued to do so with their existing survey questions during 2014/15. Some data is comparable across both surveys whilst other questions were asked only amongst the NVA cluster. This means that some of the findings are applicable to galleries across England, whilst other results exclude London galleries. This is clearly noted in the relevant section of the report, and further detail on which galleries contributed to each benchmark is given in participating galleries individual reports.

Methodology

A standard set of primary research questions was developed based on the research priorities identified above. Fieldwork was carried out between July 1st 2014 and March 31st 2015 and was conducted using an interviewer led approach with organisations' staff (or volunteers) using questionnaires. Organisations who were also involved in a geographic cluster, in addition to this sector cluster, had the option to collect data using one of the following methods:

- Interviewer led face to face surveying undertaken by venue staff (or volunteers)
- Collection of e-mail addresses and venues sending out a link to an e-survey

A number of galleries also contributed data collected through different survey mechanisms, outside of the Audience Finder framework.

A total of 59 organisations took part in the research (36 outside of London and 23 in London) and the total sample was 25,830 (see Appendix i for the full list of participating galleries).

Weighting

The overall benchmarks are weighted by gallery size (in terms of number of visitors over the 2014/15 benchmarking period). This means the benchmarks are representative of the galleries' combined audience, and galleries with more visitors have a larger impact on the benchmarks.

Diversity and smaller organisations

One of the strengths of this report is that it represents a broad range of galleries and organisations presenting contemporary visual arts in different contexts – ranging from mixed art form venues (including local authority museums and galleries) through regional flagship organisations, to smaller artist led spaces and agencies presenting work outside the gallery context; urban as well as rural organisations. This diversity means we can be confident that the results do truly represent audiences for the visual arts. However, we recognize that for many smaller organisations the resources required to interview visitors and input the resulting data is considerable, and we are particularly thankful to those smaller organisations who contributed audience data.

Headlines

The headlines from this year's report are:

- Galleries play a significant role in the visitor economy; one in three visitors who attended the galleries had planned their trip to that area especially to visit that particular gallery, and these visitors generated an estimated total £25 million total new spend to their local areas in 2014/15.
- Galleries play an important part in their local communities; with visitors from the local area (within 15 minutes' drive time) making up on average 34% of the visitors to a gallery.
- Gallery visitors are regular and loyal attenders; in 2014/15, around half of the visitors surveyed had visited the gallery previously within the last 12 months, and on average, they made three visits during this period.
- Galleries are providing a quality visit experience; visitors report high levels of overall satisfaction, with 'Memorability' and 'Desire to repeat' scoring particularly highly.
- Galleries are successful at attracting a broad range of visitors; they are particularly effective at attracting younger and older visitors as well as those from minority ethnic groups.
- Galleries outside of London are particularly effective at reaching audiences who are mid – rather than high – engagers with the arts, and whilst galleries in London attract significant proportions of highly engaged visitors, almost one in six of London gallery visitors are from the three lowest engaged Audience Spectrum groups.

The Findings

The detailed results tables and charts can be found in Appendix ii. Here we concentrate on the key issues identified which have relevance for stakeholders and those working in the sector.

How do visitors describe and rate their quality of their visit experience?

A consistent theme in the planning meetings for this research was that visual arts professionals want to be able to better understand how visitors describe the quality of their visit. Rather than reporting on practical aspects of the visit such as signage and café facilities, galleries wanted to understand the impacts of their programming decisions; discovering how visitors *felt* as a result of their exhibition experience.

Whilst measuring the quality of experience is a key priority for Arts Council England, it is by definition, a rich and complex area which is challenging to define and conceptualise in a consistent way[1]. We considered that the most relevant and useful model for this research was previous qualitative visitor research commissioned by CVAN in the South West around quality of experience[2]. This study described a model of quality of experience with the following elements:

- Emotional
- Social
- Intellectual
- Memorability
- Desire to repeat the experience

A quantitative study has, by definition, limitations in terms of exploring qualitative experience. However, the results offer a useful overview of the public's experience of visual arts whilst enabling individual organisations to understand their own positioning and potential.

These results illustrate findings for galleries excluding London.

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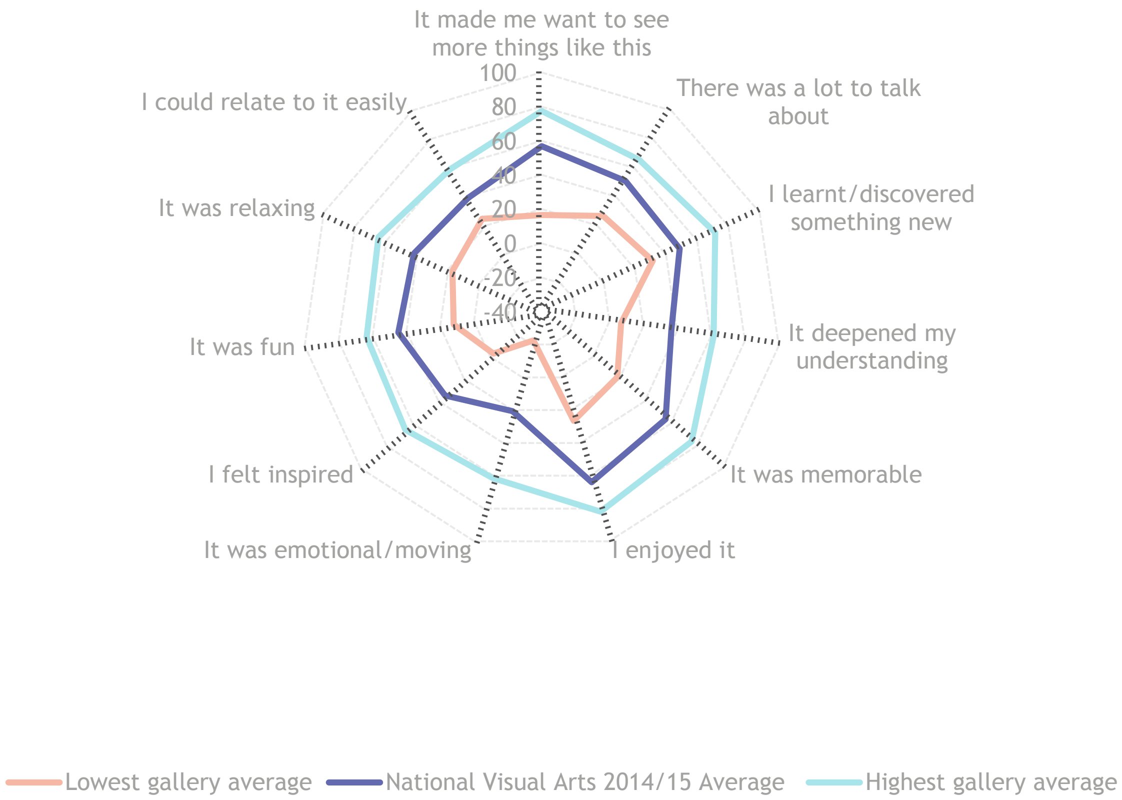
[1] See, for example, http://www.culturemetricsresearch.com/about-the-project/

[2] Quality of Experience in the Arts, Annabel Jackson Associates 2012.

Exhibition experience ratings

Respondents were asked to respond to a number of statements about their visit, developed from the quality of experience elements listed above. Responses ranged from "Strongly agree" to "Strongly disagree". Index scores are given from -100 (all respondents answering "Strongly disagree") to +100 (all respondents answering "agree"). The higher the score plotted on the radar chart, the higher the percentage of respondents that rated an element positively.



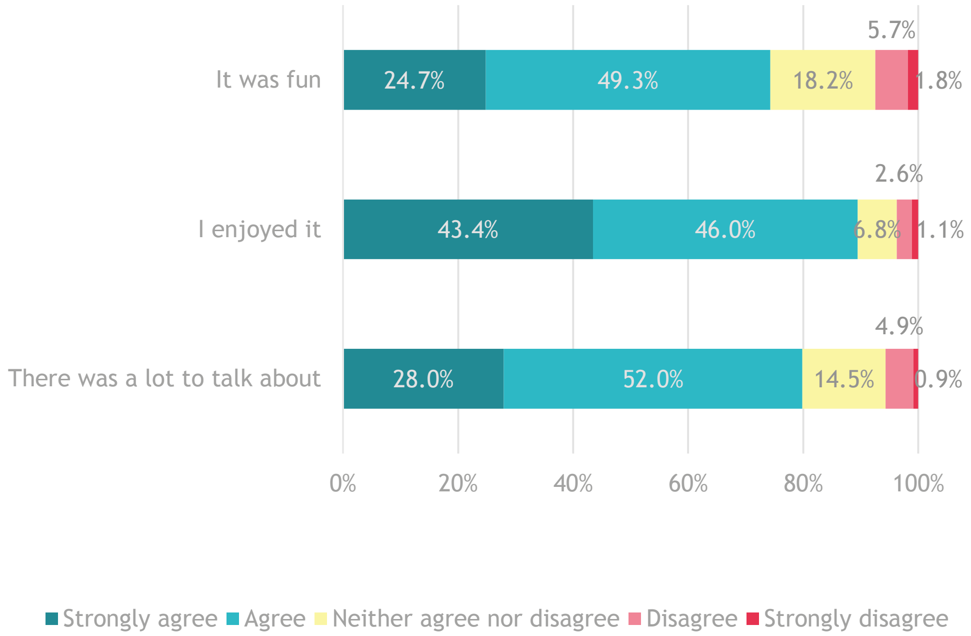
We can see that the responses show a consistent pattern across the participating galleries; suggesting that galleries in the sector are generally offering similar visit experiences.

Visitors clearly had positive experiences, and were most confident to express this through the universal: 'I enjoyed it', which achieved the highest ratings on average.

'Memorability' and 'Desire to repeat' are the particular quality elements which achieve the highest average ratings, whilst providing an 'Emotional' experience, the lowest.

However, there are distinct variations in ratings for particular elements, and galleries at the upper and lower levels might want to explore some of these findings in more detail to explain the variations, or look for patterns across difference types of experience or programming. The ‘Emotional’, ‘Desire to repeat’ and ‘Memorability’ elements are those with the widest variation between high and low scoring galleries.

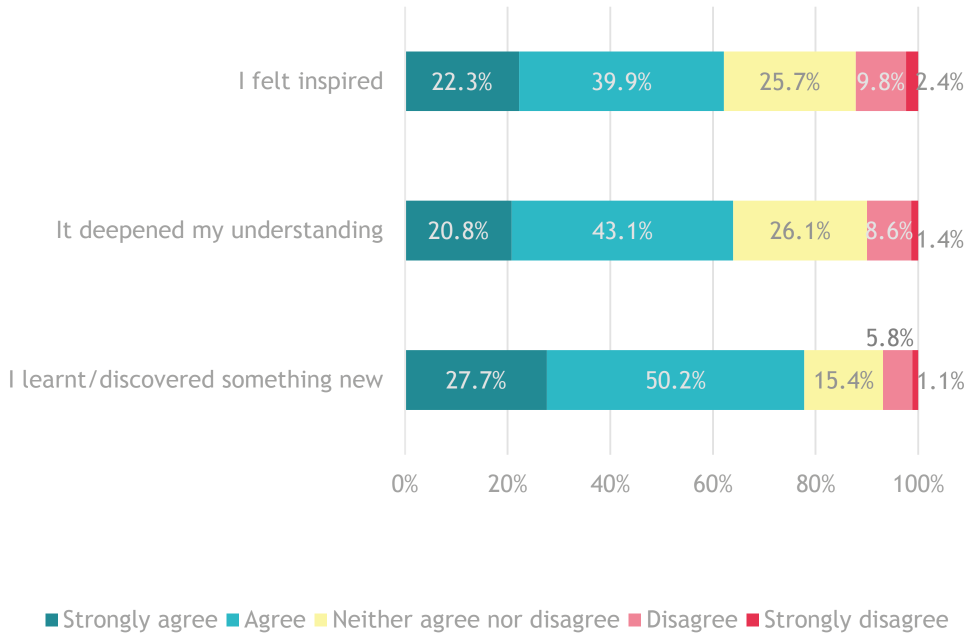
A social experience



89% of respondents to the galleries agreed or strongly agreed that they had enjoyed the visit, the highest average score given to any of the quality statements. The other social aspects of the visit also scored highly and this was reflected in the high number of positive comments given by respondents

> *A lovely surprise to discover this gallery, we have never been to [city] before and the visit was very enjoyable.*
>
> *I am a regular here and I always enjoy my experience here.*
>
> *A wonderful venue where self-esteem can grow. A wealth of opportunities for enjoyment of the arts in all its forms*

An intellectual experience



Generally respondents appear to be having an intellectual experience from their visit, with 78% of respondents agreeing or strongly agreeing that they had learnt or discovered something new during this visit.

> *It was very informative, I learnt some new things.*

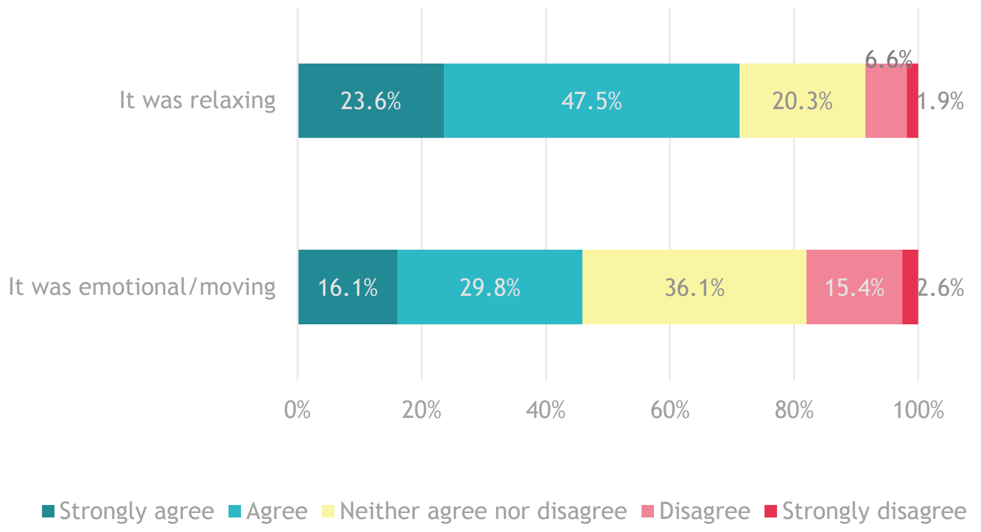
> *It was interesting, not what I would normally visit.*

Respondents also agreed or strongly agreed that they felt inspired by the work that they had seen.

> *Leaving feeling very inspired and wanting to get my paints out.*

> *I liked how it taught me a lot about Art and inspired me to make work and try different ideas*

An emotional experience



71% of respondents either strongly agreed or agreed that their exhibition experience was relaxing.

> *Very calming and allows you to take your mind elsewhere.*

Inclusion of this element does not indicate that galleries should necessarily aspire to offer a relaxing experience, but it is one of the emotional impacts of arts going often reported by audiences and visitors[3]. Indeed in those cases where respondents disagreed that the exhibition experience was relaxing, this was not necessarily a negative reaction. For example one respondent commented that:

> *It was not relaxing because the exhibition made me feel uncomfortable, but not in a bad way*

When asked whether they found the exhibition experience emotional or moving, only 45% of respondents agreed or strongly agreed. This area was the one which scored least highly overall and showed the widest variation between individual galleries. This reflects the

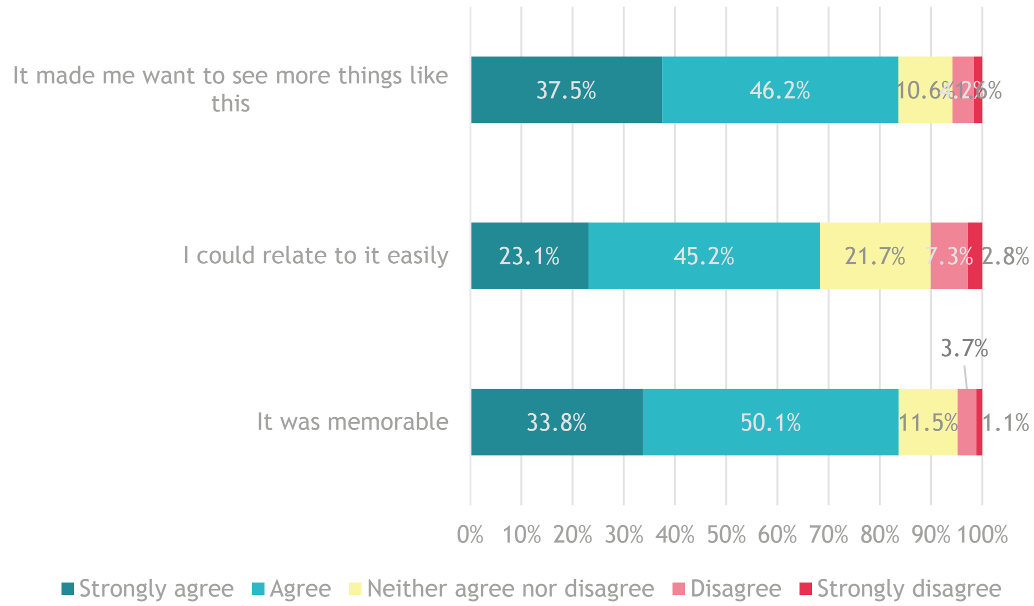
[3] See, for example, http://wolfbrown.com/component/content/article/42-books-and-reports/400-assessing-the-intrinsic-impacts-of-a-live-performance

wide range of galleries participating in the Visual Arts Cluster and the variety of programming that they undertake.

> *I thought the exhibition was rich in thematic [sic] and quite moving.*
>
> *Disagree about relaxing due to content. Moving as it played on your emotional aspects. Inspiring for own work*
>
> *Did not communicate to us this time*

The above quotes demonstrate not only the very wide range of emotional responses elicited, but the difficulty many audience members had in relating to this question. Whilst it is difficult to draw out any sector level implications from these resulsts, individual galleries may be able draw greater insight when viewing these benchmark results in the context of their own individual score. Future approaches to this area of research are discussed below.

Memorability and Desire to repeat



Galleries are providing a positively memorable experience, with 84% of visitors agreeing/strongly agreeing that their visit was memorable, and 84% agreeing/strongly agreeing that their visit made them want to see more things like this.

> *Lovely to discover this place - Wish I lived close- Well worth the train fare - Look forward to seeing future exhibitions. I came specifically to see [art work] but would definitely come again.*

> *On a dark February afternoon, I was delighted at the warm welcome that awaited me in the gallery. I so enjoyed the lovely warm colours and the shapes of the [main] exhibition. I shall certainly visit again.*

Generally respondents agreed or strongly agreed that they could easily relate to the exhibitions that they were visiting, with only 10% of visitors disagreeing or strongly disagreeing with the statement. However, in a similar way to the 'Relaxing' element, this is not to suggest that galleries should aspire for their exhibitions to necessarily be easy to relate to, as the following respondent comments illustrate:

> *Should art be easy to relate to?*

I rarely feel as though I understand what the exhibition is about... But I quite like that....

Going forward, galleries should take confidence in the level of positive responses regarding the desire to repeat. At a basic level this can be used for advocacy internally and externally to demonstrate the positive impact that galleries are having. It is also an area for galleries to explore more widely against the context of their own results, remembering that the results presented here are the average across all the galleries taking part. Where galleries have results relating to memorability and desire to repeat that differ significantly from the average, they have an opportunity to explore why this might be and to explore what benefits there may be for them to work on specific areas. For example, in light of their 'Desire to repeat' score, organisations may look to influence or change the way that they communicate their offer; using a high score as a positive marketing message or a low score to address what gaps there may be between messaging and programme.

Galleries who scored lower than average around 'Memorability' have opportunities to strengthen this metric further through audience development; for example, galleries could provide post-visit activities (such as having content designed specifically to be explored post-visit) which provides visitors with opportunities to consolidate their experience and enhance the memorability of their visit.

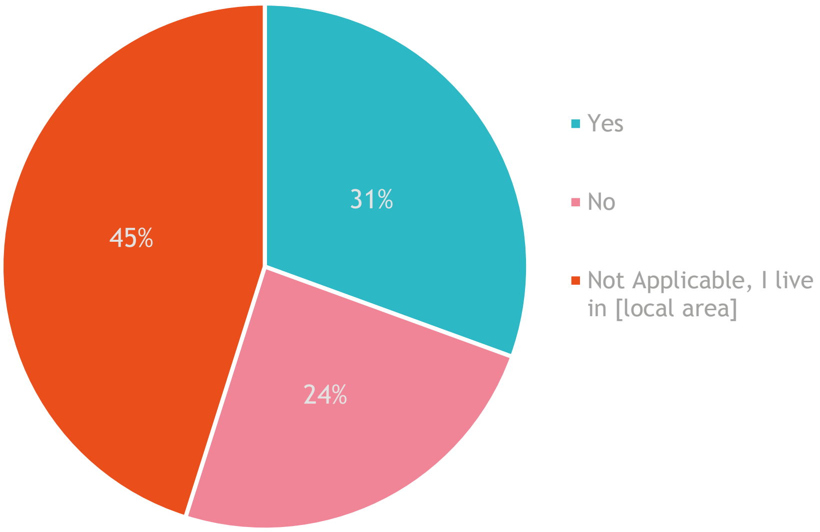
How important are galleries as drivers of visits to their local area?

To help inform both local and national advocacy, the galleries in the study wanted to establish the role they play in attracting visitors to their local area.

These results illustrate findings for galleries excluding London.

Visiting local area specifically to attend gallery

If you are visiting [org defined area] for the day or overnight, did you plan your trip particularly to go to [org]?



Galleries are playing a very strong role in attracting visitors to their local area. On average, just over half of visitors are from outside of the local area and one in three planned their trip to the local area especially to visit that particular gallery. Whilst for a further quarter, even if it wasn't their primary motivation, they included a gallery visit as part of their trip.

Extrapolating these findings into actual visitor numbers, this represents an estimated total of 1 million visits to the galleries' local areas being either entirely or partially motivated by the presence of the gallery.

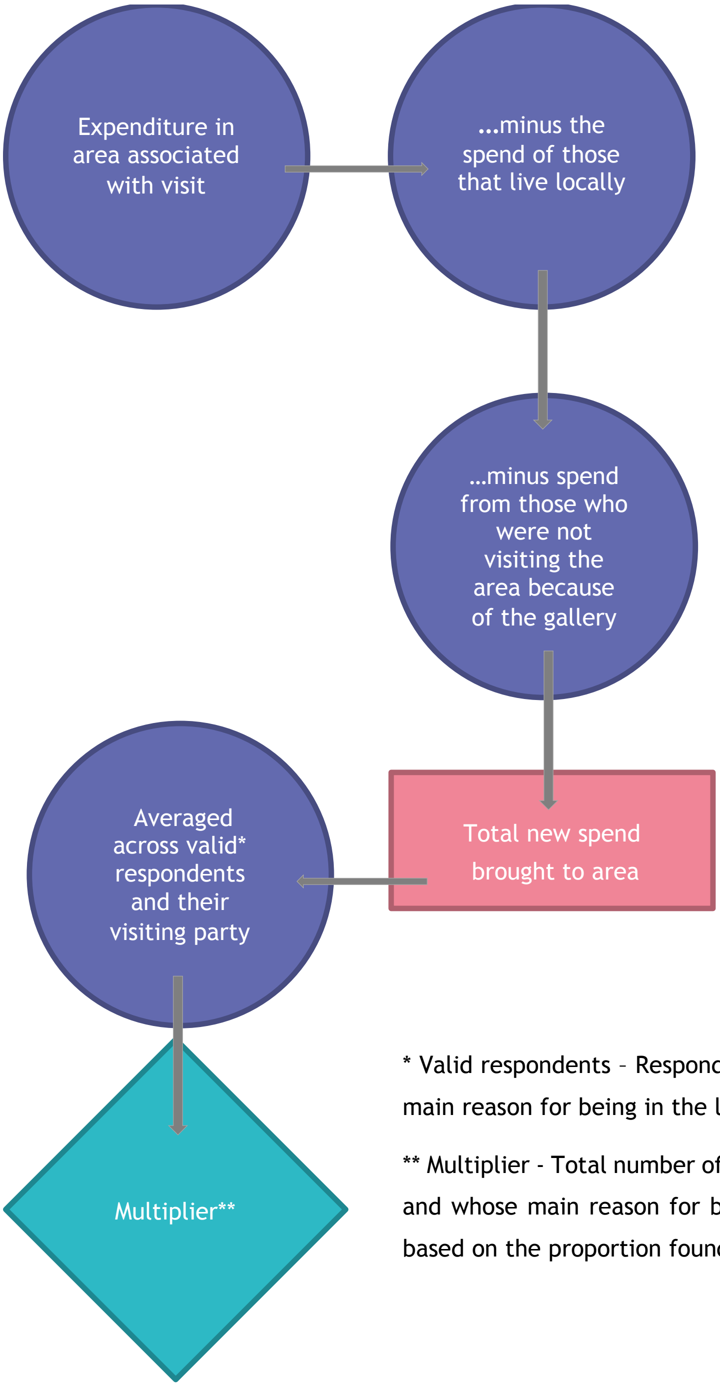
What is the value of the economic activity generated by gallery visitors?

Given the significant proportion of visitors who are travelling to the gallery from outside of the local area, what economic value do these visitors generate?

These results illustrate findings for galleries excluding London

New spend

The following diagram illustrates the basic principles of the local area spend calculations.



* Valid respondents – Respondents that live outside the local area and whose main reason for being in the local area was to visit the gallery

** Multiplier - Total number of 2014/15 visitors that live outside the local area and whose main reason for being in the local area was to visit the gallery, based on the proportion found within the sample.

The following table shows the average visitor new spend by item. New spend is defined as spending by the 31% of visitors who have visited the galleries' (self –defined) local area specifically to attend the gallery.

Item	Average spend per person across participating galleries
Local travel	£1.45
Venue spend	£4.18
Accommodation	£6.68
Outside of Venue (shopping, food & drink etc.)	£7.59
Other	£2.75
Total spend	£22.66

These figures provide galleries with a useful benchmark against which to begin to compare their own results, being mindful to read them in the context of any income generating offers that they may have at their own venue. For example, it may be that a venue which does not have a shop or onsite dining facilities has a considerably lower venue spend but greater outside of venue spend.

Using the average total spend figure per person of £22.66 and the proportion of visitors within our sample who are visiting the area specifically to attend the gallery, we can extrapolate the total value of this new spend across the participating galleries.

This would amount to £25 million estimated total new spend; in other words galleries in this study have attracted an estimated £25m of new spend to their local areas during the period of the study.

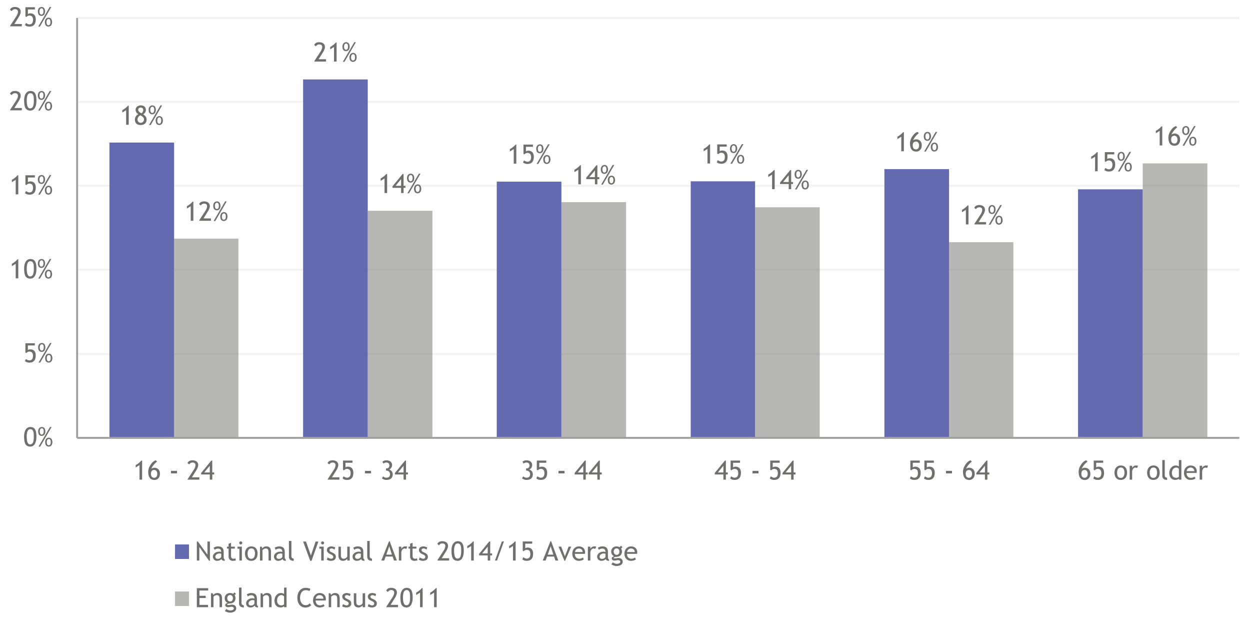
This sends a strong positive message about the impact that galleries are having on their local areas, not just in terms of the social impacts discussed elsewhere but also the impact that they are having in terms of economic activity. Going forward, the sector should consider using this figure for advocacy in discussions with key stakeholders such as local authorities, tourism, business and regeneration bodies

What is the profile of gallery visitors?

These results illustrate findings for galleries including London

Age

Which of the following age groups do you belong to?



Note - in the above chart, the figures for the England Census 2011 do not add up to 100%. Those aged under 16 are excluded, as visitors under 16 are not surveyed as a part of this project.

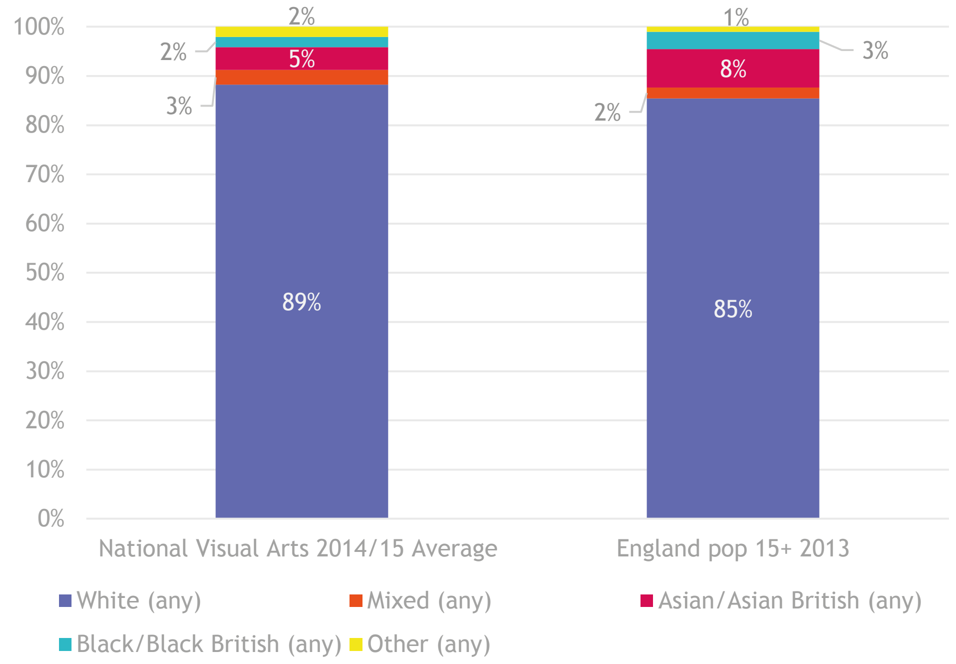
Galleries are successful at attracting a broad range of different age groups – with the age profile of gallery visitors generally matching that of the population. Galleries are particularly successful at reaching young audiences, with almost one in five visitors aged 16-24; and whilst on the whole there is a skew towards younger audiences, galleries are also effective at engaging older visitors, with the proportion of visitors aged 65 or older almost exactly matching the proportion of this age group in the population.

When we look at these findings in comparison with the result of the Outdoor Arts survey which was carried in 2014, we can see that the strength of the visual arts sector in reaching younger audiences is reinforced. In comparison to the 39% of the gallery audience who were aged 16-34, only 32% of respondents to the Outdoor Arts survey were aged 16-

34[4]. In addition, analysis of Audience Finder surveys carried out across the cultural sector during the 2014-15 benchmark year shows that only 26% of audience members across all art forms are aged 16-34, again reinforcing the strength that the visual arts sector has in reaching younger audiences.

Ethnicity

What is your ethnic group?



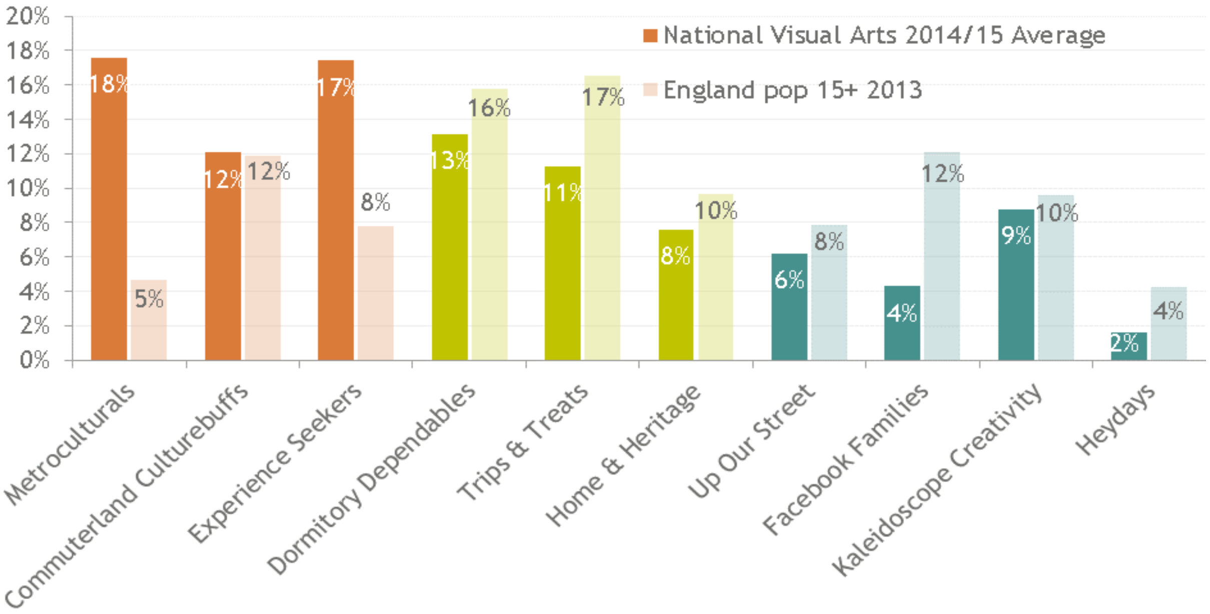
When we look at the data for all galleries, the ethnicity of attenders is broadly comparable to the population of England as a whole with 12% of the audience drawn from minority ethnic groups. This means that the Visual Arts have the most diverse audience profiles of those sectors taking part in the Audience Finder survey during the 2014/15 benchmark year. In comparison, the Performing Arts have the least ethnically diverse audience, with

[4] The full results of the Outdoor Arts survey can be found on The Audience Agency website here http://www.theaudienceagency.org/insight/outdoor-arts-audiences1

3% of the audience drawn from minority ethnic groups[5], whilst 9.5% of the audience for Outdoor Arts are drawn from minority ethnic groups.[6]

Audience Spectrum

Another way of describing the profile of gallery visitors is to look at geo-demographic profiling. **Audience Spectrum** is a profiling system developed by The Audience Agency which uses attitudes and attendance in the arts and culture as a distinguishing factor alongside other public and commercially available demographic data. It splits the population into 10 groups by taking the postcode of each attender and matching it to the profile of the people living in the area (see Appendix iii and http://www.theaudienceagency.org/audience-spectrum)



The above graph illustrates the Audience Spectrum profile of the English population compared to the Audience Spectrum profile of gallery visitors including London

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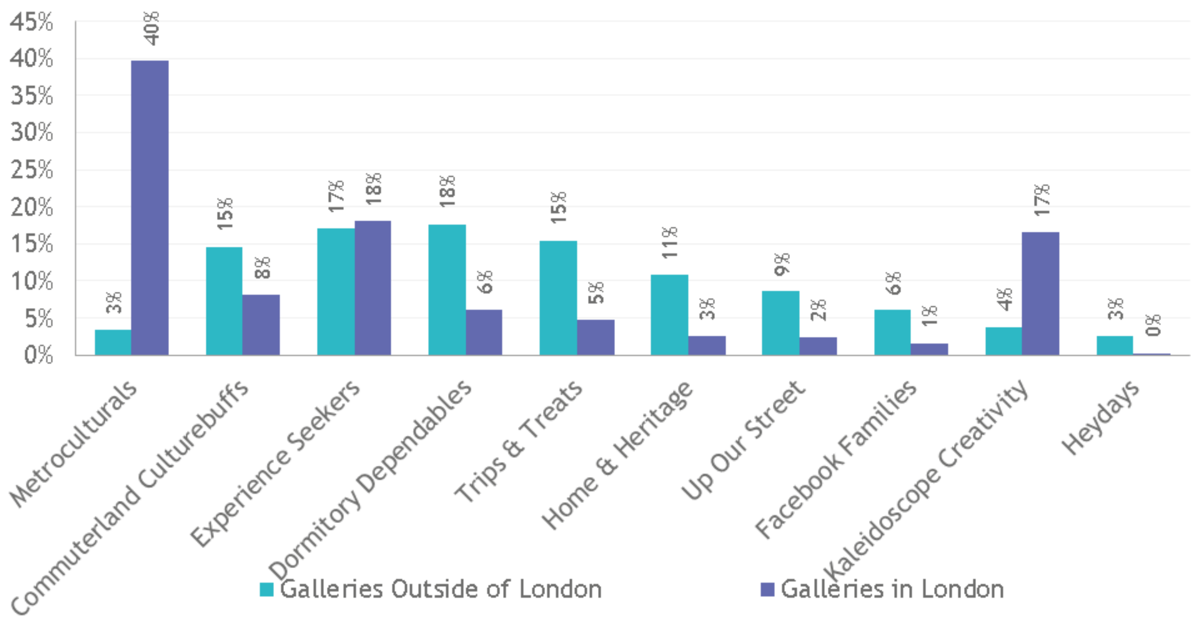
5 Report to follow

6 Outdoor Arts survey as above

galleries. The differing colours signify the level of engagement of the segments; orange are highly engaged, green have a middle level of engagement and blue are less engaged.

We can see that nationally, galleries are attracting predominantly those audience segments that are highly engaged (almost half of visitors are drawn from the high engaged groups ***Metroculturals, Commuterland Culturebuffs and Experience Seekers***). However, to what extent is there a distinct 'London factor' impacting the Audience Spectrum profile of gallery visitors?



This chart compares the visitor profile for those galleries within London with those outside. Immediately we can see that the profile for galleries outside of London shows a broader spread of different Audience Spectrum segments, with mid engaged segments (***Dormitory Dependables***, ***Trips and Treats*** and ***Home and Heritage)*** being particularly well represented amongst visitors.

This suggests that some galleries are doing well to attract a socially diverse and reflective cross section of their community. Organisations whose individual figures show a similar comparison to their background population should celebrate this fact and recognise their success in engaging visitors from a wide range of engagement types. They may also be able to provide models of best practice to other galleries and should consider whether they would be willing to share their individual findings more widely.

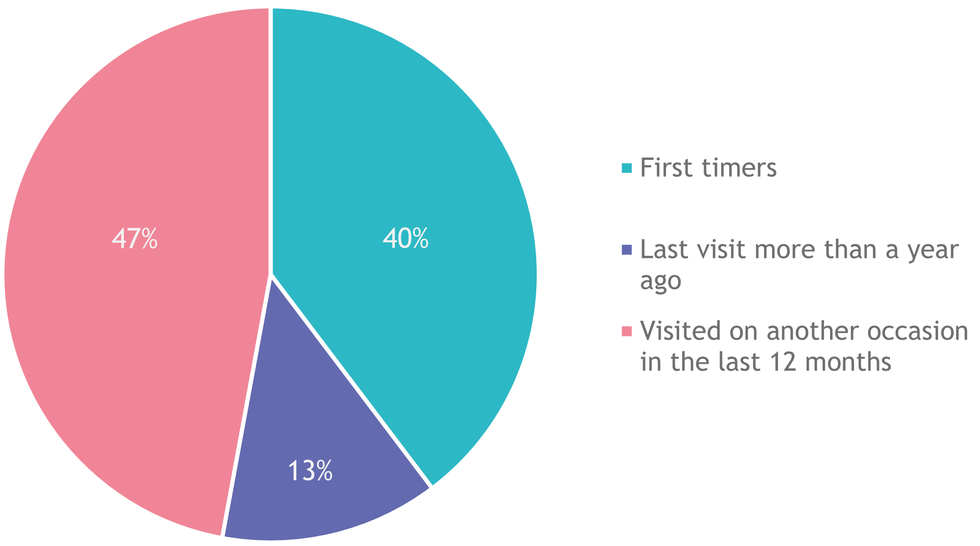
Within London, the dominant audience spectrum groups are two highly engaged groups – ***Metroculturals*** and ***Experience Seekers*,** groups that we would expect to be attending visual arts in large numbers, and which are over –represented in the London population. This is particularly the case with *Metroculturals* who make up 27% of the population of London but only 5% of the population nationally and are 40% of the gallery attenders within the sample of galleries based in London. *Metroculturals* as a group have a high presence across all art forms within London. This is reflective of their tendency to engage with a wide spectrum of cultural activity and their likelihood to have chosen to live within cities (and particularly London) due to the cultural opportunities presented by city life. Galleries within London should be aware of the impact that this group will have on the profile of their visitors but should see it not as a hindrance rather as a positive reflection of the loyalty of their audience; *Metroculturals* are high consumers of the arts so their inclusion of galleries as part of their consumption habits shows the importance they place on galleries as part of the cultural offer.

There is also a high level of attendance from a group which is usually considered to have a low level of engagement: ***Kaleidoscope Creativity***. This group are usually difficult to engage with and whilst nationally they make up only 10% of the population, within London they make up 35%. Comparatively, this means that galleries within London are more successful at engaging this group and provides a positive picture of the work that galleries within London are doing to engage with their local communities.

What are the attendance patterns?

These results illustrate findings for galleries including London

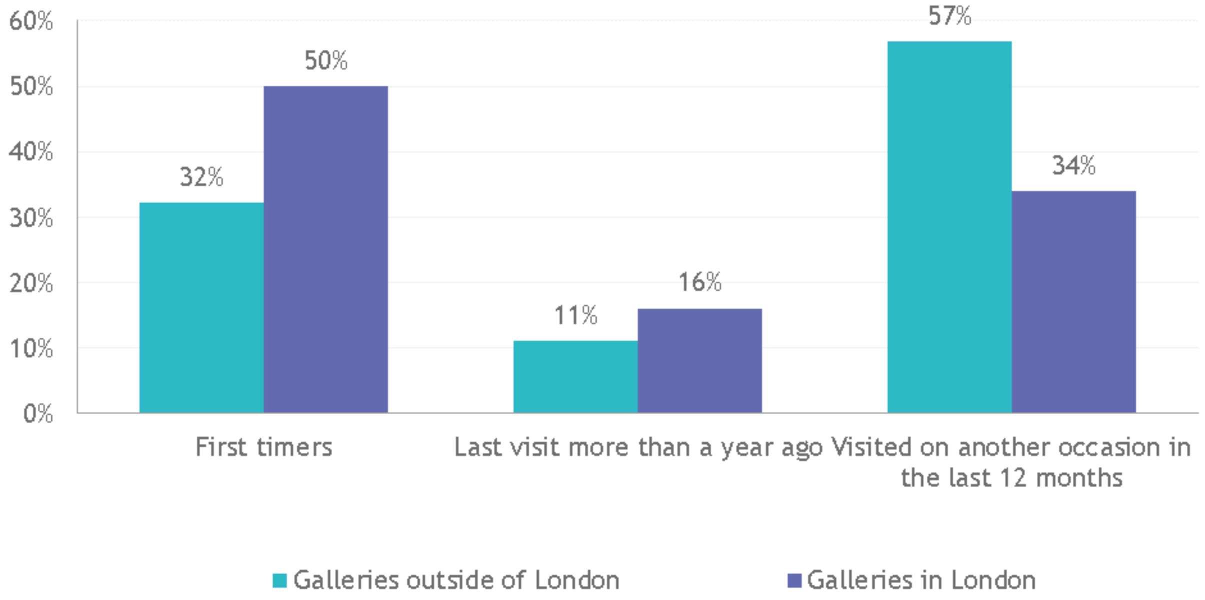
Previous attendance



Galleries enjoy a regular and loyal audience with around half of visitors having visited previously visit within the last 12 months

Those who had visited the gallery on another occasion in the last 12 months, had on average made 3.3 visits. This level of frequency aligns with many galleries programming cycles, suggesting that a significant proportion of visitors are seeing all or most exhibitions programmed. It isn't yet possible in Audience Finder to compare this attendance frequency with other sectors, but once such data is available this will provide a valuable comparator.

We can also compare the attendance pattern for galleries in, and outside of, London.

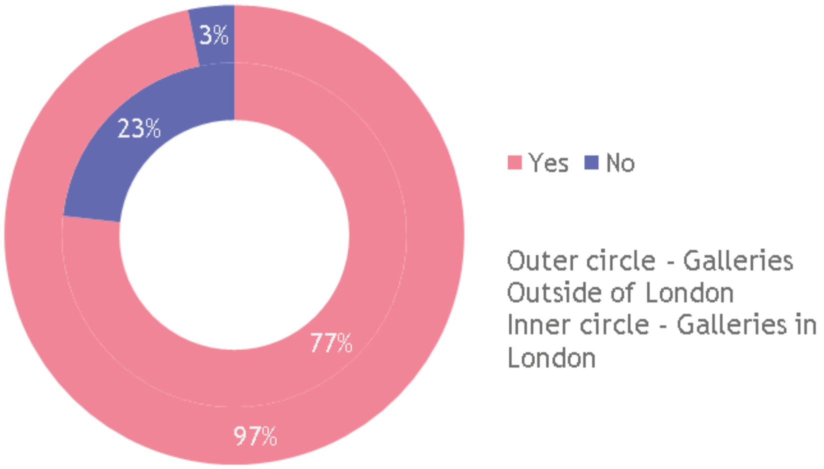


The picture in London is rather different to the rest of country. First timers account for half of all visitors, which reflects the high number of both international and domestic tourists who visit London and include a gallery visit in their itinerary.

Recently returning visitors account for more than half of the visitors to galleries outside of London, and on average they had made 3.6 visits within the last twelve months. However, these returning visitors still account for one third of visitors to London galleries (and had visited on average 2.7 times in the last twelve months), so, whilst the level of tourism skews the overall picture, galleries in London also benefit from a core of loyal and regular visitors as seen in regional galleries

UK/Overseas Visitors

Are you a UK resident?

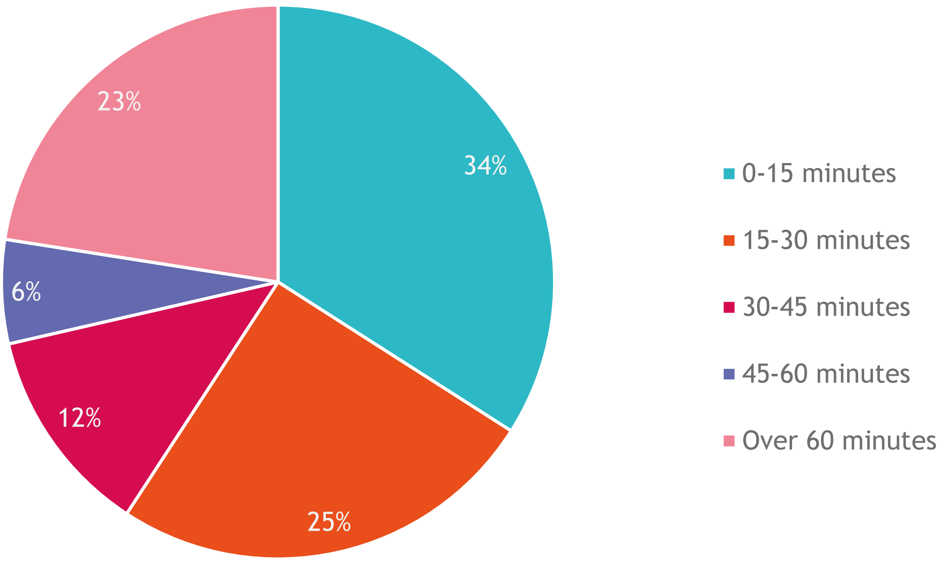


When we compare the level of overseas visitors at galleries inside and outside of London we can see a significant difference, with nearly a quarter of visitors to galleries in London being resident overseas. This higher level of overseas visitors also helps to explain the higher level of first time visitors to galleries in London.

Drive time

Derived from postcode

These results illustrate findings for galleries including London



On average one third of visitors are very 'local' to the gallery they visited, with a drive time of less than 15 minutes; with a further one in four living up to 30 minutes from the gallery. Visitors from further afield also make up a significant proportion, with almost one quarter living more than 60 minutes from the gallery, as we would expect from the results of the gallery as a driver of visits question[7].

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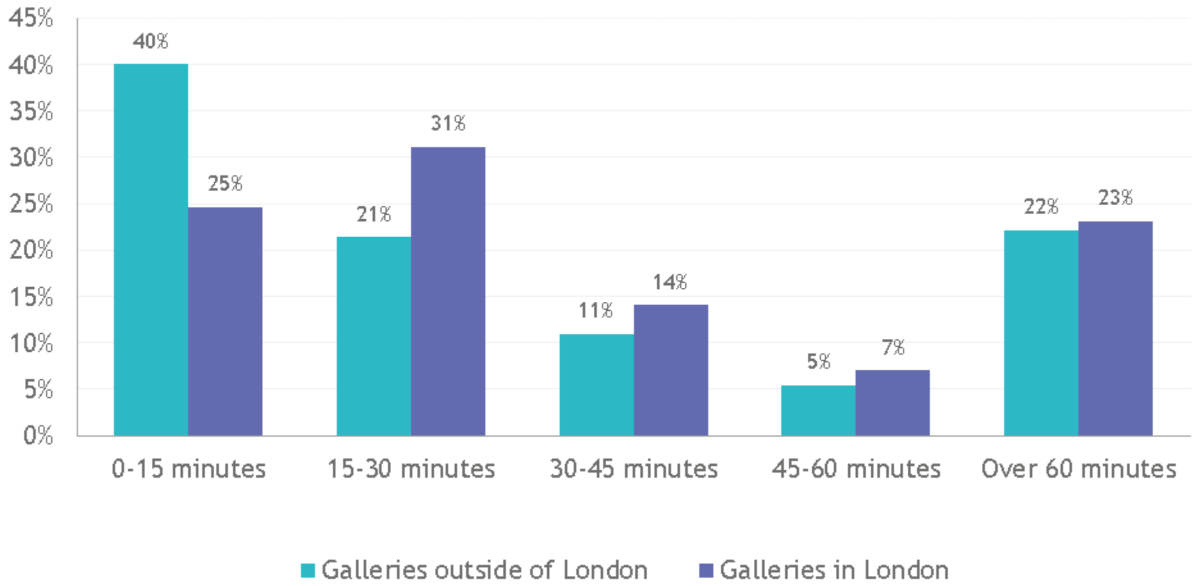
[7] it is worth noting though, that as those results represent only galleries outside of London, and are based upon a 'local area' as defined by the participating organisation, the results are not directly comparable



When we compare the results for drive time at galleries within and outside of London, we can see the impact of the unique scale of London. Outside of London a much higher percentage of visitors live very locally, with 40% of attenders visiting from within a 15 minute drive time, whereas only a quarter of visitors to galleries in London are this local. However, once those visitors who live within 15 and 30 minutes drive time are included (which is a more realistic definition of 'local' within London), this accounts for over half of London gallery visitors. This suggests that galleries both within and outside of London are drawing a significant proportion of visitors from their local area.

Implications

There are three key areas that this report can inform; advocacy for the sector, developing audiences and future research.

Advocacy for the sector

There are four main stories for advocacy within this report:

- Audience Diversity
- Success in attracting tourist visitors
- Success in attracting galleries' local communities
- Economic Activity

Across all of these areas there will be galleries who have scored more highly than average who may be able to provide models of good practice to the sector. Although we are unable to identify these galleries within this report, participants at the *Picture This* event on 30 July 2015 in Leeds had the opportunity to hear from galleries with particularly positive results, about their practice and approaches[8]. The regional CVAN networks can also provide the opportunity for galleries to share and learn from one another and develop advocacy and stakeholder messages beased on these findings.

Audience diversity: The visitor profile of contemporary visual arts attenders is broadly representative of the background population of England when we look at both age and ethnicity. When we compare this to other artforms, we can see that the visual arts are the most representative of the background population, demonstrating the wide reach of their programmes. The visual arts outside of London are also very successful at attracting visitors from across different levels of engagement. Galleries should use this information for internal and external advocacy, looking at the benchmark in comparison to their own results and their local background population. In areas where galleries are seeing a less representative visitor profile, they have the opportunity to develop their audiences further and work with those organisations who provide models of good practice.

[8] A brief report of these discussions will be available soon at http://www.theaudienceagency.org/insight

Success in attracting tourist visitors: galleries are reaching audiences from a wide variety of locations, with one in four visitors travelling for over 60 minutes to visit the gallery and one in three visitors making a trip to an area specifically to visit that gallery. In combination with the economic activity findings, galleries have a powerful tool for advocacy to key local stakeholders.

Success in attracting galleries' local communities: a third of visitors to galleries are from within a 15 minute drive time of that gallery, a figure which increases to 40% when we consider only those galleries outside of London. Coupled with the high level of repeat attenders and the level to which visitors represent the background population of England, as a whole galleries appear to have strong ties to their local communities.

Economic Activity: the cluster wished to explore the level of visitor related economic activity within their local areas in order to go some way to making a case for the economic worth of the visual arts. The figure that we have extrapolated of £25m worth of new spend brought in by visitors to participating galleries during the benchmark year provides the sector with an opportunity to positively advocate its quantitative worth to the wider cultural sector. For any participants that wish to report on the full economic impact of their gallery, it will be possible to enter their individual results into The Audience Agency Economic Impact Toolkit calculator, which together with data about thier visitors, funders, and organisation, will auto generate an economic impact report.

Developing audiences

Cultural tourism; there is clearly significant potential for the sector to reach more cultural tourists, both day visitors and overnight stays. Galleries may want to consider working in partnership with other tourism providers; by ensuring they are included in existing itineraries and destination guides, or using the evidence within this report to create new targeted visitor itineraries, combining culture with shopping, food and other visit activities. Galleries may also look to develop partnerships with other venues within their local region to strengthen the cultural offer that they can provide to tourists who are already in to the local area. Ensuring their offer is clearly visible through signage, wayfinding, publicity and outdoor advertising will be important as will other tranditional tourism marketing approaches such as 'familiarisation' visits for accomodation providers and other key tourism providers.

Local communities: Further interrogation of the Audience Spectrum profile of current visitors alongside galleries' local population will demonstrate areas of potential, and provide useful insights into the motivations, preferred communications channels and approaches of particular audience segments. This report suggests that galleries are offering an enjoyable and social experience, and for those who wish to broaden their audience beyond their existing highly engaged visitors, highlighting these social aspects of their offer in their communications messages is likely to be effective. As well as existing community outreach and learning and participation activities, galleries may also wish to consider encouraging local groups to make greater use of the facilities that they provide, deepening their relationship with these groups in the process.

Memorability: Galleries have an opportunity to develop the memorability of the experiences that they are providing for their audiences by developing the post-experience offer. By providing visitors with content or experiences which are only available after a visit, galleries can help build a deeper level of engagement, increasing the memorability of the experience and increasing the likelihood of visitors repeating the experience.

Next steps for the research

In addition to continuing to gather surveys in year two, there are two areas that the cluster and the wider sector may wish to consider for future research.

The first is to carry out further analysis of the results for organisations based on size, examining the differences between small, medium and large galleries. One of the common statements put forward regarding the sector is that the size of the gallery has an impact on type of audience that attend. Going forwards, we can use the Audience Finder data set to test this assumption and explore what – if any – implications this may have for the sector.

Another approach that the cluster may wish to consider is the use of quality metrics, either alongside or instead of the "Quality of Experience" question set.

Quality metrics ask visitors to qualify a set of statements across a range of aspects of the vist: staff, access, quality, information, facilities and the whole experience. These metrics provide organisations with tangible methods to understand and - where necessary – improve the experience of visitors. Going forwards, it may be better for the cluster to adopt these quality metrics rather than solely focusing on quality of experience; whilst quality of experience provides retrospective qualitative data it is less useful to help stimulate conversation around improvement internally. It may be that in the future a combination of quality metrics and quality of experience questions is most suitable, allowing for a combination of tangible elements in combination with a more holistic understanding of the exhibition experience.

Appendix i - Participating Galleries by region

East Region

Gallery	Location
Firstsite	Colchester

East Midlands Region

Gallery	Location
Derby QUAD	Derby
National Centre for Craft & Design	Sleaford
New Art Exchange	Nottingham
Nottingham Contemporary	Nottingham
The Collection	Lincoln

North East Region

Gallery	Location
BALTIC Centre for Contemporary Art	Gateshead
Berwick Visual Arts	Berwick-upon-Tweed
National Glass Centre	Sunderland
The Customs House	South Shields

South East Region

Gallery	Location
Aspex Gallery	Portsmouth
De La Warr Pavilion	Bexhill on Sea
MK Gallery	Milton Keynes
Modern Art Oxford	Oxford
Towner	Eastbourne
Turner Contemporary	Margate

Yorkshire Region

Gallery	Location
Impressions Gallery	Bradford
The Tetley	Leeds
Yorkshire Sculpture Park	Wakefield

North West Region

Gallery	Location
Bury Art Museum	Bury
Castlefield Gallery	Manchester
FACT	Liverpool
Live at LICA	Lancaster
Tate Liverpool	Liverpool
The Bluecoat	Liverpool
The Dukes	Lancaster
The Lowry	Salford
Whitworth Gallery	Manchester

South West Region

Gallery	Location
Arnolfini	Bristol
Newlyn Art Gallery & The Exchange	Newlyn/ Penzance
Spike Island	Bristol
Thelma Hulbert Gallery	Honiton

West Midlands Region

Gallery	Location
Eastside Projects	Birmingham
Ikon Gallery	Birmingham
Meadow Arts	Shropshire
The New Art Gallery Walsall	Walsall

London Region

Gallery	Location
Barbican Art Gallery	City of London
Beaconsfield	Lambeth
Camden Arts Centre	Camden
CGP London	Southwark
Chisenhale Gallery	Tower Hamlets
Courtauld Gallery	Westminster
The Curve	City of London
Design Museum	Southwark
Drawing Room	Southwark
Gasworks	Lambeth
ICA	Westminster
Matt's Gallery	Tower Hamlets
National Gallery	Westminster

National Portrait Gallery	Westminster
The Photographers' Gallery	Westminster
Rivington Place	Hackney
Serpentine Galleries	Westminster
South London Gallery	Southwark
The Showroom	Westminster
Tate Britain	Westminster
Tate Modern	Southwark
V&A	Kensington & Chelsea
Whitechapel Gallery	Tower Hamlets

Appendix ii – Full results

Exhibition experience

Emotional

Question	Rating	National Visual Arts 2014/15 Average	Lowest	Highest
It was emotional/moving	Strongly agree	16%	6%	33%
	Agree	30%	20%	45%
	Neither agree nor disagree	36%	25%	55%
	Disagree	15%	2%	28%
	Disagree strongly	3%	1%	7%
	Base	*6,442*		
It was relaxing	Strongly agree	23%	9%	46%
	Agree	45%	31%	52%
	Neither agree nor disagree	22%	9%	40%
	Disagree	7%	0%	14%
	Disagree strongly	3%	0%	6%
	Base	*6,500*		

Intellectual

Question	Rating	National Visual Arts 2014/15 Average	Lowest	Highest
I learnt/discovered something new	Strongly agree	28%	14%	55%
	Agree	50%	38%	55%
	Neither agree nor disagree	15%	3%	25%
	Disagree	6%	1%	14%
	Disagree strongly	1%	0%	2%
	Base	*6,524*		
It deepened my understanding	Strongly agree	21%	6%	50%
	Agree	43%	31%	41%
	Neither agree nor disagree	26%	11%	40%
	Disagree	9%	3%	17%
	Disagree strongly	1%	0%	3%
	Base	*6,458*		

I felt inspired	Strongly agree	22%	8%	48%
	Agree	40%	31%	40%
	Neither agree nor disagree	26%	9%	38%
	Disagree	10%	2%	23%
	Disagree strongly	2%	0%	5%
	Base	*6,472*		

Social

Question	Rating	National Visual Arts 2014/15 Average	Lowest	Highest
There was a lot to talk about	Strongly agree	28%	10%	47%
	Agree	52%	30%	60%
	Neither agree nor disagree	14%	9%	26%
	Disagree	5%	1%	11%
	Disagree strongly	1%	0%	3%
	Base	*6,537*		
I enjoyed it	Strongly agree	43%	16%	68%
	Agree	46%	28%	64%
	Neither agree nor disagree	7%	4%	12%
	Disagree	3%	0%	9%
	Disagree strongly	1%	0%	3%
	Base	*6,651*		
It was fun	Strongly agree	22%	8%	48%
	Agree	40%	31%	40%
	Neither agree nor disagree	26%	9%	38%
	Disagree	10%	2%	23%
	Disagree strongly	2%	0%	5%
	Base	*6,511*		

Memorability & desire to repeat

Question	Rating	National Visual Arts 2014/15 Average	Lowest	Highest
It was memorable	Strongly agree	34%	13%	60%
	Agree	50%	36%	58%
	Neither agree nor disagree	12%	0%	23%
	Disagree	4%	1%	11%
	Disagree strongly	1%	0%	2%

	Base	*6,576*		
I could relate to it easily	Strongly agree	23%	9%	46%
	Agree	45%	31%	52%
	Neither agree nor disagree	22%	9%	40%
	Disagree	7%	0%	14%
	Disagree strongly	3%	0%	6%
	Base	*5,775*		
It made me want to see more things like this	Strongly agree	38%	12%	64%
	Agree	46%	27%	58%
	Neither agree nor disagree	11%	6%	16%
	Disagree	4%	2%	11%
	Disagree strongly	2%	0%	4%
	Base	*6,632*		

Visiting local area specifically to attend gallery

Visiting local area specifically to attend gallery	National Visual Arts 2014/15 Average	Lowest	Highest
Yes	31%	17%	61%
No	24%	6%	57%
Not Applicable, I live in [local area]	45%	17%	72%
Base	*6,392*		

Drive time

Drive distance bands	National Visual Arts 2014/15 Average	Lowest	Highest
0-15 minutes	34%	7%	69%
15-30 minutes	25%	6%	38%
30-45 minutes	12%	0%	30%
45-60 minutes	6%	0%	15%
Over 60 minutes	23%	0%	69%
Base	*13,332*		

Visitor spend

Item	National Visual Arts 2014/15 Average	Lowest	Highest
Local travel	£1.45	£0.22	£5.64
Venue spend	£4.18	£0.12	£9.93
Accommodation	£6.68	£0.00	£28.47
Spend outside venue	£7.59	£1.91	£19.26
Other purchases	£2.75	£0.51	£13.91
Total itemised spend	£22.66	£8.07	£59.99
*Base**	*3,697*		

**Averages and base figure also takes into account respondents visiting party.*

Age

Age group	National Visual Arts 2014/15 Average	Lowest	Highest	England Census 2011
16 - 24	17%	0%	54%	12%
25 - 34	21%	3%	29%	14%
35 - 44	15%	5%	29%	14%
45 - 54	15%	8%	28%	14%
55 - 64	16%	5%	30%	12%
65 or older	15%	3%	47%	16%
Base	*23,410*			*53,012,498*

Ethnicity

Ethnic group	National Visual Arts 2014/15 Average	Lowest	Highest	England Census 2011
White (any)	89%	67%	100%	85%
Mixed (any)	3%	0%	8%	2%
Asian/Asian British (any)	5%	0%	16%	8%
Black/Black British (any)	2%	0%	11%	3%
Other (any)	2%	0%	10%	1%

Base	*24,407*			*53,012,456*

Sex

Sex	National Visual Arts 2014/15 Average	Lowest	Highest	England Census 2011
Male	39%	21%	55%	49%
Female	61%	45%	79%	51%
Base	*24,591*			*53,012,498*

Disability

Disability	National Visual Arts 2014/15 Average	Lowest	Highest	England Census 2011
Yes, limited a lot	2%	0%	6%	8%
Yes, limited a little	7%	2%	16%	9%
No	91%	81%	97%	82%
Base	*15,072*			*53,012,498*

Audience Spectrum

Segment	National Visual Arts 2014/15 Average	Lowest	Highest	England Census 2011
Metroculturals	18%	0%	13%	5%
Commuterland Culturebuffs	12%	4%	30%	12%
Experience Seekers	17%	3%	41%	8%
Dormitory Dependables	13%	7%	26%	16%
Trips & Treats	11%	7%	25%	17%
Home & Heritage	8%	1%	28%	10%
Up Our Street	6%	3%	17%	8%
Facebook Families	4%	0%	19%	12%
Kaleidoscope Creativity	9%	0%	22%	10%
Heydays	2%	0%	15%	4%
Base	*12,884*			*43,812,880*

Previous Attendance

	National Visual Arts 2014/15 Average	Lowest	Highest
First timers	40%	2%	79%
Last visit more than a year ago	13%	2%	21%
Visited on another occasion in the last 12 months	47%	15%	91%
Base	*20,884*		

UK/Overseas visitors

	National Visual Arts 2014/15 Average	Lowest	Highest
UK residents	89%	85%	100%
Overseas residents	11%	0%	15%
Base	*23,654*		

Appendix iii - Audience Spectrum

Metroculturals

Prosperous, liberal urbanites, Metroculturals choose a city lifestyle for the broad cultural opportunity it affords. They are therefore interested in a very wide spectrum of activity, but many tend towards their own preferred artform or style. Although active museum attenders, more engage with the arts and many on a weekly basis. Working in demanding but rewarding professions, they are highly educated and have a wide variety of other interests from food and travel to current affairs and architecture. Metroculturals are particularly prevalent in London where they make up 27% of the population in comparison to only 5% nationally.

Commuterland Culturebuffs

Affluent and settled with many working in higher managerial and professional occupations. Commuterland Culturebuffs are keen consumers of culture, with broad tastes but a leaning towards heritage and more classical offerings. Mature families or retirees, living largely in leafy provincial suburban or greenbelt comfort, they are willing to travel and pay for premium experiences, their habits perhaps influenced by commuting. Motivations are multiple, ranging from social and self-improvement, to the pursuit of learning opportunities for older children. They tend to be frequent attenders and potential donors.

Experience Seekers

An important and significant part of urban arts audiences, these highly active, diverse, social and ambitious singles and couples are younger people engaging with the arts on a regular basis. Students, recent graduates and in the early to mid-stages of their careers, they live close to city centres, have easy access to and attend a wide variety of arts, museums galleries and heritage. Interests cover mainstream, contemporary and culturally diverse offers and attending is at the heart of their social lives. They are mostly in search of new things to do and have disposable income to spend on a variety of leisure activities like sports/arts memberships and frequent visits to cafes, bars and restaurants. Digitally savvy, they will share experiences through social media on their smart phones.

Dormitory Dependables

A significant proportion of audiences are made up of this dependably regular if not frequently engaging group. Most live in suburban or small towns and show a preference for heritage activities, alongside popular and more traditional, mainstream arts. Many are thriving well off mature couples or busy older families; lifestage coupled with more limited access to an extensive cultural offer mean that culture is more an occasional treat or family outing than an integral part of their lifestyle.

Trips & Treats

While this group may not view arts and culture as a passion, they are reasonably active despite being particularly busy with a wide range of leisure interests. Comfortably off and living in the heart of suburbia their children range in ages, and include young people still living at home. With a strong preference for mainstream arts and popular culture like musicals and familiar drama, mixed in with days out to museums and heritage sites, this group are led by their children's interests and strongly influenced by friends and family.

Home & Heritage

Conservative in their tastes, this more mature group appreciates all things traditional: a large proportion are National Trust members, while classical music and amateur dramatics are comparatively popular. While this is not a highly engaged group – partly because they are largely to be found in rural areas and small towns – they do engage with the cultural activity available to them in their locality. They look for activities to match their needs and interests, such as accessible day-time activities or content exploring historical events.

Up Our Street

Living reasonably comfortable and stable lives, Up Our Street engage with popular arts and entertainment and museums, and are also visitors of heritage sites. Many are older and have some health issues, living on average or below average household incomes, so access in all its forms can be an issue. Modest in their habits and in their means, value for money and low-risk are important factors in leisure decision making.

Facebook Families

Arts and culture play a very small role in the lives of this younger, cash-strapped group living in suburban and semi-urban areas of high unemployment. They are the least likely to think themselves as arty, while less than a third believe that the arts is important. Nevertheless, they do go out as families: cinema, live music, eating out and pantomime.

Kaleidoscope Creativity

Characterised by low levels of cultural engagement despite living in and around city areas where plenty of opportunities are within easy reach. A great mix of people comprise this segment with a wide range of ages, living circumstances, resources and cultural backgrounds all living cheek-by-jowl. Low incomes and unemployment can present barriers to accessing some cultural provision. Nevertheless, two thirds do engage with more popular and accessible culture annually, some of this in the local community and outside the mainstream. Free, local events like outdoor arts, festivals and carnivals may appeal, and so might popular offerings like musicals and music events.

Heydays

Heydays are the group least likely to attend arts or cultural events, believing that the arts are no longer as important or relevant to them as perhaps they once were. Many live in sheltered or specially adapted accommodation for older people, and are excluded from many activities due to a raft of health, access and resource barriers. If they do engage this is likely to be participatory such as craft and knitting, painting, reading and writing activities organised by their sheltered housing, church group or community library.

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